CU*ANSWERS Project Release Planning Last revised: April 30, 2025

This list shows major projects in the pipeline for upcoming releases for CU*Answers software products, including CU*BASE®; **It's Me 247** online, mobile, and text banking; CU*Talk; UCI middleware solutions; Imaging Solutions products; Analytics Booth; and other CU*Answers software products. Releases may also contain a number of minor modifications not outlined here.

All release dates and projects listed are **tentative and subject to change**, and we reserve the right to delay slated projects based on QC test results.

KEY TO RELEASE NUMBERS

Sample: **XXX.24.05.01**

XXX represents the team/product*
24 represents the year (2024)
05 represents the month (May)
01 represents a sequence number
*Not used for CU*BASE releases*

2025 Releases

2025 CUBASEPTF → CUBASE Annual Merge	Sunday, January 12th
CU*Answers and Site-4 Online CUs Only	

Product: **CU*BASE**		
	Determine release content	**February 4**
	Tool request deadline	March 21
	Beta selection period	February 25 – March 11
	Technical Release Review	March 18
	Internal notification	March 25
Release #: **25.05**	Beta training	**March 27**
	Beta start	**March 30**
	Release summary to CUs	April 28
	Client training	
Release type:	**Release date for:** • Online • Site-Four • Self-Processing	**May 18**
Beta clients:	MyUSA CU, Partnership Financial, Polish American FCU	

Proj#	Description
48401	Create an API for Scheduled Transfers
57952	Add option to loan category to prevent loan payoff from OLB
59900	Allow dual emboss for individual members – debit/credit
60888	New Process to Populate Loan Data to HMDA Information Tool
61147	Add transfer parameter to max earnings sweep configuration
61252	Create a process to import mortgage statement mailing audit from Sage Direct
61428	Enhancements to Dollar amount search on GL history search screen
61511	NMS has requested a new file export and import process to be setup with Capital Tax
62057	Activate retailer groups for credit card cash back programs
62060	Activate retailer groups for Card Activity rebates
62335	Adjustment in phone inquiry to handle check viewing exceptions
62459	Eliminate Operation Execution errors for CASS run

Proj#	Description
62592	Create an "Edit" Function in Member Connect that doesn't require a File Name
62760	Enhance Work with Tracker Follow-ups to add reassign
62803	Create New Routine to Capture PMI and Property Tax Information for Reporting om 1098 Tax Form
63090	Create a new billing process for Real Time Payments.
63112	Block list for ITM Services
63279	New EOD report to track ACH on-demand posting
63301	Enhancements to mini-contracts when into rates expire
63555	Add a "Save/Done" Button on the Payment Protection and Miscellaneous Coverages Screen in Tool #20 Update Account Information
63655	Add field to CU master config to identify box for each CU
63681	Add the word Xtend to Tool 31 to state Xtend Share branch Member vs Shared Branch Member
63692	Change to allow ITM loan payments other than the scheduled payment
63712	Changed key fields in A2A files to differentiate between multiple records with same account number
63772	Remove the 'refinance' verbiage from tool 507 and update to Loan Extensions and Modifications
63811	Updated insurance verbiage in master parameter screen
63946	Adjustment to the Print Fed ACH transmission summary tool
63947	Correct CFT Fee posting to the balance on a credit card loan.
63947	Eliminate running balance issue caused by CFT fees on credit cards
64088	Additional fields for member View tables
64216	Change default value of fee code for new safe deposit boxes
64528	Correct where the Payable To field on the Member Escrow Disbursement Schedules Table is not updated
64705	Cosmetic CTR screen correction
65062	Modify GUI version checking to accommodate CBX requirements
65899	Overlay Change to Price You Pay For Credit Forms
65922	Screen changes and program recompiles for 59900
65923	Screen changes and program recompiles for 63692
65949	Screen Changes for UCUMST-02 to support 63655

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
~~**63501**~~	~~Enhancements to int-only loans~~

Proj#	Description
61145	Enhance member transfer to add suffix lookup and global search
61791	Add open dates to the Loan Productivity Analysis dashboard
63579	New Loan Ins/Debt Protection Configuration Report
65259	Update Charge off Savings/Checking Tool to Add Joint Owners to Blocked Person List
63513	Add Exception Check Holds to Automated Check Holds Processing

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
58071	Batch account adjustment posting
58074	New Option to pay escrow analysis surplus funds by check
60152	Add ability to schedule future loan rate changes
60153	Create a Flat File for Escrow Analysis
60203	Add Two Factor Authentication to Password Resets / Redesign ARU/OLB Access (PIN) Screen
60882	Modify Credit Bureau Selection to Default FUEL Decision
61192	Expand FUEL Decision Model Interface with Sync1 to Allow a Re-decision
61634	Convert Tool #658 Print Account Info Sent to Credit Bureau to a CU*BASE Dashboard View
61649	Enhance Secondary Names feature
61790	Allow Delinquency Freeze Settings by Membership Designation
61981	Add Cross Channel patterns to Abnormal Activity Monitoring
62620	CLR Path 1Click Offers - new type of 1Click Offer based on the member's CLR Path Decision Advisor score
63138	Abnormal Activity Monitoring: Add Stop-No-Go Patterns for ACH Deposits
64051	Dividend Application (DivApl) Configuration Dashboard (add to existing tools #777 and 963)
64162	OLB: New standalone "Show My Offers" module for the 1Click CLR Path offers project
64183	New tool to import membership info for creating membership records (tool for manual mergers)
64491	GOLD development for screens related to data queue in project 62844

CU*BASE

Release #: **25.12**	Tool request deadline	November 7
	Beta selection period	-
	Technical Release Review	
	Internal notification	December 2
	Beta training	
	Beta start	-
	Release summary to CUs	November 17
	Client training	
Release type:	**Release date for:** • Online • Site-Four • Self-Processing	**December 7**
Beta clients:		

Proj#	Description

Targeted/planned for this release but not yet confirmed as feasible:

Proj#	Description
TBD	Pub 1220 revisions for tax processing

Other "Squeaky Wheel" Projects in the Pipeline to Track

These are projects not already slated for a release but where a project champion has asked that these get attention as soon as possible.

Proj#	Description
59436	Correct credit pull program from adding additional manual pulls on system
59522	Correct AFT payments for 360 mortgages when set to pay regardless of other payment to pay principal only when current instead of calculating interest
60719	Update 1Click to include fee for modified APR
60808	Adjust Delinquency Monitoring to Account for Payment Changes to LOC's that are Scheduled After the Current Payment Cycle
60882	Modify Credit Bureau Selection to default FUEL decision
61192	Expand FUEL decision model with Sync 1 to allow a re-decision
61330	Create a monthly billing file for Payrailz P2P and A2A transactions and fees.
61373	Account Aggregation (See/Jump) for BizLink 247 business online banking (see #63962 & 63963)
61482	Add eSign Feature to Auto-Approved Flex Loans in Online Banking
62015	Add full MICR to the Account Details screen in online banking
62452	Create an interface with the Federal Reserve with the FedNow® Service (for receiving funds only)

Proj#	Description
63138	Abnormal Activity Monitoring Add Stop-N-Go Patterns for ACH Deposits
63428	Create an OLB UI for Payrailz A2A
63470	Revamp Statement Message/Insert Instructions for month/year format
63560	Payment Change Calculation Adjustment for Insurance & Debt Protection Premiums (former #62897)
63603	New Ops tool to purge 1Click offers on demand based on offer creation date
63847	Adjust receipts to honor daylight-saving time flag at the workstation level
63962	OLB: Online banking components for Account Aggregation (See/Jump) for BizLink 247 (see #61373)
63963	MTG: iOS & Android components for Account Aggregation (See/Jump) for BizLink 247 (see #61373)
64305	Automatically produce the LACHXC (ACH Non NSF and NSF) Exceptions reports and place them in the DAILYXX outque.
64598	Receipt adjustment for hidden shares
64877	Adjust the billing program that pulls data re text messages, to handle the new MFA message type (companion to 64876)
65242	Change the $0 memo deposit transaction description on incoming A2A Loan Transactions
65387	Fix 5300 Call Report Ratio Delinquent Loans/Total Loans to Include Delinquent Loans 60-89 Days
65392	Correct unknown member balances printing on receipts. From Research Project 65212
65396	Update FUEL decision to obey retention logic in OPER
65396	Update FUEL Decision to Obey Retention Logic in OPER
65556	Native receipts not printing in national shared branching.
65558	Adjustment to Receipts for When No Summary Requested
65751	Eliminate Duplicate Record error when using tool 312
65961	Update tool 1125 record flood to correctly represent the projected amount field - Remove or Change the Ending Balance line from escrow analysis document. (65963 Merge Survivor)
66017	Create stored procedure for CU*Forms to retrieve Credit Insurance fields for Booked Loans
66030	Change age waiver for printed statement fees to ignore MO organization type accounts
66114	Create Stored Procedure for CU*Forms to get Booked Loan Info
66175	Wrong member information displayed on the Verify Member window when processing a Misc Advance with Serving Non-Owner
66146	Receipt Research: Balances showing for non-members