

26.10 CBX Release

BETA POOL APPLICATION

Revised: July 2026

Thank you for your interest in joining the 26.10 CBX release beta pool! To be considered, please complete all sections of the application:

- ☐ Release Teams/Task Assignments
- ☐ Agreements
- ☐ Credit Union Information
- ☐ Shared Arrangements and Services

Release Teams/Task Assignments

To ensure that the beta period is as successful as possible, we would like to know if your teams are able to test and report on specific functions of the 26.10 release in **CBX**, as well as other enhancements discussed during beta training. Think carefully about each item and who on your staff will be able to work with and provide feedback for it. Indicate your ability to test each item. **Please note that the inability to test an item does not automatically disqualify you from consideration.**

Release Team	Project Highlights	Testing Ability
Member Service	➤ Member-level online banking platform assignment	☐ We offer It's Me 247 ☐ We offer BizLink 247
	➤ Enhanced cross sales message on Phone Operator screen	☐ We utilize cross sales trackers
	➤ Address maintenance for secondary names via Phone Operator	☐ We utilize secondary names
	➤ Easily identifiable ATM/debit card orders	☐ We order ATM/debit cards via CBX
Audit	➤ Enhanced CTR screen workflow	☐ We utilize the CBX CTR workflow
	➤ Risk assessments for MAP via Tool #13	☐ We use both MAP and Qualifile
	➤ Ability to require MFA for reviewed member updates to personal information via OLB	☐ We will require MFA for member updates to personal information
Back Office	➤ Enhanced check register search	☐ We search the check register

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Agreements

Each release has its own unique requirements and eligibility criteria, and its own beta selection period, so a new application must be submitted to be considered for the release specific to this form. Please select that you agree to the following:

- ☐ My credit union would love to join the beta pool for the upcoming release. Based on the rules published for this release, I have confirmed that we are eligible, and I am authorized to commit the credit union to participate.
- ☐ My team agrees to attend any scheduled beta training sessions and to complete the beta-test logs and provide feedback during the beta period as instructed.
- ☐ My team agrees to test the specified features in CBX.

Credit Union Information

Credit Union			
Contact Name			
Email		Phone	

Shared Arrangements/Services

As noted above, each release has unique eligibility requirements, some that hinge on credit unions with relationships with certain services. Please select if your CU participates in the following shared arrangements:

- ☐ Xtend Shared Branching
- ☐ Another CBX Shared Branching arrangement (CU-to-CU)
- ☐ National Shared Branching (COOP)
- ☐ Xtend SRS Bookkeeping
- ☐ Neighborhood Mortgage Solutions (NMS)
- ☐ Shared employee arrangement with another CU (*i.e., someone at another CU signs on to your files to do work for you, or your employees sign on to another CU to do work for them, such as loan processing or management services*)

Once you have completed all sections of this application, please submit it to BetaPool@cuanswers.com for consideration. We will contact all applicants at the end of the beta selection period.

Questions? Contact a Client Service and Education Representative at 800-327-3478
See more about the beta pool here: <https://www.cuanswers.com/resources/beta/>