CU*ANSWERS Project Release Planning   Last revised: August 26, 2026

This list shows major projects in the pipeline for upcoming releases for CU*Answers software products, including CBX®; **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 CBX releases*

2026 RELEASES

Product:

CBX

Release #:

26.10

Release type:

Determine release content	**July 1**
Tool request deadline	August 7
Beta selection period	July 14 - 28
Technical Release Review	
Internal notification	August 18
Beta training	
Beta start	**August 23**
Release summary to CUs	September 22
Client training	
Release date for: Online, Site-Four, Self-Processing	**October 11**

Beta clients:

Proj#	Description
59599	Revamp Check Register Tool
61179	Correction for CTR screen and report
61480	Create 3 New Block Lists to Prevent Opening Savings, Checking and CD Sub Accounts
62512	Add access to pull a Risk Assessment (QualiFile) from Tool #13 for MAP applications
63151	Allow Address Maintenance for Secondary Names via Phone Operator
64858	Move OLB Platform and CC Summary Statement Options to Member Level
65730	Update Personal Information Maintenance Setting for OLB in Tool #569 to Allow Reviewed with MFA
66808	Adjust Phone Operator to Consistently Display Decision Advice and A2A Participation
66956	Add Highlighting to ATM/Debit Card Maintenance Screen to Identify Debit Card Orders
65769	Expand Collateral Tables to Have 4-Digit Year and Add Fields Related to Auto and Mortgage Collateral
60153	Create a Flat File for Escrow Analysis

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

Proj#	Description
63560	Payment change calculation adjustments for insurance/debt protection premiums
64086	Teller Check Capture via eDOC CheckLogic (Part 1): Scanning & Archiving Teller Outside Checks
65383	New Tool for Tracking Chargebacks for Debit and Credit Cards
66115	New 1Click Limit Increase Credit Card Loan Offers
66435	Updates to Third Party IRA/HSA/ESA Tax Processing including New Administrator Configuration
66851	Add Ascensus Integration to Phone Op/Member Transfers / Add IRA Withholding to Transfer Withdrawals from Phone Op/Member Transfers

Product:

CBX

Release #:

26.12

Release type:

Determine release content	**November 3**
Tool request deadline	November 6
Beta selection period	-
Technical Release Review	
Internal notification	December 1
Beta training	
Beta start	-
Release summary to CUs	November 16
Client training	
Release date for: • Online • Site-Four • Self-Processing	**December 6**

Beta clients:

Proj#	Description

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

Proj#	Description

Product:

CBX – Minor Releases

Proj#	Description	
64051	Dividend Application (DivApl) Configuration Dashboard (add to existing tools #777 and 963)	8/4/2026
66989	Add Member Address Information to Wire Tracking Information via Tool #981	8/4/2026
66876	Add Last Ten Accounts Lookup to CU File Maintenance Inquiry	8/4/2026

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
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
60153	Create a Flat File for Escrow Analysis
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
61482	Add eSign Feature to Auto-Approved Flex Loans in Online Banking
63246	e-Alert/e-Notices do not send configuration not recognizing times/not working
63304	Update Verbiage on Corporate Checks to display Remitter
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
64187	Enhance Open Lending Integration to Calculate Modified APR
64445	Update Logic for FUEL Decisions to Remove Legacy Decision Codes
64842	Update the Metro II reporting file to convert additional code to years instead of months
65242	Change the $0 memo deposit transaction description on incoming A2A Loan Transactions
65336	Enhancements to the Direct Vendor Interface Configuration
65368	Adjust Disbursement Instructions Program to Include Additional Parameters for Check Type
65396	Update FUEL decision to obey retention logic in OPER
65606	Correct effective date being calculated for file ACHDTL
65712	Changes to Incomplete Loan App Handling for the new online loan app
65769	Expand Collateral Tables to Have 4-Digit Year and Add Fields Related to Auto and Mortgage Collateral
65926	Correct logic for how long a credit report is valid in online banking
65999	Correct copy function on CU budgets.
66435	Updates to Third Party IRA/HSA/ESA Tax Processing including New Administrator Configuration
66585	Adjust the process for closing cards and requesting a new card to support sending real-time card add messages or adding the record into the nightly batch maintenance file

Proj#	Description
66637	Update Last statement curt-off date and Prior statement cut-off date fields to be open/editable in OPER 5427 Master CU Parameter Config
66788	Internal modifications to bill pay process to handle warning messages to operations dealing with possible duplicate transactions.
66895	Expand online banking Transfer Control database to allow more than 12 records
66949	Clear out Old Debts in Application from HOUSEHOLD File when no Debts are on Current Credit Report Pulled
66999	Allow for New Reporting of Qualified Charitable Distribution (QCD) IRA Codes
67134	Update FUEL Decision Model to Update Approval Underwriter ID for In-Branch Applications
67242	Add Default Credit Report Pull Setting for Online Banking Loan Apps to Loan Product Configuration
67270	OLB: Standalone web module allowing members to cancel a credit or debit card triggering a new physical card being sent
67343	Apply Employee Account Security to the CBX LOS
67344	Max Earnings Sweeps Enhancement: Daily Transfer Sweeps to LOC/Loan Accounts
67345	Create New API to Determine Next Suffix in Line for use in LOS Integrations
67347	Modify Logic to Build MBRDEMOGRQ Client View Table to Include All Active Memberships
67364	Modify the OLB Tiered Services Module to display links according to host configuration
67389	Correct issue when selecting option for print only on Financial Statement Report for Balance Sheet - Trial Balance throws an error in program PDOCREQ.
67460	PROD2: Review and make changes for Xtend Shared Branching on PROD2
67465	FUEL Approvals on incorrect application fix
67501	Adjust How OLB Use Agreement (EULA) Dates are Populated on CBX Screens/Reports New eStatement Acknowledgement in OLB
67514	If a members address is changed from foreign address to regular, update the FORTAXRPT file.
67524	Need Loan Interest Analysis report to be able to handle loan portfolio dollar amount $100,000,000 and greater
67631	Data Center: Remove Time Zone From Tax Processing Archiving
67672	Link Credit reports from new LOS to the loan application number
67693	Update Program Logic in PCRTLNAPP to Allow Loan Fees to be defaulted from Product Config in OLB Delivery Channels
67780	Adjustment to Program UMBRINS to Prevent Joint Coverage from Being Added to the Single Coverage Box
67879	Correct Bad Data Printing on Escrow Analysis
67889	New Table and Process for Box-to-Box Shared Branching
67954	Add timestamp for acceptance of credit pull in online banking

Proj#	Description
67969	Transition Loan Rate Board to New Online Loan Applications and Sunset Legacy Loan Apps for Authenticated Members
67973	Adjust NCUA Share Insurance Report Calculations for Single/Joint Accounts
67978	Update the indirect loan app creation program to properly account for the designation of Guarantor in loan app additional information file
67987	Enhance the Payrailz A2A product to allow the ability to set up A2As to loan accounts.
68056	Enhancements to R2S Integration with Sync1
68135	Delinquency Fine Calculation Enhancement – caps as % of payment
67460	PROD2: Review and make changes for Xtend Shared Branching on PROD2
67715	Correct issue within the Process Close Member Accounts to update update the closed account sequence when using Nickname.
67977	Change the Calculate Business Days program to not allocate the files used in the program to prevent file locks