Client Special Project Request/Authorization Form

CU*ANSWERS
A Credit Union Service Organization

This document is used to authorize requests for special services, such as Data Floods, Vendor Data Exchanges, Custom Fees, SSO Integrations and Other Custom Programming Projects. The companion document, "Step by Step Procedures for Initiating Special Projects for a Client" explains the process. Complete the Project Request Details section and then submit as an attachment to the project in Track*IT.

Remember to enter the project # on this form before saving and attaching it!

Project Request Details

Credit Union Contact Information

Credit Union		CU # / ID	

Contact Name		Phone	

Email	

Additional Contacts:

Name	**Email**

CU*Answers Contact Information

Name		Phone	

Email	

Vendor Contact Information

Name		Phone	

Email	

Project Description

Describe the project in detail so that we can begin the evaluation process. Provide as many details as possible; the more thoroughly we understand your request and all it will entail, the more quickly your project can move through the channels.

If there are any deadlines or time constraints that we should be aware of, please include these details (both here and on the project sheet).

Project # ← ENTRY REQUIRED   Request Date

Project Fees

The following is an outline of the total fees for your project. Additional details and specifications may also be attached to this quote. Please review this information carefully, then sign and return a copy of this form indicating your approval of the terms and details specified. **Upon approval of this quote and receipt of all needed documents, this project will be submitted for programming resources.** If you have any questions or wish to clarify any portion of the specification, please contact us at the number indicated above.

Description of one-time charges	*$ Amount*	*Comments*
Less: Research & Design fee previously paid		
TOTAL PROJECT BID		

** For project bids over $25,000 CU*Answers requires a minimum 50% down payment at the time of signing with the balance invoiced upon project implementation.

Additional recurring charges	*$ Amount*	*Frequency*

Quoted by _____   Date _____   Expires _____

Important

I acknowledge that our Credit Union is responsible for performing our own risk assessment and due diligence on the third-party service provider(s) or vendor(s).

CU*Answers does not perform any due diligence on any third-party service provider(s) or vendor(s) described on this Bid Form. You should not sign this Bid Form without performing appropriate due diligence on the third-party service provider(s) or vendor(s) relative to the risk appetite of your credit union or organization. CU*Answers will provide reasonable assistance regarding any technology or integration due diligence questions but does not guarantee the accuracy of any such assistance. CU*Answers may decline to integrate with any third-party service provider(s) or vendor(s) even after this Bid Form is signed if we discover that integration is impractical or against our development standards as revised from time to time.

Client Approval to Proceed with Project

☐ We have decided not to pursue this project request.

☐ By checking this box, I approve the project specifications and agree that I am authorized to approve the above fee(s) to be billed to our Credit Union.

Authorized CU Employee (please print) _____   Title _____

Signature _____   Date _____

Return the signed copy back to CU*Answers