

New Credit Union Branch/Location Information

Revised: March 15, 2024

This form is used to request assistance in setting up CU*BASE configurations for a new credit union branch location. Submit the completed form to the Client Services & Education Team to begin the process.

Please plan for a **minimum of 30 days notice** to complete system and network configurations.

BRANCH INFORMATION

Credit union name CU # CUID

Staff contact

Phone # Email address

Branch # (used in the general ledger) Date branch opens

Name (40 characters are allowed)

Mailing address

City State ZIP

Shipping address

City State ZIP

Branch phone # After-hours phone #

Branch fax # County

Branch hours

Open Sunday? Yes No (NOTE: If your credit union does not already perform Sunday processing, you must complete the separate [Sunday processing request form](#).)

Deposit checks GL # Cash purchase/sell GL#

(Cannot be 739.00. Check branch 01 via **Tool #176 Branch Office Description** to confirm this GL#)

Use member branch accounting? Yes No

CREDIT UNION AUTHORIZATION

→ This form must be signed by an authorized credit union Security Officer.

Security officer name

Signature Date

INSTRUCTIONS

To transmit this request securely, please **save this form** as a *.PDF document and **attach it to a question** in the [AnswerBook](#).

FOR USE BY CLIENT SERVICES & EDUCATION ONLY

Call taken by Date Incident #

Processed by

Date Completed

- Notify Network Services of new branch information.
Copy of form goes to CU*Answers Accounting team to add to billing system.
Contact Lender*VP if the credit union is utilizing QualiFile.

- Add branch number and description (**Tool #176 Branch Office Description**)

- Add branch info to the Customer Profile database on the Production box

- Remind credit union to adjust existing "Workflow Controls" in CU*BASE through the AB incident.

FOR ADMINISTRATION USE ONLY

To be retained by Client Services & Education team according to the Records Retention Schedule.

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