New Credit Union Branch / Location Information

Revised: March 28, 2025

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](#).

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FOR USE BY CLIENT SERVICES & EDUCATION ONLY

Call taken by		Date		Incident #	
Processed by					

	Date Completed
☐ Notify Network Services of new branch information. 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.	
☐ Bill the credit union. ($500 per branch, use Billing Code 113003)	

Once complete, this document needs to be archived in the Corporate Vault per the Client Service department’s Record Retention Schedule.

FOR ADMINISTRATION USE ONLY

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

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