



Credit Union New Location/Branch Information Form

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Please return to CU*Answers Client Services - Fax# 616-285-7285 or csr_team@cuanswers.com

Direct questions to Client Services at 616-285-5711 or 800-327-3478

CU*Answers requires **minimum 30 days advanced notice** to complete system and network configuration

BRANCH INFORMATION:

Credit Union : _____ CU#: _____ CUID: _____

Staff Contact Name : _____ Incident # _____

Date New Branch Opens . : _____ Branch Number: _____

Branch Description : _____

Branch Name : _____

Address : _____

Shipping Address : _____ County: _____

Branch Phone # : _____

After Hours Phone # : _____

Branch Fax # : _____

Branch Hours : _____ Open Sunday? Yes No

(If your credit union does not already perform Sunday processing, you must complete separate Sunday processing form available online)

Deposit Checks G/L # : _____

Cash Purchase/Sell G/L # (Not 739.00. Check Tool 202, branch 01 to confirm GL):..... _____

Is the CU going to process *Member Branch Accounting*? Yes No

List of Employees at New Branch:

New Employees : _____

(Add user profile/teller IDs)

Existing Employees : _____

(Set up other authorized vaults in Employee Security)

FOR INTERNAL USE ONLY:

Checklist:

- Notify Network Services of new branch information Date _____
- Tool 176 Branch Office Description: Add branch number and description Date _____
- Tool 202 Chart of Accounts: Add location number and other configuration info Date _____
- Add the branch info to the Customer Profile on the iSeries production box Date _____
- Copy of form goes to CU*Answers Accounting team to add to billing system Date _____
- Contact Lender*VP if the Credit Union is utilizing Qualifile Date _____

Call Taken By : _____

Tasks Completed By : _____