



Credit Union New Location/Branch Information Form

Revised 2/20/2018

Please return to CU*Answers Client Services - Fax# 616-285-7285 via AnswerBook

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 : _____

Date New Branch Opens . : _____ Branch Number: _____

Branch Description : _____

Branch Name : _____

Address : _____

Shipping Address : _____

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 # : _____

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
- Tool #176 Branch Office Description/Modeling Ctrl:** Add branch number and description
- Tool #202 Chart of Accounts/Budget Groups Maint:** Add location number and other configuration info
- Add the branch info to the Customer Profile on the iSeries production box
- Copy of form goes to CU*Answers Accounting team to add to billing system

Call Taken By..... : _____

Form Completed By..... : _____