CU*BASE gold edition

CU*ANSWERS Client Services & Education

# New Credit Union Branch/Location Information

Revised: July 2, 2020

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/description for GL
*(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 #202 Chart of Accounts/Budget Groups Maint** 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. Or you may fax it to a Client Services Representative at 616-285-7285.

*Continued on page 2 >>>*

**FOR USE BY CLIENT SERVICES & EDUCATION ONLY**

| | | | | | |
|---|---|---|---|---|---|
| Call taken by | | Date | | Incident # | |
| Processed by | | | | | |

| | Date Completed |
|---|---|
| ☐ Notify Network Services of new branch information | |
| ☐ Add branch number and description (*Tool #176 Branch Office Description*) | |
| ☐ Add location number and other configuration info *(Tool #202 Chart of Accounts)* | |
| ☐ Add branch info to the Customer Profile database on the Production box | |
| ☐ Copy of form goes to CU*Answers Accounting team to add to billing system | |
| ☐ Contact Lender*VP if the Credit Union is utilizing QualiFile | |

**FOR ADMINISTRATION USE ONLY**

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

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