

CU*BASE Uploads (PC to CU*BASE)

iShield Security Access Request

Revised: February 5, 2019

This form must be used to request access for an employee to transfer (upload) data from a local workstation into CU*BASE. Per the [CU*Answers Client Support Security Policy](#), a special software tool restricts which users can upload data to CU*BASE. Access can be requested only by an authorized Credit Union Security Officer. This restriction is intended to protect the credit union against potential fraud from employees attempting to gain unauthorized access to member data. **Submit one form per employee, please.**

Authority Change for Credit Union Employee

CU Employee Name

CU*BASE User
(Login) ID

This employee:

- Does not currently have any upload access.

INSTRUCTIONS: Use the ADD section below to check only the permissions this employee actually needs.

- Already has some upload access.

INSTRUCTIONS: Use the sections below to check the things you want to *change*, either add or remove, not the items to which the employee already has access.

Upload Authority

ADD Authority

Grant this employee **new** access privileges to pull data from a local workstation into the following CU*BASE table(s): (DO NOT check the box if the employee already has access to a particular table.)

- FinCEN tables in QUERYxx (FCPERSON & FCBUSINESS)
- General ledger/budget import table in QUERYxx (GLIMPORT)
- Direct/mail processing import table in QUERYxx (DMPIMPORT)
- New membership apps in QUERYxx (MBRIMPORT)

- Specific table name(s) in
QUERYxx:

This employee will use the following tool(s) to pull data from a local workstation to CU*BASE (check at least one):

- Client Access (Tool #374) Data Transfers (Tool #1375)

REMOVE Authority

Revoke this employee's existing access privileges to upload data into these table(s):

- FinCEN tables in QUERYxx (FCPERSON & FCBUSINESS)
- General ledger/budget import table in QUERYxx (GLIMPORT)
- Direct/mail processing import table in QUERYxx (DMPIMPORT)
- New membership apps in QUERYxx (MBRIMPORT)

- Specific table name(s) in
QUERYxx:

Credit Union Authorization

→ **IMPORTANT NOTE:** This form must be signed by an authorized credit union Security Officer. If a Security Officer is not available, we cannot guarantee that download authority will be granted, even if the form is signed by a credit union CEO. Our policy requires that in order to protect credit union data we will follow up on any "urgent" upload requests by requiring additional authentication from the credit union.

- I understand provisions must be made to ensure that only authorized, appropriate data is pulled into the CU*BASE database, and that any errors introduced into CU*BASE tables as a result of these uploads is the sole responsibility of my credit union.
- I understand it is my credit union's responsibility to monitor the daily LSECAUDIT report showing who performed uploads, and the monthly LSECAUDITM report showing who has upload authority. *(Both are available in CU*Spy.)*

Continued on next page>>

Credit Union	<input type="text"/>	CU #	<input type="text"/>	CUID	<input type="text"/>
Security Officer	<input type="text"/>				
Signature	<input type="text"/>	Date	<input type="text"/>		

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.)

ADMINISTRATIVE USE ONLY

Processed by	<input type="text"/>	Date	<input type="text"/>
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Completed document to be archived in the corporate vault per the Client Service department's Records Retention Schedule.