

Credit Union Security Authorization Request

Revised: May 12, 2026

This form must be used to request access for credit union employees to log in to CBX. It includes special authorizations for Security Officer-level users as well as User IDs for other employees who access CBX in their day-to-day work. **IMPORTANT:** Only employees already designated as CU Security Officers can complete this form to add new users or designate new security officers.

*****USE BLACK INK ONLY*****

Section 1: Credit Union Security Officers

Complete this section if you need to add, remove, or change the names of the employees who are designated as credit union Security Officers. A security officer is responsible for updating employee ID settings in CBX and can also request additions and changes to User IDs to log in to CBX.

☐

Please **Add** the following name(s) as Security Officer

→ A new Security Officer cannot designate his or her own name here!

	Employee Name	Title	Contact #	Sample Signature
1 st				
2 nd				
3 rd				

☐

Please **Change or Delete** the following name(s) designated as Security Officers

Security Officer Name	Delete	Change	Instructions
	☐	☐	
	☐	☐	

Section 2: CBX Users

Complete this section if you need to add, remove, or change which credit union employees can log in to CBX. (User IDs will be assigned for you and relayed to your Security Officer.)

Add User

☐

Please add the following users:

→ IDs must represent actual people; our policies do not allow generic or shared IDs!

Employee Name	Title

Delete/Change User

☐

Please delete or modify the following users:

Employee Name	Title	Delete	Change	Instructions
		☐	☐	
		☐	☐	
		☐	☐	

Section 3: Credit Union Authorization

→ This form must be signed by an authorized credit union Security Officer. (Must be a digital signature or a handwritten one to match against our records.)

Credit Union		CU #		CUID	
Security Officer					
Signature		Date			

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 submit it via the [CU*Answers Store](#) (User ID Additions and Deletions).

ADMINISTRATIVE USE ONLY

Special Instructions: When deleting a User ID, ensure that the Customer Master Database in CBX has also been updated. Also ensure that the User ID is deactivated from the AnswerBook.

Processed by		Date	
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Completed document to be archived in the corporate vault per the Client Service department's Records Retention Schedule.