

Hong Kong Card Applications Guide



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Initiate and Approve Card applications with ease

The Corporate Card application process is now faster, more secure and collaborative than ever.



Secure and Device Compatible

DocuSign meets some of the most stringent global security standards and uses the strongest data encryption technologies available. Individuals using the solution can sign into the site from anywhere at any time, using the electronic device of their choice.



Save Time

Initiate applications with a few clicks and Applicants receive an invitation to apply. Line Managers or Authorised Signatories nominated to approve the applications are notified and can quickly action next steps.



Collaborative

Individuals involved with the Card application process can be nominated for each Applicants' journey.



Increase Accuracy and Speed of Card in Hand

Application contains mandatory fields and does not require a wet signature for approval, significantly reducing administration time.



Card Application Process - Entry Points



Entry Point
1
Program Administrator
receives application link
from Account Manager



Entry Point
2
Employee Initiated
Journey



Entry Point
3
Program Administrator
Initiates in @ Work



Entry Point
4
Program Administrator
Initiates in Hong Kong
Form Centre

Card Application Process - Employee Journey

1. Program Administrator or Card Applicant to complete fields including Applicant and Authorised Signer names with email addresses.



- 2a. Program Administrator has the option to fill in Company Information and more, clicks **'Complete'**. Form routes to Employee.



- 2b. If the Program Administrator initiates the application the Employee will receive a branded email from American Express, clicks **'Review Document'**.



3. Employee completes Applicant information fields.



4. Employee attaches HKID/passport, signs, and clicks **'Complete'**. Form is routed to Authorised Signer.





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Card Application Process - Authorised Signer Journey

5. Authorised Signer receives branded email from American Express, clicks **'Review Document'**.

Please Complete: American Express Corporate Card Application

 [Redacted Name]




American Express Corporate Card Program sent you a document to review and sign.

REVIEW DOCUMENT

[Redacted Address]

[Redacted Phone Number]

[Redacted Email Address]

Powered by DocuSign

6. Authorised Signer reviews, signs form and submits.

Sign Date Signed

Signature of Applicant Date DD MM YYYY

[Redacted Signature]

[Redacted Address]

[Redacted Phone Number]

[Redacted Email Address]

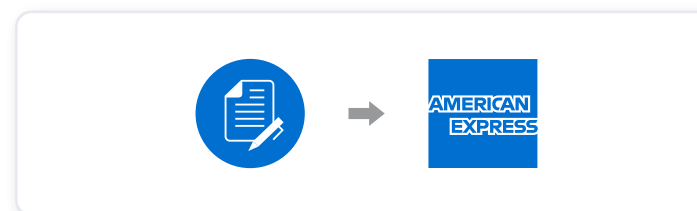
[Redacted Signature]

[Redacted Address]

[Redacted Phone Number]

[Redacted Email Address]

7. Form is routed to American Express for processing.

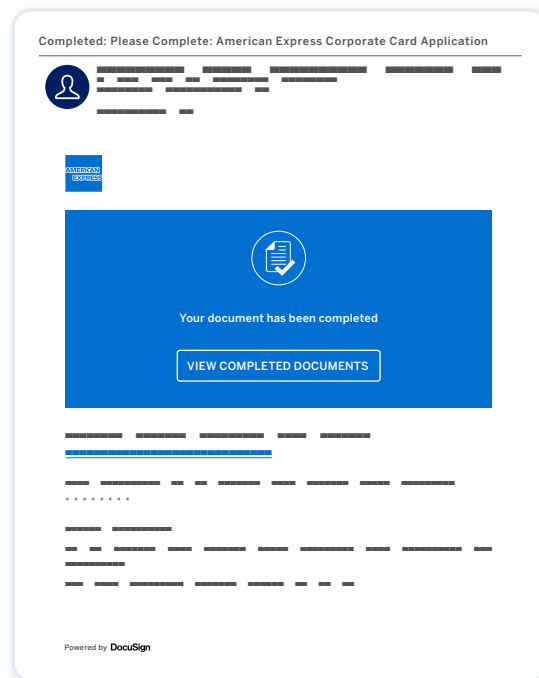




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Card Application Process – Submission Confirmation to all Users

8. All Users receive an email from American Express with the URL to view completed application.





Additional Feature – ‘Finish Later’

1. All Users have the option to save their form and finish at a later date.

A screenshot of a 'Finish Later' dialog box. The dialog has a title bar with 'Finish Later' and a close button (X). The main area contains a form with several fields, some of which are partially filled with dashed lines. At the bottom, there are two buttons: 'SAVE & CLOSE' and 'CANCEL'.

2. Users will be reminded in a series of emails to complete the form.

A screenshot of an email reminder for the American Express Corporate Card Application. The email header says 'Reminder: Please Complete: American Express Corporate Card Application'. Below the header is a user profile icon and name. The main body of the email features the American Express logo, a blue box with a document icon and the text 'American Express Corporate Card Program sent you a document to review and sign.', and a 'REVIEW DOCUMENT' button. The email also includes a signature block with a dashed line for a signature and a '*****' separator. At the bottom, it says 'Powered by DocuSign'.



Frequently Asked Questions

1. What is the new Card Application process and what is the benefits of using this process?

The new digital experience allows for an end-to-end digital Employee Card Application process, which previously included print-outs, wet signature, and physically passing applications.

2. Is American Express using a secured platform to process my personal information?

Yes, American Express takes security very seriously. Each form, with all personal and company data, is encrypted with the strongest data encryption technologies. For more information see <https://www.docusign.co.uk/products/electronic-signature>

3. What is the process involved?

A Program Administrator or Employee Card Applicant can initiate a Card Application online. By indicating the Card applicant and Authorised Signer's information, the Card application form will then be circulated among the assigned parties. After all signers completed the form, it will then be automatically sent back to American Express for review and processing.

4. How will the Card Applicant (Employee) and Authorised Signer put their signatures on the application?

There is an e-signature section where the signer can choose to use the computer to generate a signature, to draw a signature or to upload a signature image from your local drive.

5. Is the digital application mobile or tablet friendly?

Yes, the application can be accessed on desktop, mobile and tablet devices.

6. What Card products can we apply for using the digital Card application process?

American Express® Corporate Card, American Express® Gold Corporate Card, American Express® Cathay Pacific Corporate Card, American Express® Elite Corporate Card, American Express® Corporate Meeting Card and American Express® Corporate Purchasing Card.

7. If I don't have an Account Manager can I still use the digital application?

Yes, it is a very user-friendly application process that customers can complete without an Account Manager's assistance.

8. What if I don't know who my Authorised Signatory is?

You may need to contact your Company's Program Administrator.

9. Who do I contact if I need assistance?

Card Applicants are first directed to their Program Administrators if they need assistance. If the Program Administrator has questions, they can contact the American Express PA Servicing Team.



Frequently Asked Questions (cont.)

10. Can a Card Applicant initiate their own Card Applications?

Yes, the Card Applicant can receive the application from their PA, their Company's intranet site, or through the Form Centre. The PA will need to provide the following instructions to the Employee Card Applicant to begin the process:

- i. Click here to access the application: **[APPLICATION URL]** (based on product type and liability structure)
- ii. Enter your name and email for Employee and _____'s name and email for Authorised Signer. Then click 'Begin Signing'.
- iii. In the first portion of the application, enter the required 'Company Information' fields:
 - a. Company Name (in English): _____
 - b. Company Name (in Chinese): _____
 - c. Company Account Number: _____
 - d. Company Address: _____
 - e. Name of Program Administrator: _____
 - f. Tel No. of Program Administrator: _____
 - g. Email Address of Program Administrator: _____
- iv. Enter your personal information under 'Applicant Information'
- v. Upload a photo of your HKID or passport and E-Sign
- vi. Click 'Complete'

11. How many applications can PA's send at a time?

There are no limitations on number of applications sent from PA at a time.

12. Once sent to the Employee, how long do they have to complete an application?

You and your team will have 30 calendar days to complete your application form, starting from the day you completed the first part and sent the form to Cardmember.

13. If I save my application for later, how do I access my application again?

After you click 'Save and Finish Later', the website will ask you to input your email address. A reminder email with a link to the form will be sent to you.

14. What happens to my application if the Authorised Signatory originally nominated to approve my application is on unexpected leave and I've completed my Card Application?

The application will be on hold until the Authorised Signer completes the application.

15. How can a PA see where a Card Application is at in the process?

Once American Express has received and processed the completed application, added signers will receive an email notification with the completed application, including the documents attached.



Frequently Asked Questions (cont.)

16. How will the PA know if an application has been rejected by American Express?

An email notification will be sent to the PA if the application has been voided for reasons including errors or misinformation.

17. How do I access my Card Application?

You can access the Card Application from your Company's Program Administrator or on the Hong Kong American Express Form Centre.

18. Are there any notifications sent to remind me to complete my application online?

Yes, a reminder email will be sent to signers every 7 days they are yet to complete their section.

19. Are there mandatory fields on the application and will I know there is an error with the application?

Yes, there are mandatory fields on the application and the application will not move forward until all mandatory fields are completed. An alert will pop up on the error fields as indicators.

20. Can an applicant request an alternate delivery address for the Card?

The Card Applicant may contact **americanexpresscorpcardapplication@aexp.com** for an alternative delivery address.

21. Can I choose to rush my Card delivery?

Yes, you may check the box on the top of the application. An additional fee of HK\$395 will be charged.

22. Once my application has been submitted, can I still edit the application?

No, the process cannot be reverted once you have completed your part.

23. What are the required formats of the identity documents?

If you are Hong Kong permanent resident, please provide a copy of your permanent HKID Card in JPG/PNG/PDF format. If you are not a Hong Kong permanent resident, please provide your passport copy (the page with your photograph and personal information), also in JPG/PNG/PDF format.

