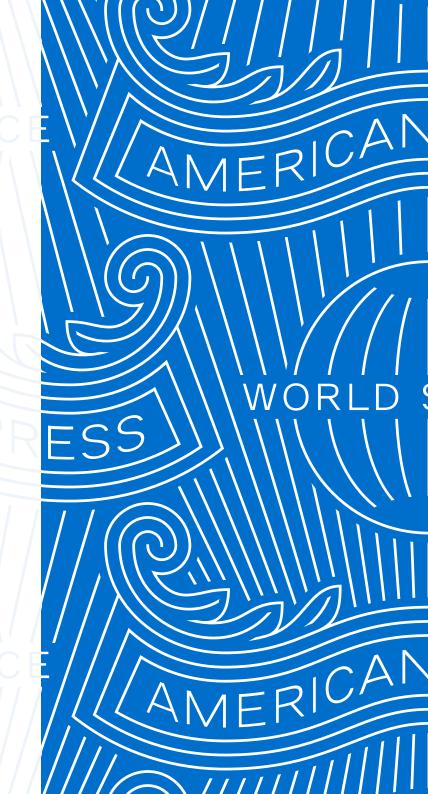
# Hong Kong Corporate Card Application Guide





# An easy way to apply for Corporate Cards

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



### **Secure Digital Process**

DocuSign allows individuals to securely sign and complete the application from any digital device, anytime and anywhere.



#### **Environmentally Friendly**

Application process is totally digital, no need to print or scan any paper form.



#### **More Efficient**

Initiate, approve and submit applications with just a few clicks. Forms are automatedly circulated to all parties, making it more efficient than ever.



### **Accurate and Time-Saving**

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

### **Contents**

This Document is fully interactive. Click on links within each page to navigate between sections.

### **Application Steps Overview**

### **Card Application Process**

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### **Frequently Asked Questions**

### **Application steps overview**



Get the form to start the application Program Administrator /

**Application Initiator** 

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Roles assignment
Program Administrator /
Application Initiator

3

Company information
Program Administrator /
Application Initiator

4

Applicant information and documents upload

Card Applicant

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Authorized signature
Authorized signer(s)

6

**Completed application**Form automatically sent to Amex



# Get the form to start the application

For Program Administrator/Application Initiator

You can get the application form from one of the following options.



#### **Form Center**

<u>americanexpress.com/hk/en/business/support/customer-service/forms-and-agreements.html</u>

Form Center > Corporate Card Programs > Cardmember Application Forms



@ Work®

enroltoatwork.com

Log in to @ Work > Initiate Card Applications

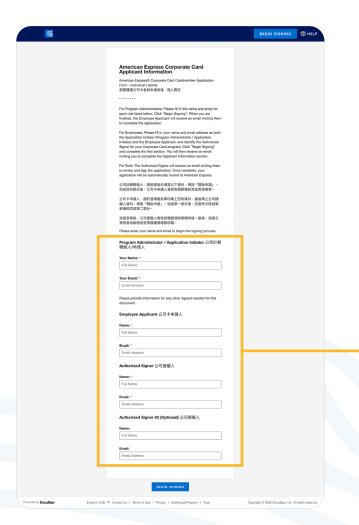


**Direct web link from Account Managers** 

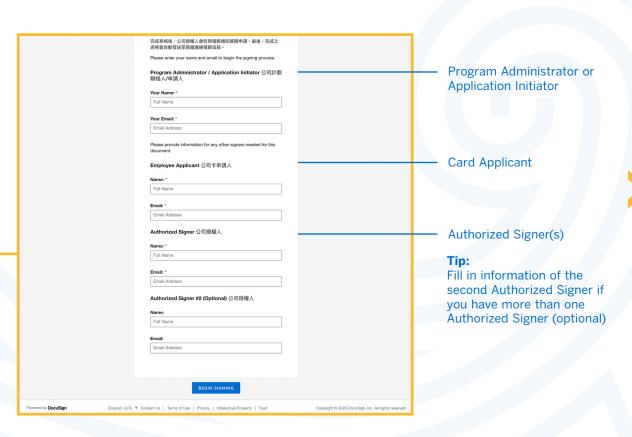


### Roles assignment

For Program Administrator/Application Initiator



Program Administrator/Application Initiator to provide the information of individuals involved with the application.













### **Company information**

For Program Administrator/Application Initiator



The form will be sent to the next signer automatically after PA/Applicant Initiator completed the company information.

At the same time, Application Initiator will receive an email from DocuSign.

#### American Express Corporate Card Program via DocuSign American Express® Corporate Card Application 美國運通公司卡會員申請 - Ben Lee

To: Abby Kan,

Reply-To: American Express Corporate Card Program





PA can search the form in mailbox using Card Applicant's name





American Express Corporate Card Program sent you a copy.

**REVIEW DOCUMENT** 



Click here to track the progress of application

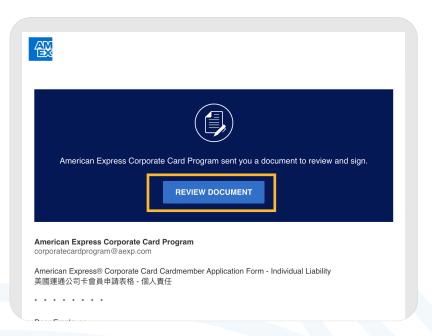


### Applicant information and documents upload

For Card Applicant

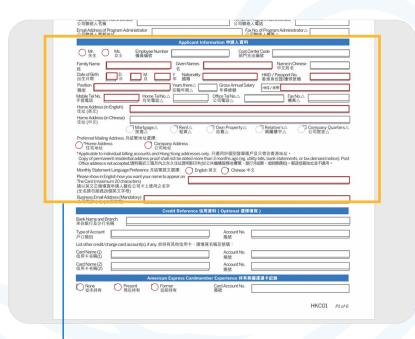


Card Applicant will receive an email after PA/ Applicant Initiator had completed the company information. Click 'REVIEW DOCUMENT'.





Fill in personal information on the form.



ip:

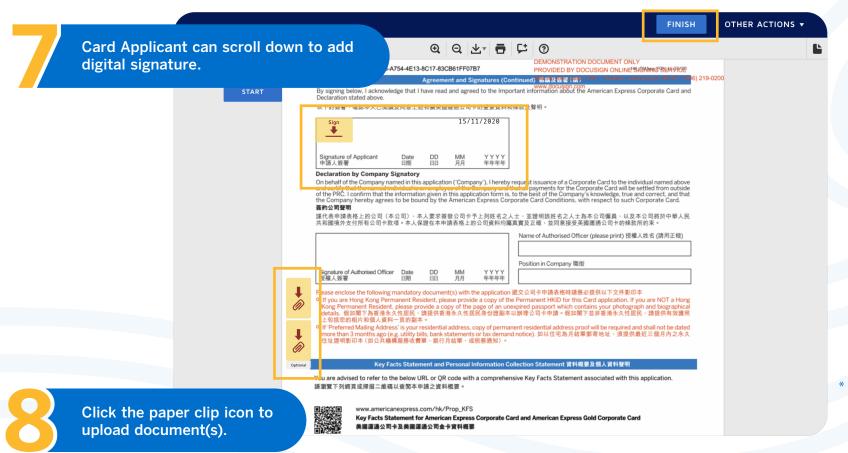
Check with your PA if you are unsure of the information



### Applicant information and documents upload

For Card Applicant





\* See detailed instructions on Signature and Document attachments in the next pages



#### There are 3 ways to create your digital signature:



#### 1) COMPUTER GENERATED SIGNATURE

- > Type in your signature name
- > Click "Change style" to select the font style
- > Click "ADOPT AND SIGN" to confirm your E-generate signature



Click 'Sign'



Required	
ull Name*	Initials*
Ben Lee	BL.
UPLOAD YOUR SIGNATURE	
or best results use an image that is 400 x 145 pixels	se the electronic representation of my signature and initials for all purposes when I for

#### 2) DRAW

- > Type in your signature name
- > Click "DRAW" and create your signature using mouse



Signature successfully added

#### 3) UPLOAD

- > Type in your signature name
- > Click "UPLOAD" to upload your signature image

#### ip:

Signature style can be saved and reused in other forms



#### How to upload ID document(s):

Click on the paper clip icon to upload your ID documents or passport image according to instructions.



Click 'UPLOAD A FILE' to choose a file from your local drive, then click 'DONE'.

ment	
Upload Attachment	×
BX年度 (明白本) 從該等要 UPLOAD A FILE	可識收頭
Comb	
pe ID: 0D3AAFD5-A754-4E13-8C17-83CB61FF07B7	DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSIGN ONLINE SIGNING
Agreement and Signatures (Continue	d) <sup>9</sup> 諸龍及發著 {關戶 1700 · Seattle · Washington
g below, I acknowledge that I have read and agreed to the Important is on stated above.	www.docusign.com nformation about the American Express Corporal
署,確認本人已閱讀及同意上述有關美國運通公司卡的重要資料和條款及	聲明。
. 15/11/2020	



### Authorized signature

For Authorized Signer

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Authorized Signer will receive an email after Card Applicant had completed the form. Click 'REVIEW DOCUMENT' to sign the form.

American Express® Corporate Card Application 美國運通公司卡會員申請 - Ben Lee



Reply-To: American Express Corporate Card Program





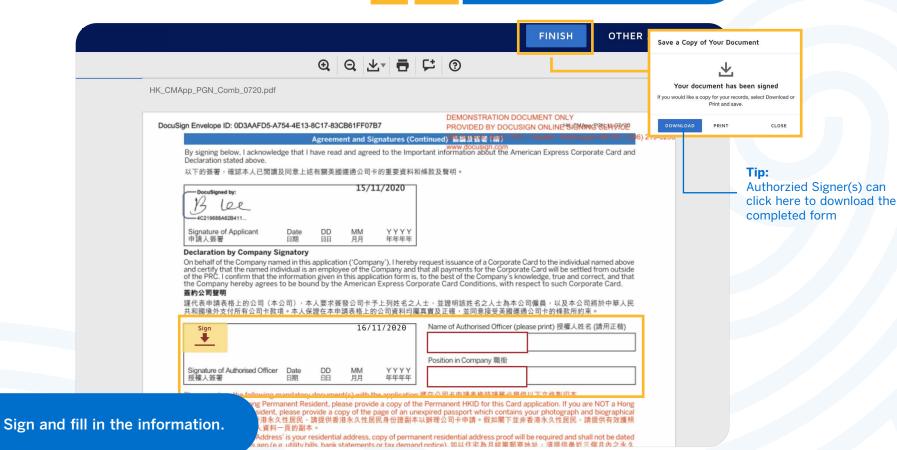
American Express Corporate Card Program sent you a document to review and sign.

**REVIEW DOCUMENTS** 





Click 'FINISH' when completed.



\* See P.12 for signing instructions



# Authorized signature

For Second Authorized Signer (Optional)

**13** 

Second Authorized Signer will receive an email after the first Authorized Signer had completed the form. Click 'REVIEW DOCUMENT' to sign the form.

American express corporate card Program via Docusign





American Express® Corporate Card Application 美國運通公司卡會員申請 - Ben Lee

To: Herrick Chan,

Reply-To: American Express Corporate Card Program





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

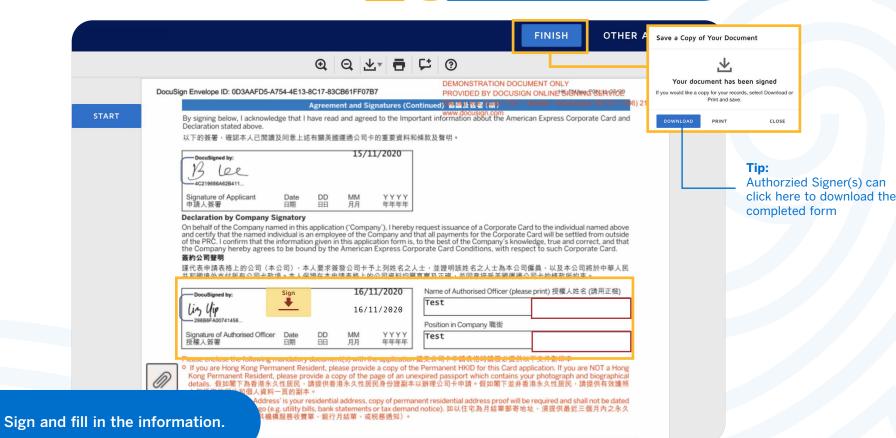
**REVIEW DOCUMENTS** 



### Authorized signature

For Second Authorized Signer (Optional)

Click 'FINISH' when completed.

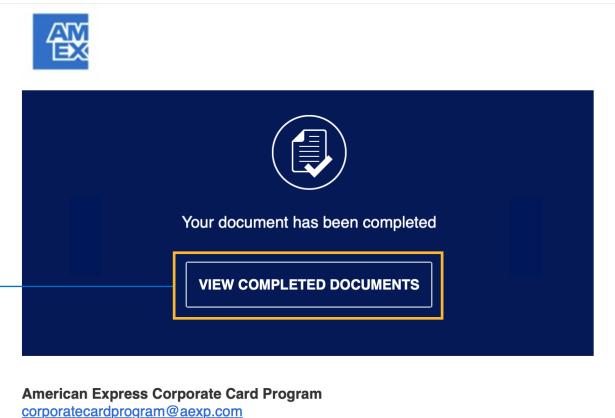


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# Completed application

The completed form will be automatically sent to our Amex mailbox after all parties had signed and submitted the application.



#### Tip:

Once our team received and start viewing your completed form, a notification email will be sent to all parties (Program Administrator/ Application Initiator/ Card Applicant/ Authorized Signer(s))

You can click here to view the completed form

# **Frequently Asked Questions**

- 1. What is the new Card Application process and what are 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 <a href="https://www.docusign.co.uk/products/electronic-signature">https://www.docusign.co.uk/products/electronic-signature</a>
- 3. Is the digital application mobile or tablet friendly?

  Yes, the application can be accessed on **desktop**, **mobile and tablet devices**.
- 4. 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® Cathay Pacific Elite Corporate Card, American Express® Corporate Meeting Card and American Express® Corporate Purchasing Card.

- Who do I contact if I need assistance?
   If the Program Administrator has questions, they can contact the American Express PA Servicing Team.
- 6. Once the process is initiated, how long do I 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.

- 7. If I save my application for later, how do I access my application again?
  - After you click '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.
- 8. What happens to my application if the Authorized 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 Authorized Signer completes the application.

# **Frequently Asked Questions**

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

Once PA finished their part and send the form to Cardmember, there will be a link to the application sent to PA via email, so PA can check on the form's progress.

### 10. 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.

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

Yes, reminder emails will be sent to signers to remind them to complete the form.

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

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

13. 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.

