

American Express @ Work[®] Global Apply for Card

USER GUIDE FOR AUTHORISED SIGNATORIES / PROGRAM ADMINISTRATORS



DON'T *do business* **WITHOUT IT**™



CONTENTS

**THIS DOCUMENT IS FULLY INTERACTIVE. CLICK ON LINKS
WITHIN EACH PAGE TO NAVIGATE BETWEEN SECTIONS.**

Global Apply For Card Overview

WHAT IS AN ACCESS KEY?

CREATING AN ACCESS KEY

WHICH EXPERIENCE SUITS YOUR BUSINESS NEEDS?

NAVIGATING CRITICAL FUNCTIONS

HOW TO ENROL

Global Apply for Card Experience

INITIATING A CARD APPLICATION

APPROVE A CARD APPLICATION

TRACK A CARD APPLICATION

CARD APPLICANT EXPERIENCE

Frequently Asked Questions



Checklist

> What is an Access Key?

> How to enrol

> Navigating critical functions

⊗ DECIDE WHO SHOULD HAVE ACCESS TO GAFC

 Individuals with access to Global Apply for Card (GAFC) will be responsible for ensuring the correct journey is created within @ Work to suit their individual business needs in relation to Card Applications. They may not necessarily have to approve Card applications, but know who the Authorising Signatories are for their Company and assign applications to them.

 It is possible to customise the journey from initiating the Card Application through to how the applications are approved before submitting to American Express. See **Selecting the right process journey** for further details.

 We do recommend that you have more than one individual with access to GAFC and the same Control Accounts. This enables Access Keys and tracking of Card Applications easier as everyone will have the same ability to manage these in the system.

 Having multiple people with the same access also allows for the process to continue even when the Authorised Signatory(s) are out of the office for an extended period of time.

 See **How to Enrol** for further details.



Checklist

⊗ DEFINE YOUR APPLICATION PROCESS

✓ Do you require approval for a Card Application before or after it has been completed by an Applicant?

👤 How many individuals needs to be involved in the end to end application process? Can you streamline the number of touch-points?

- ⊗ i) Do you want Card Applicants to initiate their own applications and you simply approve them once complete? **Access Keys** will suit you.
- ⊗ ii) Do you want to initiate applications each time without the need to set up an Access Key? **Quick Send** might suit you.

> What is an Access Key?

⊗ How many pre-approvers are required? Do you want to select them or allow the Applicant to nominate during the form process? See '**What is an Access Key?**'

⊗ See the sections on **Access Keys flows** which can help you set up a process with low touch-points but still meet your minimum company approval regulations.

> How to enrol

⊗ Do you require pre approval or post approvals on your process?

> Navigating critical functions

👤 How many individuals need to be involved in the process?

👤+ Ensure you have two individuals with access to the online system in case of unplanned absences etc.



Checklist

⊗ **DECIDE HOW EMPLOYEES WILL ACCESS THE APPLICATION FORM**

There are two options for how a Card Applicant (Employee) can access application forms:

1. You can initiate it via @ Work either by setting up an **Access Key** or **Quick Send** features.
2. Employees can initiate their own application and the system will follow the process you have established for approvals.

> What is an Access Key?

See which experience suits your **business needs**.

For Employee initiated Applications you need to decide how to communicate this, either:

 Provide the **Access Key** via their Manager or their Program Administrator.

> How to enrol

 Publish the **Access Key** internally e.g. on a Company intranet.

> Navigating critical functions



Checklist

⊗ WHAT IS AN ACCESS KEY?

⌘ The Access Key defines fields and the process your Card Applications for a specific BCA will follow with no limit to the number of variations these Keys may have.

> What is an Access Key?

> How to enrol

> Navigating critical functions



THE ACCESS KEY CAN BE CREATED TO DETERMINE IF:

- What approvals are required when and by whom e.g. Team Leader to approve the application before the Employee receives the form and you need to approve it in @ Work once complete before it goes to American Express.
- There are specific individuals involved with the approval process where you can nominate their email address to ensure the application does not proceed further in the journey until that person has approved.
- Mandatory information is to be captured on the application form, such as Employee ID or Cost Centre and how many characters must be captured to be correct.



BENEFITS OF AN ACCESS KEY:

- Multiple **Access Keys** can be created for the same BCA allowing different options such as application fields and process preferences.
- You can quickly initiate multiple Applications with the same **Access Key**.
- You can publish the **Access Key** and Application Site URL for your organisation on your Company's Intranet.
- Tighter controls to manage Card applications with reduced manual administration.
- You can easily view all Applications and their status under specific **Access Keys** for tracking.



Checklist

⊗ **CREATE ACCESS KEYS**



This is a one time set up and identifies which application form, fields and approval process the Employee will complete before the application is sent to American Express. For more details see '[What is an Access Key?](#)'

See the process options available for [Access Keys](#).



Do you need an [Access Key](#) for a whole Department or for each Team Leader? For example: One access key for the Sales Team and another for Procurement as they have different approvers or Card products.



Be sure to name the [Access Key](#) so it is easily identifiable for which Department or Team Leader they are linked to.



Do you require one Access Key per Department or one per Team Leader?



PAs with the same Account access will be able to view and edit Access Keys created by other PAs.

Review steps on [Creating an Access Key](#).

> [What is an Access Key?](#)

> [How to enrol](#)

> [Navigating critical functions](#)



Checklist

⊗ **TRANSITIONING YOUR ORGANISATION TO THE NEW DIGITAL SYSTEM**

You may wish to leverage the communication and Intranet notification documents on our @ **Work Resource Centre** that have been created to help advise your Organisation of the new digital Card application process.

- ☑ Ensure Approvers understand that the automated emails from American Express are from a trusted source and ensure Company firewalls accept them without issue.

> What is an Access Key?

> How to enrol

> Navigating critical functions



Checklist

 **HOW TO ENROL**

 Complete the @ Work digital enrolment form <https://atworkenrollment.americanexpress.com/> select 'Online Card Applications (Apply for Card)' and follow the prompts

 Call our Servicing Centre and request to be enrolled to 'Global Apply for Card':

Australia: 1300 655 300

From Overseas: (+61) 2 9271 8722

Operating hours: 7.30am-7pm Monday - Friday AEST

> What is an Access Key?

 castsyd@aexp.com

 We also have Client Trainers who are ready to discuss with you how to get the most out of GAFC for your Organisation. There is no fee for this service which is available for all @ Work enrolled Customers. Contact your Account Manager or call PA Servicing to arrange a convenient time with one of our Trainers.

> How to enrol

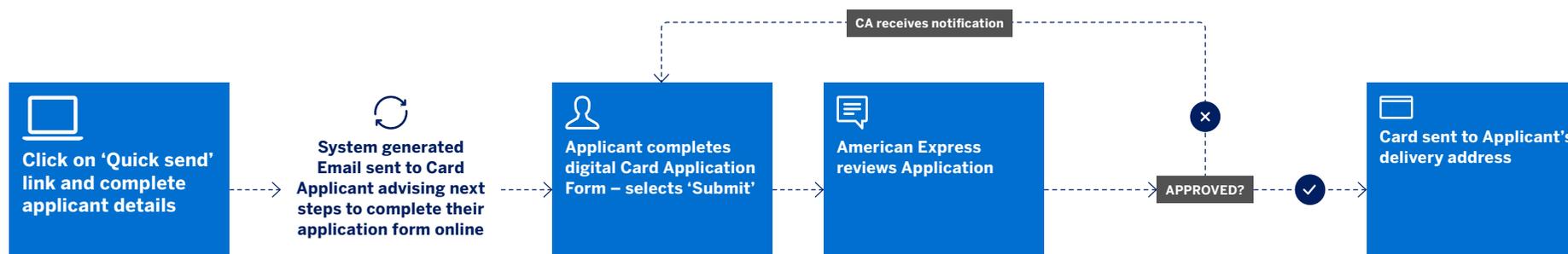
> Navigating critical functions



Global Apply for Card Journeys

The Quick Send link can be found on the “To Do” section. By selecting this you have effectively ‘approved’ the application and it will automatically be routed to American Express once the Applicant has completed the form.

QUICK SEND

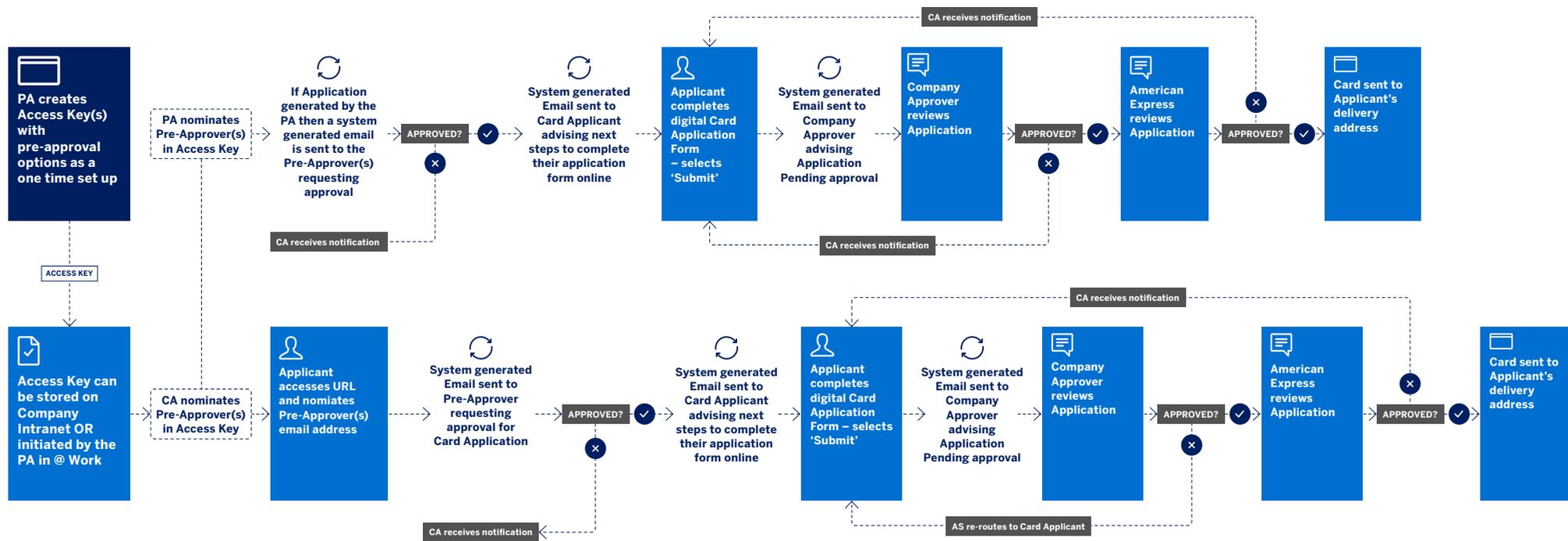


AS = Authorised Signatory
PA = Program Administrator
CA = Card Applicant

Global Apply for Card Journeys

Access Keys can be set up with either the ability to pre-approve applications before the Employee completes them and/or to occur after the application has been completed. Card Applicants can also nominate who needs to approve their application before they complete the form.

PRE-APPROVAL ACCESS KEY



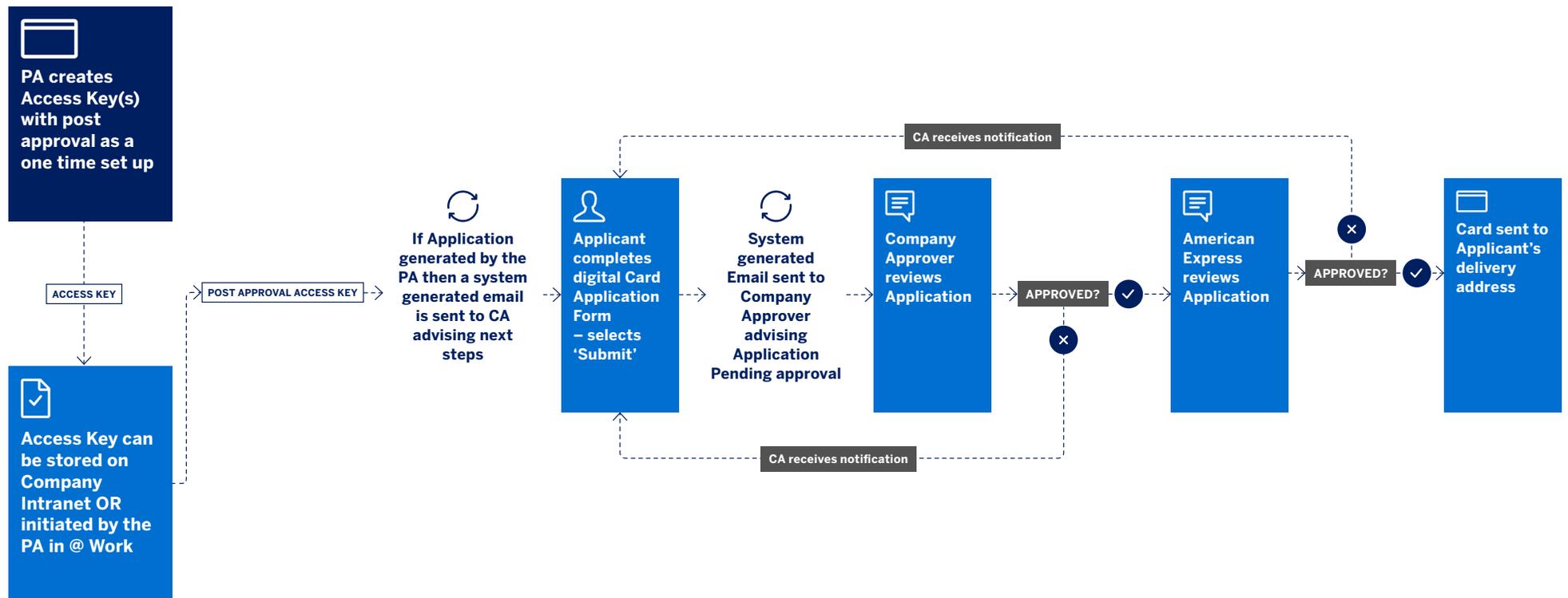
AS = Authorised Signatory
 PA = Program Administrator
 CA = Card Applicant



Global Apply for Card Journeys

An Access Key can be created which requires the Card Application to be approved once the Applicant has completed the form. This is the final step before the system sends the form to American Express for processing.

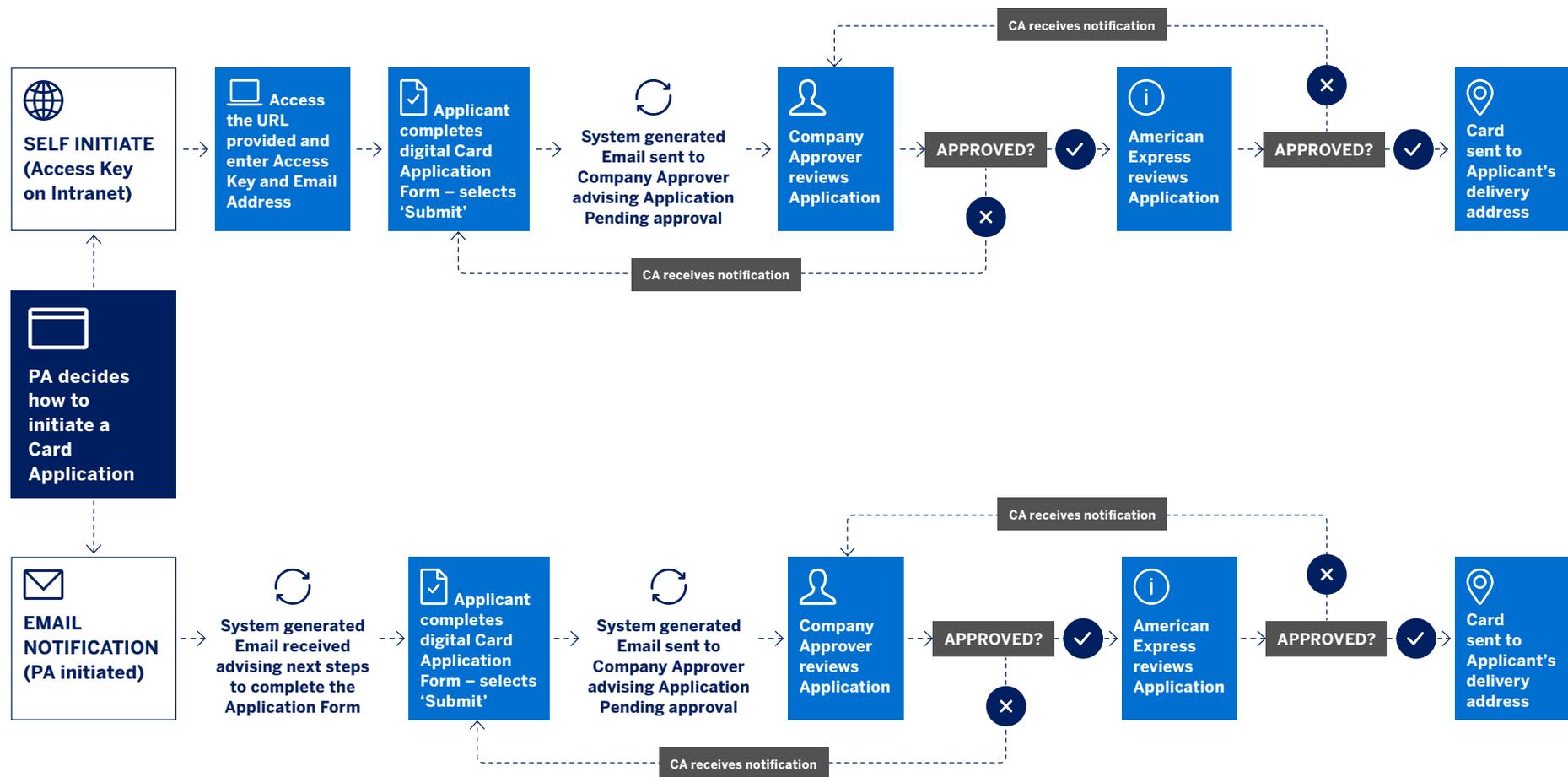
POST APPROVAL ACCESS KEY



AS = Authorised Signatory
 PA = Program Administrator
 CA = Card Applicant

Which experience suits your business needs?

Program Administrators can choose to initiate Card Applications each time, or they may publish the Access Key and Card Application URL on their Company Intranet so they need only approve applications as required. **Card Applicants** can self-initiate Card applications by using the URL and Access Key provided by the Program Administrator.



AS = Authorised Signatory
 PA = Program Administrator
 CA = Card Applicant

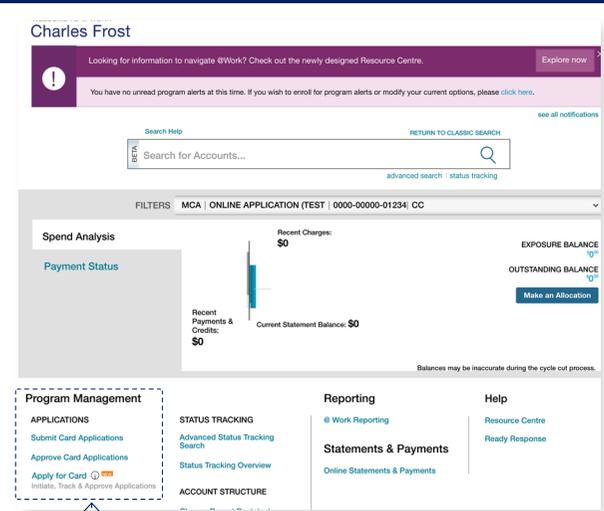
Navigating critical functions

Navigate to the relevant screens to initiate the most critical tasks quickly and easily.

✓

EASILY ACCESSIBLE

Click on the action on the **@ Work Homepage** to link directly to the related screen.



Program Management

- APPLICATIONS
- Submit Card Applications
- Approve Card Applications
- Apply For Card NEW
- Initiate, Track & Approve Applications

These additional links will only appear if you are enrolled to the existing digital solution.

1

CREATE ACCESS KEYS

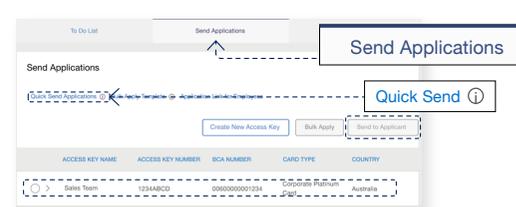
Within the **Send Applications** tab, select **Create New** to start creating the process for all your Applications*.



2

INITIATE APPLICATION

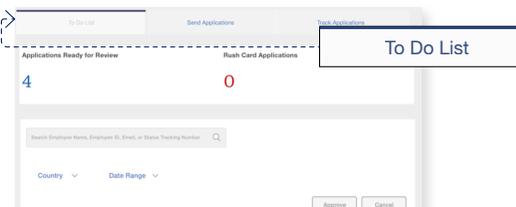
In the **Send Applications** tab, you may choose the link to **Quick Send** or select a specific **Access Key** then **Send to Applicant**.



3

APPROVE APPLICATION

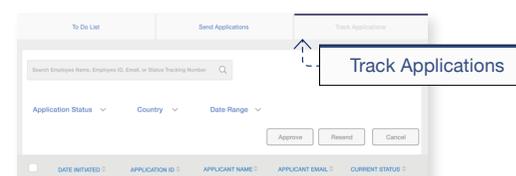
To Do List tab lists all your Applications including Priority ones for you to quickly **approve, re-route** back to Applicant or **cancel**.



4

TRACK APPLICATION

Selecting the **Track Applications** tab enables you to view all Card Applications and their status in the process.



Creating an Access Key

An Access Key will enable you to mandate fields, select field length and set other constraints on all Card Applications initiated using this Key.

1 SELECT BASIC CONTROL ACCOUNT

Within the Create **New Access Key** screen, start typing for suggested results or select from the drop down the BCA you wish to use.

Enter 'Create Access Key' Details

BASIC CONTROL ACCOUNT

Select
▼

Cancel
Continue

2 CUSTOMISE ACCESS KEY

Type a unique **Access Key Name** for and select the constraints you wish to have appear for all Applications associated with the Key.

Enter 'Create Access Key' Details

BCA Number 000000000001234	MCA Name ONLINE APPTST - T&E	Country AUSTRALIA
Basic Control Account ONLINE APPLICATION TEST	Liability Type LIMITED	Billing Option INDIVIDUAL
Card Delivered To INDIVIDUAL		
DETAILS		
ACCESS KEY NAME Australia Procurement Team1	CARD TYPE Corporate Green Card	

3 + 4 REVIEW & CONFIRM

Ensure all details are correct and select **Submit** then **Confirm**. Your Access Key is now ready to use.

ACCESS KEY NAME Australia Procurement Team1	CARD TYPE Corporate Green Card	
EMPLOYEE ID <input checked="" type="radio"/> Yes <input type="radio"/> No	COST CENTRE <input checked="" type="radio"/> Yes <input type="radio"/> No	ALLOW RUSH CARD <input type="radio"/> Yes <input checked="" type="radio"/> No
LENGTH Any (1-10)	LENGTH Any (1-10)	
Customise Approvals		
How should approvals work for this Access Key?		
<input type="radio"/> I'll assign approvers for the Card Application.		
<input type="radio"/> The Card Applicant will assign managers or leaders who need to approve the Card Application.		

Initiating a Card Application

Select either Quick Send or click on the Access Key you wish to initiate the Application form.

✓ **FLEXIBLE INITIATION PROCESS**
 Select a quick **initiation of Application** or select an Access Key then click on **Send to Applicant** button.

Quick Send will mark the Application as already approved by the Initiator and includes default preferences. In Australia, India, Mexico, Singapore and Japan the Initiator must be the Authorised Signer. Post Approver is required in the IEC and Japan markets.

close

1 **ENTER EMPLOYEE DETAILS**
 Enter the **BCA number (if Quick Send)** and/or relevant **Employee contact details** including email address.

2 **REVIEW & SUBMIT**
 Ensure all details are correct before clicking **Submit**.

3 **REVIEW & CONFIRM**
 The system will confirm the Application ID and automatically send an email to the Applicant so they can complete the form.

Initiating Multiple Applications

Initiate up to 3,000 applications at the one time to fast track Card in hand for large groups of Employees and reduce administration time.

1 DOWNLOAD THE TEMPLATE

Access the template and enter up to 3,000 Applicants by row. Follow the example provided as any changes to the template may prevent the system accepting the file.

The screenshot shows the 'Send Applications' interface. A dashed box highlights the 'Bulk Apply Template' link in the top navigation bar. Below it, a modal window titled 'Bulk Issuance' is open, showing instructions for downloading the template and a 'Download' button.

2 UPLOAD THE FILE

Select the appropriate Access Key, then click 'Bulk Apply', follow the steps to upload the finalised document.

The screenshot shows the 'Send Applications' interface. A dashed box highlights the 'Bulk Apply' button in the top navigation bar. Below it, the 'Upload Template' section is visible, showing a 'SELECT FILE' button and a 'Next' button.

3 + 4 REVIEW & CONFIRM

Once the template is uploaded successfully, you can preview the first 10 rows before submitting. Employees will receive an email advising next steps to complete their application.

The screenshot shows the 'Bulk Application Preview' page. It features a table with the following data:

FIRST NAME	LAST NAME	EMAIL ADDRESS	EMPLOYEE ID	COST CENTER
SampleFN	SampleLN	sample@test123.com	1	1
Charles	Frost	charles@company.com	5	5
Emily	Tan	emily@company.com	5	5

At the bottom of the page, there are 'Back' and 'Next' buttons.

Approve a Card Application

Once reviewing a summary of the Application, you can choose to approve, route it back to the Card Applicant for further details or cancel (decline) to proceed with the Application.

1 REVIEW APPLICATION
 Select the **Arrow** on left of the Application to see summary.
 At the top the number of **Applications Ready for Review** and **Rush Card** (urgent) **Applications** will appear. Rush Card only available in Australia at this time.

Applications Ready for Review
Rush Card Applications

56
1

<input type="checkbox"/>	DATE INITIATED	APPLICANT NAME	APPLICANT EMAIL	CARD TYPE	APPROVAL TYPE
<input type="checkbox"/>	2019-11-21	Ted Test	test@company.com	Corporate Platinum Card	Rush
<input checked="" type="checkbox"/>	2020-03-07	Sally Sample	sample@company.com	Corporate Platinum Card	Standard

APPLICATION ID AU-0000000123	RESIDENTIAL ADDRESS 2222222 23232332 248	ACCESS KEY NAME SALES TEAM	EMPLOYEE ID 1111111
NAME ON CARD SALLY SAMPLE	BCA NUMBER 000000000123456	BCA NAME 12345abcde	COST CENTRE 111111111
MOBILE PHONE 0222222333	BILLING ADDRESS 2222222 wdfwf 036	MCA NUMBER 000000000123456	DATE OF BIRTH 1999-12-12
EMAIL sample@company.com	CARD DELIVERY ADDRESS 2222222 wdfwf 036	MCA NAME COMPANY TEST	BILLING & STATEMENT DELIVERY Business Address

Approve
 Cancel
 Edit
[Route To Applicant](#)
[Change Delivery Speed](#)

File Attachments

[Passport](#)

2 CHOOSE YOUR ACTION
 Select from one of the actions to the right of the Application summary.
 You may also **view the Applicant's attachments**.

Approve
 Cancel
 Edit
[Route To Applicant](#)
[Change Delivery Speed](#)

3 REVIEW & CONFIRM
 A pop up will ask you to confirm your selection. This change to the Application will be reflected in the **Tracking Status** screens.

Approve Applications

Would you like to approve the following Card Application?

APPLICANT NAME	EMAIL	APPLICATION ID
Charles Frost	cf@company.com	AU-00000000123



Track a Card Application

The list displays all Card Applications so you can view where the Application is in the process.

1 VIEW APPLICATION LIST

In **Track Applications** tab you can view all Applications at a glance and their **Current Status**.

By selecting the relevant check box(es) you can also **resend the notification email** to the Applicants. If necessary, you can also amend multiple Applicants' email addresses before resending.

Back to @ Work Home

To Do List Send Applications Track Applications

Search Employee Name, Employee ID, Email, or Status Tracking Number

Application Status Country Date Range

2020-07-17 → 2020-10-15 X

Approve Resend Cancel

<input type="checkbox"/>	DATE INITIATED	APPLICATION ID	APPLICANT NAME	APPLICANT EMAIL	CURRENT STATUS
<input type="checkbox"/>	> 2020-10-14	AU-000000001234	Charles Frost	cf@company.com	Sent to Employee
<input type="checkbox"/>	> 2020-10-13	IN-000000005678		test@hdfhdhd.com	Sent to Employee

2 VIEW STATUS OF APPLICATION

Multiple statuses for Applications are available to help you identify where there might be delays occurring and who you could follow up with to move along the process.

Application Status ^

- Application Expired
- Approved by Amex
- Cancelled by Amex
- Declined by Amex
- PA Declined
- Pending Amex Approval
- Pending PA Review
- Pending Pre-Approver
- Pre-Approver Cancelled
- Sent to Employee



Track a Card Application (cont.)

If you nominated Pre-Approver(s) in the Access Key, you can track their approval status.

3 VIEW APPLICATION LIST

All Pre-Approvers must complete their approvals before the Applicant will be able to complete the form. You can resend emails to these Pre-Approvers as required.

<input type="checkbox"/>	DATE INITIATED	APPLICATION ID	APPLICANT NAME	APPLICANT EMAIL	CURRENT STATUS
<input type="checkbox"/>	2020-10-14	AU-000000001234	Charles Frost	cf@company.com	Sent to Employee

BCA NUMBER	CARD TYPE	EMPLOYEE ID
00000000012345	Corporate Green Card	123



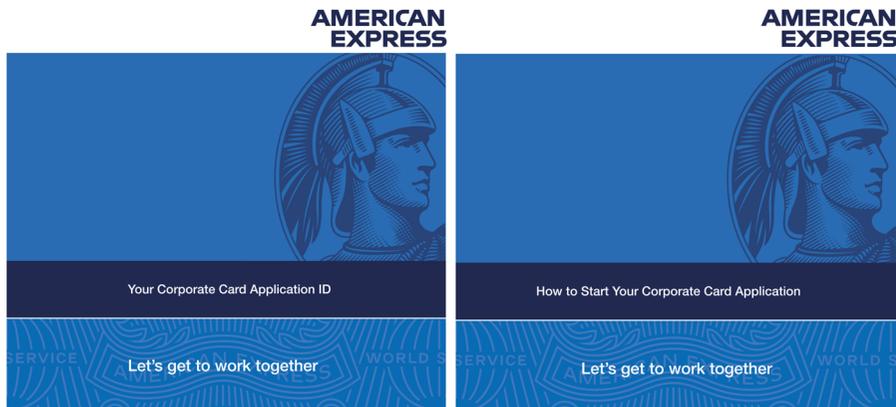
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Card Applicant Experience

Upon receipt of emails from American Express, Applicants simply log in using the link and Application ID provided. Applicants may also use the URL and Access Key posted on their Company's intranet and go straight to Step 2 as emails won't be triggered from @ Work by the Program Administrator.

1 APPLICANT EMAILS

Once the application has been initiated, two emails are generated by American Express to the Applicant containing an Application ID and link to URL.



Hello TED TEST,
Good news! Your company has authorised you to apply for an American Express® Corporate Card.
Soon, you'll receive an email with a link to start your application. In the meantime, here's your Application ID, which you will need to complete the application process:
Application ID: AU-0000000
If you no longer wish to apply for a Corporate Card, please contact your company's Programme Administrator to cancel your application.
We look forward to serving you,
American Express Global Commercial Services

Hello TED TEST,
Now that your company has authorised you to apply for an American Express® Corporate Card, please use the link below to access and complete your Card application:
[Access your secure application](#)
To start your application, please have your APPLICATION ID on-hand, which we sent you in a separate email.
If you no longer wish to apply for a Corporate Card, please contact your company's Programme Administrator to cancel your application.
We look forward to serving you,
American Express Global Commercial Services

2 LOG IN TO APPLY

Applicants enter their email address, Application ID or Access Key to access the application

3 NOMINATING APPROVERS MAY BE REQUIRED

If the Program Administrator has opted for Applicants to enter Card application approvers this screen will appear. Applicants enter email address(es) of individuals who must approve before the form can be completed.



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Card Applicant Experience

Applicant completes all fields, uploads mandatory identification documentation, accepts terms and conditions before submitting the final version.

1 BEFORE YOU BEGIN MESSAGE

Applicants to carefully review this message to ensure all supporting documentation is correctly supplied before starting the application process.

Important Information Before You Begin

 Welcome to your American Express® Corporate Platinum Card Application!

Card Applicant
Before Completing the Application Form below, please read this important information to ensure this application is completed correctly and to limit processing delays.

- > [How to provide a valid copy of ID](#)
- > [How to certify your Documents](#)

[Learn More about the Verifying Officer and Certified Signatory roles for Identity Verification.](#)

[Continue](#)

2 COMPLETE THE APPLICATION

Complete the fields required - ALL ARE MANDATORY.

Applicant Information

First Name: TED, Last Name: TEST, Date of Birth: 12-12-1990, Address: 123456, Sydney, Australia.

Company ONLINE APPLICATION TEST

Company Name: TEST, Country: Australia, State: New South Wales, City: Sydney.

Supporting Documents

Document Type: Select, Add additional document.

3 TRACKING ID

Retain this unique reference number for your records.

Confirmation

Thank you! Your digital application has been submitted. Your Application ID is: AU-00000000692

[Close](#)

Important Information

We may need supporting documents from you and will contact you if we do. [Learn More about the Accepted documents.](#)

Privacy Statement

It is important that you understand how we will use your personal information in connection with your application. Please click [Privacy Statement](#) for a full explanation.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



OVERVIEW

1. How do applicants access their Card Application?

There are two ways to access a Card application:

A. Access Key and a URL Link

- i Your PA may provide you with a link to the application site and an Access Key.
- ii Your Access Keys may be posted on your Company's internal intranet site.

B. Email Invitation

- i Applicants will receive two emails from American Express, initiated by their Program Administrator via @ Work, inviting them to apply for a Corporate Card.
- ii One email will contain a link to the application site, the other an Application ID to use as a key to log on and complete the application.

Once on the Card application site, Card Applicants will be instructed to enter their corporate email and Application ID or Access Key and begin their journey to complete their Corporate Card application.

2. What Card products are available in Global Apply for Card for Customers to use?

Travel and Entertainment Cards; Platinum, Gold, Green and Co-Brand. Corporate Purchasing Card (CPC) and Corporate Meeting Card (CMC) are also available.

3. Is GAFC mobile or tablet friendly?

GAFC will respond to and function on smaller screen resolutions like tablet and mobile, however, we don't have a separate mobile only application.

4. When the Embossed Company name is on the Card, where does it draw from?

The system pulls the embossed company name on the Card from your American Express Control Account details.

5. Who do I contact if I need assistance?

In the event of any errors or additional questions, you can contact the American Express PA Servicing Team.

If a request wasn't processed successfully, the PA will receive an error message that states they need to try their request again.

Card Applicants are first directed to PA's if they need assistance.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



HOW CARD APPLICANTS RECEIVE APPLICATIONS TO APPLY

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

Yes, The Card Applicant needs only the Access Key and URL to initiate the process.

You can store the Access Key (unique) and Application URL (common) via your internal Intranet or internal process. If the Access Key requires a pre-approval, the Card applicant will enter their contact information to kick-off the pre-approval process. The PA will always need to review applications completed in this fashion to ensure proper controls for your Card Program are in place.

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

PA's can send up to 10 applications at a time using the 'Send to Applicant' function in the 'Send Applications' tab. Or PA's can use the 'Bulk Apply' template and function in this tab to initiate up to 3,000 applications at the one time.

In both instances, the system will create a unique Application ID for each Applicant that is automatically delivered to them via emails from American Express.

Tracking of the applications, regardless of how they are initiated, can be followed in the 'Track Applications' tab.

3. Once sent to the employee, how long do they have to complete an application?

Applicants will have 45 days to complete their application prior to it being cancelled by the system.

4. Are there any notifications sent to applicants to remind them to complete online?

The Card applicant will receive an email reminder to complete any non-started or pending application 3 days after application initiation, then every 10 days until the application is cancelled at 45 days.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



ACCESS KEYS

1. What is an Access Key?

An Access Key is a unique code, created in @ Work, and each one is associated with a Basic Control Account (BCA) for your company. The Access Key carries information about the BCA set up such as Product, Billing, and Liability Type, to the Card application. PA's can mandate Cost Center, Employee ID and even the length of the fields required.

2. How do I create an Access Key?

PA's create an Access Key in the 'Send Applications' tab with a few simple steps:

- a. Click 'Create New Access Key' on 'Send Applications' Tab
- b. Choose the BCA for the Access Key
- c. Set the options you would like associated with the Access Key (see below)
- d. Confirm and Create!

3. Are there any fields I can mandate in the application?

Yes, if you want to require that applicants enter their Cost Center, Employee ID on Applications, including the length of the fields required, check the boxes for these items during the Access Key set-up process.

4. Does each PA need to set up their own Access Keys?

Not at all! All PA's with permissions for a BCA will have full visibility to manage and use Access Key's created for those BCA's. You may only need one Access Key for each BCA. If a BCA has both Gold and Green Cards associated to it, you will need one Access Key for Gold and one for Green.

If you prefer you can create multiple Access Keys for a BCA if there are different Department and/or Approver combinations required. These Access Keys can be leveraged by all PA's responsible for those departments and approvers.

5. How many Access Keys can a PA create?

There is no limit to how many Access Keys can be created for each BCA or by each PA. Developing consistent naming conventions and internal workflows will help your organisation optimise the number of Access Keys created.

6. Are Access Keys required to initiate applications?

No, not always. To initiate an application without an Access Key, the Authorised Signatory can select the 'Quick Send' option to send application(s).



Frequently Asked Questions

American Express @ Work® Global Apply for Card



ACCESS KEYS

7. When does an Access Key expire?

Access Keys don't expire. However, if the PA who set up the company moves to a new role, or leaves the company, we recommend an active PA edit the Access Key to ensure all notifications stay within the group. We always recommend at least 2 PA's register for GAFC to ensure all roles can be completed any time.

8. Is there a limit to the number of applications for each Access Key?

There is no limit to the number of applications issued for any Access Key.

9. If we add new PA's, will they be able to see existing Access Keys by default?

Yes, provided the new PA's are set up with permissions at the same BCA level, new PA's can access, use and maintain the Access Keys.

10. Do Access Keys expire in GAFC?

No, there is no expiration date for GAFC Access Keys.



HOW DO THE APPROVAL ROUTINGS IN THE ACCESS KEYS WORK?

1. For Applications including Pre-Approvers, will the Approver receive an email alert in real time?

Yes, the Approver will receive an email within 15 minutes, and they can decision whether an employee is eligible to apply directly from the email, without needing a @ Work ID.

2. What Approval options are available?

When setting up the Access Key the User can choose either:

- **Pre- and Post-Approval**, where a Pre-Approver (e.g Line Manager) approves the application prior to being sent to the Employee and a Post-Approver (Authorised Signer) reviews and approves the completed application.
- **Pre-Approval**, where only a Pre-Approver (must be an Authorised Signer) approves the application. Once the applicant completes the application, it will be routed to American Express for processing.
- **Post-Approval**, where there is no Pre-Approver, and the Authorised Signatory reviews and approves the completed application prior to submission.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



HOW DO THE APPROVAL ROUTINGS IN THE ACCESS KEYS WORK?

3. Do Post-Approval applications go to the Authorised Signatories automatically?

What happens when there is more than one Authorised Signatory?

Once completed, applications requiring Post-Approval appear in the To Do List tab for all Authorised Signatories with GAFC permissions under that BCA.

In addition, the PA who last edited the Access Key will receive an email notification that they have an application to review.

4. What is Quick Send and when should I use it to initiate applications?

Quick Send allows the Authorised Signatory to quickly initiate an application to an employee in the fewest possible steps.

- a. Simply select a BCA and enter the employee's first name, last name, and email, then review and submit.
- b. No Access Key is required.

Use Quick Send when you want to quickly provide a Card to an employee without the need for an Access Key.

5. How many Card Applications can a PA/AS initiate at one time?

PA's can send up to 10 applications at a time using the 'Send to Applicant' function in the 'Send Applications' tab or via the Quick Send link on the 'Send Applications' tab.

PA's can also use the 'Bulk Apply' template and function in this tab to initiate up to 3,000 applications at the one time.

In both instances, the system will create a unique Application ID for each Applicant that is automatically delivered to them via emails from American Express.

Tracking of the applications, regardless of how they are initiated, can be followed in the 'Track Applications' tab.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



APPLICATION TRACKING

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

The PA can view applications in the 'Track Applications' tab for any particular individual in the system.

2. What are the different status' for applications in Global Apply For Card?

Global Apply for Card Status include:

- Sent to Employee
- Pending Pre-Approver
- Pre-Approver Cancelled
- Pending PA Review
- PA Declined
- Pending AMEX Approval
- Approved by AMEX
- Cancelled by AMEX
- Declined by AMEX
- Application Expired

3. Can the PA review the Pre-Approval status? If so where can the PA view this before Post Approval?

Yes, all Application status' are tracked in the 'Track Applications' tab – even those that have been self-initiated by the Card Applicant. If there is a Pre-Approver, once they approve the application, the status will move to 'Sent to Employee'.

4. If an Authorised Signatory cancels or rejects an application, will an email generate to the applicant? Is this real time?

Yes, the applicant will receive an email notification advising that the company has declined/cancelled their application within 15 minutes.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



APPLICATION REVIEW AND APPROVAL

1. How will a PA know when they have applications to review?

The PA who setup or last edited the Access Key will receive an email notification that there is a completed application to review.

When any PA logs onto Apply for Card, they will see applications to review and approve in the To Do List.

2. What kind of actions can a PA/AS make on a Card Application being reviewed?

PA/AS can make the following actions on Card applications pending approval:

- **Change delivery address** from Residential to Business (unless company is set up on central card delivery).
- **Edit** some of the non-PII information on the application such as Employee ID or Cost Center.
- **Route the application back to the applicant** to correct fields with errors and include a note with details on what the applicant needs to correct.
- **Approve or Cancel applications** one at a time or all at the same time.

3. What happens when a PA re-routes the application back to the applicant for edits?

When the PA routes the application back by selecting the link that says, 'Route back to Applicant', the PA can enter comments as to why they are routing it back, and the applicant will receive the details in an email.

The applicant then logs in again using the details in their email, fix the errors, and re-submit to the PA for review. During this 'reroute' the status in 'Track Applications' will return to 'Sent to Employee' as the Card application is pending with the employee.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



CARD APPLICATION/CARD DELIVERY

1. Are there mandatory fields on the application and will the Applicant know there is an error with their application?

Yes, Applicants will be notified which fields are mandatory while they are completing the online Application. If there are any errors, messages will appear prompting the individual to provide more information or correct their entries.

2. Can different Card delivery address locations be managed by creating another Access Key for the same BCA?

There is not an option within Access Key Details to select Card delivery options.

If Central Card Delivery is designated in the American Express system for that Account, their Card will be delivered to the Business Address.

If Central Card Delivery is not designated in the American Express system for that Account, the Applicant is advised that their Card will be delivered to the address they selected as their Statement/Billing address.

3. What are the Card delivery address options for applicants?

Unless your company has arranged to distribute Cards centrally, the applicant can select either their Home or Company address for Card delivery.

4. Is there any flexibility for PA's to select the Card to be delivered to the Card Applicant if the current arrangement is configured to Central Card Delivery?

Not currently. This is on the Roadmap for a future enhancement so keep an eye out for updates.

5. How do Applicants submit completed applications?

Once Applicants have completed all mandatory fields in the application, they will reach a review and submit screen. There they can review and modify fields if necessary.

Once finalised Applicants accept the Terms and Conditions and click the Submit button. A screen will then appear confirming that your application has been submitted.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



IDENTITY DOCUMENT

1. Are identity documents required?

An Applicant may need to lodge a certified copy of a primary photo identifying document such as a passport or drivers licence. If this is required the Applicant will be contacted by American Express.

2. How do Applicants upload documents?

If a document is required the Applicant can attach and upload via the Supporting Documents section of the application.



Frequently Asked Questions

American Express @ Work® Global Apply for Card



RUSH CARD

1. How do we manage the Rush fee if the Company direction is to not allow?

During the set-up of the Access key, the PA won't select the checkbox that states 'Allow Rush Card Delivery'. This will ensure the applicant can't select this option at all. This can also be done if the PA decides to use Quick Send option.

2. Can applicants choose to Rush their Card delivery?

If your company allows this, they'll enable the selection to Allow Rush Card Delivery on their application.

If the applicant selects Rush Card Delivery they must confirm:

- acceptance of the Rush Card delivery costs,
- delivery Address: Home, Company, or Other

Rush cards cannot be sent to PO Boxes or Non-Australian Addresses.

3. How quickly is a Rush Card received?

Rush Cards are sent 1-2 days after approval.

4. Will the PA be notified of the fee associated with the Rush Card Delivery selection in the initiate process?

All Rush Card Delivery requests incur an additional fee. The PA is only notified of the fee if they select to Change to Rush Delivery in the 'To Do List'. If the PA allows the applicant to select Rush Delivery via Access Key set up, there is not a PA notification of the fee, but the Card Applicant will be advised of the fee during the application process.

For Post-Approval Applications, the PA can always change the Rush Card Status to or from Rush prior to final approval.

