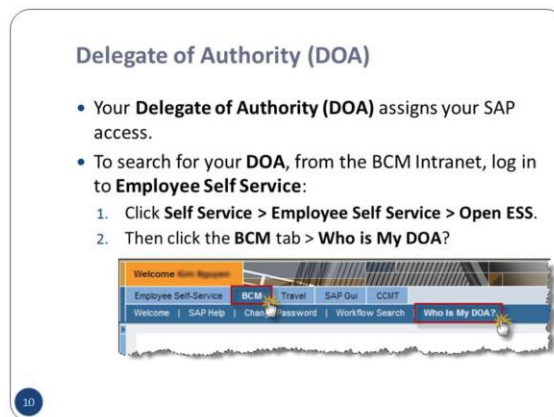


Corporate Card Online Account Request Instructions

It is necessary to have your **Employee ID, Delegate of Authority (DOA, also your Department Administrator), and Office Address** available prior to completing the application. The DOA will confirm the business justification and approval for card. Each application will then be reviewed by the Card Administrator to ensure the applicant meets the qualifying criteria to hold a Corporate Card. Upon completion, Bank of America will send the Corporate Card directly to the applicant's office address.

Don't know your DOA? You can find this by logging into Employee Self Service (ESS) on the BCM Intranet.

- Go to intranet.bcm.edu, click Self Service > Employee Self Service > Open ESS
- Go to the BCM tab once logged into ESS and click "Who is My DOA?"

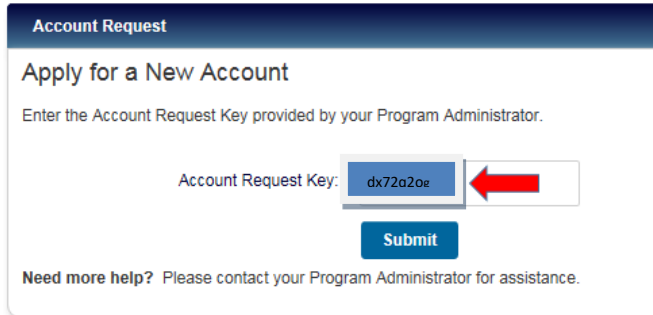


Note: The Corporate Card online account request process is only for **new** card applications and is not to be used for lost/stolen or replacement cards. Please call the Bank of America customer service number at 888.449.2273 for assistance in these areas or contact the Card Administrator, cardadmin@bcm.edu.

To Access the Online Account Request:

Go to: www.bankofamerica.com/accountrequest

- Enter Account Request Key **dx72q2og**

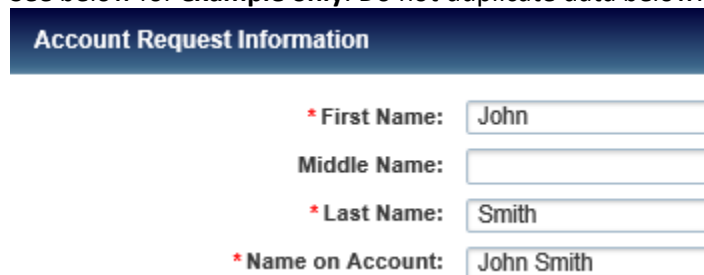


- Click **Submit**

Complete the Account Request Information:

- Enter the required fields:
 - Enter your First Name and Last Name - the Middle Name is optional.
 - Enter your full name in the Name on Account field. This is what will be printed on your card.

See below for **example only**. Do not duplicate data below.



- Please enter your Baylor email address only. No personal email addresses allowed.



- **Enter your Baylor office address.** This is where the card will be delivered and may require a signature upon delivery. Please keep note of this address, as it will be needed if you ever need to call Bank of America.

Primary Mailing Address

* Country: USA

* Address Line 1:

Address Line 2:

* City:

* State/Province: --

* Postal Code:

Input your Baylor office address only. No personal address will be allowed.

- Enter your Baylor business work phone number. Please remember this phone number as it will be part of the verification process to activate your card.

* Phone:

Mobile Phone:

- In the manager name and manager email address fields, **enter your Delegate of Authority** (this person is also your Department Administrator) name and his or her email address. The application will not be processed without DOA approval.

* Manager Name:

* Manager Email Address:

* Confirm Manager Email Address:

I am requesting an account on behalf of another employee.

Check box if this is a request on behalf of another employee.

Input your DOA Name and Email Address. Application will not be processed without DOA Approval.

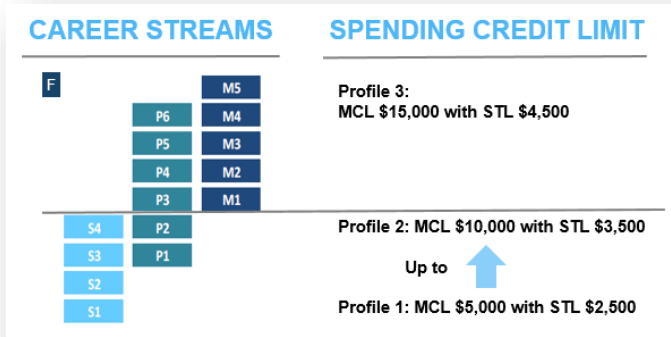
- **Enter your Employee ID number including any preceding zeroes to make your eight digit Baylor Employee ID.**
See below for **example only**. Do not duplicate data below.

* Employee ID:

You must enter your Employee ID including all preceding zeroes. For example, if your employee ID is 12345, you would enter 00012345.

Desired Credit Limit: Credit limits **are linked to career streams and DPP levels**. If you have not been through DPP yet, the spending limit will be adjusted when you receive your leveling, if appropriate.

- **DPP levels S1 – P2** can request profile 1 or profile 2, monthly credit limit \$5K with single transaction limit \$2,500 **or up to** monthly credit limit \$10K with single transaction limit \$3,500 **based on role and business need only**
- **DPP levels P3 – M5, and Faculty (F)** will have profile 3, monthly credit limit up to \$15K with single transaction limit \$4,500



Desired Credit Limit:

- Verification ID:** Enter 1-15 alphanumeric characters of your choice in the verification ID field. The verification ID values cannot contain special characters and the values cannot be a repeated number (e.g., 999999999). **Please retain the verification ID for your records as it will be part of the verification process to activate your card.**

* Verification ID: (1-15)

Used to activate card upon receipt. Retain for your records.

- Account Relation:** Choose the type of account you're requesting. All applications should use the **Individual** account relation.

Use Choice 1, Individual: Account issued to an employee. Example: Joe Smith

Choice 2, Vendor/Merchant/Supplier: Do not use.

Choice 3, Meeting/Department: Do not use.

* Account Relation:

- **Comments:** In this section, please enter the business justification for card request.


Comments:

Please enter the business justification for card request.

- Review the information stated in your application and certify that it is accurate by checking the box.
- When complete click **Submit**.

Please review the information stated above and check mark this box to submit.

I have reviewed the information stated above and certify that it is accurate.





Need more help? Please contact your Program Administrator for assistance.

After Your Online Account Request is completed:

You must review the **Use of Corporate Travel Card/Roles & Responsibilities** and sign the **Corporate Travel Cardholder Agreement** and send to the card administrator for your application to be completed. **This form is required in order to process the card application.**

- Use of Corporate Travel Card/Roles & Responsibilities
- Sign the Corporate Travel Cardholder Agreement

In the mean-time the card request will route to your specified DOA in an email asking for approval. The email will come from worksno-reply@works.com. It is your DOA's responsibility to follow the instructions of the email and forward with an approval or rejection to the card administrator, at cardadmin@bcm.edu. If your DOA does not approve, you will receive an email notification and your application will be deleted.

You will receive email confirmation of the following milestones:

- Application submitted
- Application approved or rejected
- Application status (e.g., missing sign agreement form)
- Welcome email (confirming completed application)

Receive and Activate Your Corporate Card:

After the card number is created, it can take up to three weeks to receive your card. The card is sent via mail. The card will arrive to the Baylor business office address that you specified in your application and will require a signature for delivery.

Please activate your new card according to the instructions on the card and attached letter. To activate your card, you will need both your custom verification code and the phone number from your application.

During the activation call, you will be able to set up your custom pin number (this is your 4 digits #, not your verification/activation code). If you do not remember the information you need to activate your card, please contact the card administrator at cardadmin@bcm.edu.

Submitting your Corporate Card Expense Report:

All expense reporting for your new card will be done through Concur. Please go to <https://www.bcm.edu/about-us/our-campus/administrative-offices/supply-chain-management/shopper-help/how-do-i-pay/card-programs/travel-and-expense-training> for information related to Travel and Expense Concur Training Resources.