

New Visa Cardholder Registration

1. The Visa registration form (in Excel) is now available online at:
<https://www.uwinnipeg.ca/financial-services/forms.html>

Once on this Forms page, go down to the group header called **Visa Application Forms (NEW Cardholders)**. Click on **03.Visa Application-New Cardholder [Excel]**




This Excel file will download to your Download folder on your PC/laptop. Go to Download folder. Open Excel file and Save As **Visa Application-New Cardholder_your name.xlsx**

Your name would be: first initial of your first name plus your last name

Example: Jerry Simmons is saving his application form, he would Save As **Visa Application-New Cardholder_J Simmons.xlsx**

2. Once the Excel form is saved, go to the tab “**employee data entry**” and fill in numbered boxes 1 to 3, 4 to 6, and 9 to 12, as shown on the form

Pay attention to the type of box being filled in:

	Red corner indicates further information about the box to be filled
	Must choose from drop-down menu
	Auto-filled, cannot be modified (do not enter data)

Ignore the tabs “**TRANSMISSION_Finance use only**” and “**def acctg code_Finance use only**” as these two tabs are for Financial Services use only

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Date entry items to look out for:

The cells highlighted in **yellow** indicate the number of characters used and what is remaining for a particular box

Legal First Name is entered ONLY if different from **First Name**

Middle Name is optional **BUT** if used, must be more than one character

Home Address 1 and **Street Type** combined cannot exceed 36 characters

Home Address 2 cannot exceed 36 characters

Postal Code is 6 characters with no space

For **Default Accounting Codes**, Account number is required as well as Department number (if Account number is greater than 70000). Sub-Department, Award and Project are optional

For **Default Accounting Codes**, Company is usually **U of Winnipeg**

3. Sign the Excel application form

For the Employee signature, there are **two** options:

Manual Signature

Print the form and sign it manually and send through internal mail to your Dean/manager/supervisor for approval

Electronic Signature

Provide an electronic signature (see **04.Procedure – Electronic Signature_New cardholder.docx**) and email the form to your Dean/manager/supervisor for approval

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4. Go to tab “**Memorandum of Agreement**”. By signing the application form, you agree to the terms on this tab

5. Go to tab “**Guidelines and Exclusions**”. Please read these guidelines and make sure you understand the requirements and duties of corporate card ownership