

Loadable Card – Process to Register a US Bank Focus Card

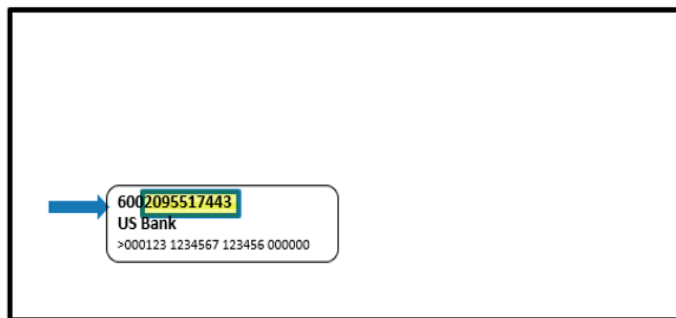
To document the procedure of registering a US Bank Focus card to a recipient. This process is required before funding a card.

Information

Important items to know prior to getting started

- The Focus card **must** be registered to the participant before the first load of funds can occur. There is no need to re-register it when reloading funds.
- The UK Focus Registration spreadsheet provided by Accounts Payable Services (APS), is a template specifically formatted to meet the system requirements when registering a Focus card.

The original template provided to you includes a full list of 10-digit Card IDs that have been specifically assigned to your project and are used by administration to identify each card. The unique Card ID derives from the window of each card envelope as highlighted below.



Note: The card envelope should remain sealed to safeguard the 16-digit card number.

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Procedure

Step 1
Building your Registration Spreadsheet

1. Create a new (blank) Excel spreadsheet and save it as an XLSX file on a department drive using the naming format:
 UK Focus Reg_Custodian/PI Last Name_Current Date
 (example: UK Focus Reg_Smith_080124)

Note: This will be your spreadsheet that you will build and email to loadablecard@uky.edu to register a card(s).

2. Open the UK Focus Registration spreadsheet provided by APS and copy/paste the **first row** into the new Excel spreadsheet created in Step 1.

A	B	C	D	E	F	G	H	I	J	L	M	N	O	P	Q	R	S
Cardholder Card ID	Participant ID	New Card Passcode	Upgrade	Last Name	First Name	Middle Initial	Mailing Address Line 1	Mailing Address Line 2	City	State	Country	Postal Code	Date of Birth	Social Security Number	Driver's License Number	Driver's License State	Matrix

3. Copy/paste the 10-digit Card ID(s) into Column A. Only copy/paste the Card ID(s) of the cards that you recently disbursed to participant(s) and need to register.

A	B	C	D
Cardholder Card ID	Participant ID	New Card Passcode	Upgrade
1234567890			

4. Next, complete the **required** columns below -

- Column E: **Last Name** of the participant
- Column F: **First Name** of the participant
- Column I: **Physical Mailing Address** (no PO Box)
- Column L: **City**
- Column M: **State** (i.e., KY)
- Column N: **Country** (i.e., US)
- Column O: **Postal Code**
- Column P: **Date of Birth** (MM/DD/YYYY)
- Column CP: **Reference** (Cost Object the cards are assigned to)

Save the spreadsheet and proceed to Step 2.

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<p>Step 2 Email Spreadsheet</p>	<p>1. Email the spreadsheet to loadablecard@uky.edu and copy the PI/Account Custodian. Use the file name as the subject line of the email.</p> <p>Before sending, double-check the following:</p> <ul style="list-style-type: none">— The PI/Account Custodian is copied on the email.— The file is saved in the correct naming format.— The data in the required columns is accurate. <p>Note: Do not remove column(s), leave a field blank, or use commas. Doing so will cause the file to fail and/or card(s) will not be registered.</p> <p>Note: If you are submitting more than one file to be uploaded for the same project in the same day, the file name must be unique. In such case, include a "2" on the end of the file name to indicate the second file upload.</p> <p>(example: UK Focus Reg_Smith_080124_2.xlsx)</p>
<p>Step 3 Confirmation</p>	<p>The Loadable Card Team will respond to the email to confirm whether the cards were successfully registered or if there were errors.</p> <p>Once receiving confirmation stating that the cards were successfully registered, you may proceed forward in loading the card(s) with funds, by following the steps provided in the QRC - Process to Fund a US Bank Focus Card.</p>
<p>Questions</p>	<p>Email: loadablecard@uky.edu</p>