

## Administrator Setup Form: "Secure Access" – For an Electronic Value Card ("EVC") Facility

➤➤ PLEASE REFER TO PAGE 4 FOR INSTRUCTIONS TO ESTABLISH, MODIFY OR DELETE AN ADMINISTRATOR

### Customer Details

Full Name of Organisation

EVC Facility ID

### Administrator Details

New
  Modify
  Delete

First Name	Last Name	Email Address	User ID	If Modifying – Action being requested

### Administrator Signature(s) & Identification

#### Westpac Implementation Manager Use Only

First Name	Last Name	Administrator Signature	Westpac IDV No.	Westpac CIS Key

**Identification:** Each nominated Administrator must be identified according to AML/CTF requirements.

**Signed for and on behalf of** (*insert name of organisation*):

Name in full

Title (*e.g. Director/Secretary*)

by (*signature*)

Date

Name in full

Title (*e.g. Director/Secretary*)

by (*signature*)

Date

## Administrator Setup Form: **“Secure Reports”** – For an Electronic Value Card (“EVC”) Facility

➤➤ **PLEASE REFER TO PAGE 4 FOR INSTRUCTIONS TO ESTABLISH, MODIFY OR DELETE AN ADMINISTRATOR**

### Customer Details

Full Name of Organisation

EVC Facility ID

### Administrator Details

 New     Modify     Delete

First Name	Last Name	Email Address	User ID	If Modifying – Action being requested

### Administrator Signature(s) & Identification

#### Westpac Implementation Manager Use Only

First Name	Last Name	Administrator Signature	Westpac IDV No.	Westpac CIS Key

**Identification:** Each nominated Administrator must be identified according to AML/CTF requirements.

**Signed for and on behalf of** (*insert name of organisation*):

Name in full

 Title (*e.g. Director/Secretary*)

 by (*signature*)

Date

Name in full

 Title (*e.g. Director/Secretary*)

 by (*signature*)

Date

**Westpac Only Use Section**

This section is to be verified & approved by the Westpac Customer Manager

**Verified and approved by:**

Name

Position

Salary no.

BSB

Phone no.

Signature

Date

## Instructions to Establish, Modify or Delete an Administrator

Westpac recommends a minimum of THREE Administrators be established for a prepaid Electronic Value Card facility.

To Establish, Modify or Delete an Administrator, complete the forms and return them to your Westpac Customer Manager.

### 1. 'Administrator Setup Form: "Secure Access"'

Please complete the following fields, in order for the Administrator to gain access to manage your organisations CardWiz\*\* Users:

- Select 'new', 'modify' or 'delete'
- Enter First Name, Last Name & email address of Administrator(s)
- Nominate a User ID. Must be Alpha-numeric (*maximum 15-characters*), with no special characters, and cannot be the same ID as the one nominated for Secure Reports. E.g. SmithJ1. If User IDs are not nominated, Westpac will create the User IDs and advise the Administrators
- If modifying existing Administrators, record details of what you are modifying.
- **Identification** – copy names into the Administrator Identification table, then each Administrator must sign next to their name. Administrators must be identified by Westpac before they can be provided with the Administration Access.

### 2. 'Administrator Setup Form: "Secure Reports"'

Please complete the following fields, in order for the Administrator to gain access to daily & monthly \*.CSV format reports:

- Select 'new', 'modify' or 'delete'
- Enter First Name, Last Name & email address of Administrator(s)
- Nominate a User ID. Must be Alpha-numeric (*maximum 15-characters*), with no special characters, and cannot be the same ID as the one nominated for Secure Access. E.g. SmithJ1. If User IDs are not nominated, Westpac will create the User IDs and advise the Administrators
- If modifying existing Administrators, record details of what you are modifying.
- **Identification** – copy names into the Administrator Identification table, then each Administrator must sign next to their name. Administrators must be identified by Westpac before they can be provided with the Administration Access.

\*\* CardWiz is the application used by your organisation to manage the prepaid Electronic Value Cards. This includes loading value & activating cards, viewing transactions, reload/ unload value, suspend/ unsuspend & close cards.