Online Enrollment User Guide
Version 3.0
7/21/08

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General Information

Introduction

Welcome to JPMorgan Chase's Online Enrollment! With Online Enrollment, JPMorgan Chase Commercial cardholders have access to a streamlined, Internet-based application for processing of card applications, thereby speeding up the overall enrollment process, reducing the possibility for processing errors and eliminating the need for paper applications.

We hope that you find the Online Enrollment feature to be a useful tool in managing your Commercial Card program with JPMorgan Chase.

Process Overview

Online Enrollment is designed to streamline the day-to-day processing of applications in managing a JPMorgan Chase Commercial Card program on an ongoing basis. The first step of the process is for the Agency/Organization Program Coordinator (A/OPC) to communicate the URL (https://www.cc-accountcenter.com/jpmorganchase_commercial/eapp/ss_applicationID.jsp) and Application ID information to potential applicants. This communication should provide all the instructions a card applicant will need to understand how to initiate a card application online. Your Account Manager can provide you with a sample communication to streamline creating this communication.

Once the communication has taken place, new applicants should have the basic information they need to initiate the application online. They will visit a website, enter the appropriate application ID, complete the application online, review it for accuracy and submit it for processing by your Agency.

Applicants will enter their manager's information into their application, including an email address. After the applicant has submitted the application, the manager can receive an email notifying them of the application. Depending upon how you would like your program to be configured, the manager can then be requested to actively approve or deny the application (by using a link and password provided by email) or can simply be notified (passive approval) with an email that they should contact the A/OPC if they do not support the application. Manager approval / notification can also be turned off altogether. Throughout the application process, both the employee and the manager (if applicable) will be updated on the progress of the application via email.

After submission of the application, it will be forwarded to the A/OPC for review and decisioning. The A/OPC will enter some additional information and either approve or deny the application. Approved applications will be sent to JPMorgan Chase electronically for processing.

Please note that it is the client A/OPC's responsibility to validate the information of each applicant prior to processing the application, just as in the paper process. This will include validating the employment of the employee, ensuring the employee needs a card, etc.

Additionally, it is important to understand that this product is not designed to handle large batches of applications, such as those used in setting up a new program. This is generally better handled through the use of files that are processed in a different manner. Your account representative can assist you with such requests if and when the need arises.

Requirements
• Internet access, AOL® 6.0, Internet Explorer® 5.01 SP2, and Netscape 4.78 or higher.
• Memory requirements:
      32 MB of RAM (Minimum) and 64 MB of RAM (Recommended).
• Please note that cookies, Java, and JavaScript must be enabled.

User Information

User Name:
Password:
Application ID:

Note: You may have multiple application IDs, depending upon your program setup, in which case you many want to keep a grid of the IDs and their appropriate uses.

Please retain this vital information. If you forget your password, please refer to the "Changing your password" section of this guide for more detail.

Troubleshooting
• For any connectivity problems, call your network admin first to determine if they are having a network outage. Internal connectivity problems must be resolved by your network admin and the JPMorgan Chase Help Desk will not be able to assist you.
• If you are still having problems and your network is not the cause, call the JPMorgan Chase Client Application Support at 1-877-967-1100

External Application Process

Through the external application process, applicants can submit applications for review and decisioning. The following tasks can be performed within the External Application Process:
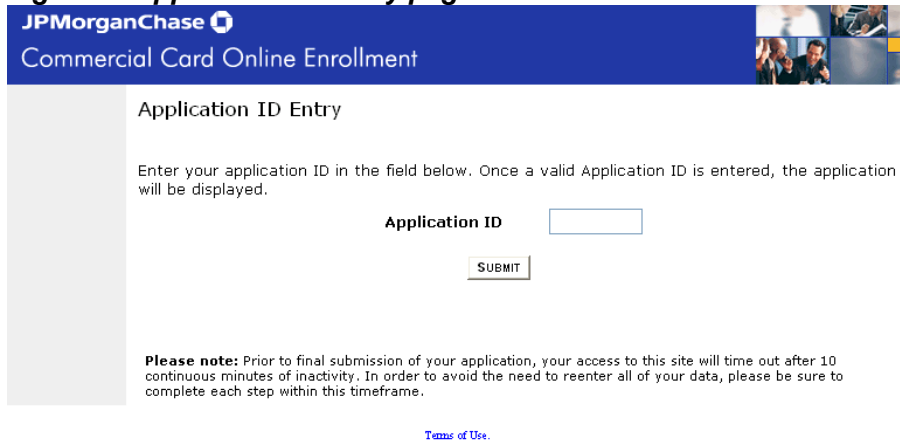- ◆ Submit application information
- ◆ Edit application information just entered
- ◆ Cancel application
- ◆ Print application

Submit Application Information

To submit an application:
1) A/OPC refers potential cardholder the link to Online Enrollment and Application ID
2) Employee accesses the External Application Internet site provided by their Agency (from a link from the Agency site or from typing in the URL). The Application ID Entry page appears (**Figure 1**).

Figure 1: Application ID Entry page

JPMorganChase
Commercial Card Online Enrollment

Application ID Entry

Enter your application ID in the field below. Once a valid Application ID is entered, the application will be displayed.

Application ID

SUBMIT

Please note: Prior to final submission of your application, your access to this site will time out after 10 continuous minutes of inactivity. In order to avoid the need to reenter all of your data, please be sure to complete each step within this timeframe.

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2) Enter the Application ID and click **Submit**. The Application page is displayed. (**Figure 2**.)
Figure 2: Application page

3) Enter information in the corresponding fields and click **Submit to Review**. The Application Review page is displayed (**Figure 3**.)

> **Note:** *If employee enters information completely and correctly, the external Application Review page displays with the information just submitted. If the employee does not enter required information or enters invalid data, an error message displays on the Application page.*

Figure 3: Application Review page

4) Once the application has been reviewed, the employee can do one of the following:
- Submit
- Edit
- Cancel
- Print

5) If the employee clicks **Submit**, the application request has been submitted and the Confirmation page appears (**Figure 4**.) An E-mail notification is sent to the employee (see below) and the manager.

> **Note**: *Managers only receive emails if that capability is turned on*.

Figure 4: Confirmation page and email Notification
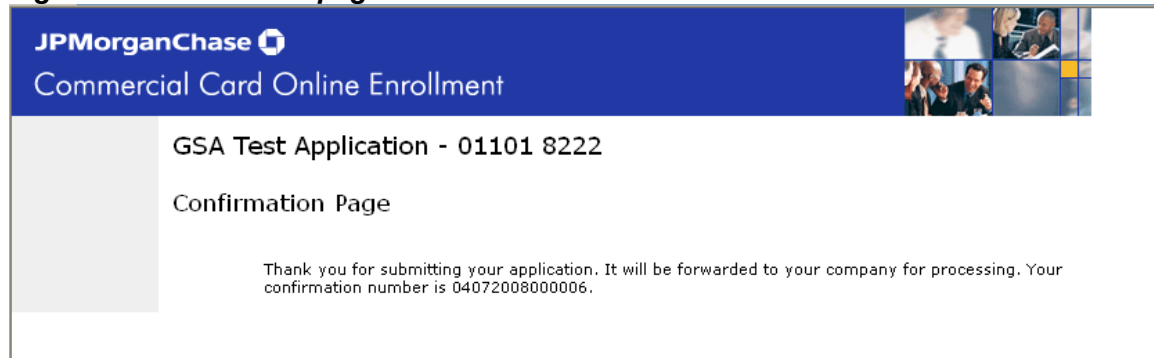
Note: The email notification sent to the employee is as follows:

Thank you for applying for a GSA Agency Commercial Card from JPMorganChase. Your confirmation number is 04082008000006

Your application is pending additional approvals prior to submission to JPMorganChase.

You will receive additional updates as your application is processed.

Thank You,

JPMorganChase Customer Service

6) If the employee clicks **Edit**, they are returned to the Application page.

7) If the employee clicks **Cancel**, the application information is cleared and the user is directed back to the Application ID Entry page.

8) If the employee clicks **Print**, the employee is able to print the application form to the selected local/network printer.

Manager Alert/Approval

The Manager Alert/Approval feature allows the manager of the employee submitting the application to be involved in the overall process.

Manager Alert (Passive)

When Manager Alert has been enabled, the following will occur:
> For external applications, the Application page will display three required fields for manager information (name, e-mail, work phone). Upon the submission of the application, the system will generate e-mail to the address provided. The email is shown below:

This email is to inform you that your employee, PAUL SMITH, has applied for a GSA Agency Commercial Card from JPMorganChase.

Please contact your company's commercial card program administrator immediately if you do not support this application and the potential issuance of a card to this individual.

Thank you for your attention to this matter.

Sincerely,
JPMorganChase Customer Service

Manager Approval (Active)

When Manager Approval has been enabled, it will allow Managers to review and approve or reject their employee's application request.

To approve/reject an employee application:
1) An employee must submit an application. The following email is sent to the employee's manager:

PAUL SMITH has applied for a GSA Agency Commercial Card from JPMorganChase and has listed you as his / her manager for the purpose of providing a manager approval.

Please click on the link below, enter the Manager Approval Code, review the application and submit a decision on the application. Once this decision is submitted, your company's Commercial Card Program Administrator can continue the application process. Please note that the Program Administrator has the ability to approve or decline the application prior to your decision being submitted.
Internet Link: https://www.cc-accountcenter.com/jpmorganchase_commercial/eapp/ss_mgr_signon.jsp
Manager Approval Code: 025KB06KAA1603

Please review the application at your earliest convenience. Failure to process the application within 60 days will result in the application being terminated and any further action will require re-submission of a new application by the applicant.
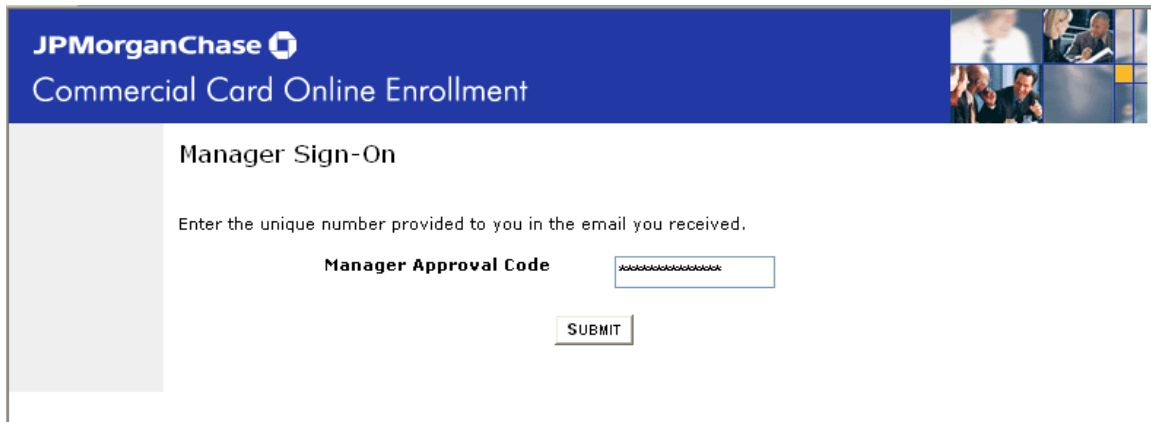
Thank you for your attention to this matter.

Sincerely,
JPMorganChase Customer Service

2) The manager goes to the URL identified in the email, the Manager Sign-On page (**Figure 5**) displays.

Figure 5: Manager Sign-On page

3) Enters the Manager Approval code. The employee's application information displays on the Manager Approval page (**Figure 6**.) These fields are not editable.

Figure 6: Manager Approval Page

GSA Test Application - 01101 8222

Manager Approval Page

indicates required field

First Name*	PAUL
Middle Initial	
Last Name *	SMITH

Billing Address

Address Line 1*	123 MAIN ST
Address Line 2	
City*	CHICAGO
State*	IL
Zip Code*	60670
Date of Birth*	01/01/1970
Email Address*	P.SMITH@AGENCY.GOV
SSN	987654321
Name Line 2	
Work Phone	
Home Phone	
Employee ID	12345
MMN (Or Unique Phrase)	SUMMER

Employment Information

|	
Manager's Name	BILL LUMBERG
Manager's Email	B.LUMBERG@AGENCY.GOV
Manager's Work Phone	312-954-5519

By submitting this application, I (the applicant) indicate consent for JPMC to perform a credit worthiness evaluation at the request of my agency. Note to applicants: If you do not consent to a credit worthiness evaluation, DO NOT SUBMIT THIS ONLINE APPLICATION. Instead, contact your A/OPC to obtain and complete a paper application (check the box on the paper application indicating you do not consent).

APPROVE   REJECT

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4) The Manager approves or declines the employee's application.

If the manager approves the application, the following occurs:
- The Confirmation page (approved) is displayed (**Figure 7**)
- An email (approved) is sent to the employee
- The application status will change in the A/OPC view to reflect "Pending PA Approval."

Figure 7: Manager Confirmation page – Approved and Manager email
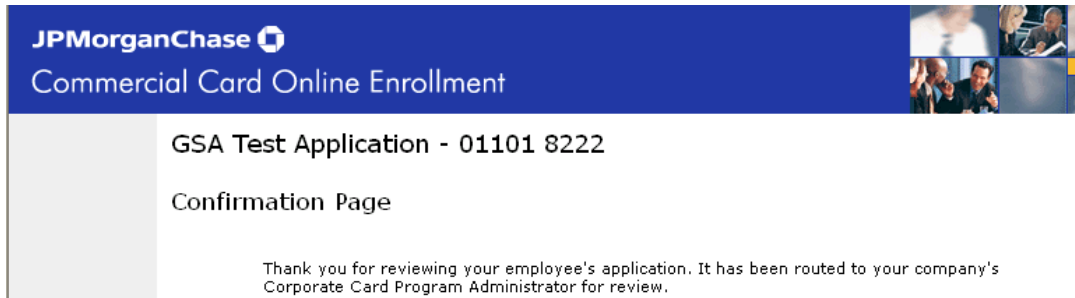
Email to employee when manager approves:

Your request for a GSA Agency Commercial Card from JPMorganChase has passed your Manager's review.

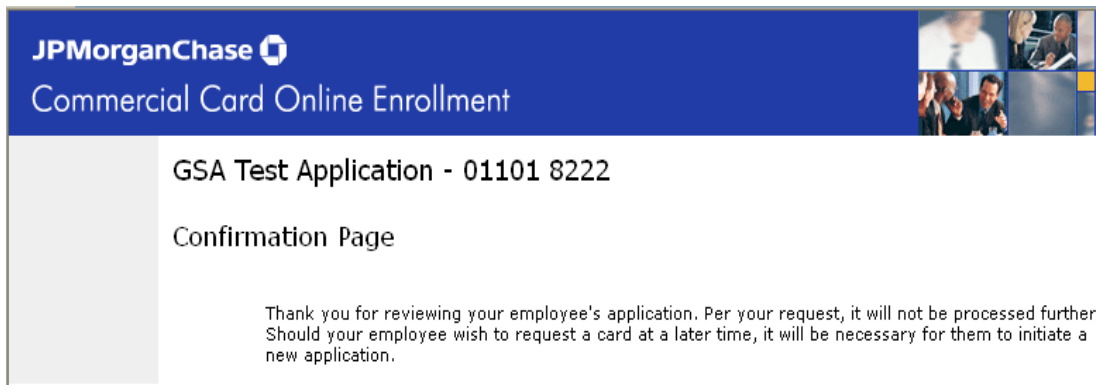The application has been forwarded to your company's commercial card program administrator for approval.

Thank You,

JPMorganChase Customer Service

If the manager rejects the application, the following occurs:
- The Confirmation page (declined) is displayed (**Figure 8)**
- An email (declined) is sent to the employee
- The application status will change in the PA view to reflect "Refused by Manager."

Figure 8: Manager Confirmation page – Rejected and Employee email

Email to employee when manager rejects:

Your request for a GSA Agency Commercial Card from JPMorganChase did not pass your Manager's review.

Should you require additional information on this decision or the application process, please contact your manager or your company's commercial card program administrator.

Thank You,

JPMorganChase Customer Service

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5. The Manager closes the Confirmation page. The user exits the site.

Application Search / Review

Application Search

The Application Search feature allows A/OPC's to search for applications by various categories.

To search for an existing application:
1) Enter Account Center through standard sign-on process.
2) Click **Applications** on horizontal blue navigation bar at the top of the page. The Application Search page displays (Figure 9)

Figure 9: Application Search page

3) Enter values in any or all of the following search parameters:
- Application Status
- Application ID
- Company Number
- Applicant Name (first/last)
- Date Submitted (from/to)
- Sort By

Note: To *search by a full or partial name, enter the first few letters of the name followed by the percent sign. For example, entering an applicant's Last Name as JO% will return all Applicants with Last Names that begin with JO.*

4) Click **Reset** or **Search**.

> **Reset** – Clears the search criteria
> **Search** – Search results display at bottom of page. If there are too many to display on the page, the Prev/Next buttons allow the user to navigate through the pages of search results (**Figure 10.**)

The fields that display in the search result set are:

> **Applicant Name** – The name of the employee submitting an application
> **Date Submitted** – The date the application was submitted by the employee
> **Application Status** – Where in the process the application currently resides
> **Company Number** – The number of the company/agency to which the employee belongs
> **Application ID** – The unique number of the application form that the employee submitted

The list of available Statuses is as follows:

> **Pending Manager Approval** – (only if Manager Approval (Active) is enabled) Awaiting manager review
> **Refused by Manager** – (only if Manager Approval (Active) is enabled) Indicates that the application was declined by the manager
> **Pending PA Approval** – Awaiting A/OPC review
> **Refused by PA** – The A/OPC has refused the application
> **Submitted to JPMorgan Chase Awaiting Batch** – The application has been approved by the administrator and is waiting to be sent to JPMorgan Chase.
> **Submitted to JPMorgan Chase Batched** – the application has been approved by the administrator and has been sent to JPMorgan Chase.

Figure 10: Application Search Result

5) Once the search results are displayed the user can perform one of the following:
  ◆ Download (allows user to save a file of the data listed in the table, but not all related data by applicant at this time)
  ◆ View Application

6) If the user clicks **Go** to download, the search results are presented in a format that can be downloaded by the user.

7) If the user clicks on one of the **Applicant Names** displaying in the search results. The appropriate application view is displayed to the user based on status.

> **Note**: *If an application has a status of "Pending PA Approval", an editable view will display. If an application has a status of "Refused by PA", "Submitted to JPMorgan Chase Awaiting Batch" or "Submitted to Bank One Batched", a non-editable view will display.*
> **Note:** *Applications that are not accepted or rejected are available in the system for 60 days, at which time they will be purged.*
> **Note: Completed applications remain on the system indefinitely**

Application Review

Enable Program Administrators to edit, reject, and approve applications entered externally by an Employee.

1) User enters Online Enrollment through sign-on. User clicks **Applications** on blue navigation bar.
Application Search page displays. User searches for applications and selects one.
Application displays (**Figure 11**.)

> **Note:** *If Manager Approval is turned on at the Agency level, applications that have been refused by the Manager cannot be edited/refused/approved by the* A/OPC. *The* A/OPC *will see a Historical Online Enrollment view.*

> **Note:** *An* A/OPC *cannot edit/refuse/approve an application already refused or approved by another* A/OPC. *The* A/OPC *will see a Historical Online Enrollment view.*

> **Note***: Even if Manager Approval is turned on for the Agency,* A/OPC's *can approve or refuse an application before a Manager does (doing so will supercede the manager's approval and send the application to JPMorgan Chase, so it should not be done if the* A/OPC *still wants the manager to review the application). Upon entering the application, the* A/OPC *will see a Manager Status of "Pending Approval by Manager," but the* A/OPC *will be able to bypass the Manager.*

> **Note:** *All applications not reviewed within 60 days will be purged from the system and cannot be retrieved. In this case, the applicant must complete a new application.*

> **Note:** *If the Manager Status field indicates "bypass" please disregard at this time.*

Figure 11: Program Administrator Application Reject/Complete

Administrative Options

TBR Hierarchy

Agent (Plastic)   Select One ▾

Requested Credit Limit   Select One ▾

Account Level Velocities

Single Purchase Limit

Transactions Per Day

MCC Groups

MCC Group 1

MCCG Key 1

MCC Single Purchase
Limit 1

Action 1   None ▾

MCC Group 2

MCCG Key 2

MCC Single Purchase
Limit 2

Action 2   None ▾

MCC Group 3

MCCG Key 3

MCC Single Purchase
Limit 3

Action 3   None ▾

MCC Group 8

MCCG Key 8

MCC Single Purchase
Limit 8

Action 8   None ▾

MCC Group 9

MCCG Key 9

MCC Single Purchase
Limit 9

Action 9   None ▾

Application Status

Manager Status   Date

By submitting this application, I (the applicant) indicate consent for JPMC to perform a
credit worthiness evaluation at the request of my agency. Note to applicants: If you
do not consent to a credit worthiness evaluation, DO NOT SUBMIT THIS ONLINE
APPLICATION. Instead, contact your A/OPC to obtain and complete a paper application
(check the box on the paper application indicating you do not consent).

SUBMIT TO REVIEW   REJECT

2) At this point, certain fields can be edited, while others require mandatory entry.
   Editable fields
   ◆   E-Mail Address

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- ◆ Office Phone
- ◆ Business Unit

Mandatory fields
- ◆ TBR Hierarchy
- ◆ Credit Limit
- ◆ Agent

3) Click **Submit to Review** or **Reject**.

Submit to Review – The Application Review page displays (**Figure 12)**

Reject – The Refusal Confirmation page displays (**Figure 13)** and emails are sent to the employee and manager (if Manager Alert/Approval is turned on)**.**

Note: *To exit the Application Review Page and return to the Search results, click on "Application Search" tab in the left margin or use the "Back" button on your browser.*

Figure 12: Application Review page

JPMorganChase
Commercial Card Account Center

| Account Look up | Transaction Activity | Account Management | User Manager | Online Enrollment |

HOME | INBOX | HELP | SIGN OFF

Application Search

Submit an Application

App ID Management

GSA Test Application - 01101 8222

Account: xxxx-xxxx-xxxx-2652
You are emulating **Aopc Test**
End Emulation

Program Administrator Application Approval

Return to Search Results

*indicates required field

First Name*	PAUL
Middle Initial	
Last Name *	SMITH

Billing Address

Address Line 1*	123 MAIN ST		
Address Line 2			
City*	CHICAGO	State*	IL
Zip Code*	60670		
Date of Birth*	01/01/1970		
Email Address*	P.SMITH@AGENCY.GOV		
SSN	987654321		
Name Line 2			
Work Phone			
Home Phone			
Employee ID	12345		
MMN (Or Unique Phrase)	SUMMER		

Employment Information

Manager's Name	BILL LUMBERG
Manager's Email	B.LUMBERG@AGENCY.GOV
Manager's Work Phone	123-456-7890

Administrative Options

TBR Hierarchy	00100 00000 00000 00000 00000 00000
Agent (Plastic)	
Requested Credit Limit	0

Account Level Velocities

Single Purchase Limit

Transactions per Day

MCC Groups

MCC Group 1

MCCG Key 1

MCC Single Purchase
Limit 1

Action 1   None

MCC Group 2

MCCG Key 2

MCC Single Purchase
Limit 2

Action 2   None

MCC Group 3

MCCG Key 3

MCC Single Purchase
Limit 3

Action 3   None

MCC Group 8

MCCG Key 8

MCC Single Purchase
Limit 8

Action 8   None

MCC Group 9

MCCG Key 9

MCC Single Purchase
Limit 9

Action 9   None

Application Status

Manager Status   Date

By submitting this application, I (the applicant) indicate consent for JPMC to perform a
credit worthiness evaluation at the request of my agency. Note to applicants: If you
do not consent to a credit worthiness evaluation, DO NOT SUBMIT THIS ONLINE
APPLICATION. Instead, contact your A/OPC to obtain and complete a paper application
(check the box on the paper application indicating you do not consent).

SUBMIT   EDIT   REJECT   PRINT

Figure 13: Program Administrator Reject Confirmation page

Figure 14: Applicant Reject email

Your request for a GSA Agency Commercial Card from JPMorganChase did not pass your company's review.

Should you require additional information on this decision or the application process, please contact your company's commercial card program administrator.

Thank You,

JPMorganChase Customer Service

4) If **Submit to Review** is selected, the Application Review page will provide the following options:

> **Submit** – If selected, the Approval Confirmation page will appear (**Figure 15**) and an email will be sent to the employee/manager.
> **Edit** – Will take user back to the Program Administrator Application Reject/Complete page.
> **Reject** – The Refusal Confirmation page displays and an email will be sent to the employee/manager.
> **Print** - If the A/OPC clicks Print, they can print the application form to the selected local/network printer.
>
> **Note:** *Daily Application submission deadline is 2:45 p.m. Eastern Standard Time. All applications submitted after the deadline will be processed on the following processing / business day.*

Figure 15: Approval Confirmation page and Manager and Applicant emails:
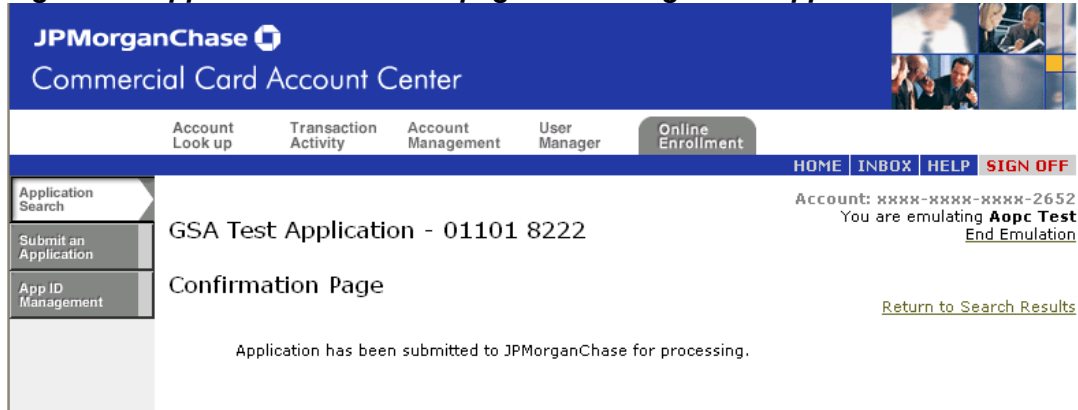
Email sent to Applicant's Manager upon submission to JPMorgan Chase:

The GSA Agency Commercial Card application submitted by your employee PAUL SMITH has passed your company's review.

The application has been forwarded to JPMorganChase.

Thank You,

JPMorganChase Customer Service

Email sent to Applicant upon submission to JPMorgan Chase:

Your request for a GSA Agency Commercial Card from JPMorganChase has passed your company's review and been forwarded to JPMorganChase.

Thank You,

JPMorganChase Customer Service

Conclusion

Thank you for using JPMorgan Chase's Online Enrollment. We hope that you will find this a valuable tool to complement your Commercial Card program.