

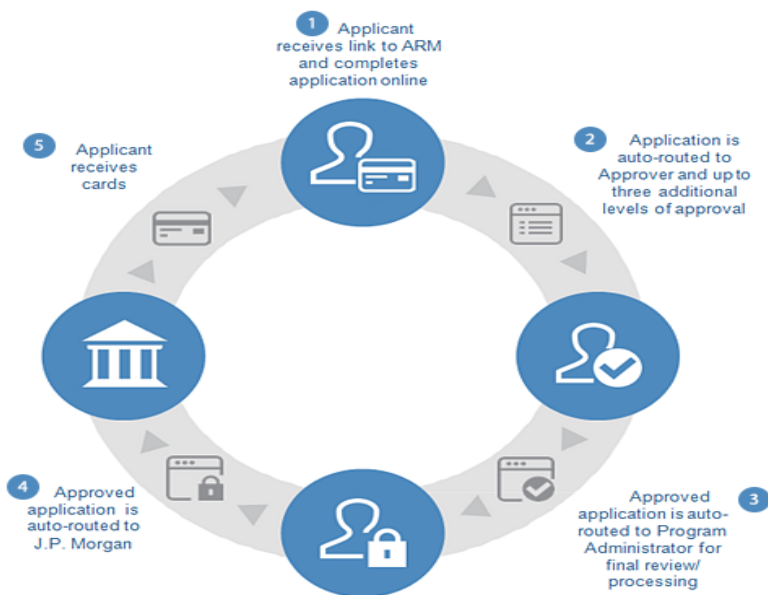
PaymentNet Online Application Guide for Applicants

Overview

The University of Pennsylvania's online application process in PaymentNet®, automates the paper application, submission, approval, and fulfillment process for the JPMorgan's Purchasing Card, Meeting and Student Program applications. The following figure provides an overview of the on-line application workflow tasks.

The following figure provides an overview of the workflow tasks.

Figure 1: Online Application Workflow Tasks



1. The card applicant clicks on the link to the application and completes the application online.
2. The completed application is automatically (once the applicant chooses approver from drop down box) sent to an approver, who reviews and approves it and forwards the application is sent to the next approver until the approval process is complete.
3. When the last approver has approved the application, it is sent to the Program Administrator for final review and processing.
4. The application is then sent to J.P. Morgan to create the account and issue the new card.
5. The applicant receives the new card and can immediately activate it and begin using it.

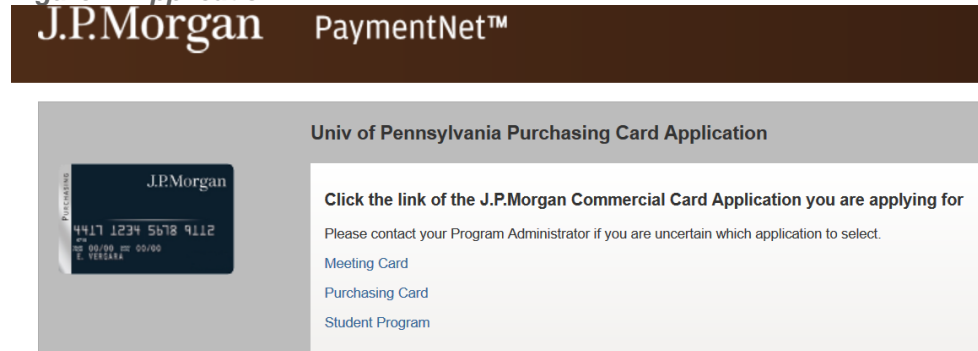
Completing the Application

To access the online application click on the on link [here](#). When the applicant clicks the link, the applicant will be taken directly to the online application upon authentication with Penkey name and password.

Note: There are multiple links for the various types of applications (Purchasing Card, Meeting or Student Program Card). If the applicant does not know which card to be applying for please contact the Card Program Administrator purchasingcardsupport@upenn.edu

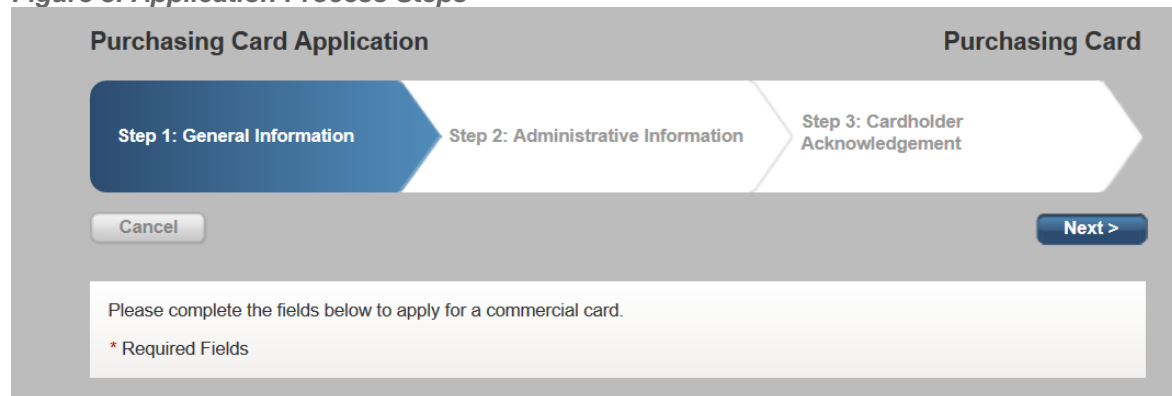
The following figure shows the application link posted on the website

Figure 2: Application Link



When the application is open, complete the required fields marked with a red asterisk. If there are specific field requirements, additional help text explains how to enter the requested information. There are three steps to the application process as shown in the figure below, followed by the final submission of the application to the workflow.

Figure 3: Application Process Steps



- Step 1: General Information
- Step 2: Administrative Information
- Step 3: Cardholder Acknowledgement
- Final Submission

Step 1: General Information

In Step 1: Enter your name, address, contact information, and other details to ensure the security of your account.

Applicant Information

| | | |
|---------------------|---------------------------------|---|
| Full First Name* | <input type="text"/> | Enter Full First Legal Name |
| Last Name* | <input type="text"/> | Enter Full Last Legal Name |
| Date of Birth* | <input type="text"/> MM/DD/YYYY | |
| Penn ID* | <input type="text"/> | Enter Penn ID Number |
| PaymentNet User ID* | <input type="text"/> | Enter Penn Key Name (6 or more character minimum) |

- **Full First Name** and **Last Name**: Enter your full, legal first and last names.
- **Date of Birth**: Enter your date of birth in the requested format.
Note: To improve compliance with The Office of Foreign Assets Control (OFAC) of the U.S. Department of the Treasury, the **Date of Birth** field is mandatory. It is used to verify access to a commercial card as well as validate your identify when you call J.P. Morgan for customer support or use the online tools.
- **Employee ID**: Enter your Penn Key ID number. (9 digit # from your Penn ID)
- **PaymentNet User ID**: Enter your Pennkey username. Note that the User ID must be six or more characters, please append with other characters if your username does not meet this criteria.
- **Account Security**: The field labels and help text on the application will clarify the information you are expected to provide in the fields below. You cannot enter the same value in both fields.

Account Security

| | | |
|---|----------------------|---|
| SSN (Last 4 Digits)* | <input type="text"/> | Enter only last four digits of your SSN |
| Access Code 2 (Formerly Mother's Maiden Name)* | <input type="text"/> | Enter four characters either alpha or numeric |

SSN: Enter a four digit security identifier of your choosing. Only numeric characters can be entered in this field.

Access Code 2: Enter a four-digit alpha or numeric identifier for security purposes. You will also use this entry as your personal identification number (PIN) for your credit card.

Name as It Will Appear on Card

First Name on Card, Middle Initial, and Last Name on Card — Enter your first name, middle initial (if applicable), and last name exactly as you want them to appear on your card. The combined number of characters in these fields may not exceed 23 characters due to space limitations on the actual card.

Name as it Will Appear on Card

First Name on Card*

Middle Initial

Last Name on Card* First and Last name up to 21 characters

Enter Contact Information

Contact Information

University Email Address*

Business Phone Number* XXX-XXX-XXXX

Address Information

Cardholder Address (Card Delivery-Business Office Address) Provide the address where your card should be delivered once your account is created. This address is also your billing address, your organization has already chosen whether to have cards delivered to your business office addresses or to a central departmental location (I.E: CHAS, GSE, Design, SAS, VET, and Wharton).

▼ Cardholder Address (Card Delivery)

Street Address* University Office Address

Street Address Line 2 examples: Suite 1410; Building A

City*

State/Province* ▼

ZIP/Postal Code*

Home Address: Provide your (US if you are a student) home address.

Note: To improve compliance with The Office of Foreign Assets Control (OFAC) of the U.S. Department of the Treasury, the **Home Address** is mandatory. It is used to verify access to a commercial card as well as validate your identify when you call J.P. Morgan for customer support or use the online tools. When you have provided all the required information in Step 1, click the **Next** button. You will be asked to verify all the information in Step 1 before you can proceed to Step 2. If necessary, you may return to Step 1 to edit your application and then continue with the application process.

Home Address

Country* USA ▼

Street Address* Enter USA Home Address

Street Address Line 2 examples: Apt 2E; Suite 1410; Building A

City*

State/Province* ▼

ZIP/Postal Code*

Step 2: Administrative Information

In Step 2: Administrative Information, applicants will be prompted for additional information and will be required to select an approver for your application from a drop down box.

Approval

The application will be directed to the approver as selected from a drop-down list of pre-approved approvers. Applicants can verify who their approver is by contacting their Department Business Administrator.

Comments

The applicant can enter comments related to the application. Comments are optional and will be visible to all approvers who review the application and to the Program Administrator. When you have provided all the required information in Step 2, click the **Next** button. You will be asked to verify all the information in Step 2 before you can proceed to Step 3. If necessary, you may return to Step 2 to edit your application and then continue with the application process.

Note: If any data fields are incomplete or have invalid entries, a red bar with an error message will appear at the top of the screen. Hover your cursor over the red exclamation mark to view the reason for the error, then make the necessary corrections. You must correct all errors before you can successfully submit your application.

Step 3: Cardholder Acknowledgement

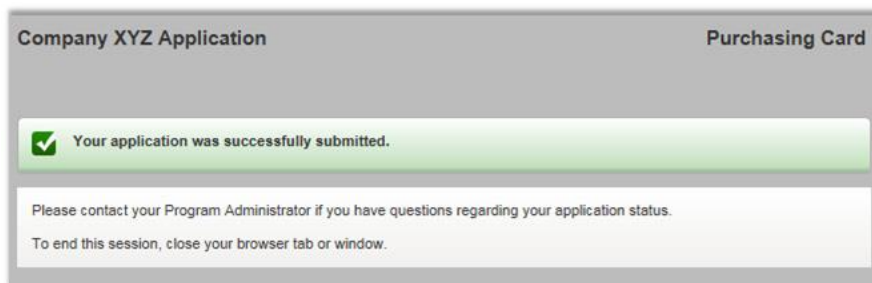
In Step 3: Cardholder Acknowledgement, applicant must review and accept the cardholder acknowledgements that appear.

- J.P. Morgan Chase Cardholder Acknowledgement: Applicant will be prompted to review and accept the J.P. Morgan Chase Cardholder Acknowledgement. Applicant must agree to the terms by clicking the box.
- Penn Purchasing Cardholder Agreement: Applicant will be prompted to review the details and select the checkbox to indicate that applicant agree to the terms. If applicant has questions about either of the Cardholder Acknowledgements, please contact the Card Program Administrator.

Once applicant has completed Step 3, applicant can click the **Previous** button to return to previous steps of the application and make any necessary edits. When the application has been completed, click the **Submit** button.

Final Submission

After completing Step 3, a screen confirming the successful submission of the application will appear and the applicant can then exit out of the online application.



An email notification is sent confirming your submission.

As the application moves through the approval workflow process, the applicant will receive additional emails alerting the applicant of its progress. These emails will have the following subject lines:

- **Application Approved:** your application has been approved and now awaits final signoff by The Card Program Administrator.
- **Card Account Processing:** the Card Program Administrator has completed the final approval step and processing of your card will begin.
- **Application Rejected:** your application has been rejected by the approver for the reason stated in the email. You will need to submit a new application. If you need more information or have questions please contact the Card Program Administrator at purchasingcardsupport@upenn.edu