J.P. Morgan Canada Tax Payment site – What's New?

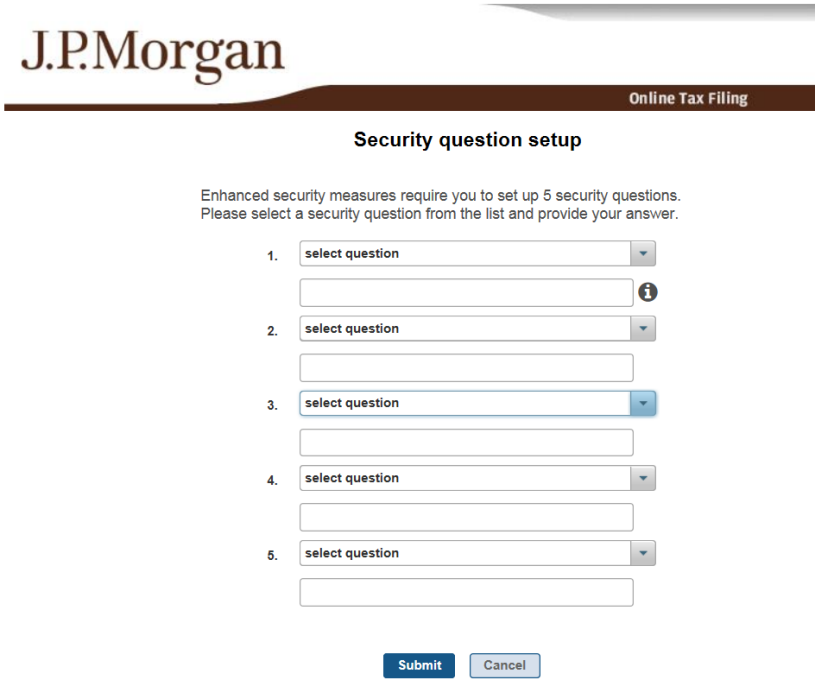
Introduction

The upgraded J.P. Morgan Canada Tax Payment site features new security features and functionality improving the security and resiliency of the Tax Application. Additionally, the Canada Tax Payment application has been enhanced to include bill payment capabilities.

1. Starting October 1, 2018, any existing clients will be prompted to set security questions for their profile, as per below.
    i. Client can use the drop down menu to select the questions from the fixed lists.
    ii. Create answers for each question in the response box
    iii. Once all unique questions are selected and responses are entered, click **Submit**

Moving forward, any new clients that sign up for Tax filings and/or Bill Payment will be required to set up security questions.

Note: There must be no duplicate selection for the Security Questions; if so, the system will alert you.



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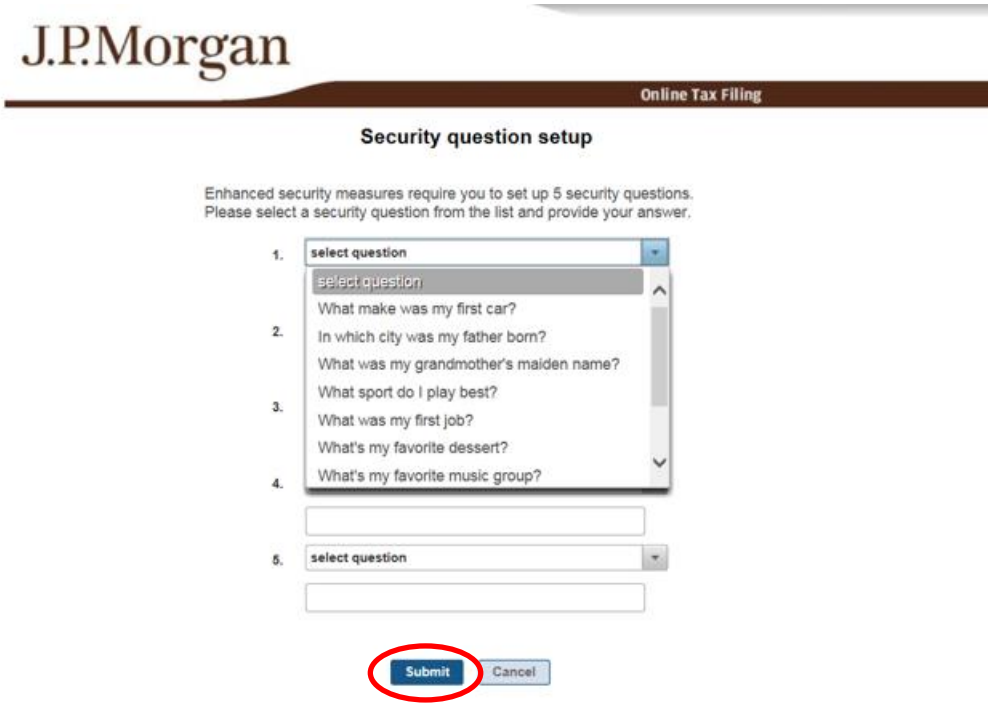

2. If the security questions are set successfully, clients will see the following screen. They need to click on **Sign On** to proceed to the home page.

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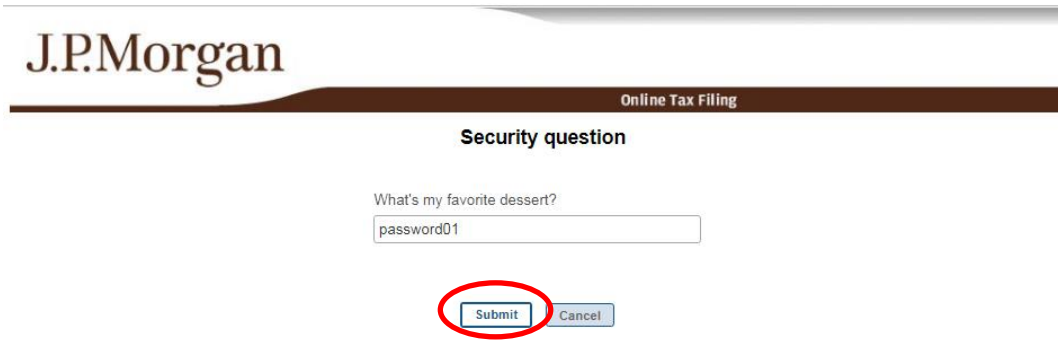
3. Once the security questions have been set up, in future log ins, once the log in credentials have been verified, the user/administrator shall be asked to answer one of their security questions. Correctly answer the question in the response box and click **Submit**



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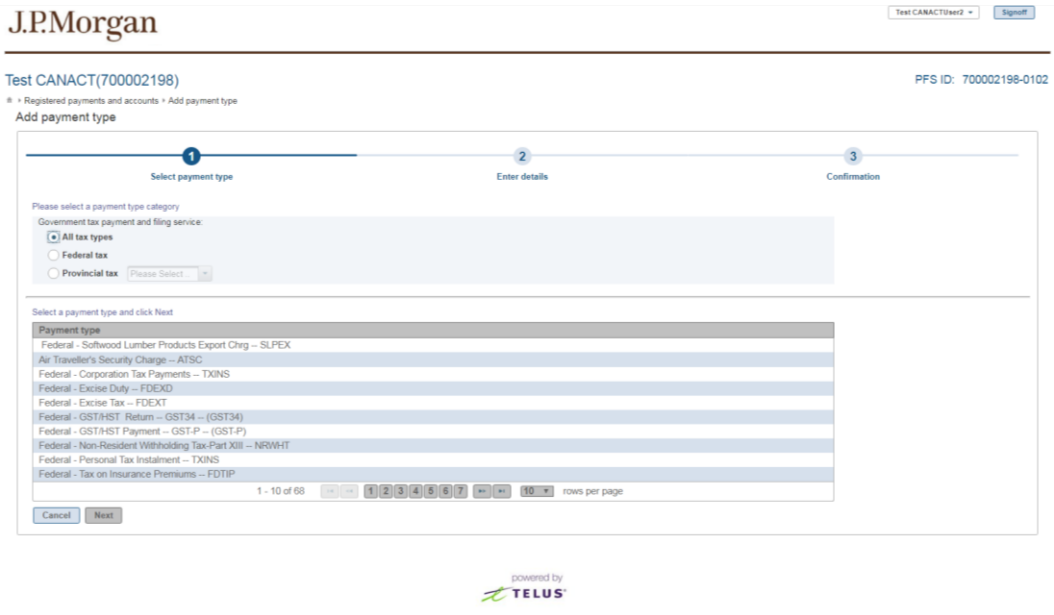
4. The Canada Tax Payment application has been enhanced to include bill payment capabilities. Clients who wish to subscribe to the service must reach out to their Relationship Manager to implement the service.

5. Subscribing clients have the option to choose either one or both of the services (tax and/or bill payments). The page for Add Payment type now will vary based on the services used by the client. The service combination are as follows:

    i. Tax Filing and Payment service only (transit 1000)
    ii. Bill Payment service only (transit 2000)
    iii. Tax Payment and Bill Payment services (transit 3000)

    The current screen for Add Payment Type is below. This will be same for the clients that continue to use only Tax Filing and Payment service (transit 1000).



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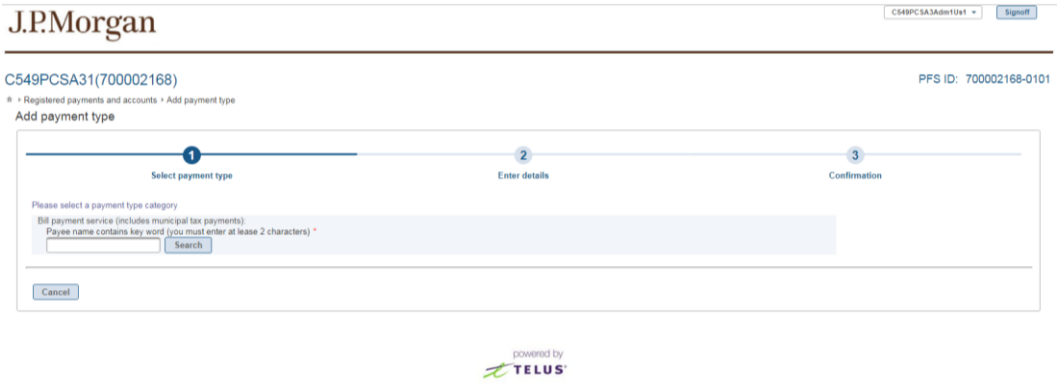
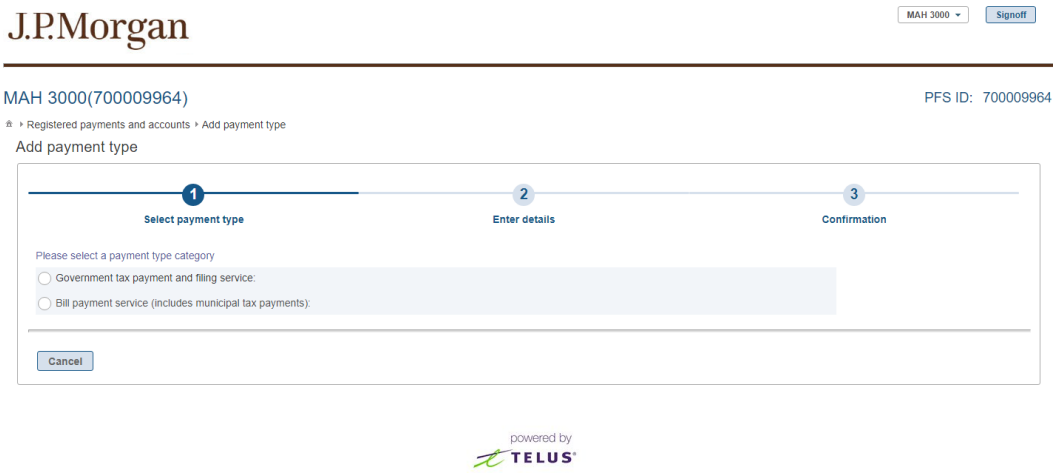
Users signed up for Bill Payment service only (transit 2000), will proceed to the page below.



Users signed up for both, Tax and Bill Payment service (transit 3000), will proceed to the following page where they must select the payment type to category to add.



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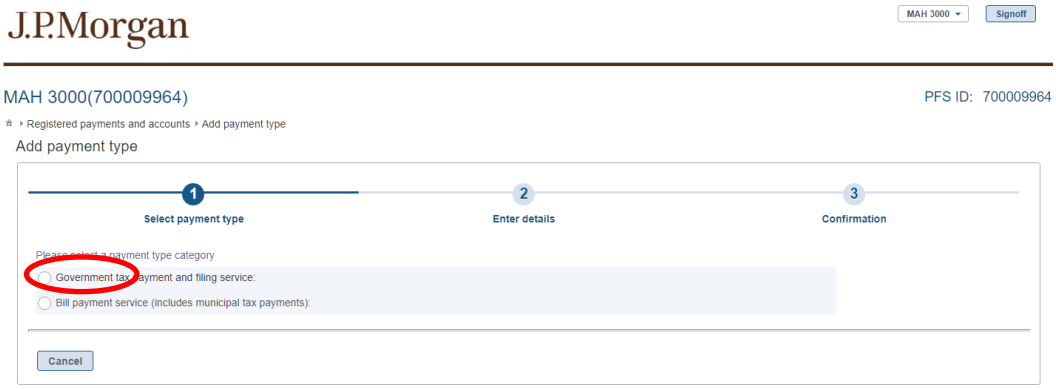
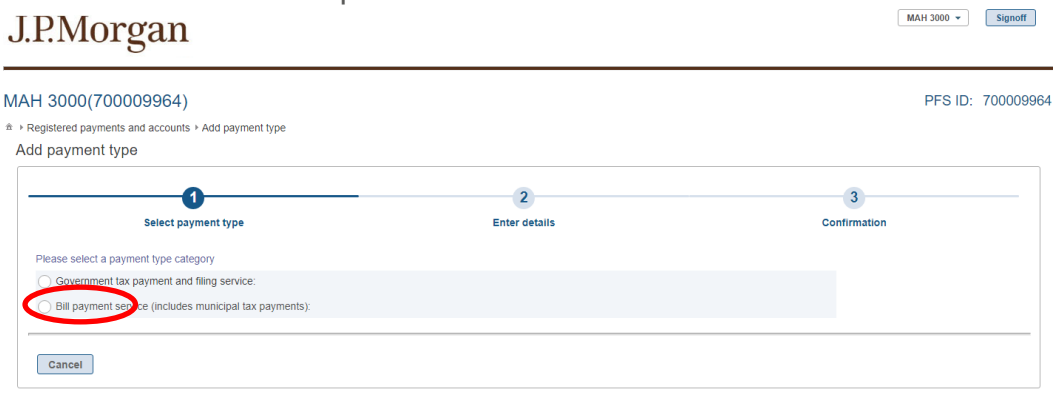
6. The steps to add payment types for the tax payments remains the same except for service transit 3000 users who have to select the Government tax payment and filing service option and then follow the existing steps for adding tax payment types.



7. To add Bill Payees, Service transit 3000 users need to select the Bill Payment service (includes municipal tax payments) option to proceed to the add payment type page for the service transit 2000 users in step 5.



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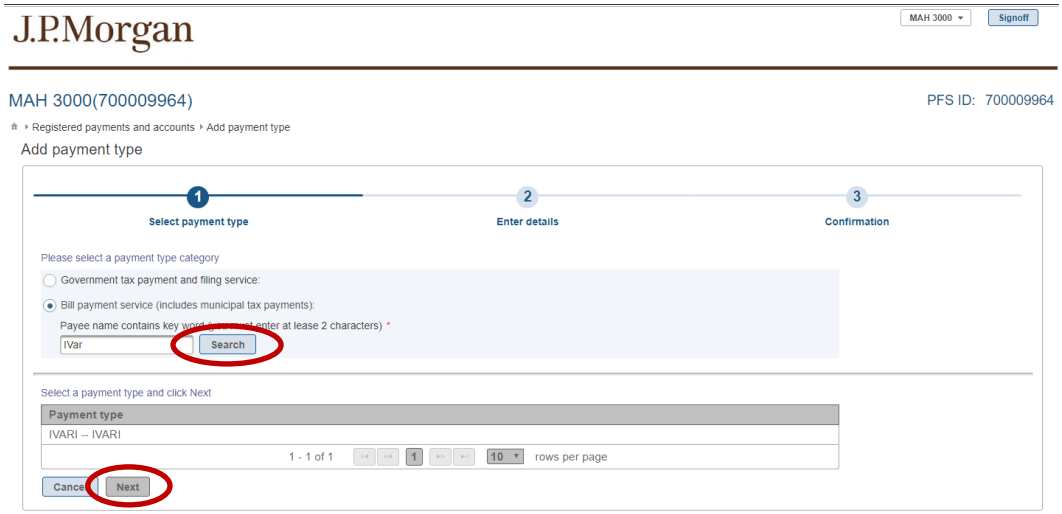
Enter the search criteria in the search box and click on **Search**



Select desired option from the search results and click **Next**. You will be navigated to the confirmation page where the system will display confirmation message.

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8. Once one or more payees have been successfully set up, payment transactions can be initiated.

   Access the Registered payments and accounts page. Select the desired Payee and click **Pay** to proceed to the Make a Payment page

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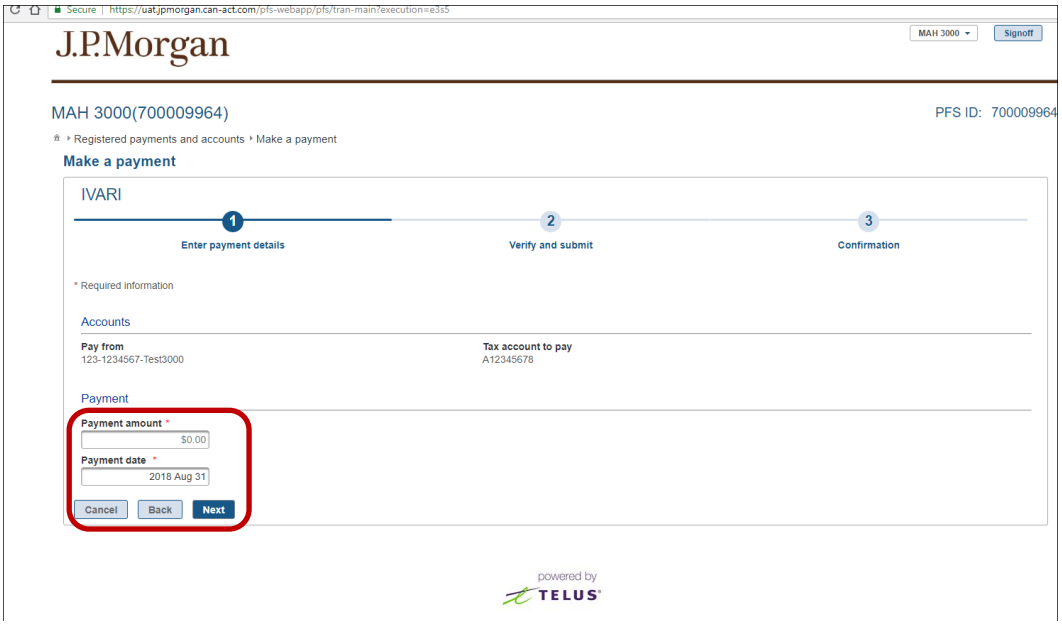
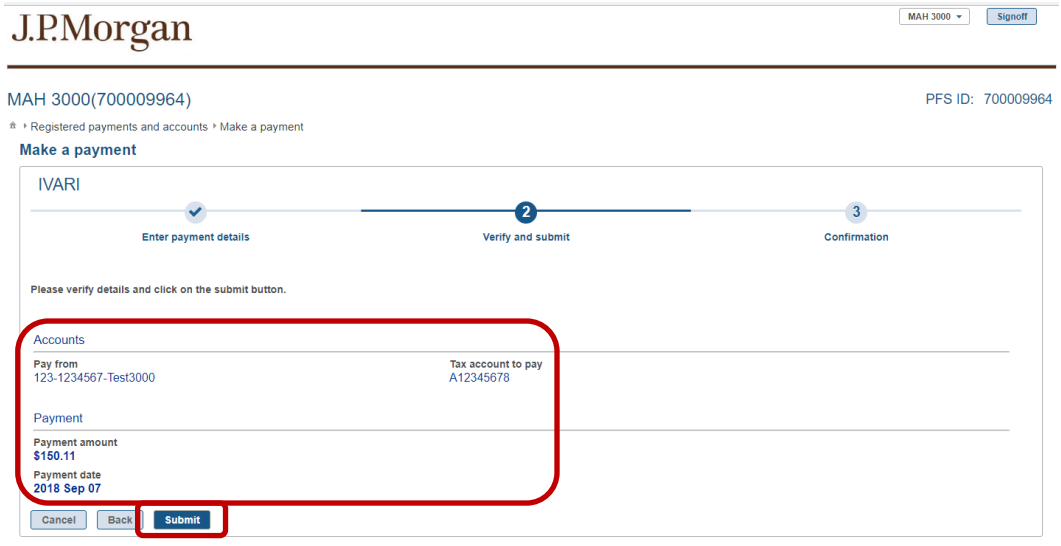
Enter the payment amount and the payment value date in the appropriate boxes and click **Next** to proceed to the verify and submit page



On the “verify and submit” page, you will be able to view the recipient details and the transaction amount and value date. Please verify that they are accurate. If changes are needed, click **Back**. If the information is accurate, click Next to proceed to the Confirmation page.



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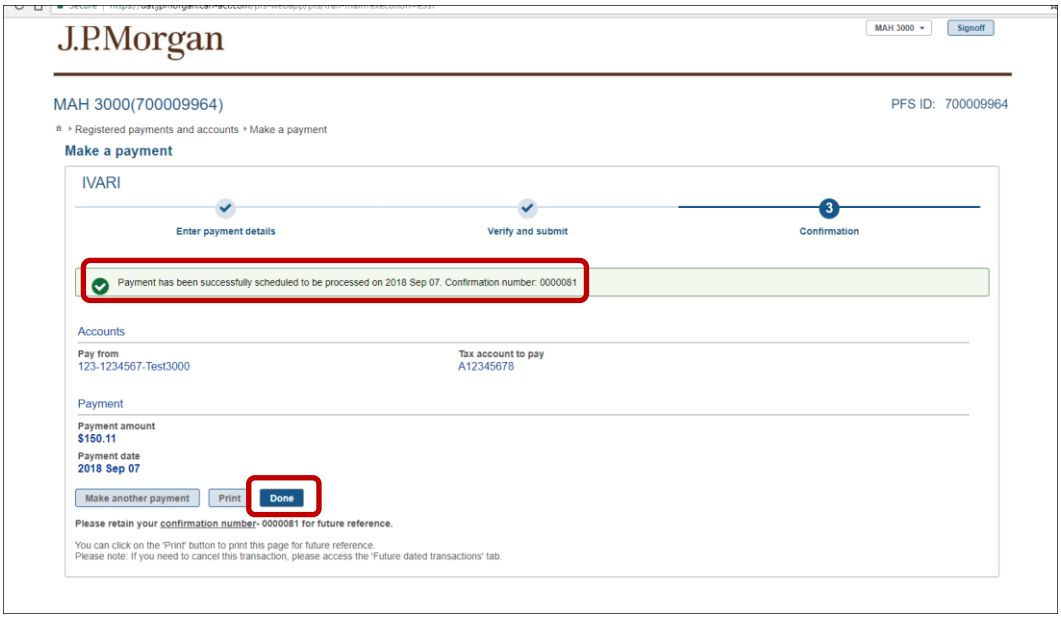
The confirmation page will display the transaction detail again and display message confirming if the payment has been scheduled to be processed. Click **Done** to go back to the Make a payment main page.



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