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

Introduction

The upgraded J.P. Morgan Canada Bill Payment site features new Bulk Approval functionality to enable clients to select up to 50 transactions at a time for bulk approvals.

1. Starting August 7, 2023, all existing Canada Bill Pay clients will have the option to use the new Bulk Approval feature. With this new functionality, clients will be able to provide Bulk Approval for the following transaction types:

    i. Approve pending bill payments

    ii. Cancel pending bill payments

    iii. Approve cancelled payments

    iv. Acknowledge expired payments

    Note: The default status when a user visits the Transaction approvals screen is 'Show all transactions'. When this option is selected, the screen will behave the same as it currently does.

2. The second grouping is for bulk approvals. If any of the 'bulk approval' options are selected checkboxes will be displayed next to every row, with the option of actioning up to 50 transactions at a time.
3. If the user clicks on the 'Select all' check box, then all payments in the list will be selected.
4. The user may check or uncheck any individual row.
5. Once complete, select the 'Approve' button at the bottom of the table.

| Registered payments and accounts | Multiple bill payments | View/cancel future transactions | Transaction history | Transaction approvals | |

Transactions Pending Approval

Click on a row to view details and to approve: ◯ Show all transactions

or

BILL PAYMENTS ONLY - Choose status to perform bulk approvals: ⦿ Approve pending bill payments
(select individual check boxes or select all with top check box)   ◯ Cancel pending bill payments
◯ Approve cancelled bill payments
◯ Acknowledge expired bill payments

ℹ️ Please note bulk approvals across pages are not allowed. Page navigation buttons will be hidden once a transaction is selected.

☑	Transaction type	Payment date	Amount	Account number	Status	Approved/Required
☑	VANCO	2023 Jul 27	$31,000.15	1111111	Pending approval	1/2
☑	CANAD	2023 Jul 27	$31,000.15	999T99999990001	Pending approval	1/2
☑	CANAD	2023 Jul 27	$51,000.15	999T99999990001	Pending approval	0/2
☑	VANCO	2023 Jul 27	$51,000.15	1111111	Pending approval	0/2
☑	CANAD	2023 Jul 27	$21,000.15	999T99999990001	Pending approval	1/2
☑	VANCO	2023 Jul 27	$21,000.15	1111111	Pending approval	1/2

Approve

Note: User will not be able to select transactions across multiple pages.

6. User will see a pop-up message "Please wait for few moments while we process your request. Do not refresh page until results are displayed"

7. Once complete, the transaction status and confirmation number will be displayed for all selected transactions. The status displayed will be as follows:
    i. 'Approval successful' if the approval was successful
    ii. 'Already approved' if payments already approved by same/another user
    iii. 'Payment expired' if payment already expired
    iv. 'Approval failed' for all other failures

8. The screen will have a 'Back' button to allow the user to go back to the previous screen. The approval option previously selected will be retained and the application will retrieve the next result set from the database for that option.

| | Registered payments and accounts | Multiple bill payments | View/cancel future transactions | Transaction history | Transaction approvals | |

Transaction Pending Approvals - Bulk approval results

The results of the pending payments selected for approval are shown below.

Click on the 'Back' button to go back to the previous screen.

Transaction type	Payment date	Amount	Account number	Status	Approved/Required	Confirmation
VANCO	2023 Jul 27	$31,000.15	1111111	To be processed	2/2	rwO-6073525
CANAD	2023 Jul 27	$31,000.15	999T99999990001	To be processed	2/2	rwT-6073575
CANAD	2023 Jul 27	$51,000.15	999T99999990001	Pending approval	1/2	Approval successful
VANCO	2023 Jul 27	$51,000.15	1111111	Pending approval	1/2	Approval successful
CANAD	2023 Jul 27	$21,000.15	999T99999990001	To be processed	2/2	rwS-6073565
VANCO	2023 Jul 27	$21,000.15	1111111	To be processed	2/2	rwN-6073515

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9. If the user selects the 'Cancel pending bill payments' option from the bulk approval section, then the application will display all pending approvals with 'Pending approval' status. The steps to 'Select all' and check or uncheck an individual row, remain the same as above.

| | Registered payments and accounts | Multiple bill payments | View/cancel future transactions | Transaction history | Transaction approvals | |

Transactions Pending Approval

Click on a row to view details and to approve: ◯ Show all transactions

or

BILL PAYMENTS ONLY - Choose status to perform bulk approvals: ◯ Approve pending bill payments
(select individual check boxes or select all with top check box)   ● Cancel pending bill payments
    ◯ Approve cancelled bill payments
    ◯ Acknowledge expired bill payments

ℹ Please note bulk approvals across pages are not allowed. Page navigation buttons will be hidden once a transaction is selected.

☑	Transaction type	Payment date	Amount	Account number	Status	Approved/Required
☑	CANAD	2023 Jul 27	$51,000.15	999T99999990001	Pending approval	1/2
☑	VANCO	2023 Jul 27	$11,000.15	1111111	Pending approval	0/2
☑	VANCO	2023 Jul 27	$21,000.15	1111111	Pending approval	0/2
☑	CANAD	2023 Jul 27	$11,000.15	999T99999990001	Pending approval	0/2
☑	VANCO	2023 Jul 27	$51,000.15	1111111	Pending approval	1/2
☑	CANAD	2023 Jul 27	$21,000.15	999T99999990001	Pending approval	0/2

Cancel Transactions

10. Once complete, the transaction status will be displayed for all selected transactions. The status displayed will be as follows:
    i. 'Cancellation successful' if the transaction was cancelled successfully
    ii. 'Cancellation failed' if the cancellation was not successful

11. The screen will have a 'Back' button to allow the user to go back to the previous screen. The approval option previously selected will be retained and the application will retrieve the next result set from the database for that option.

| Registered payments and accounts | Multiple bill payments | View/cancel future transactions | Transaction history | Transaction approvals | |

Transaction Pending Approvals - Bulk approval results

The results of the pending payments selected for cancellation are shown below.

Click on the 'Back' button to go back to the previous screen.

Transaction type	Payment date	Amount	Account number	Status	Approved/Required	Confirmation
CANAD	2023 Jul 27	$51,000.15	999T99999990001	Cancellation Request	N/A	Cancellation successful
VANCO	2023 Jul 27	$11,000.15	1111111	Cancellation Request	N/A	Cancellation successful
VANCO	2023 Jul 27	$21,000.15	1111111	Cancellation Request	N/A	Cancellation successful
CANAD	2023 Jul 27	$11,000.15	999T99999990001	Cancellation Request	N/A	Cancellation successful
VANCO	2023 Jul 27	$51,000.15	1111111	Cancellation Request	N/A	Cancellation successful
CANAD	2023 Jul 27	$21,000.15	999T99999990001	Cancellation Request	N/A	Cancellation successful

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12. If the user selects the 'Approve cancelled pending bill payments' option from the bulk approval section, then the application will display all pending cancellations of previously approved transactions with 'Queued for cancellation' status where the user is entitled to do the cancellation. The steps to 'Select all' and check or uncheck an individual row, remain the same as above. Note: To cancel approved transactions, user will need to go to the View/cancel future transactions tab and cancel each transaction individually. Another user that is entitled to do cancellations is then able to bulk approve the cancellations.

13. For the bulk approval of cancelled bill payments, the status screen will be displayed as follows:
    i.   'Approval successful' if the transaction cancellation approval was successful
    ii.   'Already approved' if the cancellation is already approved by same/another user
    iii. 'Payment expired' if payment already expired
    iv.   'Approval failed' if cancellation approval was not successful

14. The screen will have a 'Back' button to allow the user to go back to the previous screen. The approval option previously selected will be retained and the application will retrieve the next result set from the database for that option.

| Registered payments and accounts | Multiple bill payments | View/cancel future transactions | Transaction history | Transaction approvals | |

Transaction Pending Approvals - Bulk approval results

The results of the pending cancellations selected for approval are shown below.

Click on the 'Back' button to go back to the previous screen.

Transaction type	Payment date	Amount	Account number	Status	Approved/Required	Confirmation
VANCO	2023 Jul 27	$31,000.15	1111111	Queued for cancellation	1/2	Approval successful
VANCO	2023 Jul 27	$41,000.15	1111111	Cancellation Request	2/2	rwJ-6073475
VANCO	2023 Jul 27	$11,000.15	1111111	Queued for cancellation	1/2	Approval successful
CANAD	2023 Jul 27	$41,000.15	999T99999990001	Cancellation Request	2/2	rwL-6073495
CANAD	2023 Jul 27	$31,000.15	999T99999990001	Queued for cancellation	1/2	Approval successful
CANAD	2023 Jul 27	$11,000.15	999T99999990001	Queued for cancellation	1/2	Approval successful

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15. If the user selects the 'Acknowledge expired bill payments' option from the bulk approval section, then the application will display all pending approvals with 'Expired' status. The steps to 'Select all' and check or uncheck an individual row, remain the same as above.

16. Once complete, the transaction status will be displayed for all selected transactions. The status displayed will be as follows:
    i.   'Acknowledge successful' if the transaction acknowledgment was successful
    ii. 'Acknowledge failed' if the acknowledgement was not successful

17. The screen will have a 'Back' button to allow the user to go back to the previous screen. The approval option previously selected will be retained and the application will retrieve the next result set from the database for that option.

| Registered payments and accounts | Multiple bill payments | View/cancel future transactions | Transaction history | Transaction approvals | |

Transaction Pending Approvals - Bulk approval results

The results of the expired payments selected for acknowledgment are shown below.

Click on the 'Back' button to go back to the previous screen.

Transaction type	Payment date	Amount	Account number	Status	Approved/Required	Confirmation
VANCO	2023 Jul 26	$30,000.50	1111111	Expired acknowledged	N/A	Acknowledge successful
VANCO	2023 Jul 26	$30,000.50	1111111	Expired acknowledged	N/A	Acknowledge successful
VANCO	2023 Jul 26	$30,000.50	1111111	Expired acknowledged	N/A	Acknowledge successful
CANAD	2023 Jul 26	$315,000.50	999T99999990001	Expired acknowledged	N/A	Acknowledge successful
CANAD	2023 Jul 26	$315,000.50	999T99999990001	Expired acknowledged	N/A	Acknowledge successful
CANAD	2023 Jul 26	$315,000.50	999T99999990001	Expired acknowledged	N/A	Acknowledge successful

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