

J.P.Morgan

Proxy Administrator Go-To Guide

Overview

Summary

A proxy admin is an additional administrator requested by the primary admin to support various day-to-day administrative tasks on Connect. Proxy admins do not have the full rights of a primary admin and can only see and manage the companies, accounts and services a primary admin grants them access to.

The primary admin can request any authorized user to become a proxy admin and set up to 3 total proxy admins. Proxy admins will be displayed in the system administrator's section with a role of proxy admin.

Table of Contents

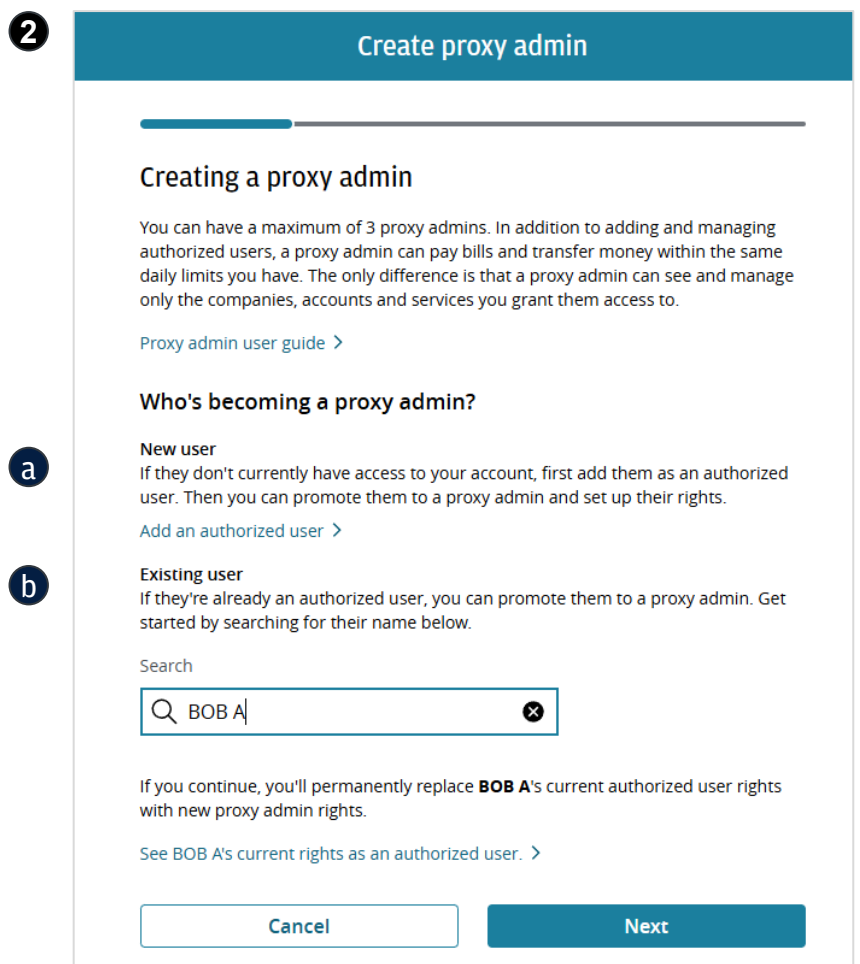
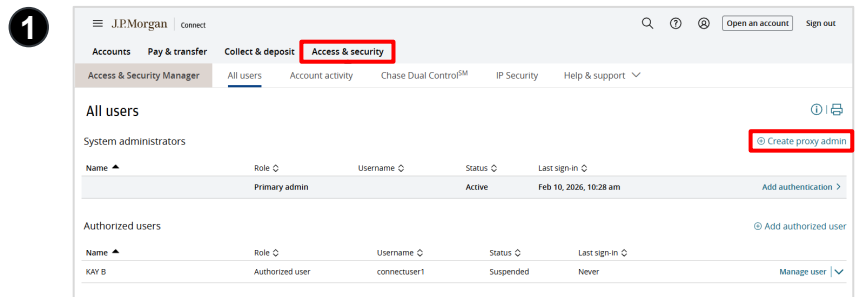
- I. [Connect User Rights](#)
- II. [Creating a Proxy Admin](#)
- III. [Choosing a Secure Authenticator](#)
- IV. [Choosing Proxy Admin Rights](#)

Connect User Rights

Functionality	Primary Admin	Proxy Admin	Authorized User
Add new proxy admin and manage proxy admin rights	Yes	No	No
Add new authorized user	Yes	Yes	No
Manage authorized user personal info & online access (ex: name, username, phone, suspend/restore access, remove user, reset password, etc.)	Yes	Yes	No
Manage authorized user profile, company and account level rights, daily transaction limits and approval threshold	Yes	Yes, for entitled companies, accounts, and services	No
As part of Chase Dual Control SM -Administration, approve changes made to authorized user info or rights	Yes	Yes, for entitled companies, accounts, and services	No
View and transact on accounts	Yes	Yes, for entitled accounts	Yes, for entitled accounts
Enroll in move money services (ex: Wires, ACH Payments, Cashflow360, etc.)	Yes	No	No
Activate Chase Dual Control (ex: Administration, Transaction) or Fraud Protection Services	Yes	No	No
Approve pending Chase Dual Control SM -Transactions	Yes	Yes, for entitled accounts	Yes, for entitled accounts

Creating a Proxy Admin

1. Select **Create proxy admin** on the **All Users** page
2. There are two options to create a proxy admin:
 - a. **New user:** If selected, create an authorized user from scratch and then add proxy admin rights
 - b. **Existing user:** If selected, the user's name, past activity, and profile ID will remain intact. However, all existing rights will be permanently deleted and replaced by new proxy admin rights once the request to elevate to proxy admin is submitted



Choosing a Secure Authenticator

1. Enhance online account security by choosing one of the following token options:
 - a. **RSA Authenticator App (recommended):** Download the app, available on iOS or Android. Enjoy the convenience of accessing token directly from a smartphone
 - b. **RSA Authenticator Device:** Receive a physical device, which will be mailed to the address provided
2. Review the user details and token request, then confirm by selecting **Set up now**

1

Set up multifactor authentication


Choose an authentication method

After adding an RSA Authenticator App or Device, you'll need to enter a unique token code generated by that authenticator every time you sign in.

a

RSA Authenticator App


Download a third-party mobile app and start using multifactor authentication immediately.

 Download the RSA Authenticator App on iOS® or Android™.

b

RSA Authenticator Device

Get a token code from a physical device. We'll mail it to the address we have on file within 2 business days.

 To change this address, contact your client-service professional.
Primary business mailing address

Next

2

Set up multifactor authentication

Does everything look OK?

User info

First name	User
Last name	—

Multifactor authentication

Authentication method	RSA Authenticator App
-----------------------	-----------------------

Set up now

Choosing Proxy Admin Rights

Once a proxy admin is created, rights must be assigned to them

The proxy admin can see and manage only companies, accounts and services they have been assigned rights for. These rights also enable them to see and transact within the same daily limits the primary admin can, unless changed

1. Select **Full access** or choose the specific account(s) and services the proxy admin should be entitled to. Options will vary based on account type
 - a. Once submitted, you will receive an automated email with further instructions on how to complete the proxy admin set up

1

Set up proxy admin

Choose proxy admin rights

The proxy admin can use Access & Security Manager to add and manage authorized users like you do. The only difference is that they can see and manage only those companies, accounts and services that you assign them rights to. These rights also enable them to see and transact with the same daily limits that you have.

We don't currently support proxy admin access to merchant accounts.

User rights

Profile-level

Third-Party App Access ⓘ

Company & account-level Full access

You can give your user access to all rights by choosing "Full access" or "Choose all" at the company or account level. Changing access rights within any company or account may affect your overall access.

Choose all

▼ User

User has access to 1 / 1 accounts

Choose all

▼ COMM CHKG

General services

Approve pending transactions
Must be assigned to at least 1 user for profiles with Chase Dual Control Transaction activated.

See activity and balance

See check images

See statements and documents ⓘ

Incoming services

Chase, J.P. Morgan, JPMorgan, JPMorgan Chase, and Story by J.P. Morgan are marketing names for certain businesses of JPMorgan Chase & Co. and its affiliates and subsidiaries worldwide (collectively, "JPMC", "We", "Our" or "Us", as the context may require).

The information in this content (website, article, event invitation or other form) does not represent an offer or commitment to provide any product or service. The views, opinions, analyses, estimates and strategies, as the case may be ("views"), expressed in this content are those of the respective authors and speakers named in those pieces, and/or the JPMC departments that publish the content, and may differ from those of JPMorgan Chase Commercial Banking and/or other JPMC employees and affiliates. These views are as of a certain date and often based on current market conditions, and are subject to change without notice. Any examples used are generic, hypothetical and for illustration purposes only. Any prices/quotes/statistics included have been obtained from sources deemed to be reliable, but we do not guarantee their accuracy or completeness. To the extent indices have been used in this content, please note that it is not possible to invest directly in an index. This information in no way constitutes research and should not be treated as such. Any information related to cybersecurity provided is intended to help clients protect themselves from cyber fraud, not to provide a comprehensive list of all types of cyber fraud activities nor to identify all types of cybersecurity best practices.

Copying, re-publishing, or using this material or any of its contents for any other purpose is strictly prohibited without prior written consent from JPMorgan. In preparing this material, we have relied upon and assumed, without independent verification, the accuracy and completeness of all information that was acquired from public sources. Any mentions of third-party trademarks, brand names, products and services are for referential purposes only and any mention thereof is not meant to imply any sponsorship, endorsement, or affiliation unless otherwise noted. Notwithstanding anything to the contrary, the statements in this material are not intended to be legally binding. Any products, services, terms or other matters described herein (other than in respect of confidentiality) are subject to, and superseded by, the terms of separate legally binding documentation and/or are subject to change without notice.

The information in this content is not advice on legal, tax, investment, accounting, regulatory, technology or other matters. You should always consult your own financial, legal, tax, accounting or similar advisors before making any financial or investment decisions, or entering into any agreement for JPMC products or services. In no event shall JPMC or any of its directors, officers, employees or agents be liable for any use of, for any decision made or action taken in reliance upon, or for any inaccuracies or errors in or omissions from, the information in this content. We are not acting as your or any client's agent, fiduciary or advisor, including, without limitation, as a Municipal Advisor under the Securities and Exchange Act of 1934. JPMC assumes no responsibility or liability whatsoever to you or any client with respect to such matters, and nothing herein shall amend or override the terms and conditions in the agreement(s) between JPMC and any client or other person.

The information in this content does not include all applicable terms or issues, and is not intended as an offer or solicitation for the purchase or sale of any product or service. Our products and services are subject to applicable laws and regulations, as well as our service terms and policies. Not all products and services are available in all geographic areas or to all customers. In addition, eligibility for particular products and services will be determined by JPMC, including satisfaction of applicable legal, tax, risk, credit and other due diligence, and JPMC's "know your customer", anti-money laundering, anti-terrorism and other policies and procedures. Credit is subject to approval. Rates and programs are subject to change. Certain restrictions apply.

Products and services may be provided by banking affiliates, securities affiliates or other JPMC affiliates or entities. In particular, securities brokerage services other than those that can be provided by banking affiliates will be provided by appropriate registered broker/dealer affiliates, including J.P. Morgan Securities LLC and J.P. Morgan Institutional Investments Inc. Any securities provided or otherwise administered by such brokerage services are not deposits or other obligations of, and are not guaranteed by, any banking affiliate and are not insured by the Federal Deposit Insurance Corporation. Certain financial products and services are required by law to be provided only by licensed representatives and affiliates. Inquiries regarding such products and services will be referred to a licensed representative or a licensed affiliate. The information in this content is not an offer to sell, or solicit an offer to purchase, any securities by anyone in any jurisdiction in which such offer or solicitation is not authorized, or in which JPMC or the person making such an offer is not qualified to do so, or to anyone to whom it is unlawful to make such an offer or solicitation, or to anyone in any jurisdiction outside of the United States. Nothing in this content constitutes any commitment by JPMC to underwrite, subscribe for or place any securities, or to extend or arrange credit, or to provide any other product or service. JPMC contact persons may be employees or officers of any JPMC subsidiary or affiliate.