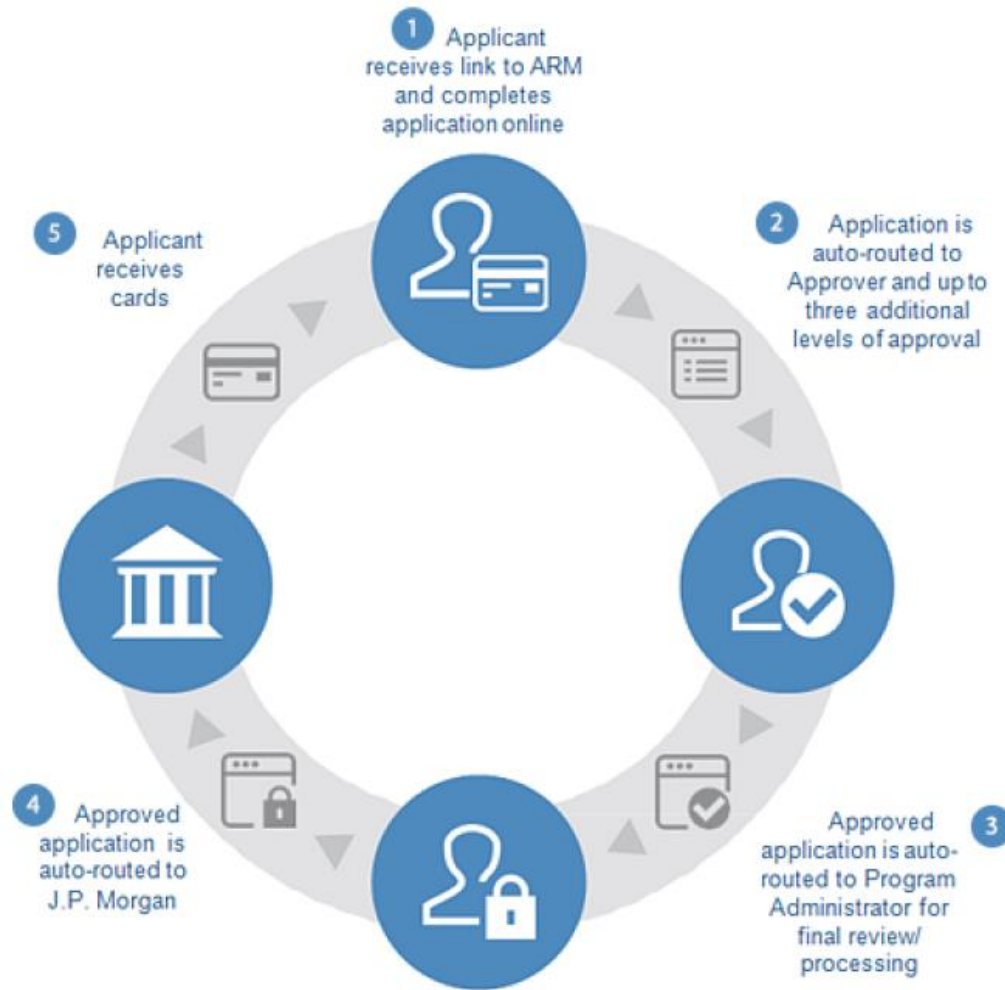




For Approvers: Approval Process for Online P-Card Applications

J.P. Morgan's Account Request Manager (ARM), is a module of PaymentNet[®] that automates J.P. Morgan's Commercial Card application, submission, approval and fulfillment process. The following figure provides an overview of the ARM workflow tasks.



APPROVALS

There are two levels of approvals for a Purchasing Card (P-Card) application: Level 1: Expense Approver and Level 2: Budget Owner.

1) Level 1 Approval: Expense Approver

- Once an applicant completes and submits their application, the Expense Approver will receive an email from J.P. Morgan requesting you to review and approve the application. This email will look similar to the sample image below.

**For Approvers:
Approval Process for Online P-Card Applications**



N no.replies@paymentnet.jpmorgan.com
A commercial card application requires your approval
To Procurement P-Card

Caution: This message came from outside of Drexel. Do not click links or attachments unless you expected this email.

Dear P-Card Office:

A J.P. Morgan Commercial card application has been submitted by JANE DOE. This application requires your approval to proceed to account creation. Please click on the link below to access the application for your review.

<https://www.paymentnet.jpmorgan.com/arm/public/Arm.html#apprd028ea1e-9039-45dd-9c01-7974b4a1c337>

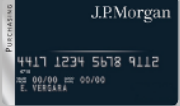
Please attend to this review no later than 05/19/2019.

Thank you.

****Please do not respond to this e-mail. Any response to this e-mail address will not be seen. Please contact your program administrator if you need assistance****

- b. Please click the link in the email to review the application.
- c. While reviewing the application, you can contribute information in the fields as necessary. Required fields are identified by a red asterisk and will only appear in the Approval section if the template is set up to display them.

Drexel University Travel P-Card Application **Purchasing Card**



You have been assigned the following commercial card application for review. If applicable, complete or modify the fields below. Once your review is complete, approve or reject the application. If rejecting, enter a comment indicating the reason.

- * Required Fields

Additional Instructions from your Organization

You have been assigned the following Drexel University Travel P-Card application for review. If applicable, complete or modify the fields below. Once your review is complete, approve or reject the application. If rejecting, enter a comment indicating the reason. Please review the P-Card Policy and Guidelines: <https://drexel.edu/procurement/makingPurchases/pcard/>. By approving this application, you agree to abide by the P-Card Policy, Guidelines, and all other policies set forth by Drexel University. If you have any questions, please contact pcard@drexel.edu

The information contained in the instructions noted above is not provided by J.P. Morgan Chase Bank, N.A. or its subsidiaries or affiliates (collectively referred to as "Chase"). Chase is not responsible for and does not endorse the policies, procedures, or overall content provided in the instructions noted above.

I reviewed the P-Card Policy/Guidelines Yes

▼ Applicant Information

Full First Name Jane
Last Name Doe
Drexel Employee Id ****5678

**For Approvers:
Approval Process for Online P-Card Applications**



d. Processing an Application

- Once your review is complete, you can take one of the following actions:
 - i. **Assign the next approver and approve the application.**
 - Next Approval – (Required)
 - Configuration requires you to direct applications to the next approver by entering the Budget Approver’s name and email address.

A screenshot of a web application interface for P-Card approval. At the top, there is a dropdown menu labeled "Approval". Below it, a message reads: "Cardholder: Please complete the fields below to send the application to your Expense Approver. Expense Approver: Please complete the fields below to send the application to your Budget Owner. Contact pcard@drexel.edu for any questions." The interface shows the current approver as "Approver 1 P-Card Office" with the email "p***d@drexel.edu". A section titled "Next Approval - Required" contains four input fields: "First Name*" with "Procurement", "Last Name*" with "Services", "Email Address*" with "Pcard@drexel.edu", and "Confirm Email Address*" with "Pcard@drexel.edu". A green message "Email addresses match" is displayed below the confirm field.

- ii. **Reject the application.**
 - If rejecting the application, please enter the reason in the comment section.
- iii. **Cancel your session.**
 - You can return later to finish the approval process.

For additional support resources, or if you have any questions about the approval process for a commercial card application, please contact TandE@drexel.edu.

2) Level 2 Approval: Budget Owner

- a. After the Expense Approver approves the application, the Budget Owner will receive an email from J.P. Morgan requesting you to review and approve an application.

**For Approvers:
Approval Process for Online P-Card Applications**



N no.replies@paymentnet.jpmorgan.com
A commercial card application requires your approval
To Procurement P-Card

Caution: This message came from outside of Drexel. Do not click links or attachments unless you expected this email.

Dear P-Card Office:

A J.P. Morgan Commercial card application has been submitted by JANE DOE. This application requires your approval to proceed to account creation. Please click on the link below to access the application for your review.

<https://www.paymentnet.jpmorgan.com/arm/public/Arm.html#apprd028ea1e-9039-45dd-9c01-7974b4a1c337>

Please attend to this review no later than 05/19/2019.

Thank you.

****Please do not respond to this e-mail. Any response to this e-mail address will not be seen. Please contact your program administrator if you need assistance****

- b. Please click the link in the email to review the application
- c. While reviewing the application, you can contribute information in the fields as necessary. Required fields are identified by a red asterisk and will only appear in the Approval section if the template is set up to display them.

Drexel University Travel P-Card Application **Purchasing Card**

You have been assigned the following commercial card application for review. If applicable, complete or modify the fields below. Once your review is complete, approve or reject the application. If rejecting, enter a comment indicating the reason.

* Required Fields

Additional Instructions from your Organization

You have been assigned the following Drexel University Travel P-Card application for review. If applicable, complete or modify the fields below. Once your review is complete, approve or reject the application. If rejecting, enter a comment indicating the reason. Please review the P-Card Policy and Guidelines: <https://drexel.edu/procurement/makingPurchases/pcard/>. By approving this application, you agree to abide by the P-Card Policy, Guidelines, and all other policies set forth by Drexel University. If you have any questions, please contact pcard@drexel.edu

The information contained in the instructions noted above is not provided by J.P. Morgan Chase Bank, N.A. or its subsidiaries or affiliates (collectively referred to as "Chase"). Chase is not responsible for and does not endorse the policies, procedures, or overall content provided in the instructions noted above.

I reviewed the P-Card Policy/Guidelines Yes

▼ Applicant Information

Full First Name Jane
Last Name Doe
Drexel Employee Id ****5678

**For Approvers:
Approval Process for Online P-Card Applications**



- d. Processing an Application
 - Once your review is complete, you can take one of the following actions:

- i. Approve the application.**

A screenshot of a web application interface for approving P-Card applications. The interface is divided into two main sections: "Approval" and "Comments".
The "Approval" section contains instructions for cardholders and approvers, and lists two approvers: "Approver 1 P-Card Office" (p***d@drexel.edu) and "Approver 2 Procurement Services" (j***7@drexel.edu).
The "Comments" section shows the applicant's information: "Applicant 05/15/2019 01:55:48 PM UTC-4" and "Limit Increase Adjustments". Below this is a "New Comment" section with a text input field. A red box highlights the input field and contains the text: "Add a comment if needed" and "Please add comments here, if applicable - Limit Changes - Additional Account Information etc.". At the bottom of the interface, there are three buttons: "Cancel", "Reject", and "Approve". A red line underlines the text "If rejecting, enter a reason in the Comments section above." between the "Reject" and "Approve" buttons.

- ii. Reject the application.**
 - If rejecting the application, please enter the reason in the comment section (shown in image above).
 - iii. Cancel your session.**
 - You can return at a later time to finish the approval process.

For additional support resources, or if you have any questions about the approval process for a commercial card application, please contact TandE@drexel.edu.