

Proxy Administrator Go To Guide

A **proxy admin** is an additional administrator requested by the primary admin to support various day-to-day administrative tasks on Chase 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 (see next slide for more detail)

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 administrators” section with a role of “Proxy admin”

The screenshot shows the Chase Connect interface. At the top, there is a navigation bar with 'CHASE CONNECT' and various menu items like 'Accounts', 'Pay & transfer', 'Collect & deposit', 'Account management', and 'Security'. Below this, there is a sub-navigation bar with 'Access & Security Manager', 'All users', 'Account Activity', 'Chase Dual ControlSM', 'IP Security', and 'Help & Support'. The main content area is titled 'All users' and shows a table of 'System administrators'. The table has columns for Name, Role, Username, Status, Security Token, and Last sign-in. Two users are listed: JOE DEMO (Primary admin) and JACK DEMO (Proxy admin). The 'Proxy admin' role for JACK DEMO is circled in red. There are also links for 'Replace token' and 'Manager User'.

Name ▲	Role ▼ ⓘ	Username ▼	Status ▼	Security Token ▼	Last sign-in ▼ ⓘ	
JOE DEMO	Primary admin	joedemo123	Active	007007175	Feb 16, 2024, 5:02:15 pm	Replace token >
JACK DEMO	Proxy admin	proxyadmin12345	Active	000000001		Manager User v

Chase 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, 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

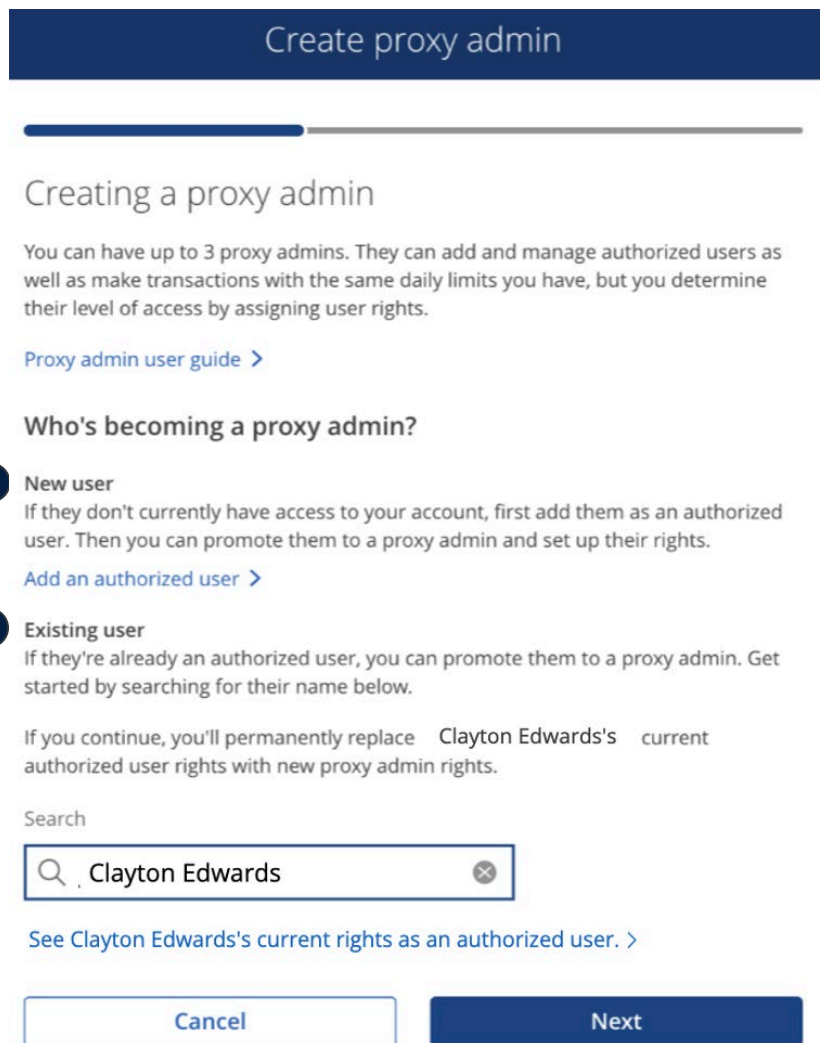
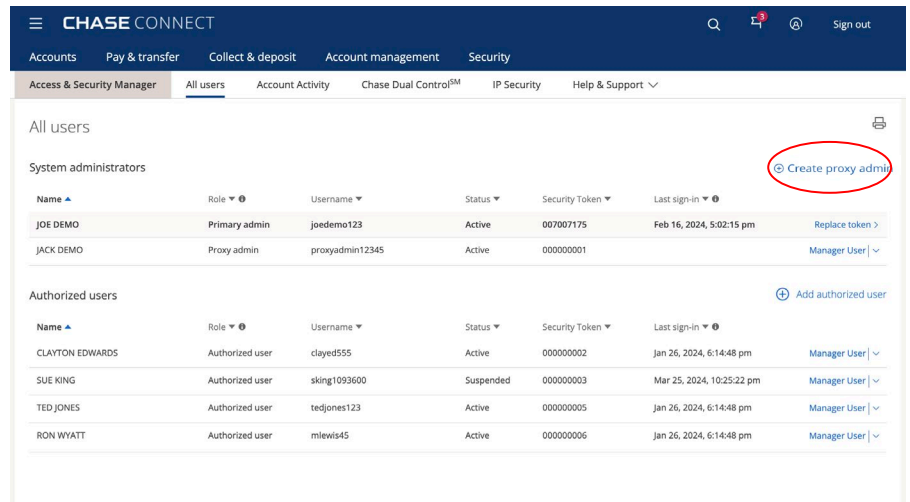
Creating a Proxy Admin

1. Select “Create Proxy Admin” on the “All Users” page

2. You will have two options to create a proxy admin:

1 **New user:** if selected, you will need to [create an authorized user](#) from scratch and then add proxy admin rights

2 **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 Proxy Admin Rights

Once the proxy admin is created, you will need to choose proxy admin rights

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

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

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

JOE DEMO

User has access to 0 / 4 accounts

Choose all

BUSINESS CARD

BUSINESS CARD 

Primary card

You must allow access to the primary card in order to assign additional entitlements.

General 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.