

# CHASE CONNECT® USER GUIDE

Proxy Administrator and  
Chase Dual Control<sup>SM</sup> -  
Administration



# All Users Overview

Navigate to the all users page to view users by role





The screenshot displays the CHASE CONNECT user interface. At the top, there is a navigation bar with the CHASE CONNECT logo and a 'Sign out' button. Below this is a secondary navigation bar with tabs for 'Accounts', 'Pay & transfer', 'Collect & deposit', and 'Account management'. The 'Account management' tab is active, and a dropdown menu is open, listing options: 'Profile & settings', 'Access & Security Manager', 'Service plan', 'Document Exchange', 'Open a new account', and 'Fraud protection'. A red circle with the number '1' is placed over the 'Access & Security Manager' option. A blue callout box with a white background and a blue border points to this option, containing the text: 'Under **Account management** select **Access & Security Manager**'. The background of the screenshot shows the 'Accounts' section for 'CRUZEN LLC', with a filter set to 'All accounts' and a list of banking accounts. A 'Summary' section on the right shows a timestamp 'Jul 29, 2019 at 10:40 AM ET' and a link for 'Premium Plus Details >'. A 'Customize settings >' link is also visible in the top right of the account details area.



CHASE CONNECT

Open an account

Accounts Pay & transfer Collect & deposit Account management

Access & Security Manager All users Account activity Chase Dual Control<sup>SM</sup> IP Security Help & support

### All users

System administrators + Add proxy admin

Name	Status	Security token	Last sign-in	
JOE DEMO	Active		Sep 9, 2019, 10:38:20 am	
SANDRA CHANG	Active		Sep 6, 2019, 3:17:13 pm	<a href="#">Manage user &gt;</a>
SUE KING	Suspended		Aug 13, 2019, 3:33:51 pm	<a href="#">Manage user &gt;</a>
CLAYTON EDWARDS	Proxy admin	clayed555	Active	Aug 21, 2019, 1:10:01 pm <a href="#">Manage user &gt;</a>

Authorized users + Add authorized user

Name	Role	Username	Status	Security token	Last sign-in	
TED JONES	Authorized user	tedjones123	Suspended			<a href="#">Manage user &gt;</a>
RON WYATT	Authorized user	mlewis45	Active		Jul 19, 2019, 8:34:18 pm	<a href="#">Manage user &gt;</a>

**2**

View **System administrators** (primary and proxy admins) and **Authorized users** on the **All users** page

# Adding a Proxy Admin

Only the primary admin can  
add a proxy admin





CHASE CONNECT

Open an account

Accounts Pay & transfer Collect & deposit **Account management**

Summary Account activity

Filter by All accounts

CRUZEN LLC

Banking accounts

Account Available bala

Profile & settings

Access & Security Manager **1**

Service plan

Document Exchange

Open a new account

Fraud protection

Under **Account management** select **Access & Security Manager**

Customize settings

Session summary

C....r@chase.com

Jul 29, 2019 at 10:40 AM ET

Service plan

Premium Plus [Details >](#)



CHASE CONNECT

Open an account

Accounts Pay & transfer Collect & deposit Account management

Access & Security Manager All users Account activity Chase Dual Control<sup>SM</sup> IP Security Help & support

### All users

System administrators

Click **Add proxy admin** to begin the setup process

2 + Add proxy admin

Name	Role	Username	Status	Last sign-in	Actions
JOE DEMO	Primary admin	joedemo123	Active	Sep 9, 2019, 10:38:20 am	
SANDRA CHANG	Proxy admin	sanityrel2	Active	Sep 6, 2019, 3:17:13 pm	<a href="#">Manage user &gt;</a>
SUE KING	Proxy admin	sking1093600	Suspended	Aug 13, 2019, 3:33:51 pm	<a href="#">Manage user &gt;</a>
CLAYTON EDWARDS	Proxy admin	clayed555	Active	Aug 21, 2019, 1:10:01 pm	<a href="#">Manage user &gt;</a>

Authorized users

+ Add authorized user

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RON WYATT	Authorized user	mlewis45	Active		Jul 19, 2019, 8:34:18 pm	<a href="#">Manage user &gt;</a>



CHASE CONNECT

Open an account

Sign out

Add new user

Tell us your activation code

Please contact your client service professional to request an activation code and enter it below.

Activation code

3

Cancel Next

You'll be prompted to add an **Activation code**. Enter your token code and click **Next**





CHASE CONNECT

Open an account ▾

Search 🔍

Sign out

### Add new user

#### User info

#### Adding proxy admins

You can add up to 3 proxy admins. After they're approved, proxy admins can use Access & Security Manager to add and manage all authorized users for the accounts and products you choose.

[Proxy admin user guide >](#)

Would you like to start with existing user?

Yes  No

**“Would you like to start with an existing user?”**  
Select **Yes** or **No** to begin the process

**Note:** Giving a proxy admin access to at least 1 service on an account will automatically enable them to approve transactions and see activity, balances, checks, documents and statements for that account. The proxy admin default transaction limits are equal to that of the primary admin.



Open an account ▾

CHASE CONNECT

Sign out

Add new user

### User info

#### Adding proxy admins

You can add up to 3 proxy admins. After they're approved, proxy admins can use Access & Security Manager to add and manage all authorized users for the accounts and products you choose.

[Proxy admin user guide >](#)

Would you like to start with existing user?

Yes  No

#### Authorized users

If you continue, you'll permanently replace CLAYTON EDWARDS's current authorized user rights with new proxy admin rights.

Q CLAYTON EDWARDS

[See CLAYTON EDWARDS's current rights as an authorized user. >](#)

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To choose an existing **Authorized user** use the search function to locate them and replace their current rights with proxy admin rights effective on our approval of the updated SADLF.

**Note:** Until the proxy admin set up is complete and approved the authorized user's profile will be inactive.



CHASE CONNECT

Open an account ▾

Search 🔍

Sign out

### Add new user

Confirm user info

Does everything look OK?

First name	CLAYTON
Last name	EDWARDS
Email	claytone2@yalevision.com
Phone	3122222222
Username	claytone2
Mobile access	YES

[6 Edit >](#)

**Click **Edit** to update the information for an existing authorized user**

**Review the their information and click **Add user****

Cancel

Back

**Add user**

**Note:** If you request an existing authorized user become a proxy admin, their rights as an authorized user are permanently deleted and replaced by the new proxy admin rights. However, their transaction history, account activity, password and SecurID token will remain intact.



☰ ⓘ ⚑ Open an account ▾ CHASE CONNECT 🔍 🔊 👤 Sign out

Add new user ✕

✔ You've confirmed Sandra Chang's details.

Next, you'll need to choose the level of administrative control for your proxy admin.

If you can't finish right now, you can come back later without losing anything you've done so far.

Back to all users

Next

8

Click **Next** to designate the administrative and transaction rights of the proxy admin



CHASE CONNECT

Open an account ▾

Accounts Pay & transfer Collect & deposit Account management

Access & Security Manager All users Account activity Chase Dual Control<sup>SM</sup> IP Security Help & support ▾

Proxy admin setup

### Choose proxy admin rights

The proxy admin will be able to use the Access & Security manager tool to add and manage new authorized users. The proxy admin will be able to assign, remove or edit an authorized user's rights for the companies, accounts and services you choose below. Keep in mind that the proxy admin will also be able to see and transact with daily transaction limits that match yours.

#### Profile-level rights

Third party app access ⓘ

Companies, accounts and services

YALE VISION INC.	Full access	On
COMMERCIAL CHECKING (...7890)		On
Make payments	Select all	<input checked="" type="checkbox"/>
ACH Payment Services—Employees ⓘ		<input checked="" type="checkbox"/>
ACH Payment Services—Vendors ⓘ		<input checked="" type="checkbox"/>
Bill pay ⓘ		<input checked="" type="checkbox"/>
Transfers and payments ⓘ		<input checked="" type="checkbox"/>
Wires		<input checked="" type="checkbox"/>
Get paid		
ACH Collections		<input checked="" type="checkbox"/>
General services	Select all	<input checked="" type="checkbox"/>
Approve transactions		<input checked="" type="checkbox"/>
See activity and balances		<input checked="" type="checkbox"/>
See check images		<input checked="" type="checkbox"/>
See statements and documents		<input checked="" type="checkbox"/>
COMMERCIAL SAVINGS (...5678)		

9 Enable the account for access

10 Select all or select individual service rights for the profile

**Note:** All proxy admin(s) will have these default capabilities for accounts they are entitled to:

1. Add new authorized users
2. Edit personal information of all authorized users
3. Manage access of all authorized users such as send temporary password, suspend/restore access, remove user, reset security code, request token and mobile device access

11 Click **Next**

Next



CHASE CONNECT

Open an account

Accounts Pay & transfer Collect & deposit Account management

Proxy admin setup

### Verify SANDRA CHANG's proxy admin rights

Manage rights [Edit](#)

- YALE VISION INC
  - COMMERCIAL CHECKING (...7890)
    - Make payments
      - ACH Payment Services--Employees
      - ACH Payment Services--Vendors
      - Bill pay
      - Transfers and payments
      - Wires
    - Get paid
      - ACH Collections

Review rights, edit as needed and click **Next**

Cancel Back **Next** 12



The screenshot shows the 'Proxy admin setup' page in the Chase Connect interface. The page has a dark blue header with the 'CHASE CONNECT' logo and navigation options like 'Accounts', 'Pay & transfer', 'Collect & deposit', and 'Account management'. A search bar and a 'Sign out' button are also present. The main content area is white and contains a green checkmark icon followed by the text: 'You've submitted a request to make SANDRA CHANG your proxy admin. We're reviewing your request and should process it within 2 business days of receiving the System Administrator Designation and Linking form.' Below this is a section titled 'Important next steps' with two bullet points: 'Complete and gather the required signatures on the [System Administrator Designation and Linking form](#) and email it to [chase.connect.forms@chase.com](mailto:chase.connect.forms@chase.com).' and 'Call your client service representative if you need more information.' A red circle with the number '13' points to the first bullet point. Below that is a section titled 'Chase Dual Control' with the text: 'Don't forget to activate [Chase Dual Control - Administration](#) through Access & Security Man... is an administrative procedure we recommend to help keep your profile secure.' A red circle with the number '14' points to this section. A blue callout box with a white background and a blue border contains the text: 'Click **Chase Dual Control - Administration** to activate an additional layer of security. You'll need at least one active proxy admin before enabling this feature.' To the right of this is another blue callout box with a white background and a blue border containing the text: 'The primary admin will receive an email with the [System Administrator Designation and Linking Form \(SADLF\)](#), need to coordinate execution of the form with the proxy admin and return this form via email to: [chase.connect.forms@chase.com](mailto:chase.connect.forms@chase.com)'. At the bottom left, a black box with white text contains a note: 'Note: To decrease downtime, complete the SADLF in advance of submitting the request to create a Proxy Admin'. At the bottom right, there is a blue button labeled 'Back to all users'.

# Manage Proxy Admin Rights

As the primary admin, you can add or manage rights for proxy admin(s) after we've approved your proxy admin request







The screenshot shows the Chase Connect web interface. At the top, there's a navigation bar with the Chase logo and 'CONNECT' text. Below it, a secondary navigation bar contains tabs for 'Accounts', 'Pay & transfer', 'Collect & deposit', and 'Account management'. The 'Account management' tab is active, and its dropdown menu is open, listing options: 'Profile & settings', 'Access & Security Manager', 'Service plan', 'Document Exchange', 'Open a new account', and 'Fraud protection'. A red circle with the number '1' is placed over the 'Access & Security Manager' option. A blue callout box with a white background and a blue border points to this option, containing the text: 'Under Account management select Access & Security Manager'. The background of the interface shows a list of accounts for 'CRUZEN LLC' with a filter set to 'All accounts'. On the right side, there's a 'Last session summary' section with a user icon and session details.



CHASE CONNECT

Open an account

Accounts Pay & transfer Collect & deposit Account management

Access & Security Manager All users Account activity Chase Dual Control<sup>SM</sup> IP Security Help & support

### All users

System administrators [Add proxy admin](#)

Name	Role	Username	Status	
JOE DEMO	Primary admin	joedemo123	Active	
SANDRA CHANG	Proxy admin	sanityrel2	Active	<a href="#">Manage user &gt;</a>
SUE KING	Proxy admin	sking1093600	Suspended	<a href="#">Manage user &gt;</a>
CLAYTON EDWARDS	Proxy admin	clayed555	Active	Aug 21, 2019, 1:10:01 pm <a href="#">Manage user &gt;</a>

Authorized users [Add authorized user](#)

Name	Role	Username	Status	Security token	Last sign-in	
TED JONES	Authorized user	tedjones123	Suspended			<a href="#">Manage user &gt;</a>
RON WYATT	Authorized user	mlewis45	Active		Jul 19, 2019, 8:34:18 pm	<a href="#">Manage user &gt;</a>

**On the All users page, as the primary admin, click **Manage user** to edit proxy admin rights**

**Note:** Proxy admin(s) cannot add, manage or see other proxy admin info or rights except the info displayed on this table



**CHASE CONNECT** Open an account 3 Sign out

Accounts Pay & transfer Collect & deposit **Account management** Help & support ∨

Access & Security Manager **All users** Account activity Chase Dual Control<sup>SM</sup> IP Security

### Manage account access

**CLAYTON EDWARDS**  
Edit user info | ⋮ 3a

Username clayed555	Role ⓘ Authorized user	Status SUSPENDED
Phone number 123-456-7890	Email address clayed555@yalevi...	

**Important!** If you've turned on Chase Dual Control<sup>SM</sup>, please be sure you have at least one other user who can review and approve those transactions.

[Learn more about statements >](#) 3b

### Company access

▼ CRUZEN LLC

Document exchange

Yale Vision Inc. ∨

Open a new account

Let a user open a new account

Cancel Save

You can edit the user information and account access information on the same screen by clicking the ellipsis menu

# Chase Dual Control<sup>SM</sup> – Administration

Primary admins can activate this feature. Primary and proxy admins can review administrative tasks pending approval





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CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management

Access & Security Manager All users Account activity **Chase Dual Control<sup>SM</sup>** IP Security Help & support

Administration  
Transaction

### Chase Dual Control - Administration

When you activate Chase Dual Control - Administration, tasks such as adding or editing an authorized user's info and rights require a second admin's approval. You'll need at least one proxy admin before you can activate it. If you decide to deactivate later, please contact your customer service representative.

[Chase Dual Control - Administration user guide >](#)

**Activate** 2

Click **Chase Dual Control**, review feature benefits and click **Activate** to enable Chase Dual Control - Administration

Once activated adding additional proxy admins will require a one-time approval from an existing proxy admin

Filter by  
For me to approve

[Add/edit authorized user info](#)

[Add/edit authorized user rights \(0\)](#)

**Note:** Chase Dual Control - Transactions remain unchanged and apply to transactions scheduled by all users: Primary Admin, Proxy Admin and Authorized Users



CHASE CONNECT

Accounts Pay & transfer Collect & deposit Account management

Access & Security Manager All users Account activity **Chase Dual Control<sup>SM</sup>** IP Security Help & support

Administration  
Transaction

### Chase Dual Control-Administration

When you activate Chase Dual Control - Administration, tasks such as adding or editing an authorized user's info and rights require a second admin's approval. You'll need at least one proxy admin before you can activate it. If you decide to deactivate later, please contact your customer service representative.

[Chase Dual Control - Administration user guide >](#)

Filter by  
3 For me to approve

For me to approve

- ▶ Add/edit authorized user info (0)
- ▶ Add/edit authorized user rights (0)

Once the service is active, you can view actions that require your approval or those that are assigned to others using the drop-down

**Note:** Viewing admin approves tasks initiated by all other admins. Tasks still pending review can be approved by others

FAQ





## What is Proxy Admin?

A proxy admin is an additional administrator requested by the primary admin via Access & Security Manager. The proxy admin will be able support the primary admin in various day-to-day administrative tasks. The proxy admin will have access to all products and their daily transaction limits mirror the primary admin unless changed by the primary admin.

### On the all users page:

- All users listed on this page will be separated into 2 tables: System Administrators (Primary and Proxy Admins) and Authorized Users
- Role will now be displayed to distinguish between Primary / Proxy Admins and Authorized Users

Note: Use the tooltips for additional information on "Role" and "Last sign in"

Tip: Used to seeing Edit / Assign? Click Manage user for the same information

### User details page:

- The primary admin can request any authorized user to become a proxy admin, and set up to 3 total proxy admins
- The primary admin can also: suspend / activate / remove users (including the proxy admin), and change administrative procedures
- If responsibilities as a proxy admin are revoked, the user will be moved back to an authorized user but would need to be re-entitled to accounts and / or transactions. Note, the client would need to contact their CSA to revoke proxy admin access



### **What is required to set up a Proxy?**

- Correctly completed and processed SADLF
- Fulfillment/ banker approval NOT required for proxy admin setup

### **Proxy will be able to do the following for accounts they are entitled to:**

- Manage all Authorized Users: edit info, suspend, remove etc.
- Assign rights to all authorized users
- Assign / edit rights of all authorized users for products: Wires, CF360, Bill pay, ACH collections, ACH payments, QD, Transfers & payments and CF360
- Approve all transactions
- View and transact for accounts and products except: Fraud Protection Services, Chase CashFlow360<sup>SM</sup>, Chase QuickDeposit<sup>SM</sup> products and administrative procedures

Note: Accounts / products added after proxy is activated will not be added automatically to the proxy admins profile. Rather, the primary admin must entitle new accounts / products.

### **Proxy cannot:**

- Create or manage other proxy admins

Note: Proxy will only be able to view the following tabs on Access & Security Manager: All users and Help & support

## Proxy Set up:

1. To setup a new proxy, the primary can either select an **existing authorized user** or add a **proxy from scratch**
2. If the primary admin selects an **existing authorized user**, the user's name, past activity, profile ID will remain intact. However, all existing rights will be permanently deleted and replaced by the new rights once the request to elevate to proxy admin is submitted
5. If the primary adds a **proxy from scratch**, the process will be similar to adding an authorized user from scratch but will also need to add proxy admin rights
6. Primary admin will be able to both **delegate admin rights** and **assign transact rights** on one page with entity, account & product-level customization
7. With **admin rights**, the proxy admin can assign 'see and/or transact' rights to all authorized users for the accounts and products (i.e., receivables/ payables) selected
8. With **transact rights**, proxy can 'see & transact' for the same selected accounts and products; proxy admin daily transaction limits will be equal to primary admin limits
9. By default the proxy admin will get both admin and transact capabilities for the accounts and products selected
10. Primary will be able to change proxy admin rights at any time
11. The list of products & services that appear under an account will be driven by account type based on existing logic within Access & Security Manager
12. Once a new "add-proxy" request is submitted, the status will be on hold until the SALDF has been completed and processed
13. Upon receipt of the SADLF, Fulfillment team will review the request by corroborating information on the SADLF with the company resolution documents before Approving/ Revoking the request

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