College Houses and Academic Services Instructions

Completing the Application

To access the online application click on the on link [here](#). When the applicant clicks the link, the applicant will be taken directly to the online application upon authentication with Pennkey name and password.

**Note:** Select the link for **Student Program Card**. All others types of applications will be rejected.

*Figure 2: Application Link*

When the application is open, complete the required fields marked with a red asterisk. If there are specific field requirements, additional help text explains how to enter the requested information. There are three steps to the application process as shown in the figure below, followed by the final submission of the application to the workflow.

*Figure 3: Application Process Steps*

- Step 1: General Information
- Step 2: Administrative Information
- Step 3: Cardholder Acknowledgement
- Final Submission
Step 1: General Information

In Step 1: Enter your name, address, contact information, and other details to ensure the security of your account.

- **Full First Name** and **Last Name**: Enter your full, legal first and last names.
- **Date of Birth**: Enter your date of birth in the requested format.
  
  **Note**: To improve compliance with The Office of Foreign Assets Control (OFAC) of the U.S. Department of the Treasury, the **Date of Birth** field is mandatory. It is used to verify access to a commercial card as well as validate your identity when you call J.P. Morgan for customer support or use the online tools.
- **Employee ID**: Enter your Penn Key ID number. (9 digit # from your Penn ID)
- **PaymentNet User ID**: Enter your Pennkey username. Note that the User ID must be six or more characters, please append with other characters if your username does not meet this criteria.
- **Account Security**: The field labels and help text on the application will clarify the information you are expected to provide in the fields below. You cannot enter the same value in both fields.

**Account Security**

- **SSN**: Enter a four digit security identifier of your choosing. Only numeric characters can be entered in this field.
- **Access Code 2**: Enter a four-digit alpha or numeric identifier for security purposes. You will also use this entry as your personal identification number (PIN) for your credit card.

**Name as It Will Appear on Card**

**First Name on Card, Middle Initial, and Last Name on Card** — Enter your first name, middle initial (if applicable), and last name exactly as you want them to appear on your card. The combined number of characters in these fields may not exceed 23 characters due to space limitations on the actual card.
Enter Contact Information

Contact Information

University Email Address

Business Phone Number

XXX-XXX-XXXX

Address Information

Cardholder Address (Card Delivery-Business Office Address) Use the following address only:

3702 Spruce Street
College Houses and Academic Services
Philadelphia, PA 19104

Home Address: Provide your (US if you are a student) home address.

Note: To improve compliance with The Office of Foreign Assets Control (OFAC) of the U.S. Department of the Treasury, the Home Address is mandatory. It is used to verify access to a commercial card as well as validate your identify when you call J.P. Morgan for customer support or use the online tools. When you have provided all the required information in Step 1, click the Next button. You will be asked to verify all the information in Step 1 before you can proceed to Step 2. If necessary, you may return to Step 1 to edit your application and then continue with the application process.
Step 2: Administrative Information

Approval
Use the following Approval Information. You must be accurate in entering this information or we will not get the application and you will need to start over.

Gina Marziani – Approver name
chasspcard@lists.upenn.edu – Approver email

Comments
The applicant can enter comments related to the application. Comments are optional and will be visible to all approvers who review the application and to the Program Administrator. When you have provided all the required information in Step 2, click the Next button. You will be asked to verify all the information in Step 2 before you can proceed to Step 3. If necessary, you may return to Step 2 to edit your application and then continue with the application process.

Note: If any data fields are incomplete or have invalid entries, a red bar with an error message will appear at the top of the screen. Hover your cursor over the red exclamation mark to view the reason for the error, then make the necessary corrections. You must correct all errors before you can successfully submit your application.

Step 3: Cardholder Acknowledgement

In Step 3: Cardholder Acknowledgement, applicant must review and accept the cardholder acknowledgements that appear.
• J.P. Morgan Chase Cardholder Acknowledgement: Applicant will be prompted to review and accept the J.P. Morgan Chase Cardholder Acknowledgement. Applicant must agree to the terms by clicking the box.

Once applicant has completed Step 3, applicant can click the Previous button to return to previous steps of the application and make any necessary edits. When the application has been completed, click the Submit button.

Final Submission

After completing Step 3, a screen confirming the successful submission of the application will appear and the applicant can then exit out of the online application.

An email notification is sent confirming your submission.
As the application moves through the approval workflow process, the applicant will receive additional emails alerting the applicant of its progress. These emails will have the following subject lines:

- **Application Approved**: your application has been approved and now awaits final signoff by The Card Program Administrator.

- **Card Account Processing**: the Card Program Administrator has completed the final approval step and processing of your card will begin.

- **Application Rejected**: your application has been rejected by the approver for the reason stated in the email. You will need to submit a new application. If you need more information or have questions please contact the CHAS Financial Center, Gina Marziani at marziani@upenn.edu or the Card Program Administrator at purchasingcardsupport@upenn.edu

The cardholder will need to complete the Student Program Card training in KnowledgeLink before he or she is given the card.