Register in J.P. Morgan Portal

The first time you log into J.P. Morgan Portal, you must complete your profile by registering and Accept the Payment

1. Click Register and Accept button on the email received from The Stony Brook Foundation

2. Complete your registration within J.P. Morgan Portal creating a secure password.

3. Click Agree & Complete Registration; then Accept Payment (see below).

Note: If you enter in a mobile number, you may be asked for dual authentication where either an email or text message is sent over with a verification code. Enter the verification code your received into the J.P. Morgan Portal screen.

ACCEPT PAYMENT

After Registration, continue to Accept Payment

Once Registered, to Accept Payment click on Accept Payment then Continue following the steps below.

1. Add your U.S. Bank Account information into the “My Wallet” feature by clicking the carrot (>) Add U.S. Bank Account
   Fill in your bank account information and click Save. Then authorize the payment by clicking Submit.

Whenever a payment is pending you will get an e-mail to accept it. Once you accept payment and log into the concourse page, you will see the outstanding payment. At this point you can go into your wallet and have the payment made into the existing bank account or you can add bank accounts.
2. You will receive a confirmation page as well as an email confirmation that your payment has been completed.

3. Please note, if payment acceptance has not been completed within 7 days, a check will be issued by mail. You will receive an e-mail confirming your check is on the way.

For your convenience, you can input multiple bank accounts into your wallet.

### Dashboard Elements

<table>
<thead>
<tr>
<th>Screen Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td>Gives you visibility into your outstanding payment intents, your auto pay setup, and payment history</td>
</tr>
<tr>
<td>History</td>
<td>Provides all historical transactions and payment status made through the J.P. Morgan Portal</td>
</tr>
<tr>
<td>Wallets</td>
<td>Manage your bank accounts stored within your wallet</td>
</tr>
<tr>
<td>Wallets → Auto Pay</td>
<td>Under the Wallets tab, you will see another tab called Auto Pay. Easily manage / modify your auto pay set up through this link. You can select auto pay for any or all of the bank accounts you have stored. Once enrolled in auto-pay, you never need to “accept” a payment through email – payment will automatically be sent to your bank account.</td>
</tr>
</tbody>
</table>

Please use this link for the SBF Concourse Log-In Page