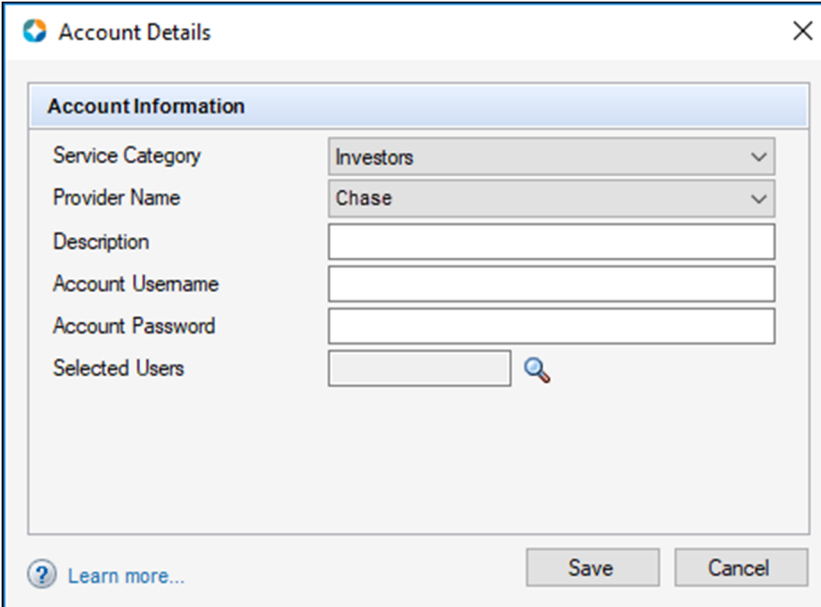


Chase Addendum to the Encompass Investor Connect Lender User's Guide

Complete the following steps to successfully deliver loan packages to Chase through Encompass Investor Connect.

Login Credentials

Chase does not require an Account Name or Password in order to deliver a loan via Encompass Investor Connect, however, Encompass offers this additional layer of security. As a placeholder, please enter Chase in both the Account Username and the Account Password fields in the Encompass Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**) as seen below.



The screenshot shows a dialog box titled "Account Details" with a close button (X) in the top right corner. The dialog contains a section titled "Account Information" with the following fields:

- Service Category: A dropdown menu with "Investors" selected.
- Provider Name: A dropdown menu with "Chase" selected.
- Description: An empty text input field.
- Account Username: An empty text input field.
- Account Password: An empty text input field.
- Selected Users: A text input field with a magnifying glass icon to its right.

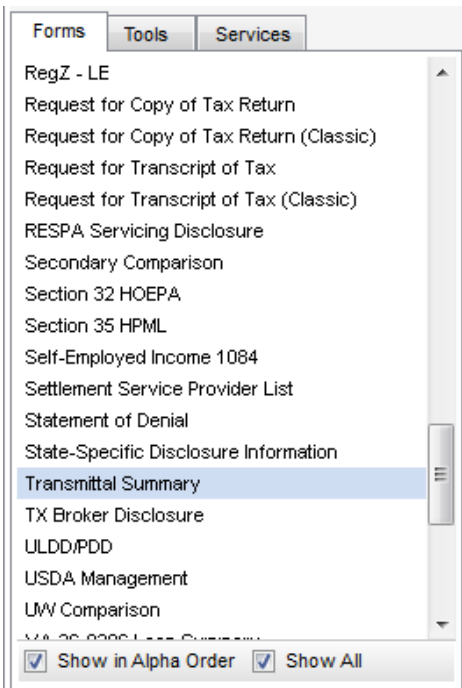
At the bottom of the dialog, there is a "Learn more..." link with a question mark icon, and two buttons: "Save" and "Cancel".

Investor Loan Number


To successfully deliver loan packages, Chase requires a valid Chase Loan Number to be input in the Investor Loan Number field in each loan file submitted through Encompass Investor Connect.

To Add the Investor Loan Number:

1. Open the loan file, click the **Forms** tab in the lower-left panel, and then select the **Show All** check box.



2. Select Transmittal Summary
3. Enter the Chase Loan Number in the **Inv. Loan #** field, and then save the loan.

Phone	<input type="text"/>	
Seller ID #	<input type="text"/>	
Loan #	TEST1316071902	
Inv. Loan #	1316071902	
Commit. #	<input type="text"/>	
Contract #	<input type="text"/>	

Correspondent Delivery Responsibilities

NOTE: Messaging within Encompass may not accurately reflect the status of the loan package with Chase.

Correspondents should proactively confirm successful document receipt using **ChaseLoanManager Image Delivery**. Chase strongly recommends you check the status 24 to 48 hours after the upload, as failures due to issues with the upload may result in a repricing of the loan for late submission.

Use one of the screens below to confirm a successful imaged document receipt. Review this information carefully to determine if any of your document(s) do not reach a **Successful** status by the delivery deadline.

Receiving a Transmission ID after each upload is important to tracking the status of your file. If there is a concern with a file receipt, notify the appropriate contact in your company to address any pricing issues prior to lock expiration. If the file cannot be delivered within allotted timeframe, use ChaseLoanManager to extend your lock prior to the expiration.

IMPORTANT: The website will display an **Upload Successful** confirmation upon package submission, which serves as confirmation that the document(s) were sent and not as confirmation that the documents were successfully received by Chase.

Screen	Best Used For...	Successful Confirmation may be obtained by...
Transmission Explorer	Confirming all documents delivered that have received a Transmission ID. Note: Remove pre-set Uploaded Timeframe dates to view all transmissions.	<ul style="list-style-type: none"> View Status column The transmission Status must equal Successful
Loan Document Status	Searching for a specific loan or borrower to identify documents delivered.	<ul style="list-style-type: none"> Click + sign next to Chase Loan Number to view Status column, The package Status must equal Successful
Custom Reports	Setting search parameters to view all receipt statuses. Export information to Excel or PDF and save for your records.	<ul style="list-style-type: none"> Click + sign next to Chase Loan Number to view Transmission Status column, The Transmission Status must equal Successful <p>Note: Export to Excel or PDF to view all expanded statuses.</p>

Additional Considerations:

- Loan package submissions to Chase are for full file delivery (credit and closing documents), not applicable to credit only or a 1st Gen Appraisal, .pdf appraisal or conditions.
- Contact correspondent.customer.support@chase.com if the Loan Delivery Status remains **Submitted** and does not convert to **Delivered**.
- Proceed through normal channels for follow-up conditions. Contact your Chase Operations Relationship Manager with any questions.