

Introduction ChaseLoanManager offers two ways to **Batch Register** multiple loans at a time. **Batch Upload** permits the loading of an Excel® spreadsheet. **Batch Input** permits quick data entry of multiple loans on one screen.

Complete the steps outlined below to **Batch Register** multiple loans using **Batch Upload**.

Batch Upload

Step	Action
1	Select the Create Loans tab or button from the ChaseLoanManager home page.
2	Select Batch Register , then Batch Upload from the Quick Links menu on the left. If you do not see the link, contact your ChaseLoanManager Administrator to receive access.
3	To set up a Batch Register Data File select the View Instructions and Data Dictionary link to open the Chase Batch Registration Data Dictionary. Note: The Data Dictionary provides you with a sample data file and detailed instructions on how to create your own data file to Batch Register loans in ChaseLoanManager.
4	Select the Browse button to upload the Batch Register data file from your workstation.
5	Select the file and click Open .
6	Select the Upload button to upload the file. All loans are registered upon upload, and the new Chase Loan Number displays in the results grid. The screen indicates the loans that are ready to be locked, or if additional edits are required to lock.

Lock Loans

Step	Action
1	If you wish to continue with locking the loans, either place a checkmark next to the loans that are eligible for lock in the Lock column or, check the Lock All box at the top of the grid.
2	Select the Lock Loan(s) button.

Unable to Lock

Step	Action
1	Select Details to view the unable to lock reason(s).
2	Click the Register/Lock link to access the Register/Lock screen.
3	Make the necessary changes and lock the loan.
4	Select the Batch Register link from the Quick Links menu on the left to return to the Batch Registration screen if additional loans in the Batch need to be locked or corrected.



If after validating all information, a loan **cannot** be locked, complete a **Loan Registration Fax Form** and fax to 1-877-256-0485. Spreadsheets sent via email are **not** accepted.

Print

Step	Action
1	Select the Print Format from the drop-down menu.
2	Select the Print button to view and print the Batch Registration Results.

Helpful Hints

Spreadsheet Formatting

- For maximum system performance, the recommended **maximum** number of loans per **Batch Upload** is 35 loans at a time.
- The system **only** accepts files in ".xls" format.
- Do **not** include dashes in the "BorrowerSSN" column (Example: 123456789).
- If any number in the "CommitmentNumber", "BorrowerSSN", or "PropertyZIP" columns begins with a zero, format the cell as "text". This prevents Excel from removing the zero and causing an upload error.
- If you are unsure of which product to select before upload, leave the "SelectedProduct" column blank. After upload, scroll the Batch Registration results to the right, and select an available product from the **Selected/Available Products** column drop-down.

Duplicate Loans

- There is no duplicate loan check in Batch Register.
- To prevent a duplicate registration, do **not** upload the same loan twice. Each time a loan is loaded, it creates a new loan registration, whether it is locked or not locked. If there are issues with an upload which need to be resolved prior to locking the loan, select the **Register/Lock** link next to each loan and make the corrections on the **Register/Lock** screen.
- If a loan is inadvertently loaded twice, contact your ChaseLoanManager Administrator to request "Cancel Loan" access. Loans may be canceled one at a time in the **Register/Lock** screen.
- Duplicate loans may lead to documents being misrouted and an increased suspense rate.
- If you receive an error message during the upload, log out of the system and log back in to re-display the loans with the upload status. If the loans do **not** re-display, check the **Pipeline** report to confirm **all** loans which are registered. Do **not** re-load the data file **unless** the loans are **not** displayed on the **Batch Upload** results screen, or in the **Pipeline** report.

Helpful Hints – Continued

Mandatory, AOT/Direct Trade Loans

- **Mandatory:**
 - ❖ Allow two hours after taking a Standard Mandatory Commitment with Chase for the **Mandatory Commitment Letter** to be available on ChaseLoanManager in the **Reports** section.
 - ❖ Wait until the **Mandatory Commitment Letter** is available on ChaseLoanManager prior to registering/locking loans to the Commitment.
- **Direct Trade:**
 - ❖ After taking a Direct Trade Commitment with Chase, a Direct Trade Commitment Confirmation is faxed to you.
 - ❖ Allow two hours after receiving the Direct Trade Commitment Confirmation via fax prior to registering/locking loans to the Commitment.
- **AOT:**
 - ❖ Upfront receipt of the AOT Tri-Party Agreement and Dealer Confirmation is required to fax an AOT Commitment Confirmation.
 - ❖ Allow two hours after receiving the AOT Commitment Confirmation via fax prior to registering/locking loans to the Commitment.
- **AOT/Direct Trade:**
 - ❖ Always default the "LockPeriod" column to reflect "15 Day".
- **Mandatory, AOT and/or Direct Trade:**
 - ❖ Locked loans are priced according to the upcoming delivery date, and the loan may be re-priced based on the actual document delivery date.
 - ❖ Loans may be re-allocated to a different Commitment Number of the same Commitment Type (Mandatory to Mandatory or AOT/Direct Trade to AOT/Direct Trade) on registered and locked loans, up until the time documents are received at Chase.
 - ❖ After the documents are received by Chase, re-allocations require a **Loan Registration Fax Form** request from the Correspondent.

Loan Delivery

- To prevent intake issues and penalties, all loans should be locked in ChaseLoanManager **prior** to imaged or hard-copy document delivery to Chase.
- Include a completed **Chase Funding Request Form and Loan Submission Checklist** with the documents. When the loan is locked **prior** to delivery **only** provide the Chase Loan Number on the form. Do **not** include the Commitment Number.

Support

For assistance with ChaseLoanManager, contact the Chase Technical Support Team at 1-877-ASK-CHASE (275-2427), Option 4.