

Introduction

In the financial services industry, we all have a responsibility to protect borrower personal information. As a ChaseLoanManager Security Administrator for your company, Chase requires you to re-certify all user-level access on an annual basis. To comply with privacy laws, this annual recertification ensures that the individuals you have authorized to access ChaseLoanManager are still in your employ in roles appropriate to use the system and view customer information.



The recertification for your company must be completed as soon as you receive email notification from Chase. If the annual recertification of all users is **not** completed by the deadline, Chase will suspend your ability to lock new loans.

User Recertification Process

To complete the ChaseLoanManager User Management Recertification Process, please do the following:

Step	Action
1	Print the ChaseLoanManager Recertification Form provided to you via email from Chase Correspondent Lending to access your current list of ChaseLoanManager Users.
2	Verify your current list of ChaseLoanManager Users against your company's current employment records.
3	For each user on the ChaseLoanManager Recertification Form , check whether you will retain or delete the user in ChaseLoanManager.
4	If you have users to delete, access ChaseLoanManager and delete these users. The Delete User steps are provided below. You may also access the ChaseLoanManager User Management Guide, Updating/Deleting Existing Users section, which contains the steps with screen prints for additional reference as needed.
5	Once you have deleted your users, sign the acknowledgement at the bottom of the ChaseLoanManager Recertification Form and fax all pages of the form to 866-282-3095.



If you continue to receive recertification email notices, your form was **not** completed in full and Chase will contact you to provide the necessary information.

Delete User

If a user is no longer with the company, or no longer requires access to ChaseLoanManager, delete the user following the steps below:

Step	Action
1	Click the User Management link in the upper right corner of the ChaseLoanManager home page (only viewable/accessible to administrators).
2	Select the desired user name from the ChaseLoanManager User List and click the Delete User button at the bottom of the screen.
3	A message box appears to confirm you want to delete the user. If you confirm deletion, this user no longer has access to ChaseLoanManager and is removed from your list of users.



If your company has two designated security administrators for ChaseLoanManager, this recertification must only be completed by one administrator.

Best Practices

Administrator Coverage:

Two security administrators are necessary to ensure your company maintains constant, controlled coverage of user access granted at the correspondent level.

Ongoing Maintenance:

Complete ongoing maintenance on all users to ensure they have the proper access needed and increase overall efficiencies within your company.

Verify, modify or delete each user in the **ChaseLoanManager User List** displayed on the **User Management** screen. Select each user name from the **ChaseLoanManager User List** and consider the following ongoing maintenance verification questions:

Ongoing Maintenance Verification Questions	If yes, then:
Does the user still require access to ChaseLoanManager?	The user access is current. No further action is required in ChaseLoanManager. Continue to the next question.
Does the user need any updates to their current access levels, for example has their role changed?	Update the information on the existing user. Select the desired user name from the ChaseLoanManager User List . Revise the information as needed and click Save Changes button at the bottom of the screen. A verification email is sent to the administrator and the user to indicate the user information has been changed.
Is the user no longer with your company, or do they no longer require access to ChaseLoanManager?	Delete the user. Select the desired user name from the ChaseLoanManager User List and click the Delete User button at the bottom of the screen. A message box appears to confirm you want to delete the user. If you confirm deletion, this user no longer has access to ChaseLoanManager and is removed from your list of users.

Support

For questions about the annual ChaseLoanManager Recertification Process, contact your Account Executive or call the Technical Support Desk at 1-877-ASK-CHASE (275-2427), Option 4.