

# Imaged Document Delivery

## Tips for Ensuring a Successful Imaged File Delivery

**Introduction** When sending an Imaged file to Chase Correspondent, it is important for you to know the file is successfully received.

Listed below are tips you can use to help ensure a seamless and efficient file delivery. Depending on your file format and electronic delivery method, review the following considerations during the file delivery process and ask yourself these key questions below.

### File receipt should always be officially confirmed.

Did I receive an email from [imaged.delivery@chase.com](mailto:imaged.delivery@chase.com)\* the day **after** I loaded the file, and are **all** of my files listed?

- If my file was **not** confirmed the **next day**, did I **immediately** notify [imaged.delivery@chase.com](mailto:imaged.delivery@chase.com)\*?
- Is the page count **correct**? If not, Chase may **not** have received **all** documents.
- Does the last name column **match** the file name? If **not**, the documents in the file may have been for a **different borrower**. Contact [imaged.delivery@chase.com](mailto:imaged.delivery@chase.com)\* to determine if the file needs to be resent.

Be aware of these unofficial confirmations:

- The automated confirmation email you receive immediately after Web site file upload from [transmission.control@jpmchase.com](mailto:transmission.control@jpmchase.com) is **not** the official confirmation Chase Correspondent has successfully received the file.
- This email is useful in alerting you that your file was successfully transmitted to the Web site. Your file **must** still be successfully uploaded into the image intake system, opened, processed and confirmed by Imaged Delivery to be considered successful.
- Verbal confirmations from the Chase Transmission Control Team do not ensure that Imaged Delivery has successfully received your file.
- If you use a third-party vendor to assist with delivering files, the confirmation they provide is **not** the official confirmation Chase has successfully received the file.



### The Funding Request Form and Credit File Submission Checklist should always be included and correct.

- Is the Form on the **first page** of the imaged file?
- Does the Form match the documents for the **same loan**?
- Have I **completed** the Form in its **entirety**?
- Have I **included** the Chase Loan Number on the Form? If a Mandatory/AOT/Direct Trade, have I included the Mandatory Commitment Number and my company's Loan Number?



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### Check that the file isn't corrupt, invalid or partial.

- Did I follow the Chase file-naming format, including a **correct** Customer Code and **no** special characters in the Borrower's last name?
- Is the file type a **valid** PDF, TIFF, or ZIP file?
- Are the documents within the ZIP file **valid** XML, PDFs and/or TIFFs?
- Did you know attaching documents saved as "Shortcuts" causes a **corrupted** file?
- Are security features present in your file which would **prevent** Chase from processing the documents (appraisal, 4506-T, income docs)?

If you are using the upload Web site:



- The toggle button on the screen should say **Set ASCII**, and **not** say **Set Binary**.
- Do **not** hit the **Refresh** button on your Internet browser while uploading; this **interrupts** your transmission and **causes** file delivery failures.
- The **Corr\_Inbound** folder near the top of the screen should **always** be selected to transmit the file successfully.
- If a file remains in either the **Corr\_Inbound** or **Corr\_Outbound** folder, the file was **not** successfully uploaded. Contact the Transmission Control Help Desk at (800) 990-9217 for further assistance.

### Underwriting & Credit Packages

If you are delivering a **credit-only** package for Chase Underwriting review, include "**\_credit**" at the end of the filename, before the .pdf, .tif, or .zip extension. This will ensure proper routing of the credit file and reduce delays. Reference the **Imaging Indexed or Non-Indexed Online Guides** for more information on the file naming requirement.

**Please Note:** Do **not** follow this guideline if you are sending both the **credit and closed** file for Funding Review.

### Conditions

Do **not** submit loan conditions via imaged document delivery. Continue to fax or e-mail all Underwriting and Funding conditions by following the current processes detailed in the Online Guides.

### Not Set Up?

If you are **not** currently set up to send imaged documents to Chase, please contact your Account Executive or [imaged.delivery@chase.com](mailto:imaged.delivery@chase.com).

### Resources & Tools

If you would like more information, visit our Online Guides, Imaged Delivery Guides folder, at [chaseb2b.com](http://chaseb2b.com).



Contact [imaged.delivery@chase.com](mailto:imaged.delivery@chase.com)\* and **not** the Chase Team Member you worked with during the Imaging set-up and testing process regarding production file issues.

The Imaged Delivery inbox is your best resource for information regarding file inquiries.

\* When contacting [imaged.delivery@chase.com](mailto:imaged.delivery@chase.com) with a file inquiry, please include your Customer Code, the date of file delivery and the borrower's last name in your emailed request. This helps our analysts address your concerns more efficiently.

