

IMAGED DOCUMENT DELIVERY SET UP

Determine Delivery Format

Correspondents who meet the following criteria are eligible for Imaged Document Delivery:

- Ability to create a PDF or TIFF of all loan documents
- Ability to name the file in a standard naming convention
- Ability to deliver files electronically via a secure Web site (HTTPS) or FTP (using PGP, GNUPG, or SSL or SSH2 encryption)

We will work with you to choose the file transfer delivery method and file format best suited to your business operations.

Indexed vs. Non-Indexed Delivery

Indexed to Chase standards means...

- Individual PDF or TIFF for each document
- XML document with loan referencing data and document code mapping
- ZIP file that includes XML and all PDFs or TIFFs
- ZIP file is named using a standard naming convention

Non-Indexed means...

- No dictated structure for the file (aka blob), except the images must be in PDF or TIFF format
- Multiple PDFs and TIFFs per loan should be zipped
- File is named using a standard naming convention
- Delivery of XML is helpful but not required



A complete **Funding Request Form** must be included with each file. For non-indexed files, it should preferably be the first page.

For additional information about Imaged Document Delivery set up, contact your Account Executive.

Image Document Delivery Set Up

There are three phases in Correspondent Imaged Document Delivery set up:

Initial Set Up Phase

Your Account Executive will schedule a brief **Testing Call** with Chase and your Business and Technology contacts to:

- Determine your file format and electronic delivery method
- Explain the set-up and delivery process

If ready to proceed with set up, you will receive an email from Chase Connectivity Services within one business day that includes your User ID, Password and the location to send files.



Correspondents who use a third party vendor should contact them to obtain the applicable upgrade to deliver imaged documents to Chase (usually takes 2-3 weeks).

Testing Phase

When you are ready to begin delivering test imaged documents to Chase electronically, send any three previously funded loan files. Contact Chase Connectivity Services when the files are sent.

Upon a detailed review of the test files, results will be communicated to you. If additional testing is necessary, we will continue to test until *three transmissions are successfully received*.

Once testing is complete, you will receive an approval email. A brief **Orientation Call** may be scheduled to discuss the imaged file delivery procedures.

Orientation Phase

Once you are approved for **Imaged Delivery Orientation** authority, connectivity will be established within 24-48 hours and you may begin delivering live imaged files to Chase.

The Orientation Phase will continue until *three transmissions are successfully received*. At that time, you will be approved for full **Imaged Delivery Funding** authority.