

Insurance Claim Check Branch Website Procedures

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Overview

This document provides:

- The purpose and overall function of the insurance claim check website.
- The roles and responsibilities of the Insurance Claims Customer Care team.
- Website navigation for:
 - The Customer Information screen
 - The Loan Results screen
 - The Customer Claim List or "Tell Us About the Customer's Claim" screens
 - Steps to handle loan exception scenarios
 - Steps to process an endorse and release claim
 - Steps to process a monitored claim
 - How to print important customer instructions for the insurance claim check process
 - How to enter the action you took with the customer

Website Function

The new insurance claim check website will assist team members in determining how to process a Chase insurance claim check for Insurance Claims.

By entering information about the check, the website will provide an approval for endorsement or guidance for handling checks that cannot be endorsed at the branch. When instructed, the claim document information can be printed from the website for your customer. The website will return data 24 hours a day, seven days a week.

The website can be used for the majority of the insurance loss scenarios; however, it has not been designed to handle all exceptions. When you are assisting a customer with a unique scenario, it may be necessary for you to contact Chase Insurance Claims for additional support. The Insurance Claims Representative will be able to provide guidance and instructions on how to process the insurance claim check for the customer in a timely manner.

Chase Insurance Claims

Chase Insurance Claims:

- Provides assistance on first mortgage loans to the Chase sales sites and Chase branches.
- Is available to help with servicing related issues that may impact our ability to provide customers with Best in Class Service.
- Call Chase Insurance Claims using the telephone number below.
 - 1-877-498-5332

The hours of operation are:

- **Monday-Friday:** 8:00 A.M. – 12:00 A.M. Eastern Time
- **Saturday:** 8:00 A.M. – 8:00 P.M. Eastern Time

Accessing the Insurance Claim Check Website

- Log into the InsuranceClaimCheck.com Branch Access Website by using the link below, which can be copied and pasted into your internet browser:

<https://www.insuranceclaimcheck.com/sp/assertionconsumer.aspx>

To save the link above to your Favorites, do the following:

1. Select the link above to access the sign on screen.
2. On the sign-on screen, under the **Bookmarking** heading, select the *click to bookmark* link.
3. Save the link to your Favorites

Note: After you save the link, then enter your AD-ENT ID and password in the corresponding fields on the sign on screen.

Customer Information Search screen

After logging into the website, the Customer Information Search page is the first screen that will display. Bankers must follow standard branch procedures for identifying customers. Perform the steps below to perform a search for the customer's loan.

1. Enter *one* of the combinations below using the customer's:
 - Loan number and property zip code
 - First name, last name, and last four digits of their social security number
 - Property street number and name, city, state and zip code

Note: When entering the loan number, exclude the 3-digit client numbers 156 and 465. If you experience difficulty using the loan number, try another search option. The combination being used will display in white once selected.

The screenshot shows the 'Branch Access' page with a green header. Below the header is a search bar with the text 'Search by loan number, last name/SSN, or by property address'. There are three search sections, each with a 'Submit' button:

- Loan and Zip Search:** Contains two input fields labeled 'Loan Number:' and 'Property Zip Code:', both marked 'Required'.
- Name Search:** Contains three input fields labeled 'First Name:', 'Last Name:', and 'Last 4 of SSN:', all marked 'Required'.
- Address Search:** Contains four input fields labeled 'Property Street Address:', 'Property City:', 'Property State:', and 'Property Zip Code:', all marked 'Required'. The 'Property State:' field is a dropdown menu.

2. Did the results of the search display?

- **No:** A message will display indicating the results could not be retrieved and the area to contact for help.
- **Yes:** The Loan Search Results screen will display and it will list the borrowers, loan number, and property addresses.

Loan Results screen

If the Loan Search Results screen:

- Displays the correct customer, and then select the loan number for the correct corresponding borrower and property address.
- Did *not* display the correct customer, and then select Search Again to return to the Customer Information search screen.

Client	Loan Number	Borrower	Co-Borrower	Property Street	City	State	Zip

Search Again

After the loan is selected, one of the following screens will display.

Screen	Details
Tell Us About the Customer's Claim	<ul style="list-style-type: none">• Displays when there are not any existing claims on the selected loan.• Prompts the Banker to enter the claim details to create the claim in the system.
Claim List	<ul style="list-style-type: none">• Displays when the loan already has an existing claim.• Prompts the Banker to enter the insurance claim check amount.

Tell Us About the Customer's Claim screen

- The Tell Us About the Customer's Claim screen will display when the customer does *not* have any existing claims on their loan.
- The purpose of this screen is to obtain the customer's claim details to ensure the system is able to determine how to assist the customer.
- Obtain the required information from the customer to create the customer's claim. All fields on the screen must be completed before moving to the next screen.
- After submitting the claim information, you may be asked to confirm the customer's contact information. The required fields will be indicated on the claim screen.
- If the decision returned is anything other than Endorse and Release, it is important to ensure the claim contains the customer's correct contact information, including their telephone number and mailing address. Verifying the information ensures the claim documentation or disbursement checks are sent to the correct customer.
- Provided below is a screen example and a description for each field on the screen.

The screenshot shows the 'Tell Us About the Customer's Claim' screen on the InsuranceClaimCheck.com website. The page has a header with the company logo and navigation links. The main content area contains a form with several fields and a 'Send' button. Numbered callouts (1-7) are placed over specific elements: 1 points to the 'Insurance Claim Check Amount' input field; 2 points to the 'Cause of Property Damage' dropdown menu; 3 points to the 'Date damage occurred' input field; 4 points to the radio button options for 'Customer brought in Check today' or 'Customer DID NOT bring in Check today'; 5 points to the 'Select box if this is an Emergency Check' checkbox; 6 points to the 'Website Procedures' link in the header; and 7 points to the 'Send' button at the bottom right.

InsuranceClaimCheck.com
obtaining your claim funds just got easier

InsuranceClaimCheck.com

6 Website Procedures Tell Us About Your Claim | FAQ | Contact Us

Tell Us About the Customer's Claim

Please enter the Customer's claim information below to begin the process. Once completed, select the "Send" button.

Insurance Claim Check Amount:
(If you have multiple checks, add amounts together)

1

Cause of Property Damage Date damage occurred








2 Required 3

4 ☐ Customer brought in Check today ☐ Customer DID NOT bring in Check today

At times insurance companies will issue 'Emergency Checks' which is typically identified on the check voucher or accompanied by a cover letter stating that it is an emergency check. An Adjuster's Worksheet/Report is not always issued by the Insurance Company for these types of checks.

5 ☐ Select box if this is an Emergency Check

Cancel 7 Send

Number	Field name	Description
	Insurance Claim Check Amount	Total amount of check being discussed or brought in by the customer for their claim.
	Cause of Property Damage	Cause of the damage to the customer's property, which can be found on the check, check stub, or adjuster's worksheet.
	Date damaged occurred	Date the damage to the property occurred, which can be found on the check, check stub, or adjuster's worksheet.
	Customer brought in Check today Customer DID NOT bring in Check today	<p>Customer brought in Check today: Select when the customer is in the branch with their claim check.</p> <p>Customer DID NOT bring in Check today: Select when the customer does not have the check and is requesting information only.</p>
	Select box if this is an Emergency Check	<p>Select when the check has been identified by the Banker as being an emergency check.</p> <p><i>Note:</i> At times insurance companies will issue emergency checks. These are typically identified on the check voucher or accompanied by a cover letter stating that it is an emergency check. An adjuster's worksheet or report is not always issued by the insurance company for these types of checks.</p>
	Navigational Links	<p>Links can be selected at any time during the customer session.</p> <ul style="list-style-type: none"> • Website Procedures: Displays a PDF of these procedures for access at any time. • Tell Us About Your Claim: Redirects you to the Tell Us About the Customer's Claim screen seen below. • FAQ: Displays questions that are frequently received from customers. These can be used to assist the customer with questions they may have regarding the claim process. • Contact Us: Displays the Chase Insurance Claims contact information and business hours that can be provided to the customer if needed.
	Submit	Select Send after all the required information has been entered. This will create the claim in the system and instructions will display on the screen so that you can properly assist the customer with their insurance claim.

Claim List Screen

The claim list screen (example shown below) will display when a customer already has an existing claim on the selected loan. Once the information is provided by the customer or confirmed on the check, check stub, or documentation provided by the customer, perform the following steps.

1. Confirm with the customer the information in the Property Damage and Date of Loss fields is correct for the claim the customer is discussing.
2. Was a matching claim found?
 - **No:** Select the Add Another Claim link to return to the Tell Us About the Customer's Claim screen to report a new claim.
 - **Yes:** Select the existing tracking number from the claim list. The Report Check Amount screen will display.

Claim List

View an existing claim OR add another claim.

[Add Another Claim](#)

Tracking Number	Property Damage	Date Of Loss	Status
<input type="text"/>	FIRE	11-01-2017	PENDED

Report Check Amount screen

The Report Check Amount screen (example shown below) requires the Banker to indicate if the customer has the check with them at the branch *or* if the customer is requesting information about the insurance claim process.

1. Select *one* of the options to indicate if the customer has the check at the branch or not.
 - **Customer brought in Check today:** Select this option when the customer is at the branch and has their insurance claim check in hand.
 - **Customer DID NOT bring in Check today:** Select this option when the customer does not have the check and is only requesting information.

2. Enter the total check amount being reported by the customer in the Enter total check amount(s) field.

Note: If the customer has multiple checks to be processed, add the check totals together and enter that amount in the field.

3. Determine if the check is an emergency check.

Note: At times insurance companies will issue emergency checks. These are typically identified on the check voucher or accompanied by a cover letter stating that it is an emergency check. An adjuster's worksheet or report is not always issued by the insurance company for these types of checks.

- **Yes:** Select the box to indicate the check is an emergency check. Select **Submit** to receive the appropriate instructions on how to assist the customer.
- **No:** Select **Submit** and the system will provide a decision based on the information that has been entered for the claim.

The screenshot shows a web form titled "Report Check Amount". Below the title is a instruction: "Please select one of the options below and provide the Amount of the Check(s) being reported by the Customer today." There are two radio button options: "Customer brought in Check today" and "Customer DID NOT bring in Check today". A red note states: "NOTE: If below amount is not provided, To Do steps may be subject to change once amount is provided." Below this is a text input field labeled "Enter total check amount(s):". A box contains additional information: "At times insurance companies will issue 'Emergency Checks' which is typically identified on the check voucher or accompanied by a cover letter stating that it is an emergency check. An Adjuster's Worksheet/Report is not always issued by the Insurance Company for these types of checks." followed by a checkbox labeled "Select box if this is an Emergency Check". A blue "Submit" button is at the bottom right.

To Do List screen

The To Do List screen:

- Provides the required steps a Banker must complete when assisting the customer with their insurance claim check. The steps are based on the specific customer loan, type of loss and claim amount.
- Will specify how the claim will be handled.

After all the claim information is entered, the site will provide one of the following basic decisions:

- [Decision Result #1:](#) This loan has been transferred to another mortgage company.
- [Decision Result #2:](#) This loan is paid in full.
- [Decision Result #3:](#) This Insurance Claim Check must be sent to Insurance Claims for Processing.
- [Decision Result #4 and #5:](#) This Insurance Claim Check CAN be Endorsed today at the Branch.
Note: Some 'endorse and release' claims may at times require an inspection after all the insurance repairs have been completed. This is typically a requirement on high dollar claim amounts or an investor requirement. The Banker will be prompted within the To Do List to provide the customer with an Inspection Disclosure form when this is a requirement.
- [Decision Result #6:](#) This Insurance Claim Check CAN ONLY be Deposited at the Branch.

Decision Result #1 – This loan has been transferred to another mortgage company

The To Do List screen displays (example shown below) advising that the loan has been transferred to another mortgage company. Follow the instructions that display on the screen in the Required Branch Steps section.

The insurance claim check cannot be endorsed by Chase since the bank is no longer the lien holder. As a result, the customer's insurance company must reissue the check made payable to the customer and the new mortgage company, now considered the lien holder.

The screenshot shows a web interface with a blue header bar labeled "To Do List". Below this is a white box with a blue border containing the text: "This loan has been Transferred to Another Mortgage Company" and "Please follow the steps below to assist the customer with their Insurance Claim Check." Below this is another white box with a blue border, titled "Required Branch Steps" in a blue header. Inside this box, there is a red link "See Documents for this Claim" and a list of three steps: 1. Advise customer that Chase is not authorized to endorse this Insurance Claim Check. 2. Click here to provide the customer with their Next Steps. 3. Click here to assist the customer if they do NOT know who the new Mortgage Company is. At the bottom of this box is a blue button labeled "Complete Transaction".

Provided below is an explanation of each link in the Required Branch Steps section of the To Do List screen.

Link	Details
See Documents for this claim	This link can be selected to find out the status of documents the customer may have sent to Chase Insurance Claims or to know which documents the customer must provide.
Click here to provide the customer with their Next Steps	When the link is selected, a pop up box appears and it displays information to provide to the customer. After providing the information to the customer, select OK to return to the To Do List screen.
Click here to assist the customer if they do NOT know who the new Mortgage Company is	When the link is selected, a pop up box appears and it displays instructions on how to assist the customer. After completing the instructions, select OK to return to the To Do List screen.
Click here to Complete the Transaction	When the link is selected, a pop up box appears and the appropriate option must be selected from the Action Taken drop-down menu. The options in the drop-down menu are specific to the decision returned by the system and indicates the available options for the Banker to provide to the customer.

Decision Result #2 – This Loan is Paid in Full

The To Do List screen displays (example shown below) advising the Banker to provide the customer with their next steps.

The insurance claim check cannot be endorsed by Chase since the loan is paid in full and the bank is no longer the lien holder. As a result, the customer's insurance company needs to reissue the check made payable to the customer.

The screenshot shows a web interface for a 'To Do List'. At the top, there is a blue header with the text 'To Do List'. Below this, a large white box contains the title 'This Loan is Paid in Full' in blue, followed by the instruction 'Please follow the steps below to assist the customer with their Insurance Claim Check.' in grey. Underneath, a blue bar labeled 'Required Branch Steps' contains a red link 'See Documents for this Claim'. Below the bar, a list item '1. Click here to provide the customer with their Next Steps.' is shown. At the bottom of the list, there is a blue button labeled 'Complete Transaction'.

Provided below is an explanation of each link in the Required Branch Steps section of the To Do List screen.

Link	Details
See Documents for this claim	This link can be selected to find out the status of documents the customer may have sent to Chase Insurance Claims or to know which documents the customer must provide.
Click here to provide the customer with their Next Steps	When the link is selected, a pop up box appears and it displays information to provide to the customer. After providing the information to the customer, select OK to return to the To Do List screen.
Click here to Complete the Transaction	When the link is selected, a pop up box appears and the appropriate option must be selected from the Action Taken drop-down menu. The options in the drop-down menu are specific to the decision returned by the system and indicates the available options for the Banker to provide to the customer.

Decision Result #3 – This Insurance Claim Check must be sent to Insurance Claims for Processing.

The To Do List screen displays (example shown below), advising the Banker to advise the customer to send the endorsed claim check to Insurance Claims for processing. The mailing instructions are provided to the customer in the claim packet that the Banker will print as indicated in step 3 of the Required Branch Steps.

Notes:

- The mailing address can also be obtained by selecting the Document Deliver Options – Mail link, which appears on the right side of the screen.
- Confirm the customer understands the check must be endorsed by all parties (other than Chase) before the check is sent to Insurance Claims. Missing endorsements will cause delays in processing.

Provided below is an explanation of each link in the Required Branch Steps section of the To Do List screen.

Link	Details
See Documents for this claim	This link can be selected to find out the status of documents the customer may have sent to Insurance Claims or to know which documents the customer must provide.
Click here to provide the customer with their Next Steps	When the link is selected, a pop up box appears and it displays information to provide to the customer. After providing the information to the customer, select OK to return to the To Do List screen.
Click here to Print Claim Packet and provide to customer	When this link is selected, a printable PDF Monitored Claim Packet for a general monitored claim displays. The packet contains helpful information to assist the customer with their claim.
Click here to Complete the Transaction	<p>When the link is selected, a pop up box appears and the appropriate option must be selected from the Action Taken drop-down menu.</p> <p>The options in the drop-down menu are specific to the decision returned by the system and indicates the available options for the Banker to provide to the customer.</p>

Decision Result #4 and #5 – The Insurance Claim Check CAN be Endorsed today at the Branch. (NM and EEnR)

The To Do List screen displays (example shown below), advising the Banker the steps needed to assist the customer with endorsing and releasing their insurance claim check.

To Do List

The Insurance Claim Check CAN be Endorsed today at the Branch.

Please follow the steps below to assist the customer with the Endorsement of their check so that they may repair their damages.

Special Advisement for Customer: The claim process outlined in the steps below are subject to change based on an increase of the Claim Amount.

Required Branch Steps

[See Documents for this Claim](#)

1. [Click here for Endorsement Instructions and Endorse the Check](#)
2. Copy front and back of Fully Endorsed check
3. [Click here to Complete and Print Fax Cover Sheet](#)
4. [Click here to ensure all documentation is ready to be faxed](#)
5. Fax all documentation to Insurance Claims Department at 678-459-9753
6. Offer customer any original/copies of their documentation or advise you can shred for them
7. [Click here to Print Claim Packet and provide to customer](#)
8. [Click here to advise the customer of important information regarding their claim](#)

Continue Transaction

To Do List

The Insurance Claim Check CAN be Endorsed today at the Branch.

Please follow the steps below to assist the customer with the Endorsement of their check so that they may repair their damages.

Special Advisement for Customer: The claim process outlined in the steps below are subject to change based on an increase of the Claim Amount.

Required Branch Steps

[See Documents for this Claim](#)

1. [Click here for Endorsement Instructions and Endorse the Check](#)
2. [Click here to Complete and Print Fax Cover Sheet](#)
3. [Click here to ensure all documentation is ready to be faxed](#)
4. Fax all documentation to Insurance Claims Department at 678-459-9753
5. Offer customer any original/copies of their documentation or advise you can shred for them
6. [Click here to Print Claim Packet and provide to customer](#)
7. [Click here to advise the customer of important information regarding their claim](#)
8. Advise the customer that a final inspection is required when repairs are completed
9. A copy of the Insurance Adjuster's Worksheet is required prior to Inspection Request

Continue Transaction

Link	Details
Click here for Endorsement Instructions and Endorse the Check	When this link is selected, a pop up box appears and displays an example of how to endorse the insurance claim check for the customer. Select OK to return to the To Do List screen.
Click here to Complete and Print Fax Cover Sheet	Note: Only one payee needs to be present at the time of endorsement. When this link is selected, the internal Branch Package Fax Cover Sheet displays. The Banker must complete the Check Amount field. Once that field is completed with the total amount for all the checks the customer has presented, the fax cover sheet can then be printed and used for faxing the documentation to Chase Insurance Claims.
Click here to ensure all documentation is ready to be faxed	When this link is selected, the Chase Insurance Claims Package displays. The Banker can print the packet and provide it to the customer to take home.
Click here to Print Claim Packet and provide to customer	When this link is selected, a pop up screen appears and it displays information to provide to the customer about the potential next steps on their claim.
Click here to advise the customer of important information regarding their claim	When this link is selected, a pop up screen appears and it displays information to provide to the customer about the potential next steps on their claim.

Click here to Complete the Transaction

When this link is selected, a pop up screen appears and the appropriate option must be selected from the Action Taken drop-down menu. This selection is required for each transaction.

The options in the drop-down menu are specific to the decision returned by the system and indicates the available options for the Banker to provide to the customer.

Decision Result #6 – This Insurance Claim Check can only be Deposited at the Branch. (Monitored claim)

The To Do List screen displays (example shown below), advising the Banker the steps needed to assist the customer with depositing their insurance claim check at the branch.

To Do List

This Insurance Claim Check can only be Deposited at the Branch.

Please follow the steps below to assist the customer with the Deposit of their check into a restricted escrow Chase Account for the monitoring of this claim.

Required Branch Steps

[See Documents for this Claim](#)

1. Advise the customer that their claim will be monitored based on the amount of their check.
2. Ensure ALL payees on check have endorsed the back
3. [Click here if the check is NOT fully endorsed by all payees listed.](#)
4. Advise the customer that the Deposit will take 3 business days to process
5. Stamp/Endorse the check for Deposit Only
6. Make Deposit to DDA account number 806003448
7. [Click here to Complete and Print Fax Cover Sheet](#)
8. [Click here to ensure all documentation is ready to be faxed](#)
9. Fax all documentation to Insurance Claims Department at 678-459-9152
10. [Click here to provide the customer with helpful claim information](#)
11. [Click here to Print Claim Packet and provide to customer](#)

Continue Transaction

Branch Information

Please fill out the information below

2/2/2018

Banker SSO ID: gy2993

Banker Name: (from SAML) Bill O'Malley

Classification: MONITORED

Action Taken: **Advised of Information Only**

Advised of Information Only

Advised to Send Check to Insurance Claims

Completed Branch Deposit

Close **Submit**

Link	Details
Click here if the check is NOT fully endorsed by all payees listed	When this link is selected, a pop up box appears and displays instructions on advisement to the customer letting them know the check must be fully endorsed to be processed at the branch.
Click here to Complete and Print Fax Cover Sheet	When this link is selected, the internal Branch Package Fax Cover Sheet displays. The Banker must complete the Check Amount field. Once that field is completed with the total amount for all the checks the customer has presented, the fax cover sheet can then be printed and used for faxing the documentation to Chase Insurance Claims.
Click here to ensure all documentation is ready to be faxed	When this link is selected, the Chase Insurance Claims Package displays. The Banker can print the packet and provide it to the customer to take home.
Click here to provide the customer of important information regarding their claim	When this link is selected, a pop up screen appears and it displays information to provide to the customer about the potential next steps on their claim.

Insurance claim check website procedures

Click here to Print Claim Packet and provide to customer

When this link is selected, a pop up screen appears and it displays information to provide to the customer about the potential next steps on their claim.

Click here to Complete the Transaction

When this link is selected, a pop up screen appears and the appropriate option must be selected from the Action Taken drop-down menu. This selection is required for each transaction.

The options in the drop-down menu are specific to the decision returned by the system and indicates the available options for the Banker to provide to the customer.

Check Information screen

- The Check Information screen displays (example below) after the Branch Information pop up screen and appears **only** if the Banker has selected the 'Endorsed and Released' or 'Completed Branch Deposit' option from the Action Taken drop-down menu.
- Informational hover options are available on the screen and they describe the information being requested.
- The Banker is responsible for entering accurate information from the insurance claim check in the correct fields on the screen.
- If more information is needed on how to complete the check information screen, click the Sample Check Image link that appears in the upper right section of the screen.
- All the payee's names that are listed on the check must be provided on the screen. You can select the Additional Payee link to enter additional names.
- All checks must be signed by an authorized endorser and that Banker's name must be provided on the screen.

The screenshot shows the 'Check Information' form with the following fields and options:

- Check Information** (Title)
- [Sample Check Image](#) (Link)
- Please fill out the information below
- Issuer: [Text Field] Amount: [Text Field]
- Check #: [Text Field] Check Date: [Text Field] Required [Calendar Icon]
- Cause of property damage: [Text Field] Date damage occurred: [Text Field]
- HAIL 04-08-2017
- Void After: [Dropdown Menu]
- Payee Last Name: [Text Field] First Name: [Text Field]
- + [Additional Payee?](#)
- Financial Institution Name on Check: [Text Field]
- Buttons: Cancel, Add another check, Submit

Sample Check Image

The image shows two sample checks with numbered annotations (1-13) indicating required fields:

Check 1 (Top):

- 1. INSURANCE COMPANY NAME
- 2. Amount
- 3. CHECK NO. 13 282701 J
- 4. DATE 05-04-2016
- 5. VOID IF NOT CASHED WITHIN 90 DAYS
- 6. HUNDRED SIXTY-NINE THOUSAND NINE HUNDRED NINETY AND 20/100 DOLLARS
- 7. Pay to the Order of: JOHN SMITH & SOPHIE SMITH & JPMORGAN CHASE BANK NA ITS SUCCESSORS AND OR ASSIGNS
- 8. JPMORGAN CHASE BANK NA 561-2544442 COLUMBUS, OH 43240
- 9. CLAIM NO 55-7862-256 LOSS DATE 01-21-2016
- 10. INSURED SMITH, JOHN & SOPHIE
- 11. Signature Present AUTHORIZED SIGNATURE
- 12. Financial Institution on Check
- 13. Payee Last Name

Check 2 (Bottom):

- 1. INSURANCE COMPANY NAME
- 2. Amount
- 3. CHECK NO. 649055
- 4. DATE 06-03-2016
- 5. VOID IF NOT CASHED WITHIN 90 DAYS
- 6. Twenty-two thousand dollars and 00/100
- 7. PAY TO THE ORDER Carlos Santana and Maria Santana & Chase Bank NA and Homeowner Claims Consultants LLC
- 8. P.O. Box 123456 Bonita Springs, FL 3413813-1360
- 9. CHECK NO. Wells Fargo Bank, N.A. Tallahassee, Florida 32303 63-121000
- 10. Signature Present Signature & Present
- 11. Financial Institution on Check
- 12. Payee Last Name
- 13. Payee Last Name

See documents for this claim link

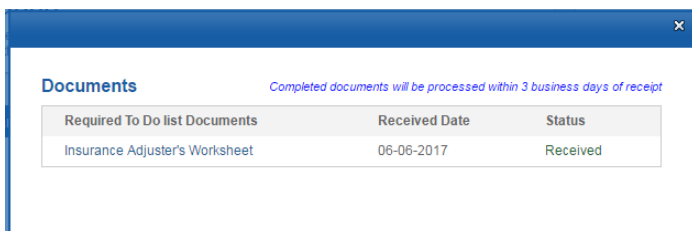
On each of the decision screens, the *See Documents for this Claim* link can be selected to assist the customer with questions about the status of documents that have been sent to Chase Insurance Claims or to know which documents the customer needs to provide.

When the *See Documents for this Claim* link is selected, the Documents screen appears and it displays the following fields.

Field	Details
Required To Do List Documents	Lists the documents the customer is required to send to Insurance Claims.
Received date Status	Indicates the date the document was received by Chase Insurance Claims. <ul style="list-style-type: none">The status will indicate if the document has not yet been received, has been received, or is not accepted. There are various reasons why a document may not be accepted.The Insurance Claims contact telephone number will be displayed on the screen and it can be provided to the customer.
Other Documents	Documents listed in this section are not considered required for the claim process; however, the customer may have provided them.

Provided below are two examples of the Documents screen showing the required documents, the received date, and the status of each document.

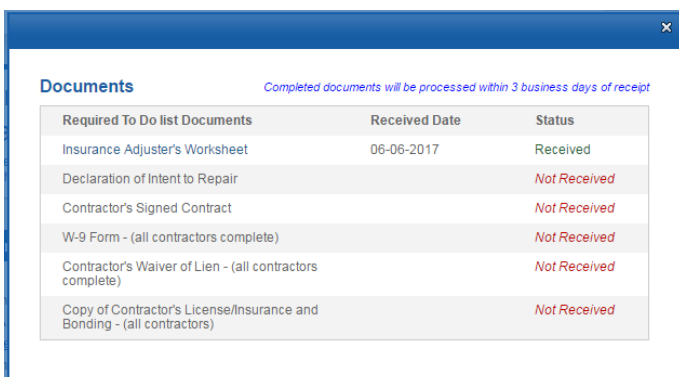
Example 1:



The screenshot shows a window titled "Documents" with a subtitle "Completed documents will be processed within 3 business days of receipt". It contains a table with three columns: "Required To Do list Documents", "Received Date", and "Status".

Required To Do list Documents	Received Date	Status
Insurance Adjuster's Worksheet	06-06-2017	Received

Example 2:



The screenshot shows a window titled "Documents" with a subtitle "Completed documents will be processed within 3 business days of receipt". It contains a table with three columns: "Required To Do list Documents", "Received Date", and "Status".

Required To Do list Documents	Received Date	Status
Insurance Adjuster's Worksheet	06-06-2017	Received
Declaration of Intent to Repair		Not Received
Contractor's Signed Contract		Not Received
W-9 Form - (all contractors complete)		Not Received
Contractor's Waiver of Lien - (all contractors complete)		Not Received
Copy of Contractor's License/Insurance and Bonding - (all contractors)		Not Received

To Do List screen - Optional Links

The To Do List screen provides optional links that can be selected by the Banker to either view additional information or take an additional action.

The last step within each To Do List screen is the "Click here to complete the Transaction" button. This button ***MUST*** be selected to complete the insurance claim check branch process.

Document Delivery Options:

Mail

Fax

Would you like to:

Add another cause of damage?

Add another claim?

View another claim

Provided below is an explanation of the optional links that appear in the two sections on the screen.

Section	Link	Details
Document Delivery Options	Mail	Displays the Chase Insurance Claims mailing address that can be provided to the customer if needed.
	Fax	Displays the Chase Insurance Claims fax number that can be provided to the customer if needed.
Would you like to	Add another cause of damage	Displays the Cause of Property Damage Reported screen for the Banker to add an additional cause of damage to the selected claim. An additional cause of loss must have the same date of damage as the selected claim.
	Add another claim	Displays the Add Another Claim screen for the Banker to confirm that another claim will be added. Once confirmed, the Banker will be redirected to the Tell Us About the Customer's Claim screen to report a new claim.
	View another claim	This link only appears if the loan selected has more than one claim within the system. When this link is selected, the claim list is displayed for the option to select and view another claim with the customer.



Call Chase Insurance Claims using the telephone number below.

☐ 1-877-498-5332

Hours of operation:

- Monday-Friday: 8:00 A.M. – 12:00 A.M. Eastern Time
- Saturday: 8:00 A.M. – 8:00 P.M. Eastern Time

