circit | JPMorganChase

AUDITOR WORKFLOW GUIDE

Submitting JPMorgan Chase audit confirmation requests

Use the JPMorgan Chase provider workflow in Circit so every request reaches the designated audit processing team.

BEFORE YOU START

- Signed Letter of Authority on file
- Full account number for each account
- Confirmation date and entity name

01 SUBMIT A SINGLE REQUEST

01 New request
From Confirmation Requests, select **New Request**.

02 Provider
Search for and select **JP Morgan Chase — Global**.

03 Request type
Choose the type matching the account or product.

04 Team / queue
Where shown, select the correct Target Queue — for example **JP Morgan Chase Bank — EMEA**.

05 Request details
Complete all required fields. One account number per request.

06 Create
Circit routes the request through the designated JPMorgan Chase workflow.

02 SUBMIT REQUESTS IN A BATCH

Multiple
Select Multiple when creating requests, then complete the information for each JPMorgan Chase account.

Import from CSV
For higher volumes, create requests in bulk. Each row carries the request type, routing information and one account number.

03 WHAT HAPPENS NEXT

Created	Routed	Processing	Confirmed
Validated in Circit	To the target queue	Bank audit team	Source-stamped evidence

Track status on the request in Circit — no follow-up chasing required.

Account number required. Requests without one may be delayed or unable to be completed.

No direct email submission. Do not email bankers, client service teams or the processing mailbox.

QUESTIONS OR ESCALATIONS

Use Circit messaging on the request, or email support@circit.io