

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

Circuit 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.



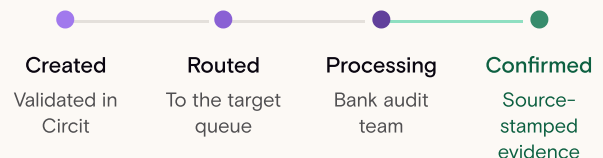
Import from CSV

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



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

03 WHAT HAPPENS NEXT



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



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@circuit.io

