

Step 0 – New Card & Existing Card Behavior

If a customer is setting up a new Chase connection via OFX, or has an existing connection to Chase via OFX, the following message may be displayed...

"OFX server error (15510): Please verify your identity within the next 7 days. Using your desktop computer, go to your bank's website and visit the Secure Message Center for instructions."

This message will be displayed when they press the refresh button on the Enter Expense screen in the status or as a message in the "Last Download" column under the "Personal Credit Cards" section on the User Account Information page. This action will trigger an email to be sent from Chase and a secure message to be placed in Chase's Secure Message Center.

From: J.P. Morgan Chase <no-reply@alertsp.chase.com>
Date: Fri, Feb 26, 2016 at 12:24 PM
Subject: Action Required for Quicken or QuickBooks users
To: <user email address>

We've sent an important communication to your Secure Message Center.

The subject is: Action Required for Quicken or QuickBooks users

Within 7 days of this notice, please sign in to Chase OnlineSM or J.P. Morgan OnlineSM as you normally would. For the best experience please use your desktop computer to do this.

Please do not reply to this message, this mailbox is not monitored.

Thank you for your business,

J.P. Morgan Chase

ABOUT THIS MESSAGE:

Quicken® and QuickBooks® are registered trademarks of Intuit Inc.

This service message was sent to you as a J.P. Morgan Chase customer to provide you with account updates and information about your banking relationship.

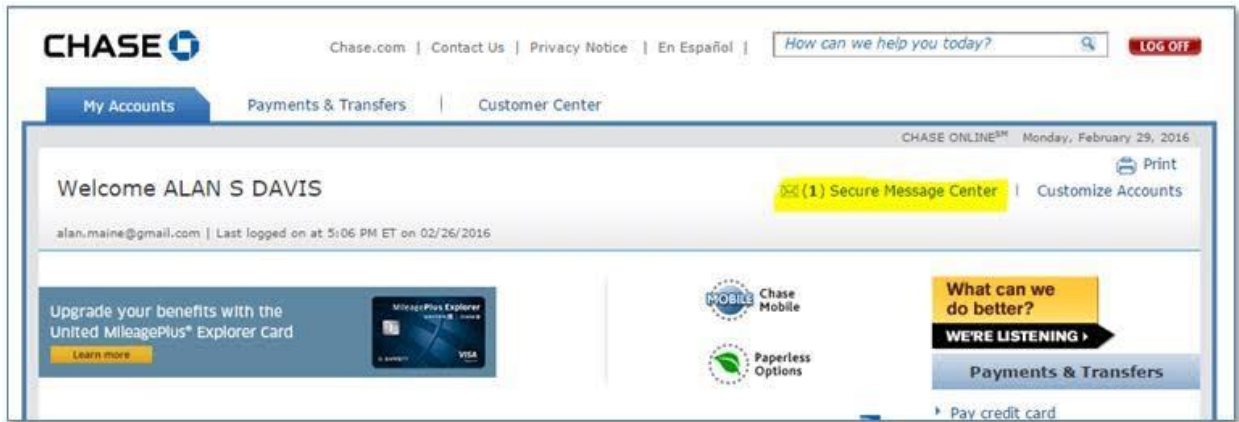
This was sent from an unmonitored mailbox; for options on how to contact us go to chase.com/CustomerService or jpmorgan.com/pages/jpmorgan/contactus. <<http://jpmorgan.com/pages/jpmorgan/contactus>>

Your privacy is important to us. See our online Chase <<https://www.chase.com/resources/privacy-security>> and [jpmorgan](http://jpmorgan.com) online <<https://www.jpmorgan.com/pages/privacy>> Security Center to learn how to protect your information

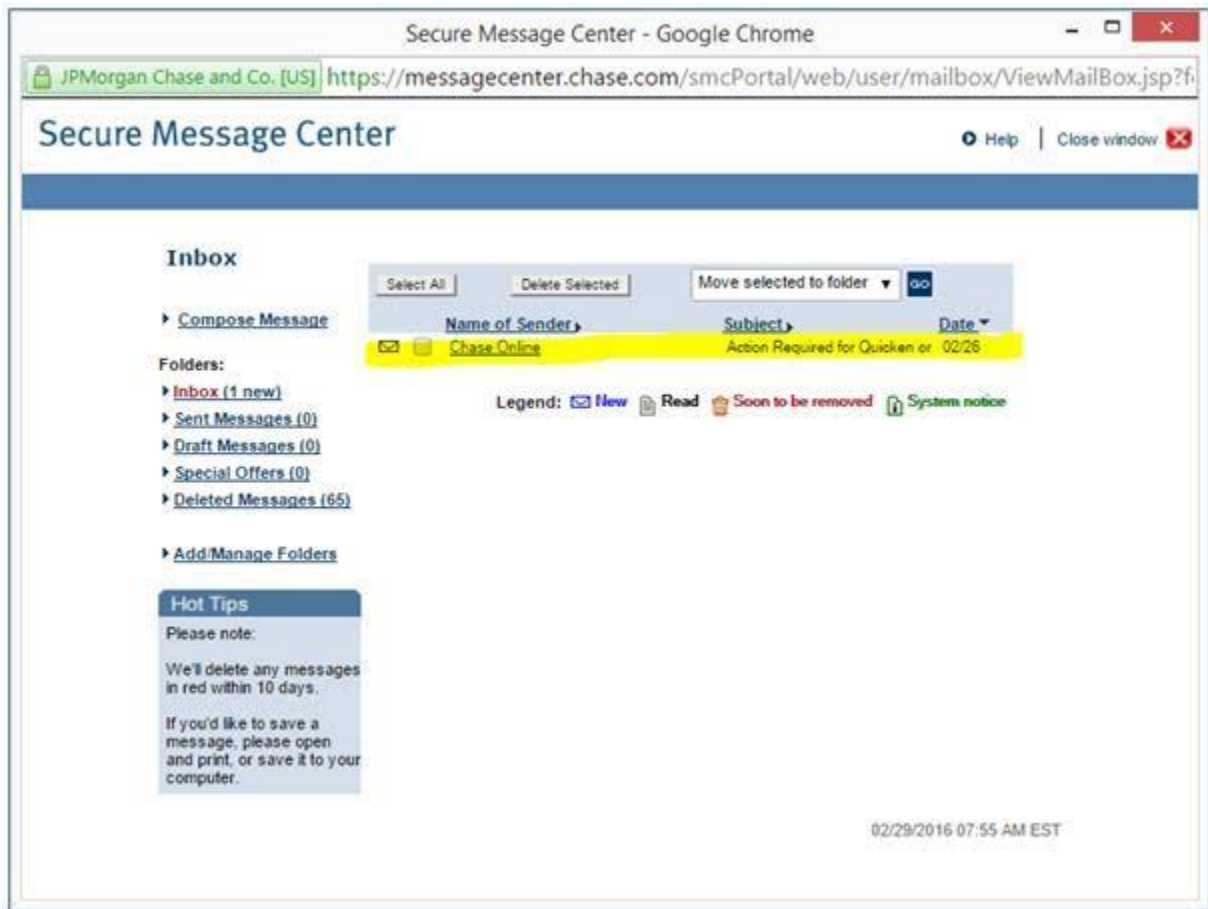
JPMorgan Chase Bank, N.A. Member FDIC
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Note: I have seen situations where Chase allows the first request to pull charges, but subsequent requests will generate the message above. To a customer this may appear like the download is working at one point, then stops. In this scenario, even if the attempt is successful an email is sent from Chase and a message will appear in their Secure Message Center in the Chase Web portal.

Step 1 – Login to Chase and open the Secure Message Center.



Step 2 – Within the Secure Message Center, locate the most recent message with the subject “Action Required for Quicken or QuickBooks users”



Step 3 –Open the message and click the link, subject “confirm your identity now”

Secure Message Center - Google Chrome

JPMorgan Chase and Co. [US] https://messagecenter.chase.com/smcPortal/web/user/mailbox/ShowMsg.jsp?fid=5823925

Secure Message Center

Help | Close window

Read Message

Delete Selected | Move to folder | oo | Reply | Save

Compose Message | Printable View

Folders:

- Inbox (1 new)
- Sent Messages (0)
- Draft Messages (0)
- Special Offers (0)
- Deleted Messages (65)

Add/Manage Folders

Hot Tips

Messages and attachments are scanned for viruses.

Click "Save" to archive messages to your computer.

Date: 02-26-2016 17:20:32

From: Chase Online

Subject: Action Required for Quicken or QuickBooks users

Message:

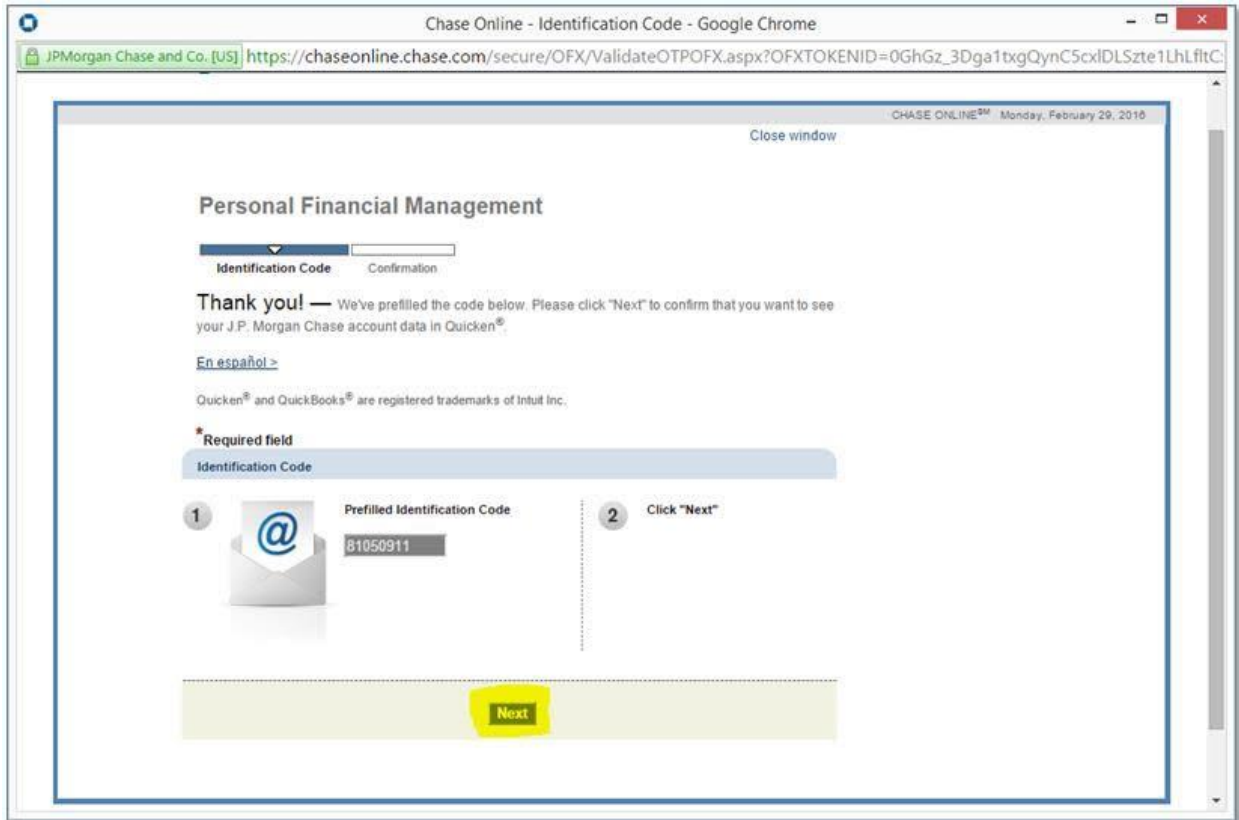
The privacy and security of your financial information is very important to us.

Please **confirm your identity now** so your Personal Financial Management (PFM) software, like Quicken® or QuickBooks®, can download your account information.

Keep in mind:

- The link above will only work to confirm your identity if used within 7 days of this notice. If you are past the 7 days and need a new link sent, please log into your PFM software again, and a new message containing a new link will be sent to your Secure Message Center online, or contact us:
 - Chase OnlineSM Clients: 1-877-CHASEPC (1-877-242-7372)
 - J.P. Morgan OnlineSM Clients: Use the Website Support number listed at the top of the website.
 - Chase Commercial Online Service Center: 877-226-0071. For Public Government, Healthcare and Higher Education Banking Clients, please use 855-893-2223.
- If you have multiple accounts, you may be asked to confirm your identity for each account. You may get more than one notification and

Step 4 –After clicking the link, a window will open asking you to confirm the code to allow access, click the OK Next button.



Step 5 –After the OK Next button, a confirmation page is displayed. No additional work is needed.

