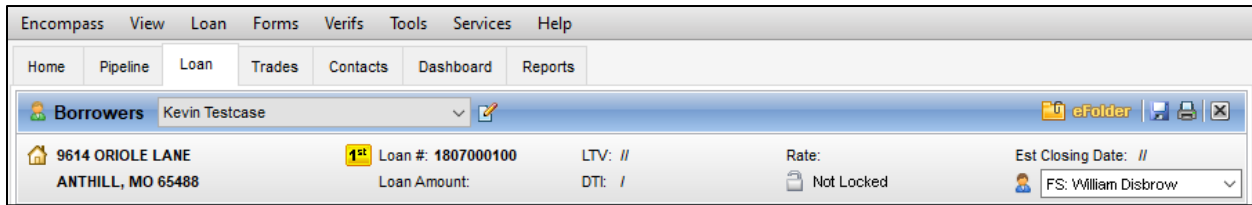
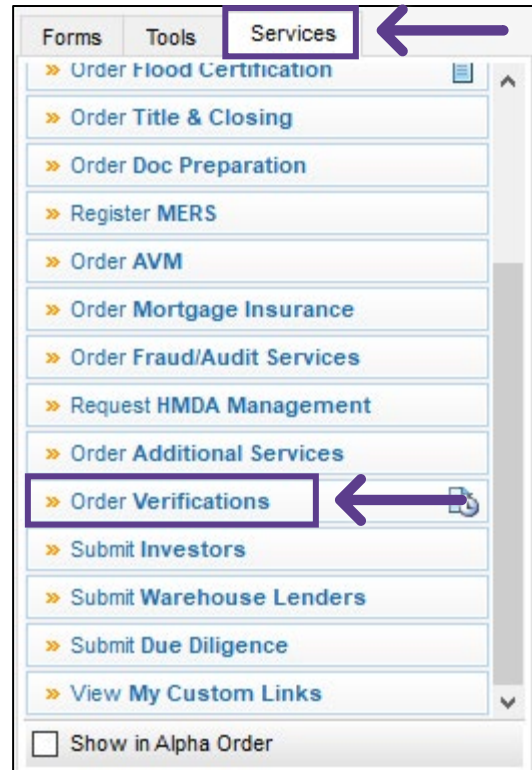


1. Start by logging in and opening the applicants loan file.



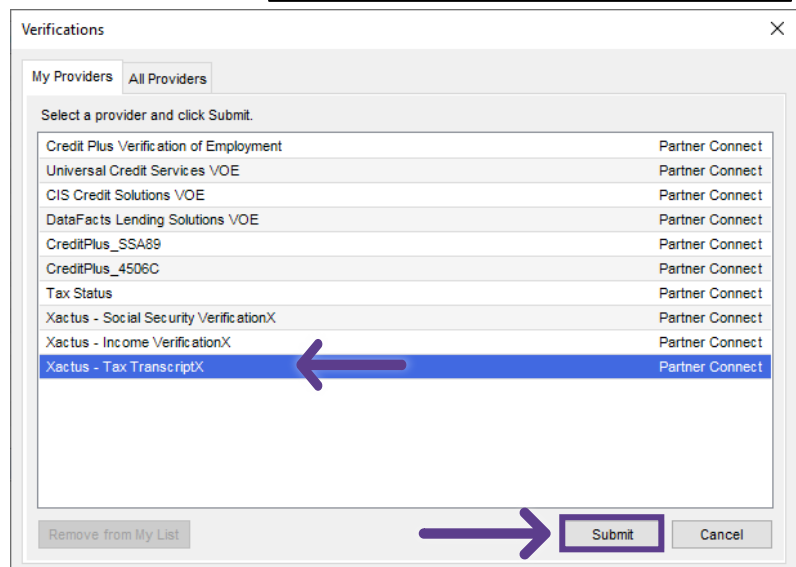
The screenshot shows the Encompass software interface. At the top, there are tabs for Encompass, View, Loan, Forms, Verifs, Tools, Services, and Help. Below these are sub-tabs for Home, Pipeline, Loan, Trades, Contacts, Dashboard, and Reports. The main area displays the loan file for Kevin Testcase, including the address 9614 ORIOLE LANE, ANTHILL, MO 65488, and loan details like Loan #: 1807000100, LTV: //, Rate: //, and Est Closing Date: //.

2. Click on the Services tab in the bottom left corner. Select Order Verifications.



The screenshot shows the Services tab in the Encompass software interface. A purple box highlights the 'Services' tab, and a purple arrow points to it. Below the tab, a list of services is displayed, including Order Flood Certification, Order Title & Closing, Order Doc Preparation, Register MERS, Order AVM, Order Mortgage Insurance, Order Fraud/Audit Services, Request HMDA Management, Order Additional Services, Order Verifications, Submit Investors, Submit Warehouse Lenders, Submit Due Diligence, and View My Custom Links. A purple box highlights 'Order Verifications', and a purple arrow points to it.

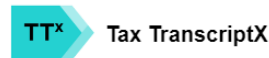
A window will pop-up allowing you to choose your Provider. Then, click Submit to launch the order form.



The screenshot shows the Verifications window in the Encompass software interface. It has tabs for My Providers and All Providers. Below the tabs, there is a table of providers. A purple box highlights the 'Xactus - Tax TranscriptX' provider, and a purple arrow points to it. At the bottom of the window, there is a 'Submit' button, which is highlighted with a purple box and a purple arrow.

Provider	Partner Connect
Credit Plus Verification of Employment	Partner Connect
Universal Credit Services VOE	Partner Connect
CIS Credit Solutions VOE	Partner Connect
DataFacts Lending Solutions VOE	Partner Connect
CreditPlus_SSA89	Partner Connect
CreditPlus_4506C	Partner Connect
Tax Status	Partner Connect
Xactus - Social Security VerificationX	Partner Connect
Xactus - Income VerificationX	Partner Connect
Xactus - Tax TranscriptX	Partner Connect

- Start by choosing TTX (Form 4506-C) and the Transcript Type. Your applicant information will pre-populate from the 1003. If the loan file is joint, both borrowers will appear on the order screen. To order for only one borrower, click the drop-down arrow next to the borrower's name and change the selection for the second borrower to None.



Operator ID: xactus.demo [Switch Operator ID](#)

TTX (Form 4506-C) TTX (Form 8821/Halcyon)

Transcript Type
Personal Transcripts

Loan Number/ID
2409000212

1a. Current name

Borrower
Nickie Green

First Name
Nickie

Middle Initial

Last Name
Green

Suffix

1b. First taxpayer identification number

Social Security Number
123-00-3333

1c. Previous name shown on the last return filed if different from line 1a

First Name Middle Initial Last Name Suffix

2a. Spouse's current name(if joint return and transcripts are requested for both taxpayers)

Borrower
Alan Brown

First Name
Alan

Middle Initial

Last Name
Brown

Suffix

2b. Spouse's taxpayer identification number

Social Security Number
123-00-4444

Let Spouse's Previous Name shown on the last return filed if different from line 2a

First Name Middle Initial Last Name Suffix

3a. Current address (including apt, room, or suite no), city, state, and ZIP code

Street Address
100 TERRACE AV

City
West Haven

State
CT

Zip
06516

4. Previous address shown on the last return filed if different from line 3

Street Address City State Zip

- The top borrower position will now allow you to choose which borrower to pick.

1a. Current name

Borrower
Nickie Green

First Name
Nickie

Middle Initial

Last Name
Green

Suffix

1b. First taxpayer identification number

Social Security Number
123-00-3333

return filed if different from line 1a

First Name Middle Initial Last Name Suffix

- Select the Transcript and Form needed under #6 and #7 as well as the Years Requested under #8.

6. Transcript requested

☒ 1040 ☐ A. Return Transcript ☐ B. Account Transcript ☐ C. Record of Account (all available forms)
If more than one form is needed choose option C

7. Form W-2, Form 1099 series, Form 1098 series or Form 5495 series transcript

☐ W2 ☒ 1099 (all available forms) ☐ 1098 ☐ 5498
If more than one form is needed choose 1099

8. Years or Period Requested *

☒ 2023 ☒ 2022 ☒ 2021 ☒ 2020


Year(s) requested will apply to all above selections and charged per product, per year


6. Next, upload the 4506-C from the EFolder or local drive. Include a Completion Certificate for an e-signed order if applicable. Ensure the correct email address is entered to be notified when the order is complete. When all is complete, click Submit.

→ ☒ Upload 4506C * ☐ E-mail Borrower(s) 4506C to e-sign
Uploaded 4506C must match products and years selected above

4506C * **Completion Certificate**

4506-C.pdf


Drag and drop file here or click


Drag and drop file here or click

IRS POA form, or court stamped documentation is required with the upload if the 4506-C was signed by an individual acting on behalf of the borrower(s)



A Completion Certification (e-sign audit log) is required on all requests containing an e-signed. If your completion Certificate was not included with the selected, please provide the separate document here. Any request with an e-signed received without a Completion Certificate will be rejected

E-mail Notification
You can choose to receive an e-mail notification when this order is complete

☒ Send Notification

→ **Submit**

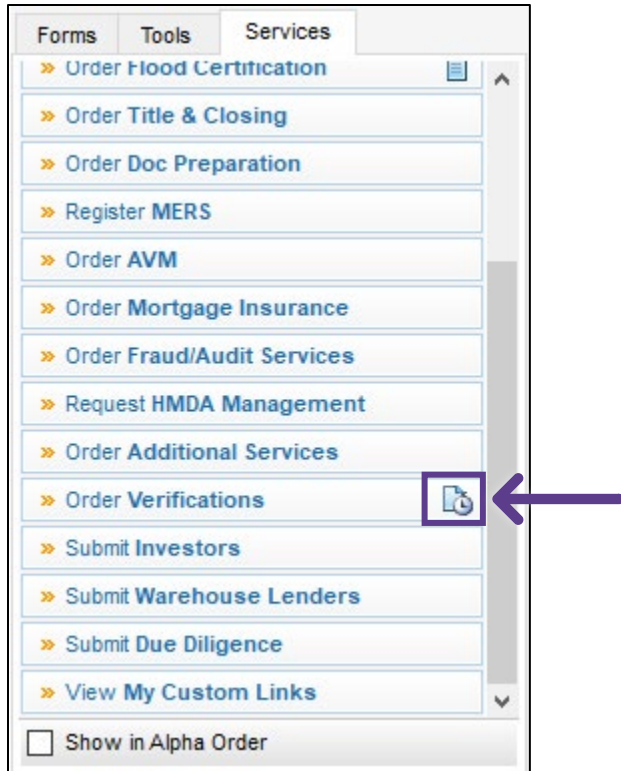
7. The order has been submitted and an email will be sent to you when complete.

 **Tax TranscriptX**

Borrower		Co-Borrower	
Name	NICKIE GREEN	Name	ALAN BROWN
SSN	123-00-3333	SSN	123-00-4444
Address	100 TERRACE AV WEST HAVEN, CT 06516	Address	100 TERRACE AV WEST HAVEN, CT 06516

Order Details	
Report ID	485811
Loan Number	2307000328
Ordered By	Xactus Test
Status	Quality Control
Ordered	08/10/2023 01:09:23 PM
Transcript Type	Tax TranscriptX (1040) 4-Year (a), Tax TranscriptX (1099) 4-Year
Requested Year(s)	12-31-2022, 12-31-2021, 12-31-2020, 12-31-2019

8. After receiving the Completion email from Xactus/IRS, the report may be immediately viewed on the Xactus360 website or in eFolder (after a small delay/after your loan file is closed/unlocked). The order and status can also be found by clicking the Check Status icon next to Verifications. Please note that it could take up to 20 minutes for the completed report to be returned to the Encompass e-Folder.



9. Click the order needed and click Retrieve.

Services

From Service Providers						
Att	Name ▲	Requested From	For Borrower Pair	Status	Date	
	Verifications	Xactus - Social Security NotificationX	Nickie Green	Requested	08/23/23	
	Verifications	Xactus - Income VerificationX	Nickie Green	Requested	08/25/23	
	Verifications	Xactus - Tax TranscriptsX	Nickie Green	Requested	08/23/23	
	Verifications	Xactus - Income VerificationX	Nickie Green	Requested	08/23/23	
	Verifications	Xactus - Social Security VerificationX	Nickie Green	Requested	09/11/23	

Retrieve

New Document

Cancel

*Please note Encompass Partner Connect verifications use Dynamic & Default E-folders.

1. The Default folder will be labeled verifications and remain in processing / requested status. This is the folder that will allow you to utilize the check status button next to the order verifications option and return to the report screen.
2. The Dynamic folder will return once your order is completed and be labeled with your product and vendor name and say Processing / Received. This is where your completed document will be located.

Encompass eFolder

eFolder Documents Help

Documents Preliminary Conditions Underwriting Conditions Post-Closing Conditions Delivery Conditions Packages History

Documents View Standard View

Document Group (All Documents) Stacking Order None

Documents (20)

Att	File Name	Description	For Borrower Pair	Type	Access	For Milestone	Status	Date
2	Tax TranscriptX (494266)	Tax TranscriptX (1065)1-Year	All	Settlement Service	AC, CL, FN, LD...	Processing	Received	08/25/23
1	Verifications	Verifications	All	Settlement Service	AC, CL, FN, LD...	Processing	Requested	08/25/23

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.