

How to Order Tax Transcripts Within Calyx Point (Xactus360)

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

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	Name	NICKIE	GREEN	Name					E E
Borrower Information				1		·	-		a
Loan Application-1	SSN	123-00-3333 DOB 01/01	/1999	SSN	DO	в			2
Loan Application-2									
Loan Application-3									
Loan Application-5	Best Contact	▼ Nickn	ame	Best Conta	t 🔍	Nickname			
Loan Application-Addendum				2001 001110			1		
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2. Click on the Services drop-down menu and navigate to Verifrications, then click Request Verifications.

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Borrower Information	~	Name				Initial Disclosure	s	>						an
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Loan Application-3			-			Verifications		>	Request Verific	ations				
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Loan Application-Addendum Loan Application-Section 1		H Phone		B Phor	ne		_	н	Populate Empl	oyment <mark>(</mark> 1003)				

 Select the Verification Services Provider. Then select the Request and Verification type: Request Type – Select Borrower: toggle between borrower and co-borrower if joint Verification Type – Check the box for the request needed and choose the years from the dropdown list. Only one order can be placed at a time. Authorization Method – Browse and upload the 4506C. When all information is entered correctly, please click Submit.

Request Verifications			
Verification Services Provider Xactus IRS-Direct	800-243-0120 <u>Getting</u>	Started	
Generic Verification Request			
Order 7	Request Type		
 Order New Verification 	Nickie Green	C (No Co-Borrower Name)	
C Upgrade Order	CCN. 123.00.3333	CON.	
C Check Status	SSN: 125-00-5555	55N:	
Primary Borrower Order Reference Number	DOB: 01/01/1999	DOB:	
1	Verification Type:		1
Co-Borrower Order Reference Number	Return Transcript (1040a)	2010 2010 2020 2021	1
J		2016, 2019, 2020, 2021	1
	Return Transcript (1040b)	2018, 2019, 2020, 2021 🖉	1
Additional Instructions, Comments	Return Transcript (1040c)	2018, 2019, 2020, 2021 💌]
^	Personal (W2/1099)	W2 - 2018, 2019, 2020, 2021 💌]
	Business (1065/1120)	1065a - 2018, 2019, 2020, 2021 👻	1
	E-Signature	· · · · · · · · · · · · · · · · · · ·	7
Pay by credit card Enter Credit Card	Jocument Attached	pdf Browse	
Press F1 for help	Submit Close		
	Xactus IRS-Direct Logir	1	
Input the user ID and password fo	Account #:	Need Help? Xactus IRS-Direct	
your selected credit agency, then	User ID: mwitt		
click OK		800-243-0120 Getting Started	
	Password:		
	Save P	assword	
		Cancel	

4. The following will appear letting you know the order is being processed. Click OK.



5. You will be taken back to the Request Verifications screen where you can check the status of the order or request additional Verifications. Also notice that the primary borrower is also assigned a Reference number (Report ID) for the current order.

Xactus IRS-Direct	 800-243-0120 Gettin/ 	<u>g Started</u>	
eneric Verification Request			
-Order	- Request Type - Select Borrower		
O Order New Verification	Nickie Green	O (No Co-Borrower Name)	
C Upgrade Order	CON: 123-00-3333	CCNI-	
Check Status	33W. 120 00 0000	33N. J	
Primary Borrower Order Reference Number	DOB: 01/01/1999	DOB:	
44779639	Verification Type:		
Co-Borrower Order Reference Number	Return Transcript (1040a)	2010 2019 2020 2021	
	E Beturn Transmitt (1040b)	2010, 2013, 2020, 2021	
	Return Transcript (10400)	2018, 2019, 2020, 2021	_
Additional Instructions, Comments	Return Transcript (1040c)	2018, 2019, 2020, 2021	_
^	Personal (W2/1099)	W2 - 2018, 2019, 2020, 2021	-
	Business (1065/1120)	1065a - 2018, 2019, 2020, 2021	-
	E-Signature	,	
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	A: the arisestican Matheads		
~	Authorization Method:		
,	Document Attached	×	
Pay by credit card Enter Credit Card	Jsers\mwitt\Desktop\TEST\4506-C	.pdf Browse	
	Submit Close		

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