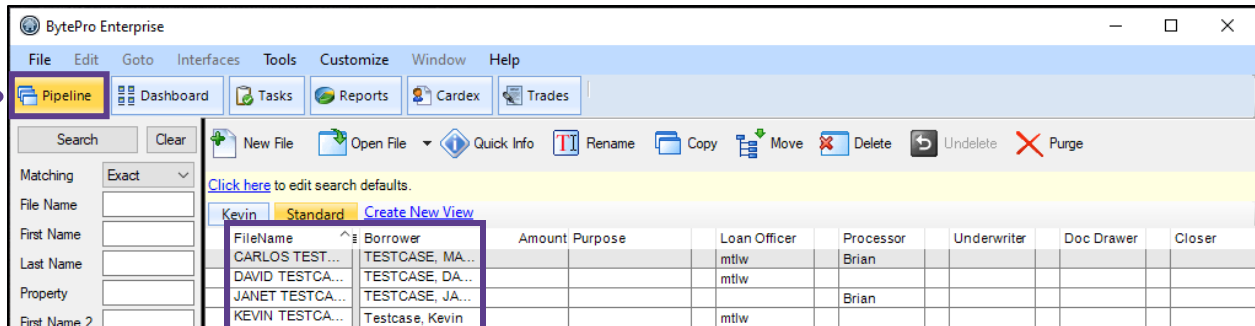
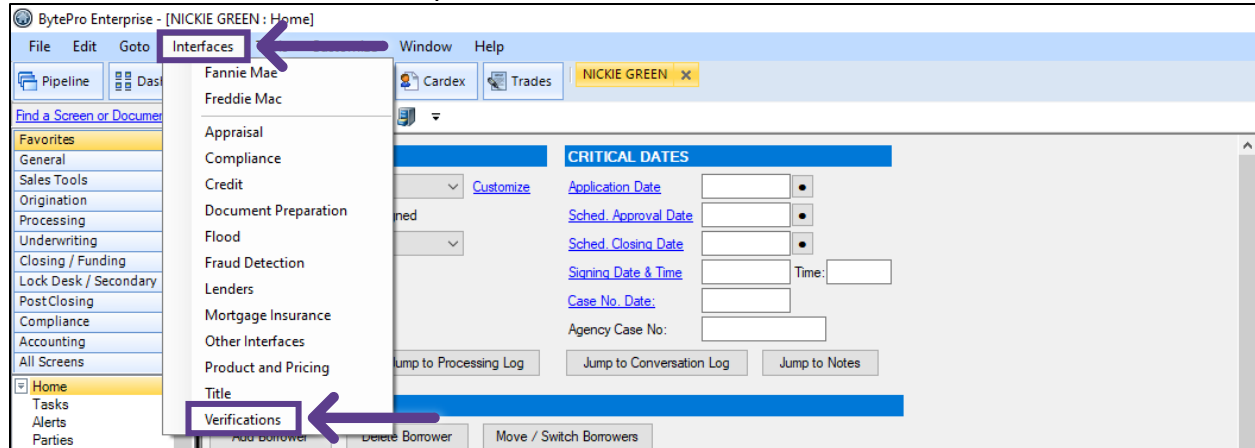


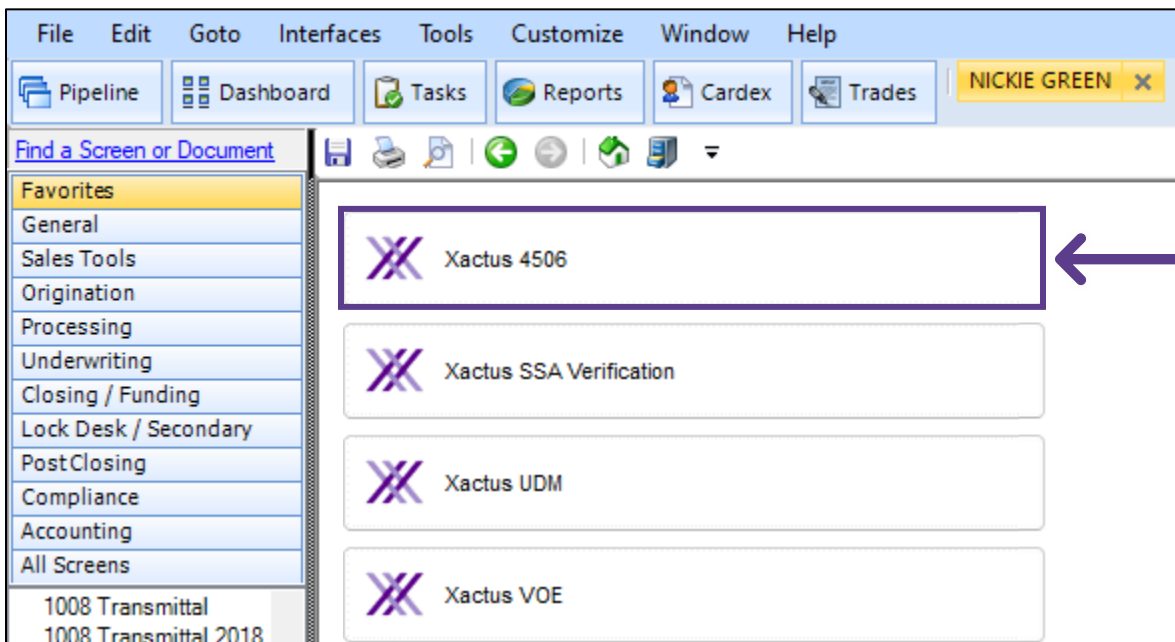
1. Start by logging in and opening the borrowers loan file from the Pipeline.



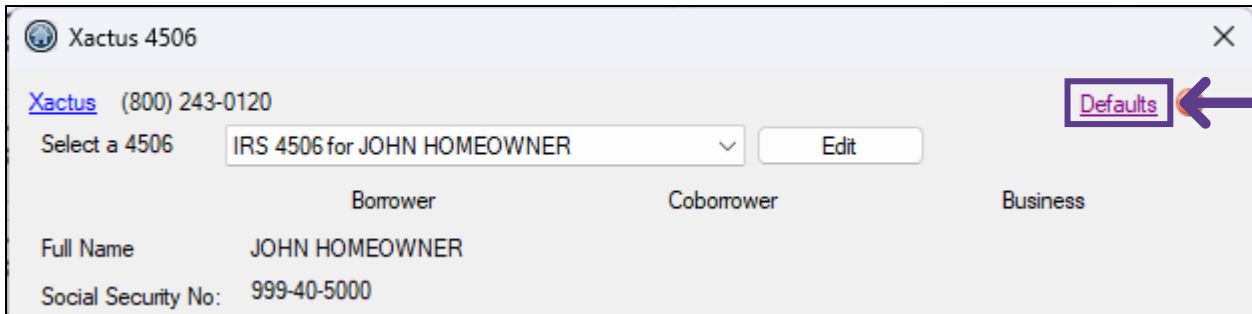
2. Then, click the Interfaces dropdown and select Verifications.



3. A list of providers will appear, double click Xactus 4506 to open the order screen.



4. Enter your user ID and password by clicking Defaults.



Xactus 4506

[Xactus](#) (800) 243-0120

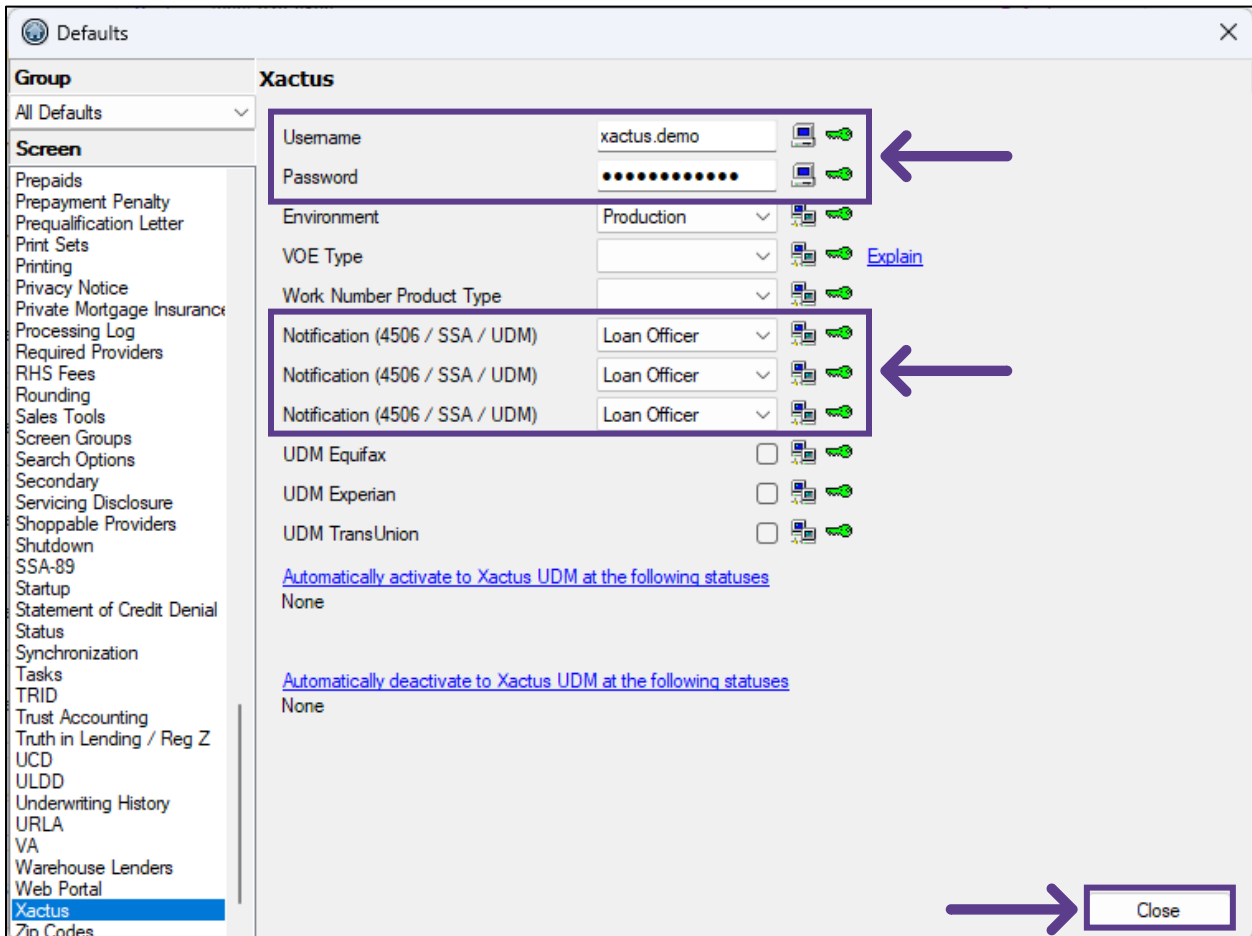
Select a 4506

Borrower Coborrower Business

Full Name JOHN HOMEOWNER

Social Security No: 999-40-5000

5. Once the username, password, and notification party are entered, click Close.



Defaults

**Group** Xactus

All Defaults

**Screen**

- Prepays
- Prepayment Penalty
- Prequalification Letter
- Print Sets
- Printing
- Privacy Notice
- Private Mortgage Insurance
- Processing Log
- Required Providers
- RHS Fees
- Rounding
- Sales Tools
- Screen Groups
- Search Options
- Secondary
- Servicing Disclosure
- Shoppable Providers
- Shutdown
- SSA-89
- Startup
- Statement of Credit Denial
- Status
- Synchronization
- Tasks
- TRID
- Trust Accounting
- Truth in Lending / Reg Z
- UCD
- ULDD
- Underwriting History
- URLA
- VA
- Warehouse Lenders
- Web Portal
- Xactus**
- Zin Codes

Username

Password

Environment

VOE Type   [Explain](#)

Work Number Product Type

Notification (4506 / SSA / UDM)

Notification (4506 / SSA / UDM)

Notification (4506 / SSA / UDM)

UDM Equifax ☐

UDM Experian ☐

UDM TransUnion ☐

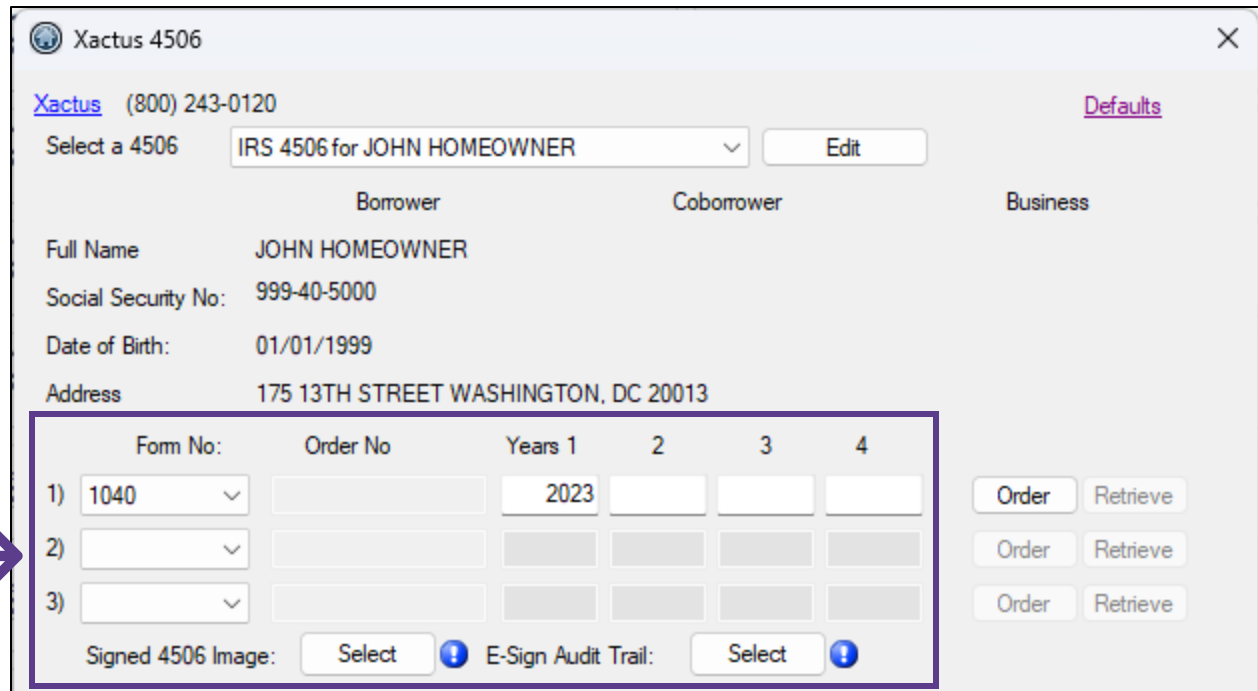
[Automatically activate to Xactus UDM at the following statuses](#)

None

[Automatically deactivate to Xactus UDM at the following statuses](#)

None

6. Next, select the Form No. and years to request, then attach the 4506C. If the order was e-signed, attached the E-Sign Audit log as well.



Xactus 4506

Xactus (800) 243-0120 Defaults

Select a 4506 IRS 4506 for JOHN HOMEOWNER Edit

Borrower Coborrower Business

Full Name JOHN HOMEOWNER

Social Security No: 999-40-5000

Date of Birth: 01/01/1999

Address 175 13TH STREET WASHINGTON, DC 20013

	Form No:	Order No	Years	1	2	3	4
1)	1040		2023				
2)							
3)							

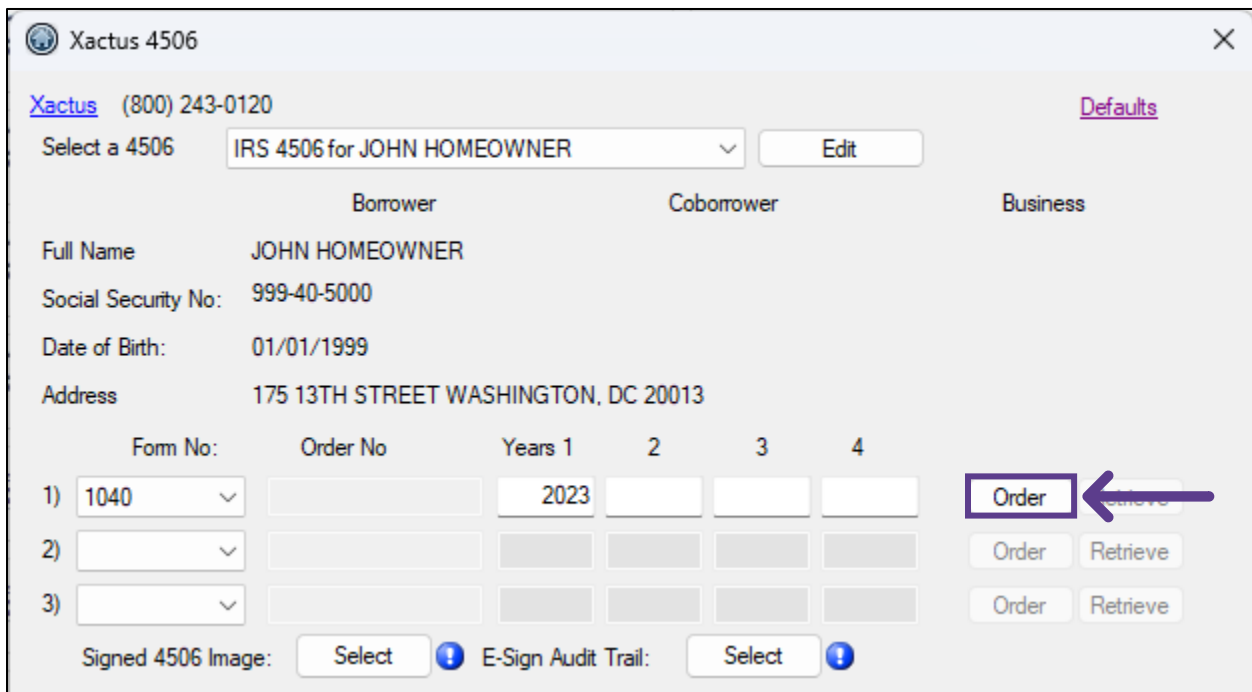
Signed 4506 Image: Select E-Sign Audit Trail: Select

Order Retrieve

Order Retrieve

Order Retrieve

7. When complete, click Order.



Xactus 4506

Xactus (800) 243-0120 Defaults

Select a 4506 IRS 4506 for JOHN HOMEOWNER Edit

Borrower Coborrower Business

Full Name JOHN HOMEOWNER

Social Security No: 999-40-5000

Date of Birth: 01/01/1999

Address 175 13TH STREET WASHINGTON, DC 20013

	Form No:	Order No	Years	1	2	3	4
1)	1040		2023				
2)							
3)							

Signed 4506 Image: Select E-Sign Audit Trail: Select

Order Retrieve

Order Retrieve

Order Retrieve

8. Under Status Message, it will appear as Pending until complete. Once complete, you will receive an email. Return to this screen and click Retrieve to populate the order.

Xactus 4506

Xactus (800) 243-0120

Defaults

Select a 4506

IRS 4506 for JOHN HOMEOWNER

Edit

Borrower

Coborrower

Business

Full Name

JOHN HOMEOWNER

Social Security No:

999-40-5000

Date of Birth:

01/01/1999

Address

175 13TH STREET WASHINGTON, DC 20013

Form No:

Order No

Years

1

2

3

4

1)

1099

62549848

2023

Order

Retrieve

2)

Order

Retrieve

3)

Order

Retrieve

Signed 4506 Image:

Select

E-Sign Audit Trail:

Select

Status Messages (double-click to view long messages)

Date

Message

8/15/24 2:27:49 PM

Request to order a 4506. Response status is: Pending. Your Verification request is being proc...

Documents (double-click on a document to view it)

Date

Name

Close

9. The report can be viewed by double clicking the request under Documents.

Xactus 4506

Xactus (800) 243-0120

Defaults

Select a 4506

IRS 4506 for JOHN HOMEOWNER

Edit

Borrower

Coborrower

Business

Full Name

JOHN HOMEOWNER

Social Security No:

999-40-5000

Date of Birth:

01/01/1999

Address

175 13TH STREET WASHINGTON, DC 20013

Form No:

Order No

Years

1

2

3

4

1)

1099

62549848

2023

Order

Retrieve

2)

Order

Retrieve

3)

Order

Retrieve

Signed 4506 Image:

Select

E-Sign Audit Trail:

Select

Status Messages (double-click to view long messages)

Date	Message
8/15/24 2:34:10 PM	Request to status 4506. Response status is: Success. Your order has been completed.
8/15/24 2:27:49 PM	Request to order a 4506. Response status is: Pending. Your Verification request is being proc...

Documents (double-click on a document to view it)

Date	Name
8/15/24 2:34:10 PM	Xactus IRS4506

Close

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

08/15/2024