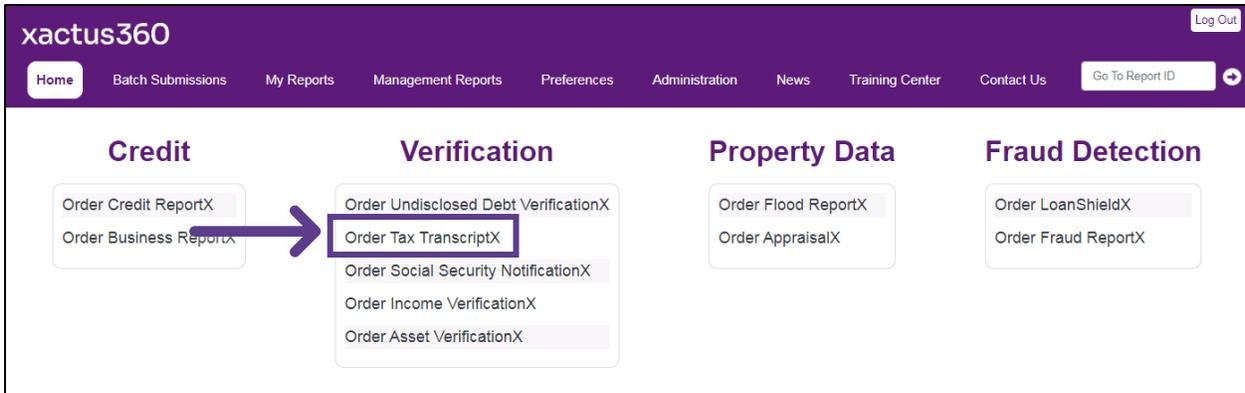
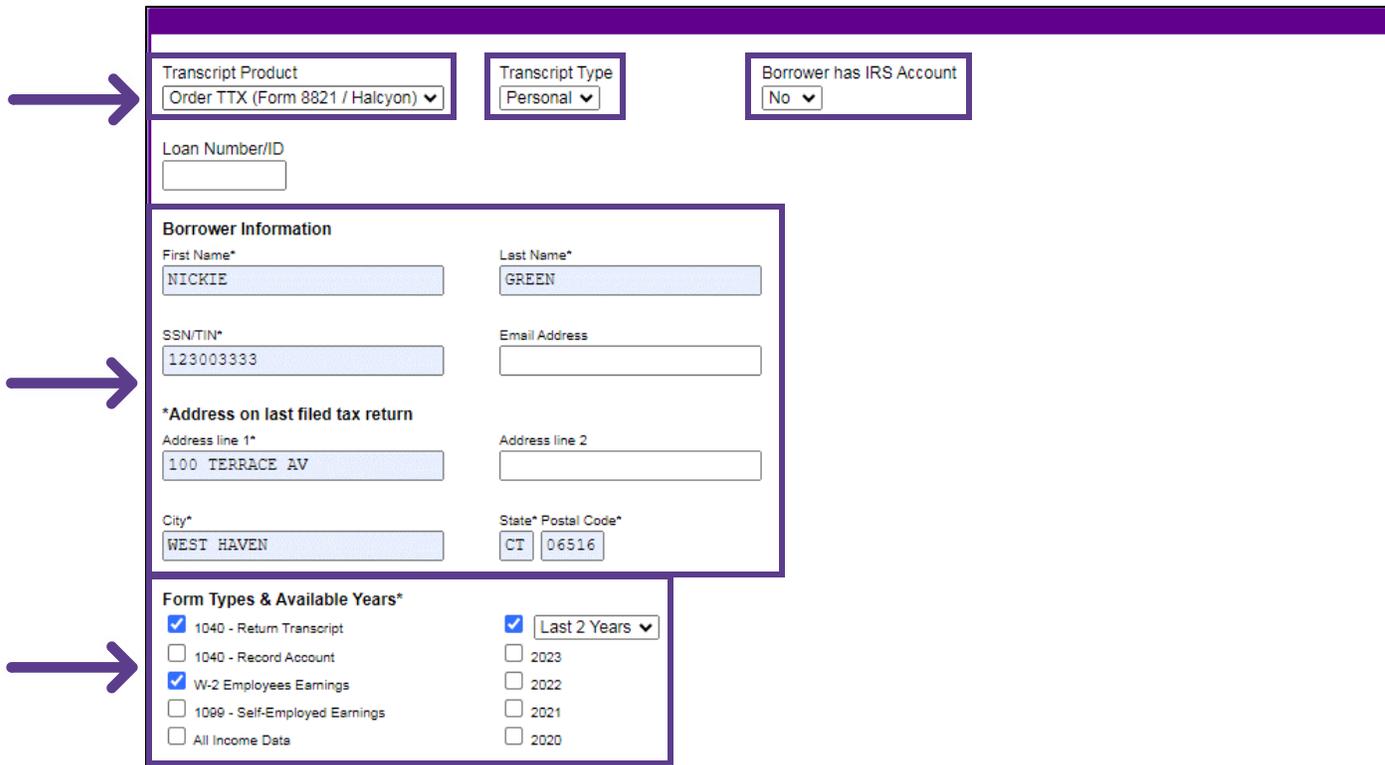


1. Start by logging into Xactus360 and from the home page, click Order Tax TranscriptX.



2. Under 'Transcript Product' select Order TTX (Form 8821 / Halcyon). Then select either Personal or Business under 'Transcript Type'. Choose whether the borrower has an IRS account or not and complete all fields for the order including Name, SSN, Email Address, Address, and which Form Type and Available Years are needed.



The screenshot shows the order form for a Tax Transcript. The form is divided into several sections:

- Transcript Product:** A dropdown menu set to 'Order TTX (Form 8821 / Halcyon)'. A purple arrow points to this field.
- Transcript Type:** A dropdown menu set to 'Personal'.
- Borrower has IRS Account:** A dropdown menu set to 'No'.
- Loan Number/ID:** An empty text input field.
- Borrower Information:** A section containing several fields:
  - First Name\*: NICKIE
  - Last Name\*: GREEN
  - SSN/TIN\*: 123003333
  - Email Address: (empty)
  - \*Address on last filed tax return:
    - Address line 1\*: 100 TERRACE AV
    - Address line 2: (empty)
    - City\*: WEST HAVEN
    - State\* Postal Code\*: CT 06516
- Form Types & Available Years\*:** A section containing several checkboxes and a dropdown menu:
  - 1040 - Return Transcript
  - 1040 - Record Account
  - W-2 Employees Earnings
  - 1099 - Self-Employed Earnings
  - All Income Data
  - Last 2 Years (dropdown menu)
  - 2023
  - 2022
  - 2021
  - 2020

Purple arrows point to the Transcript Product, Borrower Information, and Form Types & Available Years sections.

3. The 8821/authorization form is mandatory and can be uploaded by clicking Choose File and ensure the correct email address is listed for the Notification and enter a secondary email if needed. When all is complete, click Submit.

**Upload Documents:**

8821: (\*Mandatory, Auth and 8821 will upload as one pdf document - auth to be extracted by Halcyon on their end)

[Choose File](#) 8821.pdf

IRS POA form 2848, or court stamped documentation is required with the upload if the 8821 was signed by an individual acting on behalf of the borrower(s).

**Notification:**

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

E-Mail Notification:

Send notification to:

Secondary email notification address:

[Submit](#)

4. The 8821 Form can be downloaded by clicking the link on the left-hand side under Resources.

Resources

[8821 Form](#)

[Set Borrower up with IRS account](#)

5. It is recommended that the borrower have an account with the IRS prior to submitting the order for the fastest turnaround time. If the borrower does not have an account, one can be setup prior to your order by clicking the link on the left-hand side under Resources.

Resources

[8821 Form](#)

[Set Borrower up with IRS account](#)

6. If at any time additional transcripts are needed or you need to update the order information, click Add Transcripts or Update Form/Borrower under Actions.

**Actions:**

[Add Transcripts](#)

[Update Form/Borrower](#)

7. In some instances, the status will read 'Action Needed'.

Documents									
		Document Stamp	Document Type	Data Type	Form	Year	Message Text	Status	Cancel All
<a href="#">View</a>	<a href="#">Download</a>	05-10-2024, 10:07:32 AM	8821	PDF					
<a href="#">View</a>	<a href="#">Download</a>	05-10-2024, 10:37:40 AM	8821-transcript	PDF	1040	Year 1	1040 - Return Transcript	Ready	
<a href="#">Fix now</a>	<a href="#">Download</a>	05-10-2024, 10:37:44 AM	8821-transcript	PDF	1040	Year 2	1040 - Return Transcript	Action Needed	<a href="#">Cancel</a>

8. Click the Action Needed link to view the message of what should be corrected.

**Action Message** ✕

▶ If the SSN on the signed 8821 is correct, just edit the SSN on the order then resubmit. \nIf the SSN on the order is correct, have the authorized user sign a new 8821.  
If the EIN on the signed 8821 is correct, just edit the EIN on the order then resubmit. \nIf the EIN on the order is correct, have the authorized user sign a new 8821.

9. Once the updated information is confirmed, click Fix now to submit the corrections.

Documents									
		Document Stamp	Document Type	Data Type	Form	Year	Message Text	Status	Cancel All
<a href="#">View</a>	<a href="#">Download</a>	05-10-2024, 10:07:32 AM	8821	PDF					
<a href="#">View</a>	<a href="#">Download</a>	05-10-2024, 10:37:40 AM	8821-transcript	PDF	1040	Year 1	1040 - Return Transcript	Ready	
<a href="#">Fix now</a>	<a href="#">Download</a>	05-10-2024, 10:37:44 AM	8821-transcript	PDF	1040	Year 2	1040 - Return Transcript	Action Needed	<a href="#">Cancel</a>

10. The areas requiring attention will be outlined in red. Make the corrections and click Submit.

Transcript Product: Order TTX (Form 8821 / Halcyon) | Transcript Type: Personal | Borrower has IRS Account: No

Loan Number/ID: 235689

**Borrower Information**

First Name\*: CHRISTMAS | Last Name\*: SNOW

SSN/TIN\*: 001001112 | Email Address: xactus@xactus.com

**\*Address on last filed tax return**

Address line 1\*: 99 NORTH POLE | Address line 2:

City\*: MILFORD | State\* Postal Code\*: CT 06460

**Form Types & Available Years\***

1040 - Return Transcript |  Last 2 Years

1040 - Record Account |  2023

W-2 Employees Earnings |  2022

1099 - Self-Employed Earnings |  2021

All Income Data |  2020

**Upload Documents:**

8821: (\*Mandatory, Auth and 8821 will upload as one pdf document - auth to be extracted by Halcyon on their end)

Choose File | No file chosen

IRS POA form 2848, or court stamped documentation is required with the upload if the 8821 was signed by an individual acting on behalf of the borrower(s).

**Notification:**

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

E-Mail Notification:

Send notification to: xactus@xactus.com

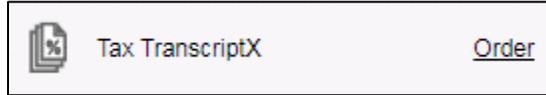
Secondary email notification address:

Submit

11. The updates will be submitted, and an email will be sent when the order is complete.

Documents									
		Document Stamp	Document Type	Data Type	Form	Year	Message Text	Status	Cancel All
<a href="#">View</a>	<a href="#">Download</a>	05-10-2024, 10:07:32 AM	8821	PDF					
<a href="#">View</a>	<a href="#">Download</a>	05-10-2024, 10:37:40 AM	8821-transcript	PDF	1040	Year 1	1040 - Return Transcript	Ready	
<a href="#">Fix now</a>	<a href="#">Download</a>	05-10-2024, 10:37:44 AM	8821-transcript	PDF	1040	Year 2	1040 - Return Transcript	Action Needed	<a href="#">Cancel</a>
<a href="#">View</a>	<a href="#">Download</a>	05-17-2024, 11:26:56 AM	8821	PDF					

12. A Tax TranscriptX order can also be requested from the applicant screen on the left-hand side.



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

05/17/2024