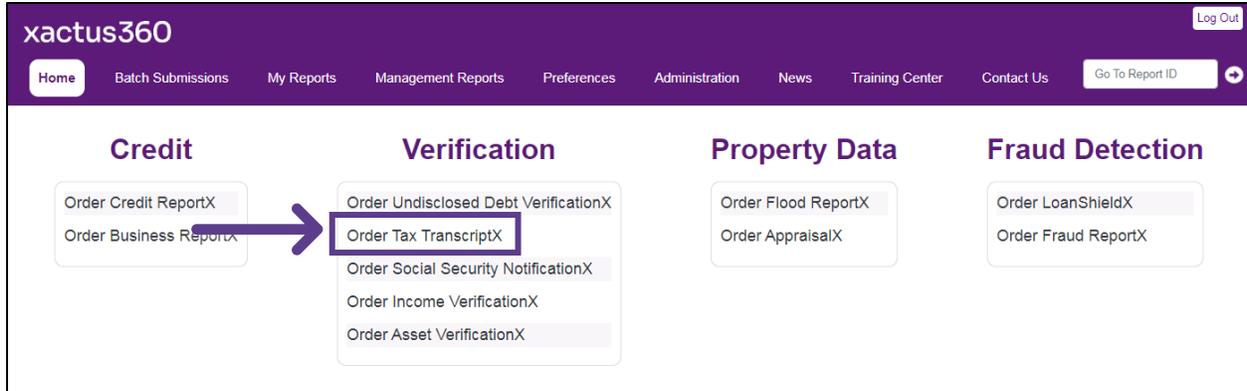


1. Start by logging into Xactus360 and from the home page, click Order Tax TranscriptX.



2. Under 'Transcript Type' choose Personal or Business. Then, complete all fields for the order including Name, Current Address, Transcript requested, which Form is needed, etc.

The screenshot shows the 'Order Tax TranscriptX' form. At the top left, the 'Transcript Type' dropdown menu is set to 'Personal Transcripts' and is highlighted with a purple arrow. Below this is a 'Loan Number/ID' input field. The main form area is divided into several sections:

- 1a Name shown on tax return. If a joint return, enter the name shown first.** This section has four input fields for First, Middle, Last, and Suffix.
- 1b First social security number on tax return** This section has one input field for the social security number.
- 2a If a joint return, enter spouse's name shown on tax return** This section has four input fields for First, Middle, Last, and Suffix.
- 2b Second social security number if joint tax return** This section has one input field for the social security number.
- 3a Current address (including apt., room, or suite no.), city, state, and ZIP code** This section has three input fields for Address, City, and State ZIP code.
- 3b Current name (if different from name in 1a)** This section has one input field for Name.
- 4 Previous address shown on the last return filed if different from line 3** This section has three input fields for Address, City, and State ZIP code.
- 6 Transcript requested.** This section has three radio button options: 'Return Transcript (Box A)', 'TRV - Personal Return (1040)', 'Account Transcript (Box B)', and 'Record of Account (Box C)'. The 'TRV - Personal Return (1040)' option is highlighted with a purple arrow.
- 7 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** This section has four radio button options: 'TRV - W2', 'TRV - 1099', 'TRV - 1098', and 'TRV - 5498'. The 'TRV - 1099' option is highlighted with a purple arrow.

3. Check the box(es) next to the years requested, select whether an E-Signature is being used, Upload the 4506-C and Completion Certificate if E-Signed.

8 Year or period requested.
 2021 2020 2019 2018

Telephone number of taxpayer on line 1a or 2a

E-signature(s):
 Use E-Signature

Email address:

Upload 4506-C:

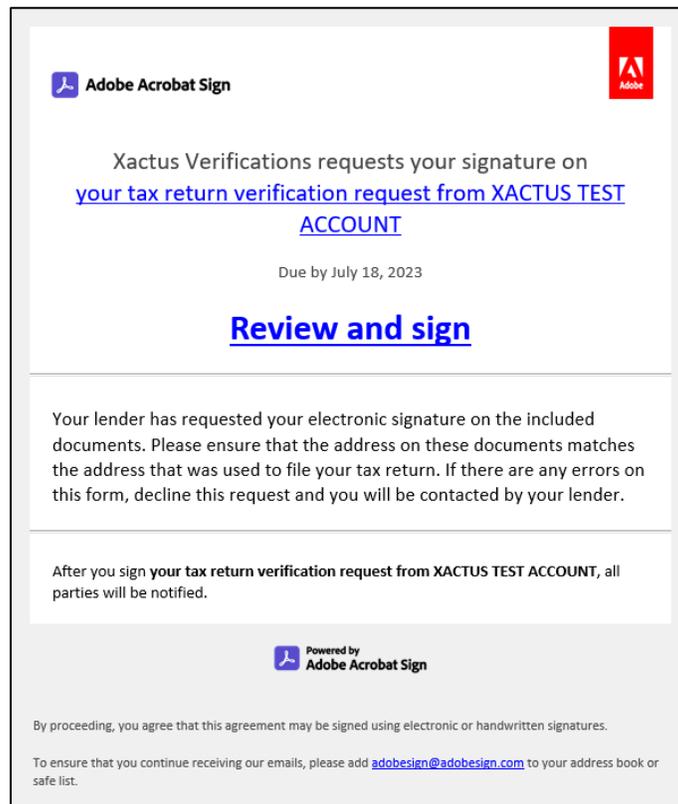
4506:
 No file chosen

IRS POA form 2848, 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).

Completion Certificate:
 No file chosen

A Completion Certification (e-sign audit log) is required on all requests containing an e-signed 4506. If your Completion Certificate was not included with the selected 4506, please provide the separate document here. Any request with an e-signed 4506 received without a Completion Certificate will be rejected.

4. If an E-Signature is being used, an email will be sent to the consumer to review and sign the 4506C electronically. There is no need to upload an 4506C document when the E-Signature is used. The email to the consumer looks like this:



5. If you wish to pay by credit card, please fill in this information as well.

Credit Card Information:

I authorize the use of the card below to pay for this order
 Don't pay for this order by credit card

First Name Last Name

Company

Address

City State Zip

Card Type
Visa

Card Number

Expiration Date
October (10) 2022

Save as default
NO

6. Ensure the correct email address is listed for the Notification and enter a secondary email if needed. When all is complete, click Submit.

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:

7. This can also be requested from the applicant screen on the left-hand side.

 Tax TranscriptX [Order](#)

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