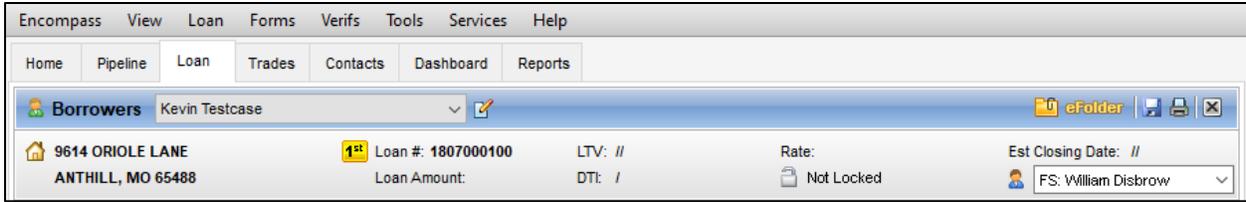
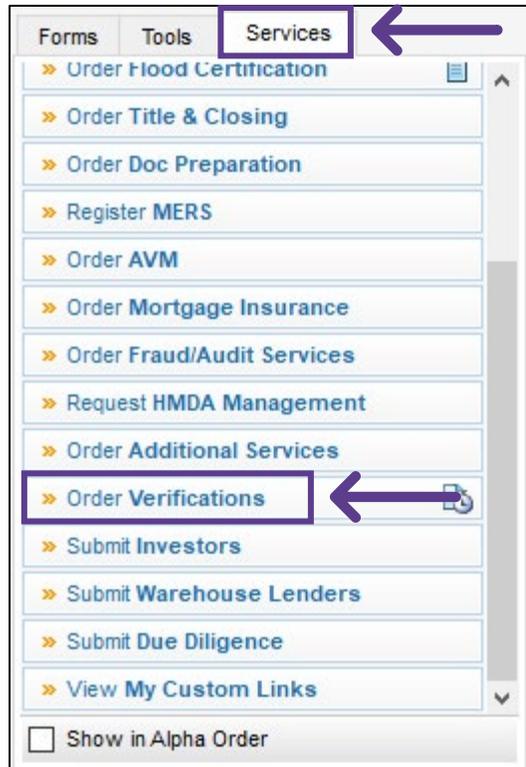


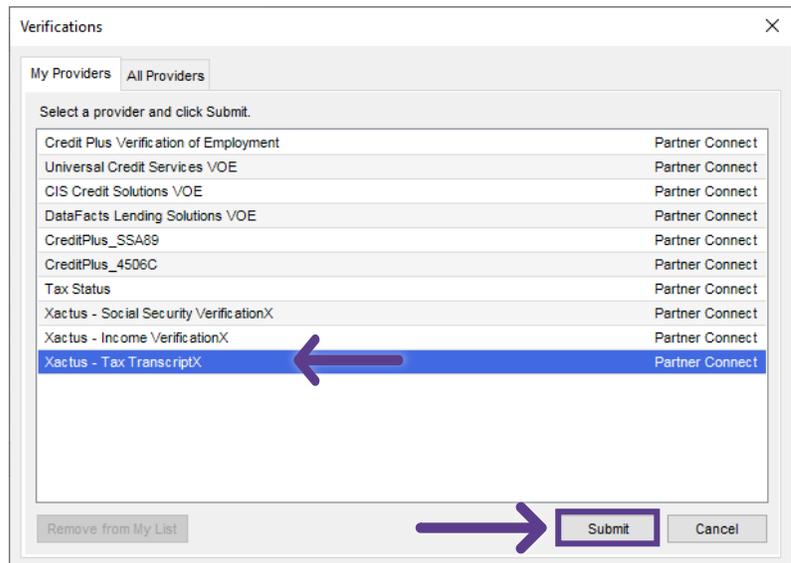
1. Start by logging in and opening the applicants loan file.



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



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



- 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: Nickle Green | First Name: Nickle | 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

2c. 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: Nickle Green | First Name: Nickle | 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: |

- 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

- 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 *

4506-C.pdf


 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)

Completion Certificate


 Drag and drop file here or click

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 Send Notification To Secondary E-mail Notification Address



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



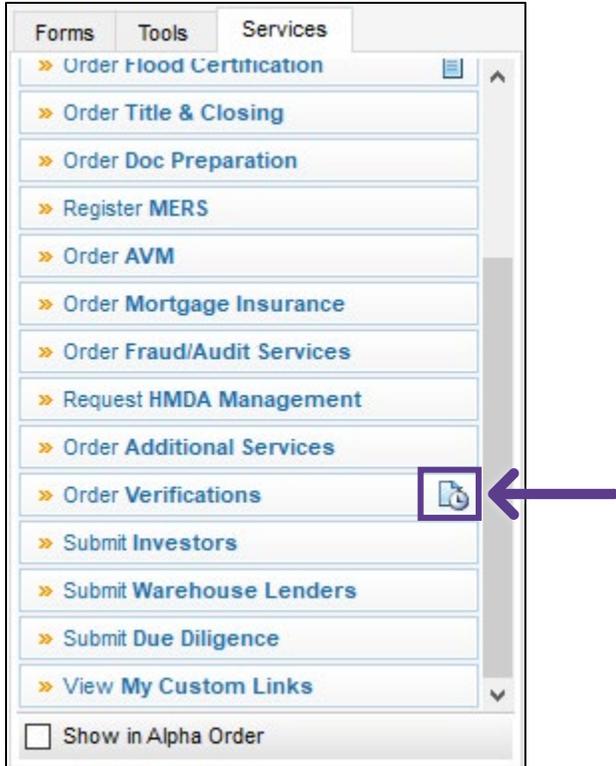

Tax TranscriptX

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.

The screenshot shows a window titled "Services" with a table of service providers. The table has columns: Att, Name, Requested From, For Borrower Pair, Status, and Date. The third row is highlighted in blue. Below the table, there are three buttons: "Retrieve", "New Document", and "Cancel". A purple arrow points to the "Retrieve" button.

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

*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.

The screenshot shows the "Encompass eFolder" window. It has a menu bar with "eFolder", "Documents", and "Help". Below the menu bar, there are tabs for "Documents", "Preliminary Conditions", "Underwriting Conditions", "Post-Closing Conditions", "Delivery Conditions", "Packages", and "History". The "Documents" tab is active. Below the tabs, there is a "Documents View" section with a "Standard View" dropdown. Below that, there is a "Document Group" dropdown set to "(All Documents)" and a "Stacking Order" dropdown set to "None". Below that, there is a "Documents (20)" section with a table of documents. The table has columns: Att, Fo, Name, Description, For Borrower Pair, Type, Access, For Milestone, Status, and Date. The first row is highlighted in yellow.

Att	Fo	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.