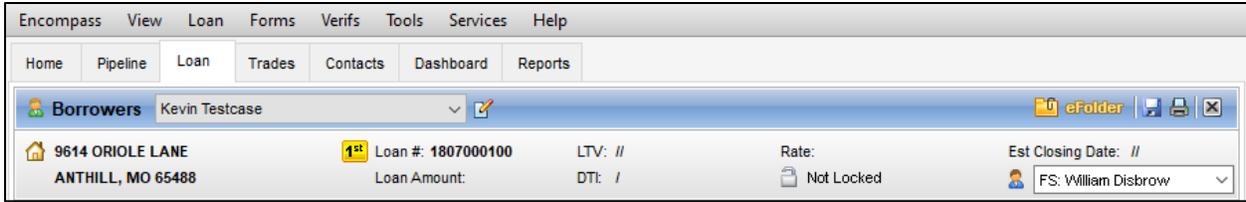
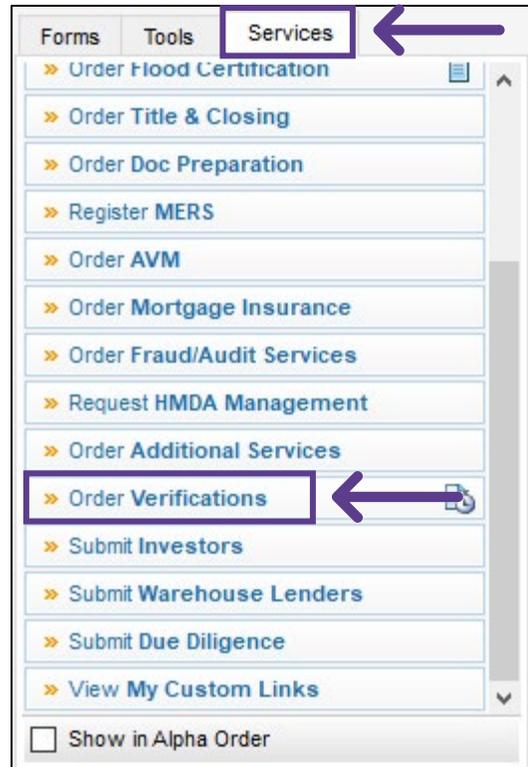


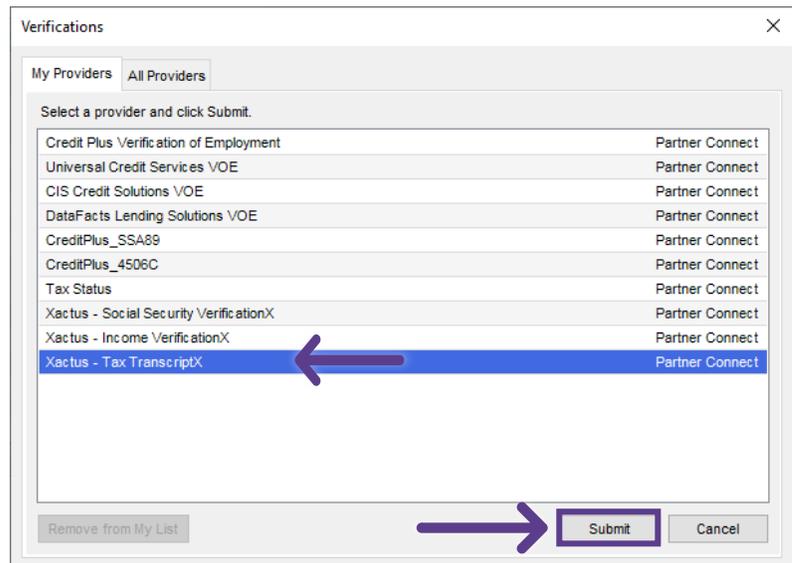
1. Start by logging in and opening the applicants loan file.



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.



3. Start by choosing TTX (Form 8821) and the Transcript Type. Your applicant information will pre-populate from the 1003.

The screenshot shows the Xactus Tax TranscriptX interface. At the top left is the Xactus logo with the tagline "Advancing the Modern Mortgage". To its right is the "TTX Tax TranscriptX" header. In the top right corner, it says "Operator ID: xactus.demo" with a "Switch Operator ID" link. The main form area has a "Form Type" dropdown menu set to "TTX (Form 8821/Halcyon)". Below this is a "Loan Number" field with "2409000212" and a "Transcript Type" dropdown menu set to "Personal Transcripts". To the right of the transcript type is a "Borrower has IRS Account" dropdown menu set to "No". The "Borrower" section includes a "Borrower" dropdown menu set to "Nickie Green", and fields for "First" (Nickie), "Last" (Green), "SSN/TIN" (123-00-3333), and "Email Address" (xactus@xactus.com). The "Address on Last Filed Tax Return" section includes fields for "Address Line 1" (100 TERRACE AV), "Address Line 2", "City" (West Haven), "State" (CT), and "Zip" (06516). Purple arrows point to the "Form Type" dropdown, the "Transcript Type" dropdown, and the "Borrower" dropdown.

4. If the loan file is joint and you need to order for only one borrower, click the drop-down arrow next to the borrower's name and select which borrower is needed.

This screenshot shows a close-up of the "Borrower" dropdown menu. The menu is open, showing "Nickie Green" as the selected option and "Alan Brown" as an alternative. The rest of the form fields (First, Last, SSN/TIN, Email Address, Address, City, State, Zip) are visible in the background. A purple arrow points to the dropdown arrow next to the "Borrower" field.

5. Select the Form needed as well as the Available Years.

This screenshot shows two side-by-side selection panels. The left panel, titled "Form Types*", has a list of options: "1040 - Return Transcript" (checked), "1040 - Record Account", "W-2 Employees Earnings", "1099 - Self-Employed Earnings", and "All Income Data". The right panel, titled "Available Years*", has a list of years: "2023" (checked), "2022", "2021", and "2020". Purple arrows point to the "Form Types" and "Available Years" headers.

6. Next, upload the 8821 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 Documents

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

Drag and drop file or click here

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).

Send Status and Notification to :

Primary Email
xactus@xactus.com

Secondary Email

Submit

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

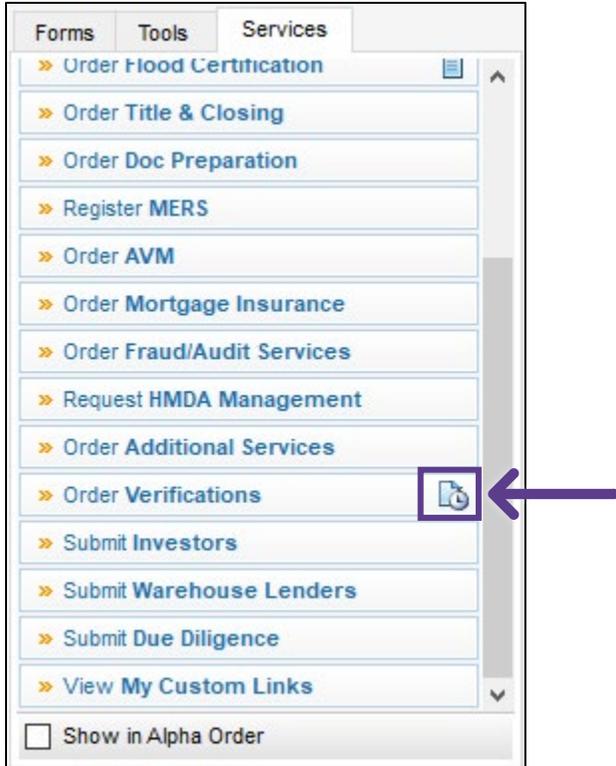
xactus | Tax TranscriptX

Advancing the Modern Mortgage

Borrower	
Name	NICKIE GREEN
SSN	123-00-3333
Address	100 TERRACE AV West Haven, CT 06516

Order Details	
Report ID	66388684
Loan Number	2409000212
Ordered By	Xactus Demo
Status	New
Ordered	11/06/2024 12:39:12 PM
Transcript Type	1040 - Return Transcript
Requested Year(s)	2023

8. After receiving the Completion email, 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 close button (X) in the top right corner. Below the title bar is a section labeled "From Service Providers" containing a table with the following columns: Att, Name, Requested From, For Borrower Pair, Status, and Date. The table contains five rows of data, with the third row highlighted in blue. At the bottom right of the window, there are three buttons: "Retrieve", "New Document", and "Cancel". A purple box highlights the "Retrieve" button, and a purple arrow points to it from the right.

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" interface. At the top, there are tabs for "Documents", "Preliminary Conditions", "Underwriting Conditions", "Post-Closing Conditions", "Delivery Conditions", "Packages", and "History". Below the tabs is a "Documents View" section with a "Standard View" dropdown and icons for refresh, home, and search. Underneath, there are dropdowns for "Document Group" (set to "All Documents") and "Stacking Order" (set to "None"). The main area displays a list of documents with the following columns: Att, Fo, Name, Description, For Borrower Pair, Type, Access, For Milestone, Status, and Date. Two documents are listed: "2 Tax TranscriptX (494266)" and "1 Verifications". The "Tax TranscriptX" document 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.