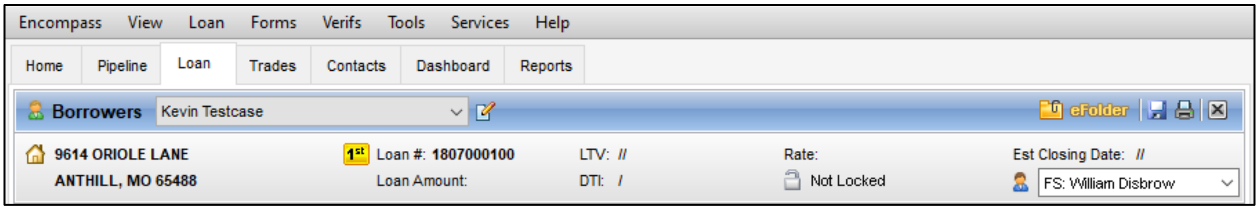
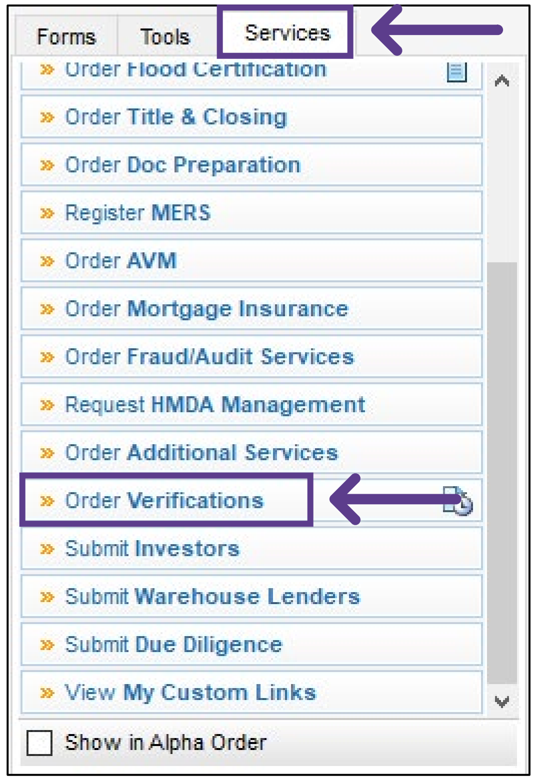
xactus
Advancing the Modern Mortgage

How to Order Tax TranscriptsX (Form 8821) Within Encompass® by ICE Mortgage Technology® (Xactus360)

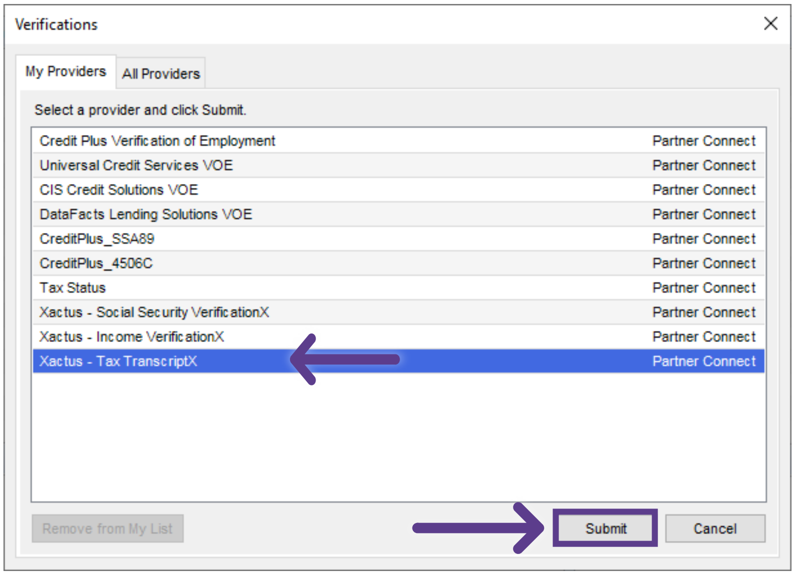
1. Start by logging in and opening the applicants loan file.



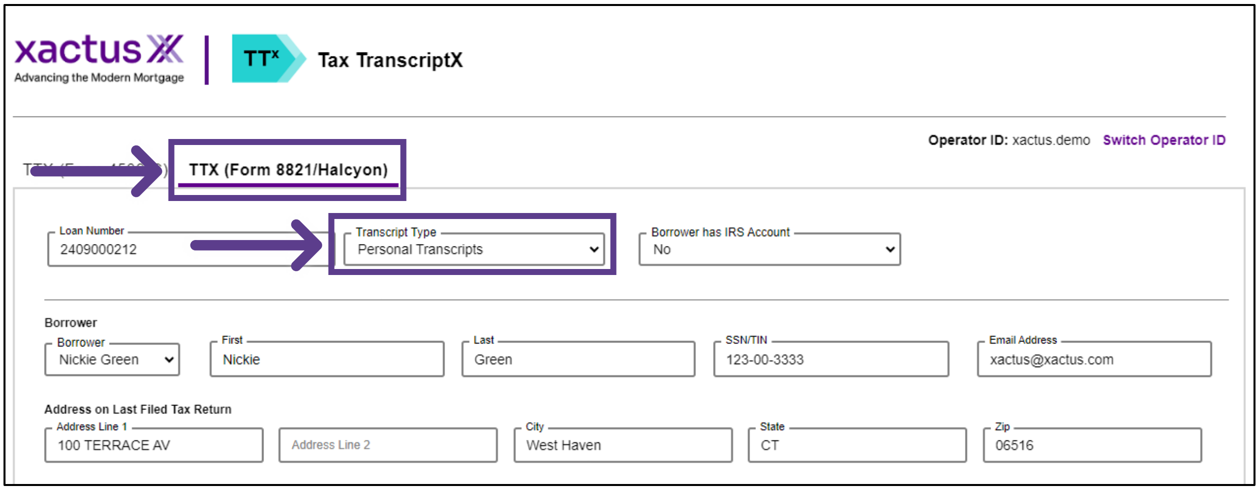
2. Click on the Services tab in the bottom left corner. Select Order Verifications.



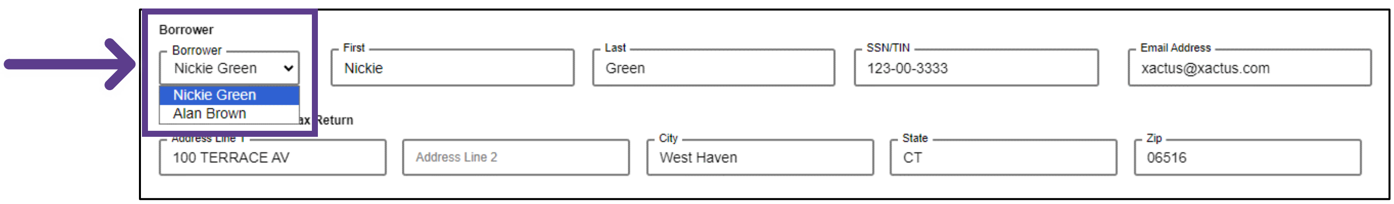
A window will pop-up allowing you to choose your Provider. Then, click Submit to launch the order form.



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

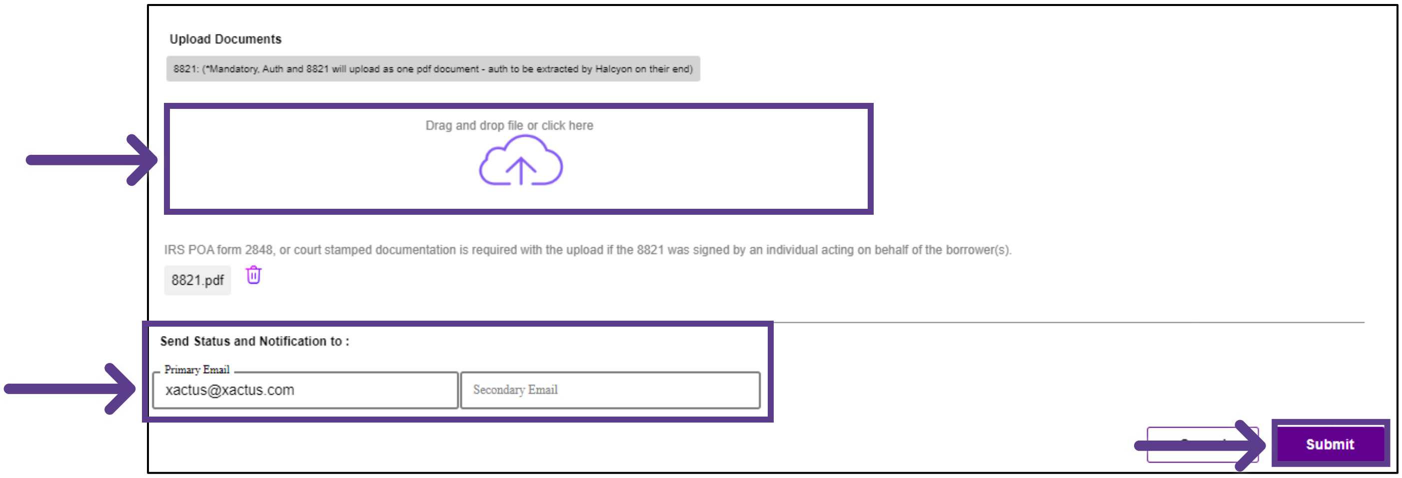


4. If the loan file is joint and you need to order for only one borrower, click the drop-down arrow next to the borrower's name and select which borrower is needed.

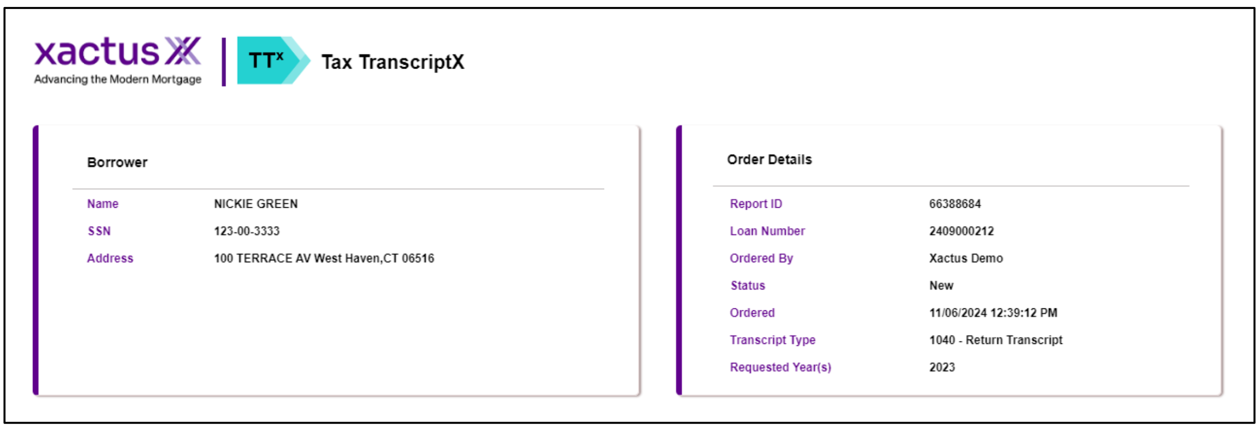


5. Select the Form needed as well as the Available Years.

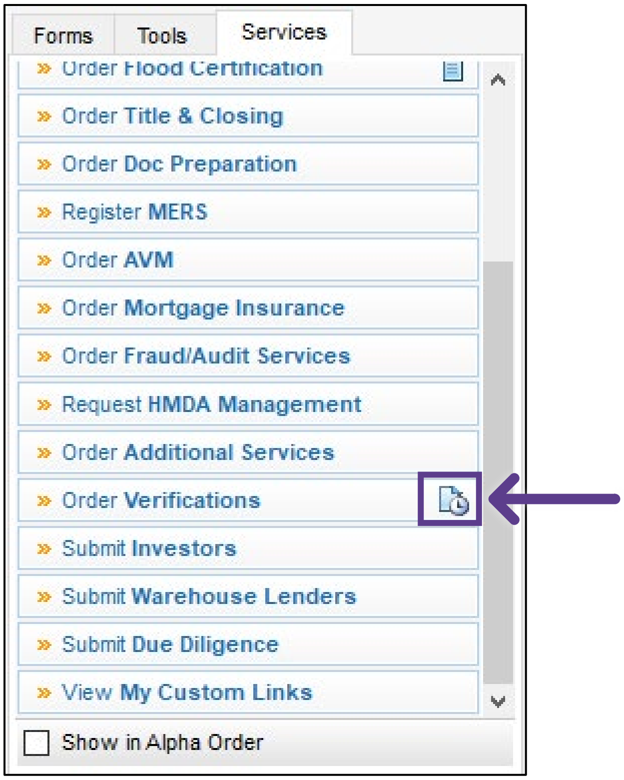
6. Next, upload the 8821 from the EFolder or local drive. Include a Completion Certificate for an e-signed order if applicable. Ensure the correct email address is entered to be notified when the order is complete. When all is complete, click Submit.



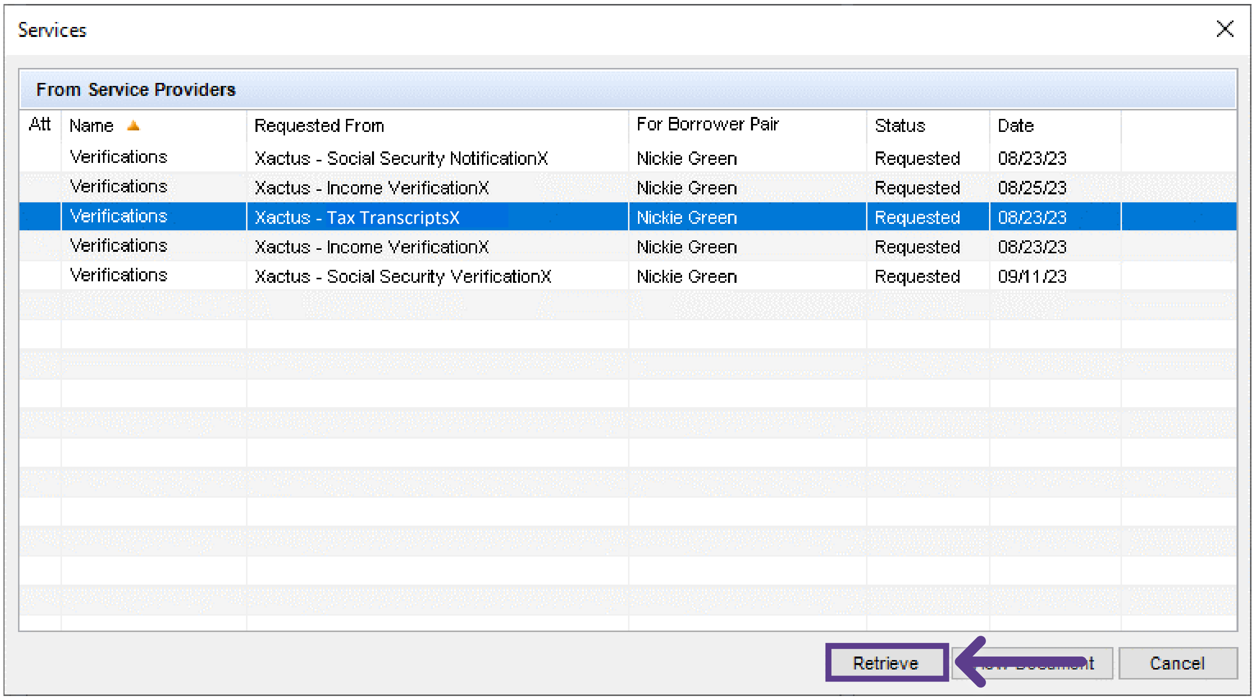
7. The order has been submitted and an email will be sent to you when complete.



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.



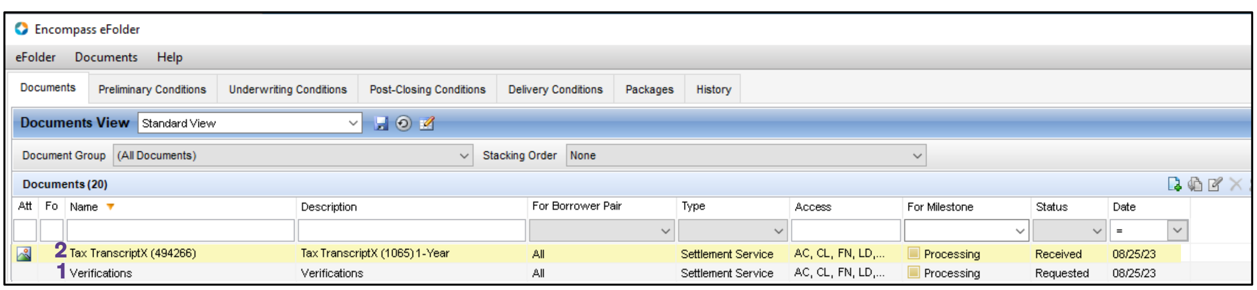
9. Click the order needed and click Retrieve.



*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.



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