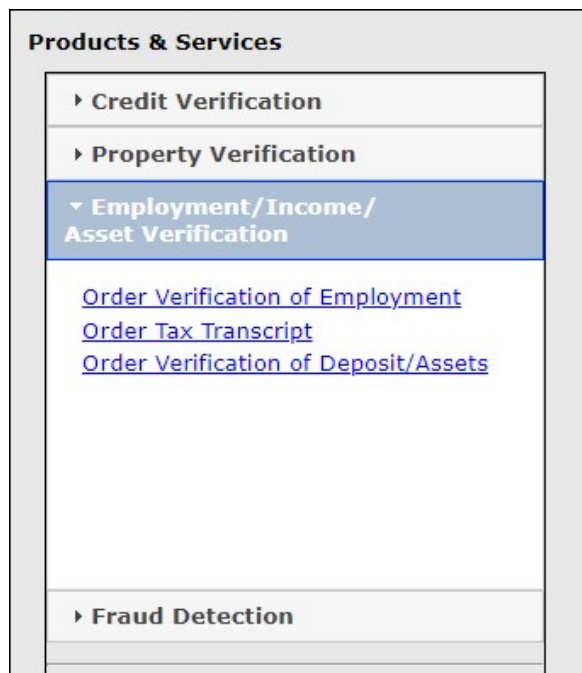# How to order a Tax Transcript Request

To get to the tax transcript request ordering page:

1. under *Products & Services* section
2. click on *Employment/ Income/ Asset Verification*
3. click on *Order Tax Transcript* link

Tax Transcript Order Page

1. **Fill-out the following consumer information on the order page.**
   Fields designated with the green letter R are required.
   - Loan Identifier
   - Name or Business name
   - SSN/EIN
   - Full Address under Current Address
2. **Using the dropdowns, select at least 1 tax form and transcript type, and years requested.**
   The available Tax Forms that can be ordered are:
   - 1040 - The form that individuals use to disclose their annual income for the year.
   - W2 - The form that an employer must send to the employee and the IRS at the end of the year which discloses the employee's annual wages and the amount of taxes withheld from their paycheck.
   - 1099 - The form that businesses provide to the independent contractors and the IRS at the end of the year which discloses the non-employee's annual wages.
   - 1120 - The form that corporations use to disclose their annual earnings for the year.
   - 1065 - The form that partnerships use to disclose their annual earnings for the year.
3. **Click the *Add Transcript link* to add additional transcripts to the order.**
   Each transcript will place a transcript order.
   - You may add up to 4 transcripts orders.
   - Click the red X to remove transcripts from the order.
4. **Select one of the two delivery methods.** You need to upload a signed 4506-C form in PDF format.
5. **Click on the *Order* button to place the tax transcript order.** If you get any warnings, please correct them and try to order again. You may get a warning screen indicating that a tax transcript request order already exists for the consumer. *Please see the Duplicate Detection section for more details.*

Tax Transcript

Cancel

Order for ABC MORTGAGE TEST(#MCL0017) - TESTER

Loan Identifier   Notification Email ⑦

Taxpayer Information

⦿ Personal   ◯ Business

First Name 🟢🔴   Last Name 🟢🔴   SSN🟢🔴

Spouse's First Name   Spouse's Last Name   Spouse's SSN

Current Address
Full Address🟢🔴⑦   more detail

Previous Address (shown on last tax return, if different from above) ⑦
Full Address⑦   more detail

Order Detail

Tax Forms 🟢⑦   Transcript Type 🟢⑦   Year(s) Requested 🟢

1. 1040 - Prima ⌄   6a - Return Transcript   ⌄   ☑ 2020 ☑ 2019 ☐ 2018 ☐ 2017
   Add Transcript

4506-C Delivery Method 🟢 ⑦

◯ Use the uploaded 4506-C from previous order. view
⦿ Please upload the signed 4506-C form.
   Document was electronically signed? 🟢
   ◯ Yes
   ◯ No
   4506-C (PDF or TIFF file smaller than 2MB)
   [Choose File] No file chosen

Additional Fields

Delivery Methods

We support the following delivery methods:

- **Uploading a PDF**. This allows the user to upload a PDF 4506-C form.
- **Uploading a PDF and marking it as an electronically signed 4506-C.** Due to IRS auditing requirements, the user is required to upload an electronically signed certificate, along with the 4506-C form.

For e-signed tax transcript request, please complete the following:

1. **Select whether the *Document was electronically signed* checkbox.** This will indicate if the order is e-signed (or not) so the order can be processed correctly.
2. **If the e-sign certificate and 4506-C form are combined in one PDF, upload it using the *4506-C* upload field.**
3. **If the e-sign certificate and 4506-C form are in separate PDF documents, upload the 4506-C form using the *4506-C* upload field and upload the e-signed certificate using the *E-Sign Audit Log* upload field.** This will help ensure your order does not get cancelled.

4506-C Delivery Method Ⓡ ❓

Please upload the signed 4506-C form.
Document was electronically signed? Ⓡ
○ Yes
○ No
4506-C (PDF or TIFF file smaller than 2MB)
[Choose File] No file chosen

4506-C Delivery Method Ⓡ ❓

Please upload the signed 4506-C form.
Document was electronically signed? Ⓡ
◉ Yes
○ No
4506-C (PDF or TIFF file smaller than 2MB)
[Choose File] No file chosen
E-Sign Audit Log (PDF or TIFF file smaller than 10MB)
[Choose File] No file chosen

Tax Transcript Order Information Page

After a tax transcript request has been successfully ordered, you will be taken to the **Tax Transcript Verification Order Info** page.

Tax Transcript Order Info

File #:	2239		View Uploaded 4506-C
Status:	Completed		View Transcript
Reference #:			Create New Order
Notification Email:			
Applicant:	JONATHAN TESTCASE - *****0001		
Co-Applicant:			
Tax Form:	1040		
Address:			
Transcript:	6a - Return Transcript		
Tax Year(s):	2020		
Price:	$0.00		
Ordered From:	WEBSITE		

Internal Notes: (Any changes must be saved)   Access History ❓

Status History:

Date	Status	User	Message
01/29/21 08:10 AM	Completed	P:FRANKLIN KAMURAN	
01/29/21 08:09 AM	Submitted	P:FRANKLIN KAMURAN	4506-C form received by Tax Transcript provider.
01/29/21 08:09 AM	New	P:FRANKLIN KAMURAN	Initiated or Resubmitted an order.
01/29/21 08:09 AM	New	P:FRANKLIN KAMURAN	New Order entered into System

Charges:

Date	Description	Credit	Charge
	(No charges)		

[Save] [Return]

Order Information

The information that was used to order the tax transcript will appear on the top left section of the order screen. The top right section contains links to View Uploaded 4506-C and to View eSignature Certificate documents attached to the order. When an order is Complete, it will contain links to View Transcript and Create New Order.

Status History

The Status History will contain changes and updates made to an order.

Status History:		
Date	**Status**	**Message**
12/11/20 11:42 AM	Completed	Order completed
12/11/20 11:40 AM	New	New Order entered into System

Charges Field

Tax transcript requests are not charged until they are Complete.

The *Place another order* link will take you back to the tax transcript ordering page so you can place another order.
Please note: this link only appears on the ordering information page immediately after placing an order.
The link will not be there if you visit the order information page at a later time.

Click on the *Return* button to return to the Main screen.

Charges:			
Date	**Description**	**Credit**	**Charge**
(No charges)			

Place another order   Return

Other Tax Transcript Request Features

E-mail Notifications

An automated email alert will be sent when an order is placed, when there is an IRS Rejection, when an order has been Cancelled, and when the order is Complete.

The e-mails will be sent to the e-mail address entered in the Notification Email field on the order information page.

Duplicate Detection

Users placing any new order may receive a duplicate order alert, which can be bypassed when ordering via the website, but there is no option to prevent them from ordering a duplicate should they choose to ignore the warning.

Users cannot override duplicate detection via a LOS. If a user wishes to place a duplicate order, they must do so via the website.

Tax Transcript Income Summary

The Tax Transcript Income Summary contains important line items from the tax transcript results.

The Income Summary will only appear if the following criteria is met:

- Tax transcript order(s) must be for 1040 or W2 or 1099.
  Line items will vary depending on tax product ordered.
- 1040 Transcript type must be Return Transcript or Record of Account.

Below is a sample screenshot of the Income Summary:

Advantage Credit
Credit Reporting Services

Tax Transcript

Order Details			
Order Number:		Reference Number:	
Reissue Key:		Taxpayer:	
Ordered By:		Date Completed:	05/20/2021 07:59:53 AM
Date Ordered:	05/17/2021 07:17:32 AM	Tax Year(s) Ordered:	2020, 2019, 2018, 2017
Tax Form/Transcript:	1040 - 6c - Record of Account		

Tax Transcript Summary

	2017	2018	2019	2020
WAGES, SALARIES, TIPS, ETC	$77,283.00	$135,706.00	$118,604.00	$97,495.00
UNREIMBURSED EMPLOYEE EXPENSES (SCHEDULE A)	N/A	N/A	N/A	N/A
TAXABLE INTEREST INCOME (SCHEDULE B)	$0.00	$0.00	$0.00	$67.00
BUSINESS INCOME OR LOSS (SCHEDULE C)	$0.00	$0.00	$0.00	$0.00
CAPITAL GAIN OR LOSS (SCHEDULE D)	$0.00	$0.00	$329.00	$517.00
RENT/ROYALTY/PARTNERSHIP/ESTATE (SCHEDULE E)	$0.00	$0.00	$0.00	$0.00
TOTAL IRA DISTRIBUTIONS	$0.00	$0.00	$0.00	$0.00
TOTAL PENSIONS AND ANNUITIES	$0.00	N/A	$0.00	$0.00
TOTAL SOCIAL SECURITY BENEFITS	$0.00	$0.00	$0.00	$0.00
TOTAL INCOME	$77,283.00	$135,706.00	$118,933.00	$98,087.00
ADJUSTED GROSS INCOME	$76,891.00	$135,706.00	$118,933.00	$94,537.00

NOTE: Summary may not be complete. See tax transcripts for complete income information.

How to order a Tax Transcript Request within a Credit File

Once you have located the file you wish to order Tax Transcripts for, click on the file number link.

view	14595694		Credit	XP/TU/EF		SARAH TESTCASE *****0008		6/29/2020 8:23 AM

From within the credit file, click on **Tax Transcript** option listed on the lower right-side of the **Additional Products** menu.

The next screen will take you into the **Settlement Services Worksheet**, where you will click on the blue tab **Request New Service**

You will see a new box **Select Service to Order**:

Clicking on the **Order Tax Transcripts** link will take you into the **Tax Transcript** request page:

** **NOTE** – the address on this page must be a US address, but doesn't necessarily have to match that on the 4506-C; be sure to properly select the 4506-C delivery method and upload the required documentation; you will receive an email confirmation once the order has been created.