Ordering a TRV (4506-T)

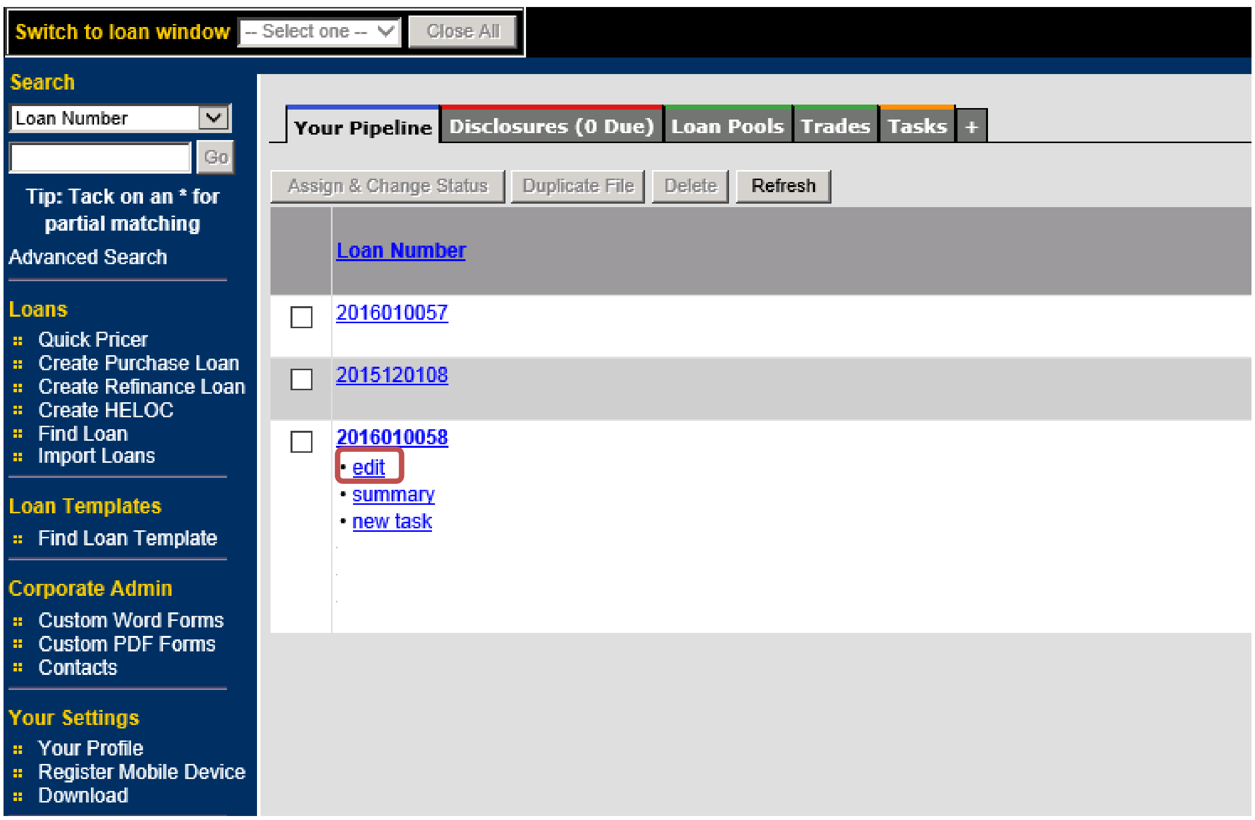
This document will show you how to order tax transcript requests TRV (4506-T through Lending QB two ways: Within the loan forms and through the Settlement Service Worksheet (SSW). Its purpose is not intended to provide detailed instructions on any other process.

Ordering Within Loan Forms

Step 1:

From the pipeline tab, select the loan in question. Several options will appear, CLICK the Edit link.

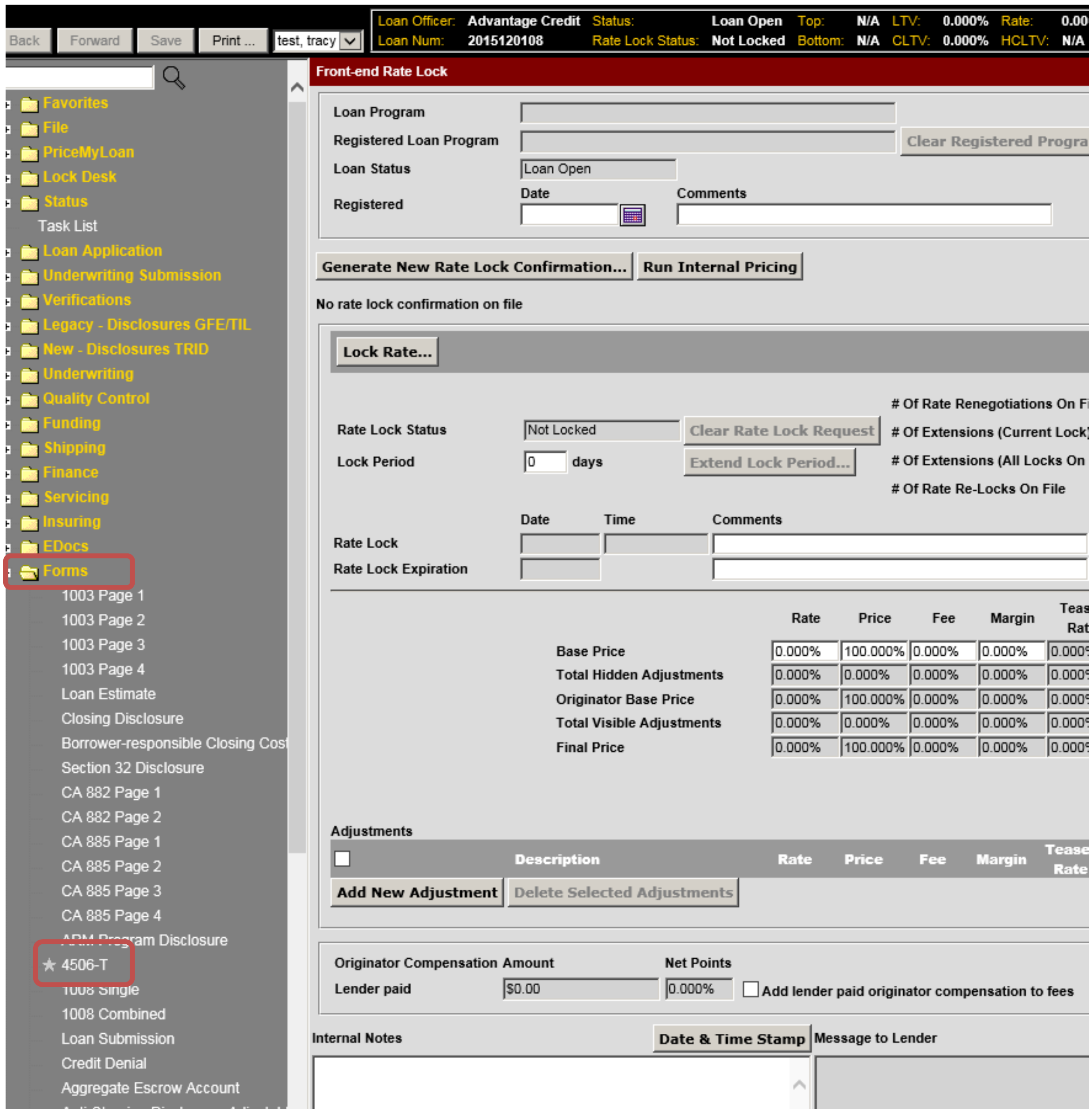
Example



<u>Step 2:</u>

From the left of the page, open the Forms folder and Select 4506-T option.

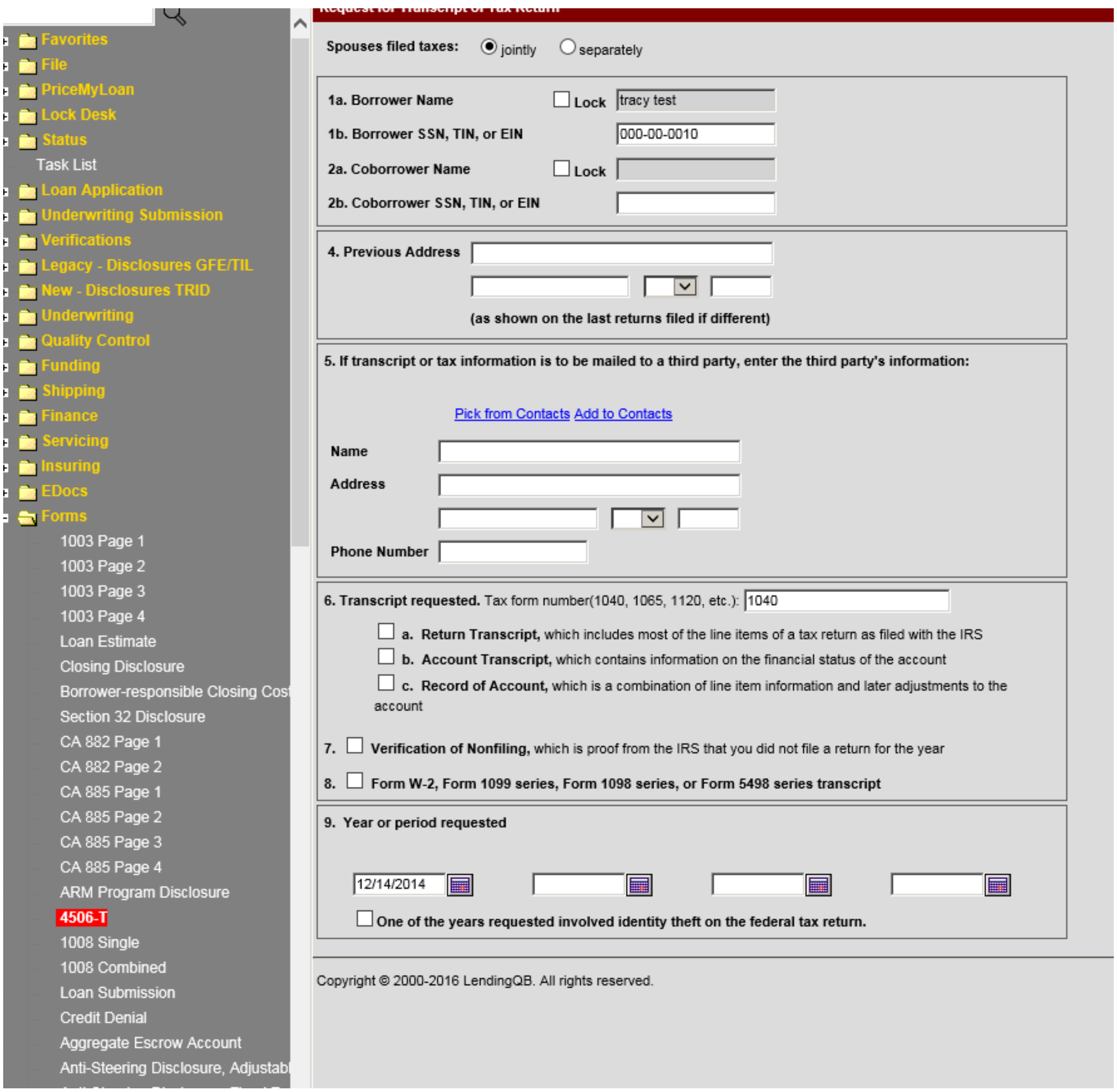
Example



Step 3:

The 4506-T form will appear. Complete all required fields and select appropriate items needed to be requested.

Example



Ordering from SSW

<u>Step 1:</u>

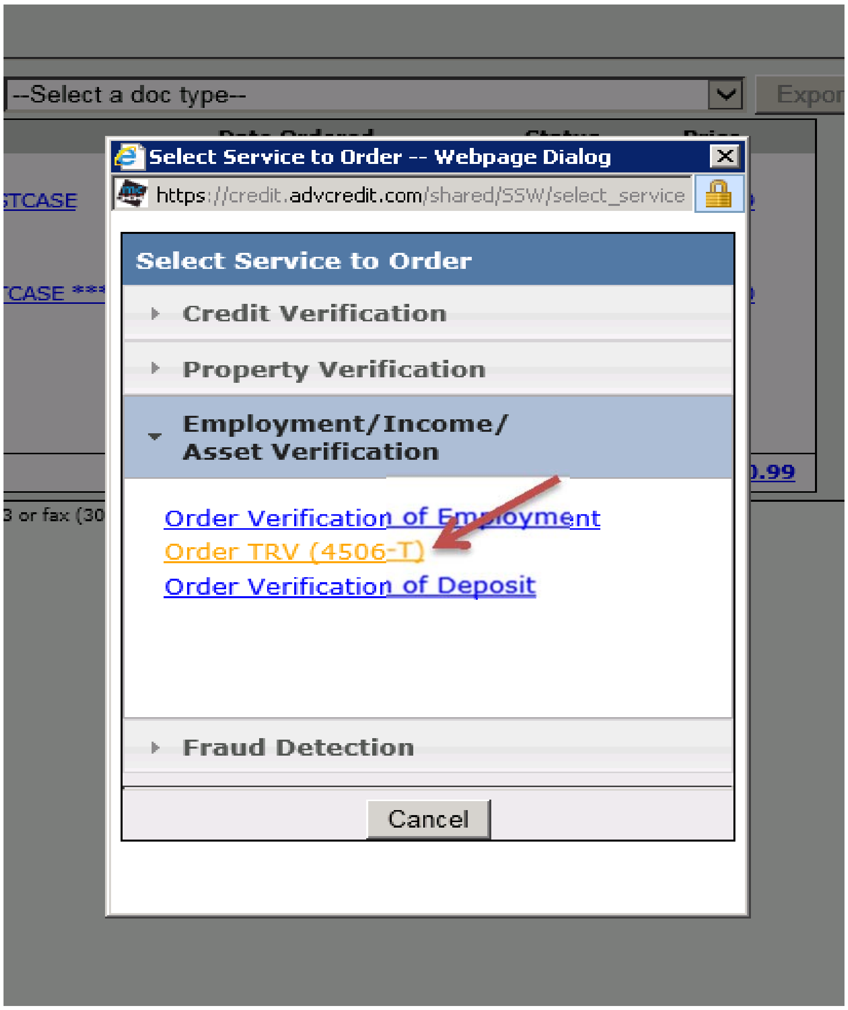
From the settlement service work sheet (SSW), CLICK Order New Product.

Example

Step 2:

A new window will appear and display the additional products that can be ordered. Under Employment/Income/Asset Verification section, CLICK Order TRV (4506-T).

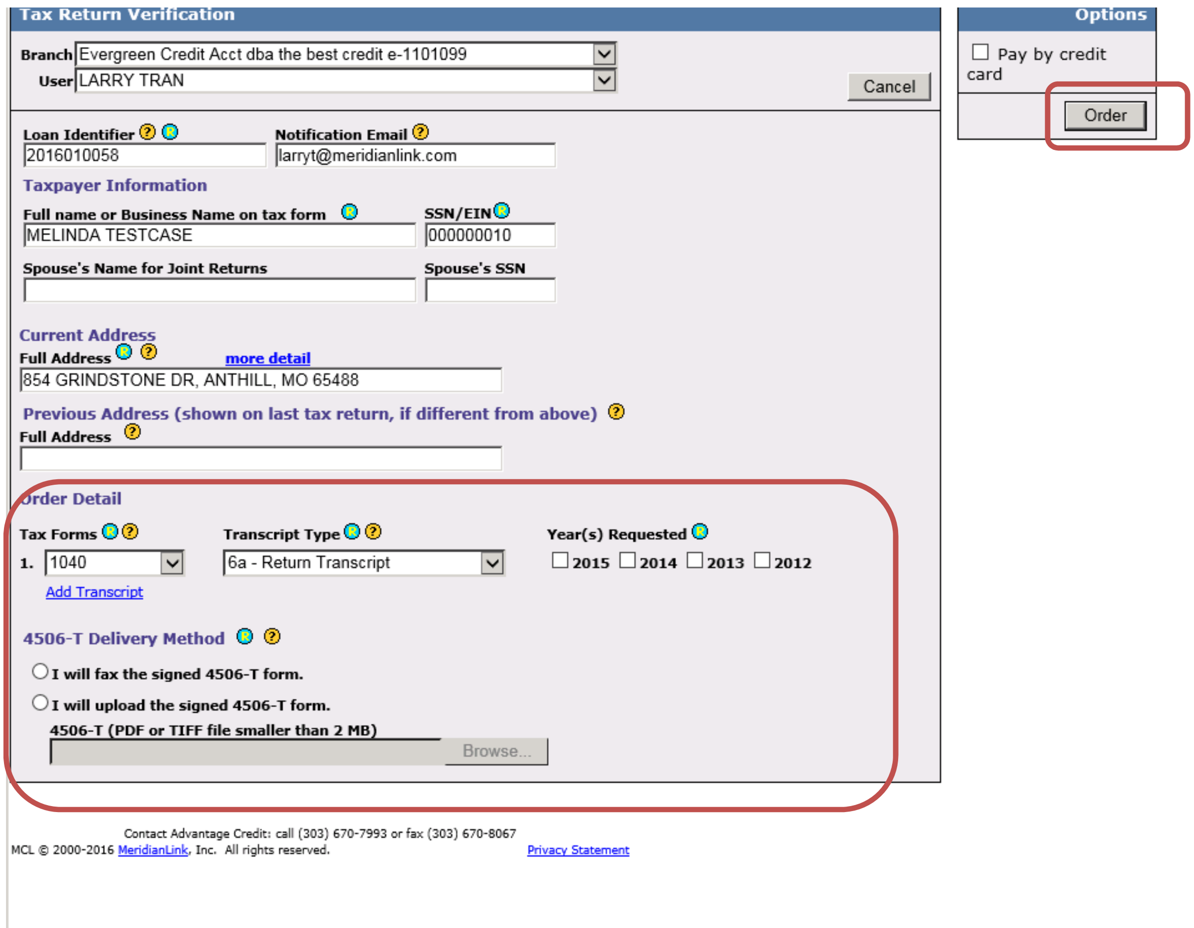
Example



Step 3:

A new window will appear. Complete all required fields and select appropriate details for the request. When completed CLICK Order button.

Example



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