

Ordering a TRV (4506-T)

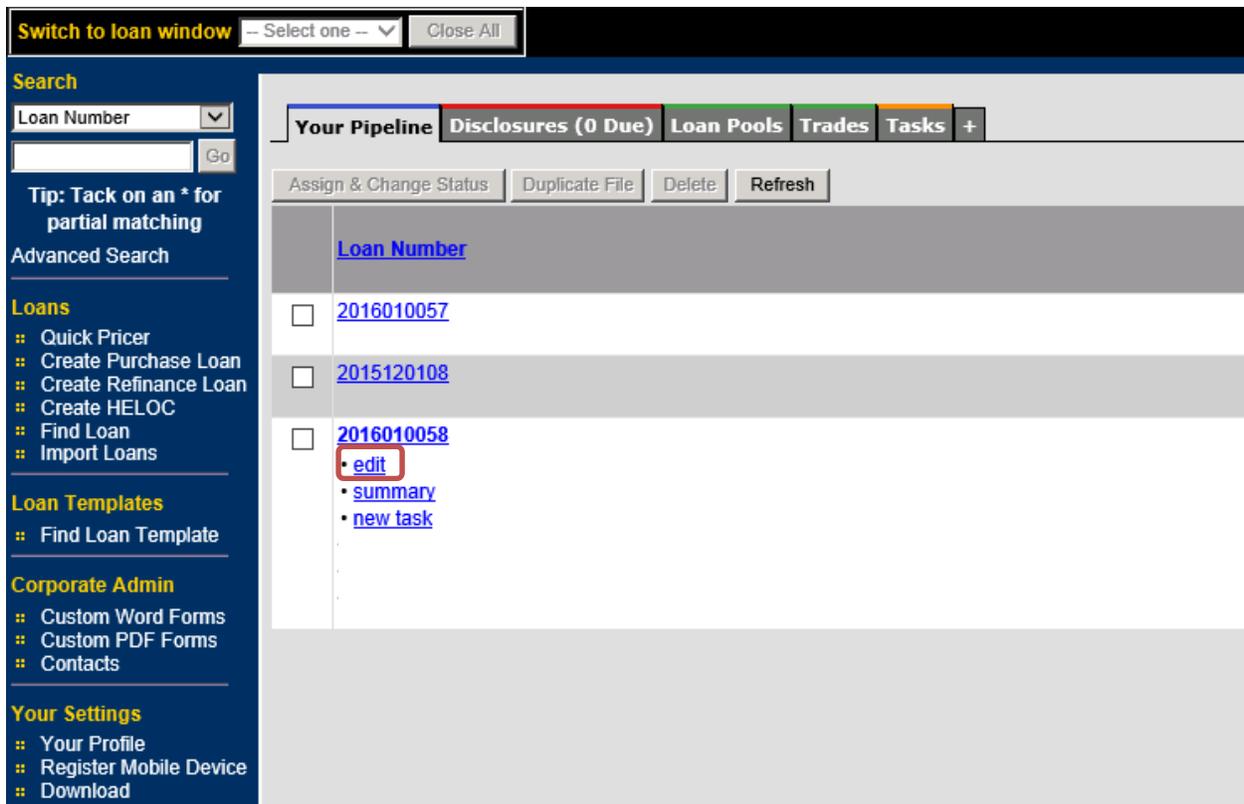
This document will show you how to order tax transcript requests TRV (4506-T through Lending QB two ways: Within the loan forms and through the Settlement Service Worksheet (SSW). Its purpose is not intended to provide detailed instructions on any other process.

Ordering Within Loan Forms

Step 1:

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

Example



The screenshot shows a web application interface. At the top, there is a navigation bar with a dropdown menu labeled "Switch to loan window" and a "Close All" button. Below this is a search section with a "Loan Number" dropdown and a "Go" button. A tip reads: "Tip: Tack on an * for partial matching".

The main content area is titled "Your Pipeline" and contains several tabs: "Your Pipeline", "Disclosures (0 Due)", "Loan Pools", "Trades", and "Tasks". Below the tabs are buttons for "Assign & Change Status", "Duplicate File", "Delete", and "Refresh".

A table lists three loans:

| | Loan Number |
|--------------------------|--|
| <input type="checkbox"/> | 2016010057 |
| <input type="checkbox"/> | 2015120108 |
| <input type="checkbox"/> | 2016010058 <ul style="list-style-type: none">editsummarynew task |

Step 2:

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

Example

Back Forward Save Print ... test, tracy

Loan Officer: Advantage Credit Status: Loan Open Top: N/A LTV: 0.000% Rate: 0.00
 Loan Num: 2015120108 Rate Lock Status: Not Locked Bottom: N/A CLTV: 0.000% HCLTV: N/A

Front-end Rate Lock

Loan Program
 Registered Loan Program Clear Registered Program
 Loan Status
 Registered Date Comments

Generate New Rate Lock Confirmation... Run Internal Pricing

No rate lock confirmation on file

Lock Rate...

Rate Lock Status Clear Rate Lock Request # Of Rate Renegotiations On File
 Lock Period days Extend Lock Period... # Of Extensions (Current Lock)
 # Of Extensions (All Locks On File)
 # Of Rate Re-Locks On File

| Rate Lock | Date | Time | Comments |
|----------------------|------|------|----------|
| Rate Lock Expiration | | | |

| | Rate | Price | Fee | Margin | Teas Rate |
|---------------------------|--------|----------|--------|--------|--------------|
| Base Price | 0.000% | 100.000% | 0.000% | 0.000% | 0.000% |
| Total Hidden Adjustments | 0.000% | 0.000% | 0.000% | 0.000% | 0.000% |
| Originator Base Price | 0.000% | 100.000% | 0.000% | 0.000% | 0.000% |
| Total Visible Adjustments | 0.000% | 0.000% | 0.000% | 0.000% | 0.000% |
| Final Price | 0.000% | 100.000% | 0.000% | 0.000% | 0.000% |

Adjustments

| Description | Rate | Price | Fee | Margin | Teas Rate |
|--------------------------|------|-------|-----|--------|--------------|
| <input type="checkbox"/> | | | | | |

Add New Adjustment Delete Selected Adjustments

Originator Compensation Amount Net Points
 Lender paid \$0.00 0.000% Add lender paid originator compensation to fees

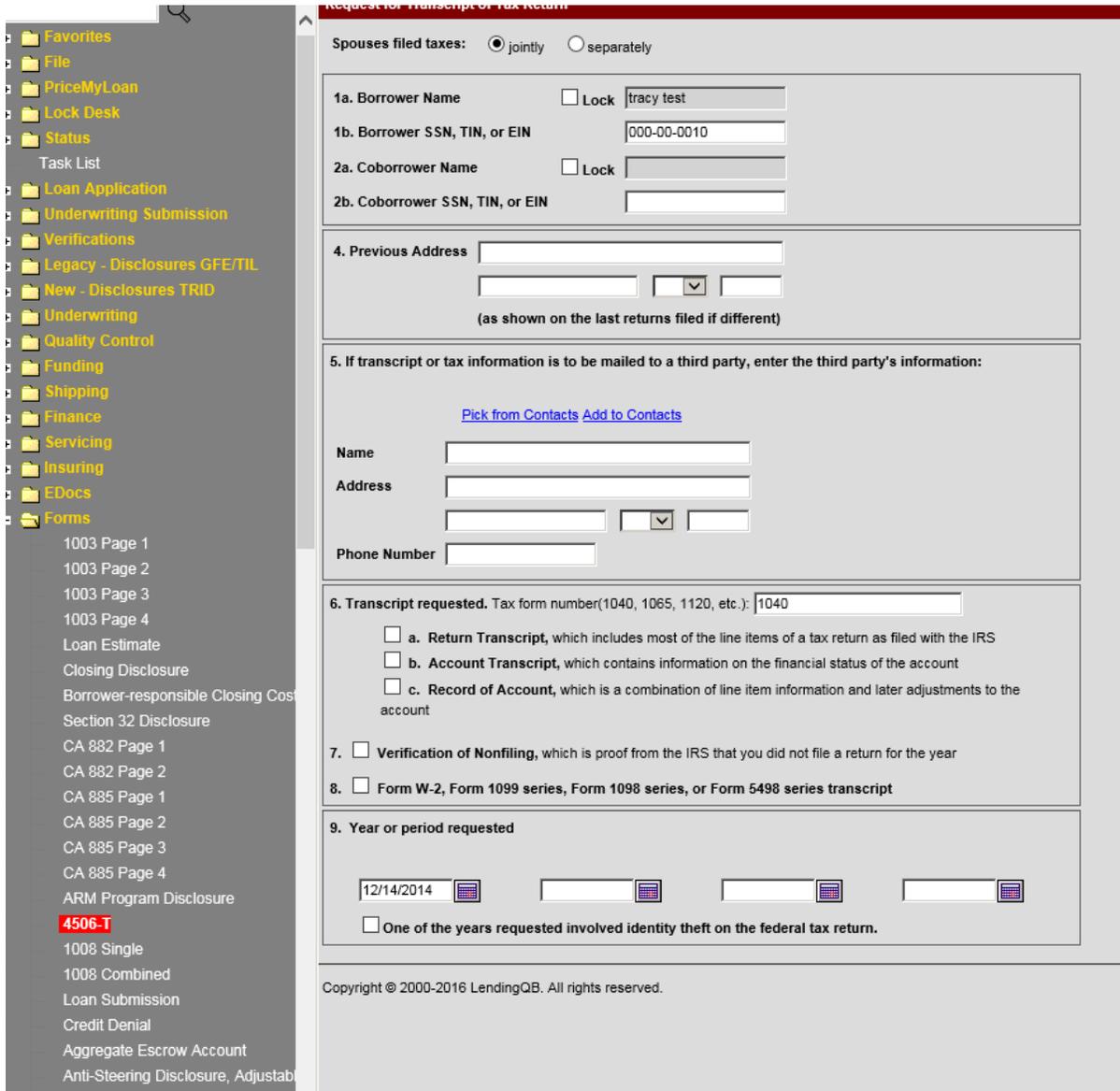
Internal Notes Date & Time Stamp Message to Lender

1003 Page 1
 1003 Page 2
 1003 Page 3
 1003 Page 4
 Loan Estimate
 Closing Disclosure
 Borrower-responsible Closing Cost
 Section 32 Disclosure
 CA 882 Page 1
 CA 882 Page 2
 CA 885 Page 1
 CA 885 Page 2
 CA 885 Page 3
 CA 885 Page 4
 ADM Program Disclosure
 ★ 4506-T
 1008 Single
 1008 Combined
 Loan Submission
 Credit Denial
 Aggregate Escrow Account

Step 3:

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

Example



Request for Transcript of Tax Return

Spouses filed taxes: jointly separately

1a. Borrower Name Lock

1b. Borrower SSN, TIN, or EIN

2a. Coborrower Name Lock

2b. Coborrower SSN, TIN, or EIN

4. Previous Address

 (as shown on the last returns filed if different)

5. If transcript or tax information is to be mailed to a third party, enter the third party's information:

[Pick from Contacts](#) [Add to Contacts](#)

Name

Address

Phone Number

6. Transcript requested. Tax form number(1040, 1065, 1120, etc.):

a. Return Transcript, which includes most of the line items of a tax return as filed with the IRS

b. Account Transcript, which contains information on the financial status of the account

c. Record of Account, which is a combination of line item information and later adjustments to the account

7. Verification of Nonfiling, which is proof from the IRS that you did not file a return for the year

8. Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript

9. Year or period requested

One of the years requested involved identity theft on the federal tax return.

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Ordering from SSW

Step 1:

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

Example

Edit
[Printer-friendly version](#)

Worksheet #: 63464 [Need to send to a lender?](#)

Loan #: 2016010058 **Address:** 854 GRINDSTONE DR, ANTHILL, MO 65488

Borrower: MELINDA TESTCASE **Property:**

Co-Borrower:

Order New Product

[Import Existing Product](#)

--Select a doc type--

Export to LOS

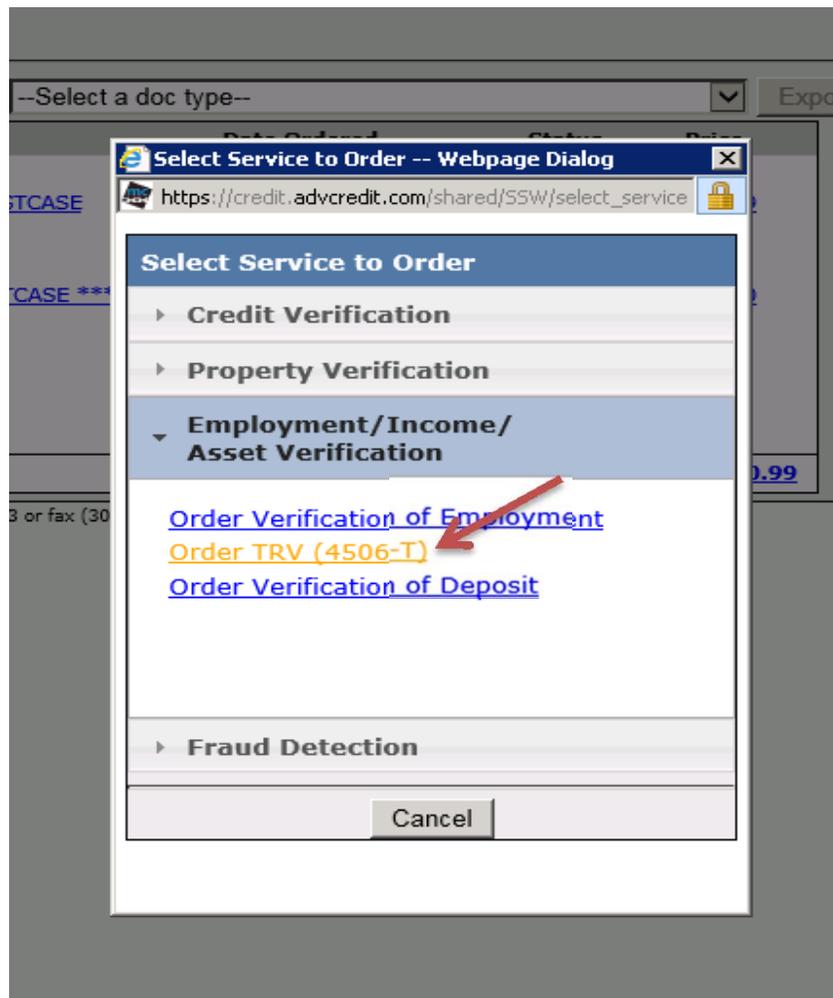
| <input type="checkbox"/> Service | Date Ordered | Status | Price |
|---|----------------------|-----------|------------------------|
| CREDIT REPORT | | | |
| <input type="checkbox"/> view remove 3122764: MELINDA TESTCASE | 01/14/16 03:34:10 PM | XP/TU/EF | \$0.99 |
| UNDISCLOSED DEBT NOTIFICATIONS | | | |
| IDENTITY VERIFICATION | | | |
| <input type="checkbox"/> view remove 247779: MELINDA TESTCASE *****0010 | 01/14/16 03:34:11 PM | INSTANTID | \$0.00 |
| FLOOD REPORT | | | |
| AVM REPORT | | | |
| TAX RETURN VERIFICATION | | | |
| BUSINESS CREDIT REPORT | | | |
| VERIFICATION OF EMPLOYMENT | | | |
| VERIFICATION OF DEPOSIT | | | |
| TOTAL: | | | \$0.99 |

Contact Advantage Credit: call (303) 670-7993 or fax (303) 670-8067
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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).

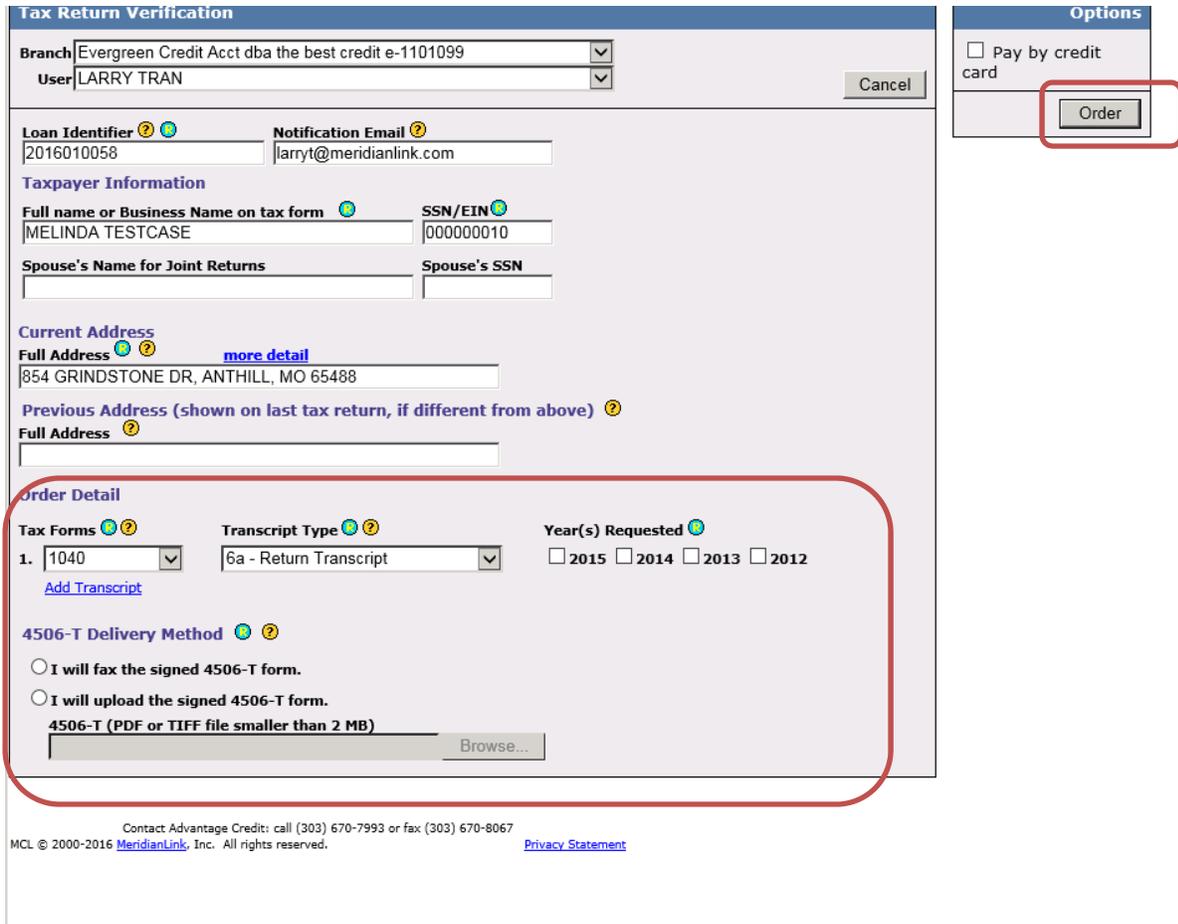
Example



Step 3:

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

Example



Tax Return Verification

Branch: Evergreen Credit Acct dba the best credit e-1101099
 User: LARRY TRAN

Loan Identifier: 2016010058
 Notification Email: larryt@meridianlink.com

Taxpayer Information

Full name or Business Name on tax form: MELINDA TESTCASE
 SSN/EIN: 000000010

Spouse's Name for Joint Returns:
 Spouse's SSN:

Current Address

Full Address: 854 GRINDSTONE DR, ANTHILL, MO 65488

Previous Address (shown on last tax return, if different from above)

Full Address:

Order Detail

Tax Forms: 1. 1040
 Transcript Type: 6a - Return Transcript
 Year(s) Requested: 2015 2014 2013 2012

4506-T Delivery Method

I will fax the signed 4506-T form.
 I will upload the signed 4506-T form.
 4506-T (PDF or TIFF file smaller than 2 MB) Browse...

Options

Pay by credit card

Contact Advantage Credit: call (303) 670-7993 or fax (303) 670-8067
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END