

## Advantage 4506-T within Encompass® by Ellie Mae®

Borrower file loaded into Encompass. In the lower left corner, click on the 'Services' tab, and a list of vendor categories will be displayed.

The screenshot displays the Encompass360 software interface for a borrower file. The window title is "Encompass360 - (Local) - knakamura - 3010000024". The main menu includes "Home", "Pipeline", "Loan", "Trades", "Contacts", "Dashboard", and "Reports". The "Borrowers" section is active, showing details for "Marisol L. Testcase".

Loan details include: 220 Locus Ave, anthill, MO 65488; Loan #: 0904EM000159; LTV: 66.667/66.667; Rate: 6.000%; Est Closing Date: //; Loan Amount: \$100,000.00; DTI: /; Not Locked.

The "Borrower Summary - Origination" section shows: Channel: Brokered; Application Date: 09/18/2006; Current Status: Active Loan; Date: //.

The "Borrower Information" section includes fields for Borrower and Co-Borrower: First Name, Middle, Last Name, SSN, DOB, H. Phone, W. Phone, Cell, and Marital Status. The Borrower's information is populated: Marisol L. Testcase, 000-00-0001, 10/10/1980, 123-412-3444, 123-413-4444, Married.

The "Social Security Number Verification" section includes "Order SSN Verification" and "Check Status" buttons, with fields for "The Purpose of the Transaction" and "This consent is valid for" days.

The "Company's Agent Information" section includes fields for Name, Address, City, State, and Zip. The Name is "DEMO ONLY - NOT FOR RESALE".

The "Present Address" section includes fields for City, State, and Zip. The City is "anthill", State is "MO", and Zip is "65488".

In the lower left corner, the "Services" tab is selected, displaying a list of vendor categories. A red arrow points to the "Order Verifications" option, with a text box that says "Click on 'Order Verifications'".

The status bar at the bottom right shows the date and time: 10/14 15:03 Friday, 10/28/2011.

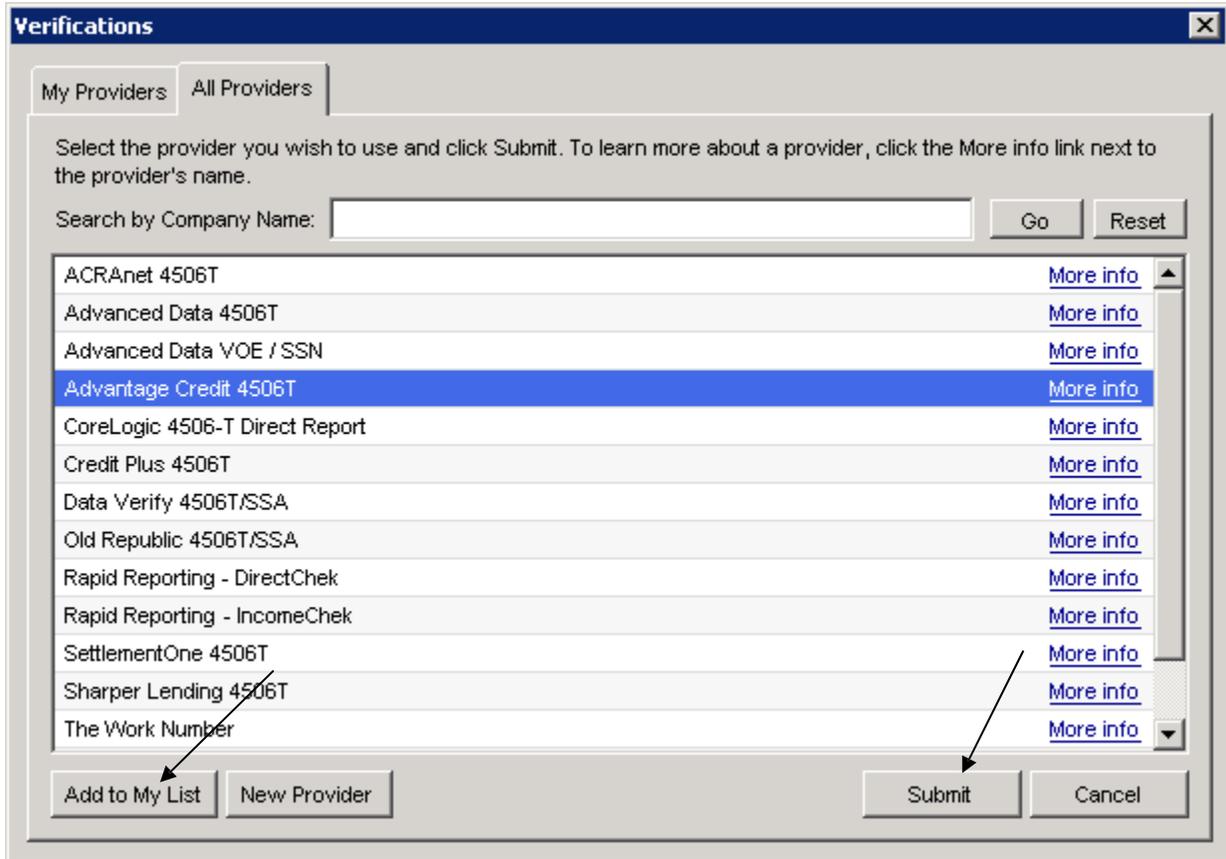


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A 'Verifications' popup will appear. For the first time user the 'All Providers' tab is selected. The user will select the 4506T vendor and click on the 'Add to My List' button. This action will save the selection in the 'My Providers' tab. Clicking on the 'Submit' button will take the user to the 4506T order interface.



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Advantage 4506 order interface.

**Order Verification**

**Advantage Credit - Verification Order**

**Log In Information**

User Name: crazy joe  
Password: \*\*\*\*\*

User Name and Password is provided by Advantage

**Loan Information**

Borrower: maria testcase  
Co-Borrower:  
Current Address: 5524 eastbourne anthill, MO. 65488  
Loan Number:

Order Income Verification | Check Status/View Result

**Products**

- 1040 - For pers
- W-2 Information - Employer reported financial data
- 1099
- 1065
- 1120

Product selection is required

**Product Options**

- Return Transcript
- Account Transcript
- Record of Account
- Verification of Nonfiling
- Other Series

Business Name:   
EIN:

Enable when products 1065 or 1120 are selected

**Order Details**

Report On: Borrower

Select transcript year(s)

- 2013
- 2012
- 2011
- 2010

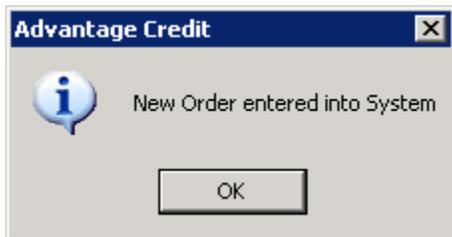
Required, more than one can be selected

Attach PDF document: Required

Attach Authorization Form

Send order to Advantage

The order has been received by Advantage.



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The user will retrieve the 4506T by clicking on the 'Check Status' button. If the document is completed Encompass will save the 4506T in the eFolder and the 'Check Status/View Result' will show 'Completed' in the 'Status' column. 'Documents returned' box will show the file that was returned, which is the 4506T PDF document.

**Order Verification**

**Advantage Credit - Verification Order**

**Log In Information**

User Name: crazy joe  
Password: \*\*\*\*\*  
 Save Log In Information

**Loan Information**

Borrower: maria testcase  
Co-Borrower:  
Current Address: 5524 eastbourne anthill, MO. 65488  
Loan Number:

Order Income Verification | **Check Status/View Result**

**Orders**

Order No.	Order Date	Report On	Request Details	Status
146854	05/14/2013	maria testcase	1099 (Year: 2013)	Complete
146857	05/14/2013	maria testcase	1099 (Year: 2011)	Pending

Documents returned: [dropdown menu]

Comments: [text area]

Buttons: Cancel Order, Check Status, Close

Annotations:

- Order is Pending or Completed (points to the 'Status' column)
- Documents received (points to the 'Documents returned' dropdown)
- Check Status will try to retrieve the 4506T (points to the 'Check Status' button)



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