

Requesting CIS 4506T through Encompass

Open the desired loan file and navigate to the **Services** tab (lower left).

Select a loan from a pipeline tab/loan folder in Encompass.

A list of vendor categories will be displayed.

Choose **Order Verifications**:

The screenshot shows the Encompass web application interface. At the top, there is a navigation bar with tabs for Home, Pipeline, Loan, Trades, Contacts, Dashboard, and Reports. Below this, the 'Borrowers' section is active, displaying loan details for loan # 1903000040. The 'Services' tab is selected in the left-hand menu, and a red circle highlights it. A red arrow points to the 'Order Verifications' option within the Services list. The main content area shows a 'Submittal Worksheet' with fields for Loan Officer, Loan Processor, Underwriter, Days to Finish, and Est Closing Date. There are also sections for Documents, Tasks, Required Fields, and Milestone Comments.

A Verifications window will appear

On initial 4506T request, the All Providers tab appears. Select **CIS 4506T** and click **Add to My List**. This action will save the selection in the My Providers tab. For repeat users, **CIS 4506T** will appear in the **My Providers** tab. Click **Submit** on bottom right, to navigate to the 4506T order interface:

The screenshot shows a 'My Providers' window with two tabs: 'My Providers' and 'All Providers'. The 'All Providers' tab is active, and a list of providers is displayed. The 'CIS 4506-T' provider is selected, and a red arrow points to it. At the bottom right of the window, there are three buttons: 'Remove from My List', 'Submit', and 'Cancel'. A red arrow points to the 'Submit' button.

To Request CIS 4506T:

1. Enter your **CIS UserName** and **password**
2. Select the **Product** (tax return type filed) and **Report On: Joint, Borrower, Co-Borrower**
3. Select the **Transcript Year(s)** required
4. Select **Product Options** (transcript type)
5. Attach the **4506T Request form** & select if the 4506T request was **e-signed**
6. Choose **Submit Order**

CIS - Verification Order

<div style="background-color: #e6f2ff; padding: 2px; border: 1px solid #ccc;">Log In Information</div> <p>User Name: <input type="text" value="Sharin"/> 1</p> <p>Password: <input type="password" value="*****"/></p> <p><input type="checkbox"/> Save Log In Information</p>	<div style="background-color: #e6f2ff; padding: 2px; border: 1px solid #ccc;">Loan Information</div> <p>Borrower: Bill C Testcase</p> <p>Co-Borrower:</p> <p>Current Address: 8842 48th Ave</p> <p style="padding-left: 20px;">Anthill, MO. 65488</p> <p>Loan Number: 1903000040</p>
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Order Income Verification

Check Status/View Result

Products 2						
Product	Report On	Years	Options	Business Name	EIN	
<input type="checkbox"/> 1040	Borrower					
<input type="checkbox"/> W-2 Borrower	Borrower					
<input type="checkbox"/> 1099 Borrower	Borrower					
<input type="checkbox"/> 1065						
<input type="checkbox"/> 1120						

Order Details

Report On: Borrower

Business Name: When ordering 1165 or 1120, business name & EIN required

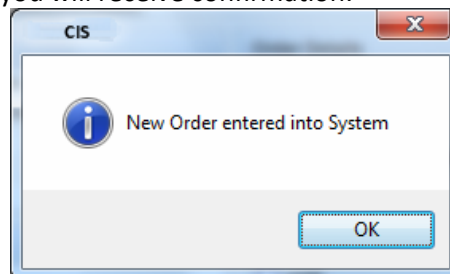
EIN:

<div style="background-color: #e6f2ff; padding: 2px; border: 1px solid #ccc;">Select transcript year(s)</div> <p><input type="checkbox"/> 2018 3 - multiple years' data available in one request</p> <p><input type="checkbox"/> 2017</p> <p><input type="checkbox"/> 2016</p> <p><input type="checkbox"/> 2015</p>	<div style="background-color: #e6f2ff; padding: 2px; border: 1px solid #ccc;">Product Options 4</div> <p><input type="checkbox"/> Return Transcript</p> <p><input type="checkbox"/> Account Transcript</p> <p><input type="checkbox"/> Record of Account</p> <p><input type="checkbox"/> Verification of Nonfiling</p> <p><input type="checkbox"/> Other Series</p>
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Is this an electronically signed 4506-T? Yes No 5 - upload the signed 4506T request form

select if the 4506T was e-signed

After your request is submitted, you will receive confirmation:



Use the **Check Status/View Result** tab to view 4506T requests previously requested. If the document is completed Encompass will save the returned transcript file in the eFolder and the Status column will show as Completed. The Documents returned box will display the returned transcript file in PDF format:

[More information on CIS 4506T can be found at this link.](#)

[Tip sheet](#) to assist in avoiding IRS rejections.

Download the [4506T Request Form](#). Please do not change line 5a as it contains the CIS/IRS mailbox detail. Line 5a must read: **TaxReturnVerification.com 327 Caldwell Drive #100 Goodlettsville, TN 37072 P:615-250-2005 #MTHOMAS1**