

## Requesting CIS 4506C 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's a navigation bar with 'Home', 'Pipeline', 'Loan', 'Trades', 'Contacts', 'Dashboard', and 'Reports'. Below this, the 'Borrowers' section is active, showing loan details for 'Bill C. Testcase' with loan number 1903000040. A 'Submittal Worksheet' section is visible with fields for Loan Officer, Loan Processor, Underwriter, Days to Finish, and Est Closing Date. On the left, a 'Forms' menu is expanded, and the 'Services' tab is circled in red. Within the 'Services' menu, 'Order Verifications' is highlighted with a red arrow. Other menu items include Order Title & Closing, Order Doc Preparation, Register MERS, Order AVM, Order Mortgage Insurance, Order Fraud/Audit Services, Request HMDA Management, Order Additional Services, and Submit Investors.

A Verifications window will appear

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

The screenshot shows a 'My Providers' dialog box with two tabs: 'My Providers' and 'All Providers'. The 'All Providers' tab is selected, displaying a list of providers. The first entry, 'CIS 4506-T', is highlighted in blue, with a red arrow pointing to it. Below the list, there are three buttons: 'Remove from My List', 'Submit', and 'Cancel'. A red arrow points to the 'Submit' button.

## To Request CIS 4506C:

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 **4506C Request form** & select if the 4506C 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 style="width: 100%;" type="text" value="Sharin"/></p> <p>Password: <input style="width: 100%;" 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: <b>Bill C Testcase</b></p> <p>Co-Borrower:</p> <p>Current Address: <b>8842 48th Ave</b></p> <p style="padding-left: 20px;"><b>Anthill, MO. 65488</b></p> <p>Loan Number: <b>1903000040</b></p>
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Order Income Verification

Check Status/View Result

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

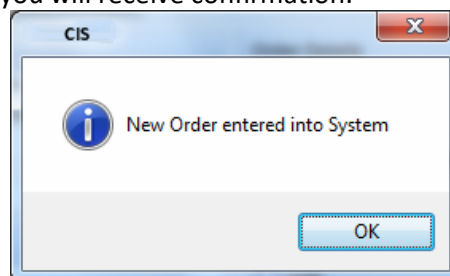
<div style="background-color: #e6f2ff; padding: 2px; border: 1px solid #ccc;">Select transcript year(s)</div> <p><input type="checkbox"/> 2018</p> <p><input type="checkbox"/> 2017</p> <p><input type="checkbox"/> 2016</p> <p><input type="checkbox"/> 2015</p> <p style="color: red; font-weight: bold;">3 - multiple years' data available in one request</p>	<div style="background-color: #e6f2ff; padding: 2px; border: 1px solid #ccc;">Product Options</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> <p style="color: red; font-weight: bold;">4</p>
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5 - upload the signed 4506C request form

Is this an electronically signed 4506-T?  Yes  No Attach Authorization Form

select if the 4506C was e-signed

After your request is submitted, you will receive confirmation:



Use the **Check Status/View Result** tab to view 4506C 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:

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

Download the [4506C 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**