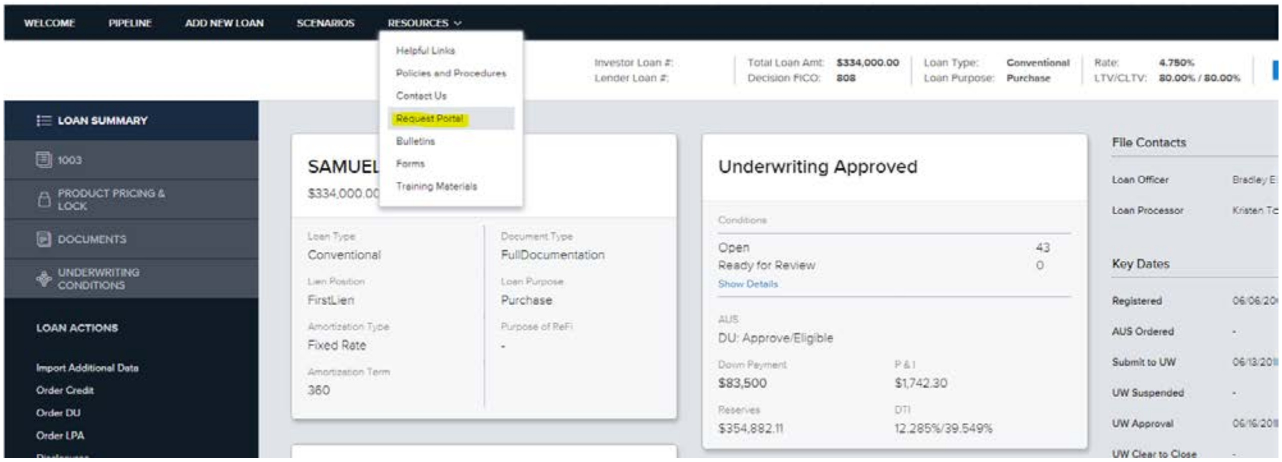
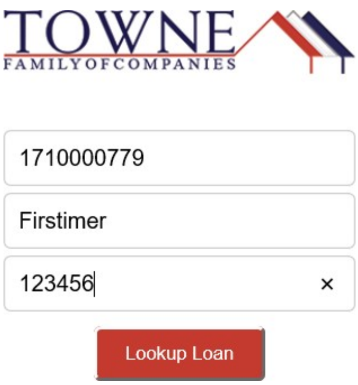
HOW TO: Request Transcripts

Step 1: Open your loan from the pipeline in TPO Connect and Click on Resources, Request Portal.



Step 2: The portal will open in a separate browser. Enter the following:

- Loan Number
- Last Name (Borrower)
- Organization ID (Originator's Company NMLS ID)

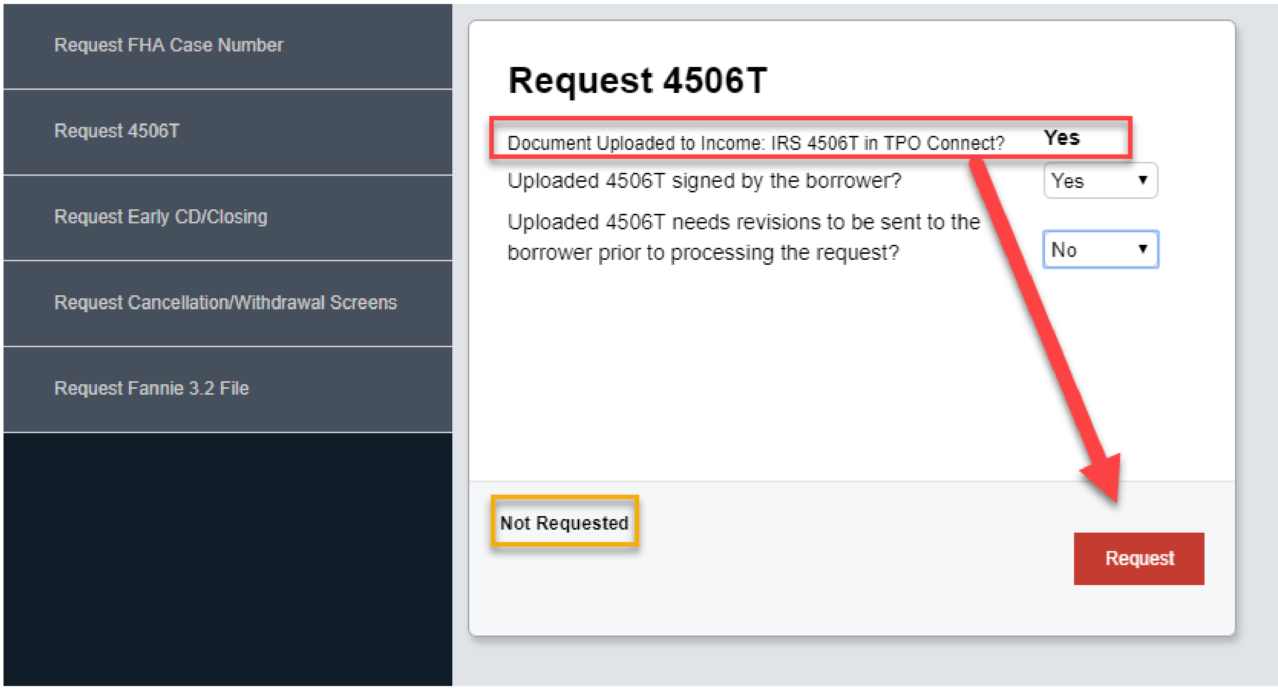


Step 3: Click on Request 4506T to complete the **Request**.

NOTE: Upon submission of your file in TPO Connect, the 4506T will be sorted into the document placeholder "**Income: IRS 4506T**" which will default to "**Yes"** for the "Document uploaded to Income: IRS 4506T in TPO Connect?"

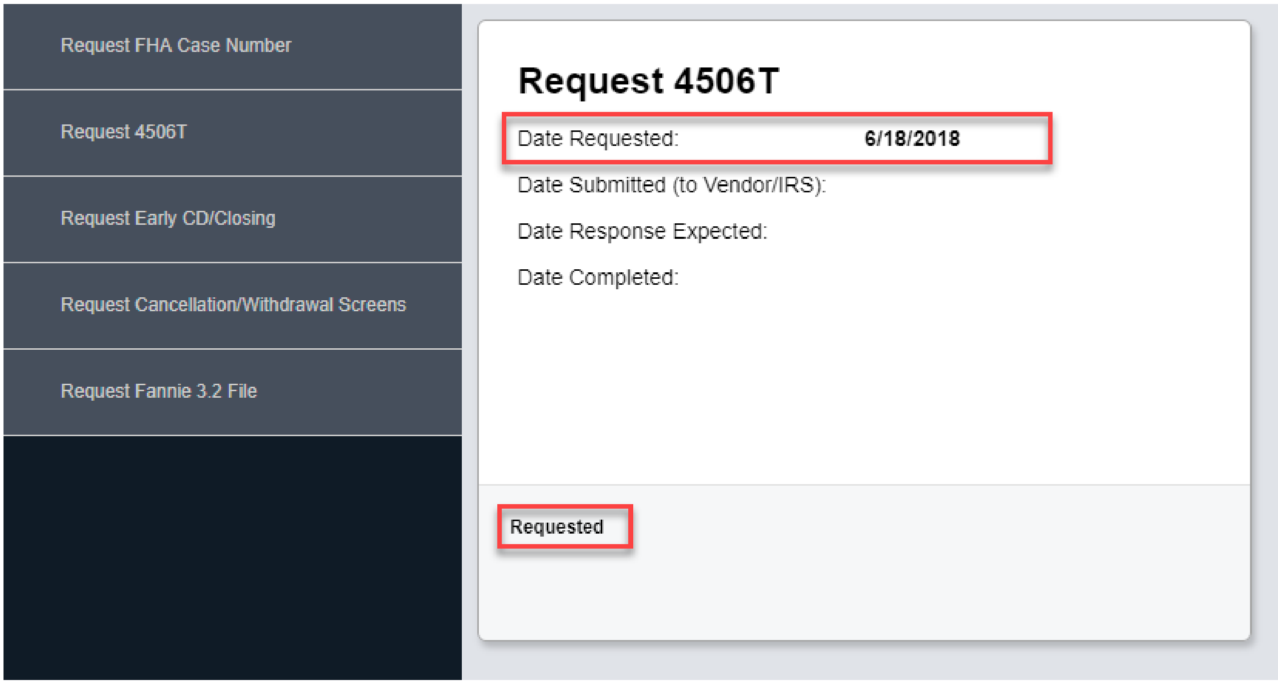
Step 4: Verify **Yes** is populated, and answer the two additional questions using the dropdown options.

Step 5: The Request Button will appear. Click the **Request** button.



Step 6: Production Support Team will receive notification to order transcripts.

Once you hit the **Request** button, the screen will populate the requested date and “Requested” will appear in the lower left-hand corner.



When the 4506T is **Submitted** (to Vendor/IRS) and then **Completed**, the other dates will populate.

You will be able to log back in to the Request Portal to monitor completion.

If you have questions, please contact salessupport@townemortgage.com