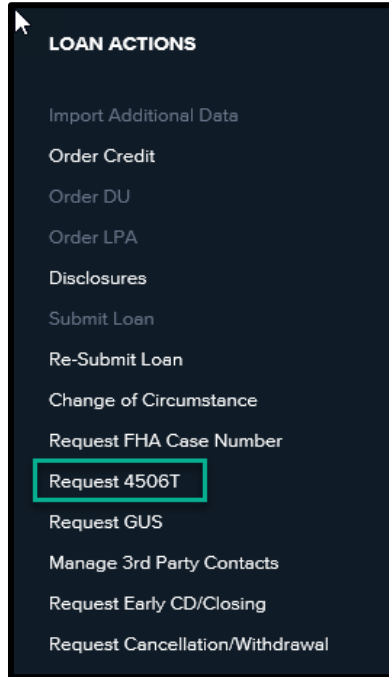




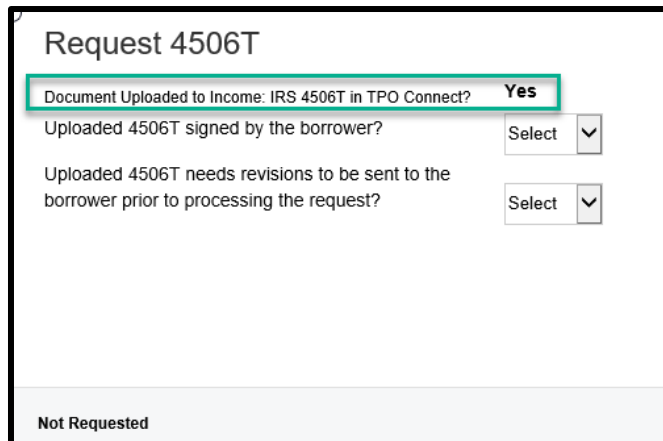
## HOW TO: Request Tax Transcripts

Step 1: Access your loan in TPO Connect and click on Request 4506T under Loan Actions.



Step 2: Once you have uploaded the completed 4506T document, you will receive a Yes next to document uploaded.

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



Step 3: Answer both questions using the drop-down and hit Request.

- Is the document signed by the borrower?
- Are any revisions needed prior to the request? (Double check the addresses on the form.)

**NOTE:** Once both questions are answered the Request button will appear.

The screenshot shows a form titled "Request 4506T". At the top, it says "Document Uploaded to Income: IRS 4506T in TPO Connect?" followed by the word "Yes". Below this, there are two questions, each with a dropdown menu:

- Uploaded 4506T signed by the borrower? (Dropdown menu shows "Yes")
- Uploaded 4506T needs revisions to be sent to the borrower prior to processing the request? (Dropdown menu shows "No")

At the bottom of the form, there is a status indicator "Not Requested" on the left, a green arrow pointing right in the center, and a red "Request" button on the right.

Step 4: After you hit the Request button, the information will be pushed to our Sales Support team to complete.

- A date will also appear next to Date Requested.

The screenshot shows the same "Request 4506T" form, but now the status is "Requested" at the bottom. The "Date Requested" field is highlighted with a green box and contains the date "2/8/2019". Below it, the following fields are visible but empty:

- Date Submitted (to Vendor/IRS):
- Date Response Expected:
- Date Completed:

Step 5: Once the request has been submitted to the IRS and returned/completed – those dates will populate as well.

**Request 4506T**

Date Requested:	<b>02/08/2019</b>
Date Submitted (to Vendor/IRS):	<b>02/08/2019</b>
Date Response Expected:	
Date Completed:	<b>02/13/2019</b>

**If you have questions, please contact [sallessupport@townemortgage.com](mailto:sallessupport@townemortgage.com)**