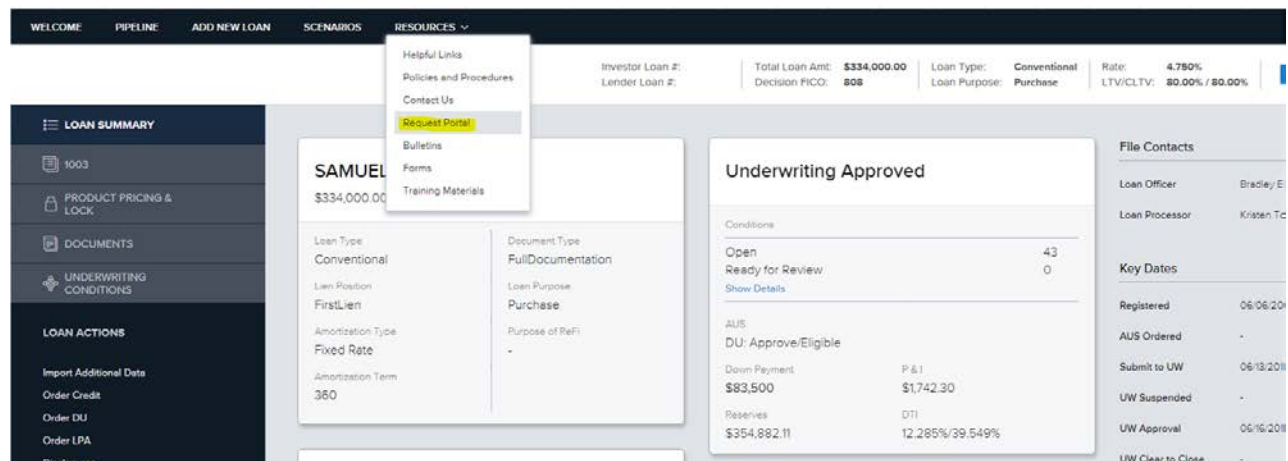


# Encompass How-To Request Transcripts



## 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)



Loan Number

Last Name

Organization Id

1710000779

Firstimer

123456 x

Lookup Loan

Lookup Loan

# Encompass How-To Request Transcripts

**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.

The screenshot shows a sidebar on the left with navigation options: Request FHA Case Number, Request 4506T, Request Early CD/Closing, Request Cancellation/Withdrawal Screens, and Request Fannie 3.2 File. The main content area is titled "Request 4506T" and contains the following form elements:

- Question 1: "Document Uploaded to Income: IRS 4506T in TPO Connect?" with a dropdown menu set to "Yes".
- Question 2: "Uploaded 4506T signed by the borrower?" with a dropdown menu set to "Yes".
- Question 3: "Uploaded 4506T needs revisions to be sent to the borrower prior to processing the request?" with a dropdown menu set to "No".
- A "Not Requested" button (highlighted with a yellow box) is located at the bottom left of the form.
- A "Request" button (highlighted with a red box) is located at the bottom right of the form.

A red arrow points from the "Yes" dropdown of the first question to the "Request" button.

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

# Encompass How-To Request Transcripts

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

The screenshot displays a web interface for requesting transcripts. On the left is a dark sidebar with navigation links: 'Request FHA Case Number', 'Request 4506T', 'Request Early CD/Closing', 'Request Cancellation/Withdrawal Screens', and 'Request Fannie 3.2 File'. The main content area is titled 'Request 4506T' and contains the following fields:

- Date Requested:** 6/18/2018 (highlighted with a red box)
- Date Submitted (to Vendor/IRS):** (empty)
- Date Response Expected:** (empty)
- Date Completed:** (empty)

At the bottom of the form area, there is a button labeled 'Requested' (highlighted with a red box).

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 [salesupport@townemortgage.com](mailto:salesupport@townemortgage.com)