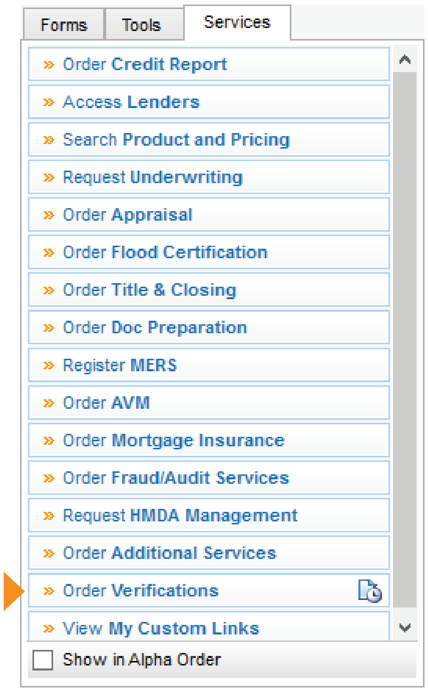
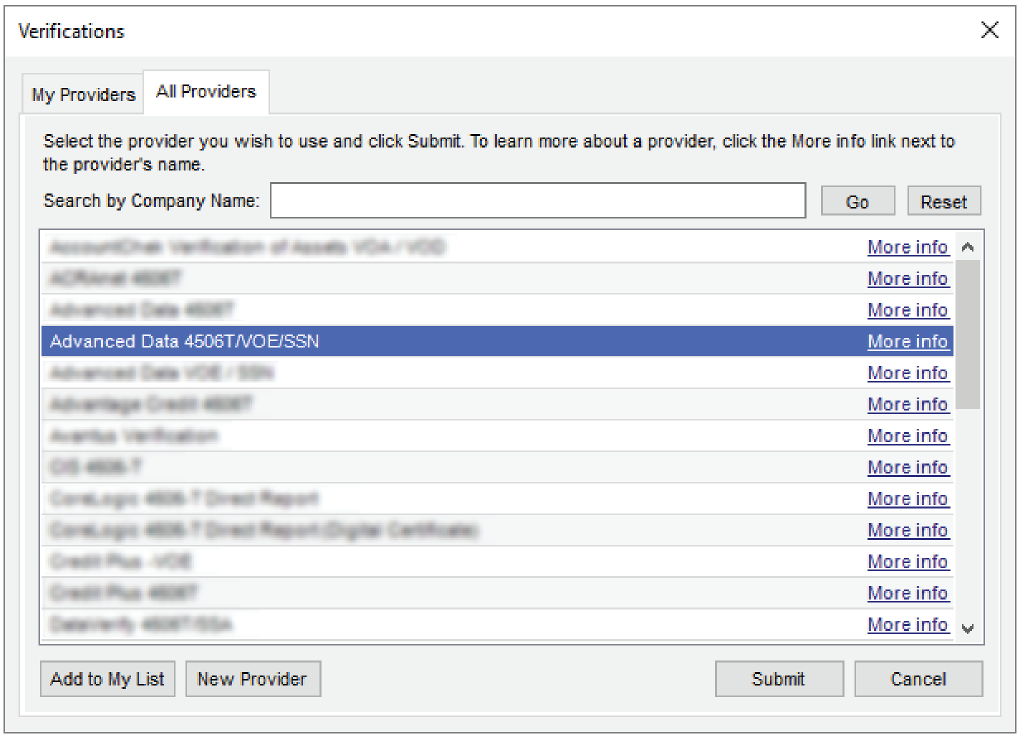
Placing Orders with Advanced Data Through Encompass®

Our new Encompass interface is designed to be fast, user friendly, and flexible. Users can simultaneously order ITV 4506-T, VOE, SSNV, and VOD.



To begin, select your loan, then choose "Order Verifications" from the Services tab.

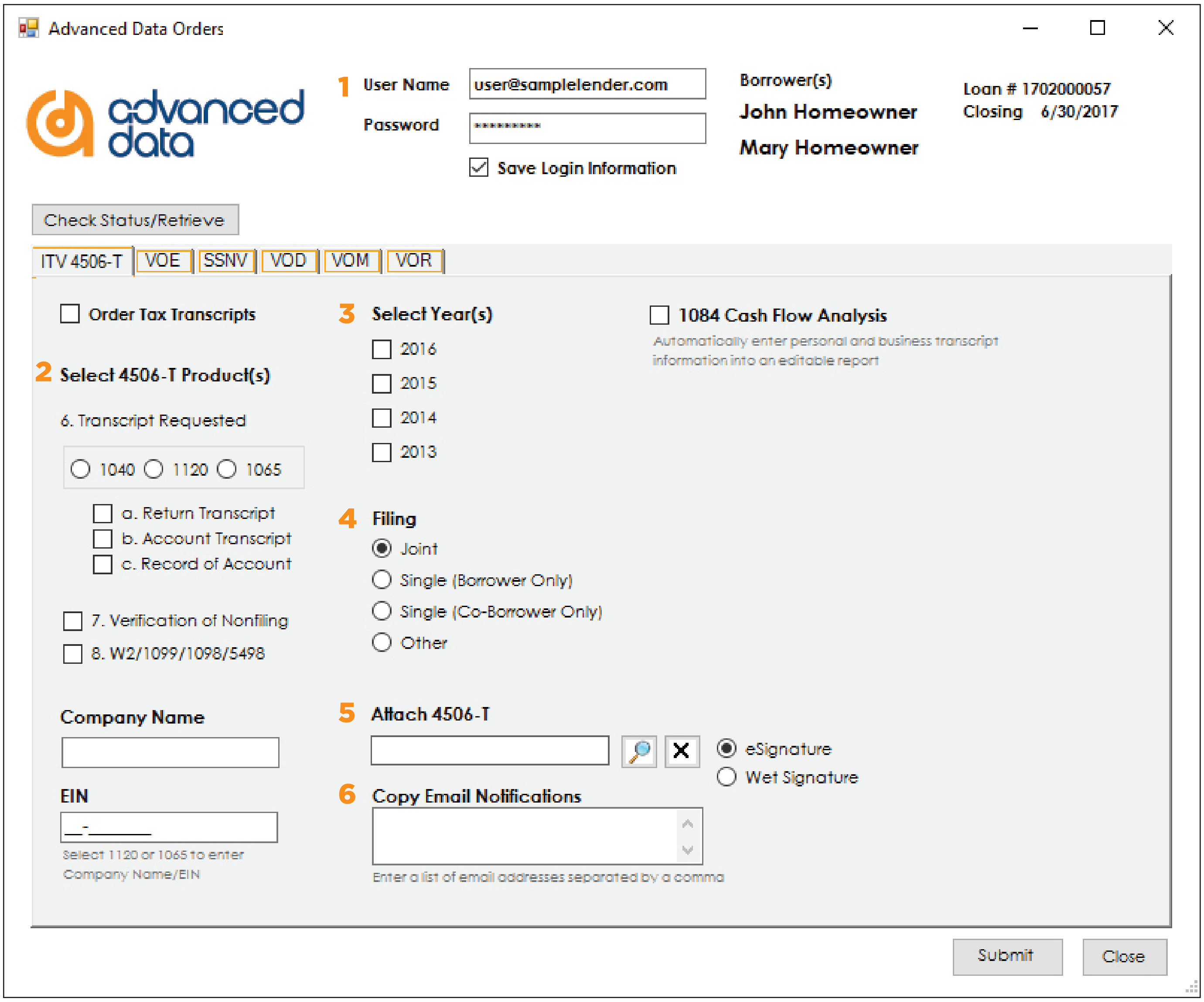


Select "Advanced Data 4506T/VOE/SSN" and then click "Add to My List". The products are now accessible from the My Providers tab.

advanced data®

Questions? Call 800.537.0458 or visit advanceddata.com/encompass

Income Tax Verification 4506-T



1. Enter email address for User Name, then enter password.

2. Select the transcripts you are ordering on the 4506-T. For business transcripts (1120, 1065), select the one you would like to order and enter the company name and EIN in the fields below.

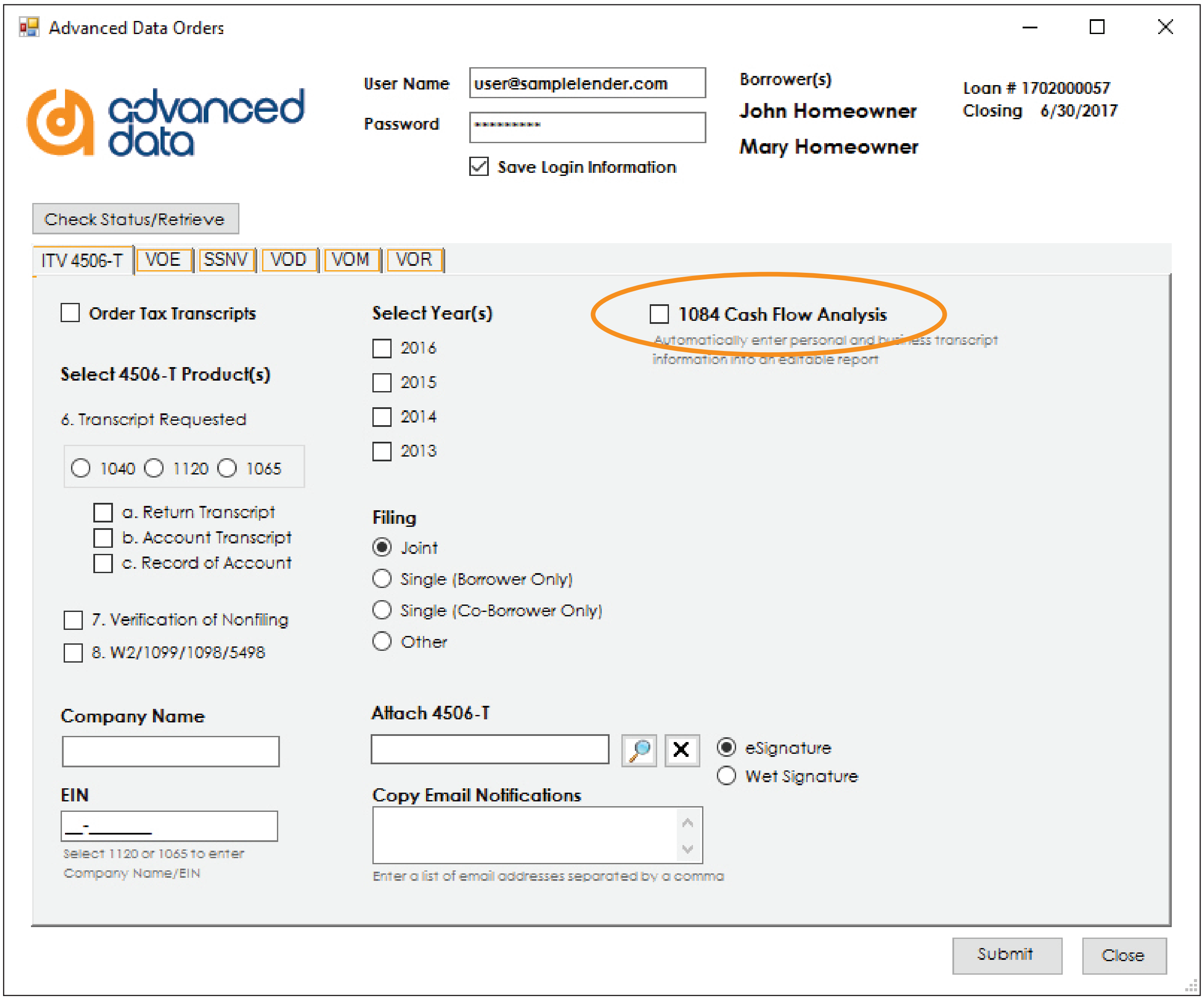
3. Select the years requested on the 4506-T.

4. Select Joint, Single, or Other filing. If there are multiple filing borrowers, an individual order will need to be placed for each.

5. Attach the 4506-T from your computer, eFolder, or eVault.

6. Enter email addresses of any Advanced Data users in your organization and they will be copied on order notifications.

1084 Cash Flow Analysis



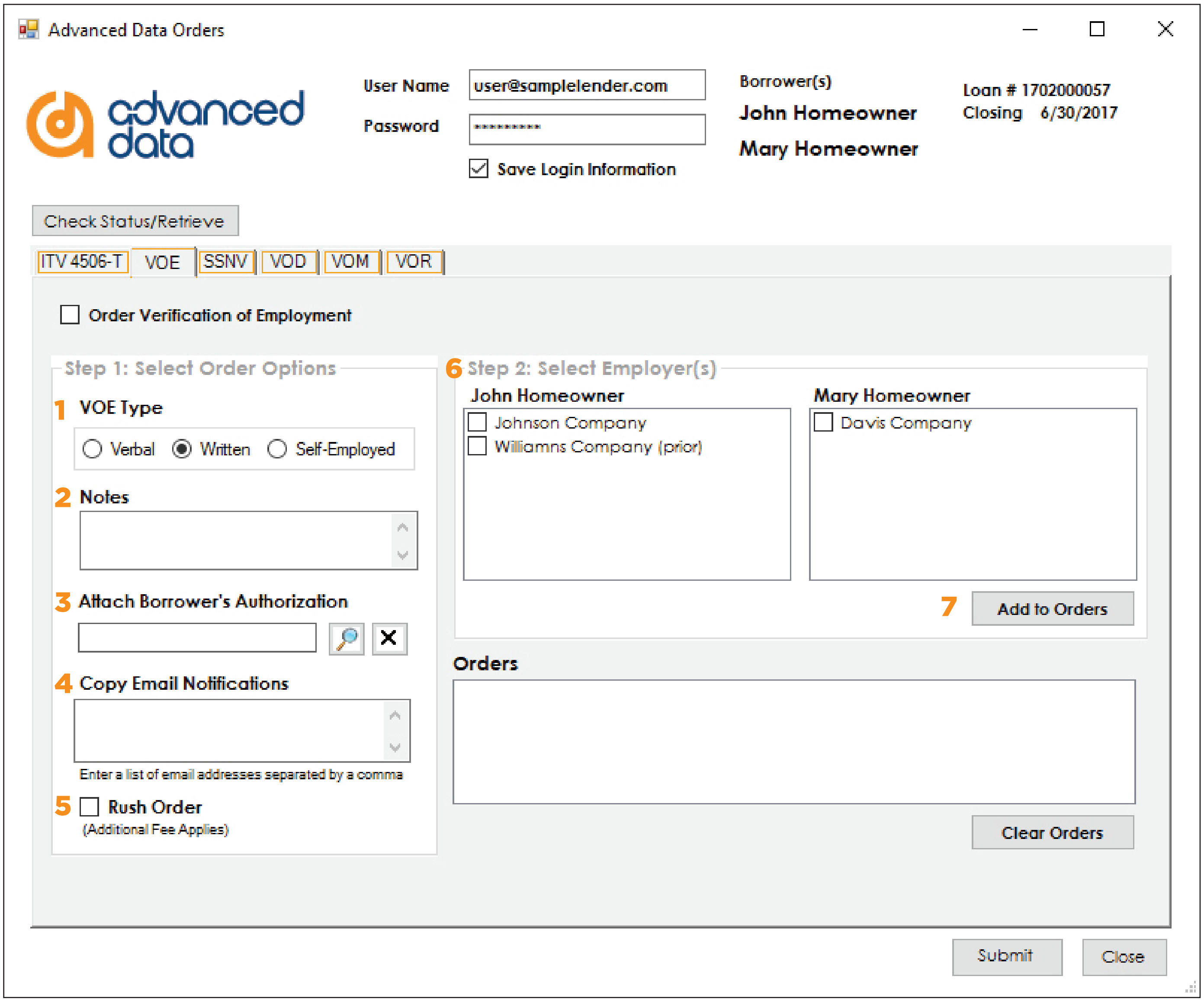
1084 Cash Flow Analysis takes data from personal and business tax transcripts and automatically enters it into a 1084 form. To order:

1. **Check "1084 Cash Flow Analysis" for EACH order that needs to be included on the 1084 form.**

2. **After all the included orders have been completed, a 1084 form will be generated and can be downloaded through the "Check Status/Retrieve" menu.**

3. **The downloaded form is an editable PDF that allows additional information from other sources to be added as needed.**

Verification of Employment



1. Select VOE Type.
2. Add any notes, including requests for additional information to be verified.
3. Attach borrower's authorization.
4. Enter email addresses to be copied on order notifications.
5. Request rush order (additional fee applies).
6. Choose employer(s) to verify. Options selected in Step 1 will apply to all orders.
7. Add employers to order. Repeat from Step 1 as necessary.

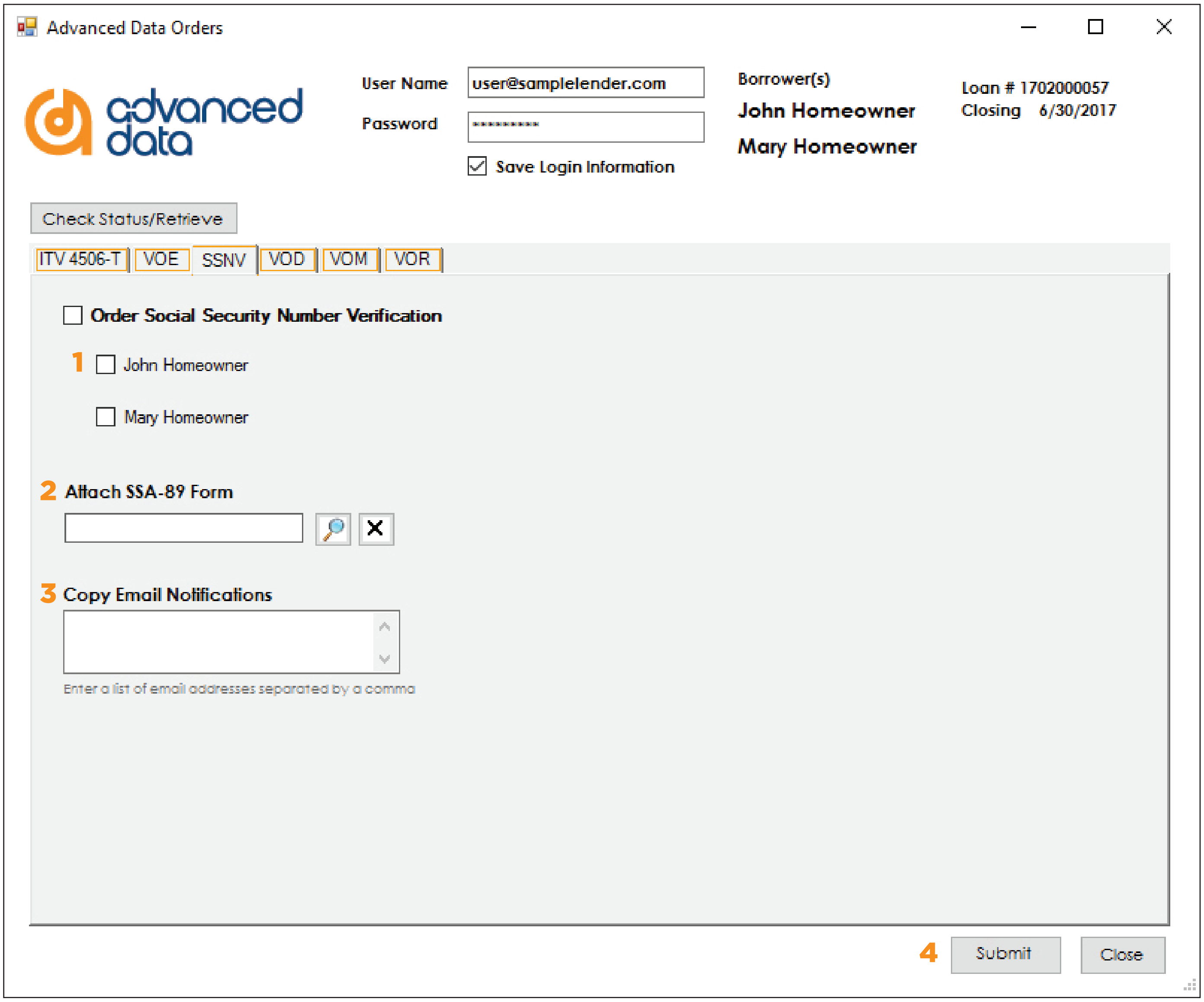
VOE ORDER TYPES

Verbal - Employment information confirmed verbally and compiled in a report.

Written - Complete 1005 form including income breakdown.

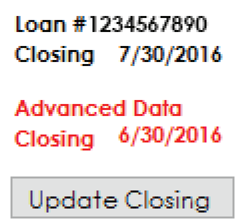
Self Employed - Employment/Business Ownership verified through a CPA letter or another outside source.

Social Security Number Verification



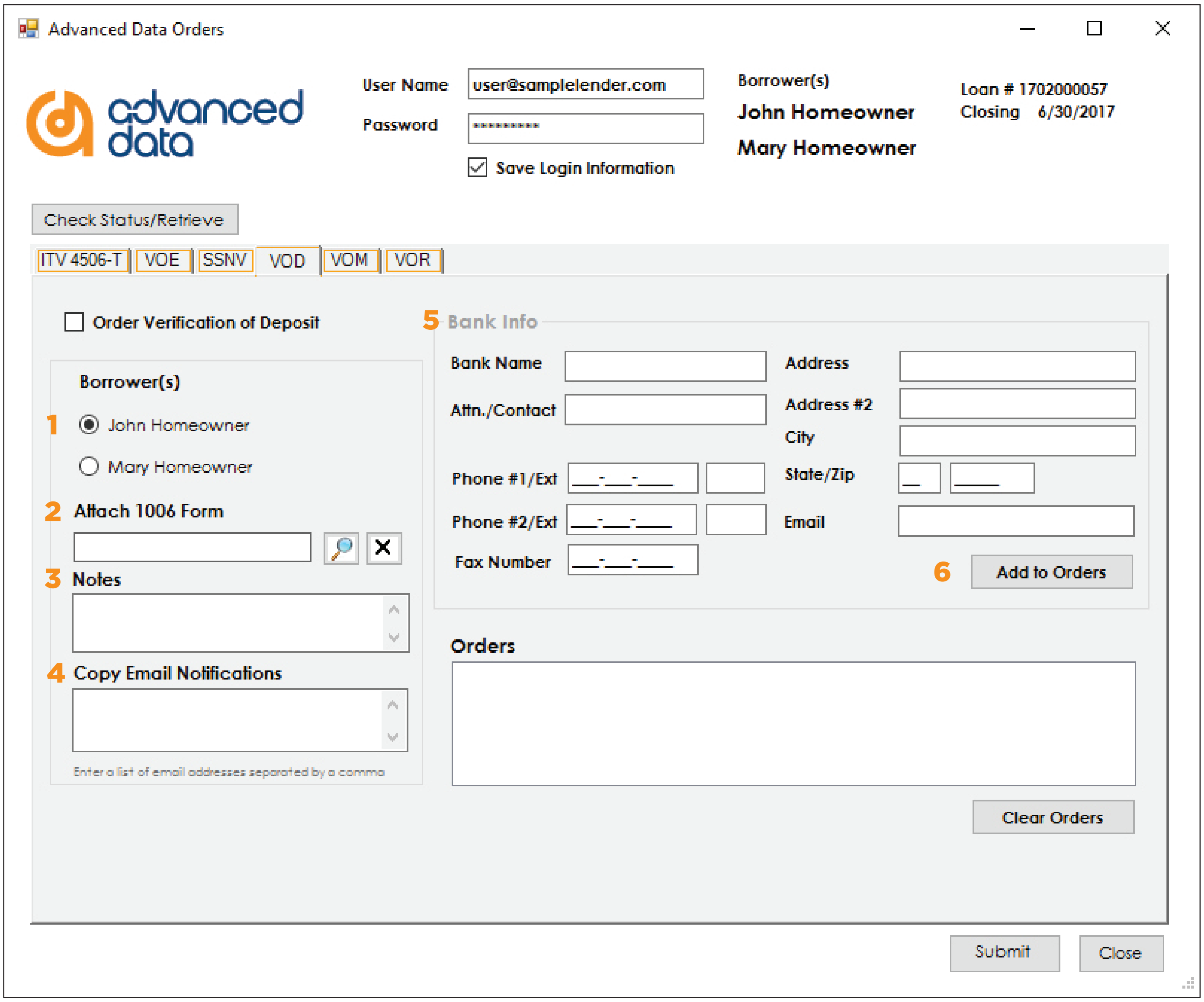
1. Choose to request verification for the borrower, co-borrower, or both.
2. Attach SSA-89.
3. Enter email addresses to be copied on order notifications.
4. Click "Submit Order" to review your choices and send to Advanced Data.

Closing Date



If the closing date has been changed on the loan, clicking "Update Closing" will update all VOE orders placed with Advanced Data.

Verification of Deposit



1 Choose to request verification for the borrower, co-borrower, or both.

2 Add any notes, including requests for additional information to be verified.

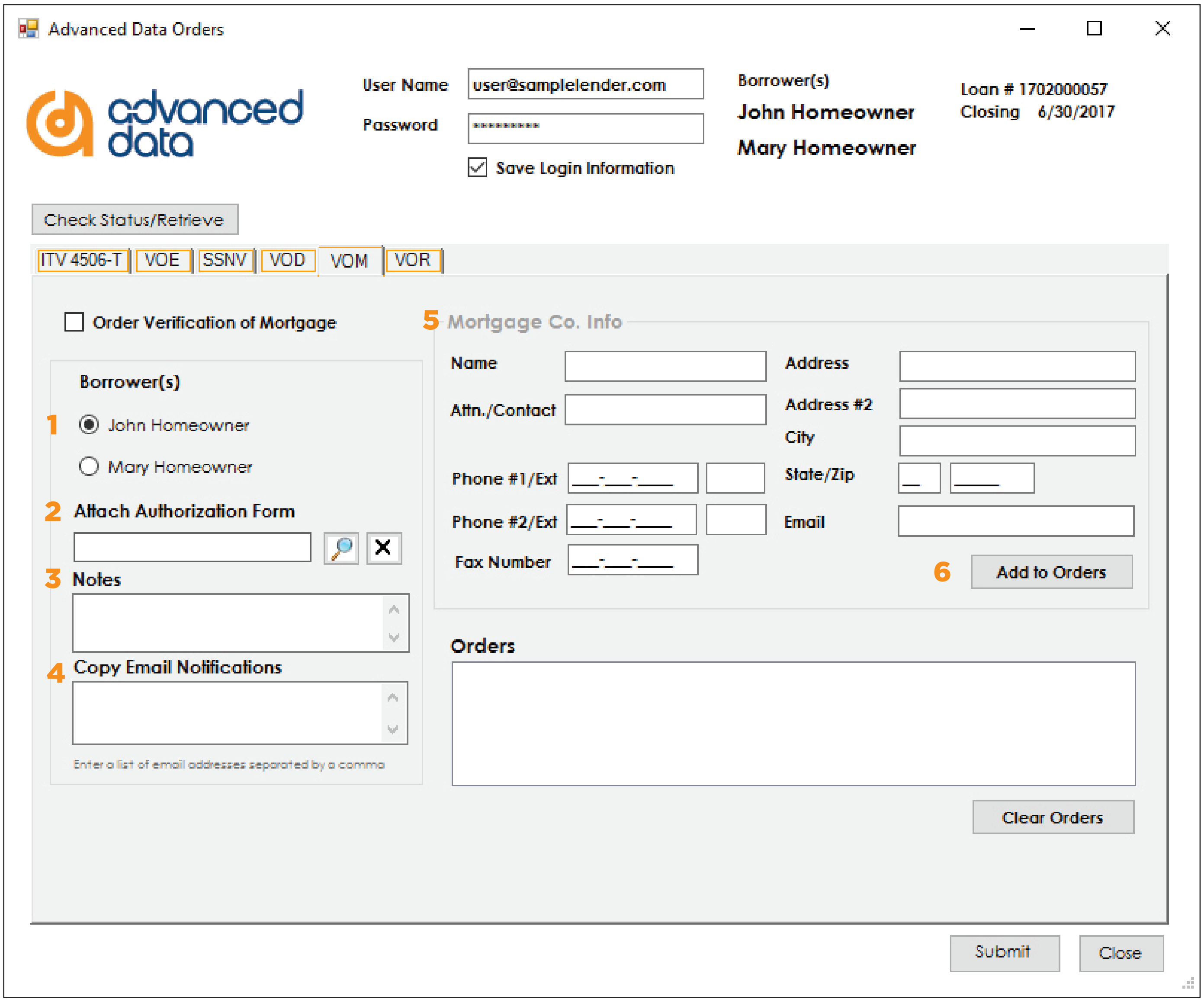
3 Attach 1006 form.

4 Enter email addresses to be copied on order notifications.

5 Enter bank information.

6 Add bank to order. Repeat from Step 1 as necessary.

Verification of Mortgage



1 Choose to request verification for the borrower, co-borrower, or both.

2 Add any notes, including requests for additional information to be verified.

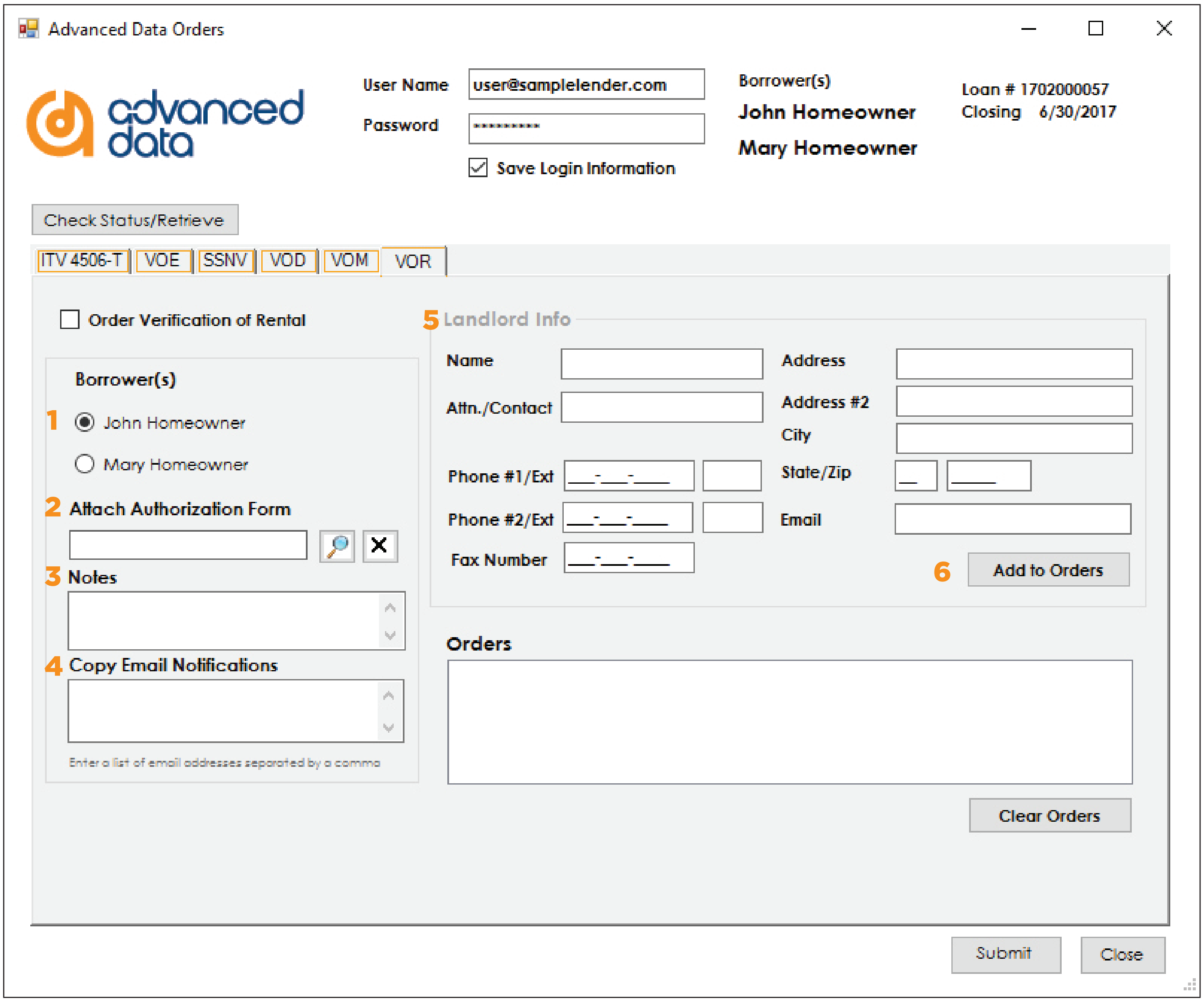
3 Attach VOM form.

4 Enter email addresses to be copied on order notifications.

5 Enter mortgage company information.

6 Add mortgage company to order. Repeat from Step 1 as necessary.

Verification of Rent



1 Choose to request verification for the borrower, co-borrower, or both.

2 Add any notes, including requests for additional information to be verified.

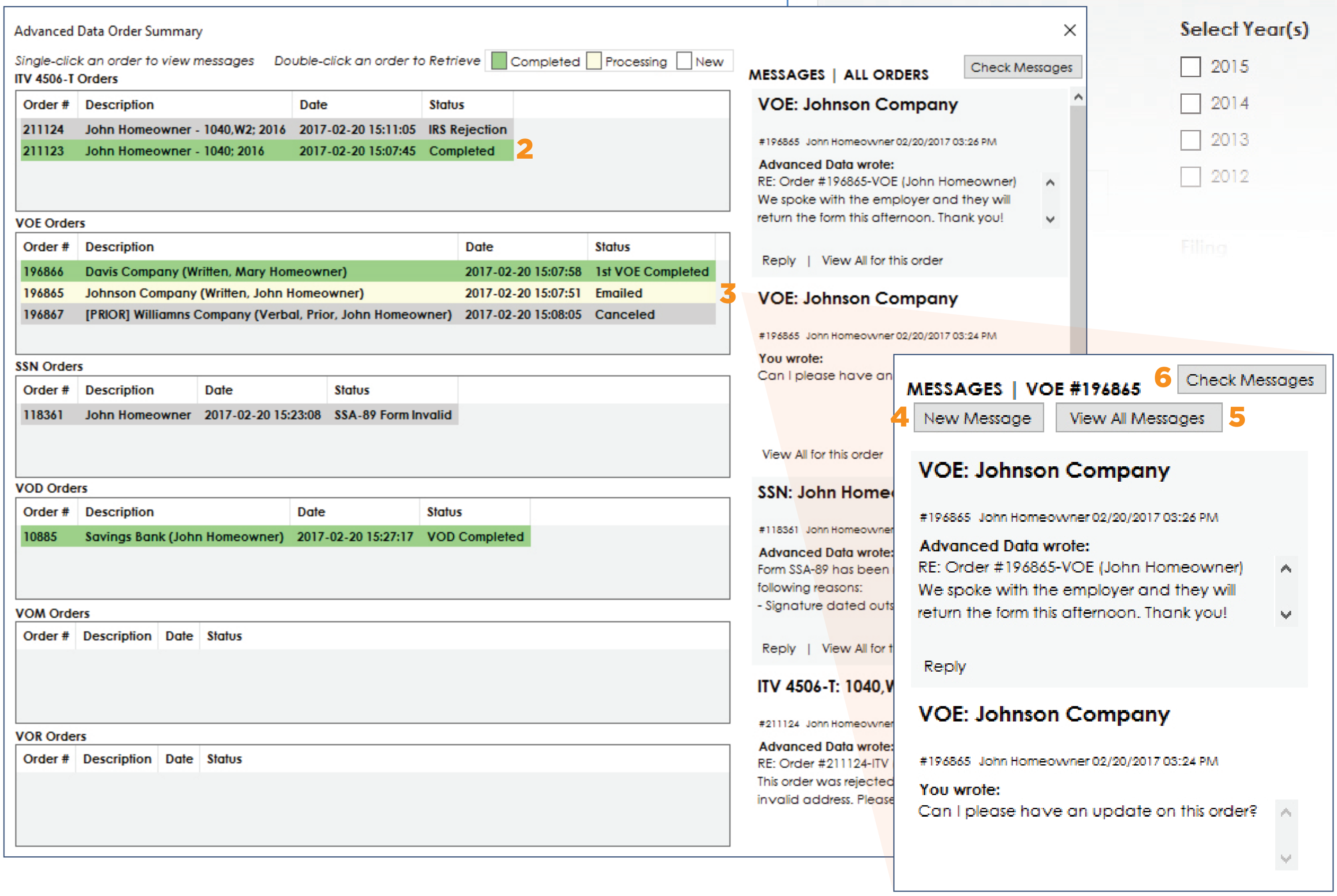
3 Attach VOR form.

4 Enter email addresses to be copied on order notifications.

5 Enter landlord's information.

6 Add landlord to order. Repeat from Step 1 as necessary.

Message Center



1 Click Check Status/Receive to launch Message Center.

2 Double click a completed order to download the report to the eFolder.

3 Single click an order to view all related messages.

4 New message or reply sends a note to the Advanced Data support team.

5 View All Messages returns to the main message timeline, showing messages for all orders related to the loan.

6 Check Messages updates all statuses and retrieves any new messages.