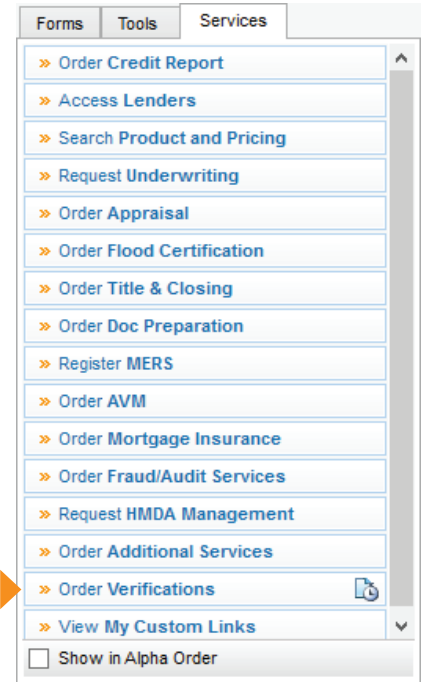


# Placing Orders with Advanced Data Through Encompass®

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.

A screenshot of the 'Verifications' window in the Encompass interface. The window has a title bar with a close button. Inside, there are two tabs: 'My Providers' (selected) and 'All Providers'. Below the tabs, there is a text box with the instruction: 'Select the provider you wish to use and click Submit. To learn more about a provider, click the More info link next to the provider's name.' Below this is a search bar labeled 'Search by Company Name:' with a 'Go' button and a 'Reset' button. A list of providers is shown, each with a 'More info' link to its right. The provider 'Advanced Data 4506T/VOE/SSN' is highlighted in blue. At the bottom of the window, there are buttons for 'Add to My List', 'New Provider', 'Submit', and 'Cancel'.

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



**Questions? Call 800.537.0458 or visit [advanceddata.com/encompass](http://advanceddata.com/encompass)**

# Income Tax Verification 4506-T

The screenshot shows the 'Advanced Data Orders' web application. At the top left is the 'advanced data' logo. The main header area contains a login section with fields for 'User Name' (filled with 'user@samplelender.com') and 'Password' (masked with asterisks), a 'Save Login Information' checkbox, and borrower information: 'Borrower(s) John Homeowner Mary Homeowner', 'Loan # 1702000057', and 'Closing 6/30/2017'. Below the header is a 'Check Status/Retrieve' button and a tabbed interface with tabs for 'ITV 4506-T', 'VOE', 'SSNV', 'VOD', 'VOM', and 'VOR'. The 'ITV 4506-T' tab is active, showing a form with several sections: 'Order Tax Transcripts' (checkbox), 'Select 4506-T Product(s)' (6. Transcript Requested with radio buttons for 1040, 1120, 1065 and checkboxes for a. Return Transcript, b. Account Transcript, c. Record of Account; 7. Verification of Nonfiling; 8. W2/1099/1098/5498), 'Select Year(s)' (3 with checkboxes for 2016, 2015, 2014, 2013), 'Filing' (4 with radio buttons for Joint, Single (Borrower Only), Single (Co-Borrower Only), Other), 'Attach 4506-T' (5 with a file upload button, a close button, and radio buttons for eSignature and Wet Signature), and 'Copy Email Notifications' (6 with a text area and a note to enter email addresses separated by a comma). At the bottom right are 'Submit' and 'Close' buttons.

- 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

Advanced Data Orders

User Name: user@samplelender.com  
Password: [REDACTED]  
☒ Save Login Information

Borrower(s): John Homeowner, Mary Homeowner  
Loan #: 1702000057  
Closing: 6/30/2017

Check Status/Retrieve

ITV 4506-T | VOE | SSNV | VOD | VOM | VOR

☐ Order Tax Transcripts

Select 4506-T Product(s)  
6. Transcript Requested  
☐ 1040 ☐ 1120 ☐ 1065

☐ a. Return Transcript  
☐ b. Account Transcript  
☐ c. Record of Account

☐ 7. Verification of Nonfiling  
☐ 8. W2/1099/1098/5498

Company Name: [REDACTED]  
EIN: [REDACTED]  
Select 1120 or 1065 to enter Company Name/EIN

Select Year(s)  
☐ 2016  
☐ 2015  
☐ 2014  
☐ 2013

Filing  
☒ Joint  
☐ Single (Borrower Only)  
☐ Single (Co-Borrower Only)  
☐ Other

Attach 4506-T  
[REDACTED] [X] ☒ eSignature ☐ Wet Signature

Copy Email Notifications  
[REDACTED]  
Enter a list of email addresses separated by a comma

☐ 1084 Cash Flow Analysis  
Automatically enter personal and business transcript information into an editable report

Submit Close

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

The screenshot shows the 'Advanced Data Orders' web application. At the top, there's a header with the 'advanced data' logo, a login section with fields for 'User Name' (user@samplelender.com) and 'Password' (masked), a 'Save Login Information' checkbox, and borrower information: 'Borrower(s) John Homeowner Mary Homeowner', 'Loan # 1702000057', and 'Closing 6/30/2017'. Below the header is a 'Check Status/Retrieve' button and a row of tabs: 'ITV 4506-T', 'VOE' (selected), 'SSNV', 'VOD', 'VOM', and 'VOR'. The main content area is divided into two columns. The left column is titled 'Step 1: Select Order Options' and contains: 1. 'VOE Type' with radio buttons for 'Verbal', 'Written' (selected), and 'Self-Employed'. 2. 'Notes' with a text area. 3. 'Attach Borrower's Authorization' with a text area and a magnifying glass icon. 4. 'Copy Email Notifications' with a text area and a note 'Enter a list of email addresses separated by a comma'. 5. 'Rush Order' checkbox with the note '(Additional Fee Applies)'. The right column is titled 'Step 2: Select Employer(s)' and contains: 6. Two sections for 'John Homeowner' and 'Mary Homeowner'. Under 'John Homeowner', there are checkboxes for 'Johnson Company' and 'Williams Company (prior)'. Under 'Mary Homeowner', there is a checkbox for 'Davis Company'. 7. An 'Add to Orders' button. Below these sections is an 'Orders' list area with a 'Clear Orders' button. At the bottom right are 'Submit' and 'Close' buttons.

- 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

The screenshot shows the 'Advanced Data Orders' web application. At the top, there is a header with the 'advanced data' logo, a 'Check Status/Retrieve' button, and a navigation bar with tabs: 'ITV 4506-T', 'VOE', 'SSNV', 'VOD', 'VOM', and 'VOR'. The 'VOD' tab is selected. Below the navigation bar, there are four numbered steps: 1. 'Order Social Security Number Verification' with checkboxes for 'John Homeowner' and 'Mary Homeowner'. 2. 'Attach SSA-89 Form' with a text input field and a magnifying glass icon. 3. 'Copy Email Notifications' with a text input field and a note to 'Enter a list of email addresses separated by a comma'. 4. 'Submit' and 'Close' buttons. The top right of the application shows user information: 'User Name: user@samplelender.com', 'Password: [redacted]', 'Save Login Information' checkbox, 'Borrower(s): John Homeowner, Mary Homeowner', and 'Loan # 1702000057, Closing 6/30/2017'.

- 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

Loan #1234567890  
Closing 7/30/2016

Advanced Data  
Closing 6/30/2016

Update Closing

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

The screenshot shows the 'Advanced Data Orders' web application. At the top, there's a header with the 'advanced data' logo, a login section with fields for 'User Name' (user@samplelender.com) and 'Password' (masked), and a 'Save Login Information' checkbox. To the right, it displays 'Borrower(s)' as 'John Homeowner' and 'Mary Homeowner', along with 'Loan # 1702000057' and 'Closing 6/30/2017'. Below the login section is a 'Check Status/Retrieve' button and a row of tabs: 'ITV 4506-T', 'VOE', 'SSNV', 'VOD', 'VOM', and 'VOR'. The main content area is titled 'Order Verification of Deposit' and contains several sections: 1. 'Borrower(s)' with radio buttons for 'John Homeowner' and 'Mary Homeowner'. 2. 'Attach 1006 Form' with a text input field and a magnifying glass icon. 3. 'Notes' with a text area. 4. 'Copy Email Notifications' with a text area and a note to 'Enter a list of email addresses separated by a comma'. 5. 'Bank Info' section with fields for 'Bank Name', 'Address', 'Attn./Contact', 'Address #2', 'City', 'Phone #1/Ext', 'State/Zip', 'Phone #2/Ext', 'Email', and 'Fax Number'. 6. 'Add to Orders' button. At the bottom right, there are 'Submit' and 'Close' buttons. The 'Orders' section at the bottom is currently empty.

**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

Advanced Data Orders



 User Name:  Borrower(s): **John Homeowner** Loan # 1702000057  
Password:  Closing: 6/30/2017  
☒ Save Login Information

Check Status/Retrieve

ITV 4506-T | VOE | SSNV | VOD | VOM | **VOR**

☐ Order Verification of Mortgage

**1** Borrower(s)  
☒ John Homeowner  
☐ Mary Homeowner

**2** Attach Authorization Form  
  

**3** Notes

**4** Copy Email Notifications  
  
Enter a list of email addresses separated by a comma

**5** Mortgage Co. Info

Name:  Address:   
Attn./Contact:  Address #2:   
City:   
Phone #1/Ext:   State/Zip:    
Phone #2/Ext:   Email:   
Fax Number:

**6**

Orders

**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

The screenshot shows the 'Advanced Data Orders' web application. At the top, there's a header with the 'advanced data' logo, a login section with fields for 'User Name' (user@samplelender.com) and 'Password' (masked), and a 'Save Login Information' checkbox. To the right, it displays 'Borrower(s)' as 'John Homeowner' and 'Mary Homeowner', along with 'Loan # 1702000057' and 'Closing 6/30/2017'. Below the header, there's a 'Check Status/Retrieve' button and a navigation bar with tabs: 'ITV 4506-T', 'VOE', 'SSNV', 'VOD', 'VOM', and 'VOR'. The main content area is titled 'Order Verification of Rental' and contains several sections: 1. 'Borrower(s)' with radio buttons for 'John Homeowner' and 'Mary Homeowner'. 2. 'Attach Authorization Form' with a text input field and a search icon. 3. 'Notes' with a text area. 4. 'Copy Email Notifications' with a text area and a note to 'Enter a list of email addresses separated by a comma'. 5. 'Landlord Info' with fields for 'Name', 'Address', 'Attn./Contact', 'Address #2', 'City', 'Phone #1/Ext', 'State/Zip', 'Phone #2/Ext', 'Email', and 'Fax Number'. 6. 'Add to Orders' button. At the bottom, there's an 'Orders' section with a large text area and a 'Clear Orders' button. The bottom of the page has 'Submit' and 'Close' buttons.

**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



User Name   
 Password   
☒ Save L

1 Check Status/Retrieve

ITV 4506-T | **VOE** | SSNV | VOD | VOM | VOR

Advanced Data Order Summary

Single-click an order to view messages Double-click an order to Retrieve ☒ Completed ☐ Processing ☐ New

ITV 4506-T Orders

Order #	Description	Date	Status
211124	John Homeowner - 1040,W2; 2016	2017-02-20 15:11:05	IRS Rejection
211123	John Homeowner - 1040; 2016	2017-02-20 15:07:45	Completed

VOE Orders

Order #	Description	Date	Status
196866	Davis Company (Written, Mary Homeowner)	2017-02-20 15:07:58	1st VOE Completed
196865	Johnson Company (Written, John Homeowner)	2017-02-20 15:07:51	Emailed
196867	[PRIOR] Williams Company (Verbal, Prior, John Homeowner)	2017-02-20 15:08:05	Canceled

SSN Orders

Order #	Description	Date	Status
118361	John Homeowner	2017-02-20 15:23:08	SSA-89 Form Invalid

VOD Orders

Order #	Description	Date	Status
10885	Savings Bank (John Homeowner)	2017-02-20 15:27:17	VOD Completed

VOM Orders

Order #	Description	Date	Status
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VOR Orders

Order #	Description	Date	Status
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MESSAGES | ALL ORDERS

Check Messages

**VOE: Johnson Company**

#196865 John Homeowner 02/20/2017 03:26 PM

**Advanced Data wrote:**  
 RE: Order #196865-VOE (John Homeowner)  
 We spoke with the employer and they will return the form this afternoon. Thank you!

Reply | View All for this order

**VOE: Johnson Company**

#196865 John Homeowner 02/20/2017 03:24 PM

**You wrote:**  
 Can I please have an

View All for this order

**SSN: John Home**

#118361 John Homeowner

**Advanced Data wrote:**  
 Form SSA-89 has been  
 following reasons:  
 - Signature dated out

Reply | View All for t

**ITV 4506-T: 1040,V**

#211124 John Homeowner

**Advanced Data wrote:**  
 RE: Order #211124-ITV  
 This order was rejected  
 invalid address. Please

Select Year(s)

☐ 2015  
☐ 2014  
☐ 2013  
☐ 2012

Filing

MESSAGES | VOE #196865

Check Messages

New Message | View All Messages

**VOE: Johnson Company**

#196865 John Homeowner 02/20/2017 03:26 PM

**Advanced Data wrote:**  
 RE: Order #196865-VOE (John Homeowner)  
 We spoke with the employer and they will return the form this afternoon. Thank you!

Reply

**VOE: Johnson Company**

#196865 John Homeowner 02/20/2017 03:24 PM

**You wrote:**  
 Can I please have an update on this order?

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.