

# Placing Orders with Advanced Data Through Encompass®

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

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

Forms	Tools	Services
» Order Credit Report		
» Access Lenders		
» Search Product and Pricing		
» Request Underwriting		
» Order Appraisal		
» Order Flood Certification		
» Order Title & Closing		
» Order Doc Preparation		
» Register MERS		
» Order AVM		
» Order Mortgage Insurance		
» Order Fraud/Audit Services		
» Request HMDA Management		
» Order Additional Services		
» Order Verifications		
» View My Custom Links		
<input type="checkbox"/> Show in Alpha Order		

Verifications

My Providers All Providers

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.

Search by Company Name:  Go Reset

AccountCheck Verification of Assets VOA/VOD	More info
ACR/RAI 4506T	More info
Advanced Data 4506T	More info
Advanced Data 4506T/VOE/SSN	More info
Advanced Data VOD - SSNV	More info
Advantage Credit 4506T	More info
Avenbus Verification	More info
CIS 4506-T	More info
CoreLogic 4506-T Direct Report	More info
CoreLogic 4506-T Direct Report (Digital Certificate)	More info
Credit Plus - VOD	More info
Credit Plus 4506T	More info
Clearview 4506T/SSA	More info

Add to My List New Provider Submit 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

Advanced Data Orders - Version 1.2.1.5 (Prd)



**1** User Name  Borrower(s) **John Homeowner** Loan # 1303000026  
Password  Closing 1/31/2019  
☒ Save Login Information **Mary Homeowner** Advanced Data  
Closing 1/31/2019

Check Status/Retrieve (800) 537-0458 Update Closing

ITV 4506-T **VOE/eVoE** SSNV VOA VOD VOM VOR

☐ Order Tax Transcripts

**2** 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

EIN

Select 1120 or 1065 to enter Company Name/EIN

**3** Select Year(s)



☐ 2017  
☐ 2016  
☐ 2015  
☐ 2014

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



**4** Filing

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

**5** Attach 4506-T

  ☒ eSignature  
☐ Wet Signature

**6** Copy Email Notifications  
click + to add or X to clear

Submit Close

- 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.

# Verification of Employment

Advanced Data Orders - Version 1.2.1.5 (Prd)

**advanced data**

User Name: sampleuser  
Password: \*\*\*\*\*  
☒ Save Login Information

Borrower(s): John Homeowner, Mary Homeowner  
Loan #: 1303000026  
Closing: 1/31/2019

Check Status/Retrieve (800) 537-0458 Update Closing

ITV 4506-T VOE/eVoE SSNV VOA VOD VOM VOR

☐ Order Verification of Employment

**Step 1: Select Order Options**

**1 VOE Type**  
☐ Verbal ☒ Written ☐ Self-Employed

**2 Notes**  
[Text Area]

**3 Attach Borrower's Authorization**  
Borrowers Authorization BLANK.pdf [X]

**4 Copy Email Notifications**  
click + to add or X to clear  
[Text Area] [+][X]

**5** ☐ Rush Order (Additional Fee Applies)  
☐ eVoE™ **Next >**

**6 Step 2: Select Employer(s)**

**John Homeowner**  
☐ Sample Company  
☐ Prior Company (prior)

**Mary Homeowner**  
☐ Co-Borrower Company

**7 Add to Orders**

**Orders**  
[Text Area] **Clear Orders**

**Submit Close**

- 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



Advanced Data Orders - Version 1.2.1.5 (Prd)



 User Name  Borrower(s) **John Homeowner** Loan # 1303000026  
Password  **Mary Homeowner** Closing 1/31/2019  
☒ Save Login Information Advanced Data Closing 1/31/2019



Check Status/Retrieve (800) 537-0458 Update Closing

ITV 4506-T VOE/eVoE SSNV VOA VOD VOM VOR

☐ Order Social Security Number Verification

**1** ☐ **John Homeowner**  
Attach Borrower SSA-89 Form  
**2**   

☐ **Mary Homeowner**  
☐ use borrower PDF for both  
Attach Co-Borrower SSA-89 Form  
  

**3** Copy Email Notifications  
click + to add or X to clear  
  

**4** Submit Close

- 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 Assets

The screenshot shows the 'Advanced Data Orders - Version 1.2.1.5 (Prd)' web application. At the top left is the 'advanced data' logo. To its right are login fields for 'User Name' (containing 'sampleuser') and 'Password' (masked with asterisks), with a 'Save Login Information' checkbox below. Further right, under 'Borrower(s)', are the names 'John Homeowner' and 'Mary Homeowner'. To the right of these are loan details: 'Loan # 1303000026', 'Closing 1/31/2019', and 'Advanced Data Closing 1/31/2019'. Below the login fields is a 'Check Status/Retrieve' button and the phone number '(800) 537-0458'. On the right is an 'Update Closing' button. A navigation bar contains tabs: 'ITV 4506-T', 'VOE/eVoE', 'SSNV', 'VOA', 'VOD', 'VOM', and 'VOR'. The main content area is divided into three sections: 1. 'Order Verification of Assets' with checkboxes for 'John Homeowner' and 'Mary Homeowner'. 2. 'Order Options' with checkboxes for 'VOA Report' and 'Bank Statements'. 3. 'Copy Email Notifications' with a text input field and '+'/'X' buttons. At the bottom right, a '4' icon is next to 'Submit' and 'Close' buttons.

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


## HOW IT WORKS:

### **VOA requires an email address for the borrower.**

When an order is placed, the borrower receives an email with instructions to access a portal where they can link bank accounts to the report.

# Verification of Deposit

Advanced Data Orders - Version 1.2.1.5 (Prd)



 User Name  Borrower(s) **John Homeowner** Loan # 1303000026  
Password  **Mary Homeowner** Closing 1/31/2019  
☒ Save Login Information Advanced Data Closing 1/31/2019

Check Status/Retrieve (800) 537-0458 Update Closing



ITV 4506-T VOE/eVoE SSNV VOA VOD VOM VOR

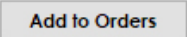
☐ Order Verification of Deposit

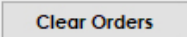
**1** Borrower(s)  
☒ John Homeowner  
☐ Mary Homeowner

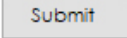

**2** Attach 1006 Form  
  

**3** Notes

**4** Copy Email Notifications  
click + to add or X to clear  
  

**5** Bank Info  
Bank 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 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 - Version 1.2.1.5 (Prd)



 User Name  Borrower(s) **John Homeowner** Loan # 1303000026  
Password  **Mary Homeowner** Closing 1/31/2019  
☒ Save Login Information Advanced Data Closing 1/31/2019

Check Status/Retrieve (800) 537-0458 Update Closing



ITV 4506-T VOE/eVoE SSNV VOA VOD VOM **VOR**

☐ Order Verification of Mortgage

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

**2** Attach Authorization Form  
  

**3** Notes

**4** Copy Email Notifications  
click + to add or X to clear  
  

**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

Advanced Data Orders - Version 1.2.1.5 (Prd)



 User Name  Borrower(s) **John Homeowner** Loan # 1303000026  
Password  **Mary Homeowner** Closing 1/31/2019  
☒ Save Login Information Advanced Data Closing 1/31/2019

Check Status/Retrieve (800) 537-0458 Update Closing



ITV 4506-T VOE/eVoE SSNV VOA VOD VOM **VOR**

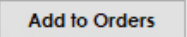
☐ Order Verification of Rental

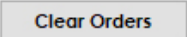
**1** Borrower(s)  
☒ John Homeowner  
☐ Mary Homeowner

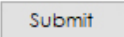

**2** Attach Authorization Form  
  

**3** Notes

**4** Copy Email Notifications  
click + to add or X to clear  
  

**5** Landlord 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 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

The screenshot displays the Advanced Data Message Center interface. At the top right, the 'advanced data' logo is visible, along with a 'User Name' field containing 'user@sa' and a 'Password' field with a masked password. A 'Save' button is also present. Below the logo, a 'Check Status/Retrieve' button is highlighted with a red circle and the number 1. To its right are buttons for 'ITV 4506-T', 'VOE', 'SSNV', 'VOD', 'VOM', and 'VOR'. Below these buttons is a 'Select Year(s)' section with checkboxes for the years 2015, 2014, 2013, and 2012. The main content area is divided into several sections: 'Advanced Data Order Summary', 'ITV 4506-T Orders', 'VOE Orders', 'SSN Orders', 'VOD Orders', 'VOM Orders', and 'VOR Orders'. Each section contains a table with columns for 'Order #', 'Description', 'Date', and 'Status'. In the 'ITV 4506-T Orders' section, the order #211123 is highlighted in green and labeled with a red circle and the number 2. In the 'VOE Orders' section, the order #196865 is highlighted in yellow and labeled with a red circle and the number 3. In the 'SSN Orders' section, the order #118361 is highlighted in green. In the 'VOD Orders' section, the order #10885 is highlighted in green. In the 'VOM Orders' section, the order #211124 is highlighted in green. In the 'VOR Orders' section, the order #211124 is highlighted in green. On the right side of the interface, there are two message detail panels. The top panel is titled 'MESSAGES | ALL ORDERS' and shows a message from 'Advanced Data wrote: RE: Order #196865-VOE (John Homeowner)'. The bottom panel is titled 'MESSAGES | VOE #196865' and shows a message from 'Advanced Data wrote: RE: Order #196865-VOE (John Homeowner)'. Both panels have a 'Check Messages' button. The bottom panel also has a 'New Message' button (labeled with a red circle and the number 4) and a 'View All Messages' button (labeled with a red circle and the number 5). The bottom panel also has a 'Check Messages' button (labeled with a red circle and the number 6).

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

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.