Ordering Transcripts and SSA

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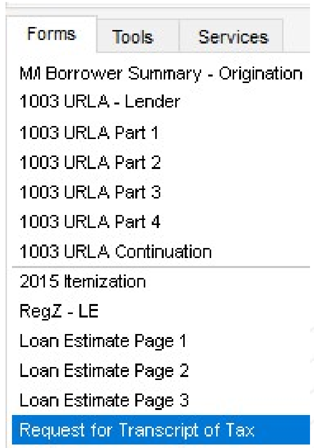
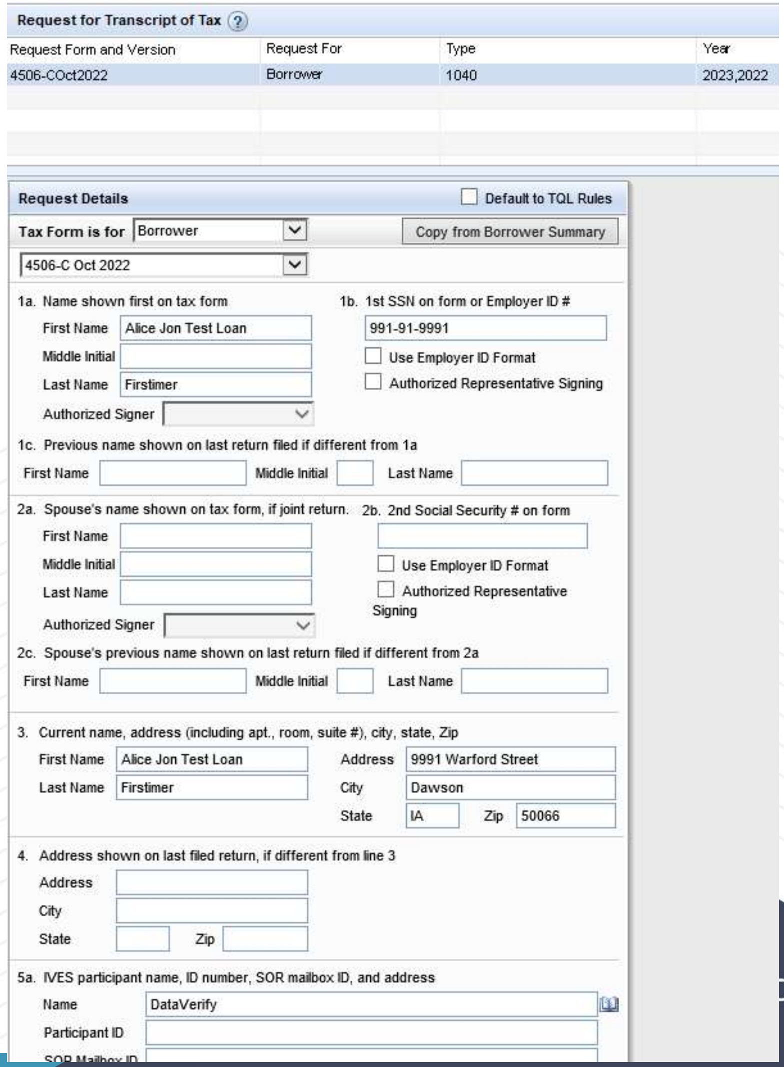
Ordering Transcripts

Start by reviewing the Request for Transcript for Tax screen under Forms.

Press the Copy from Borrower Summary button.

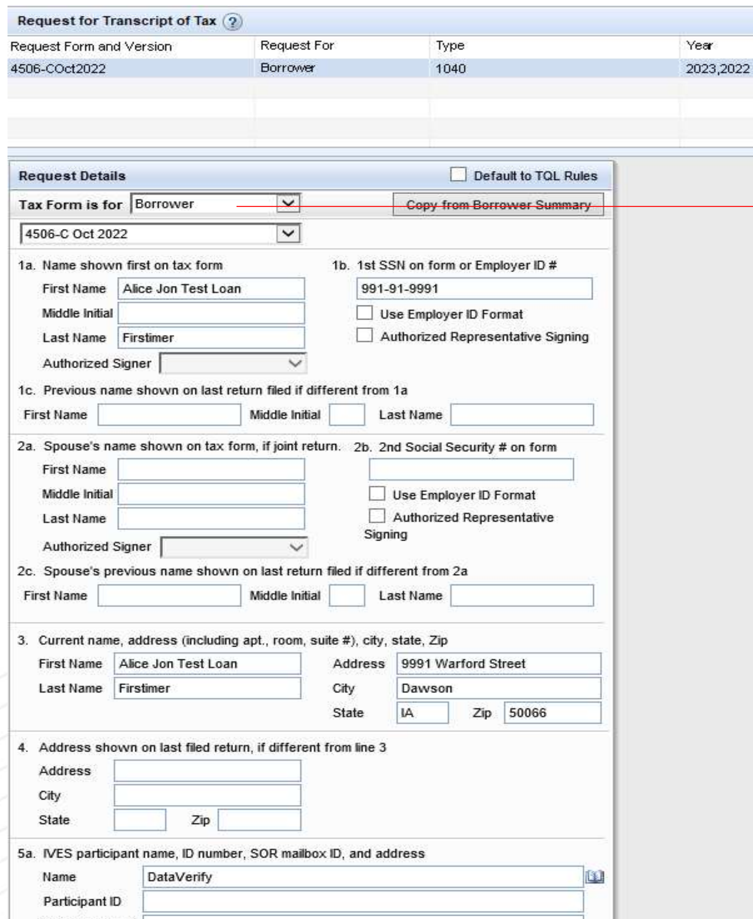


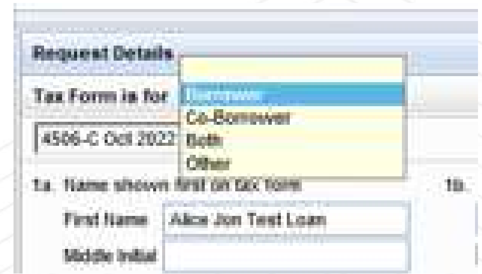


Ordering Transcripts

Once the Copy from Borrower Summary button is pushed, use the dropdown from Tax From is for, to select the borrower. Confirm the information is accurate for the borrower's information and the type/years of transcripts you want.

If you are requesting transcripts for a business, specify the company name and employer identification number on lines 1a and 1b.





Make sure you are checking your information for accuracy. Most returns are due to missed checked boxes, addresses incorrect, or years needed.

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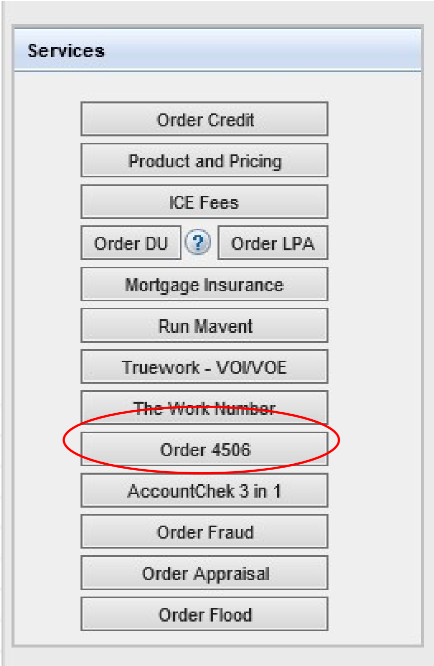
Ordering Transcripts

To start your order for Transcripts, press the Order 4506 button on M/I Borrower Summary – Origination Screen



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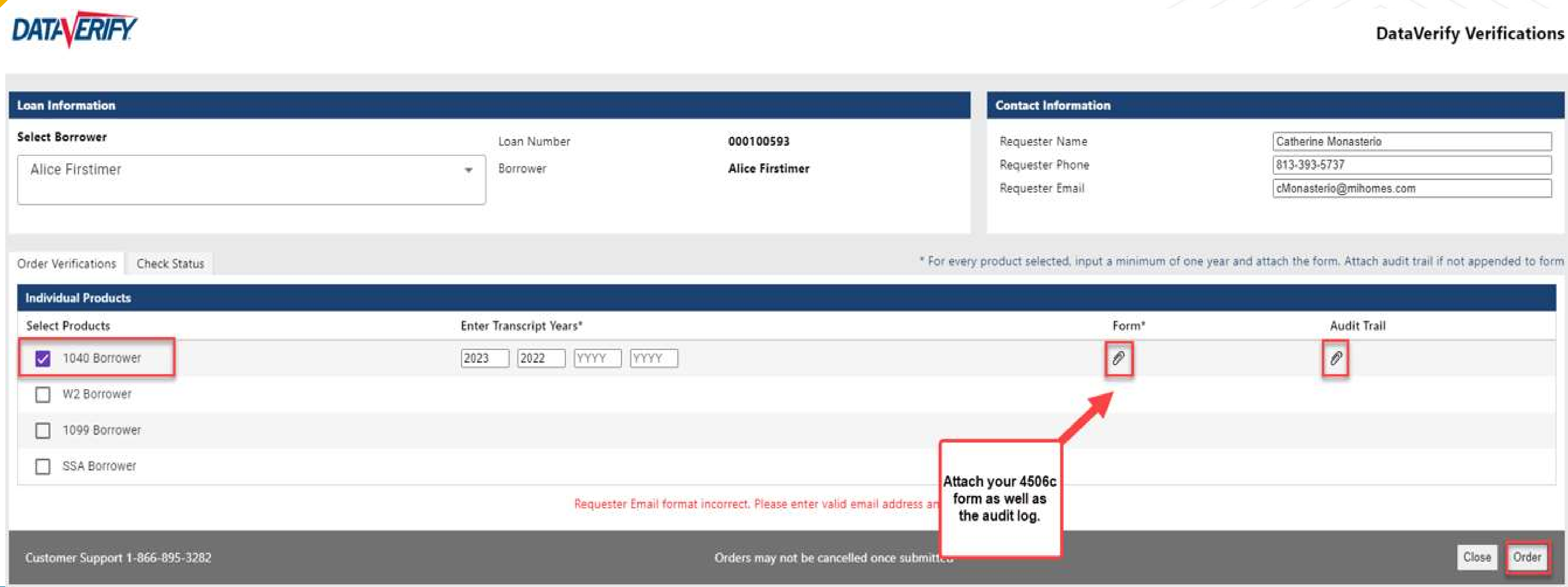
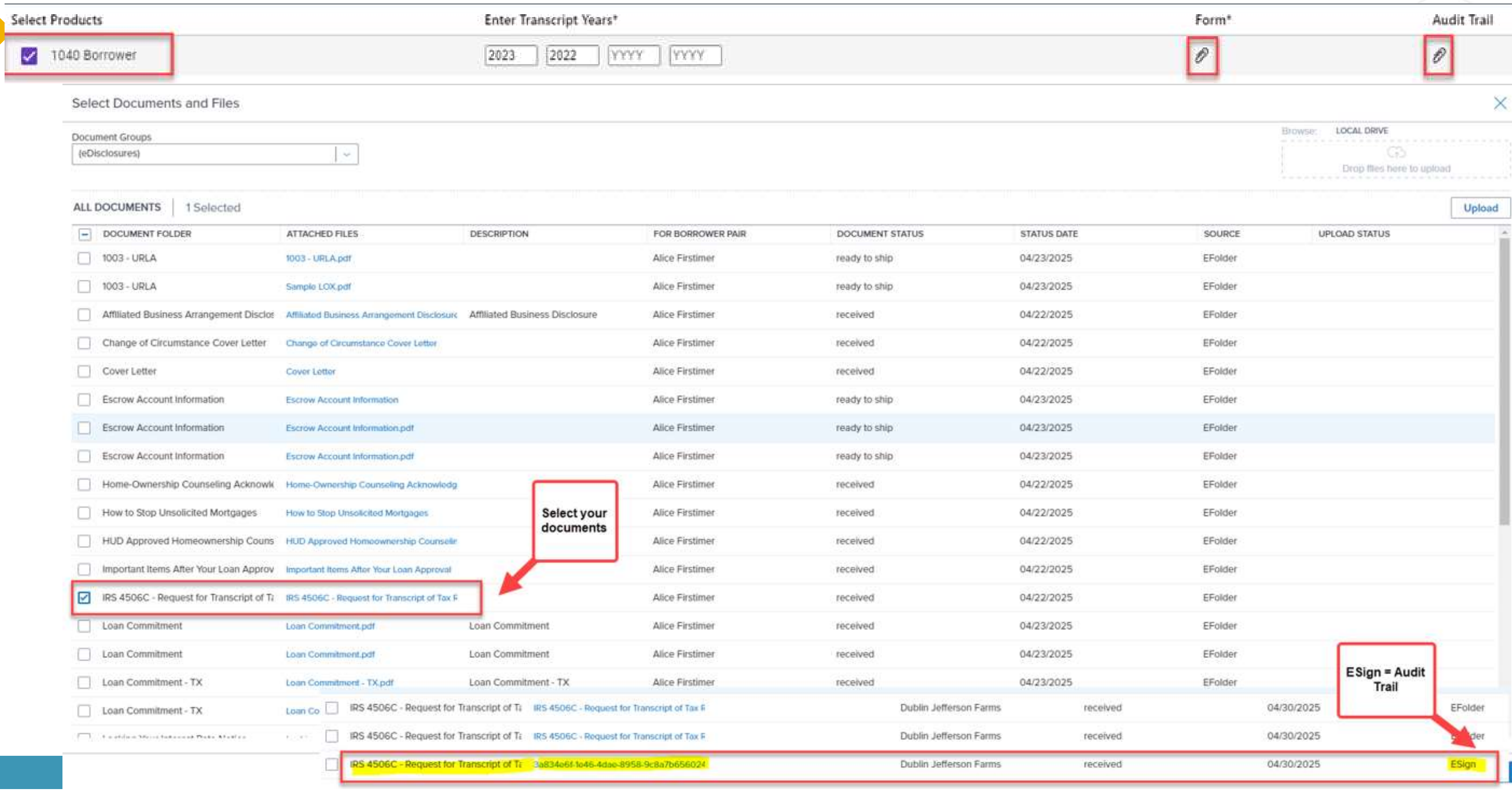
Ordering 4506 Transcripts

The DataVerify screen will open. Select the checkbox next to the desired product. Attach the borrower's 4506C form as well as the esign audit log. Press the paperclip to open the documents to select.



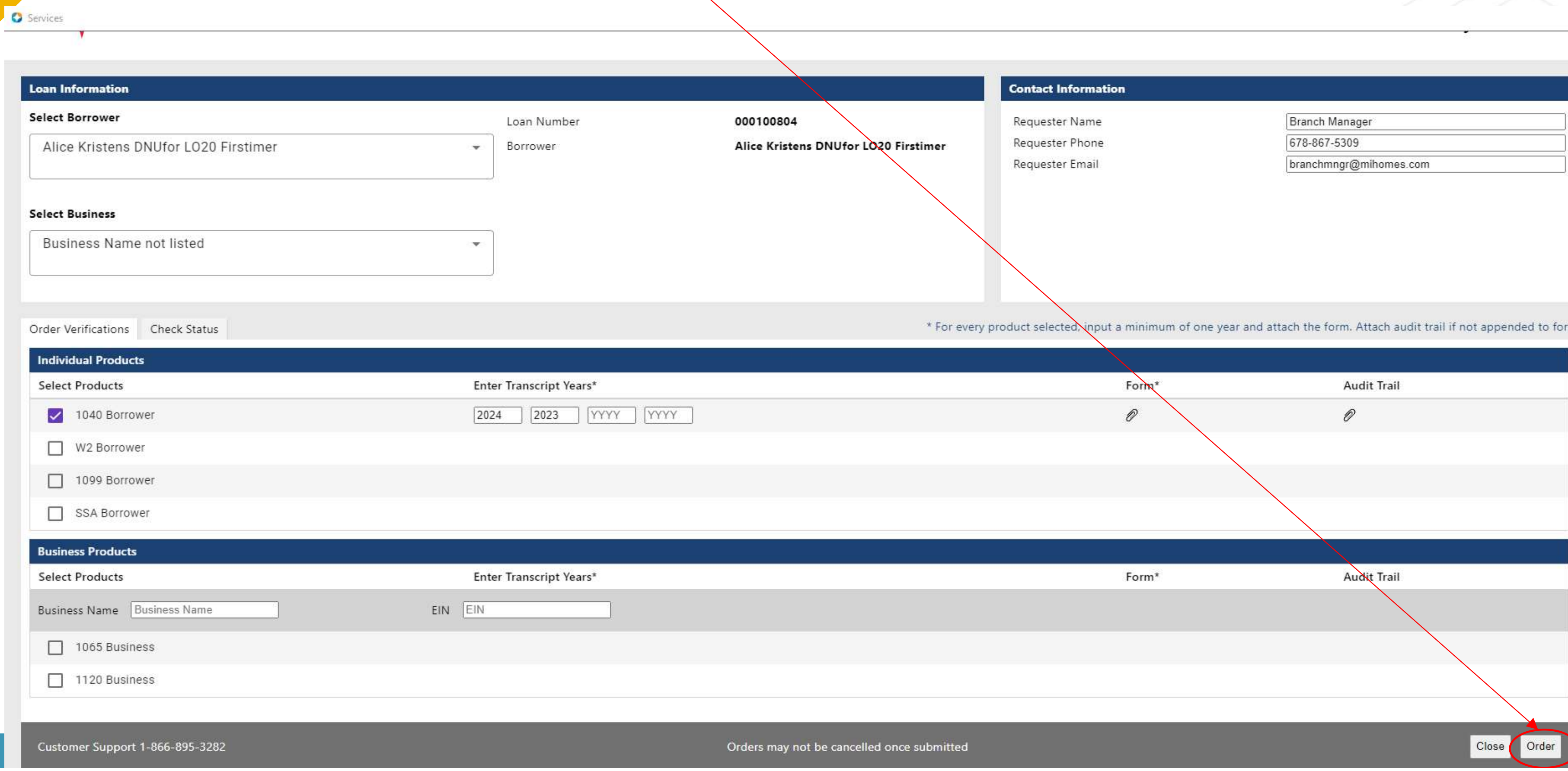
Ordering 4506 Transcripts

When you press the paperclip next to Form, the document files will open for you to select the 4506 and Esign Audit trail form.



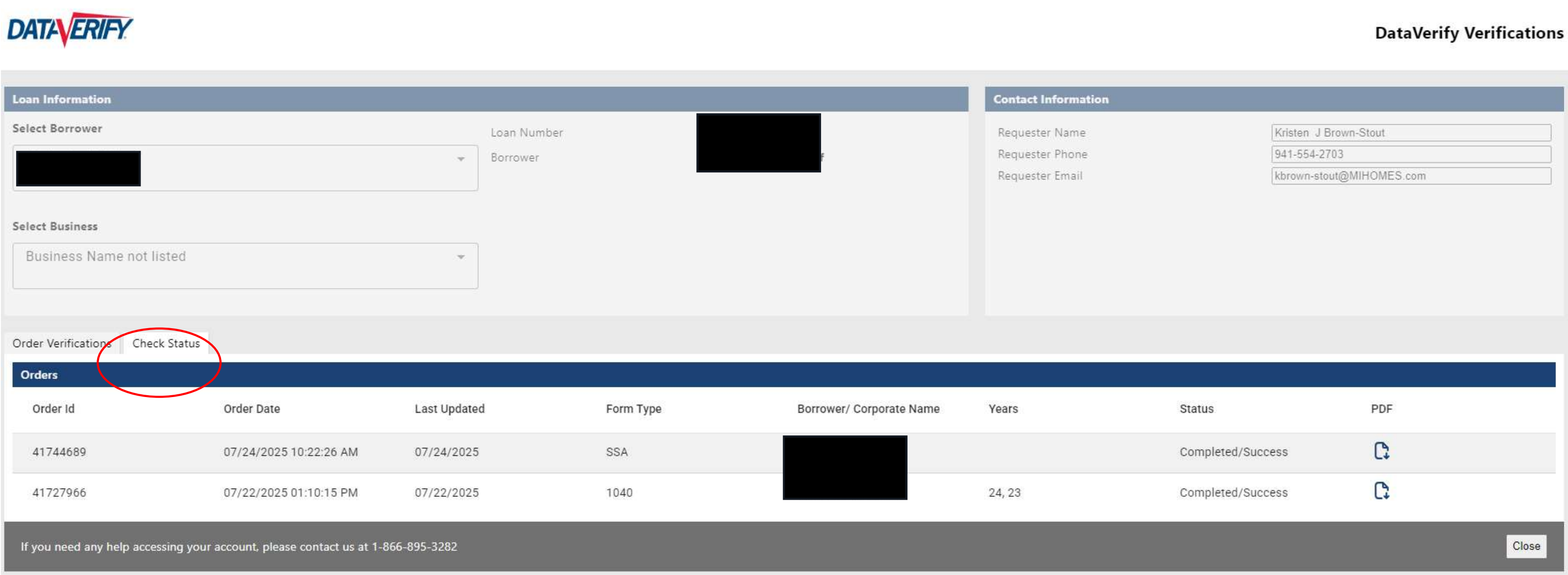
Ordering 4506 Transcripts

Once your documents are attached it will bring you back to the DataVerify screen. Press order at the bottom righthand side of the screen.



Transcripts – Checking Status

If you need to confirm an order is received or in progress, you can search for an order by pressing the Check Status tab.



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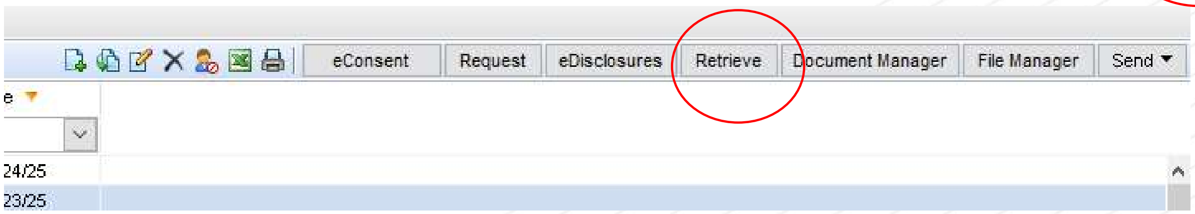
Transcripts – Order Complete

Once the order is complete; you will need to go into the eFolder and press the Retrieve button.
This will bring the document into the eFolder.

Order Id	Order Date	Last Updated	Form Type	Borrower/ Corporate Name	Years	Status
41744689	07/24/2025 10:22:26 AM	07/24/2025	SSA	[redacted]		Completed/Success
41727966	07/22/2025 01:10:15 PM	07/22/2025	1040		24, 23	Completed/Success



Encompass eFolder

eFolder | Documents | Help

Documents | Conditions | Packages | History

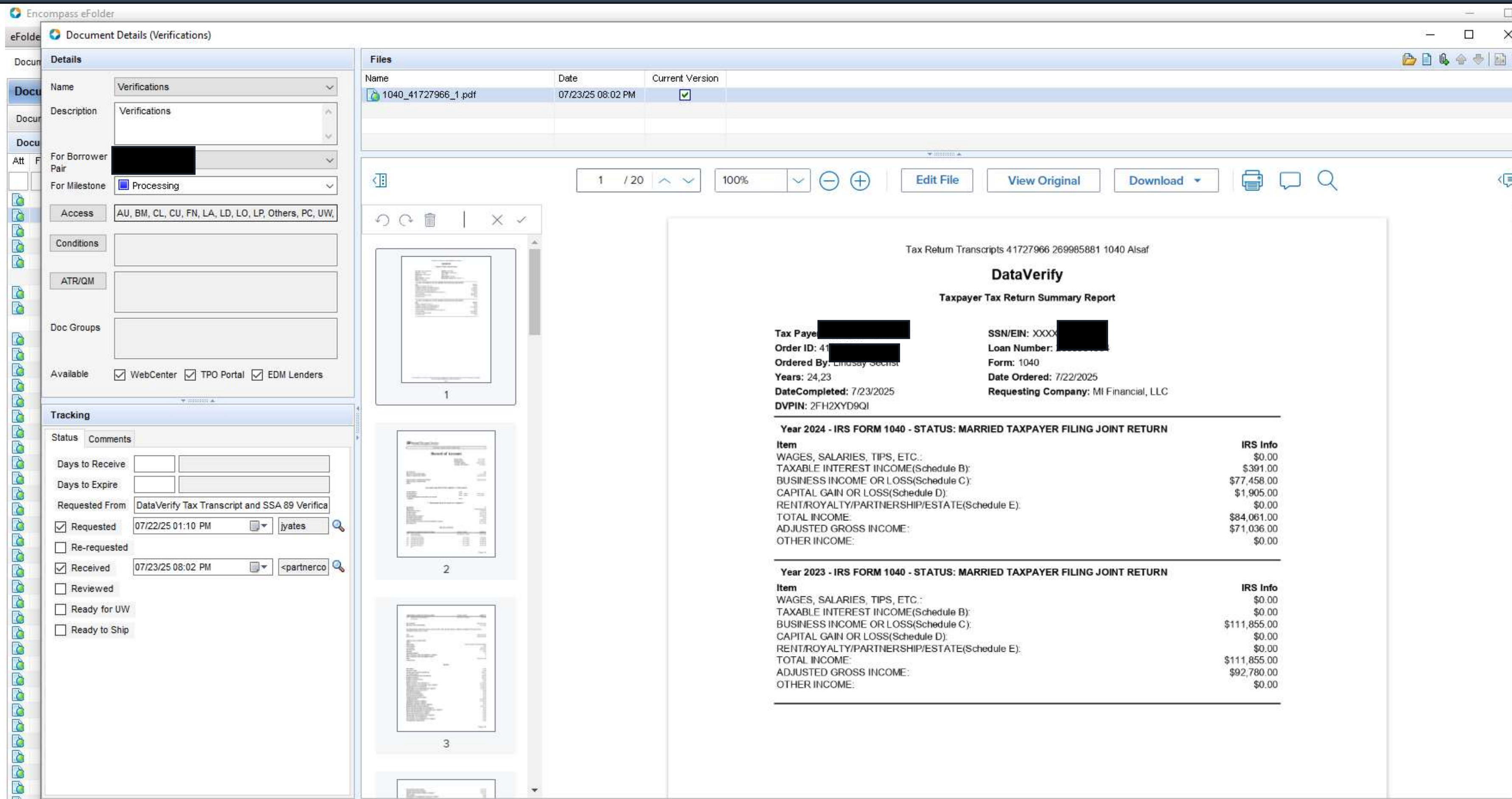
Documents View: Standard View

Document Group: (All Documents) | Stacking Order: None

Documents (72)

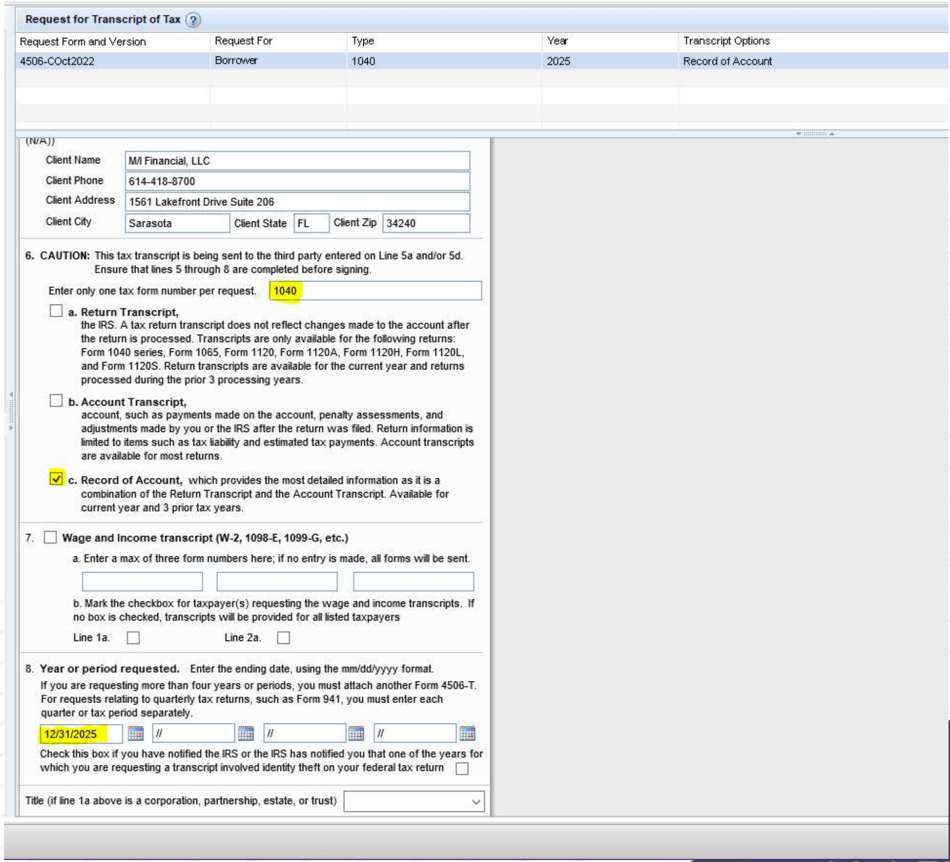
Att	Fo	Name	Description	For Borrower Pair	Type	Access	For Milestone	Status	Date
		Verifications	Verifications	[redacted]	Settlement Service	AU, BM, CL, CU,...	Processing	Received	07/24/25
		Verifications	Verifications		Settlement Service	AU, BM, CL, CU,...	Processing	Received	07/23/25
		Application - Other	BOWTOWN RD PROPERTY SEARCH -...		Needed	AU, BM, CL, CU,...	Processing	Received	07/22/25
		Loan Commitment	Loan Commitment		eDisclosure	AU, BM, CL, CU,...	Processing	Received	07/22/25

The transcripts will be listed under verifications in the eFolder.



Transcripts – Updating Requests

If an updated 4506C is needed to correction information, go into the Request for Transcript and verify your information is updated and correct.



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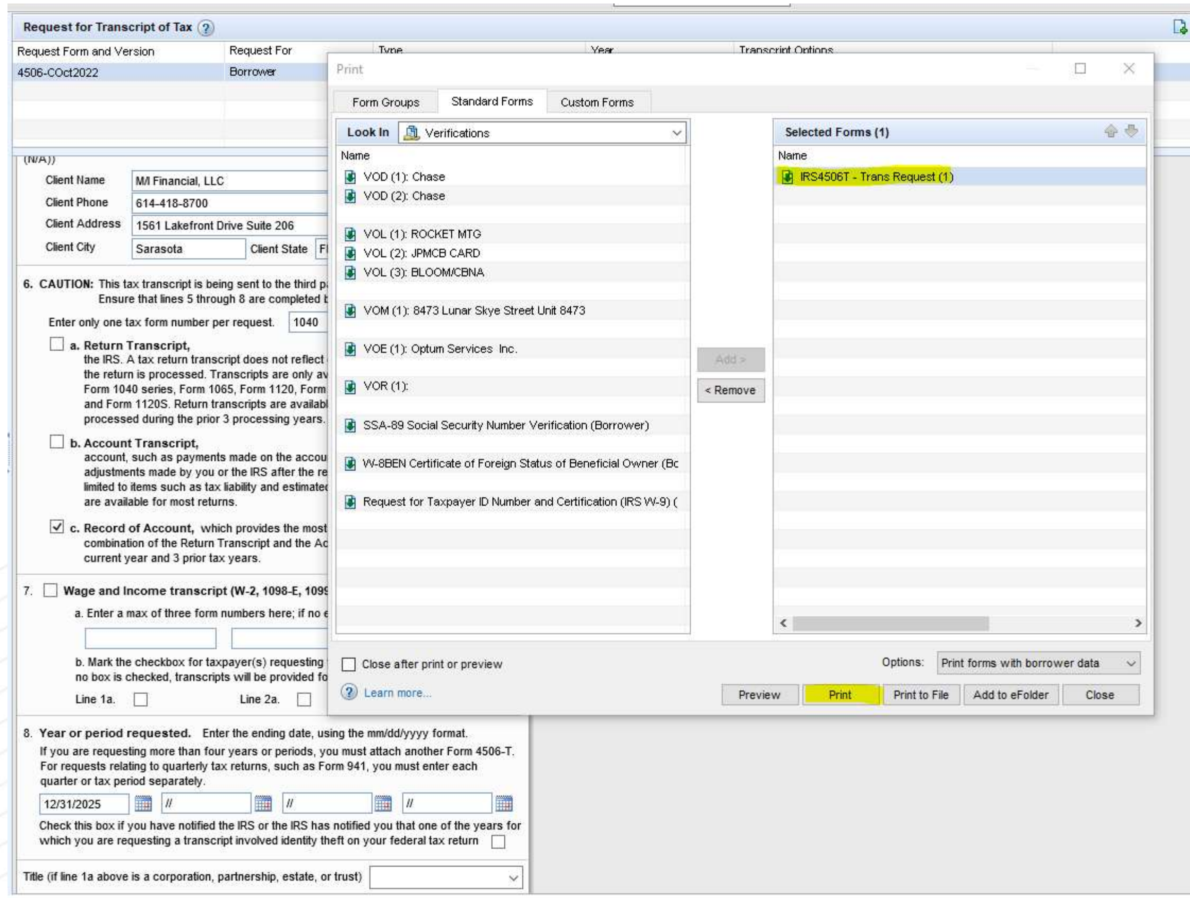
Transcripts – Updating Requests

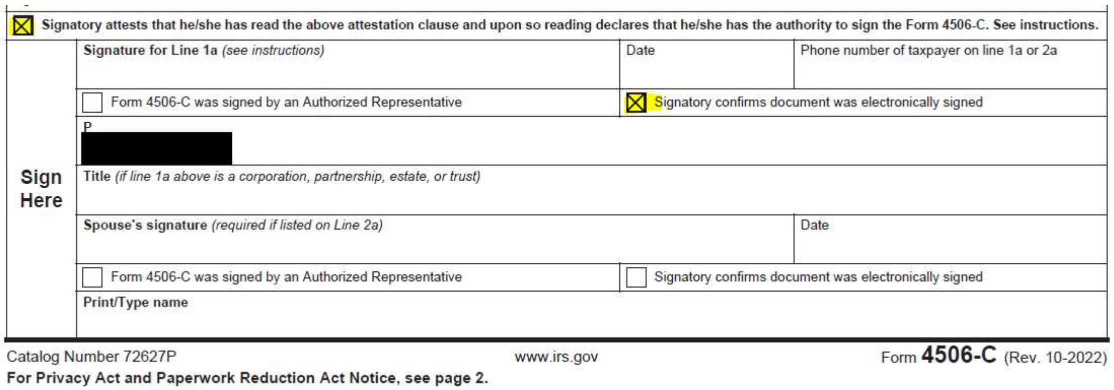
Once information is updated and saved, press the printer icon.
Print, standard forms, select IRS4506T, they are listed as 1 and 2. Select the borrower needed and press print. Save the form as a .PDF.



Transcripts – Updating Requests.

Open the .PDF, add a check mark to the signature area of the 4506C (highlighted areas).

Save the document again. Open up DocuSign, send the entire 4506C to the borrower via DocuSign. Once the form is completed, go back into your sent items in DocuSign and click download.


☒ Signatory attests that he/she has read the above attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See instructions.

Sign Here

Signature for Line 1a *(see instructions)* | Date | Phone number of taxpayer on line 1a or 2a

☐ Form 4506-C was signed by an Authorized Representative | ☒ Signatory confirms document was electronically signed

P [redacted]

Title *(if line 1a above is a corporation, partnership, estate, or trust)*

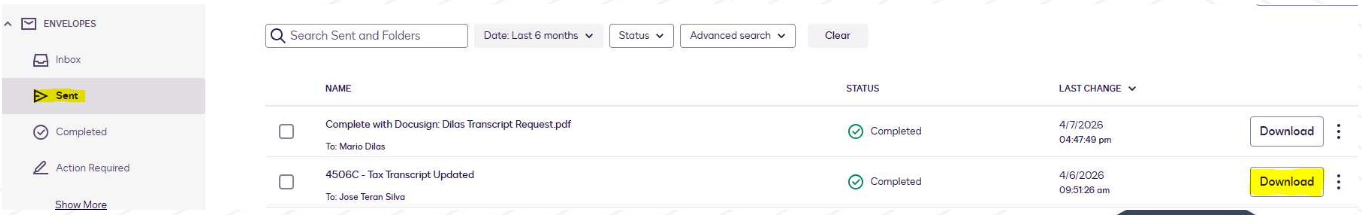
Spouse's signature *(required if listed on Line 2a)* | Date

☐ Form 4506-C was signed by an Authorized Representative | ☐ Signatory confirms document was electronically signed

Print/Type name

Catalog Number 72627P | www.irs.gov | Form **4506-C** (Rev. 10-2022)

For Privacy Act and Paperwork Reduction Act Notice, see page 2.



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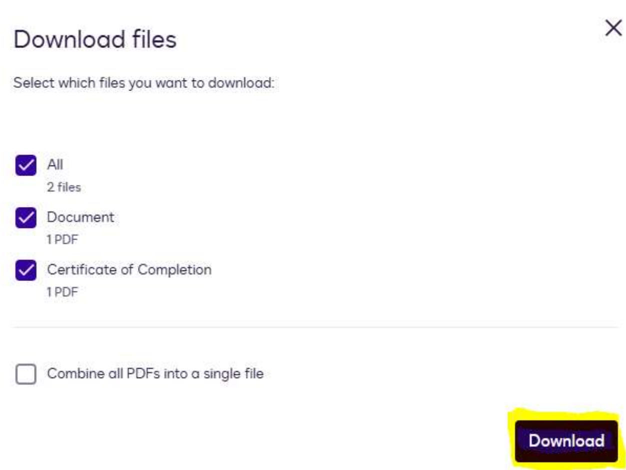
Transcripts – Updating Requests.

Once you download, the three boxes, must be checked to obtain the esign audit log required for submitting the tax transcript request. Click download and a zip file will be created. Click on the zip file and save it to a folder.



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Transcripts – Updating Requests.

Save both documents and upload to Encompass.

Follow the same process as original ordering to complete 4506C process.

Name	Type	Compressed size	Passw
Jose_4506C_Tax_Transcripts_Req...	Adobe Acrobat Document	59 KB	No
Summary	Adobe Acrobat Document	141 KB	No

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Ordering SSA

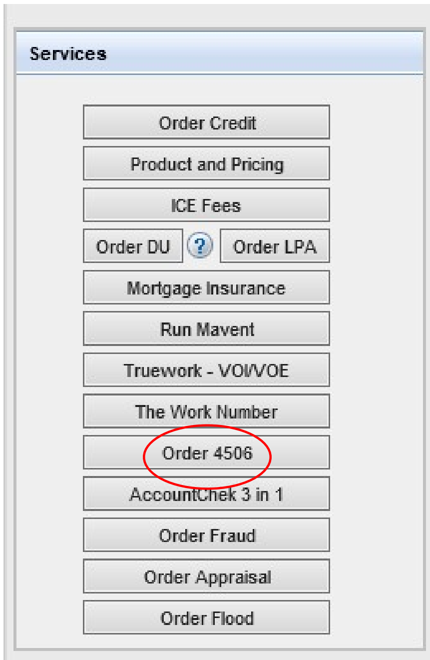
In Services, press Order 4506

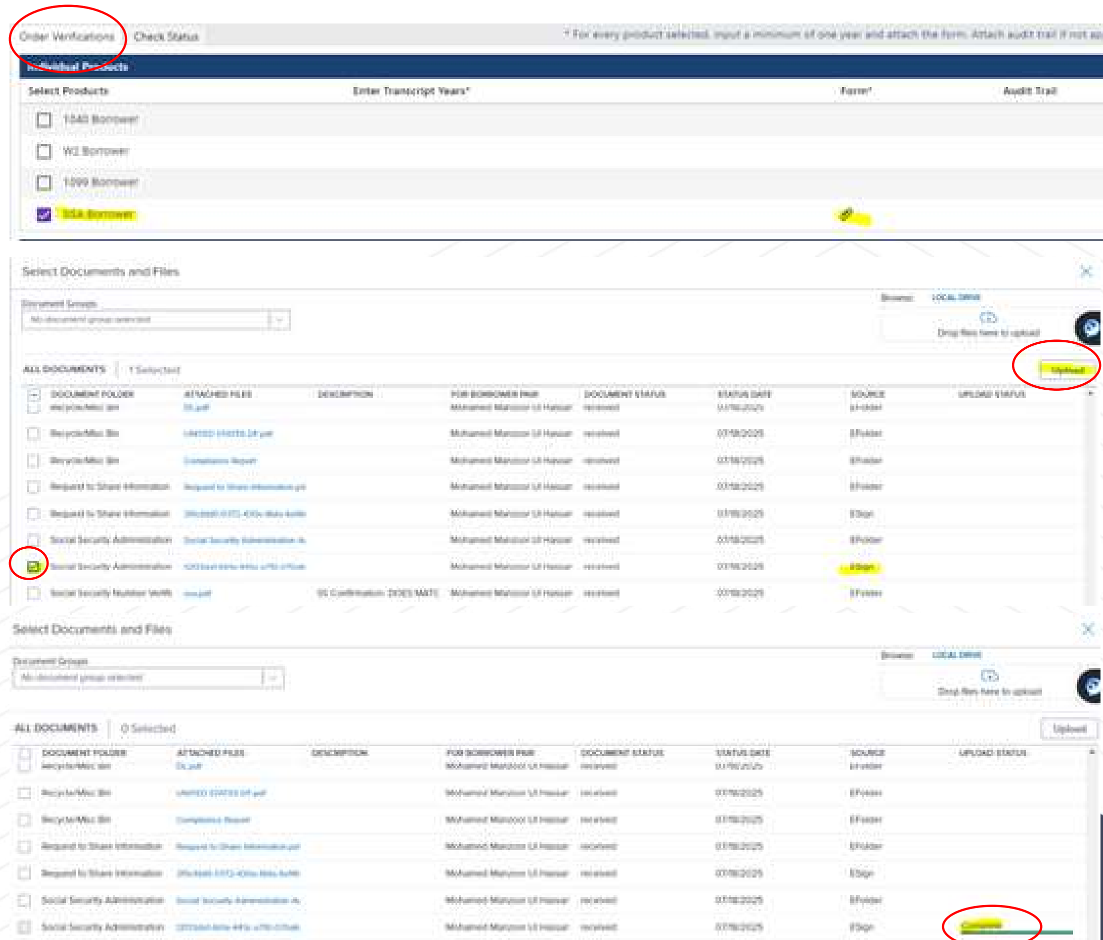
On the Order Verifications Tab, select SSA Borrower.

Click the paperclip under the form area.

In Select Documents, check mark the SSA form with the esign source and click upload.

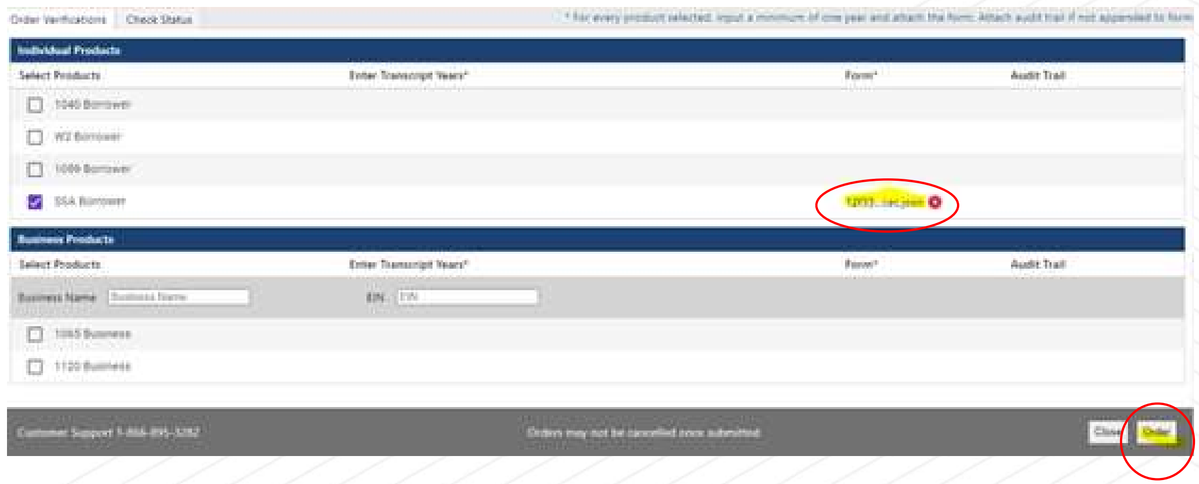
Once upload is complete, click done.





Ordering SSA

You will want to verify the form is uploaded and then click Order.



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Ordering SSA

Once the order is complete; you will need to go into the eFolder and press the Retrieve button.

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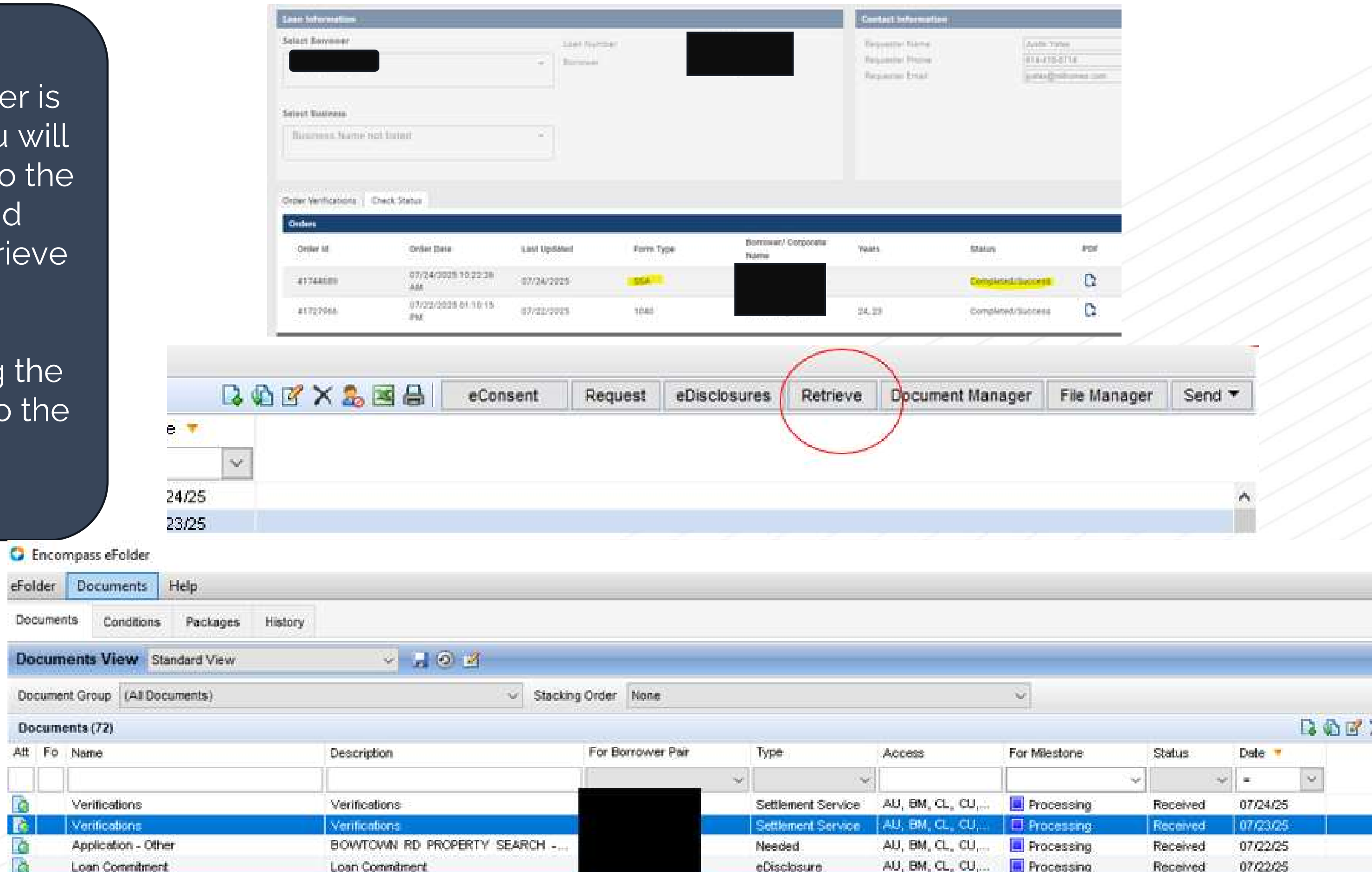
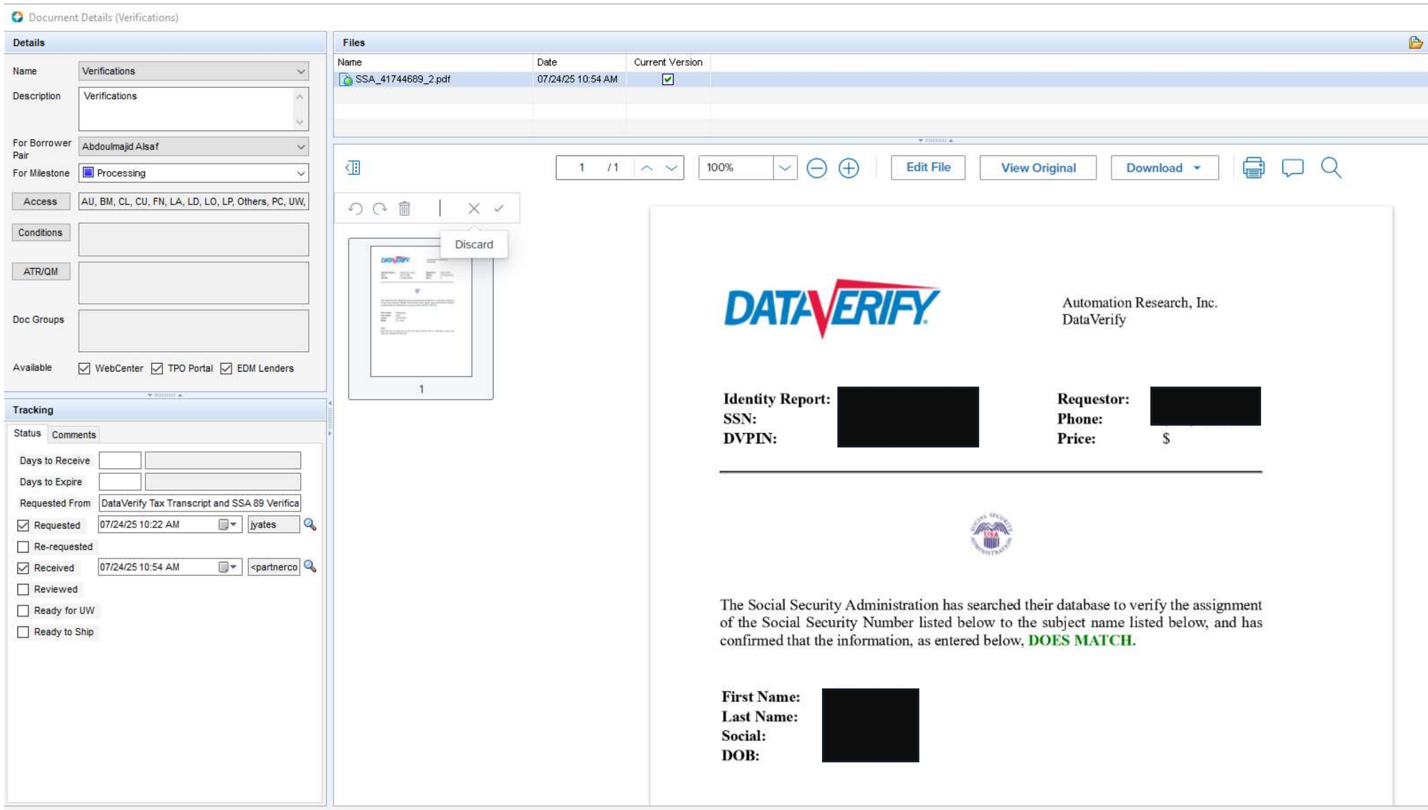


The SSA Document will be listed under verifications in the eFolder.



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M/I TITLE AGENCY

M/I TITLE, LLC

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TransOhio Residential Title

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