

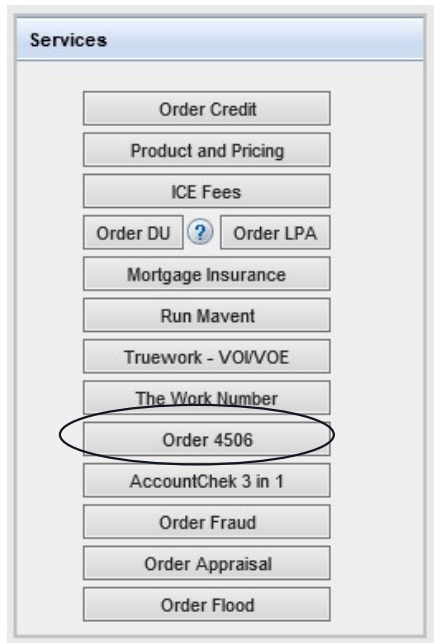


4506 – C DataVerify

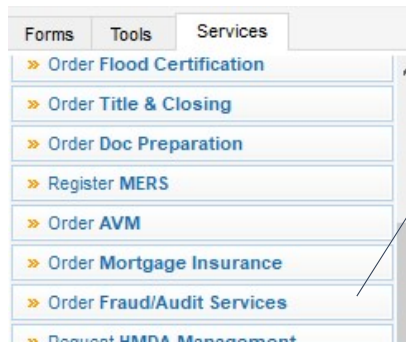


M/I FINANCIAL, LLC
A Subsidiary of M/I Homes, Inc.

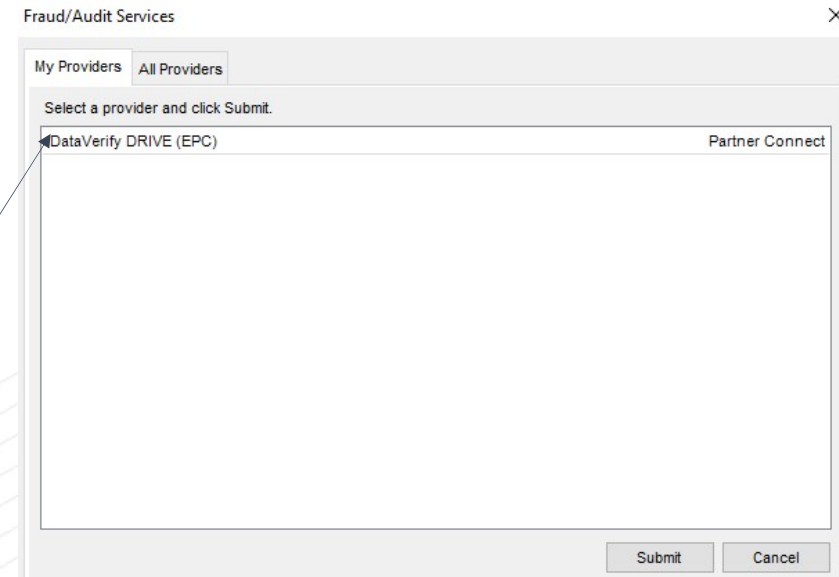
4506 - C



A screenshot of a web application's 'Services' menu. The menu is a vertical list of buttons. The button 'Order 4506' is circled in red. Other buttons include 'Order Credit', 'Product and Pricing', 'ICE Fees', 'Order DU', 'Order LPA', 'Mortgage Insurance', 'Run Mavent', 'Truework - VOI/VOE', 'The Work Number', 'AccountChek 3 in 1', 'Order Fraud', 'Order Appraisal', and 'Order Flood'.



A screenshot of the 'Services' tab in the M/I Borrower Summary. The tab is highlighted in blue. Below the tab, there is a list of services with yellow arrow icons: 'Order Flood Certification', 'Order Title & Closing', 'Order Doc Preparation', 'Register MERS', 'Order AVM', 'Order Mortgage Insurance', 'Order Fraud/Audit Services', and 'Request UMDA Management'.




A screenshot of the 'Fraud/Audit Services' window. The window has a title bar with a close button. Below the title bar, there are two tabs: 'My Providers' and 'All Providers'. The 'My Providers' tab is selected. Below the tabs, there is a text box with the instruction 'Select a provider and click Submit.' and a list of providers. The first provider, 'DataVerify DRIVE (EPC)', is selected with a radio button. To the right of the list, there is a 'Partner Connect' link. At the bottom of the window, there are 'Submit' and 'Cancel' buttons.

For the ordering of tax transcripts, you can access Dataverify through either the services screen on the M/I Borrower Summary or within the Services tab.

Ordering through DataVerify

[Home](#) [Pipeline](#) [Loan](#) [Contacts](#) [Dashboard](#) [Reports](#)

Services



DataVerify Verifications

Loan Information

Select Borrower

Alice Firstimer

Loan Number

000100566

Borrower

Alice Firstimer

Contact Information

Requester Name

Kristen Brown-Stout

Requester Phone

941-554-2703

Requester Email



kbrown-stout@MIHOMES.com

Order Verifications

Check Status

* For every product selected, input a minimum of one year and attach the form. Attach audit trail if not appended to form

Individual Products

Select Products	Enter Transcript Years*	Form*	Audit Trail
<input checked="" type="checkbox"/> 1040 Borrower	<div>2023</div> <div>2022</div> <div>YYYY</div> <div>YYYY</div>		
<input type="checkbox"/> W2 Borrower			
<input type="checkbox"/> 1099 Borrower			
<input type="checkbox"/> SSA Borrower			

Customer Support 1-866-895-3282

Orders may not be cancelled once submitted

Close

Order

Both the order 4506 or order Fraud/Audit services will bring you to the DataVerify system in order to complete a 4506 request.



M/I FINANCIAL, LLC
A Subsidiary of M/I Homes, Inc.

Ordering through DataVerify

Order Verifications | Check Status | * For every product selected, input a minimum of one year and attach the form. Attach audit trail if not appended to form

Individual Products

Select Products	Enter Transcript Years*	Form*	Audit Trail
<input checked="" type="checkbox"/> 1040 Borrower	2023 2022 YYYY YYYY		

You can check or add additional forms to the order through the Form attachment by clicking on the paperclip. You can also update the transcript years in this screen and place your order.

Select Documents and Files

Document Groups
No document group selected

ALL DOCUMENTS | 0 Selected

DOCUMENT FOLDER	ATTACHED FILES	DESCRIPTION	FOR BORROWER PAIR	DOCUMENT STATUS	STATUS DATE	SOURCE	UPLOAD STATUS
<input type="checkbox"/> Credit Report	Credit Report	Credit Report	Alice Jon Test Loan Firsttimer	received	04/09/2025	EFolder	
<input type="checkbox"/> Other Services	44872a4d-5a0e-4254-868c-3bc4f0694ffc	Additional Services	All	received	04/09/2025	EFolder	
<input type="checkbox"/> Other Services	7e6ee93a-0e9b-4d48-b3c0-ec4a98a246a	Additional Services	All	received	04/09/2025	EFolder	
<input type="checkbox"/> Other Services	64807d-08-d-4540-07ac-6775-7447-6	Additional Services	All	received	04/09/2025	EFolder	

Browse: LOCAL DRIVE

Drop files here to upload

Upload

Ordering through Dataverify

Press the Check Status tab to get an update on your order.



DataVerify Verifications

Loan Information				Contact Information			
Select Borrower		Loan Number	000100566	Requester Name		Kristen Brown-Stout	
Alice Firstimer		Borrower	Alice Firstimer	Requester Phone		941-554-2703	
				Requester Email		kbrown-stout@MIHOMES.com	
Order Verifications				Check Status			
Orders							
Order Id	Order Date	Last Updated	Form Type	Borrower/ Corporate Name	Years	Status	PDF
If you need any help accessing your account, please contact us at 1-866-895-3282							

Close

Request for Transcript Tax Form

You can update the tax transcript tax form with the most recent information, so your request can be the most accurate. Under Request Details, you can select which borrowers you want to update the information for.

Forms Tools Services

MM Borrower Summary - Origination
1003 URLA - Lender
1003 URLA Part 1
1003 URLA Part 2
1003 URLA Part 3
1003 URLA Part 4
1003 URLA Continuation
2015 Itemization
RegZ - LE
Loan Estimate Page 1
Loan Estimate Page 2
Loan Estimate Page 3
Request for Transcript of Tax

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

Request for Transcript of Tax ?

Request Form and Version	Request For	Type	Year
4506-C Oct 2022	Borrower	1040	2023, 2022

Request Details

☐ Default to TQL Rules

Tax Form is for: Borrower ☒ Copy from Borrower Summary

4506-C Oct 2022

1a. Name shown first on tax form

First Name: Alice Jon Test Loan
Middle Initial:
Last Name: Firstimer
Authorized Signer:
1b. 1st SSN on form or Employer ID #
991-91-9991
☐ Use Employer ID Format
☐ Authorized Representative Signing

1c. Previous name shown on last return filed if different from 1a
First Name:
Middle Initial:
Last Name:
2a. Spouse's name shown on tax form, if joint return: 2b. 2nd Social Security # on form
First Name:
Middle Initial:
Last Name:
☐ Use Employer ID Format
☐ Authorized Representative Signing

2c. Spouse's previous name shown on last return filed if different from 2a
First Name:
Middle Initial:
Last Name:
3. Current name, address (including apt., room, suite #), city, state, Zip
First Name: Alice Jon Test Loan Address: 9991 Warford Street
Last Name: Firstimer City: Dawson
State: IA Zip: 50066

4. Address shown on last filed return, if different from line 3
Address:
City:
State:
Zip:
5a. IVES participant name, ID number, SOR mailbox ID, and address
Name: DataVerify
Participant ID:
SOR Mailbox ID:
Request Details

Tax Form is for: Borrower
4506-C Oct 2022

1a. Name shown first on tax form
First Name: Alice Jon Test Loan
Middle Initial:
1b.
1c.
2a.
2b.
2c.
3.
4.
5a.
5b.
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5e.
5f.
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5ck.
5cl.
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5co.
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Sending a Revised 4506 Request

When you need to send out a revised 4506C, it's recommended to generate a new copy and have the customer esign it via docusign (outside of encompass).

This way you can have the esigned doc + docusign certificate (aka audit trail) to send to DataVerify for transcript requests.

To generate a new copy:
Go to Forms > Request for Transcript of Tax.
Click the Copy from Borrower Summary button to generate the customer's correct data from the application.
Click the Printer icon.

Result: the forms will automatically be in the Standard Forms of the Print group. Preview for accuracy or Print to PDF and save the document outside of encompass.

Optional - you can add an unsigned copy to the efolder to reflect you updated the form pending borrower(s) esignature(s)

The screenshot displays the 'Request for Transcript of Tax' application. The main window shows 'Request Details' for a 'Borrower' request for the year 2022. The 'Tax Form is for' is set to 'Borrower' and the 'Request Form and Version' is '4506-C Oct 2022'. The 'Requester' is 'Borrower' and the 'CoBorrower' is 'CoBorrower'. The 'Request Details' section includes fields for '1a. Name shown first on tax form' (First Name: Izziel, Middle Initial: , Last Name: Brookman, Authorized Signer:), '1c. Previous name shown on last return filed if different from' (First Name: , Middle Initial:), '2a. Spouse's name shown on tax form, if joint return' (First Name: , Middle Initial: , Last Name: , Authorized Signer:), '2b. Spouse's previous name shown on last return filed if different from' (First Name: , Middle Initial: , Last Name: , Authorized Signer:), and '3. Current name, address (including apt., room, suite #), city' (First Name: Izziel, Last Name: Brookman, City: , State:).

The 'Print' window is open, showing a list of 'Selected Forms (2)'. The forms are 'IRS4506T - Trans Request (1)' and 'IRS4506T - Trans Request (2)'. The 'Look In' dropdown is set to 'Verifications'. The list of forms includes: VOD (1): Charles Schwab, VOD (2): Charles Schwab, VOD (3): Charles Schwab, VOD (4): Charles Schwab, VOD (5): Charles Schwab, VOL (1): JPMCB CARD, VOL (2): TBL, VOL (3): DISCOVERCARD, VOL (4): DEPT OF ED/AIDVANTAGE, VOL (5): DEPT OF ED/AIDVANTAGE, VOL (6): DEPT OF ED/AIDVANTAGE, VOL (7): DPT ED/AIDV, VOL (8): DEPT OF ED/AIDVANTAGE, VOL (9): DEPT OF ED/AIDVANTAGE, VOL (10): DEPT OF ED/AIDVANTAGE, VOL (11): DPT ED/AIDV, VOL (12): CITI, VOL (13): DEPT OF ED/AIDVANTAGE, VOL (14): DEPT OF ED/AIDVANTAGE, VOL (15): DEPT OF ED/AIDVANTAGE, VOL (16): DEPT OF ED/AIDVANTAGE, VOL (17): FIRST FEDERAL CREDIT C, and VOL (18): DEPT OF ED/AIDVANTAGE. The 'Options' section at the bottom has 'Print forms with borrower data' selected. The 'Preview' and 'Print' buttons are highlighted with red boxes.



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