

4506 – C

DataVerify



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

4506 - C

Services

- Order Credit
- Product and Pricing
- ICE Fees
- Order DU  Order LPA
- Mortgage Insurance
- Run Mavent
- Truework - VOI/VOE
- The Work Number
- Order 4506** 
- AccountChek 3 in 1
- Order Fraud
- Order Appraisal
- Order Flood

Forms Tools Services

- » Order Flood Certification
- » Order Title & Closing
- » Order Doc Preparation
- » Register MERS
- » Order AVM
- » Order Mortgage Insurance
- » Order Fraud/Audit Services
- » Document UMDA Management

Fraud/Audit Services

My Providers All Providers

Select a provider and click Submit.

 DataVerify DRIVE (EPC)

Partner Connect

Submit Cancel

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.



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Ordering through DataVerify

Home Pipeline Loan Contacts Dashboard Reports

Services

DATAVERIFY

DataVerify Verifications

Loan Information

Select Borrower: Alice Firsttimer

Loan Number: 000100566

Borrower: Alice Firsttimer

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: 1040 Borrower (checked), W2 Borrower, 1099 Borrower, SSA Borrower

Enter Transcript Years*: 2023, 2022, YYYY, YYYY

Form*:

Audit Trail:

Customer Support 1-866-895-3282

Orders may not be cancelled once submitted

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



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

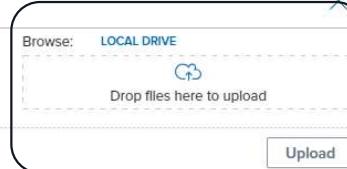
You can check or add additional forms to the order through the Form attachment by clicking on the paperclip. You can also update the transcript years in this screen and place your order.

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-3bc4f0694f1c	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	14807010-0000-4E40-8500-000000000000	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

Select Borrower	Loan Number	
Alice Firsttimer		000100566
	Borrower	Alice Firsttimer

Contact Information

Requester Name	Kristen Brown-Stout
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



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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 4506-C Oct2022	Request For Borrower	Type 1040	Year 2023,2022
Request Details			
Tax Form is for Borrower <input type="checkbox"/> Default to TQL Rules		<input type="checkbox"/> Copy from Borrower Summary	
4506-C Oct 2022			
1a. Name shown first on tax form		1b. 1st SSN on form or Employer ID #	
First Name	Alice Jon Test Loan	991-91-9991	<input type="checkbox"/> Use Employer ID Format
Middle Initial			<input type="checkbox"/> Authorized Representative Signing
Last Name	Firsttimer		
Authorized Signer			
1c. Previous name shown on last return filed if different from 1a			
First Name		Middle Initial	<input type="checkbox"/>
			Last Name
2a. Spouse's name shown on tax form, if joint return.		2b. 2nd Social Security # on form	
First Name			<input type="checkbox"/> Use Employer ID Format
Middle Initial			<input type="checkbox"/> Authorized Representative Signing
Last Name			
Authorized Signer			
2c. Spouse's previous name shown on last return filed if different from 2a			
First Name		Middle Initial	<input type="checkbox"/>
			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	Firsttimer	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			

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



Sending a Revised 4506 Request

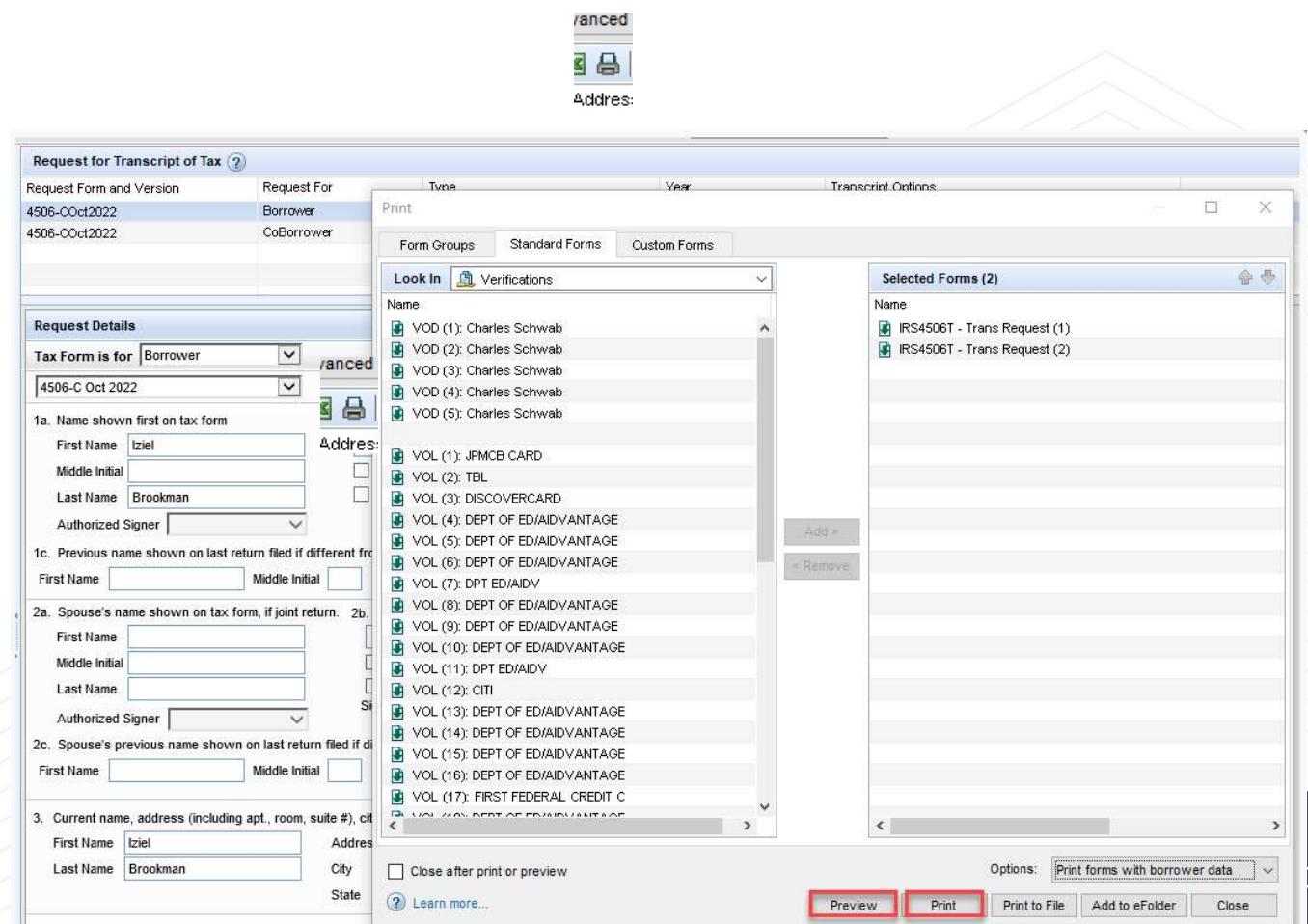
When you need to send out a revised 4506C, it's recommended to generate a new copy and have the customer esign it via docusign (outside of encompass).

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 shows the 'Request for Transcript of Tax' dialog box in the Encompass application. The 'Print' tab is selected. The 'Selected Forms' group on the right contains two entries: 'IRS4506T - Trans Request (1)' and 'IRS4506T - Trans Request (2)'. The 'Print' button at the bottom is highlighted with a red box.



M/I TITLE AGENCY



M/I TITLE, LLC



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TransOhio Residential Title



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