Requesting 4506T

(Revised 06/30/2017)

↩ Reply   ↩ Reply All   ↪ Forward

Fri 6/30/2017 2:04 PM

Lauren Hoppin

Serna, J Jesus; New Task: TM - 4506T Request for Processing

To   Andrea Olson

Cc   Michael Alexander

File name: 7008700

Notes: There are 2 forms. Please see if one is more clear than the other for processing.
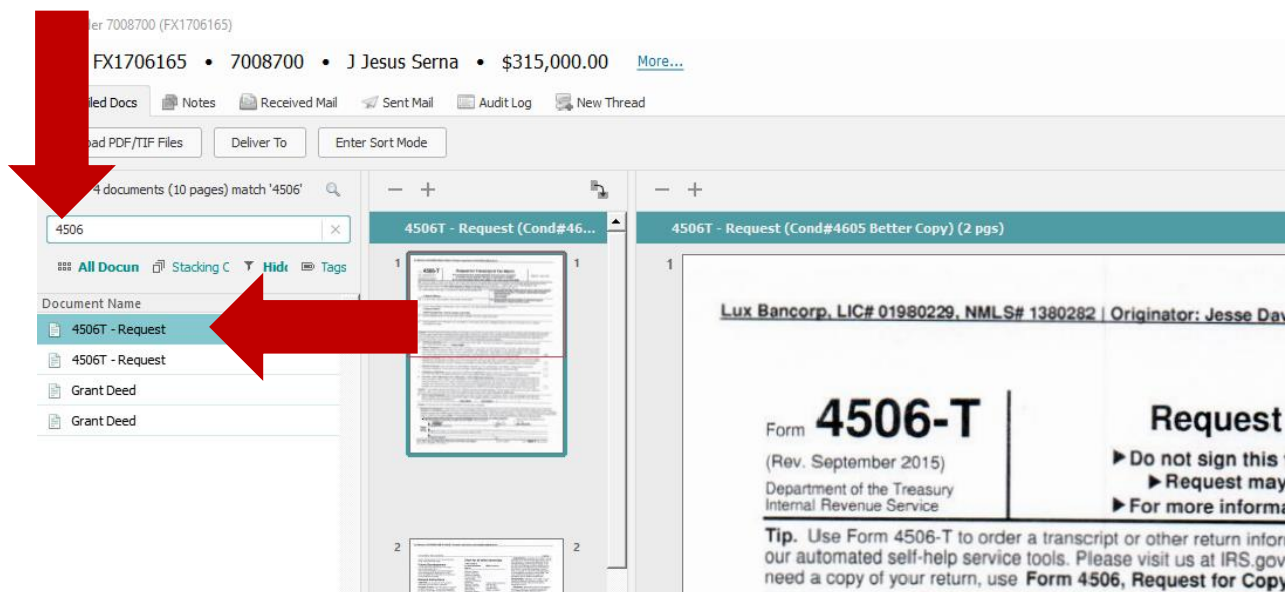
You will receive a task email from the TM requesting to order 4506T.

From the home screen of Doc Velocity, enter the loan number into SEARCH FOLDERS and hit enter.

The file will pop up highlighted in green, double click to open.

Enter "4506" into SEARCH FOR DOCUMENTS and you will pull up the 4506T – Request.

Click on 4506T – Request once to pull up the document. Verify the document is fully completed to refrain from having to repeat the process **(refer to example of fully executed form)**.

Right click on 4506T – Request and SAVE DOCUMENT(s) AS PDF. Save to your desktop.

<mark>NOTE: MUST UPLOAD PAGE 1 AND PAGE 2 (even though Page 2 is informational only). INFORMATIVE RESEACRH WILL NOT ACCEPT ONLY 1 PAGE.</mark>
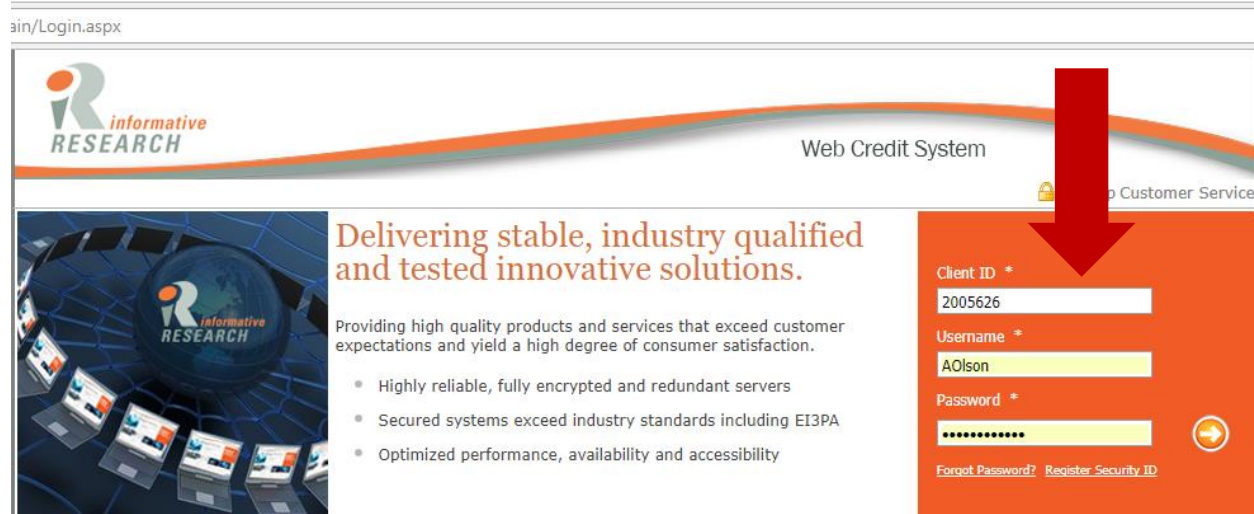
Using Google Chrome (or desired search engine), log into your Informative Research account.
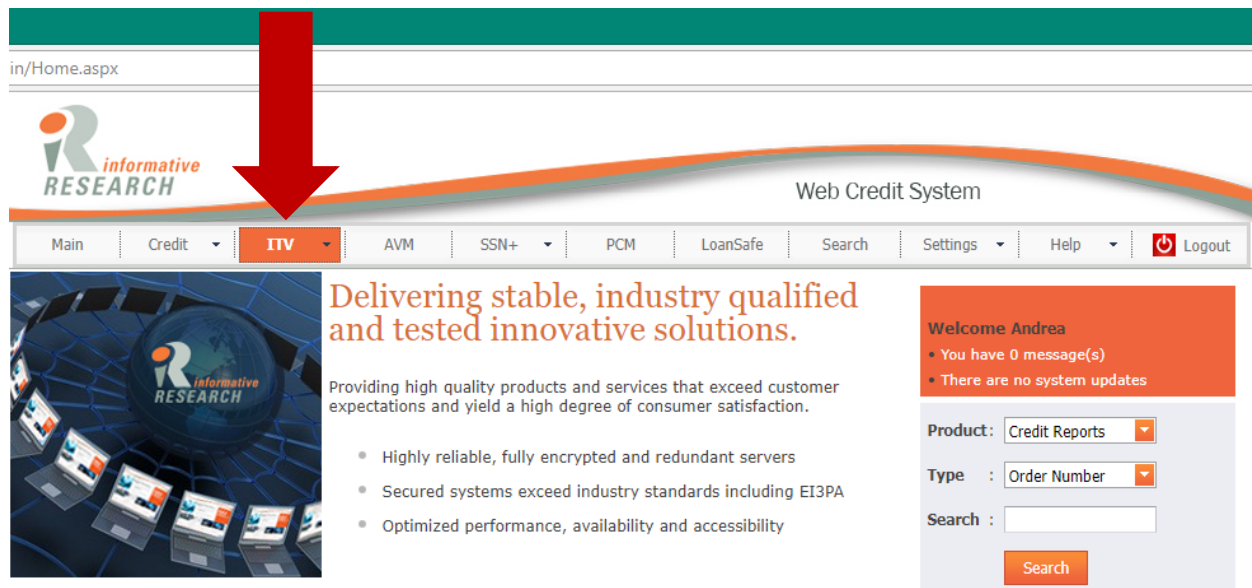
This is your home page for Informative Research. Click on the dropdown labeled ITV and choose ORDER ITV REPORT.

Be sure to leave form pulled up in Doc Velocity so you can appropriately fill out the information and click ADD TO CART.

It will show up under ITV ORDER SUMMARY. Click the box to add a checkmark and click ORDER.

Highlight and right click on "Order 1001529032ITV has been submitted successfully" to COPY.
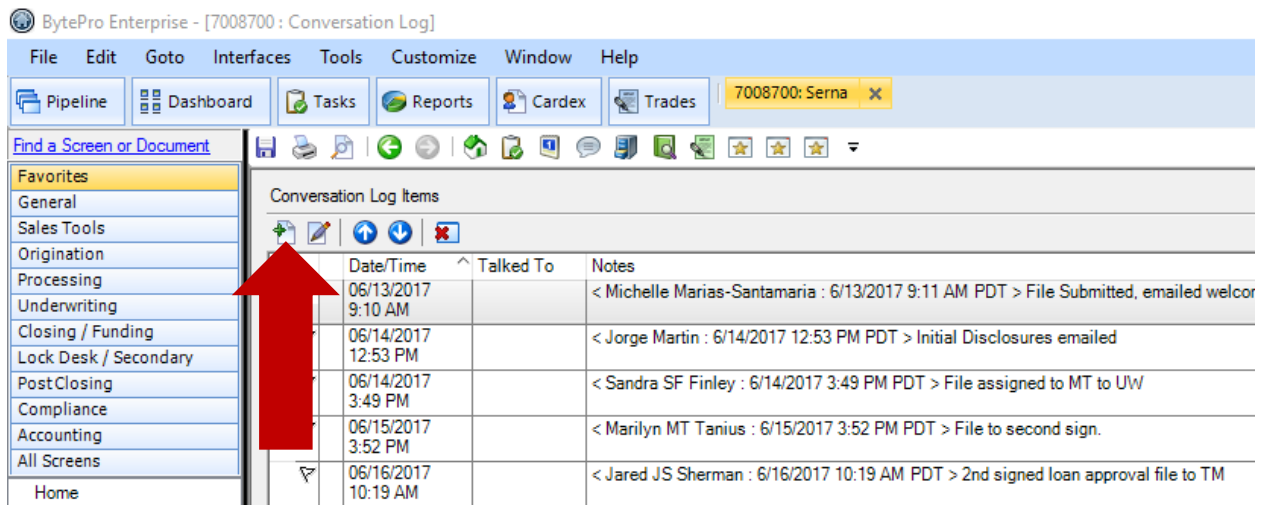
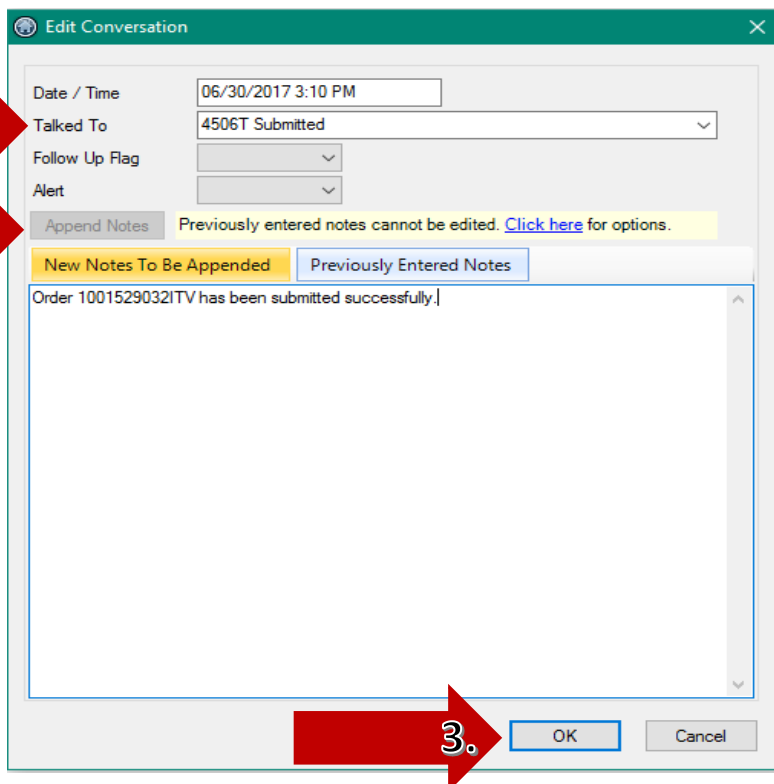From the home screen of Byte Pro, enter the loan number in FILE NAME and click SEARCH.

Double click on file to open.

Click on the "Thought Cloud" sub-icon to go to the Conversation Log.

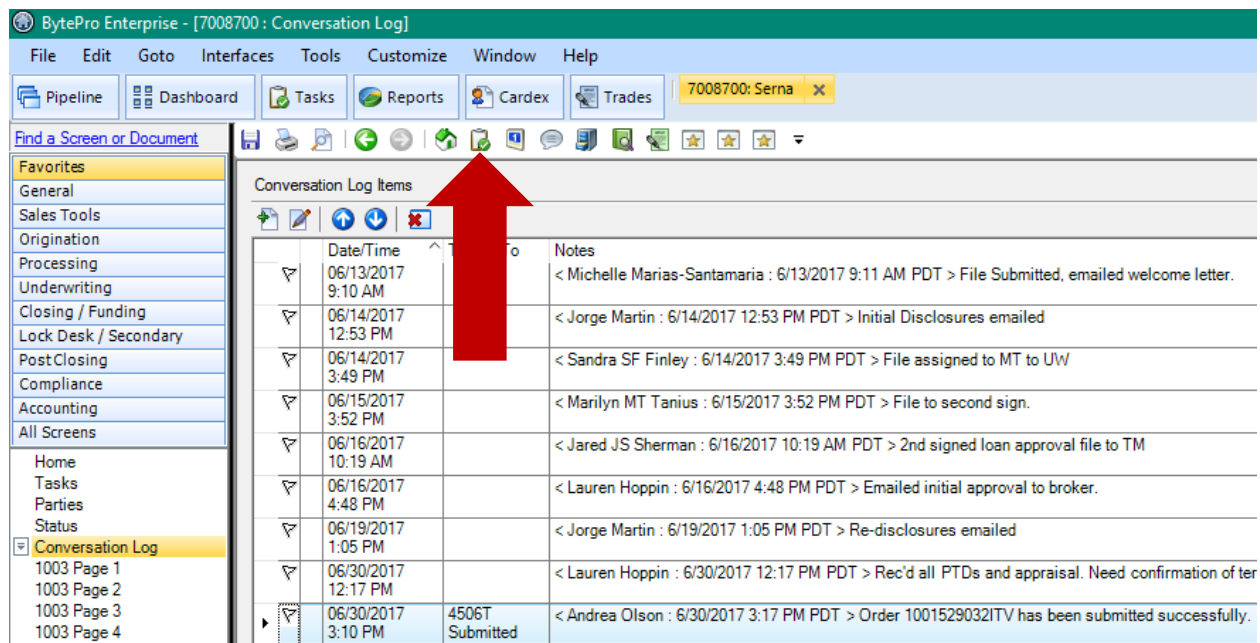Click on the "Green + and Paper" sub-icon to leave a comment.

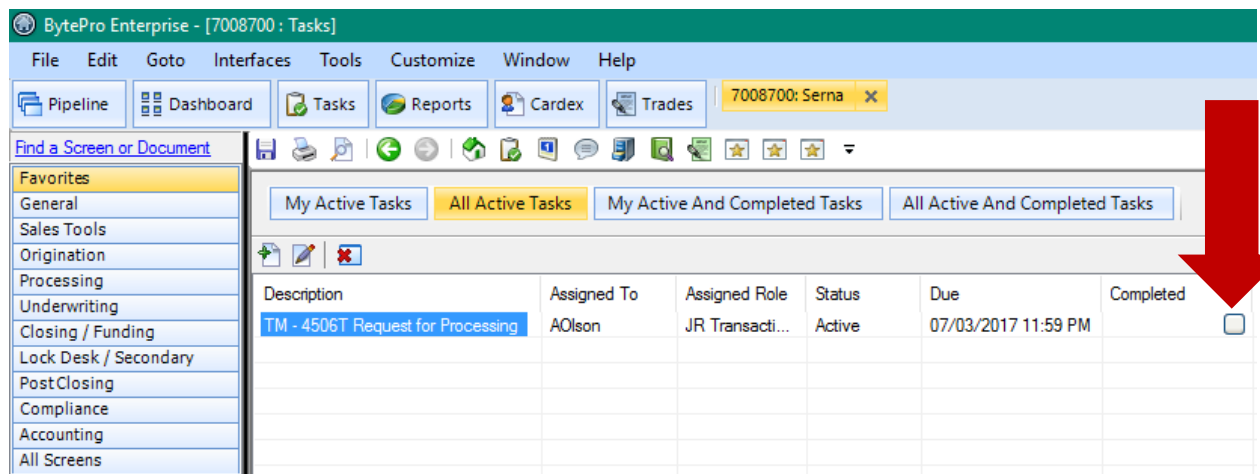**TALKED TO (aka Header):** 4506T Submitted

APPEND NOTES: (PASTE order confirmation message from Informative Research)

"Order 1001529032ITV has been submitted successfully"
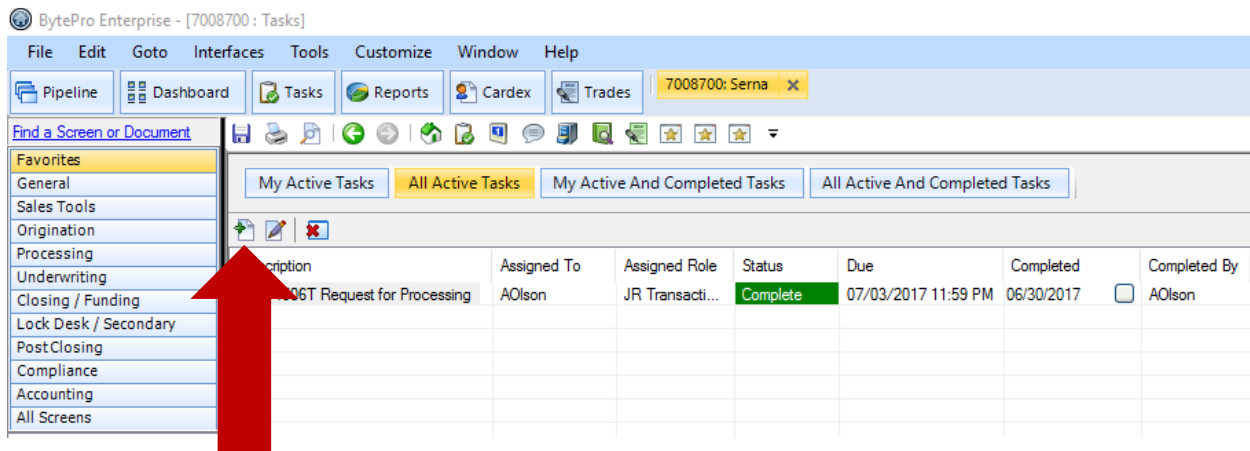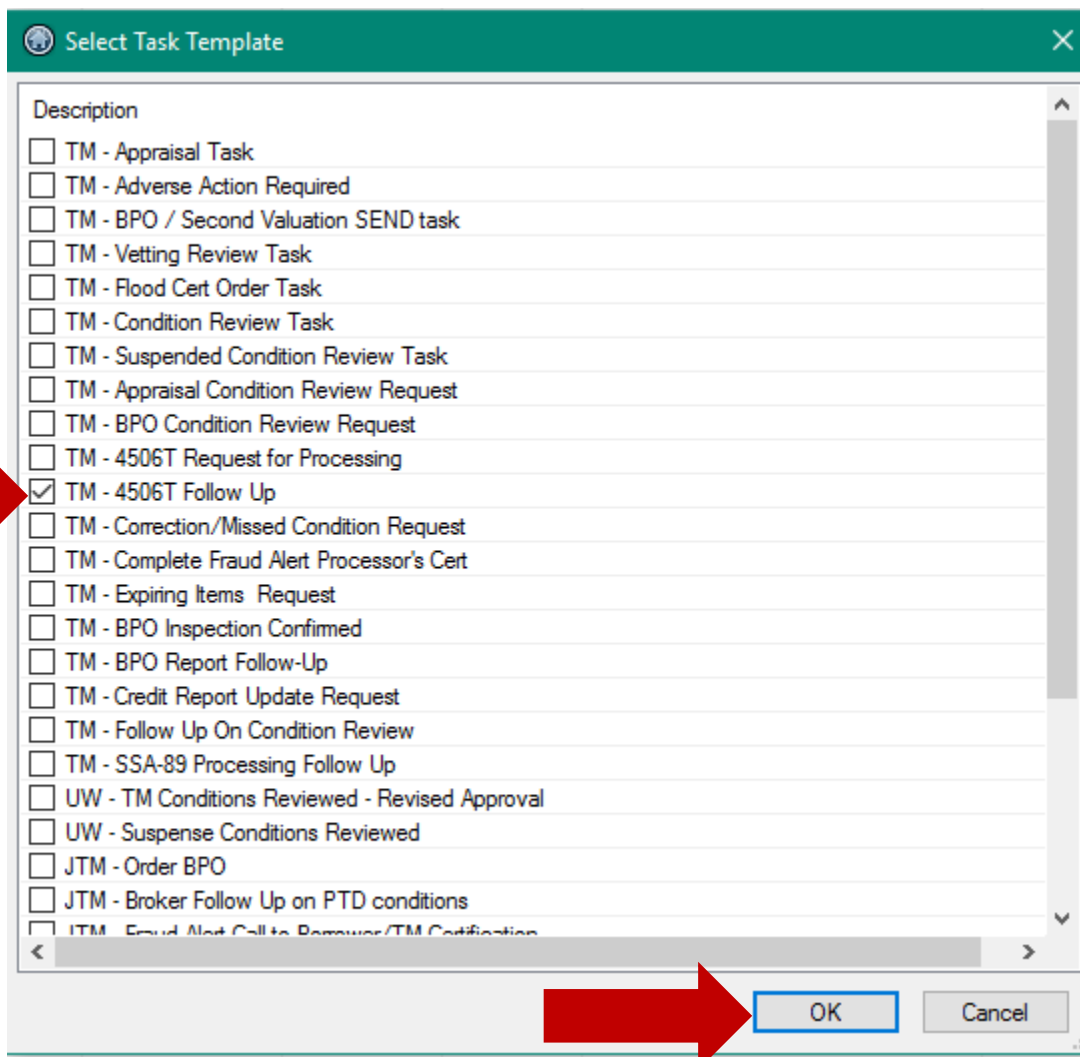
Click "OK"

After you have left your comment in the Conversation Log, click on the "Green Checkmark and Clipboard" sub-icon to clear the task.

Click the box and select MARK AS COMPLETE.

After you have marked the task complete, click on the "Green + and Paper" sub-icon and choose CREATE ONE OR MORE TASKS FROM A TEMPLATE.

Task Template screen will pop up, click to add a check to "TM – 4506T FOLLOW UP" and click "OK".

Reply   Reply All   Forward

Fri 6/30/2017 3:26 PM

no-reply@informativeresearch.com

Order Accepted: Serna, Jesus 1001529032ITV

To   Andrea Olson

Andrea Olson,

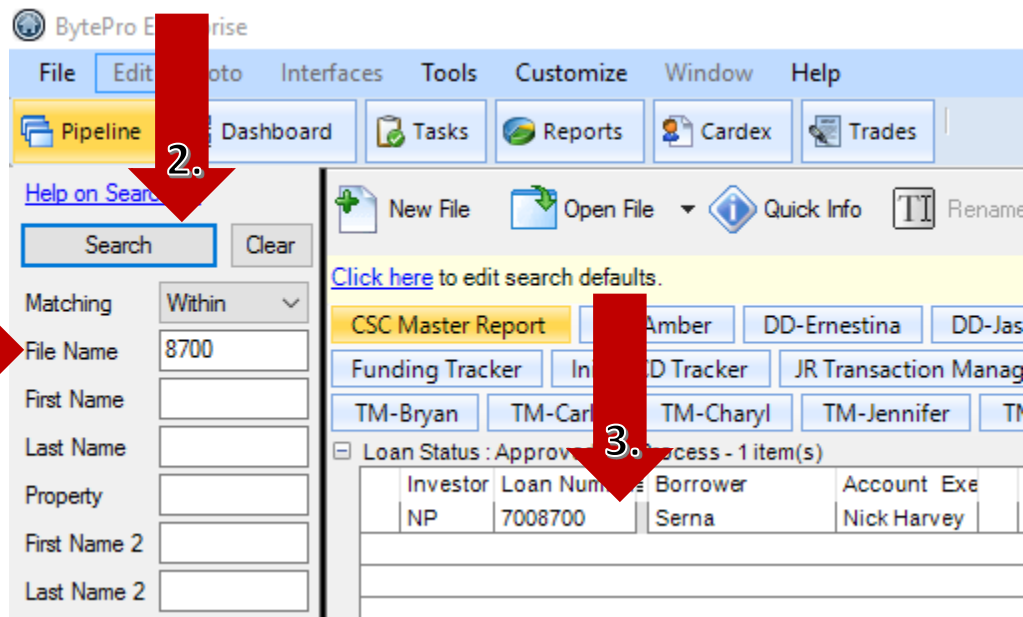ITV Order Number 1001529032ITV has been accepted by the Informative Research ITV system.

Name: Serna, Jesus

Loan Number: 7008700

To view your order click here: https://order.informativeresearch.com/WCS/ITV/ITVOrderList.aspx
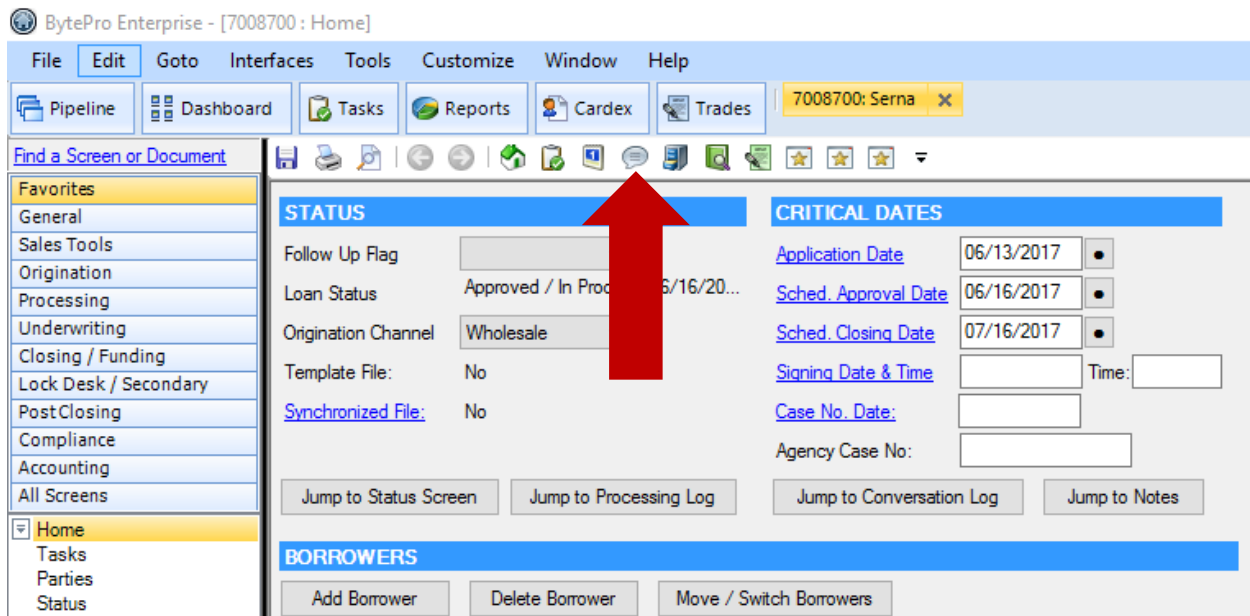
- IR Order Center

You will receive an e-mail from Informative Research letting you know the form you submitted has been accepted and will be sent to the IRS. Forward this e-mail to the TM to notify them.
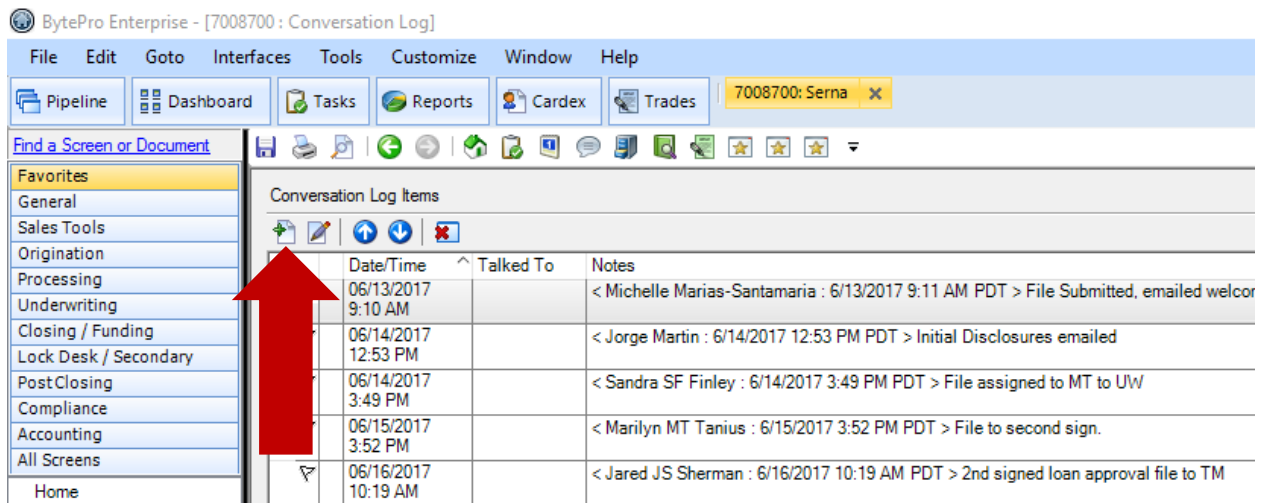

From the home screen of Byte Pro, enter the loan number in FILE NAME and click SEARCH.

Double click on file to open.

Click on the "Thought Cloud" sub-icon to go to the Conversation Log.

Click on the "Green + and Paper" sub-icon to leave a comment.

Edit Conversation

1. Talked To: 4506T Accepted

Date / Time: 06/30/2017 3:48 PM

Follow Up Flag:

Alert:

2. Append Notes — Previously entered notes cannot be edited. Click here for options.

New Notes To Be Appended | Previously Entered Notes

DELETE

Andrea Olson,
ITV Order Number 1001529032ITV has been accepted by the Informative Research ITV
system.
Name: Serna, Jesus
Loan Number: 7008700
To view your order click here:
https://order.informativeresearch.com/WCS/ITV/ITVOrderList.aspx
- IR Order Center

3. OK | Cancel

TALKED TO (aka Header): 4506T Accepted

APPEND NOTES: PASTE message from e-mail **(delete name)**

Click "OK"

WAIT 7-10 DAYS FOR E-MAIL FROM INFORMATIVE RESEARCH

Once you have received the email from Informative Research, take the loan number from the email & enter it into Doc Velocity & Byte Pro.

Once you have entered the loan number click ENTER.

Double click to open the file in each system.

Using Google Chrome (or desired search engine), log into your Informative Research account.

Click on the ITV drop down & choose ITV REPORT LIST.

List of ITV Reports							
Order Number	Name	Type	Year(s)	Loan #	Status	Ordered By	Ordered Date
○ 1001563904ITV	Cruz, Maday	1040	2016,2015	7008883	Submitted	AOlson	8/29/2017 8:58 AM
○ 1001562537ITV	Doar, Doron	1040	2016,2015	7009639	Submitted	AOlson	8/25/2017 10:52 ...
1001559482ITV	Dishman, Ben	1040	2016,2015	7109386	Completed	AOlson	8/21/2017 3:39 PM
○ 1001557264ITV	Stogner, James	1040A	2016,2015	7008713	IRS Rejected	AOlson	8/17/2017 8:54 AM

Once the order is complete, the ORDER NUMBER will show blue in color.

Click on the ORDER NUMBER to open the transcripts.

Internal Revenue Service
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Record of Account

Request Date: 08-24-2017
Response Date: 08-24-2017
Tracking Number: 100347359806

FORM NUMBER: 1040
TAX PERIOD: Dec. 31, 2015   ← Year

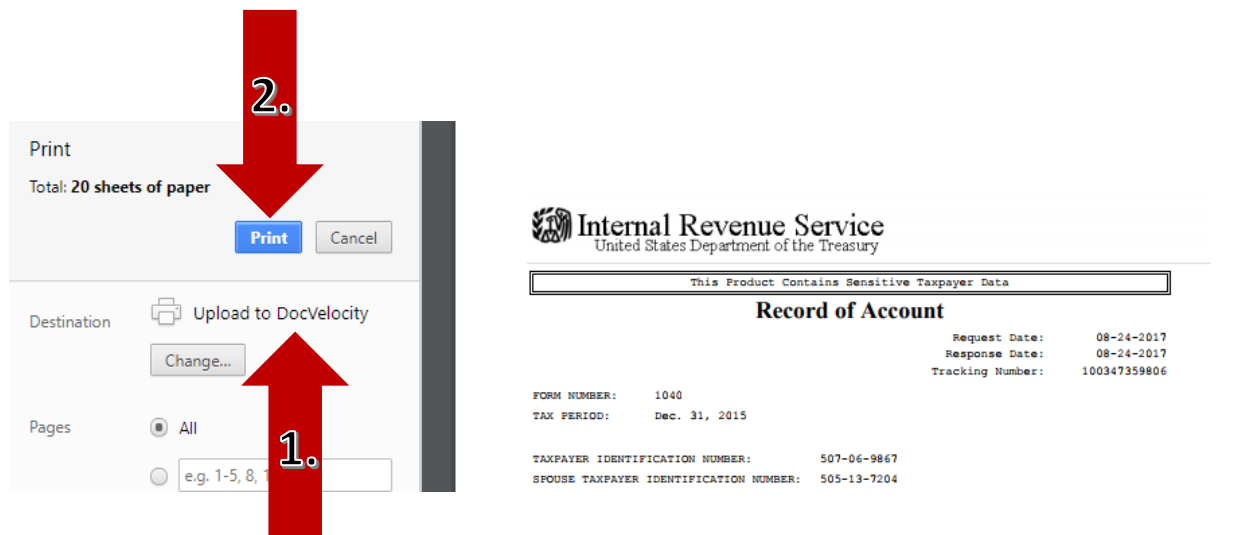TAXPAYER IDENTIFICATION NUMBER: 507-06-9867   ← SS
SPOUSE TAXPAYER IDENTIFICATION NUMBER: 505-13-7204

Name → BEN W & KERRI D DISHMAN
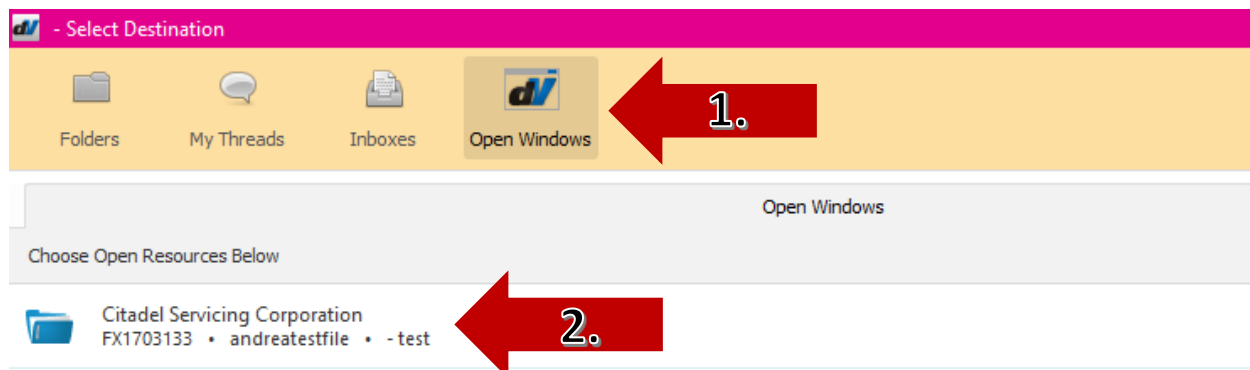1595 BEVERLY BLVD
GERING, NE 69341-1944-955

Compare the transcripts to the 4506T request form in DV.

Verify borrower's name, social security number & **scroll through to make sure you received ALL years requested**.

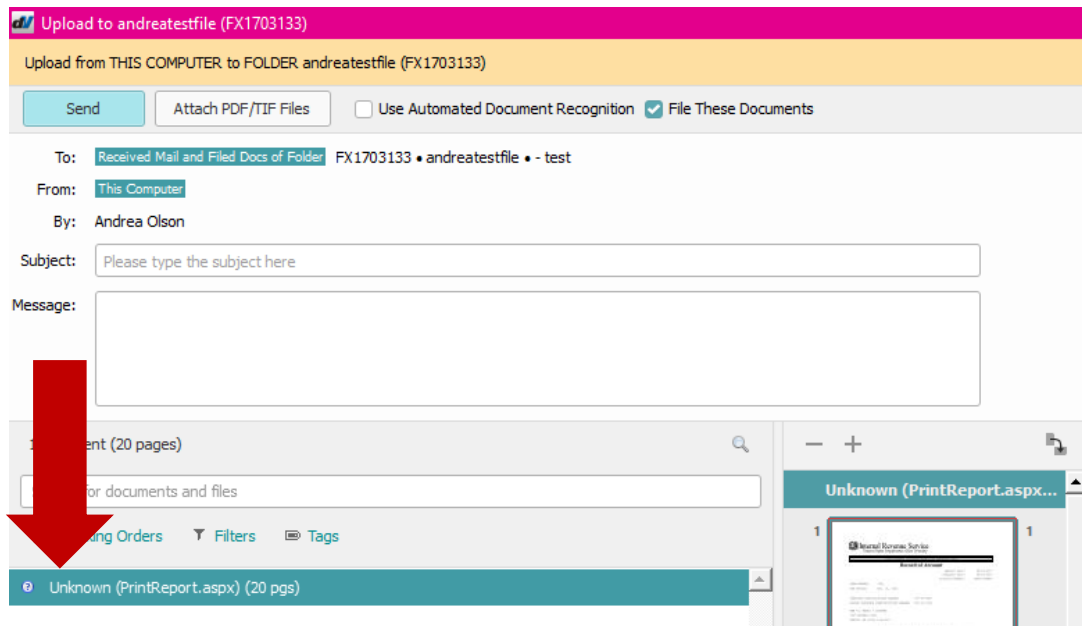Right click on the transcripts and select PRINT.

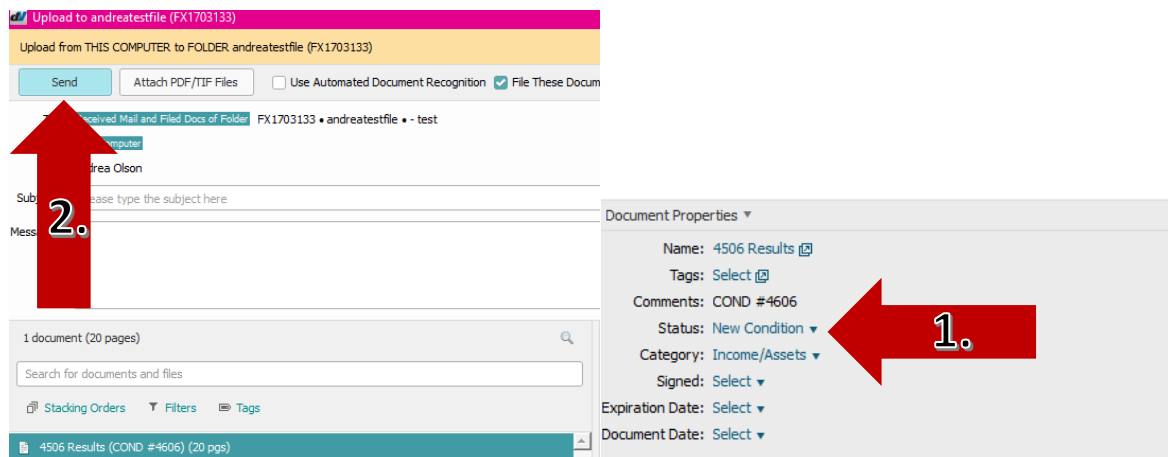Make sure your printer is set to UPLOAD TO DOC VELOCITY and PRINT.

Your "upload" window will pop for DOC VELOCITY.

NOTE: The bright orange color is how you know you are uploading.

Since we opened the file in BOTH DV & BYTE PRO you can select OPEN WINDOWS & double click on the file.

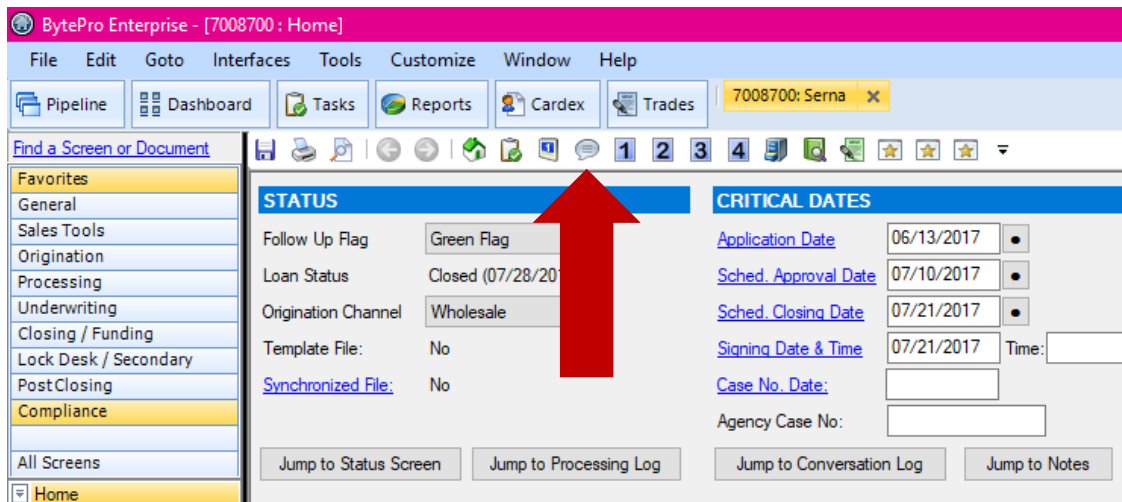Click once on the "UNKOWN PDF" and push the spacebar to rename the PDF.
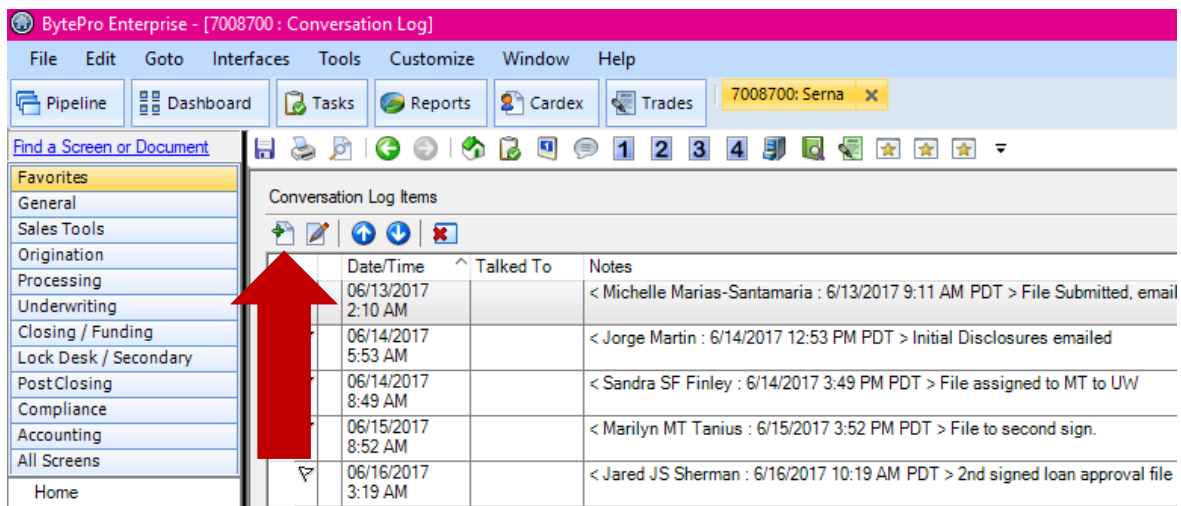

Title: 4506 Results

Comment: COND #4606

Status: NEW CONDITION

SEND.

In Byte Pro, select the "Thought Cloud" sub-icon to leave a comment in the conversation log.

Click on the "Green + and paper" sub-icon to add a note.

Talked To (aka Header): 4506T Results

Append Notes: Uploaded tax transcripts to DV. Notified TM.

Click OK

After leaving your comment, click on the "Green checkmark and Clipoboard" sub-icon to clear the task.
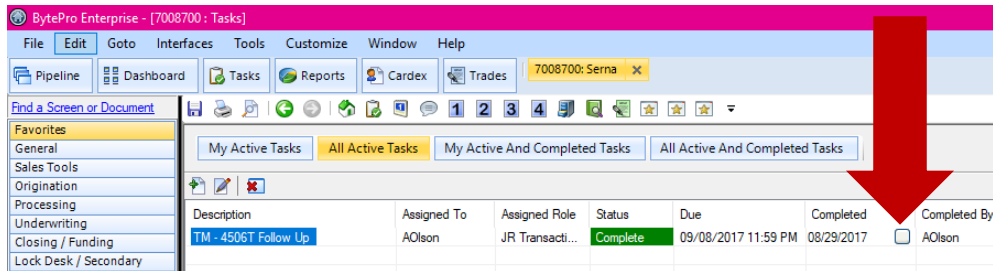
Click on the box under completed and select MARK AS COMPLETE.

Forward the email you received from Informative Research.

TO: TM

CC: TRUDY

BODY OF EMAIL: Tax transcripts uploaded to DV. Conversation log updated.

SEND