



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.

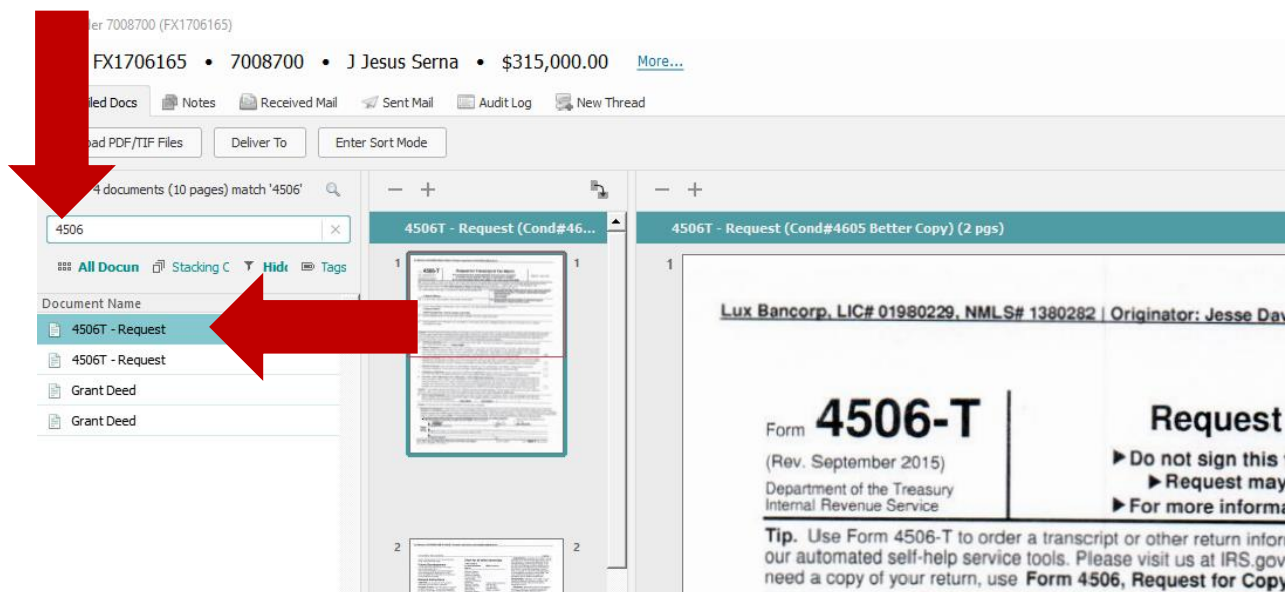
You will receive a task email from the TM requesting to order 4506T.

Site Navigator for Citadel Servicing Corporation (citadelservicing.docvelocity.net)

Folder ID	Loan Number	Borrower First Name	Borrower Last Name	Lien Position
FX1706165	7008700	J Jesus	Serna	First Lien

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.

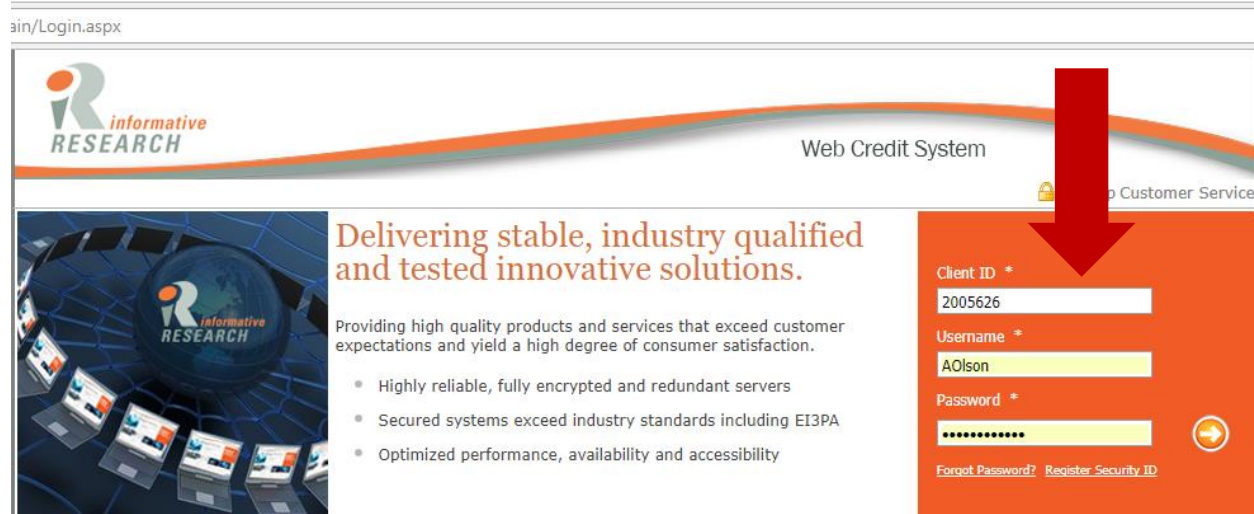


Enter “4506” into SEARCH FOR DOCUMENTS and you will pull up the 4506T – Request.

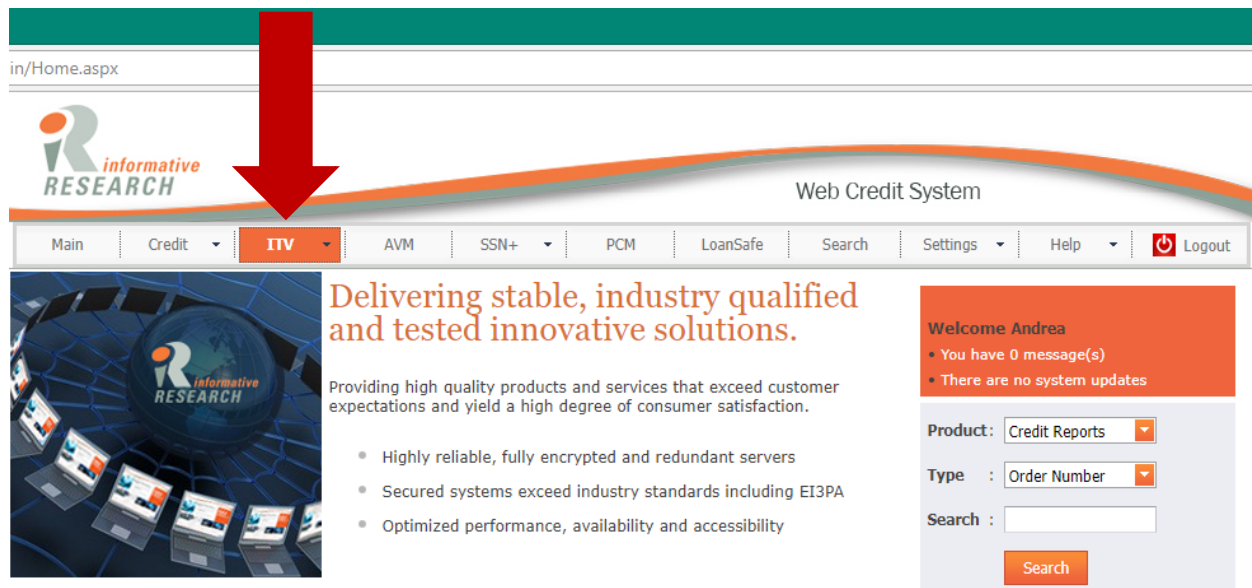
Click on 4506T – Request once to pull up the document. Verify the document is fully completed to refrain from having to repeat the process (**refer to example of fully executed form**).

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

NOTE: MUST UPLOAD PAGE 1 AND PAGE 2 (even though Page 2 is informational only). INFORMATIVE RESEACRH WILL NOT ACCEPT ONLY 1 PAGE.



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.

The screenshot shows the 'order itv report' page in the Web Credit System. A red arrow points to the 'Add to Cart' button. The page shows a search bar, a task list, and an order summary table.

ITV Order Information

Personal Business

Jesus Serna 729-34-5396

1040 7008700 ☒ 2016 ☒ 2015 ☐ 2014 ☐ 2013

7008700 JESU: X Browse... No

Add to Cart

ITV Order Summary

#	Last Name	First Name	SSN	Type	Years	Loan Number	4506-T Form
No data to display							

[Remove from Order](#)

[<<Back to Report List](#)

Order

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

informative RESEARCH Web Credit System

Main | Credit | **ITV** | AVM | SSN+ | PCM | LoanSafe | Search | Settings | Help | Logout

Welcome

Search

Product: Credit Reports

Type: Order Number

Search:

Search

4506-T Task List

ITV Report List

Print 4506-T Form

ITV Instructions

order itv report

ITV Order Information

Personal Business

First Name* Last Name* SSN*

Type* Loan Number 2016 2015 2014 2013

4506-T Form* Browse... Is eSigned?

Add to Cart

ITV Order Summary

#	Last Name	First Name	SSN	Type	Years	Loan Number	4506-T Form
<input checked="" type="checkbox"/>	Serna	Jesus	729345396	1040	2016,2015	7008700	7008700 JESU S SERNA 4506 T - Request.pdf

Remove from Order

<<Back to Report List

Order

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

informative RESEARCH Web Credit System

Main | Credit | **ITV** | AVM | SSN+ | PCM | LoanSafe | Search | Settings | Help | Logout

Welcome

Search

Product: Credit Reports

Type: Order Number

Search:

Search

Report Tasks

Order 1001529032ITV has been submitted successfully.

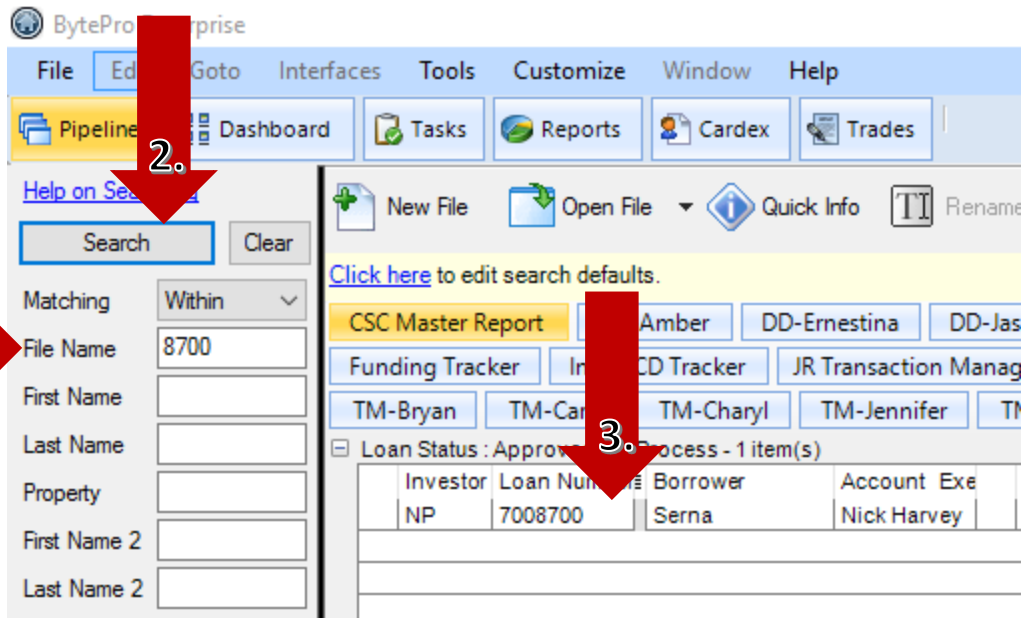
ITV Order Report Details

Borrower: SSN:

List of ITV Reports

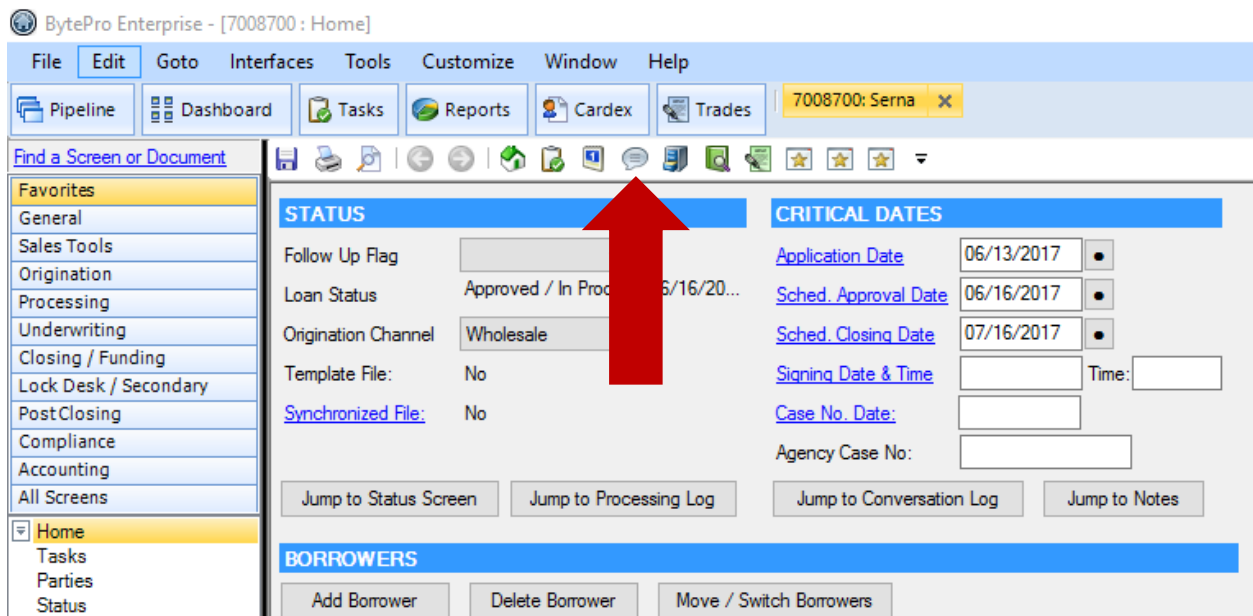
Order Number	Name	Type	Year(s)	Loan #	Status	Ordered By	Ordered Date
1001529032ITV	Serna, Jesus	1040	2016,2015	7008700	Pending	AOlson	6/30/2017 3:01 PM

Highlight and right click on "Order 1001529032ITV has been submitted successfully" to COPY.

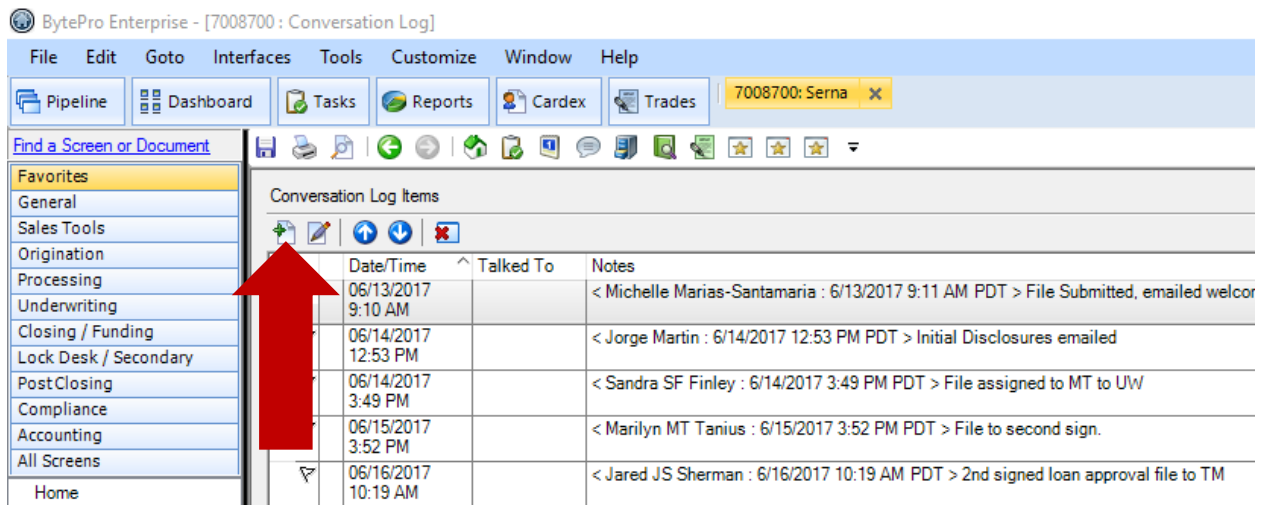


From the home screen of Byte Pro, enter the loan number in FILE NAME and click SEARCH.

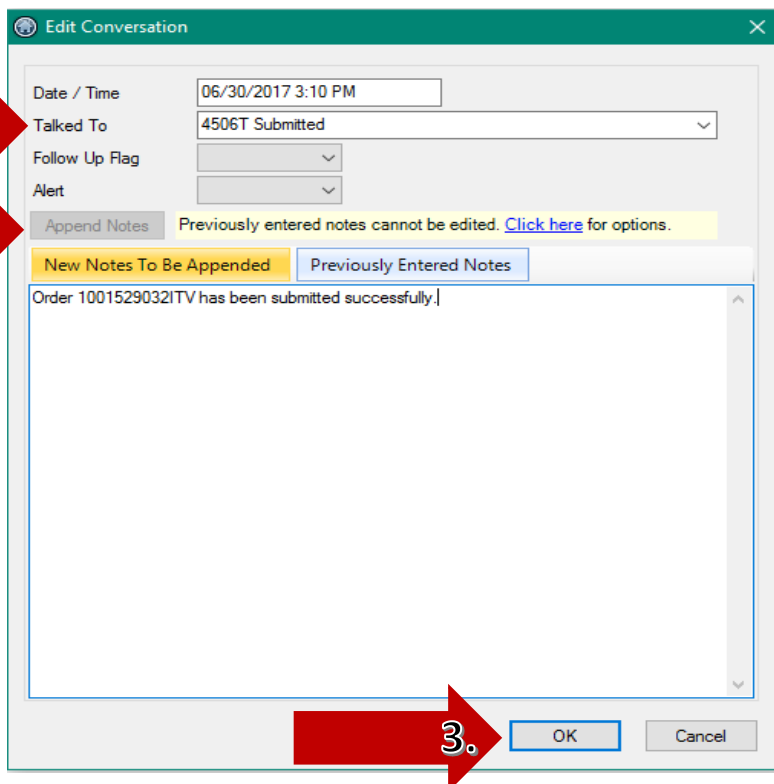
Double click on file to open.



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.

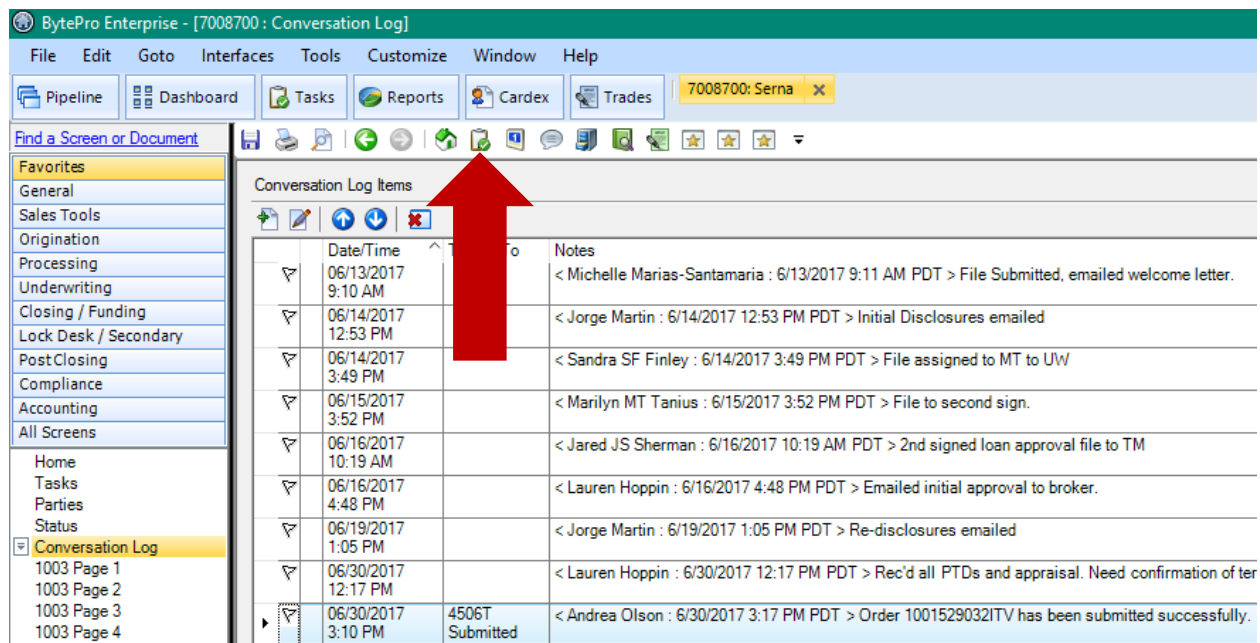


TALKED TO (aka Header): 4506T Submitted

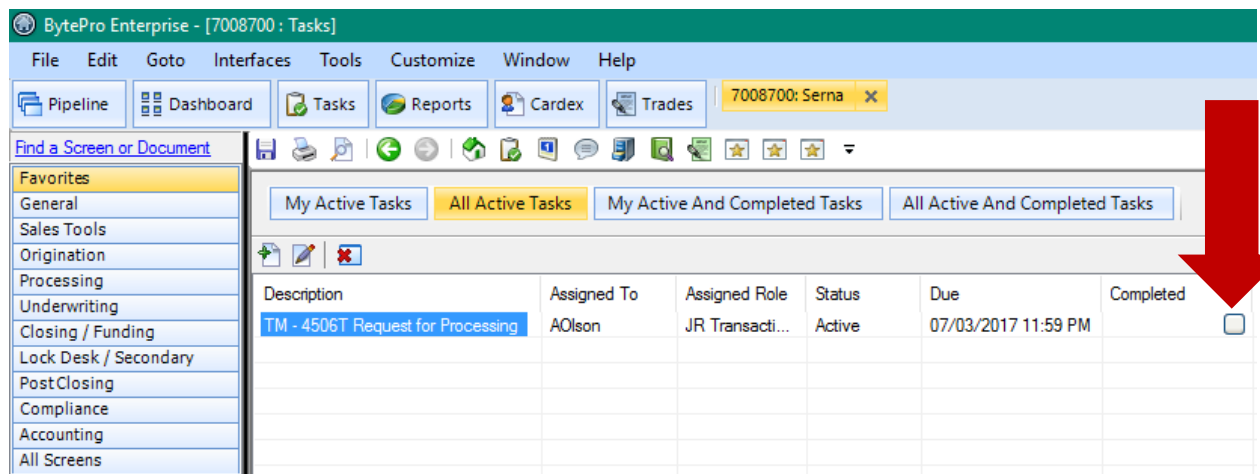
APPEND NOTES: (PASTE order confirmation message from Informative Research)

“Order 1001529032ITV has been submitted successfully”

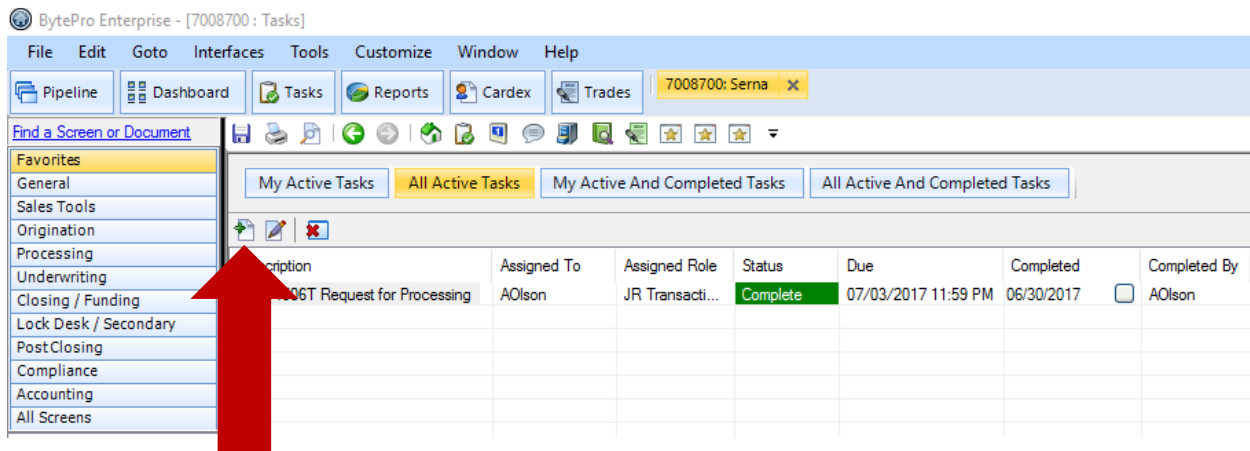
Click “OK”



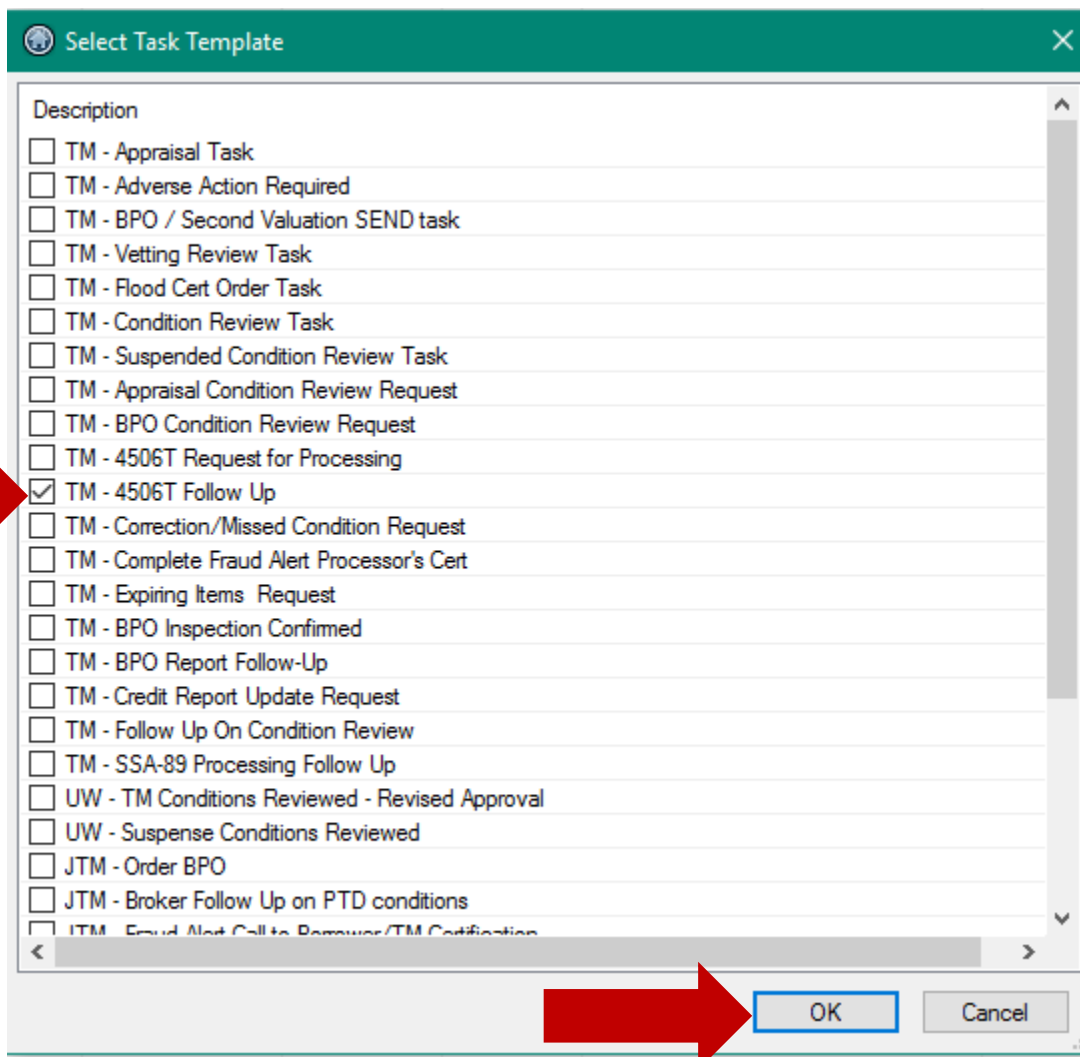
After you have left your comment in the Conversation Log, click on the “Green Checkmark and Clipboard” sub-icon to clear the task.



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.

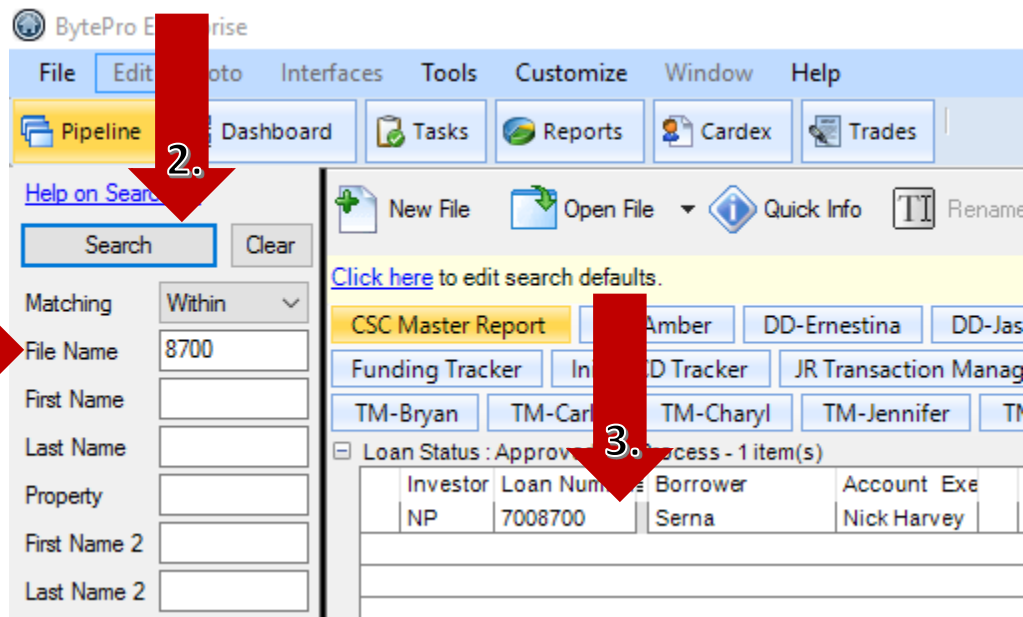
Name: Serna, Jesus

Loan Number: 7008700

To view your order click here: <https://order.informativeresearch.com/WCS/ITV/ITVOrderList.aspx>

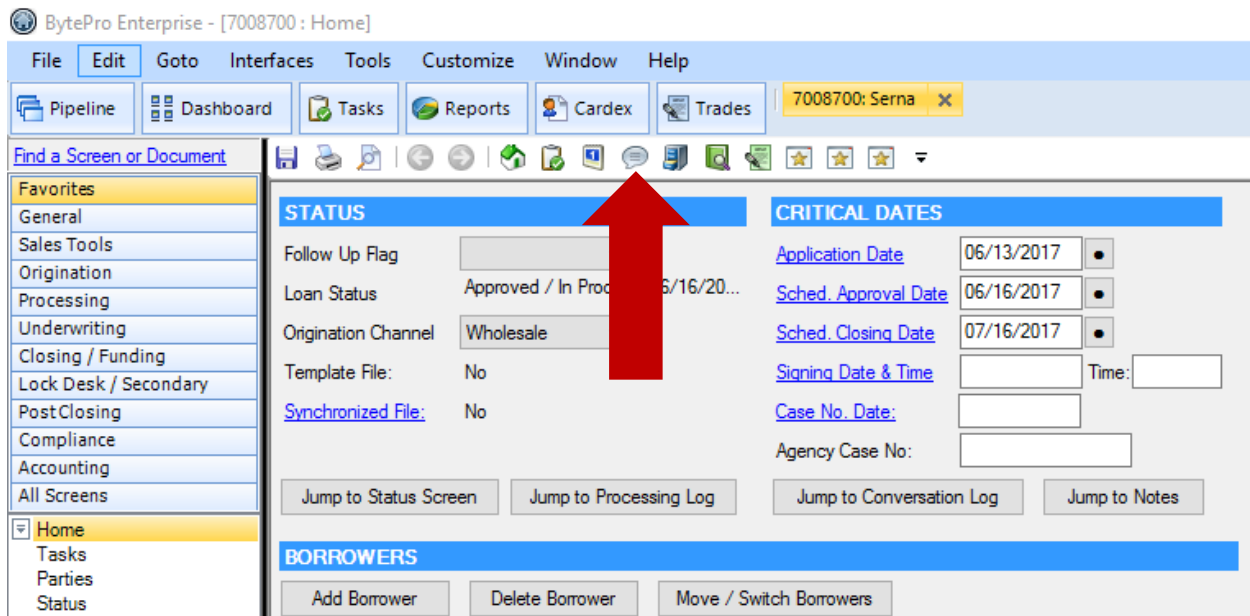
- IR Order Center

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.

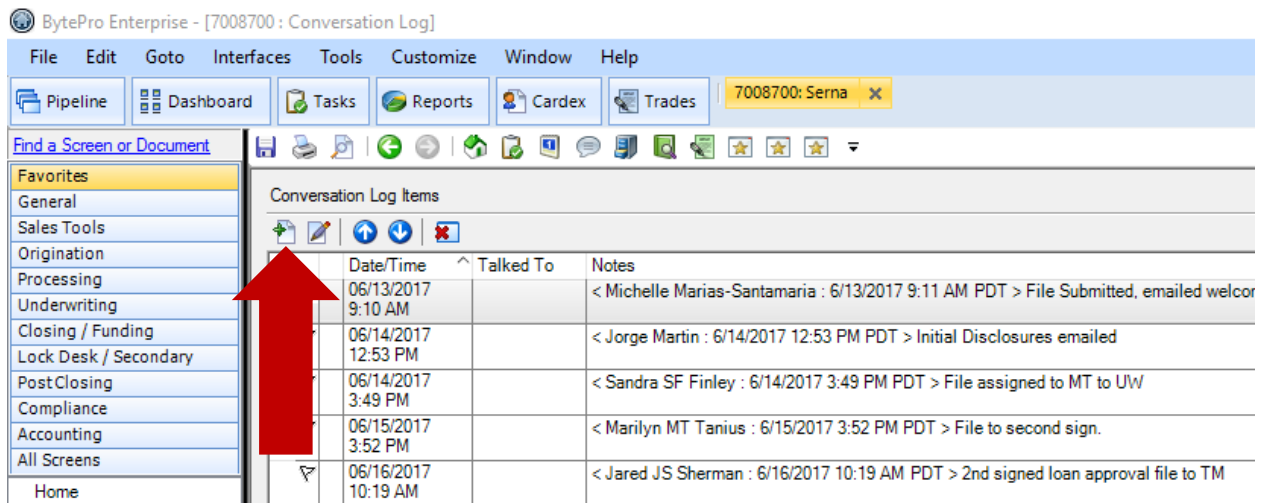


From the home screen of Byte Pro, enter the loan number in FILE NAME and click SEARCH.

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.

The screenshot shows a software window titled "Edit Conversation" with a close button (X) in the top right corner. The window contains several fields and buttons:

- Date / Time:** A text box containing "06/30/2017 3:48 PM".
- Talked To:** A dropdown menu showing "4506T Accepted". A red arrow labeled "1." points to this field.
- Follow Up Flag:** A dropdown menu.
- Alert:** A dropdown menu.
- Append Notes:** A button. A red arrow labeled "2." points to it. To its right is a yellow message box: "Previously entered notes cannot be edited. [Click here](#) for options."
- Notes Section:** Two tabs: "New Notes To Be Appended" (highlighted in yellow) and "Previously Entered Notes" (highlighted in blue). A red arrow labeled "DELETE" points to the "New Notes To Be Appended" tab.
- Notes Text Area:** A large text box containing the following text:
Andrea Olson,
ITV Order Number 1001529032ITV has been accepted by the Informative Research ITV system.
Name: Sema, Jesus
Loan Number: 7008700
To view your order click here:
<https://order.informativeresearch.com/WCS/ITV/ITVOrderList.aspx>
- IR Order Center
- Buttons:** "OK" and "Cancel" buttons at the bottom right. A red arrow labeled "3." points to the "OK" button.

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

Reply Reply All Forward



Thu 7/6/2017 10:07 AM

no-reply@informativeresearch.com

Order Completed : Serna, J Jesus 1001529104ITV


To: Andrea Olson

You forwarded this message on 7/6/2017 10:15 AM.

AOlson,

ITV Order Number 1001529104ITV has been completed by the Informative Research ITV system.

Name: Serna, J Jesus

 Loan Number: 7008700


To view your order click here:

<https://order.informativeresearch.com/WCS/ITV/ITVOrderList.aspx>

- IR Order Center

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

Site Navigator for Citadel Servicing Corporation (citadelservicing.docvelocity.net)



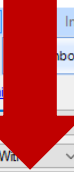
Search All Folders

1 folder matches '7008700'

Search Folders:

Folder ID	Loan Number	Borrower First Name	Borrower Last Name
FX1706165	7008700	J Jesus	Serna

BytePro Ent



File Edit Interfaces Tools Customize Window Help

Pipeline Dashboard Tasks Reports

Help on Search

Search

Matching With

File Name 8700

First Name

Last Name

Property

First Name 2

Last Name 2

Click here to edit search defaults.

CSC Master Report DD-Amber DD-Ernestina DD-Jas

Funding Tracker Initial CD Tracker JR Transaction Manag

TM-Bryan TM-Carla TM-Charyl TM-Jennifer TM

Loan Status: Approved / In Process - 1 item(s)

Investor	Loan Number	Borrower	Account	Exe
NP	7008700	Serna	Nick Harvey	

Once you have entered the loan number click ENTER.

Double click to open the file in each system.



informative RESEARCH

Web Credit System

[Sign Up Customer Service](#)

Delivering stable, industry qualified and tested innovative solutions.

Providing high quality products and services that exceed customer expectations and yield a high degree of consumer satisfaction.

- Highly reliable, fully encrypted and redundant servers
- Secured systems exceed industry standards including EI3PA
- Optimized performance, availability and accessibility

Client ID *
2005626

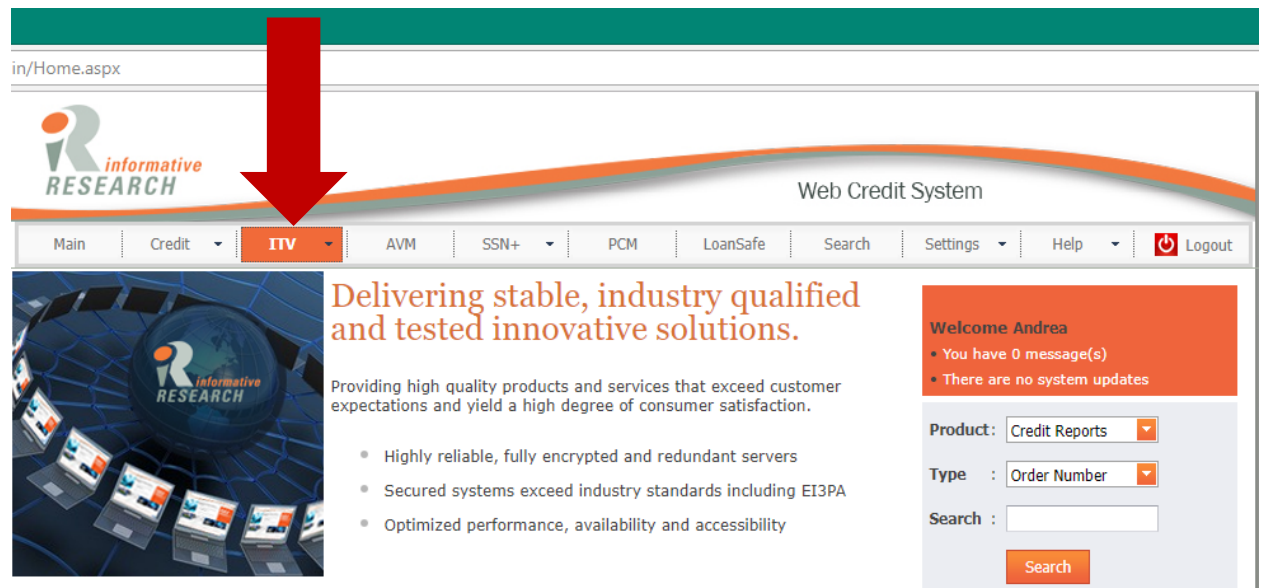
Username *
AOlson

Password *
.....

[Forgot Password?](#) [Register Security ID](#)



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



informative RESEARCH

Web Credit System

Main | Credit | **ITV** | AVM | SSN+ | PCM | LoanSafe | Search | Settings | Help | Logout

Delivering stable, industry qualified and tested innovative solutions.

Providing high quality products and services that exceed customer expectations and yield a high degree of consumer satisfaction.

- Highly reliable, fully encrypted and redundant servers
- Secured systems exceed industry standards including EI3PA
- Optimized performance, availability and accessibility

Welcome Andrea

- You have 0 message(s)
- There are no system updates

Product: Credit Reports

Type : Order Number

Search :

[Search](#)

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
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	1001563904ITV	Cruz, Maday	1040	2016,2015	7008883	Submitted	AOlson	8/29/2017 8:58 AM
<input type="radio"/>	1001562537ITV	Doar, Doron	1040	2016,2015	7009639	Submitted	AOlson	8/25/2017 10:52 ...
<input type="radio"/>	1001559482ITV	Dishman, Ben	1040	2016,2015	7109386	Completed	AOlson	8/21/2017 3:39 PM
<input type="radio"/>	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.



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

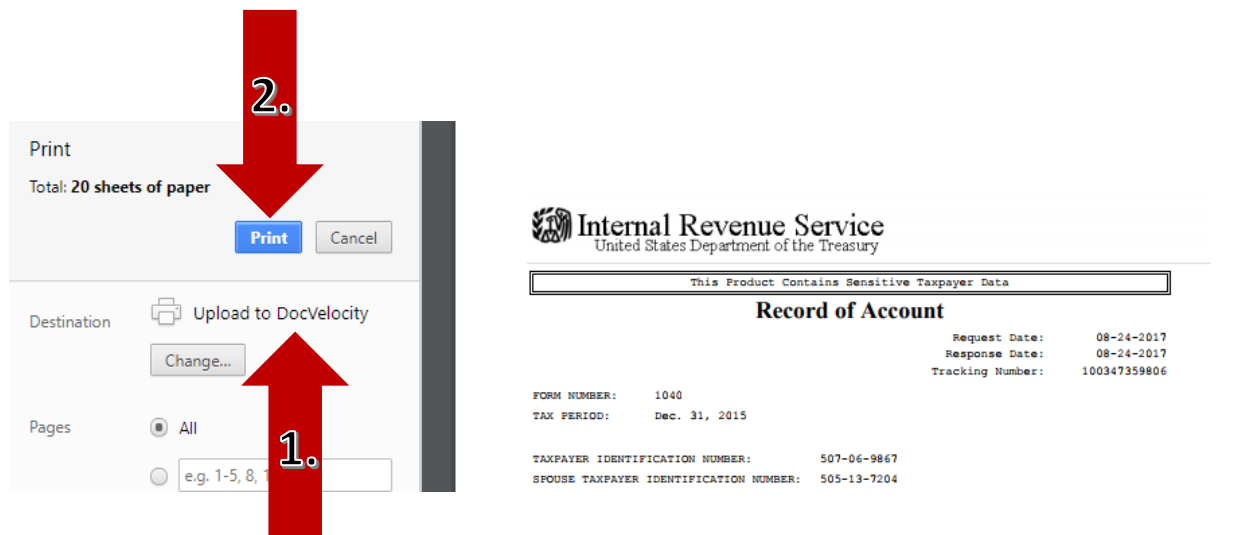
SPOUSE TAXPAYER IDENTIFICATION NUMBER: 505-13-7204

Name

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

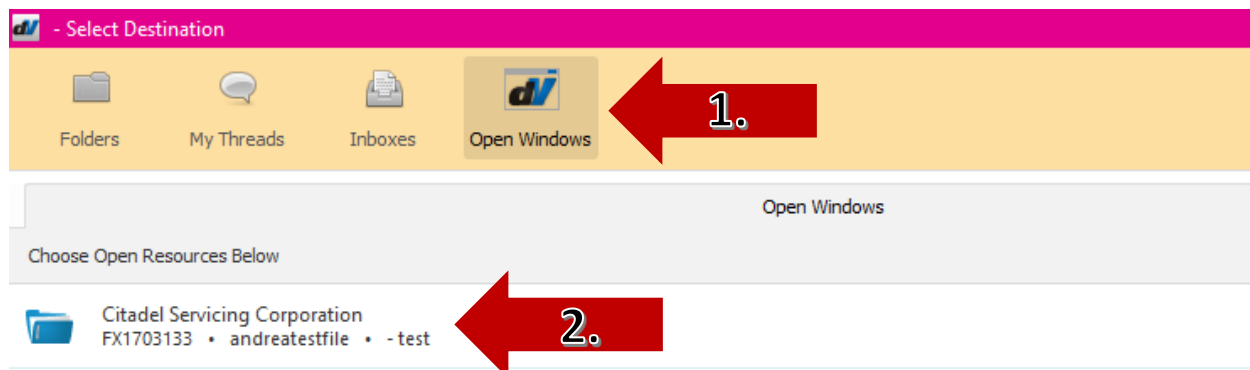
Compare the transcripts to the 4506T request form in DV.

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.

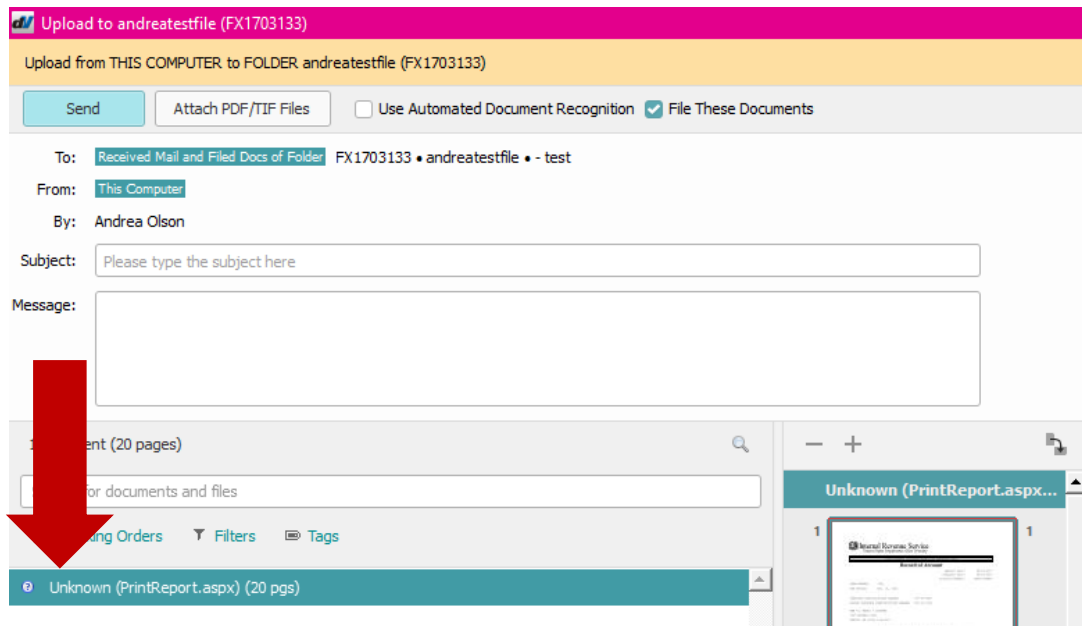
Make sure your printer is set to UPLOAD TO DOC VELOCITY and PRINT.



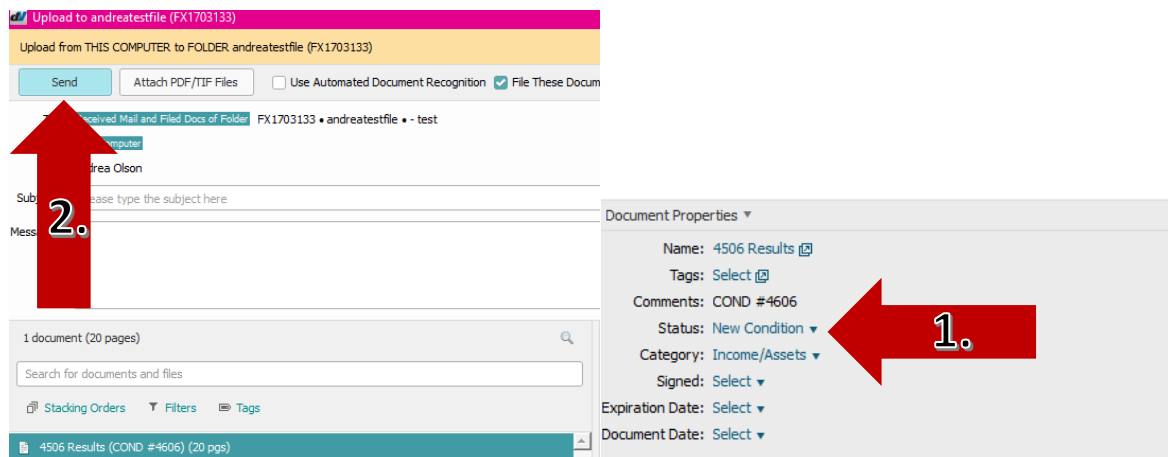
Your "upload" window will pop for DOC VELOCITY.

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.

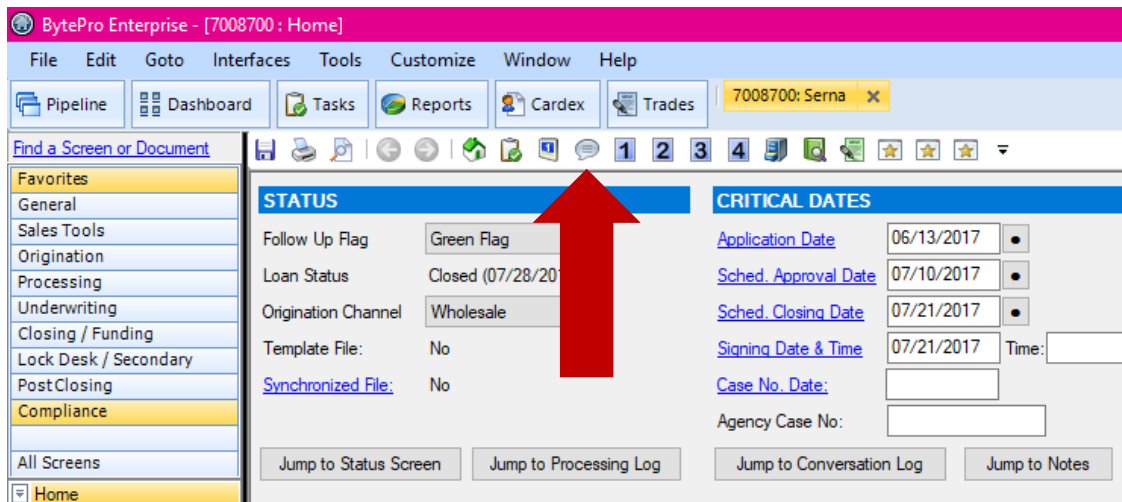


Title: 4506 Results

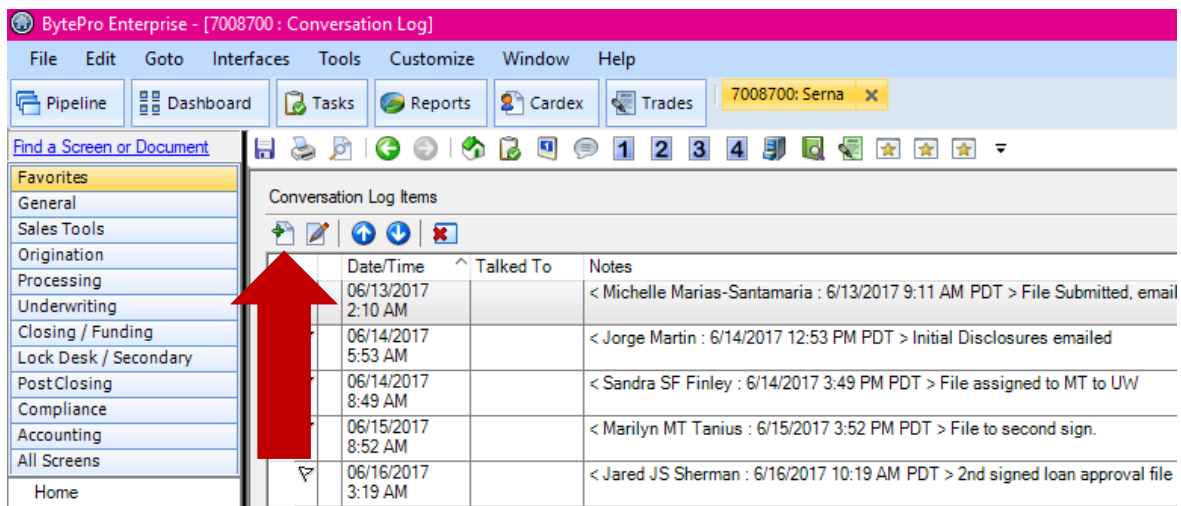
Comment: COND #4606

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.

1. **Talked To**: 4506T Results

2. **New Notes To Be Appended**: Uploaded tax transcripts to DV. Notified TM.

3. **OK**

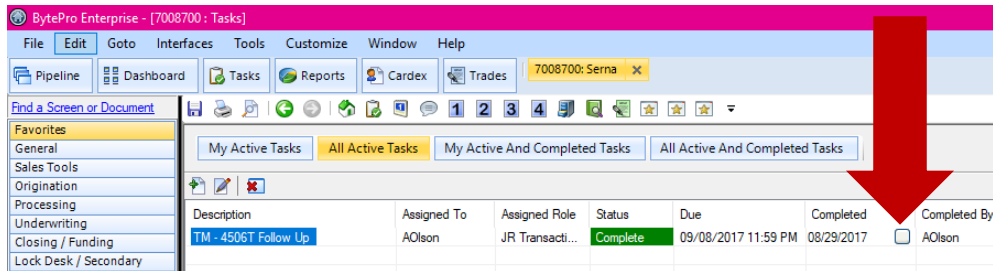
Talked To (aka Header): 4506T Results

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

Click OK

	Date/Time	Notes
	06/13/2017 9:10 AM	< Michelle Marias-Santamaria : 6/13/2017 9:11 AM PDT > File Submitted, emailed welcome letter.
	06/14/2017 12:53 PM	< Jorge Martin : 6/14/2017 12:53 PM PDT > Initial Disclosures emailed
	06/14/2017 3:49 PM	< Sandra SF Finley : 6/14/2017 3:49 PM PDT > File assigned to MT to UW/
	06/15/2017 3:52 PM	< Marilyn MT Tanius : 6/15/2017 3:52 PM PDT > File to second sign.
	06/16/2017 10:19 AM	< Jared JS Sherman : 6/16/2017 10:19 AM PDT > 2nd signed loan approval file to TM
	06/16/2017 4:48 PM	< Lauren Hoppin : 6/16/2017 4:48 PM PDT > Emailed initial approval to broker.
	06/19/2017 1:05 PM	< Jorge Martin : 6/19/2017 1:05 PM PDT > Re-disclosures emailed
	06/30/2017 12:17 PM	< Lauren Hoppin : 6/30/2017 12:17 PM PDT > Rec'd all PTDs and appraisal. Need confirmation of ter
	06/30/2017 3:10 PM	< Andrea Olson : 6/30/2017 3:17 PM PDT > Order 1001529032ITV has been submitted successfully.

After leaving your comment, click on the “Green checkmark and Clipboard” sub-icon to clear the task.



Click on the box under completed and select MARK AS COMPLETE.

i You are not responding to the latest message in this conversation. Click here to open it.

Send

Subject

Tax transcripts uploaded to DV.
Conversation log updated.

Thank you,

Andrea Olson
Assistant Transaction Manager
(949) 900-6630 x457

From: no-reply@informativeresearch.com [mailto:no-reply@informativeresearch.com]
Sent: Thursday, July 6, 2017 10:07 AM
To: Andrea Olson <aolson@citadelservicing.com>
Subject: Order Completed : Serna, J Jesus 1001529104ITV

AOlson,

ITV Order Number 1001529104ITV has been completed by the Informative Research ITV system.

Name: **Serna, J Jesus**

Loan Number: **7008700**

Forward the email you received from Informative Research.

TO: TM

CC: TRUDY

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

SEND