
TRV[®] Services

VOE, 4506-C & SSA-89

Services provided by: **SERVICE 1st INFO SYSTEMS** (Service First Information Solutions)

* Note: The IRS will still accept both the 4506-T and 4506-C forms up until 4/30/2021, after which they will only support the 4506-C.

Encompass

LENDING PLATFORM[™]

Encompass Integration User Guide

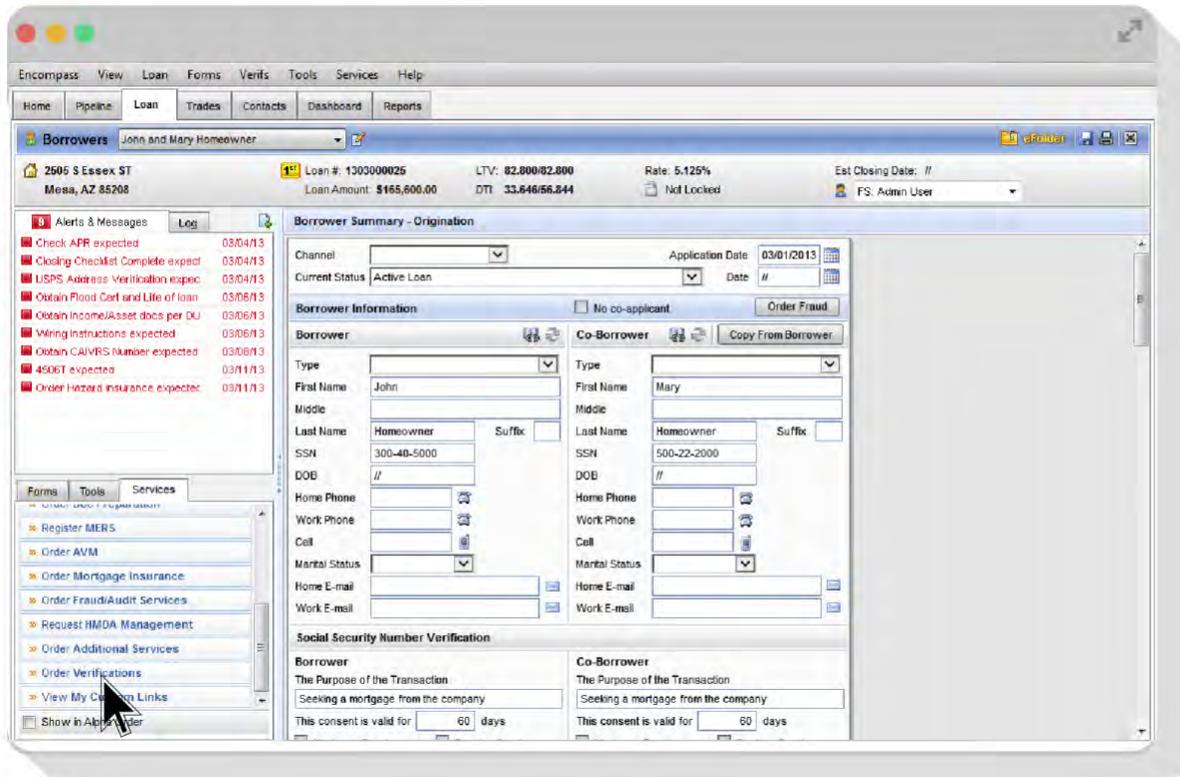
This User Guide will show a Lender how to access Service 1st services from within Encompass.

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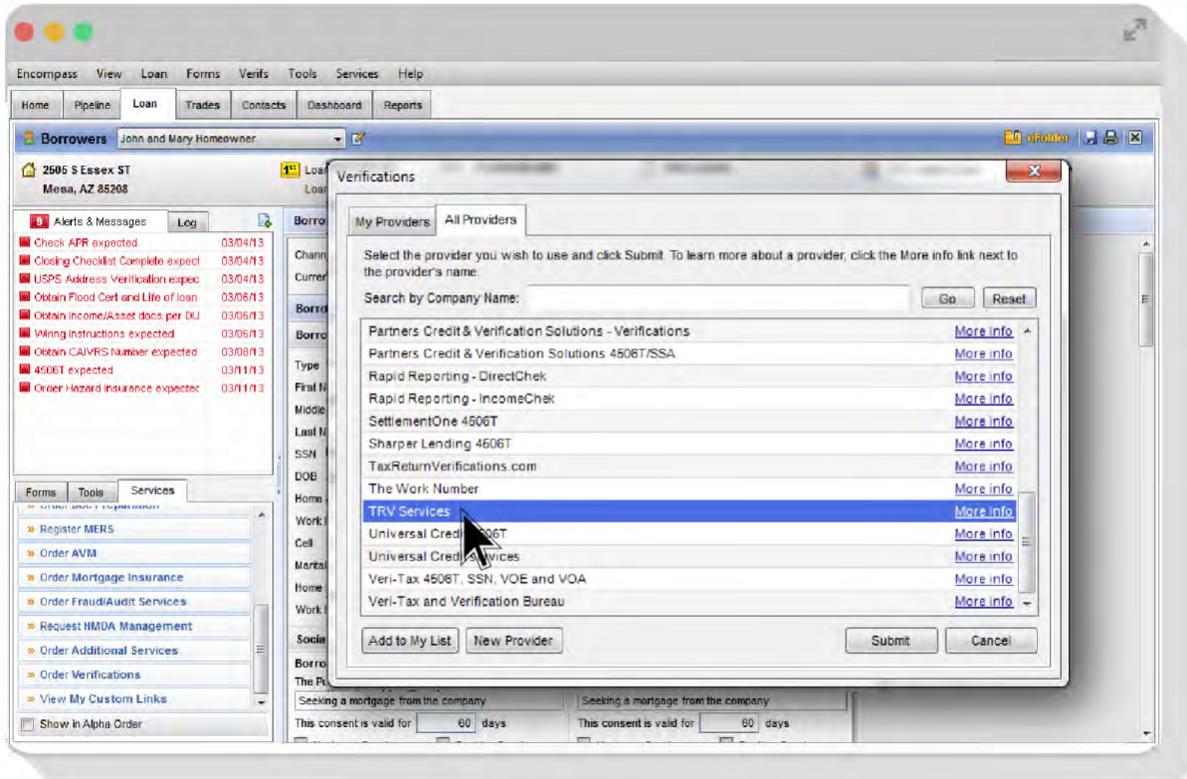
1. Encompass Input Screen

- Click on the service category in the bottom left corner.



2. Select 'TRV Services'

From the All Providers tab click on **TRV Services** and click on the Add to My List button. Click on the Submit button to launch the order form.

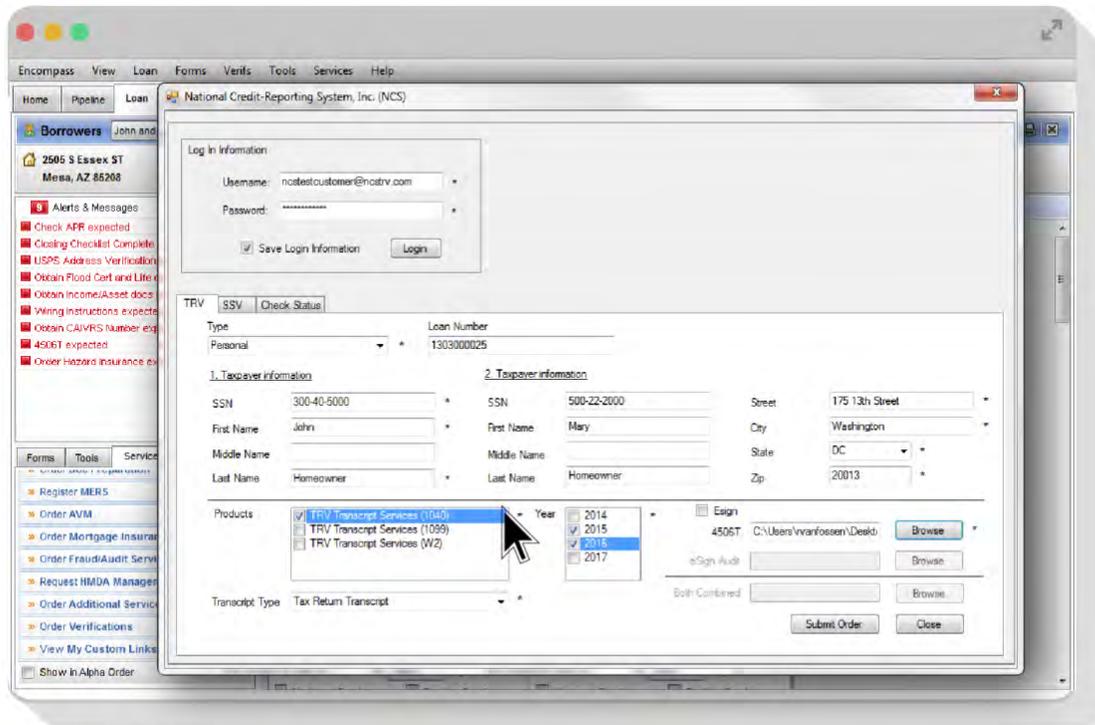


3. Order Form

- Log in by entering the username and password that was assigned by **NCS (National Credit-reporting System, Inc)** onboarding team. Select either product tab (TRV, SSV, or VOE) to order:

TRV | 4506-C PROCESSING

- Enter the taxpayer's information, then select the Product (report) format you desire, along with the IRS transcript type. **Please note, some accounts may have options removed to simplify ordering.*

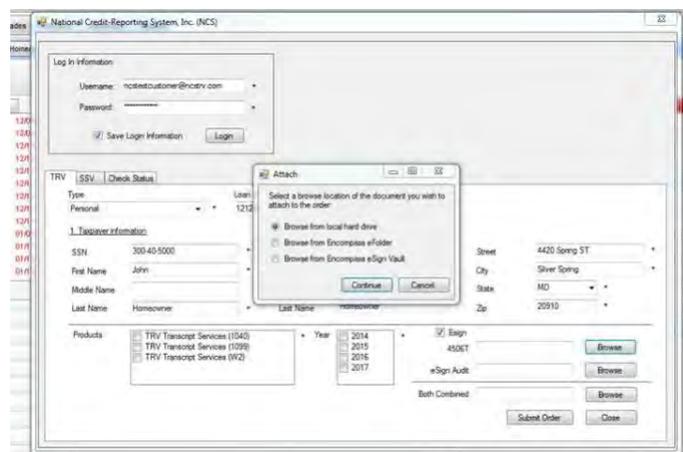


- Next, upload an executed 4506-T. If you have a wet signed, or non-electronically signed 4506-C, simply upload the 4506-C corresponding to the request.

ELECTRONICALLY SIGNED 4506-T

If the 4506-C is electronically signed, you will need to also provide a copy of the COC (Certificate of Completion), or the audit trail that accompanies an electronically signed 4506-C.

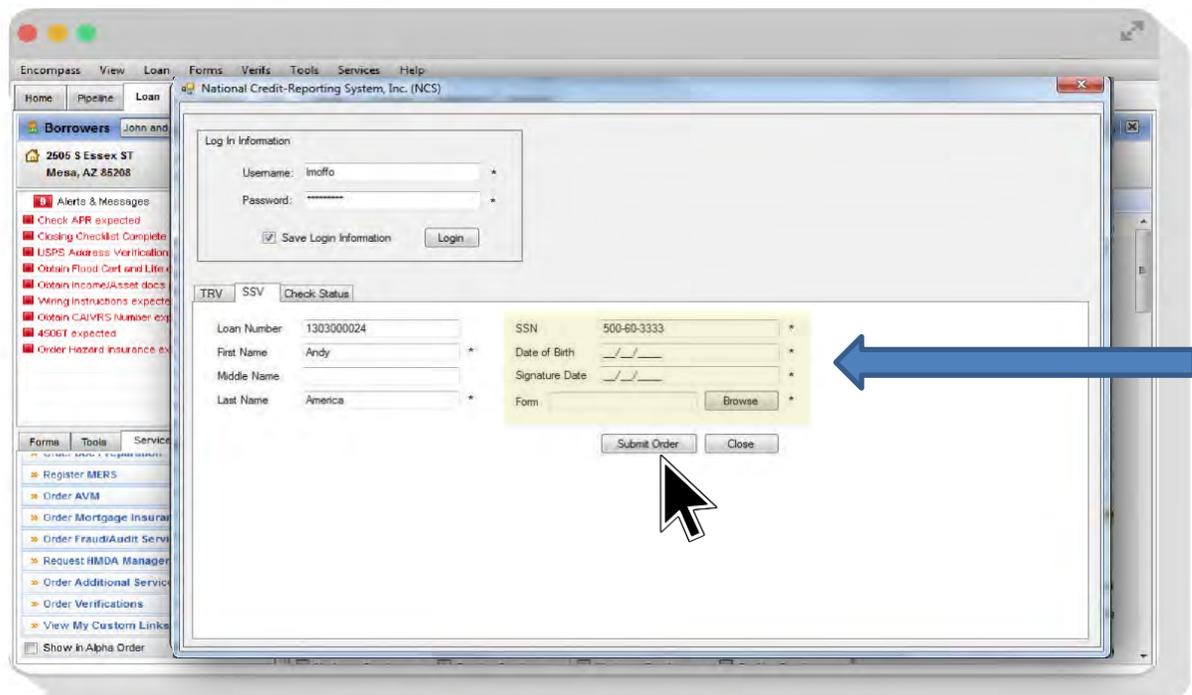
- Within the order screen, users have the option to upload a 4506-C and COC within a single document, or upload them as separate documents. See your EllieMae® administrator or guide regarding eFile or eVault form settings.



- Click Submit Order.

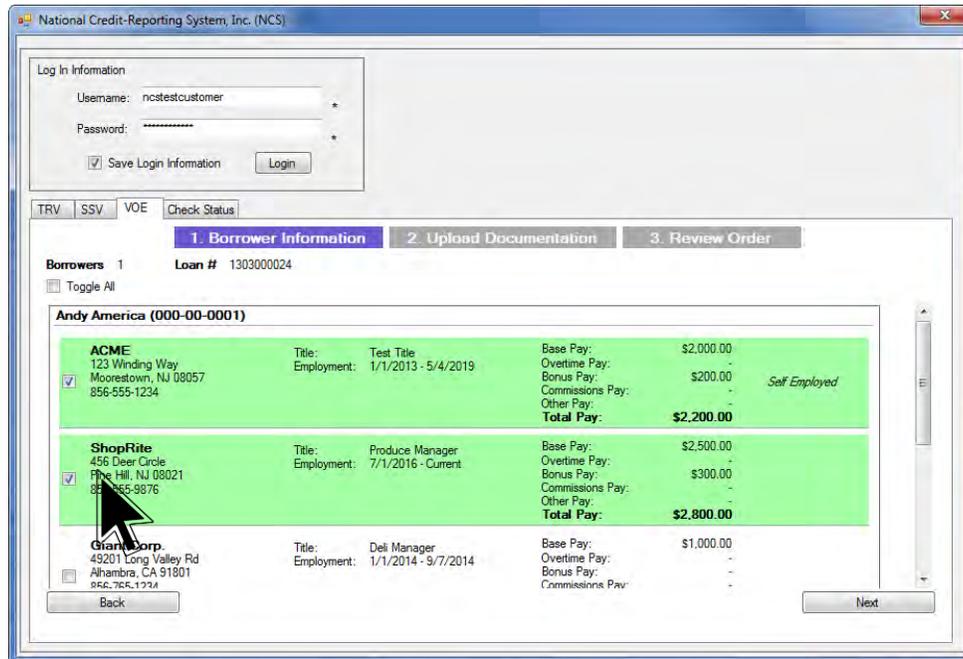
SSV | SSA-89 PROCESSING

- Enter date of birth and signature
- Upload completed SSA-89 form
- Click Submit Order.

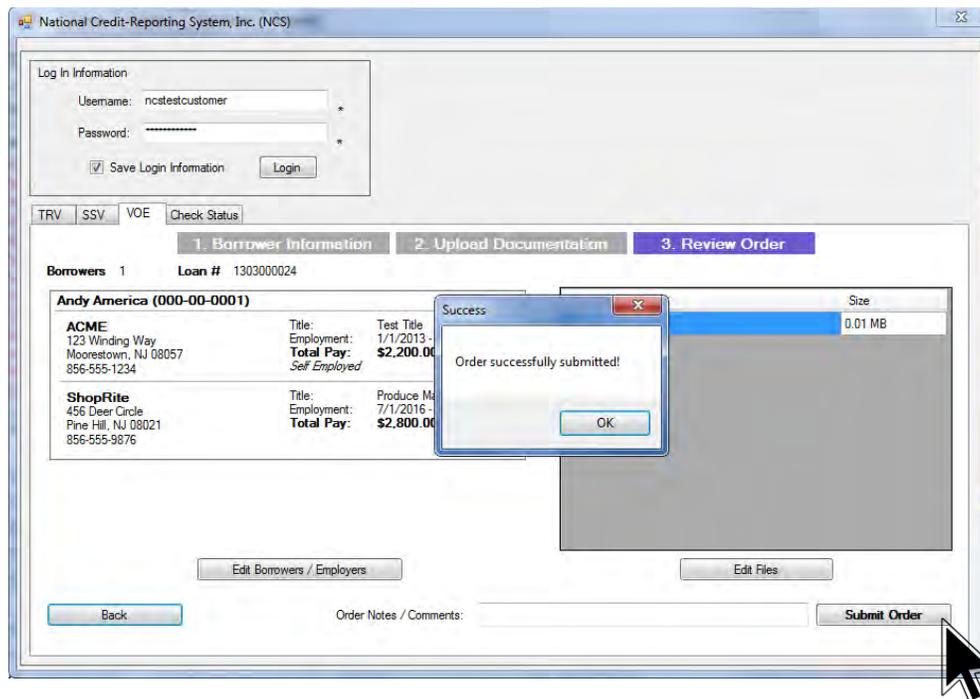


VOE | VERIFICATION OF EMPLOYMENT

- Select the type of verification (VOE, VOI, VVOE).
- Select which borrower employer(s) to verify. Then, upload related documentation.

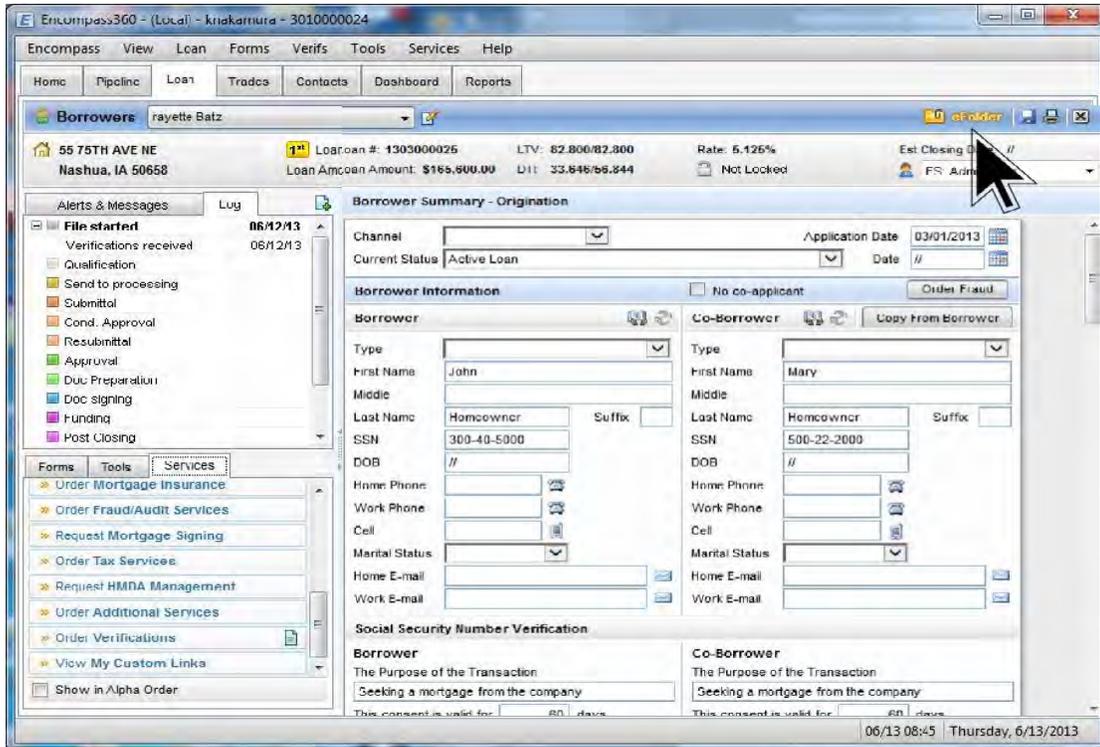


- Submit Order.

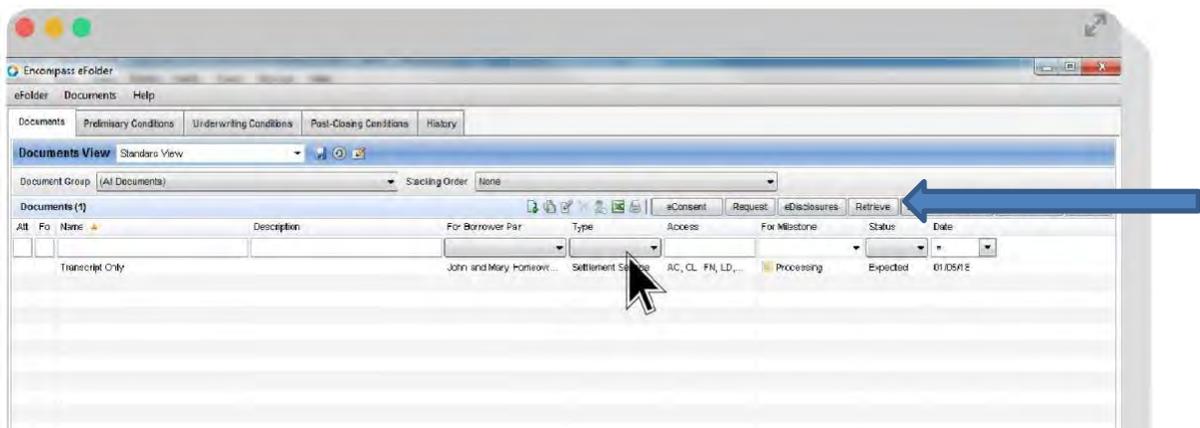


4. Finding documents in the eFolder

- Click on the eFolder link located in the upper right section of the screen.



- The eFolder will list returned documents. Highlight the document associated with the order.
- Once highlighted, click the “Retrieve” button in the top right.
- The document will automatically be uploaded and stored into the e-folder.



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