

## How to Order Tax Transcript Request

To get to the Tax Transcript Request ordering page, click on the *Tax Transcript* link under *Employment/ Income/ Asset Verification* in the *Products & Services* section.

**Products & Services**

- ▶ **Credit Verification**
- ▶ **Property Verification**
- ▼ **Employment/Income/Asset Verification**
  - [Order Verification of Employment](#)
  - [Order Tax Transcript](#)
  - [Order Verification of Deposit/Assets](#)
- ▶ **Fraud Detection**

[Find Ordered Products](#)  
[Settlement Services Worksheet \(SSW\)](#)

### Tax Transcript

[Cancel](#)

**Order for Jane Mortgage of the DC Universe(#5554443333) - JANE DOE**

**Loan Identifier** **Notification Email** ?

**Rush Order** ?

**Taxpayer Information**

**Personal**    **Business**

**First Name** R   **Last Name** R   **SSN** R

    

**Spouse's First Name**   **Spouse's Last Name**   **Spouse's SSN**

    

**Current Address**

**Full Address** R ?   [more detail](#)

**Previous Address (shown on last tax return, if different from above)** ?

**Full Address** ?   [more detail](#)

**4506-C Delivery Method** R ?

I will fax the signed 4506-C form.

I will upload the signed 4506-C form.

**Order Detail**

**Tax Forms** R ?   **Transcript Type** R ?   **Year(s) Requested** R ?

1.        2021    2020    2019    2018

**4506-C (PDF or TIFF file smaller than 2MB)**

  No file chosen

[Add Transcript](#)

### Options

Pay by credit card

1. **Fill out the following consumer information on the order screen.** Fields designated with the green letter R are required fields. The rest of the consumer information is optional, but we recommend to fill out as much information as possible.
  - Loan Identifier
  - Name or business name
  - SSN/EIN
  - Full Address under Current Address
2. **Select at least one tax form using the dropdowns and years requested.** The available Tax Forms that can be ordered are:
  - 1040 - The form that individuals use to disclose their annual income for the year.
  - W2 - The form that an employer must send to the employee and the IRS at the end of the year which discloses the employee's annual wages and the amount of taxes withheld from his or her paycheck.
  - 1099 - The form that businesses provide to the independent contractors and the IRS at the end of the year which discloses the non-employee's annual wages.

- 1120 - The form that corporations use to disclose their annual earnings for the year.
  - 1065 - The form that partnerships use to disclose their annual earnings for the year.
3. **Click the *Add Transcript* link to add additional transcripts to the order.** Each transcript will place a tax transcript request order. You may add up to 4 tax transcript request orders.
    - **Click the red X to remove transcripts from the order.**
  4. **Select one of the two delivery methods.** You can either fax a Tax Transcript Request form or upload a signed tax transcript request form in PDF or TIFF format. Depending on your Tax Transcript Request provider, you may have different options. Please see the Additional Fields section for more information.
  5. **Click on the *Order* button to place the credit report order.** If you get any warnings, please correct them and try to order again. You may get a warning screen indicating that a tax transcript request order already exists for the consumer. Please see the Duplicate Detection section for more details.

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## Additional Fields

### Delivery Methods

If your tax transcript request provider supports it, you may have see additional delivery methods. We currently support the following:

- **Faxing.** The faxing option allows a user to fax in a tax transcript request form instead of uploading it via PDF. Most tax transcript request providers no longer support this option.
- **Uploading a PDF or TIFF.** This option is the most commonly used and allows the user to upload a PDF or TIFF tax transcript request form to the provider.
- **Uploading a PDF or TIFF and marking it as an electronically signed tax transcript request.** Due to IRS auditing requirements, a tax transcript request provider may require that the end user upload an electronically signed certificate along with the tax transcript request form.

For e-signed tax transcript requests, please do the following:

1. **Select whether the *Document was electronically signed* checkbox.** This will notify the tax transcript request provider that the order is e-signed (or not) so they can process it correctly.
2. **If the e-sign certificate and tax transcript request form are combined in one PDF, upload it using the *Tax transcript request* upload field.**
3. **If the e-sign certificate and tax transcript request form are in separate PDF documents, upload the tax transcript request form using the *Tax transcript request* upload field and upload the e-signed certificate using the *E-Sign Audit Log* upload field.** This will help ensure your tax transcript request order does not get rejected by the tax transcript request provider.

For assistance with completing the tax transcript request form, please reach out to your CRA provider.

### Rush Order

If your tax transcript request provider supports it, you will see a *Rush Order* checkbox. Otherwise, the checkbox will not appear. The Rush Order checkbox will expedite the processing time to review the order but will be processed normally at the IRS. An additional fee will apply for rush orders.