

How to order Tax Transcripts (TRV) through Calyx Point

Calyx Point and Advantage Credit Tax Transcripts

From a loan file, Services>Verification>Request Verification

The screenshot displays the Calyx Point software interface. The menu bar includes File, Edit, Marketing, Forms, eLoanFile, Track, Lenders, Services, Interfaces, Prospect/Co-Bor, Utilities, Window, and Help. The Services menu is open, showing options like AVM Reports, Closing Documents, Credit Reports, Flood Certification, Initial Disclosures, Title/Escrow, and Verifications. The Verifications sub-menu is expanded, highlighting 'Request Verifications'. Other options in the sub-menu include 'View Report' and 'Populate Employment (1003)'. The main window shows a loan file for 'shaKE, yahoo'. The 'Borrower Information' section includes fields for Name, SSN, and DOB. The 'Co-Borrower' section has a 'Copy from Borrower' button and fields for Name, SSN, and DOB. Below these are contact information fields (Best Contact, Nickname, H Phone, B Phone, Cell/Alt, Fax, E-Mail) and address fields (Present Address, Own/Rent, No of Yrs, Street, City, State, Zip, Country). The 'Borrower' address is populated with '123 MILK STREET', 'PHOENIX', 'AZ', and '85008'.

Request Verifications

Verification Services Provider
 Advantage Credit, Inc (800) 670-7993 [Getting Started](#)

Generic Verification Request

Order

- Order New Verification
- Upgrade Order
- Check Status

Primary Borrower Order Reference Number

Co-Borrower Order Reference Number

Additional Instructions, Comments

Pay by credit card

Request Type

Select Borrower

- yahoo shaKE
- (No Co-Borrower Name)

SSN: SSN:

DOB: DOB:

Verification Type:

- 6a Return Transcript (1040a)
- 6b Account Transcript (1040b)
- 6c Record of Account (1040c)
- Personal (W-2/1099)
- Business (1065/1120)
-

Authorization Method:

Press F1 for help

- From The Request Verification page:**
1. Select Advantage Credit, Inc. as the **Service Provider**.
 2. Click **Order New Verification**
 3. Select **Verification Type(s)**
 4. **Browse** and upload completed, signed 4506t
 5. Click **Submit**

Select File

- Send from Document Repository
- Select a file on your computer

User ID: (800) 670-7993 [Getting Started](#)

Password:

Save Password

