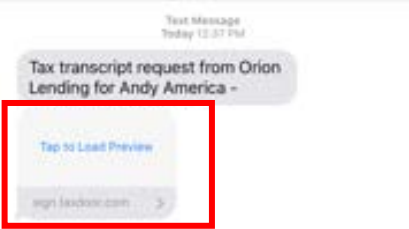
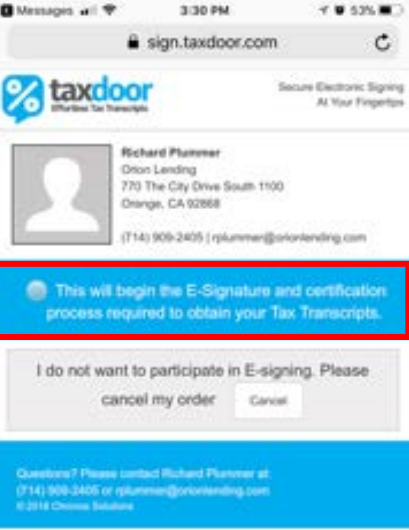


Purpose: This guide will provide step by step instructions to successfully complete the tax transcripts process with Orion Lending.


For desktop instructions, [click here](#)


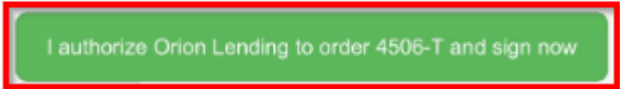
For mobile instructions, [click here](#)

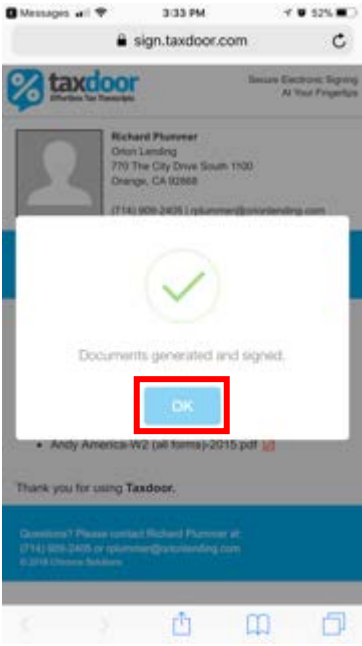
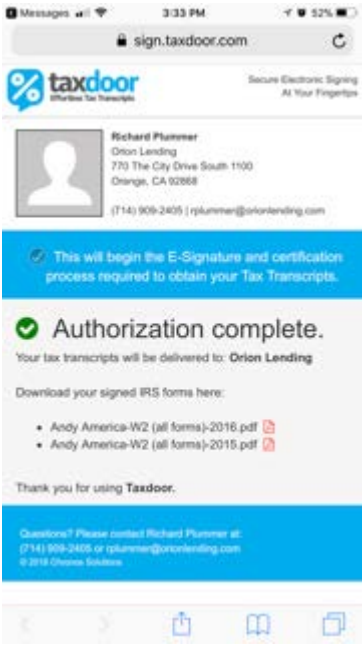
Mobile Instructions

Step	Action
1.	<p>Open the text message. Click the link to launch Taxdoor.</p> 
2.	<p>Select the box that says "this will begin..." to start the process</p> 

Step	Action												
3.	<p>Enter your social security number and select verify</p> <p>*Note: The last 4 digits of your social security number will be present</p> 												
4.	<p>Edit or Verify your current address</p> 												
5.	<p>Review the address associated with each tax year</p>  <p>Verify Tax Return Addresses</p> <table border="1"> <thead> <tr> <th>TAX YEAR</th> <th>ADDRESS USED ON TAX RETURN</th> <th>edit</th> <th>verify</th> </tr> </thead> <tbody> <tr> <td>2016</td> <td>123 Main Street Orange, CA 92868</td> <td></td> <td></td> </tr> <tr> <td>2015</td> <td>123 Main Street Orange, CA 92868</td> <td></td> <td></td> </tr> </tbody> </table> <p>If you see a discrepancy in any of the addresses, select edit and follow steps 6 - 8</p> <p>If addresses are correct, select verify and proceed to step 9</p>	TAX YEAR	ADDRESS USED ON TAX RETURN	edit	verify	2016	123 Main Street Orange, CA 92868			2015	123 Main Street Orange, CA 92868		
TAX YEAR	ADDRESS USED ON TAX RETURN	edit	verify										
2016	123 Main Street Orange, CA 92868												
2015	123 Main Street Orange, CA 92868												



Step	Action
6.	<p>To change any of your addresses, uncheck the "copy address" box and edit the address</p> <p>Enter home address for tax year × 2016</p> <hr/> <p><input checked="" type="checkbox"/> Copy address from current address.</p> <p>123 Main Street Orange, CA 92868</p> <hr/> <p>Note: The accuracy of your address for each filing year is extremely crucial to a successful validation from the IRS. Incorrect addresses result in a rejection and delay in processing your loan application.</p>
7.	<p>When updates are complete, select <i>Save and Verify</i></p> <hr/> <p style="text-align: center;"> <input type="button" value="Close"/> <input checked="" type="button" value="Save & Verify"/> </p> <hr/>
8.	<p>The system will ask you to confirm that the address is correct</p> <div style="border: 1px solid #ccc; padding: 10px; text-align: center; background-color: #f9f9f9;">  <p>Are you sure?</p> <p>Is this the address you filed your taxes with for 2015?</p> <p>1234 Main Street Anyplace, CA 92651</p> <p><input type="button" value="No"/> <input checked="" type="button" value="Yes"/></p> </div>





Step	Action						
9.	<p>Select Verify for each year, confirming they are accurate</p> <p>Verify Tax Return Addresses</p> <table border="0"> <tr> <td>TAX YEAR 2016</td> <td>ADDRESS USED ON TAX RETURN 123 Main Street Orange, CA 92868</td> <td>edit verify</td> </tr> <tr> <td>TAX YEAR 2015</td> <td>ADDRESS USED ON TAX RETURN 123 Main Street Orange, CA 92868</td> <td>edit verify</td> </tr> </table>	TAX YEAR 2016	ADDRESS USED ON TAX RETURN 123 Main Street Orange, CA 92868	edit verify	TAX YEAR 2015	ADDRESS USED ON TAX RETURN 123 Main Street Orange, CA 92868	edit verify
TAX YEAR 2016	ADDRESS USED ON TAX RETURN 123 Main Street Orange, CA 92868	edit verify					
TAX YEAR 2015	ADDRESS USED ON TAX RETURN 123 Main Street Orange, CA 92868	edit verify					
10.	<p>Check "I agree to use Electronic Records & Signatures"</p> 						
11.	<p>Add your e-signature by selecting the button that says, "I authorize Orion Lending to order 4506-T and sign now"</p> <p>Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.</p>  <p>*You must scroll through the <i>entire agreement</i> to authorize your e-signature</p>						

Step	Action
12.	<p>The system will notify you that all documents have been generated and signed</p> 
13.	<p>You will receive confirmation that the tax transcripts will be delivered to Orion and receive a PDF copy for your personal records</p> 

Purpose: This guide will provide step by step instructions to successfully complete the tax transcripts process with Orion Lending via a desktop.

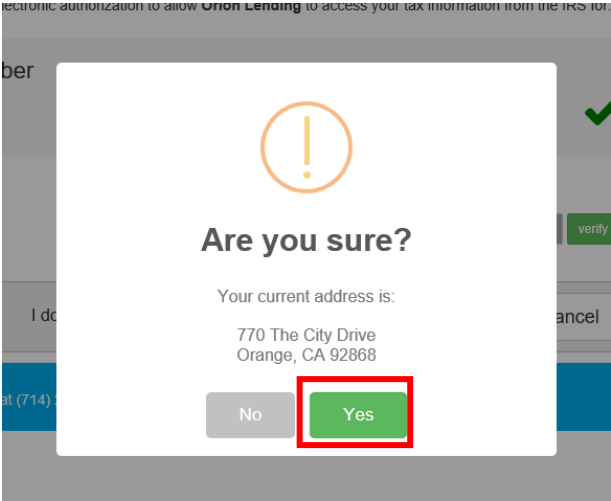
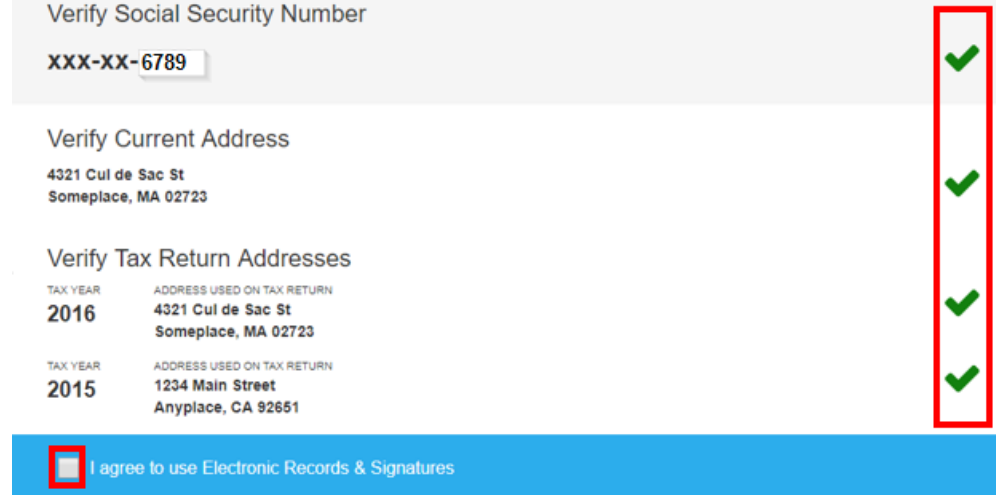
Desktop Version


Step	Action
1.	<p>Open the email E-Signature Request – and select the link provided</p> <p>Subject: [BULK] E-Signature Request - Importance: Low</p> <p>Orion Lending requires a copy of your tax transcripts to complete your mortgage application.</p> <p>Authorization needed for:</p> <p>Please complete your online authorization by clicking here https://sign.taxdoor.com/esign?bb783964</p>
2.	<p>Check the box in the Start Here section</p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div data-bbox="282 1165 568 1266">  <p>Orion Lending 770 The City Drive South 1100 Orange, CA 92868</p> </div> <div data-bbox="1149 1165 1466 1266">  <p>taxdoor Effortless Tax Transcripts</p> </div> </div> <div style="background-color: #00a0e3; color: white; padding: 5px; margin-top: 10px;"> <p>Start here: <input type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> </div> <div style="background-color: #f0f0f0; padding: 5px; margin-top: 5px; text-align: center;"> <p>I do not want to participate in E-signing. Please cancel my order Cancel</p> </div>


Step	Action
3.	<p>Enter your social security number</p> <p>*<u>Note</u>: the last 4 digits of your social security number will be present</p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div data-bbox="282 579 574 684" style="width: 20%;">  <p>Orion Lending 770 The City Drive South 1100 Orange, CA 92868</p> </div> <div data-bbox="1159 579 1484 684" style="width: 20%; text-align: right;">  <p>taxdoor Effortless Tax Transcripts</p> </div> </div> <div style="background-color: #00a0e3; color: white; padding: 5px; margin-top: 10px;"> <p>Start here: <input checked="" type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> </div> <p style="text-align: center; font-size: small;">This is an electronic authorization to allow Orion Lending to access your tax information from the IRS for:</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Verify Social Security Number</p> <p style="font-size: x-small;">ENTER MISSING DIGITS AND CLICK VERIFY</p> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid #ccc; width: 40px; height: 20px; margin-right: 5px;"></div> - <div style="border: 1px solid #ccc; width: 40px; height: 20px; margin-right: 5px;"></div> - 6789 </div> <div style="text-align: right; margin-top: 5px;"> <input type="button" value="verify"/> </div> </div> <div style="text-align: center; margin-top: 10px; font-size: x-small;"> <p>I do not want to participate in E-signing. Please cancel my order <input type="button" value="Cancel"/></p> </div>
4.	<p>Edit or Verify your current address</p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div data-bbox="282 1188 558 1293" style="width: 20%;">  <p>Orion Lending 770 The City Drive South 1100 Orange, CA 92868</p> </div> <div data-bbox="1110 1188 1419 1293" style="width: 20%; text-align: right;">  <p>taxdoor Effortless Tax Transcripts</p> </div> </div> <div style="background-color: #00a0e3; color: white; padding: 5px; margin-top: 10px;"> <p>Start here: <input checked="" type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> </div> <p style="text-align: center; font-size: small;">This is an electronic authorization to allow Orion Lending to access your tax information from the IRS for: Natali</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Verify Social Security Number</p> <p>xxx-xx-6789</p> <div style="text-align: right; margin-top: 5px;"> <input checked="" type="checkbox"/> </div> </div> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Verify Current Address</p> <p>770 The City Drive Orange, CA 92868</p> <div style="text-align: right; margin-top: 5px;"> <input type="button" value="edit"/> <input type="button" value="verify"/> </div> </div>

Step	Action																
5.	<p>Review the address associated with each tax year</p> <p>Verify Tax Return Addresses</p> <table border="0"> <tr> <td>TAX YEAR</td> <td>ADDRESS USED ON TAX RETURN</td> <td><input type="button" value="edit"/></td> <td><input type="button" value="verify"/></td> </tr> <tr> <td>2016</td> <td>123 Main Street Orange, CA 92868</td> <td></td> <td></td> </tr> <tr> <td>TAX YEAR</td> <td>ADDRESS USED ON TAX RETURN</td> <td><input type="button" value="edit"/></td> <td><input type="button" value="verify"/></td> </tr> <tr> <td>2015</td> <td>123 Main Street Orange, CA 92868</td> <td></td> <td></td> </tr> </table> <p>If you see a discrepancy in any of the addresses, select edit and follow steps 6 - 8</p> <p>If addresses are correct, select verify and proceed to step 9</p>	TAX YEAR	ADDRESS USED ON TAX RETURN	<input type="button" value="edit"/>	<input type="button" value="verify"/>	2016	123 Main Street Orange, CA 92868			TAX YEAR	ADDRESS USED ON TAX RETURN	<input type="button" value="edit"/>	<input type="button" value="verify"/>	2015	123 Main Street Orange, CA 92868		
TAX YEAR	ADDRESS USED ON TAX RETURN	<input type="button" value="edit"/>	<input type="button" value="verify"/>														
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TAX YEAR	ADDRESS USED ON TAX RETURN	<input type="button" value="edit"/>	<input type="button" value="verify"/>														
2015	123 Main Street Orange, CA 92868																
6.	<p>Uncheck "Copy address..." and correct address</p> <p>Enter home address for tax year 2016</p> <hr/> <p><input checked="" type="checkbox"/> Copy address from current address.</p> <p>123 Main Street Orange, CA 92868</p>																
7.	<p>When corrections are complete, select <i>Save and Verify</i></p> <p>Enter home address for tax year 2016 ×</p> <hr/> <p><input type="checkbox"/> Copy address from current address.</p> <p><input type="text" value="770 The City Drive"/></p> <p><input type="text" value="92868"/> <input type="text" value="Orange"/> <input style="border: none; border-bottom: 1px solid #ccc;" type="text" value="California"/></p> <hr/> <p style="text-align: right;"><input type="button" value="Close"/> <input type="button" value="Save & Verify"/></p> <p>Repeat for each tax year as necessary</p>																

Note: The accuracy of your address for each filing year is extremely crucial to a successful validation from the IRS. Incorrect addresses result in a rejection and delay in processing your loan application.


Step	Action
8.	<p>The system will ask you to confirm that the address is correct</p> 
9.	<p>Review the entire agreement to confirm the information is accurate and check the "I agree" box to proceed</p> 

Step	Action
10.	<p>Add your e-signature by selecting the button that says, "I authorize Orion Lending to order 4506-T and sign now"</p> <p>*You must scroll through the <i>entire agreement</i> to authorize you e-signature</p> <div data-bbox="272 604 1230 1060" style="border: 1px solid #ccc; padding: 10px;"> <p>IMPORTANT: Please scroll through and read the ENTIRE agreement in order to Authorize your E-Signature.</p> <p>2. An internet web browser which is capable of supporting 128-bit SSL encrypted communications. Your access to this page verifies that your browser and encryption software/device meet these requirements.</p> <p>3. You must have software which permits you to receive and access Portable Document Format or "PDF" files, such as Adobe® Acrobat Reader® version 8.0 and above (available for downloading at https://get.adobe.com/reader/).</p> <p>You may opt out of this consent by clicking the "Cancel" button. Even after your consent, you may still request paper copies of the IRS forms to be delivered to you in paper or non-electronic form by calling the number below, or by writing to us at the address listed below.</p> <p>Contact Information (714) 215-9052 Orion Lending 770 The City Drive South 1100 Orange, CA 92868</p> <p>Provide Authorization</p> <p>I declare that I am either the taxpayer whose name is Natalie J Lopez, or a person authorized to release the tax information requested. If the request applies to a joint return, I attest that I am a spouse. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters planner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506T on behalf of the taxpayer.</p> <p>Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.</p> <p style="text-align: center;"> <input data-bbox="272 1010 678 1045" type="button" value="I authorize Orion Lending to order 4506-T and sign now"/> <input data-bbox="678 1010 748 1045" type="button" value="Cancel"/> </p> </div>
11.	<p>The system will notify you that all documents have been generated and signed</p> <div data-bbox="272 1199 889 1591" style="border: 1px solid #ccc; padding: 20px; text-align: center;">  <p>Documents generated and signed.</p> <input data-bbox="505 1457 646 1535" type="button" value="OK"/> </div>
12.	<p>You will receive confirmation that the tax transcripts will be delivered to Orion and receive a PDF copy for your personal records</p>

 **Authorization complete.**

Your tax transcripts will be delivered to: **Orion Lending**

Download your signed IRS forms here:

- Andy America-W2 (all forms)-2016-2015.pdf 

Thank you for using **Taxdoor.**