



Taxdoor 4506T for Borrowers

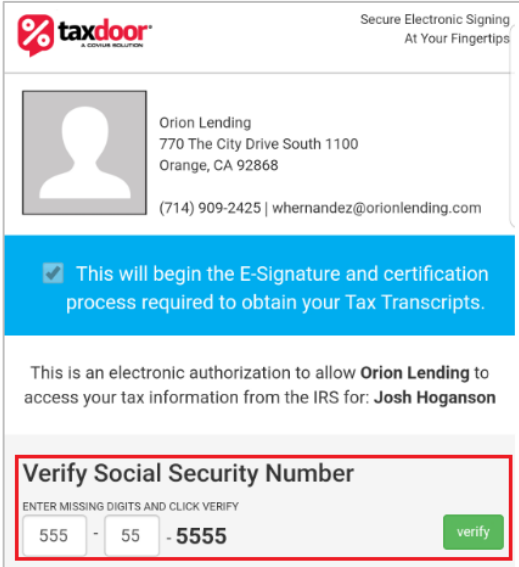
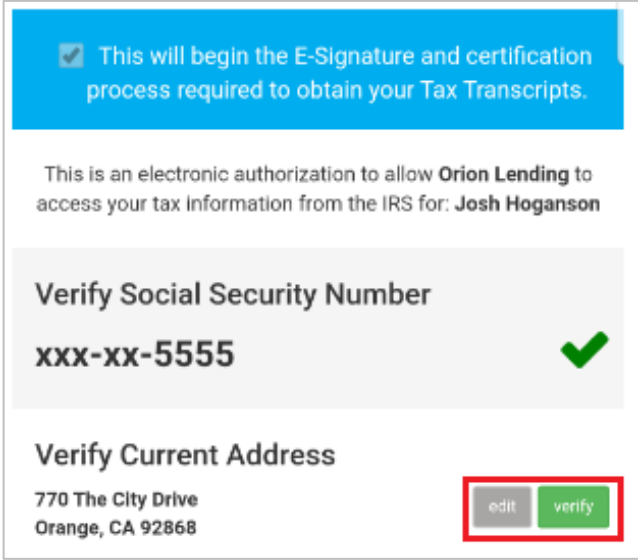
Purpose: Orion Lending requires a copy of customer’s tax transcript to complete a mortgage application. This guide will provide step-by-step instructions to successfully complete the tax transcripts process in Taxdoor.

- For the desktop version, [click here](#).
- For the mobile version, [click here](#)

Mobile Version

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 the E-Signature and certification process required to obtain your Tax Transcripts”.</p>  <p>Note: Selecting Cancel anytime throughout the process will cancel the entire order and you will need to contact your Orion Representative to issue another request.</p>

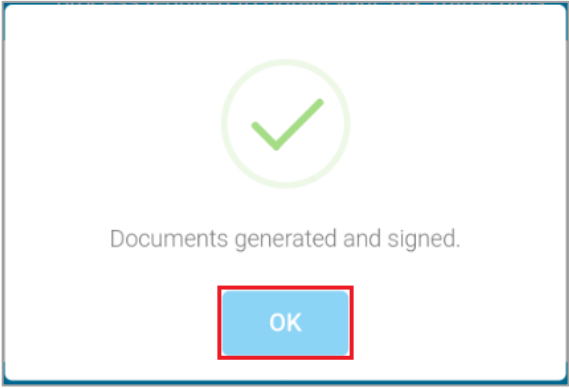

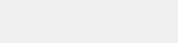

Orion Lending is a registered DBA of American Financial Network Inc. NMLS #237341. This is not an advertisement to extend customer credit as defined by part 1026.2 of Regulation Z. Intended for use by real estate and lending professionals only and not for distribution to consumers. “Equal Opportunity Employer And Corp NMLS#237341”

Step	Action						
3.	<p>Enter your Social Security Number, and click Verify.</p> <div data-bbox="625 331 1141 894" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  </div>						
4.	<p>Confirm your Current Address, and click Verify to confirm the address is accurate or Edit to make changes.</p> <div data-bbox="568 1071 1201 1627" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  </div> <table border="1" data-bbox="305 1675 1466 1858" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; text-align: center;">If</th> <th style="width: 50%; text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>If you identify a discrepancy in the address</td> <td>proceed to steps 5 and 6</td> </tr> <tr> <td>If there are no discrepancies</td> <td>proceed to step 7</td> </tr> </tbody> </table>	If	Then	If you identify a discrepancy in the address	proceed to steps 5 and 6	If there are no discrepancies	proceed to step 7
If	Then						
If you identify a discrepancy in the address	proceed to steps 5 and 6						
If there are no discrepancies	proceed to step 7						



Step	Action
5.	<p>Enter your correct Current Address and click Save and Verify.</p> <div data-bbox="646 338 1127 753" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p>Enter your current address ×</p> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px 0 5px 20px;"> <input type="text" value="770 The City Drive"/> </div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding: 5px 0 5px 20px;"> <div style="border-bottom: 1px solid #ccc; width: 15%; padding: 0 5px;">92868</div> <div style="border-bottom: 1px solid #ccc; width: 40%; padding: 0 5px;">Orange</div> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px 0 5px 20px;"> <input type="text" value="California"/> </div> <div style="display: flex; justify-content: flex-end; padding-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px 10px; margin-right: 10px;">Close</div> <div style="border: 2px solid red; padding: 5px 10px; background-color: #28a745; color: white;">Save & Verify</div> </div> </div>

Step	Action															
7.	<p>Confirm your Tax Return Addresses, and click Verify to confirm the address is accurate, or Edit to make changes.</p> <div data-bbox="604 365 1167 819" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Verify Current Address</p> <p>770 The City Drive Orange, CA 92868 ✓</p> <p>Verify Tax Return Addresses</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 20%;"><small>TAX YEAR</small></td> <td style="width: 60%;"><small>ADDRESS USED ON TAX RETURN</small></td> <td style="width: 20%;"></td> </tr> <tr> <td>2019</td> <td>770 The City Drive Orange, CA 92868</td> <td style="text-align: right; vertical-align: bottom;"><small>edit</small> <small>verify</small></td> </tr> <tr> <td>2018</td> <td>770 The City Drive Orange, CA 92868</td> <td style="text-align: right; vertical-align: bottom;"><small>edit</small> <small>verify</small></td> </tr> </table> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="width: 50%; text-align: center;">If</th> <th style="width: 50%; text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>If you identify a discrepancy in the address</td> <td>Refer back to steps 5 and 6</td> </tr> <tr> <td>If there are no discrepancies</td> <td>Proceed to step 8</td> </tr> </tbody> </table> <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>	<small>TAX YEAR</small>	<small>ADDRESS USED ON TAX RETURN</small>		2019	770 The City Drive Orange, CA 92868	<small>edit</small> <small>verify</small>	2018	770 The City Drive Orange, CA 92868	<small>edit</small> <small>verify</small>	If	Then	If you identify a discrepancy in the address	Refer back to steps 5 and 6	If there are no discrepancies	Proceed to step 8
<small>TAX YEAR</small>	<small>ADDRESS USED ON TAX RETURN</small>															
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8.	<p>Click on the, I agree to use Electronic Records & Signatures box.</p> <div data-bbox="544 1333 1230 1722" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Verify Tax Return Addresses</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 20%;"><small>TAX YEAR</small></td> <td style="width: 60%;"><small>ADDRESS USED ON TAX RETURN</small></td> <td style="width: 20%;"></td> </tr> <tr> <td>2019</td> <td>770 The City Drive Orange, CA 92868</td> <td style="text-align: right; vertical-align: bottom;">✓</td> </tr> <tr> <td>2018</td> <td>770 The City Drive Orange, CA 92868</td> <td style="text-align: right; vertical-align: bottom;">✓</td> </tr> </table> <div style="border: 2px solid red; padding: 5px; margin-top: 10px; background-color: #00aaff; color: white; text-align: center;"> <input checked="" type="checkbox"/> I agree to use Electronic Records & Signatures </div> </div>	<small>TAX YEAR</small>	<small>ADDRESS USED ON TAX RETURN</small>		2019	770 The City Drive Orange, CA 92868	✓	2018	770 The City Drive Orange, CA 92868	✓						
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2018	770 The City Drive Orange, CA 92868	✓														

Step	Action
<p>9.</p>	<p>Scroll through the Entire Agreement and click on I authorize Orion Lending to order 4506-T and sign now box.</p> <div data-bbox="594 365 1182 827" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: 80%;"> <p>Provide Authorization</p> <p>I declare that I am either the taxpayer whose name is Josh Hoganson, 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> <div style="border: 2px solid red; padding: 5px; text-align: center; margin: 10px auto; width: 80%;"> <p>I authorize Orion Lending to order 4506-T and sign now</p> </div> <p style="text-align: center; margin-top: 10px;"> <input type="button" value="Cancel"/> </p> </div> <p>Reminder: Selecting Cancel anytime throughout the process will cancel the entire order and you will need to contact your Orion Representative to issue another request.</p>
<p>10.</p>	<p>The customer will receive confirmation that the tax transcripts will be delivered to Orion and a PDF copy for your personal records.</p> <div data-bbox="683 1146 1091 1873" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: 80%;"> <p>The screenshot shows a mobile browser interface with the URL 'sign.taxdoor.com'. It features the Taxdoor logo and a profile for Richard Plummer. A blue banner states: 'This will begin the E-Signature and certification process required to obtain your Tax Transcripts.' Below this, a green checkmark and the text 'Authorization complete.' are displayed. It lists two PDF files for download: 'Andy America-W2 (all forms)-2016.pdf' and 'Andy America-W2 (all forms)-2015.pdf'. The page concludes with 'Thank you for using Taxdoor.' and contact information for Richard Plummer.</p> </div>

Step	Action
11.	<p>Click OK to confirm the documents have been generated and signed.</p> <div data-bbox="605 331 1170 716" style="border: 1px solid black; padding: 10px; text-align: center;">  <p>Documents generated and signed.</p> <p>OK</p> </div>
12.	<p>Click on the PDF Icon to view a copy of the generated 4506-T.</p> <div data-bbox="493 856 1284 1612" style="border: 1px solid black; padding: 10px;"> <p><input checked="" type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> <p> Authorization complete.</p> <p>Your tax transcripts will be delivered to: Orion Lending</p> <p>Download your signed IRS forms here:</p> <ul style="list-style-type: none">  1040 Delivery-2019-2018.pdf  <p>Thank you for using Taxdoor.</p> <p>Questions? Please contact William Hernandez at: (714) 909-2425 or whernandez@orionlending.com © 2020 Covius Mortgage Solutions, LLC</p> </div>
<p>Congratulations – the Tax Transcripts have been authorized to be ordered by Orion Lending!</p>	

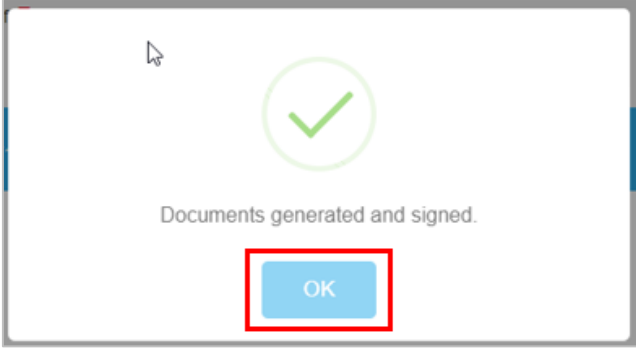
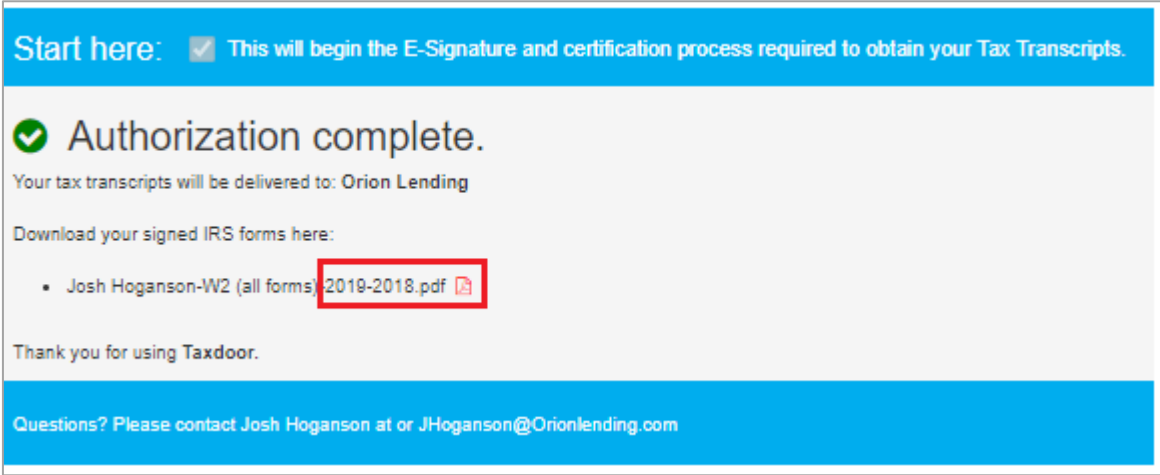
Desktop Version

Step	Action
<p>1.</p>	<p>Open the email from Orion Lending <notice@taxdoor.com> E-Signature Request and Click the link provided.</p> <div data-bbox="407 531 1362 747" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <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?43ea894e</p> <p>If you have any questions, please contact me.</p> </div> <p>Note: You can also complete this on a cell phone if you receive email on your mobile device.</p>
<p>2.</p>	<p>Check the box in the Start Here bar.</p> <div data-bbox="358 1003 1411 1247" style="border: 1px solid gray; padding: 10px; margin: 10px 0;">  <p>Start here: <input type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> <p>I do not want to participate in E-signing. Please cancel my order. <input type="button" value="Cancel"/></p> </div> <p>Note: Selecting Cancel anytime throughout the process will cancel the entire order and you will need to contact your Orion Representative to issue another request.</p>
<p>3.</p>	<p>Enter your Social Security Number, and click Verify.</p> <div data-bbox="407 1503 1362 1810" style="border: 1px solid gray; padding: 10px; margin: 10px 0;">  <p>Start here: <input checked="" type="checkbox"/> This will begin the E-Signature and certification process required to obtain your Tax Transcripts.</p> <p>This is an electronic authorization to allow Orion Lending to access your tax information from the IRS for: Josh Hoganson</p> <p>Verify Social Security Number</p> <p>ENTER MISSING DIGITS AND CLICK VERIFY</p> <p><input type="text"/> - <input type="text"/> - 5555 <input type="button" value="verify"/></p> </div>

Step	Action						
<p>4.</p>	<p>Confirm your Current Address, and click Verify to confirm the address is accurate, or Edit to make changes.</p> <div data-bbox="337 365 1433 842"> </div> <table border="1" data-bbox="305 890 1464 1073"> <thead> <tr> <th data-bbox="305 890 885 940">If</th> <th data-bbox="885 890 1464 940">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="305 940 885 1022">If you identify a discrepancy in the address</td> <td data-bbox="885 940 1464 1022">Proceed to step 5.</td> </tr> <tr> <td data-bbox="305 1022 885 1073">If there are no discrepancies</td> <td data-bbox="885 1022 1464 1073">Proceed to step 6.</td> </tr> </tbody> </table>	If	Then	If you identify a discrepancy in the address	Proceed to step 5.	If there are no discrepancies	Proceed to step 6.
If	Then						
If you identify a discrepancy in the address	Proceed to step 5.						
If there are no discrepancies	Proceed to step 6.						
<p>5.</p>	<p>Enter your correct Current Address and click Save and Verify.</p> <div data-bbox="542 1213 1224 1570"> </div>						

Step	Action																						
<p>6.</p>	<p>Confirm your Tax Return Addresses, and click Verify to confirm the address is accurate, or Edit to make changes.</p> <div data-bbox="313 363 1458 594" style="border: 1px solid #ccc; padding: 10px;"> <p>Verify Tax Return Addresses</p> <table border="0"> <tr> <td style="font-size: small;">TAX YEAR</td> <td style="font-size: small;">ADDRESS USED ON TAX RETURN</td> <td style="text-align: right; font-size: small;">edit</td> <td style="text-align: right; font-size: small;">verify</td> </tr> <tr> <td>2016</td> <td>4321 Cul de Sac St Someplace, MA 02723</td> <td></td> <td></td> </tr> <tr> <td style="font-size: small;">TAX YEAR</td> <td style="font-size: small;">ADDRESS USED ON TAX RETURN</td> <td style="text-align: right; font-size: small;">edit</td> <td style="text-align: right; font-size: small;">verify</td> </tr> <tr> <td>2015</td> <td>1234 Main Street Anyplace, CA 92651</td> <td></td> <td></td> </tr> </table> </div> <table border="1" data-bbox="305 642 1464 825" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; text-align: center;">If</th> <th style="width: 50%; text-align: center;">Then</th> </tr> </thead> <tbody> <tr> <td>If you identify a discrepancy in the address</td> <td>Proceed to step 7 and 8.</td> </tr> <tr> <td>If there are no discrepancies</td> <td>Proceed to step 9.</td> </tr> </tbody> </table>	TAX YEAR	ADDRESS USED ON TAX RETURN	edit	verify	2016	4321 Cul de Sac St Someplace, MA 02723			TAX YEAR	ADDRESS USED ON TAX RETURN	edit	verify	2015	1234 Main Street Anyplace, CA 92651			If	Then	If you identify a discrepancy in the address	Proceed to step 7 and 8.	If there are no discrepancies	Proceed to step 9.
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If there are no discrepancies	Proceed to step 9.																						
<p>7.</p>	<p>Confirm you address for that Tax Year is correct, click Save & Verify to confirm the address is accurate, or uncheck the Copy address from current address to update.</p> <div data-bbox="545 1037 1219 1373" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Enter home address for tax year 2019 ✕</p> <p><input checked="" type="checkbox"/> Copy address from current address.</p> <p>770 The City Drive South Orange, CA 92868</p> <p style="text-align: right;"> Close Save & Verify </p> </div>																						
<p>8.</p>	<p>Update your Address for Tax Year and click Save & Verify</p> <div data-bbox="574 1518 1190 1881" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Enter home address for tax year 2019 ✕</p> <p><input type="checkbox"/> Copy address from current address.</p> <div style="border: 2px solid red; padding: 2px;"> <p>770 The City Drive South</p> <p>92868 Orange California ▼</p> </div> <p style="text-align: right;"> Close Save & Verify </p> </div>																						

Step	Action												
9.	<p>Once you have confirmed all addresses, click the I Agree to use Electronic Records & Signatures.</p> <div data-bbox="396 373 1370 638" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">Verify Tax Return Addresses</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; font-size: small;">TAX YEAR</td> <td style="width: 60%; font-size: small;">ADDRESS USED ON TAX RETURN</td> <td style="width: 25%; text-align: center; vertical-align: middle;">✓</td> </tr> <tr> <td>2019</td> <td>770 The City Drive South Orange, CA 92868</td> <td></td> </tr> <tr> <td style="font-size: small;">TAX YEAR</td> <td style="font-size: small;">ADDRESS USED ON TAX RETURN</td> <td style="text-align: center; vertical-align: middle;">✓</td> </tr> <tr> <td>2018</td> <td>770 The City Drive South Orange, CA 92868</td> <td></td> </tr> </table> <div style="background-color: #00a0e3; color: white; padding: 5px; text-align: center; margin-top: 10px;"> <input style="border: 2px solid red; width: 20px; height: 15px; vertical-align: middle;" type="checkbox"/> I agree to use Electronic Records & Signatures </div> </div>	TAX YEAR	ADDRESS USED ON TAX RETURN	✓	2019	770 The City Drive South Orange, CA 92868		TAX YEAR	ADDRESS USED ON TAX RETURN	✓	2018	770 The City Drive South Orange, CA 92868	
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10.	<p>Add your e-signature by selecting the, I authorize Orion Lending to order 4506-T and sign now button.</p> <div data-bbox="344 823 1425 1335" style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <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><small>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.</small></p> <p><small>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.</small></p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <div style="border: 2px solid green; padding: 5px; background-color: #00a0e3; color: white; text-align: center;">I authorize Orion Lending to order 4506-T and sign now</div> <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0; text-align: center;">Cancel</div> </div> </div> <ul style="list-style-type: none"> You must scroll through the entire agreement to authorize your e-signature. Reminder: Selecting Cancel anytime throughout the process will cancel the entire order and you will need to contact your Orion Representative to issue another request. 												

Step	Action
11.	<p>Click OK to confirm that Documents have been generated and signed.</p> 
12.	<p>Click on the PDF Icon to view a copy of the generated 4506-T.</p> 
<p style="text-align: center;">Congratulations – the Tax Transcripts have been authorized to be ordered by Orion Lending!</p>	