Encompass Integration User Guide

TSV & TRV® Services (Powered by NCS, Inc.)

This User Guide demonstrates to Lenders how to access our services.

Encompass Desktop plans to sunset its legacy SDK platform in October 2025. *TRV*® Service is now TSV™ on Encompass Web.

Contents

Overview

This Encompass User Guide is intended to provide step-by-step instructions for End Users in accessing **TSV**™ from within Encompass Partner Connect Integration (also referred as EPC or Encompass Web). TSV (powered by NCS) includes services like TRV Services (8821 and 4506-C tax transcripts), SSV Services (SSA-89), and VOE Services (employment & income verification).

This user guide will help outline how to:

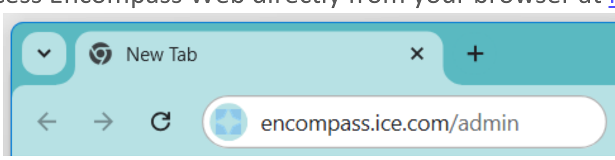
- enable Encompass Web interface from the Encompass Desktop application
- access Encompass Web through the Encompass Desktop application and Web Browser
- order any TSV verification service from Encompass Web

Accessing Encompass Web

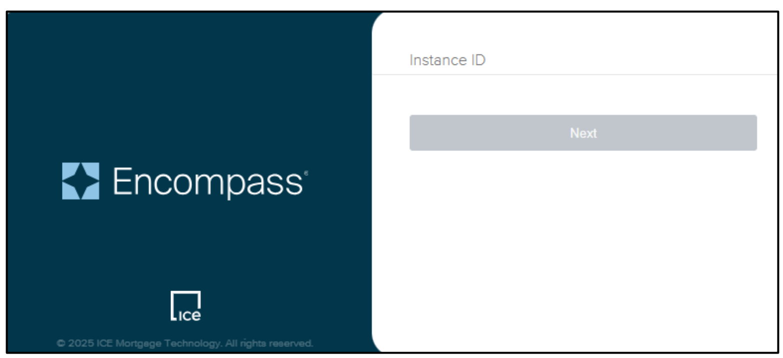
NOTE: Please ensure that Encompass Web is enabled and TSV™ is added as a Service Provider. For assistance, please contact your Encompass Administrator. If you are an Administrator, please see the **Administrator Instructions** section.

Accessing Encompass Web from a Web Browser

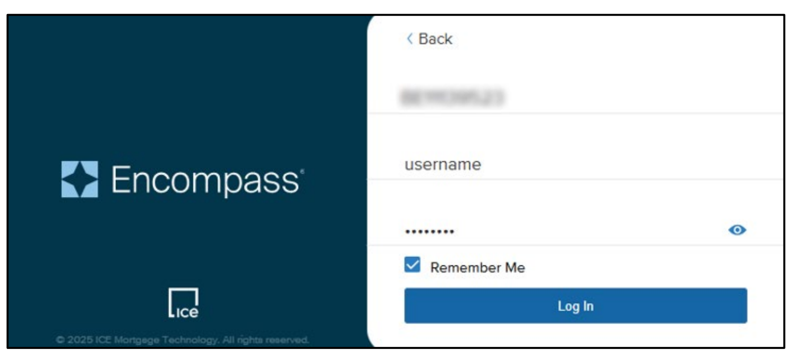
1. Access Encompass Web directly from your browser at https://encompass.ice.com/admin



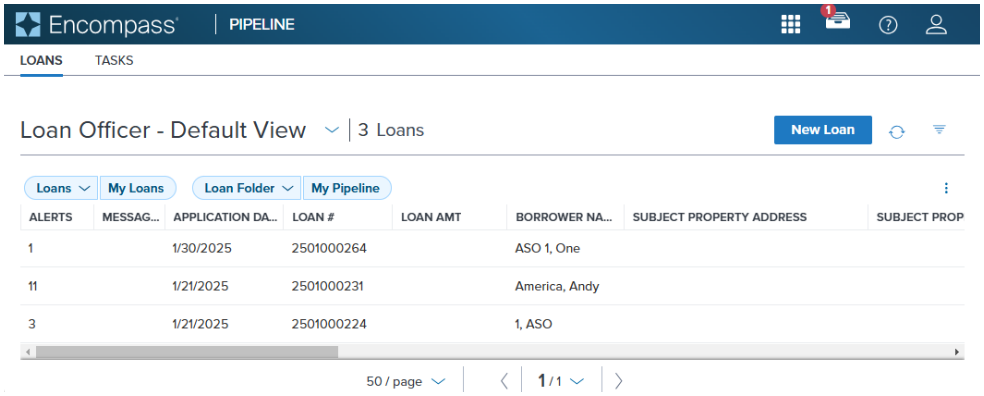
2. Input your Instance ID and click **Next**.



3. Input your username and password and **Log In**.

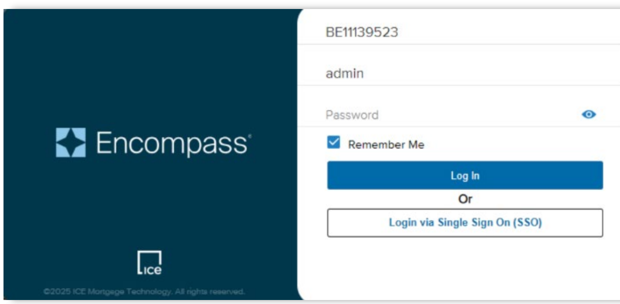


4. By default, you'll now see your **Pipeline**.

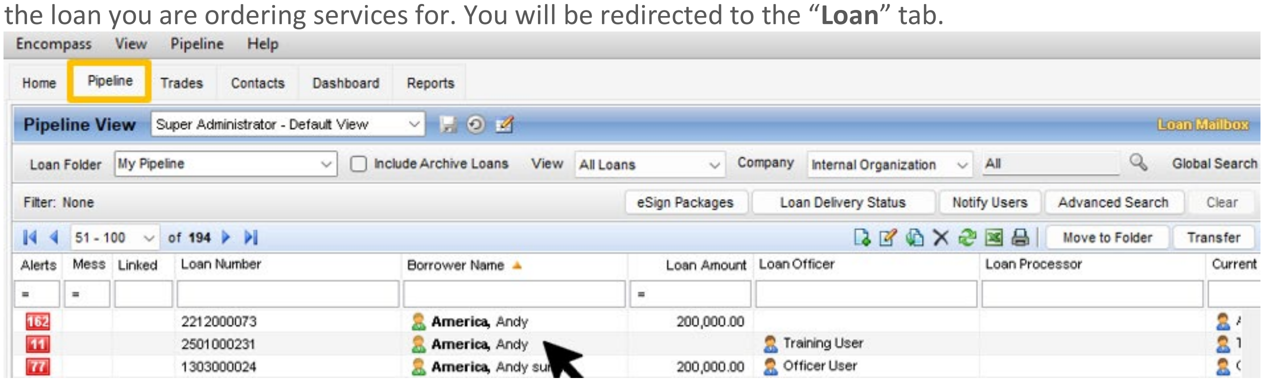


Accessing Encompass Web from Encompass Desktop

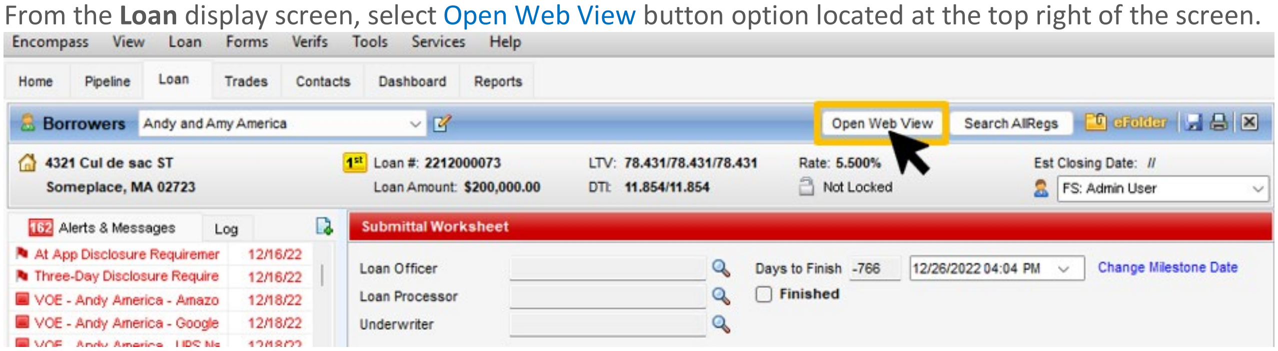
1. Login to Encompass using your account credentials from your Encompass Desktop.



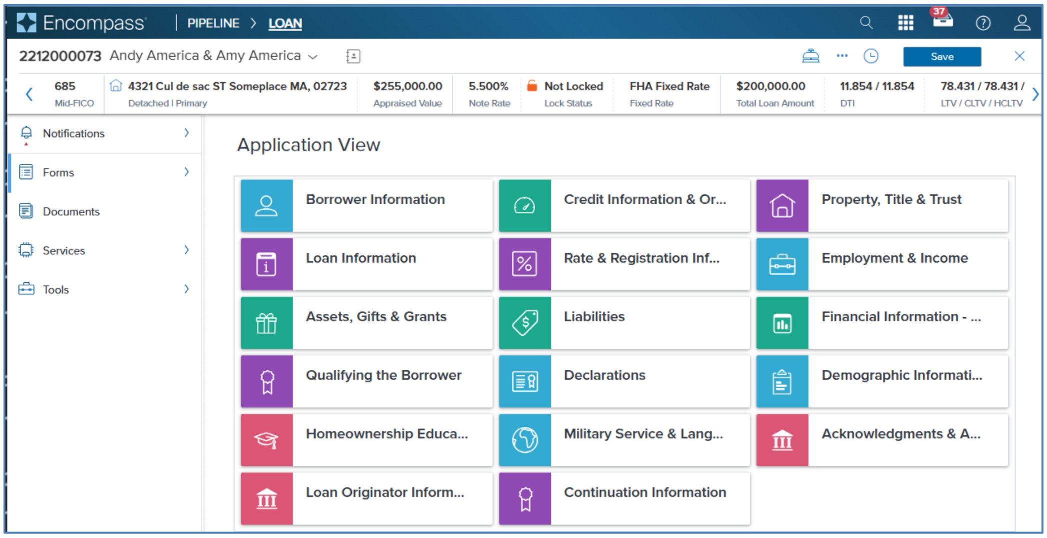
2. From the 'Home' default screen, select the"**Pipeline**" tab to view the loans in your queue. Double click the loan you are ordering services for. You will be redirected to the "**Loan**" tab.



3. From the **Loan** display screen, select Open Web View button option located at the top right of the screen.



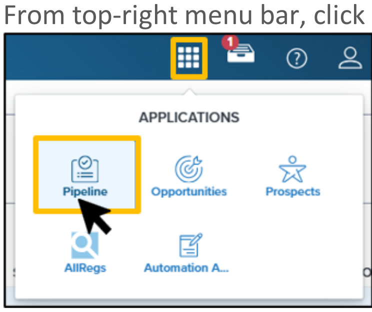
4. In your web browser, a new window or tab will open directly to the **Application View** in your **Pipeline**.



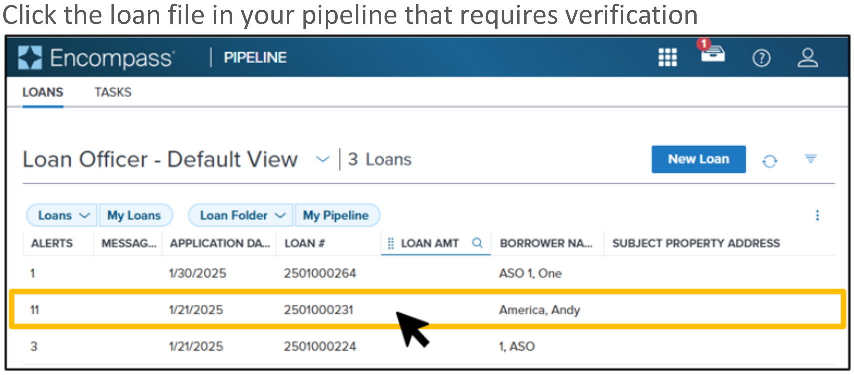
Order TSV Products from Encompass Web

IMPORTANT!: Make sure your borrower's loan file is fully complete. The ordering screens will populate the borrower(s)' information based on this. If required fields are missing data, you will need to update the loan file.

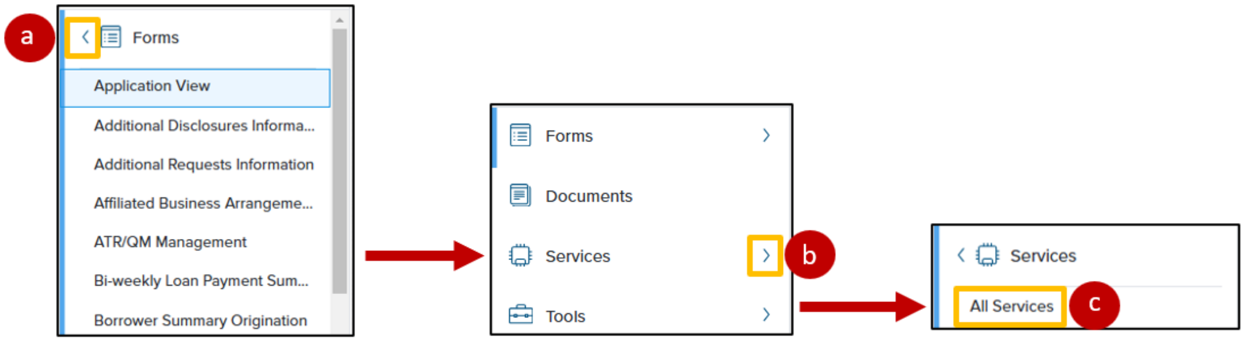
5. From top-right menu bar, click on the grid icon and select '**Pipeline**'.



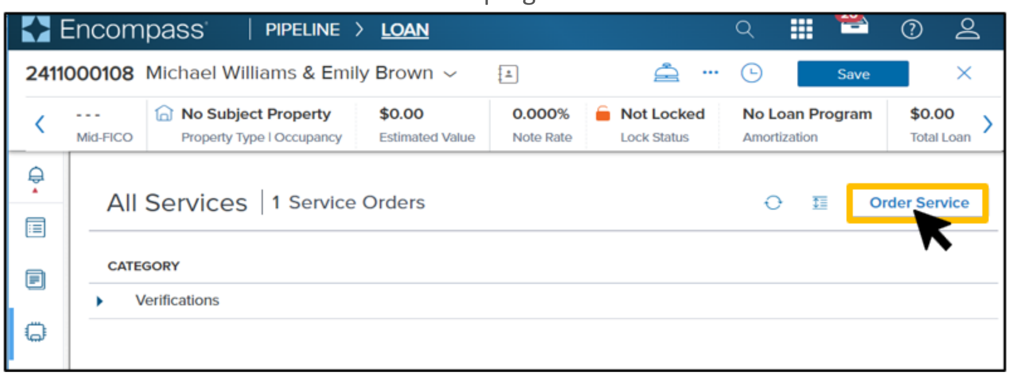
6. Click the loan file in your pipeline that requires verification



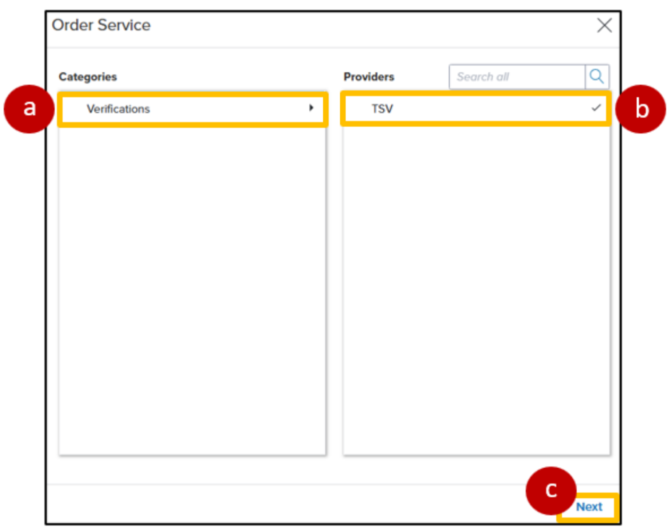
7. You will then be redirected to the **Application View** dashboard. Collapse the **Forms** menu by clicking the "<" icon **(a),** expand the **Services** menu by clicking the ">" icon **(b)**, then select **All Services (c)**.



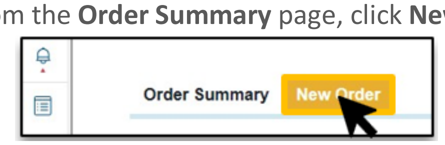
8. Click on **'Order Service'** button on the top right side of the screen.



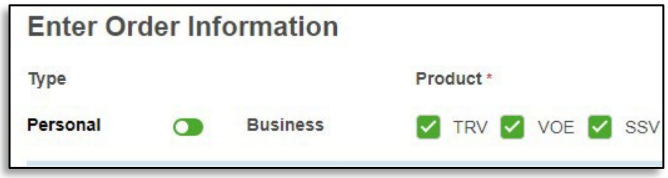
9. When pop-up window appears, select '**Verifications**' under **Categories (a)**, select '**TSV'** under **Providers (b)**, then click '**Next**' **(c)** to be redirected to the **Order Summary** page.



10. From the **Order Summary** page, click **New Order** tab.



11. Select *Type* of verification (personal or business) and *Product* (TRV, SSV, and/or VOE). Click **Next**.



Ordering TRV (Tax Return Verifications)

We offer 4506-C and 8821 for tax return verifications. We will show you steps for each processing option.

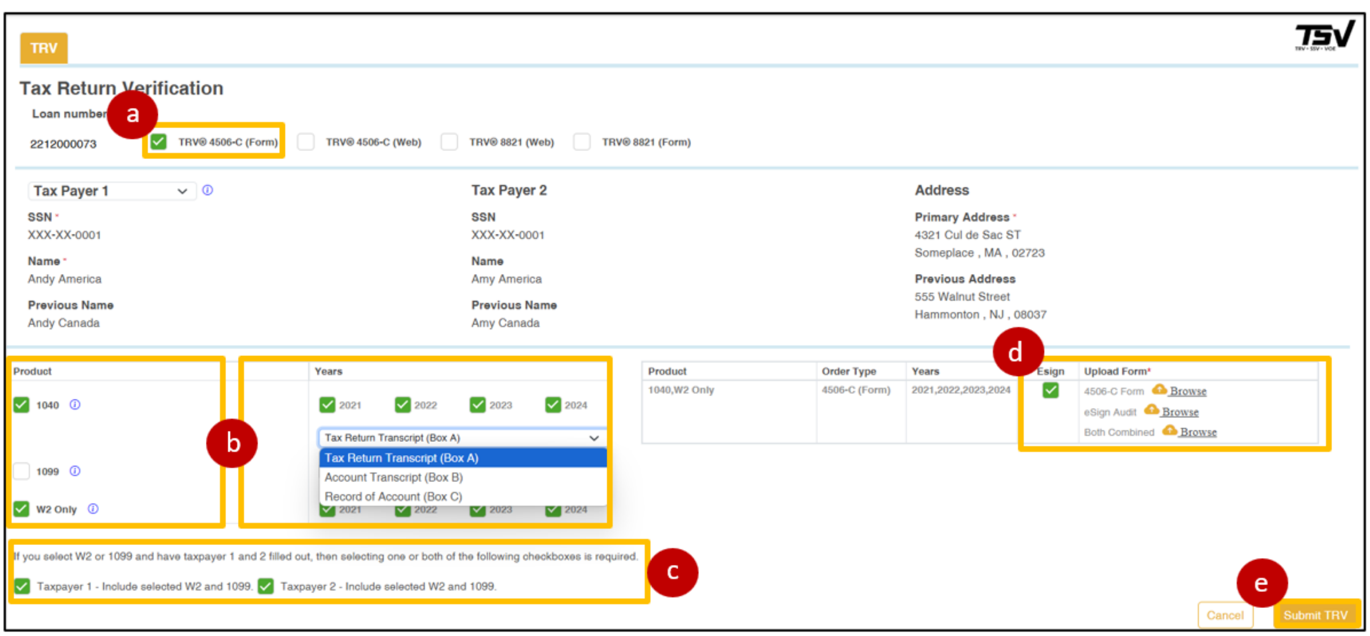
TRV® Services 4506-C (Form) and ***TRV*® Services 8821 (Form)** will require you to upload the completed and signed form. **TRV® Services 4506-C (Web)** requires no forms. ***TRV*® Services 8821 (Web)** requires a Consumer Authorization form. The Web versions for both 4506-C and 8821 require the Borrower/Taxpayer to create an IRS online account via ID.me. Turn time for Web orders are near-instant after Taxpayer authorization.

NOTE: *The instructions below show ordering a single product. Within our unified ordering UI, you may order multiple products and product types in a single submission by selecting all products and product types you require.* Ordering both 4506-C and/or 8821 (**Form and Web**) **options** could result in duplicate transcripts. The ordering UI will autopopulate borrower and employer information from the loan file. If required input detail is missing, you will need to update the loan file to include that information.

TRV® 4506-C (Form)

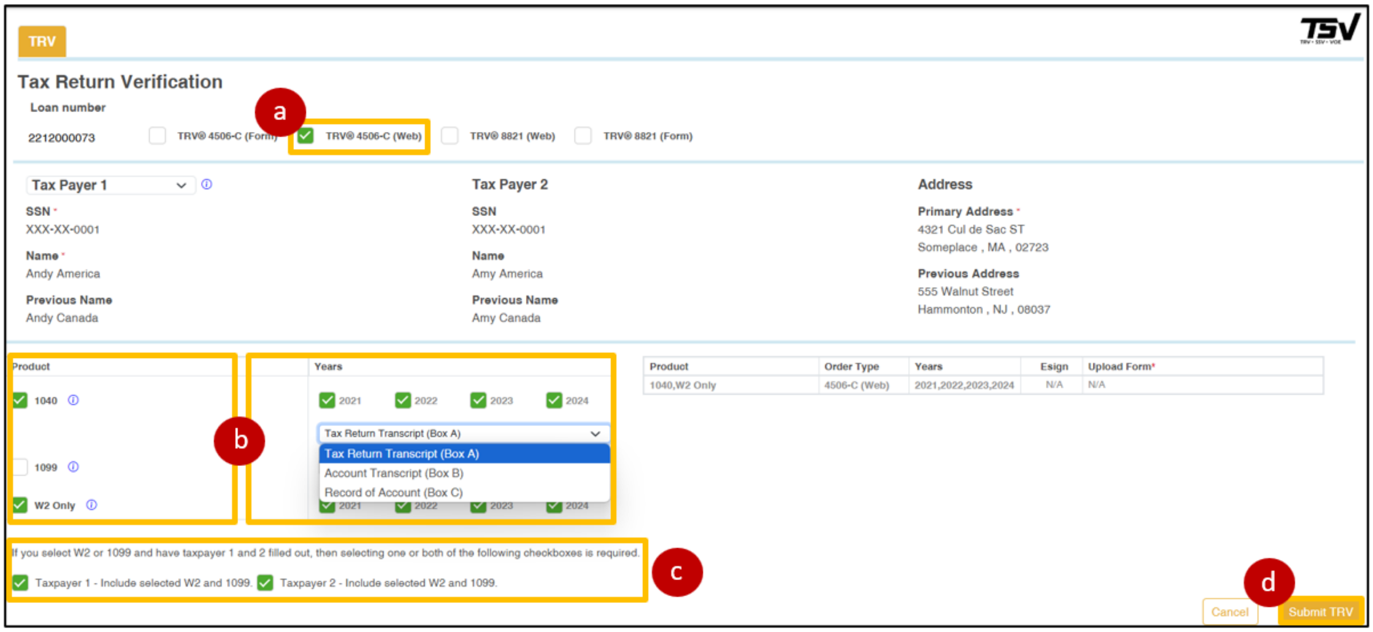
Select **TRV® 4506-C (Form)** **(a)**, select your desired **Product**(s) and **Years** (for **1040**, also select your **Trancript Type**) **(b)**, if ordering W2s and/or 1099s, select the Taxpayers you'd like to order them for **(c)**, then upload your 4506-C form that matches your order details (if 4506-C form is e-signed, check the Esign box and upload your Certification of Completion COC Audit Trail)* **(d)**** and Sumbit **(e)**.

*NOTE: For e-signed 4506-C Forms, you can upload the 4506-C Form and COC Audit Trail seperately, or as a combined PDF.
**NOTE: See 'Uploading Your Form' for more detail.



TRV® 4506-C (Web)

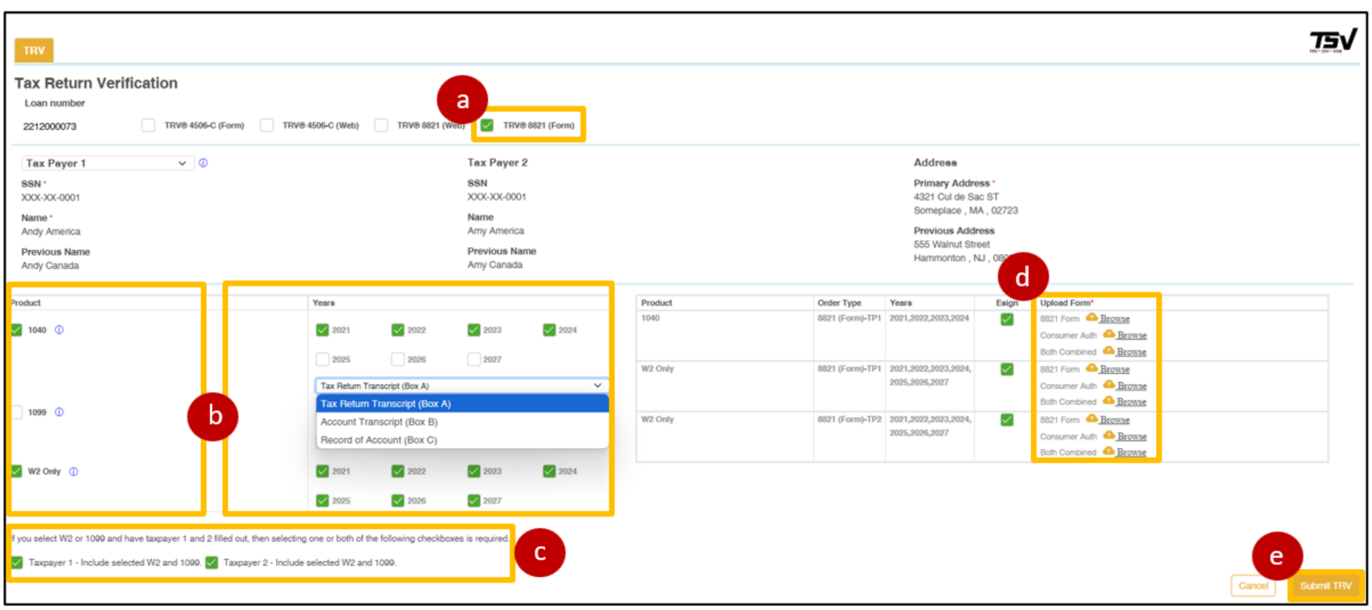
Select **TRV® 4506-C (Web)** **(a)**, select your desired **Product**(s) and **Years** (for **1040**, also select your **Trancript Type** **(b)**, if ordering W2s and/or 1099s, select the Taxpayers you'd like to order them for **(c)** and Sumbit **(d)**.



TRV® 8821 (Form)

Select **TRV® 8821 (Form)** **(a)**, select your desired **Product**(s) and **Years** (for **1040**, also select your **Trancript Type**) **(b)**, if ordering W2s and/or 1099s, select the Taxpayers you'd like to order them for **(c)**, upload your 8821 form(s) that match your order details and the Consumer Authorization form for each Taxpayer being requested* **(d)**** and Sumbit **(e)**.

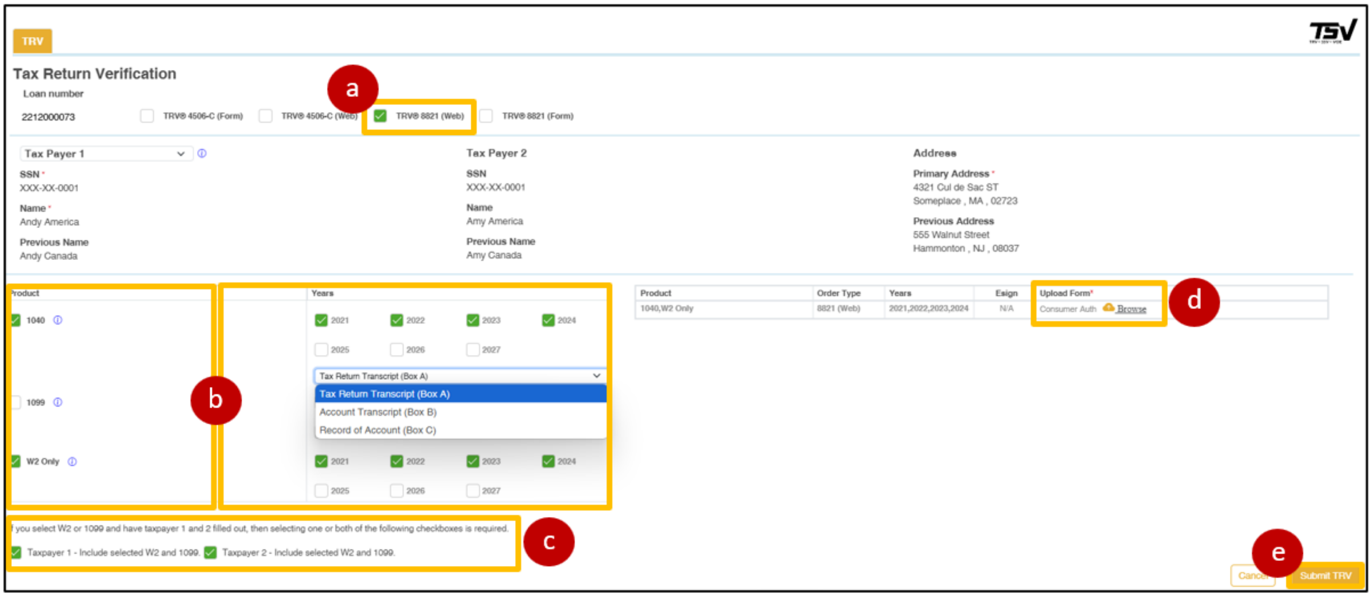
***NOTE:** You can upload your 8821 Form(s) and Consumer Authorization Form(s) separate or combined. 8821 Form **must be** e-signed.
****NOTE**: See '[Uploading Your Form](#)' for more detail.



TRV® 8821 (Web)

Select **TRV® 8821 (Web) (a)**, select your desired **Product**(s) and **Years** (for **1040**, also select your **Trancript Type**) **(b)**, if ordering W2s and/or 1099s, select the Taxpayers you'd like to order them for **(c)**, upload the Consumer Authorization form(s) **(d)***, and Sumbit **(e)**.

*__NOTE__: See 'Uploading Your Form' for more detail.

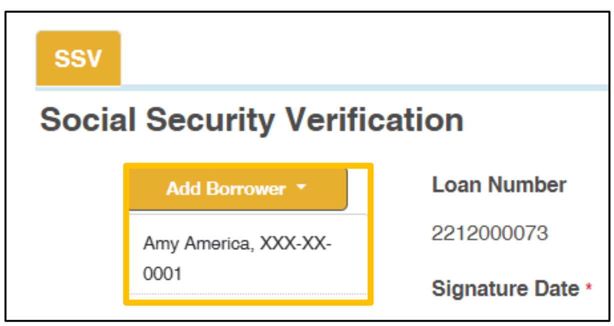


Ordering SSV (SSA-89)

Input **Signature Date (a)**, select the **Signature Type (b)**, upload the SSA-89 form by click the **Browse** button **(c)***, and **Submit SSV (d)**.

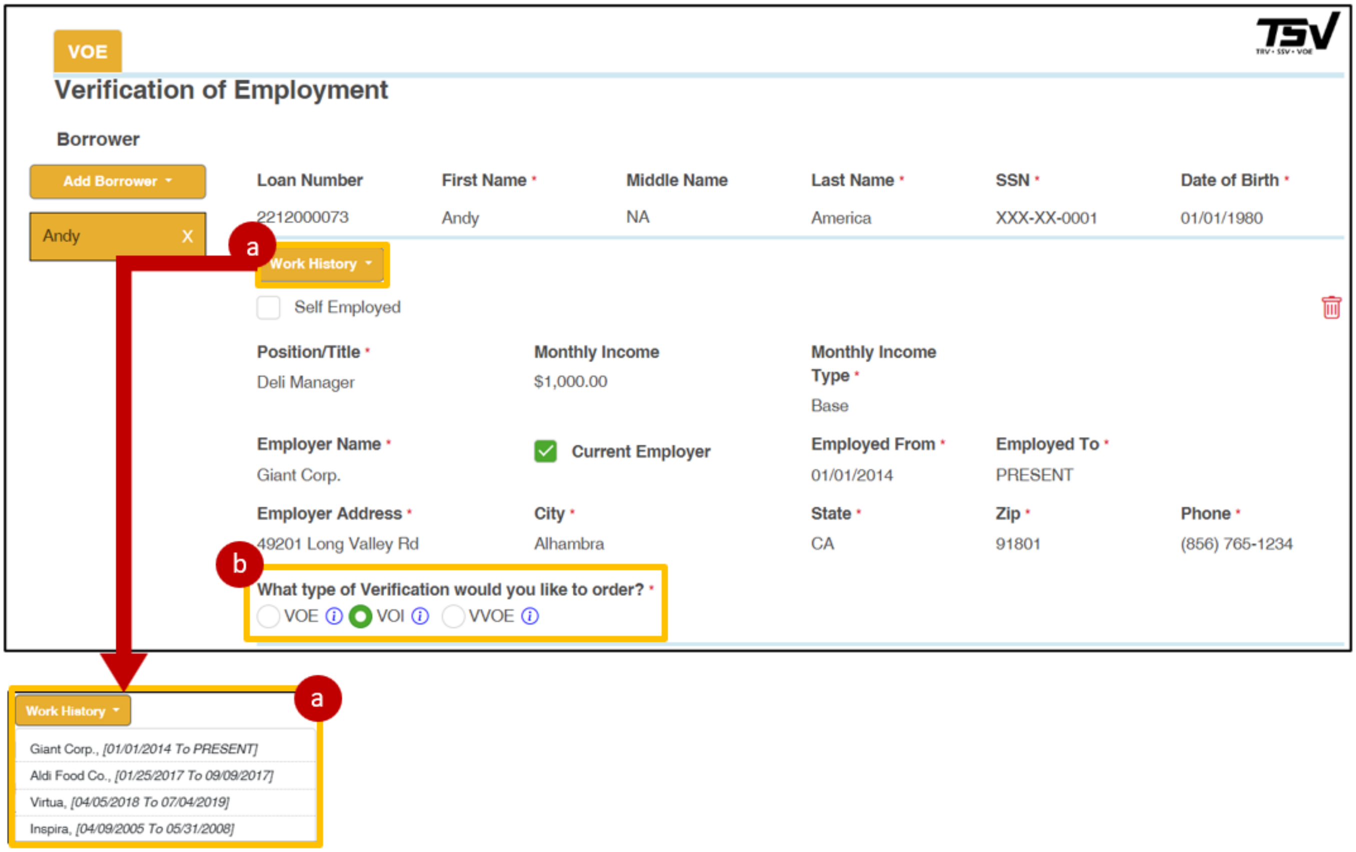
*__NOTE__: See 'Uploading Your Form' for more detail.

To order an SSV for the Co-Borrower, select **Add Borrower** and select the Co-Borrower, then repeat steps **(a) – (c)** above.



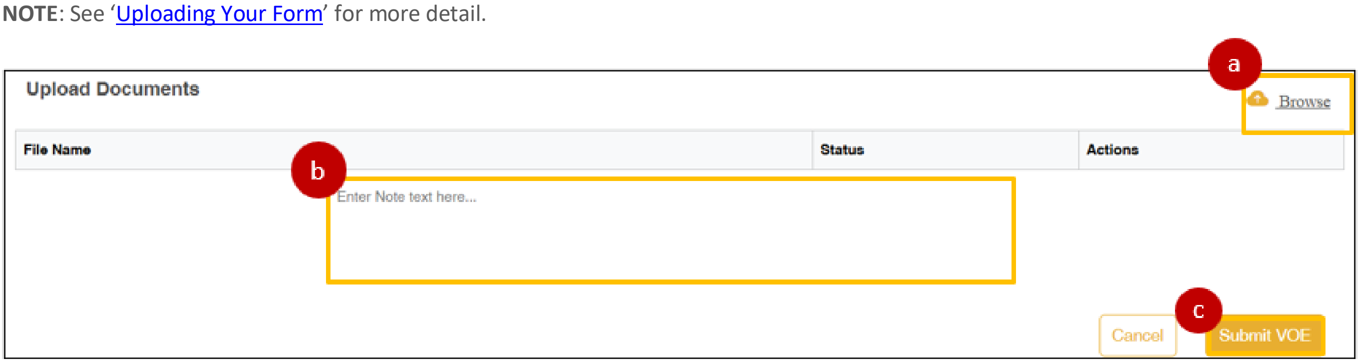
Ordering VOE (Verification of Employment & Income)

Select the desired employer(s) from the **Work History** dropdown menu **(a)**, then select the desired **Verification Product** for that employer **(b)**.

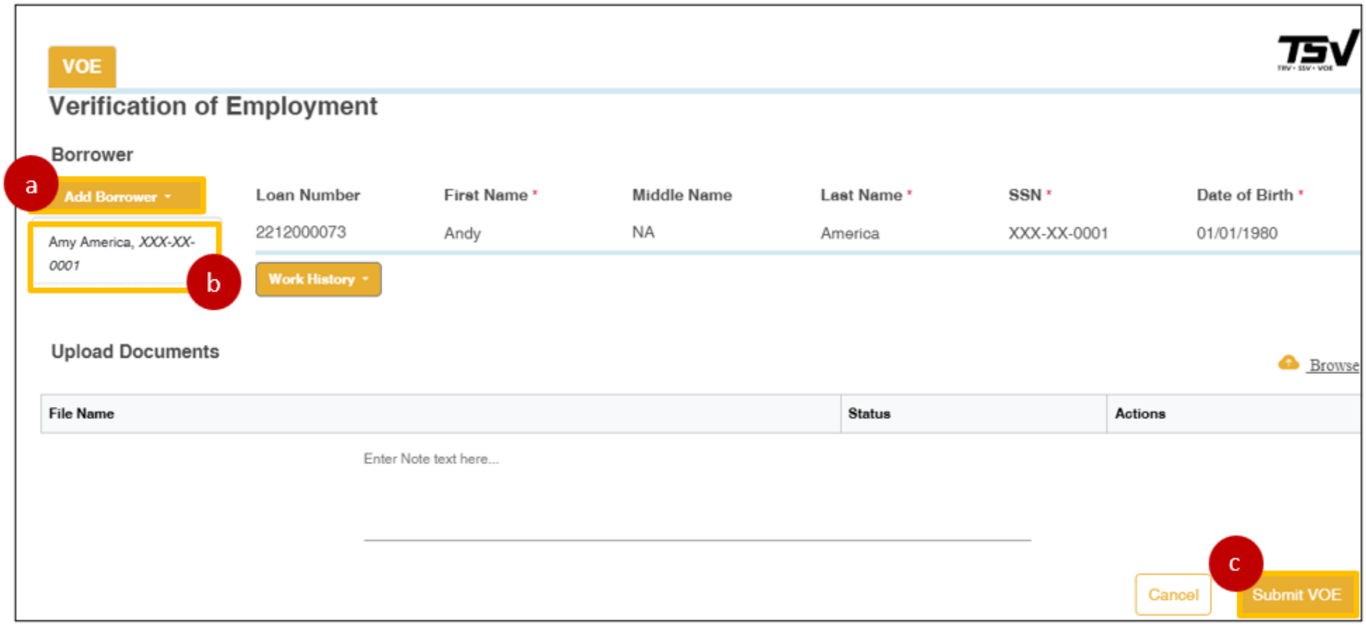


Browse for the **Borrower Authorization**(s) **(a)***, enter any pertinent **Order Notes** **(b)**, then **Submit VOE** **(c)**.

*__NOTE__: See '[Uploading Your Form](#)' for more detail.



To add a Co-Borrower, select the dropdown arrow in **Add Borrower (a)**, then select the **Co-Borrower (b)**, and repeat the steps above, then **Submit (c)**.

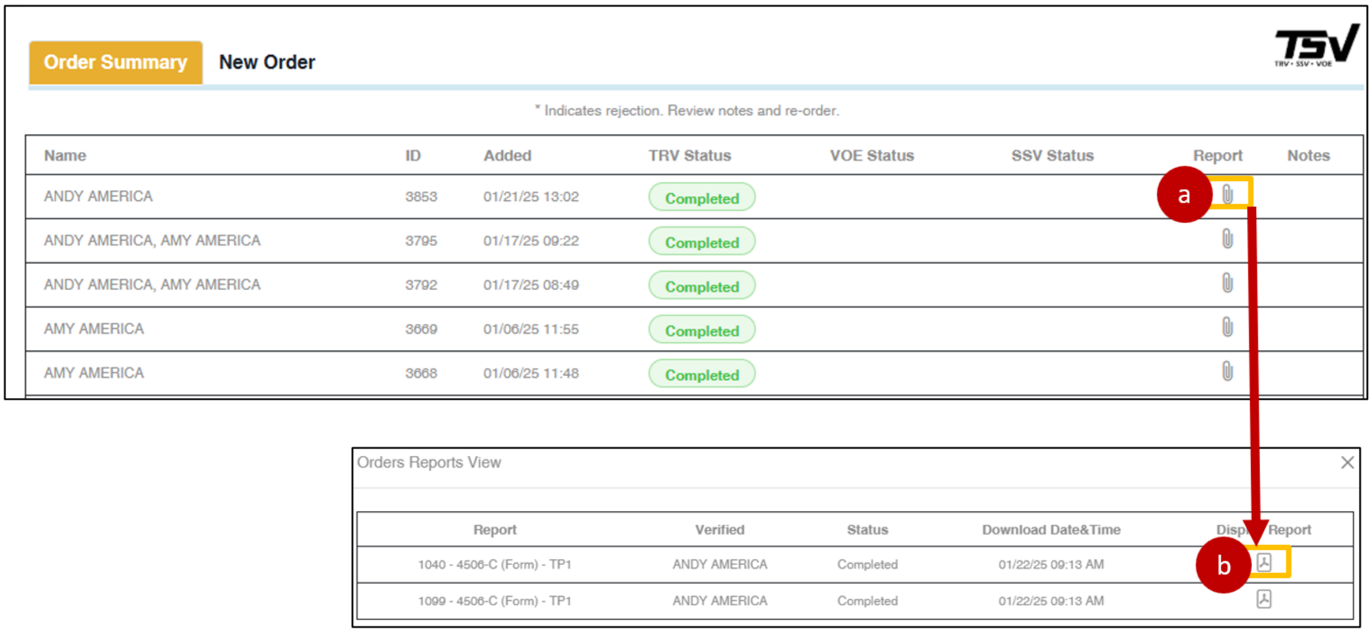


Uploading Your Form

You have the option to select the the form from your eFolder **(a)**, drag and drop the form from your computer **(b)**, or select Local Drive and upload the form from your computer **(c)** then **Upload (d)**.

Accessing Completed Orders

To check the status of your orders and access completed orders, open the **Loan**, select to **Order Service**, select your **Category** (Verifications) and **Provider** (TSV), and click **Next**. This will open the **Order Summary** tab, locate the order you would like to view. If the order is complete, click on the **Paperclip Icon (a)**, then the **Adobe Icon (b)** to view and download the report.

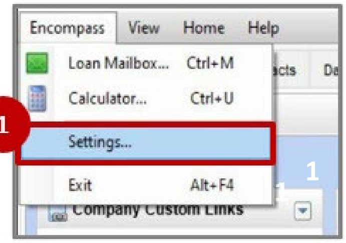


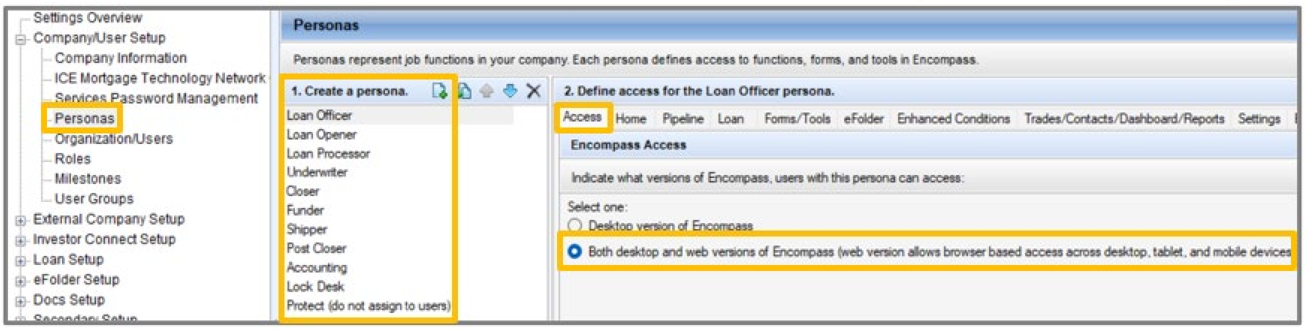
Administrator Instructions

Enabling Encompass Web Access

1. Click on the Encompass tab from the top navigation bar and click '**Settings…**'.

2. Under Company/User Setup, select Personas. Under each Persona within the Access tab, ensure that "**Both desktop and web versions**…" is selected.

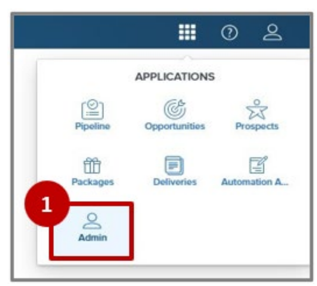




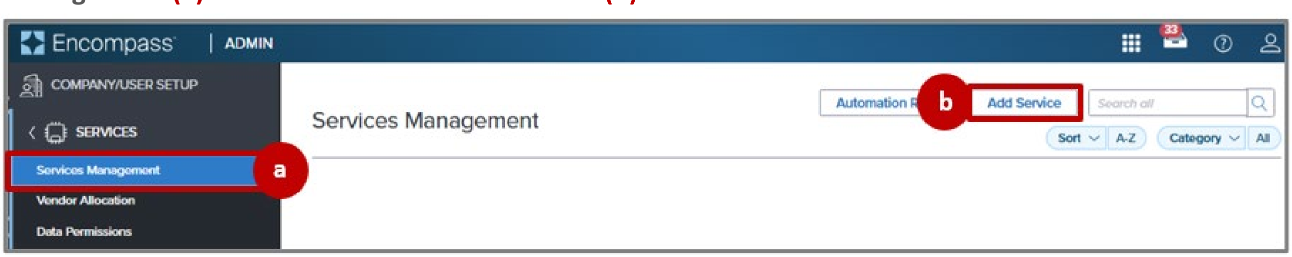
3. To adjust additional company account settings for Encompass Web (EPC), navigate back to Settings Overview and click the Web Version Settings hyperlink to open the Encompass Web Admin Portal.

Adding TSV™ as a Service Provider

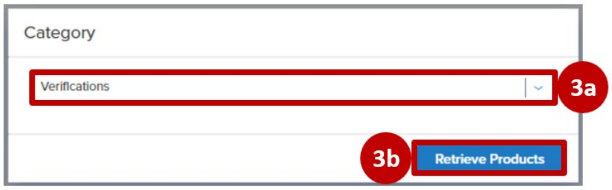
1. Open the Web Version Settings hyperlink shown above, or log into https://encompass.ice.com/ and select **Admin** from the menu at the top right.



2. From the menu on the left of the page, under the **Services** dropdown options, select **Services Management (a)** and click the **Add Service** button **(b)**.



3. In the Category dropdown select Verifications **(a)** then click Retrieve Products **(b)**.



4. Scroll or Search **(a)** until you see **TSV** and select the **Manual** button **(b)**.

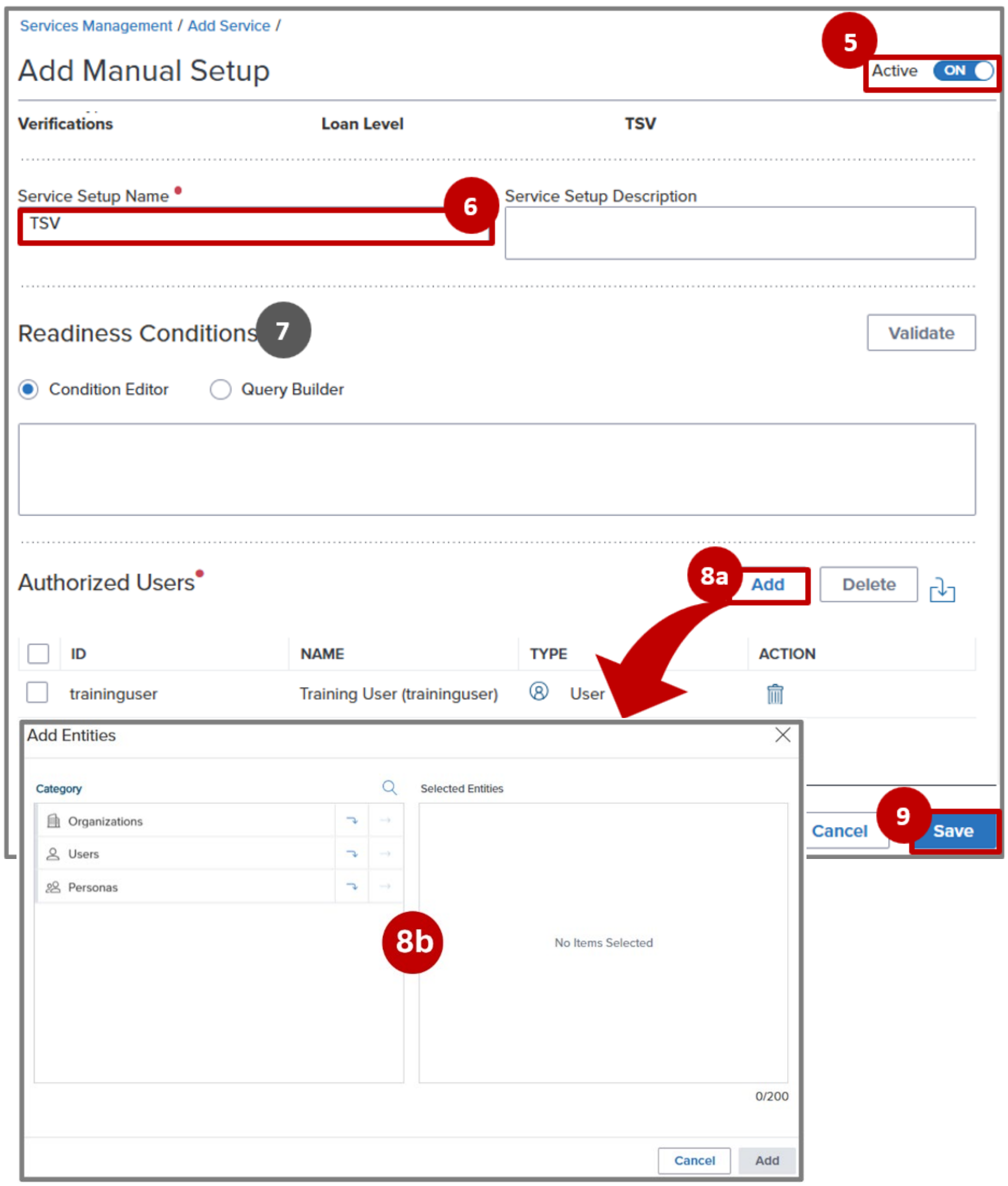
5. In the top right, toggle **Active** to **ON**.

6. Under **Service Setup Name** input **TSV**.

7. **OPTIONAL**: Set your **Readiness Conditions**.

8. In the **Authorized Users** section, select **Add (a)**, and add the users who will be ordering products from TSV™ **(b)**.

9. **Save**



[Return to Ordering Instructions]

About TSV (Powered by NCS)

TSV™ is a total verification solution suite powered by NCS. Through the integration of ASO within Encompass, our verification services allow lenders to automate income (IRS Tax Transcripts 4506-C/8821), identity (SSN), and employment (VOE/I) processing.

TSV™ (formerly known as TRV® Services) is a total verification solution suite powered by NCS. Get easy-to-read reports that place quality source data in both detailed and summarized formats to facilitate decision-making. Through the integration of automated service ordering (ASO) within Encompass, our verification services allow lenders to automate income (IRS Tax Transcripts), identity (SSN), and employment (VOE/I) processing. ASO modernizes the user experience, making service requests more efficient and significantly reducing the need for manual processes.

No other source provides the breadth of reports, performance analytics, and best turn time protection as NCS. We provide the expertise needed to navigate the intricacies of the IRS from 8821 to 4506-C (form and no form). We are a Day 1 Certainty authorized report supplier through Desktop Underwriter® & GSE compliant with the SSA (Social Security Administration).
TSV™ is powered by National Credit-reporting System, Inc. (NCS).

NCS (National Credit-reporting System, Inc.) is a leading information services company serving clients within the United States since 1978. The company provides cutting-edge, superior-quality, data-driven solutions that enable its clients to meet compliance requirements, minimize risk, and enhance profitability. NCS' solutions address risk in areas such as the ability to pay, credit history, identity, property valuation, and FEMA flood zone determinations. The company's headquarters is in Hammonton, NJ.

For further information about NCS, visit www.ncstrv.com or call (800) 582-7066.
