



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.

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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:

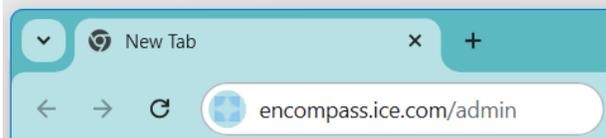
- enable Encompass Web interface from the Encompass Desktop application
- access Encompass Web through the Encompass Desktop application and Web Browser
- order any TSV verification service from Encompass Web

Accessing Encompass Web

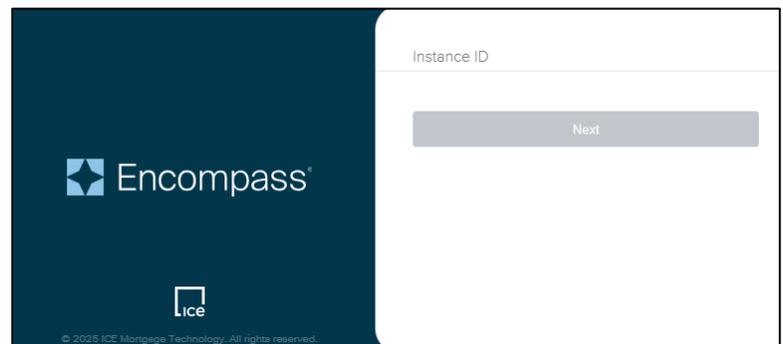
NOTE: Please ensure that Encompass Web is enabled and TSV™ is added as a Service Provider. For assistance, please contact your Encompass Administrator. If you are an Administrator, please see the [Administrator Instructions](#) section.

Accessing Encompass Web from a Web Browser

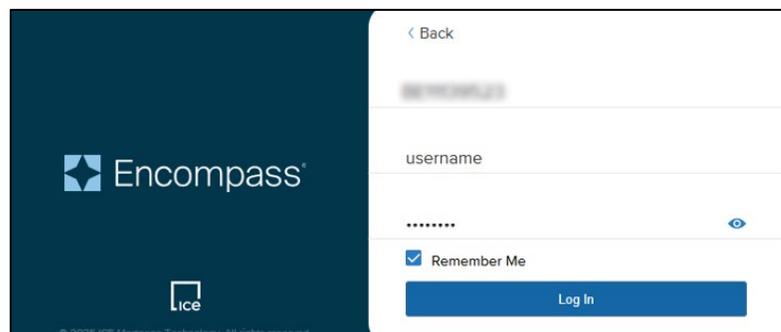
1. Access Encompass Web directly from your browser at <https://encompass.ice.com/admin>



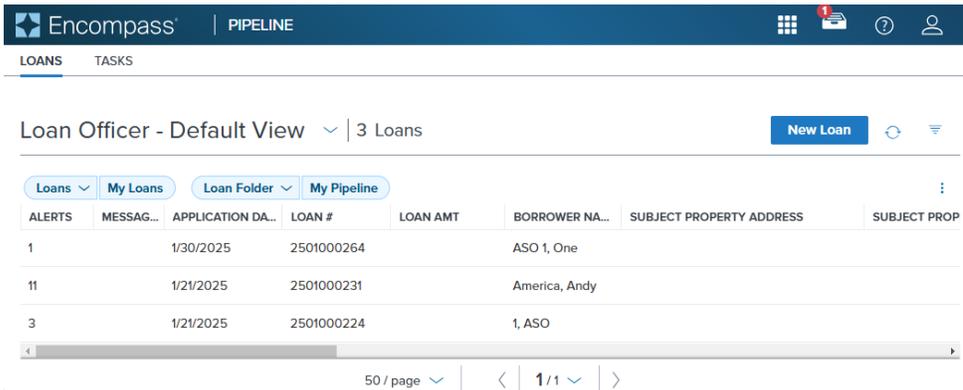
2. Input your Instance ID and click **Next**.



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

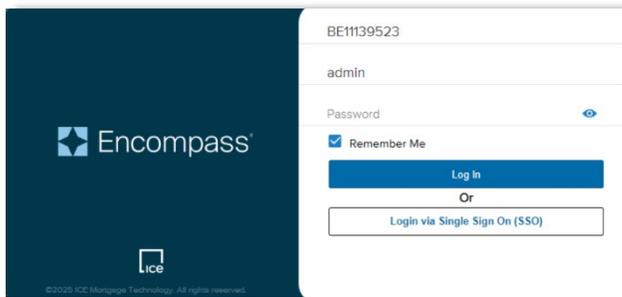


4. By default, you'll now see your **Pipeline**.

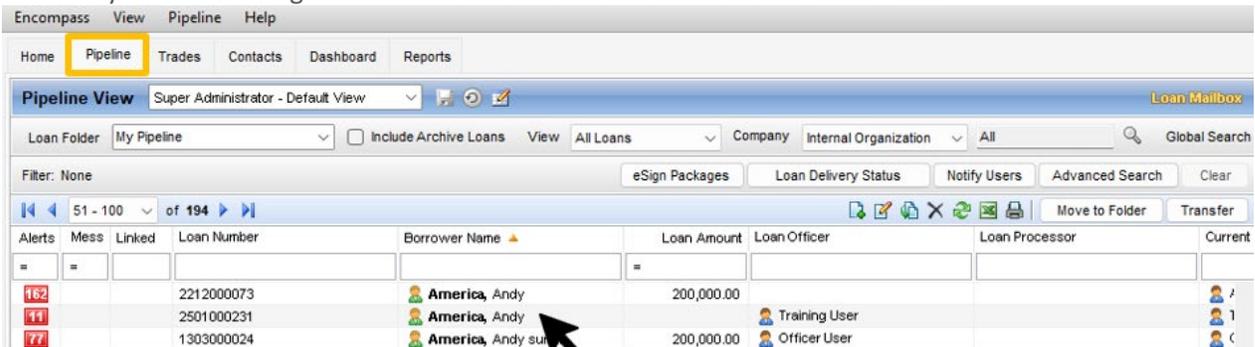


Accessing Encompass Web from Encompass Desktop

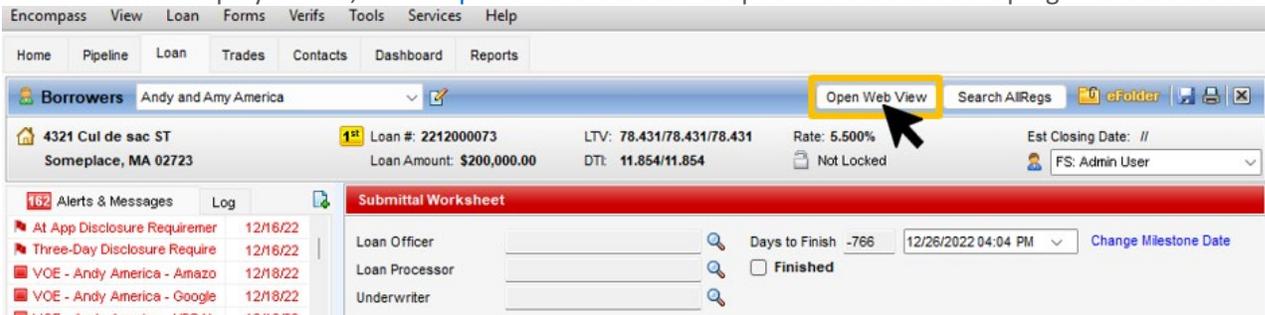
1. Login to Encompass using your account credentials from your Encompass Desktop.



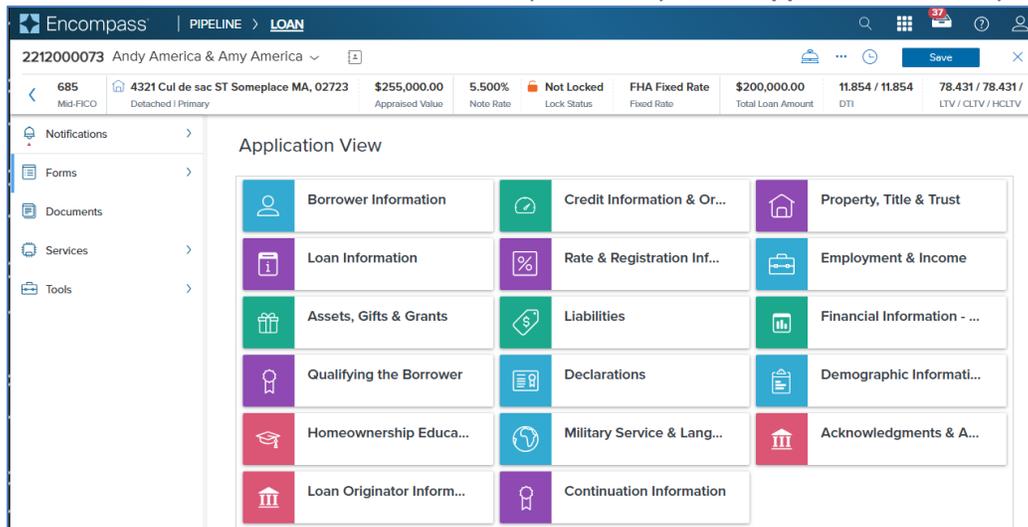
2. From the 'Home' default screen, select the "**Pipeline**" tab to view the loans in your queue. Double click the loan you are ordering services for. You will be redirected to the "**Loan**" tab.



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



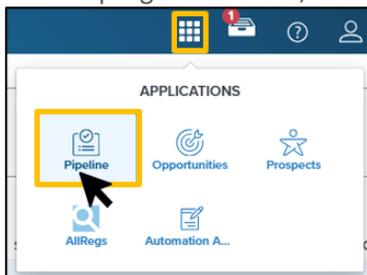
- In your web browser, a new window or tab will open directly to the **Application View** in your **Pipeline**.



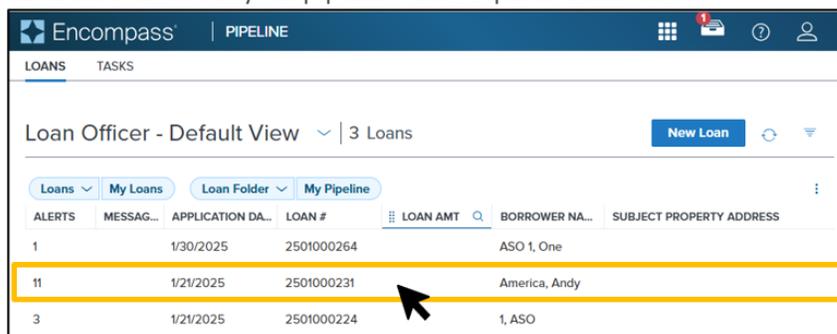
Order TSV Products from Encompass Web

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.

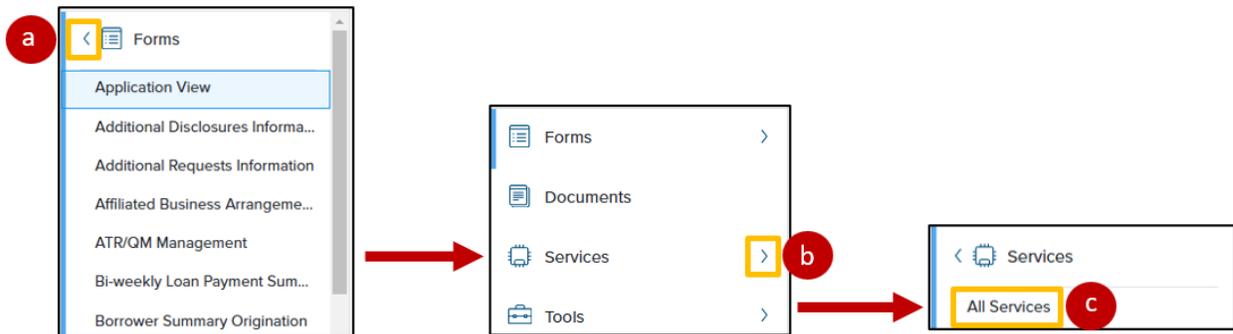
- From top-right menu bar, click on the grid icon and select 'Pipeline'.



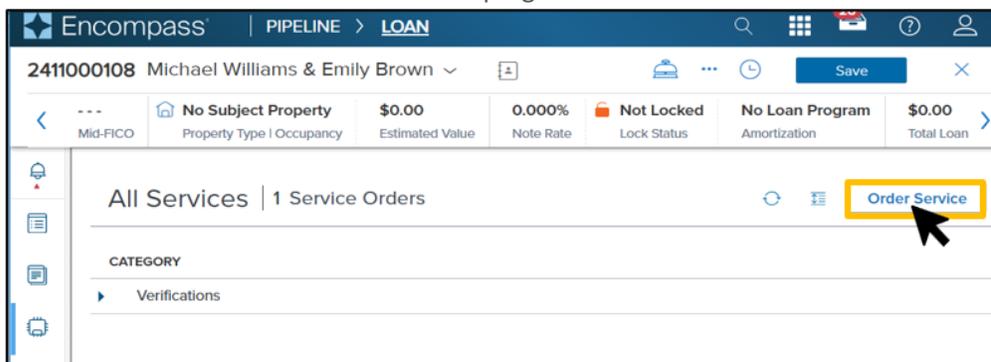
- Click the loan file in your pipeline that requires verification



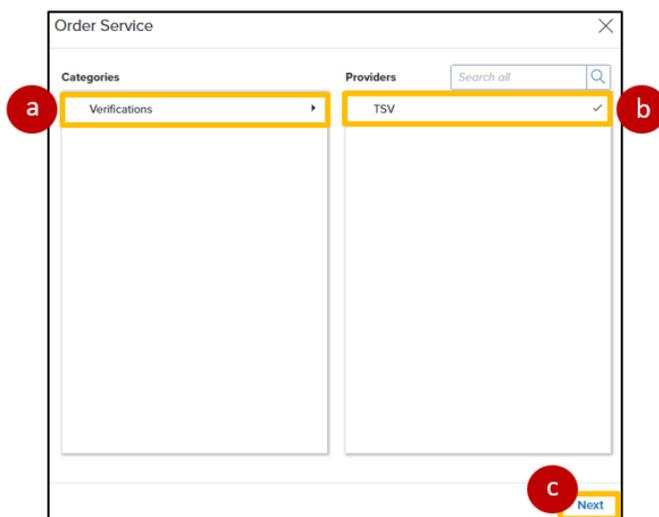
7. You will then be redirected to the **Application View** dashboard. Collapse the **Forms** menu by clicking the “<” icon **(a)**, expand the **Services** menu by clicking the “>” icon **(b)**, then select **All Services** **(c)**.



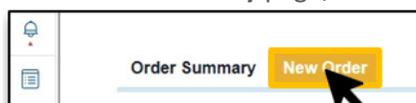
8. Click on ‘**Order Service**’ button on the top right side of the screen.



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**.

Enter Order Information

Type

Personal **Business**

Product *

TRV VOE SSV

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.

The screenshot shows the 'Tax Return Verification' form. Callout (a) points to the 'Loan number' field. Callout (b) points to the 'Product' and 'Years' selection areas. Callout (c) points to the 'Taxpayer 1' and 'Taxpayer 2' checkboxes. Callout (d) points to the 'Esign' and 'Upload Form*' sections. Callout (e) points to the 'Submit TRV' button.

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 Tax Return Verification

Loan number: 2212000073

TRV[®] 4506-C (Form)
 TRV[®] 4506-C (Web)
 TRV[®] 8821 (Web)
 TRV[®] 8821 (Form)

Tax Payer 1: SSN XXX-XX-0001, Name Andy America, Previous Name Andy Canada

Tax Payer 2: SSN XXX-XX-0001, Name Amy America, Previous Name Amy Canada

Address: Primary Address 4321 Cul de Sac ST, Someplace, MA, 02723; Previous Address 555 Walnut Street, Hammonton, NJ, 08037

Product: 1040, 1099, W2 Only

Years: 2021, 2022, 2023, 2024

Trancript Type: Tax Return Transcript (Box A), Account Transcript (Box B), Record of Account (Box C)

Product	Order Type	Years	Esign	Upload Form*
1040,W2 Only	4506-C (Web)	2021,2022,2023,2024	N/A	N/A

If you select W2 or 1099 and have taxpayer 1 and 2 filled out, then selecting one or both of the following checkboxes is required.

Taxpayer 1 - Include selected W2 and 1099.
 Taxpayer 2 - Include selected W2 and 1099.

Cancel Submit TRV

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 Tax Return Verification

Loan number: 2212000073

TRV[®] 4506-C (Form)
 TRV[®] 4506-C (Web)
 TRV[®] 8821 (Web)
 TRV[®] 8821 (Form)

Tax Payer 1: SSN XXX-XX-0001, Name Andy America, Previous Name Andy Canada

Tax Payer 2: SSN XXX-XX-0001, Name Amy America, Previous Name Amy Canada

Address: Primary Address 4321 Cul de Sac ST, Someplace, MA, 02723; Previous Address 555 Walnut Street, Hammonton, NJ, 08037

Product: 1040, 1099, W2 Only

Years: 2021, 2022, 2023, 2024, 2025, 2026, 2027

Trancript Type: Tax Return Transcript (Box A), Tax Return Transcript (Box B), Account Transcript (Box B), Record of Account (Box C)

Product	Order Type	Years	Esign	Upload Form*
1040	8821 (Form)-TP1	2021,2022,2023,2024	<input checked="" type="checkbox"/>	8821 Form <input type="button" value="Browse"/> Consumer Auth <input type="button" value="Browse"/> Both Combined <input type="button" value="Browse"/>
W2 Only	8821 (Form)-TP1	2021,2022,2023,2024, 2025,2026,2027	<input checked="" type="checkbox"/>	8821 Form <input type="button" value="Browse"/> Consumer Auth <input type="button" value="Browse"/> Both Combined <input type="button" value="Browse"/>
W2 Only	8821 (Form)-TP2	2021,2022,2023,2024, 2025,2026,2027	<input checked="" type="checkbox"/>	8821 Form <input type="button" value="Browse"/> Consumer Auth <input type="button" value="Browse"/> Both Combined <input type="button" value="Browse"/>

If you select W2 or 1099 and have taxpayer 1 and 2 filled out, then selecting one or both of the following checkboxes is required.

Taxpayer 1 - Include selected W2 and 1099.
 Taxpayer 2 - Include selected W2 and 1099.

Cancel Submit TRV

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 Submit (e).

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

The screenshot shows the 'Tax Return Verification' interface. At the top, the loan number is 2212000073. Under 'TRV' options, 'TRV® 8821 (Web)' is selected and highlighted with a red circle 'a'. Below this, taxpayer information for Tax Payer 1 and Tax Payer 2 is displayed, including SSN, Name, and Previous Name. An address section shows Primary Address, Previous Address, and other details. The 'Product' and 'Years' sections are highlighted with a yellow box and labeled 'b'. The 'Product' list includes 1040, 1099, and W2 Only. The 'Years' list includes 2021, 2022, 2023, 2024, 2025, 2026, and 2027. A dropdown menu is open, showing 'Tax Return Transcript (Box A)' selected. Below this, a table shows the selected products and years. The 'Upload Form*' section is highlighted with a yellow box and labeled 'd', showing 'Consumer Auth' and a 'Browse' button. At the bottom, a note states: 'If you select W2 or 1099 and have taxpayer 1 and 2 filled out, then selecting one or both of the following checkboxes is required.' Two checkboxes are checked: 'Taxpayer 1 - Include selected W2 and 1099' and 'Taxpayer 2 - Include selected W2 and 1099', with a red circle 'c' next to the note. The 'Submit TRV' button is highlighted with a red circle 'e'.

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.

SSV

Social Security Verification

Add Borrower	Loan Number	First Name *	Middle Name	Last Name *	SSN *	Date of Birth *
Andy X	2212000073	Andy	NA	America	XXX-XX-0001	12/31/1979

Signature Date *

Signature Type * Wet/ Ink
Electronic

Upload Signed SSA-89 Form
Form SSA-89 must be completely filled out and signed before being submitted.

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

SSV

Social Security Verification

Add Borrower ▾
Amy America, XXX-XX-0001

Loan Number
2212000073

Signature Date *

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)**.

VOE

Verification of Employment

Borrower

Add Borrower

Loan Number	First Name *	Middle Name	Last Name *	SSN *	Date of Birth *
2212000073	Andy	NA	America	XXX-XX-0001	01/01/1980

Andy X

Work History

Self Employed

Position/Title *	Monthly Income	Monthly Income Type *	Employed From *	Employed To *	
Deli Manager	\$1,000.00	Base	01/01/2014	PRESENT	

Employer Name *

Giant Corp.

Current Employer

Employed From *

01/01/2014

Employed To *

PRESENT

Employer Address *	City *	State *	Zip *	Phone *
49201 Long Valley Rd	Alhambra	CA	91801	(856) 765-1234

What type of Verification would you like to order? *

VOE ⓘ
 VOI ⓘ
 VVOE ⓘ

Work History

- Giant Corp., [01/01/2014 To PRESENT]
- Aldi Food Co., [01/25/2017 To 09/09/2017]
- Virtua, [04/05/2018 To 07/04/2019]
- Inspira, [04/09/2005 To 05/31/2008]

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.

Upload Documents

Browse

File Name	Status	Actions
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Enter Note text here...</p> </div>		<div style="display: flex; justify-content: space-between; align-items: center;"> Cancel Submit VOE </div>

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)**.

VOE TSV

Verification of Employment

Borrower

a Add Borrower ▾

Loan Number	First Name *	Middle Name	Last Name *	SSN *	Date of Birth *
2212000073	Andy	NA	America	XXX-XX-0001	01/01/1980

b Work History ▾

Upload Documents Browse

File Name	Status	Actions
Enter Note text here...		

c Cancel Submit VOE

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)**.

Select Documents and Files ×

Document Groups
No document group selected ▾

Browse: **b** LOCAL DRIVE

c Drop files here to upload

d Upload

a Your Form

DOCUMENT FO...	ATTACHED FILES	DESCRIPTION	FOR BORROWE...	DOCUMENT ST...	STATUS DATE	SOURCE	UPLOAD STATUS
<input type="checkbox"/>	Your Form					EFolder	
<input type="checkbox"/>	f22a535e-5c3a-4f					EFolder	

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.

Order Summary
New Order

* Indicates rejection. Review notes and re-order.

Name	ID	Added	TRV Status	VOE Status	SSV Status	Report	Notes
ANDY AMERICA	3853	01/21/25 13:02	Completed				
ANDY AMERICA, AMY AMERICA	3795	01/17/25 09:22	Completed				
ANDY AMERICA, AMY AMERICA	3792	01/17/25 08:49	Completed				
AMY AMERICA	3669	01/06/25 11:55	Completed				
AMY AMERICA	3668	01/06/25 11:48	Completed				

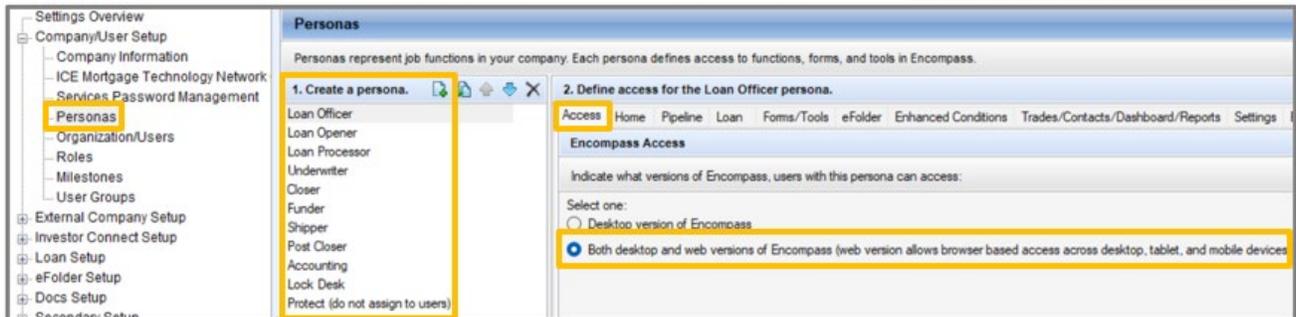
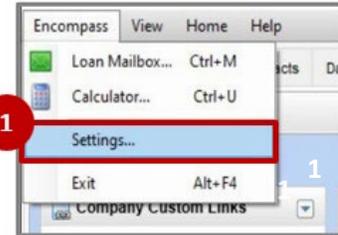
Orders Reports View
✕

Report	Verified	Status	Download Date&Time	Display Report
1040 - 4506-C (Form) - TP1	ANDY AMERICA	Completed	01/22/25 09:13 AM	
1099 - 4506-C (Form) - TP1	ANDY AMERICA	Completed	01/22/25 09:13 AM	

Administrator Instructions

Enabling Encompass Web Access

1. Click on the Encompass tab from the top navigation bar and click 'Settings...'. 1
2. Under Company/User Setup, select Personas. Under each Persona within the Access tab, ensure that "Both desktop and web versions..." is selected.

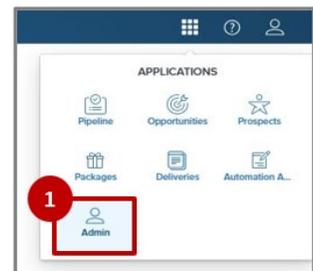


3. To adjust additional company account settings for Encompass Web (EPC), navigate back to Settings Overview and click the [Web Version Settings](#) hyperlink to open the Encompass Web Admin Portal.



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. 1



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



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

A screenshot of a web form. At the top, there is a 'Category' dropdown menu. The dropdown is open, and 'Verifications' is selected. A red box highlights the dropdown menu, labeled '3a'. Below the dropdown, there is a blue button labeled 'Retrieve Products', which is also highlighted with a red box and labeled '3b'.

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

A screenshot of the 'Add Service' page. At the top, there is a search bar containing 'TSV', highlighted with a red box and labeled '4a'. Below the search bar, there are several buttons: 'Sort', 'A-Z', 'Category', and 'Verifications'. In the main content area, there is a card for 'TSV Verifications'. At the bottom of this card, there are three buttons: 'Manual', 'Easy Order', and 'Automated'. The 'Manual' button is highlighted with a red box and labeled '4b'.

- In the top right, toggle Active to ON.

- Under Service Setup Name input TSV.

- OPTIONAL: Set your Readiness Conditions.

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

- Save

A large screenshot of the 'Add Manual Setup' form. The form has a title 'Add Manual Setup' and a toggle for 'Active' set to 'ON', highlighted with a red box and labeled '5'. Below the title, there are three columns: 'Verifications', 'Loan Level', and 'TSV'. The 'Service Setup Name' field contains 'TSV', highlighted with a red box and labeled '6'. The 'Service Setup Description' field is empty. Below this, there is a 'Readiness Conditions' section with a 'Validate' button, highlighted with a red box and labeled '7'. There are two radio buttons: 'Condition Editor' (selected) and 'Query Builder'. Below this is a large empty text area. The 'Authorized Users' section has an 'Add' button highlighted with a red box and labeled '8a'. Below this is a table with columns: ID, NAME, TYPE, and ACTION. The table has one row: 'traininguser', 'Training User (traininguser)', 'User', and a trash icon. A red arrow points from the 'Add' button to the 'User' type in the table. Below the table is an 'Add Entities' dialog box. The dialog box has a 'Category' dropdown set to 'Organizations' and a 'Selected Entities' list. The list is empty, with the text 'No Items Selected' and a red box labeled '8b'. At the bottom of the dialog box, there are 'Cancel' and 'Add' buttons. At the bottom right of the main form, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted with a red box and labeled '9'.

[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.

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