

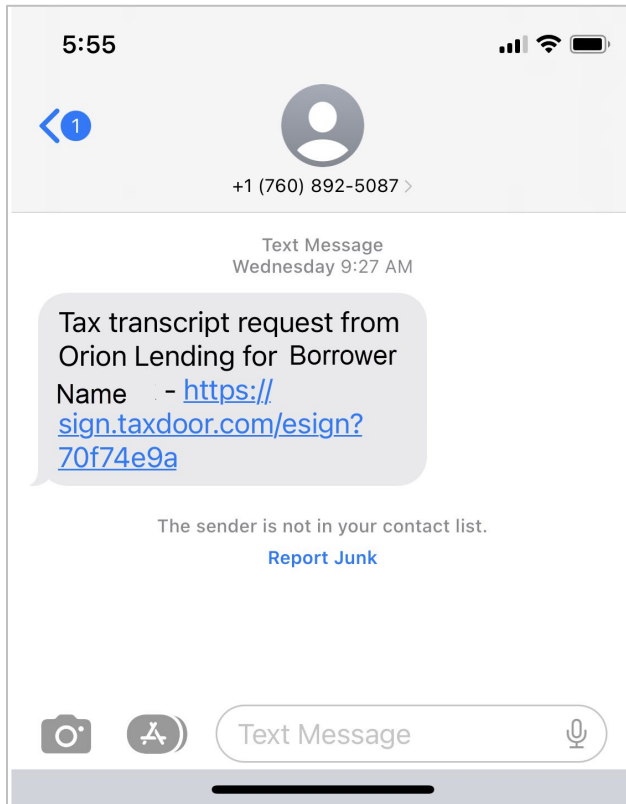
Taxdoor 4506-C for Borrowers

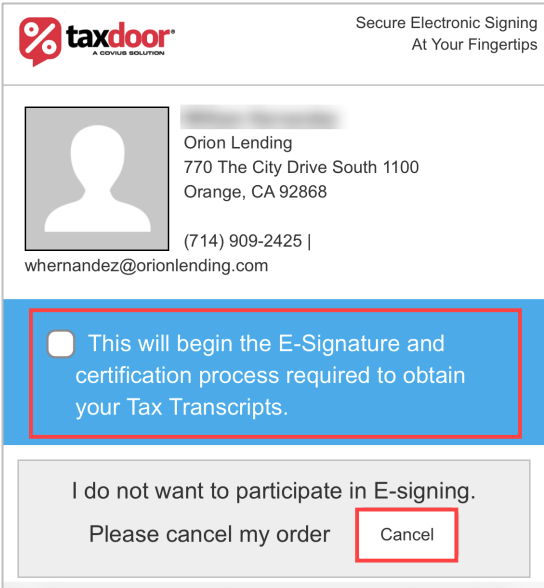
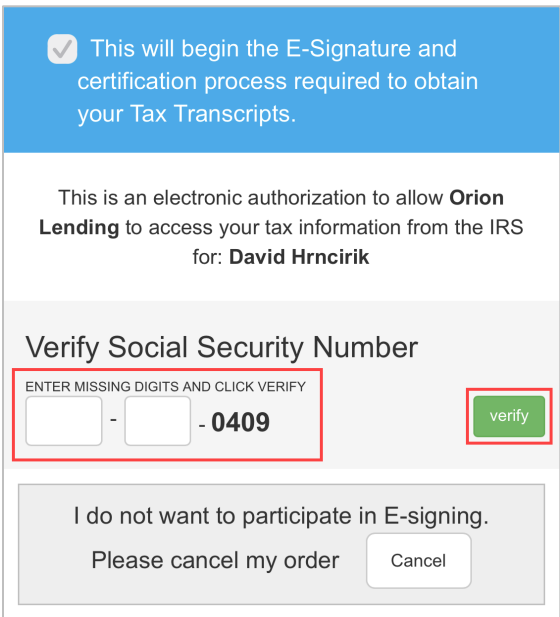
Purpose: Orion Lending requires a copy of the borrower's tax transcript to complete a mortgage application. This guide will provide step-by-step instructions for the borrower to complete the tax transcripts process in Taxdoor successfully.

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

Note: If the Desktop and Mobile versions do not work for the borrower, the borrower can complete the [4506-C Form](#). Once wet signed, the broker can submit the completed *4506-C Form* to their Account Manager.

Mobile Version

Step	Action
1.	Borrowers receive and open the Text Message. Click the link to launch Taxdoor. 

Step	Action
2.	Borrowers check the This will begin the E-Signature and certification process required to obtain your Tax Transcripts box. Note: Selecting Cancel anytime throughout the process will cancel the entire order, and the broker or borrower will need to contact the Orion Representative in the email or Taxdoor screen to issue another request. 
3.	Borrowers enter their Social Security Number, and click the Verify button. 

Step	Action						
4.	Borrowers confirm their Current Address, and click the Verify button to confirm the address is accurate, or the Edit button to make changes. Verify Social Security Number xxx-xx-0409  Verify Current Address 770 The City Drive South Orange, CA 92868 edit verify <table border="1"> <thead> <tr> <th>If</th><th>Then</th></tr> </thead> <tbody> <tr> <td>The address is correct</td><td>Proceed to Step 6</td></tr> <tr> <td>The address is not correct</td><td>Proceed to Step 5</td></tr> </tbody> </table>	If	Then	The address is correct	Proceed to Step 6	The address is not correct	Proceed to Step 5
If	Then						
The address is correct	Proceed to Step 6						
The address is not correct	Proceed to Step 5						
5.	Borrowers enter the correct Current Address, and click the Save and Verify button. Click the Yes button. Enter home address for tax year 2021 ☐ Copy address from current address. 770 The City Drive S 92868 Orange California  Close Save & Verify  Are you sure? Your current address is: 770 The City Drive South Orange, CA 92868 No Yes						



Step	Action						
6.	Borrowers confirm their Tax Return Addresses for each Tax Year. Click the Verify button to confirm the address is accurate, or the Edit button to make changes. Verify Current Address 770 The City Drive South Orange, CA 92868 Verify Tax Return Addresses TAX YEAR 2022 ADDRESS USED ON TAX RETURN 770 The City Drive South Orange, CA 92868 edit verify <table><thead><tr><th>If</th><th>Then</th></tr></thead><tbody><tr><td>The address is correct for each Tax Year</td><td>Proceed to Step 8</td></tr><tr><td>The address is not correct for each Tax Year</td><td>Proceed to Step 7</td></tr></tbody></table>	If	Then	The address is correct for each Tax Year	Proceed to Step 8	The address is not correct for each Tax Year	Proceed to Step 7
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7.	Borrowers confirm the address for that Tax Year is correct. <table><thead><tr><th>If</th><th>Then</th></tr></thead><tbody><tr><td>The address is correct for the Tax Year</td><td> - Click the Save & Verify button - Proceed to Next Step </td></tr><tr><td>The address is not correct for Tax Year.</td><td> - Uncheck the Copy Address from current address and update the Address - Click the Save & Verify button - Proceed to Next Step </td></tr></tbody></table> Example: Address is Correct Enter home address for tax year 2022 ☒ Copy address from current address. 770 The City Drive South Orange, CA 92868 Close Save & Verify Example: Address is Not Correct Enter home address for tax year 2022 ☐ Copy address from current address. 1234 Any Drive 92868OrangeCalifornia Close Save & Verify	If	Then	The address is correct for the Tax Year	- Click the Save & Verify button - Proceed to Next Step	The address is not correct for Tax Year.	- Uncheck the Copy Address from current address and update the Address - Click the Save & Verify button - Proceed to Next Step
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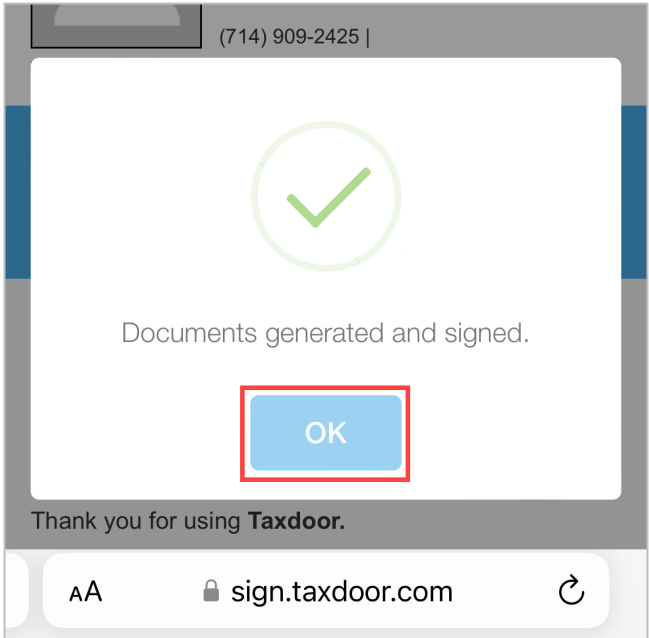
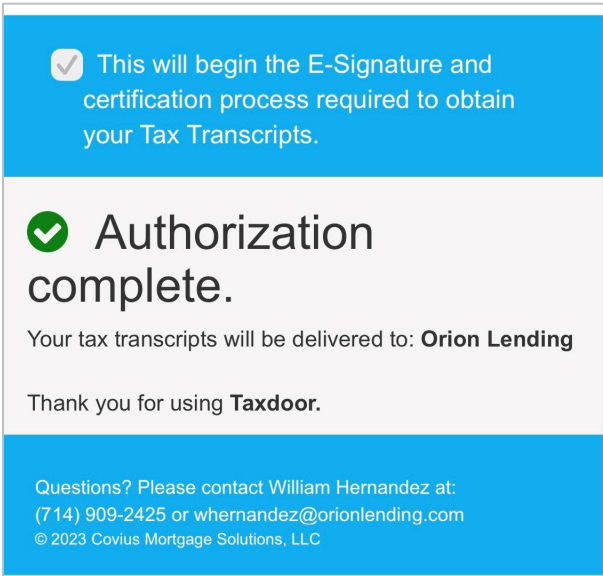


Step	Action
8.	Once all addresses are confirmed, borrowers check the I agree to use Electronic Records & Signatures box. Verify Tax Return Addresses TAX YEAR 2021 ADDRESS USED ON TAX RETURN 770 The City Drive S Orange, CA 92868  ☐ I agree to use Electronic Records & Signatures I do not want to participate in E-signing. Please cancel my order Cancel



Step	Action
9.	Borrowers scroll through the entire agreement, and add their e-signature by clicking the I authorize Orion Lending to order 4506-C and sign now button. Note: Selecting Cancel anytime throughout the process will cancel the entire order, and the broker or borrower will need to contact the Orion Representative in the email or Taxdoor screen to issue another request. Please read the terms of service below and click the Agree checkbox above to continue. If you wish to not participate in Electronic signing of your documents please click the Cancel Order button below. IMPORTANT: Please scroll through and read the ENTIRE agreement in order to Authorize your E-Signature. 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. Contact Information (714) 909-2425 Orion Lending 770 The City Drive South 1100 Orange, CA 92868 Provide Authorization I declare that I am either the taxpayer whose name is , 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 sign.taxdoor.com I authorize Orion Lending to order 4506-C and sign now Cancel



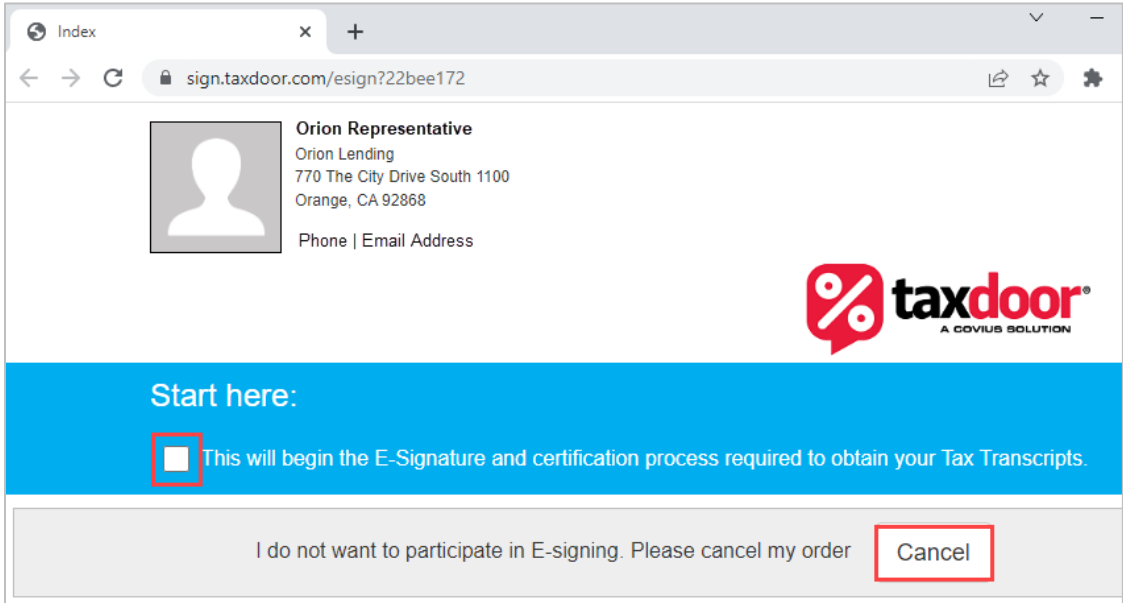
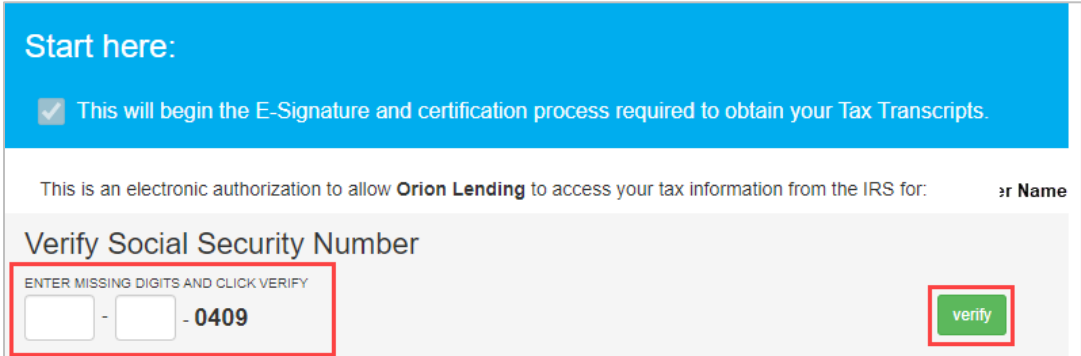
Step	Action
11.	Borrowers click the OK button to confirm the documents have been generated and signed. 
12.	The <i>Authorization Complete</i> screen populates. 
Congratulations! The Tax Transcripts have been authorized to be ordered by Orion Lending!	



Desktop Version

Step	Action
1.	Borrowers open the email from Orion Lending <notice@taxdoor.com> E-Signature Request (Borrower-pending E-signature), and click the Link provided. [EXTERNAL EMAIL- Caution] RE: E-Signature Request (Borrower-pending E-signature) OL Orion Lending <notice@taxdoor.com> To Borrower Name This message was sent with High importance.  taxdoor A CREDIT SOLUTION CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe. Orion Lending requires a copy of your tax transcripts to complete your mortgage application. Authorization needed for: Borrower Name Please complete your online authorization by clicking here: https://sign.taxdoor.com/esign?221 If you have any questions, please contact me. Orion Representative Orion Lending 770 The City Drive South 1100 Orange, CA 92868 Phone Email Address Note: Borrowers have the option to complete the request on their cell phone if Taxdoor is initiated from the email on the mobile device.

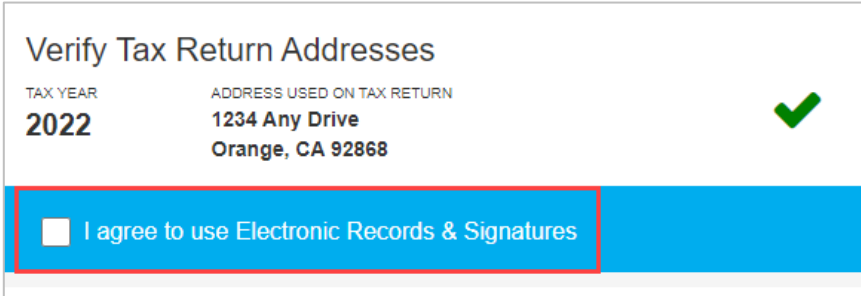
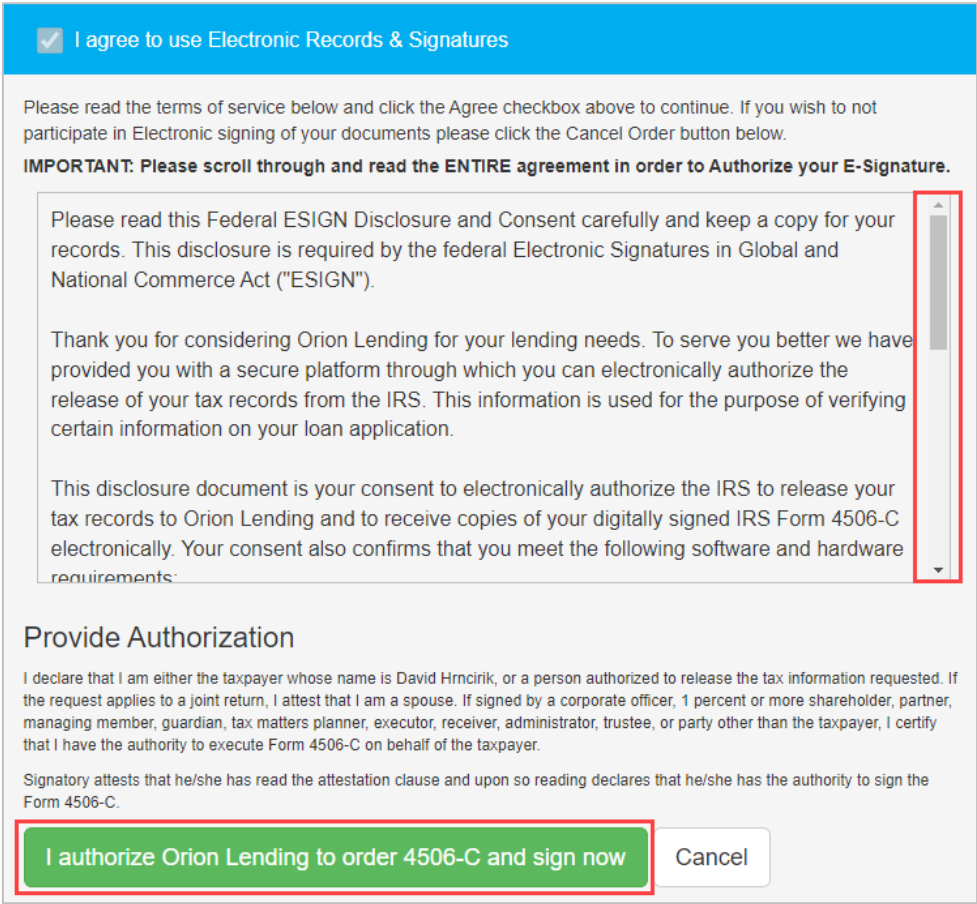


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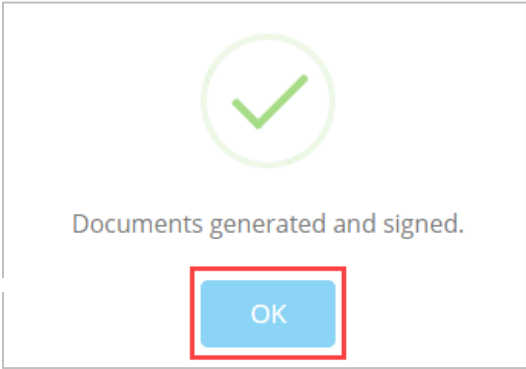
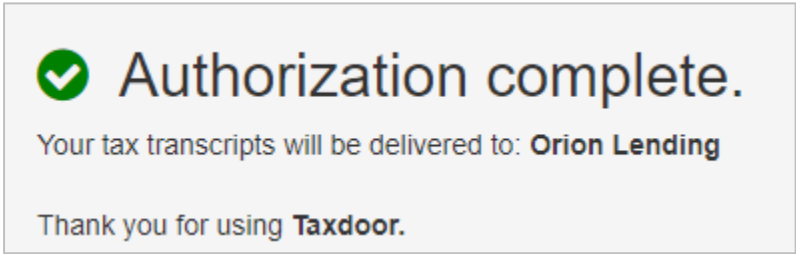
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