

veri-taxTM Web Services

Version 3.2.4



The **Veri-Tax Integration Guide** is for the technical resources assigned by Clients integrating with the Veri-Tax Web service in order to create and receive products. This guide identifies the data requirements and file formats exchanged between the Web Service interface and the Client. This guide assumes the technical resource has proficient knowledge in XML and the SOAP 1.1 protocol.

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1. Introduction

The **Veri-Tax Integration Guide** is for the technical resources assigned by Clients integrating with the Veri-Tax Web service in order to create and receive products. This guide identifies the data requirements and file formats exchanged between the Web Service interface and the Client. This guide assumes the technical resource has proficient knowledge in XML and the SOAP 1.1 protocol.

1.1 General Technical Prerequisites

The following technical prerequisites must be satisfied by the Requesting Party to use the Veri-Tax Web Service.

- Establishment of an integrated development environment that supports the SOAP 1.1 protocol
- Knowledge of the W3C XML 1.0 specification
- Knowledge of the standard HTTP Communication Protocol
- Knowledge of the Web Services Description Language (WSDL)
- Experience in implementing applications that consume webservices described by a public WSDL

1.2 Network Layer Considerations

1.2.1 IP Addresses for whitelisting

If your company uses a firewall for security, you will need to add our IP address ranges to your list of allowable IP addresses in order to communicate with our web services. We give our best effort to plan ahead and allocated IP ranges for the future, however, it is possible that we will need to add IP ranges as we expand and upgrade our infrastructure.

IP Address	
207.38.26.184	205.197.240.97
207.38.26.233	205.197.240.98
207.38.26.241	205.197.240.115
207.38.115.20	205.197.240.120
67.106.215.30	206.82.203.86

1.2.2 Ports

The Veri-Tax system uses port 443 for HTTPS

1.2.3 Transport Security

The Veri-Tax system accepts communication over the Hypertext Transfer Protocol Secure (HTTPS) protocol. The Veri-Tax system will supply the transport encryption, if your application handles SSL



handshakes and the protocol implementation, you will be able to establish a secure connection to our system.

1.3 Understanding the SOAP protocol

The Veri-Tax System uses the Simple Object Access Protocol (SOAP) with support for both version 1.1 and 1.2. The SOAP protocol is a specification for exchanging structured information over networks. Many integrated development environments such as Microsoft Visual Studio .NET include development tool kits to help translate SOAP messages making using and consuming these very easy.

For more information on the SOAP protocol, please visit <http://www.w3.org/TR/soap/>.

1.4 Password Expiration Policy

In order to help maintain security across the Veri-Tax network, all user passwords are expired every 90-days. Veri-tax will maintain necessary password/authentication controls to protect access to its data and applications.

1.4.1 Password Change Instructions

To change your user password, visit the Veri-Tax web portal located at <https://www2.taxverification.com> and login using your webservice credentials.

- If your password has already expired, you will be prompted to change your password upon login.
- If your password has not expired and you wish to change it before it expires, navigate to the "My Profile" tab, you will have an option to change your password on this page.

1.4.2 Requesting a Password Reset – Security Questions

In order to protect your account from malicious users, we have implemented a policy to verify users attempting to reset their password in the form of 6 user defined security questions. In order to keep your account secure, we recommend visiting the Veri-Tax webportal at <https://www2.taxverification.com>. Login using your webservice username and password, navigate to the My Profile section to set your security questions. For more information regarding this policy, please contact your Account Manager. If you feel that your account has been compromised, please contact your Account Manager or the customer happiness team immediately.

1.4.3 Password Best Practices

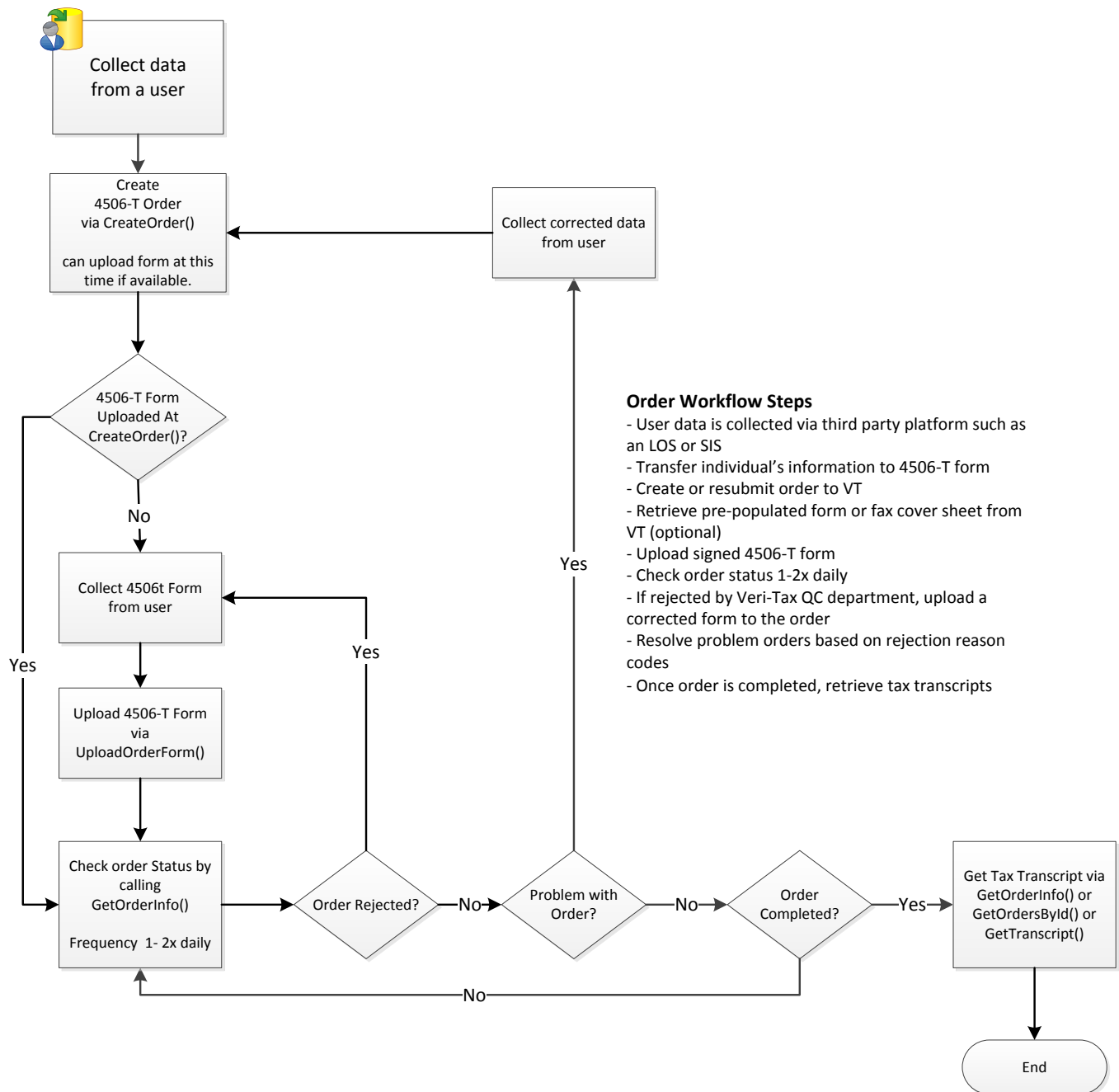
- Blank or zero-length passwords are prohibited.
- Dictionary based passwords are discouraged as industry standard password cracking tools are used as part of all security audits to identify weak passwords.
- New passwords should not match any of the previous 3 passwords used.
- Passwords must be changed every 90 days.
- Passwords must be at least 8 characters in length.
- Passwords should not contain any part of the user or account name.
- Passwords must contain characters from at least three (3) of the following four (4) classes:

Description	Example
English upper case letters	A, B, C, ... Z
English lower case letters	a, b, c, z
Westernized Arabic numerals	0, 1, 2, 9
Non-alphanumeric	!@#...-+=\$

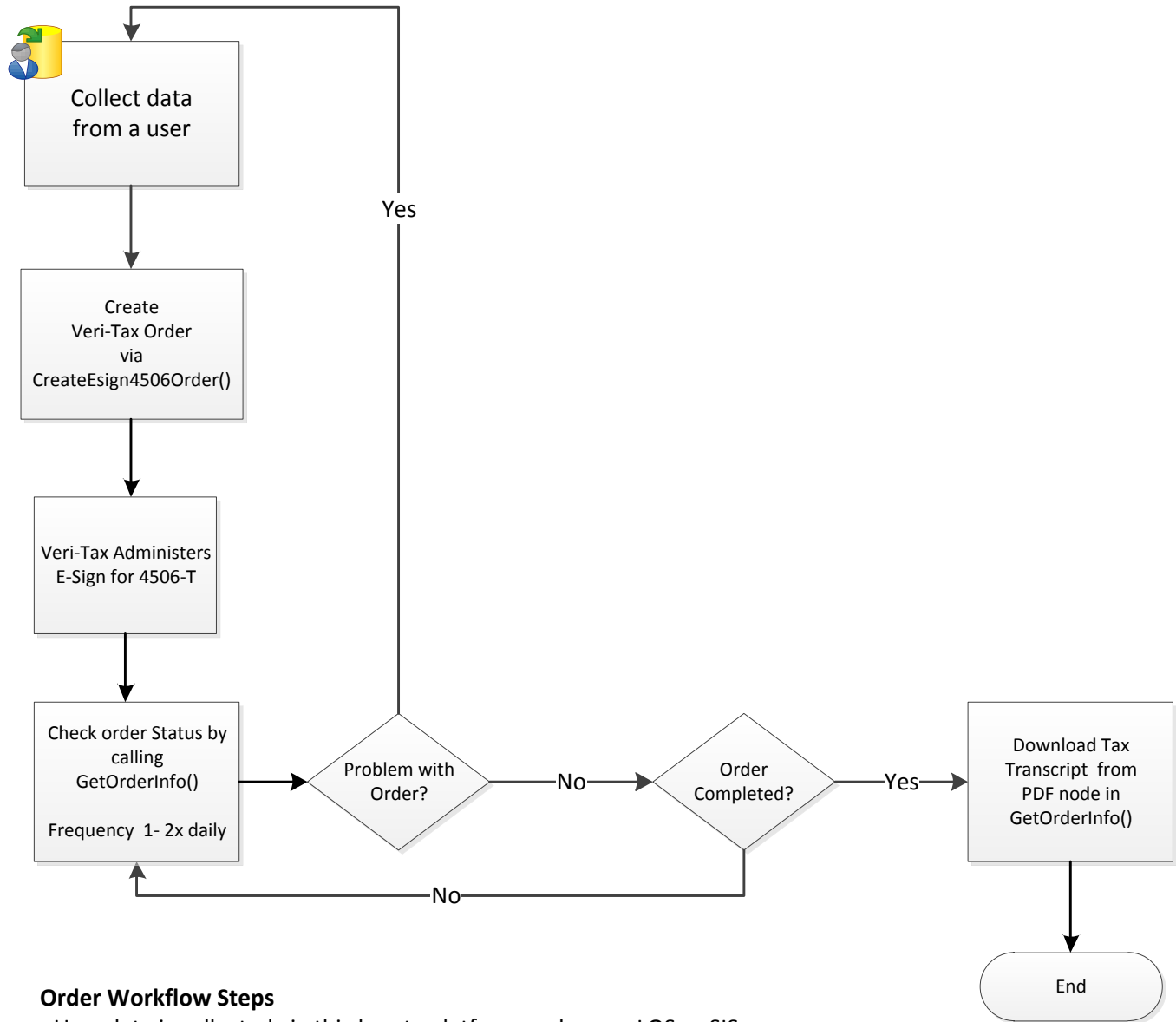
1.5 Common Order Workflows

In this section, we have provided some common workflows that other integration partners have implemented. These are common uses but you may use any combination of API calls as you see fit in your implementation.

1.5.1 4506-T Order workflow



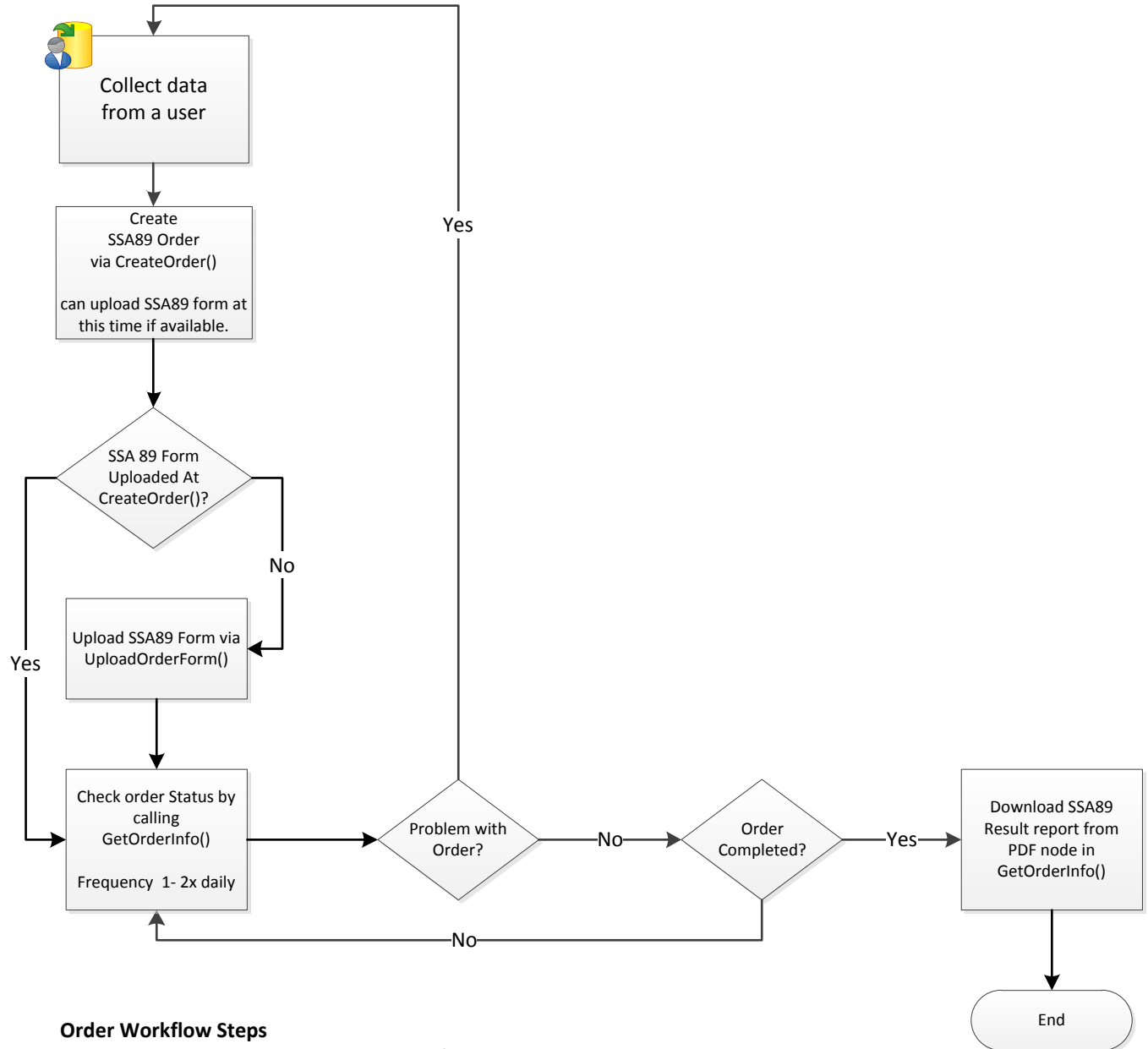
1.5.2 4506-T E-Signature Order Using Veri-Tax Provided Solution



Order Workflow Steps

- User data is collected via third party platform such as an LOS or SIS
- Create order request using `CreateEsign4506Order()`
- VT administers E-sign for 4506-T and e-signed form is automatically sent to VT
- Check the order status by polling the `GetOrderInfo()` API call 1-2x daily.
- Once order is completed, retrieve tax transcripts from PDF node.

1.5.3 SSA 89 Order Workflow



Order Workflow Steps

- User data is collected via third party platform such as an LOS or SIS
- Create order request using CreateOrder()
- Correct any mistakes in SSA89 form if rejected
- Check the order status by polling the GetOrderInfo() API call.
- Once order is completed, retrieve SSA89 Report from PDF node.



2. Service Description, Endpoints and Environment Information

2.1 WSDL

<https://secure.veri-tax.com/vt.service/PublicAPI/vtservice.asmx?WSDL>

2.2 Endpoints

Each environment below requires a valid Username and Password to access and use the API methods. Credentials for each environment will be provided by Veri-Tax.

Environment	Endpoint URL
Test	https://wstest.veri-tax.com/vt.service/PublicAPI/vtservice.asmx
Certification	https://cert.secure.veri-tax.com/vt.service/PublicAPI/vtservice.asmx
Production	https://secure.veri-tax.com/vt.service/PublicAPI/vtservice.asmx

2.3 Environment Descriptions

Environment	Description
Test	This environment will have the latest version available for use. However, please be aware that we release builds into this environment twice daily which can result in intermittent availability.
Certification	This environment contains a copy of the build available in our production environment and is the most stable build available.
Production	We recommend coding against the Certification environment prior to making the move to the production environment.

3. CreateOrder

This method is used to create and submit an order. For IRS Tax Transcript requests, the user can upload a signed 4506-T form. For SSA89 processing, a user can upload a signed SSA89 form.

NOTE: The following changes have been made to the following fields to conform to the new SSA requirements as well as new IRS requirements for business tax return requests..

Field	Action	Comment
gender	Deprecated	Removed as of the May release. Please update your integrations.
minor	added	This is a new SSA-89 required field by the SSA to indicate a search on a Minor. Required as of the May release.
fiscalEndDateMonth	added	This adds support for fiscal year end dates when requesting tax transcripts for businesses.
ccEmailList	added	Allows the user to provide a list of email addresses that will receive a copy of order status notifications.

3.1 Request

XML Tag Name	Description	Format	Required
CreateOrder	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
type	Valid Values: - F1040 - F1040PlusWages - W2 - TFV - F1065 - F1120 - F1120S - SSA89 - SSNMatch - SSNDeluxe - SSNComplete	string	Y
TranscriptType	Valid Values: - A - B - C Note: Required only if type=F1040,F1065, F1120, or F1120S	string	Y
loanNumber	Loan Number NOTE: As of version 3.0.8, a company can request to have this field required. Please check with your account manager to confirm if this option was enabled for your company	string	N
SSN	Social Security Number	string	Y
firstName	First Name	string	Y
middleInitial	Middle Initial	string	N
lastName	Last Name	string	Y
address	Address	string	N
city	City	string	N
state	State	string	N
zipCode	Zipcode	integer	N
previousAddress	Previous address	string	N
PreviousCity	Previous city	string	N
PreviousState	Previous state	string	N
PreviousZip	Previous zip code	string	N
DOB	Date of Birth Note: Required only if type = SSA89 or SSNComplete	string	Y
gender	Valid Values: - M - F	string	N
years	Group	N/A	Y
int	Year Value (repeating)	integer	Y
orderNote	Notes	string	N
uploadedForm	Order Form (Signed 4506-T)	Base64Binary	N

	For SSA89 orders, a signed SSA89		
title	Title of the applicant for verification of employment orders	String	N
minor	Required only if placing an order for an SSA89 or SSNComplete product.	Boolean	N
fiscalEndDateMonth	If requesting a business return for a business where the fiscal year ends on a month other than December, you can specify that here.	string	N
ccEmailList	Allows the user to provide a list of email addresses that will receive a copy of order status notifications. To enter multiple addresses, separate the emails by a semi-colon	string	N



Example Requests:

Request for a W2

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <CreateOrder xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <type>W2</type>
      <loanNumber>ReferenceNumber</loanNumber>
      <SSN>000000000</SSN>
      <firstName>WebServiceTest</firstName>
      <lastName>WebServiceTest</lastName>
      <address>123 Street</address>
      <city>city</city>
      <state>CA</state>
      <zipCode>92782</zipCode>
      <years>
        <int>2011</int>
        <int>2010</int>
      </years>
      <orderNote>Order Notes</orderNote>
    </CreateOrder>
  </soap:Body>
</soap:Envelope>
```

Request for an SSA89

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <CreateOrder xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <type>SSA89</type>
      <loanNumber>ReferenceNumber</loanNumber>
      <SSN>000000000</SSN>
      <firstName>WebServiceTest</firstName>
      <middleInitial>WebServiceTest</ middleInitial >
      <lastName>WebServiceTest</lastName>
      <DOB>01/01/2012</DOB>
      <gender>M</gender>
    </CreateOrder>
  </soap:Body>
</soap:Envelope>
```

Request for an SSNMatch

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <CreateOrder xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <type>SSNMatch</type>
      <SSN>000000000</SSN>
      <firstName>WebServiceTest</firstName>
      <middleInitial>W</ middleInitial >
      <lastname>WebServiceTest</lastname>
    </CreateOrder>
  </soap:Body>
</soap:Envelope>
```

Request for an SSNDeluxe

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <CreateOrder xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <type>SSNDeluxe</type>
      <SSN>000000000</SSN>
    </CreateOrder>
  </soap:Body>
</soap:Envelope>
```

3.2 Response

XML Tag Name	Description	Format
CreateOderResponse	Group	N/A
CreateOrderResult	Group	N/A
ifSucceed	Success flag. Note: this returns for type = SSA89	boolean
errorCode	Error Code	string
errorMessage	Error Message	string
orderId	Order ID	integer

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <CreateOrderResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <CreateOrderResult>
        <ifSucceed>
          True</ ifSucceed >
          <errorCode>Success</errorCode>
          <orderId>1234567</orderId>
        </CreateOrderResult>
      </CreateOrderResponse>
    </soap:Body>
  </soap:Envelope>
```

Example Response (Failure #1):

Refer to Section "Error Code Definitions" for error codes and descriptions

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <CreateOrderResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <CreateOrderResult>
        <ifSucceed>false</ ifSucceed >
        <errorCode>AuthenticationFailure</errorCode>
        <errorMessage>Unauthorized access to web service</errorMessage>
        <orderId>0</orderId>
      </CreateOrderResult>
    </CreateOrderResponse>
  </soap:Body>
</soap:Envelope>
```



Example Response (Failure #2):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <CreateOrderResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <CreateOrderResult>
        <ifSucceed>false</ ifSucceed >
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
        <orderId>0</orderId>
      </CreateOrderResult>
    </CreateOrderResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure #3):

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <CreateOrderResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <CreateOrderResult>
        <ifSucceed>
          false</ ifSucceed >
          <errorCode>InternalError</errorCode>
          <errorMessage>Internal error: Unable to determine file type.</errorMessage>
          <orderId>0</orderId>
        </CreateOrderResult>
      </CreateOrderResponse>
    </soap:Body>
  </soap:Envelope>
```

4. GetCoverSheet

This method is used to retrieve a pre-filled fax cover sheet for IRS Tax Transcript requests. This coversheet can be used if the user chooses to fax a signed 4506-T form to Veri-Tax.

4.1 Request

XML Tag Name	Description	Format	Required
GetCoverSheet	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Order ID	integer	Y
type	The order type Valid Values: - F1040 - F1040PlusWages - W2 - TFV - F1065 - F1120 - F1120S	string	Y

Example Request:

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetCoverSheet xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>UserName</login>
      <password>Password</password>
      <orderId>1860804</orderId>
      <type>F1040</type>
    </GetCoverSheet>
  </soap:Body>
</soap:Envelope>
```

4.2 Response

XML Tag Name	Description	Format
GetCoverSheetResponse	Group	N/A
GetCoverSheetResult	Group	N/A
errorCode	Error Code	string
errorMessage	Error Message	string
mimeType	FileType (see section “Supported MimeTypes”)	string
documentBytes	Cover Sheet File	Base64Binary

Example Response (Success):

```
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetCoverSheetResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetCoverSheetResult>
        <errorCode>Success</errorCode>
        <mimeType>application/pdf</mimeType>
        <documentBytes>[ExampleReturn]</documentBytes>
      </GetCoverSheetResult>
    </GetCoverSheetResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetCoverSheetResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetCoverSheetResult>
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
      </GetCoverSheetResult>
    </GetCoverSheetResponse>
  </soap:Body>
</soap:Envelope>
```

5. GetOrderForm

This method is used to retrieve a pre-filled 4506-T form for IRS Tax Return Transcript requests.

5.1 Request

XML Tag Name	Description	Format	Required
GetOrderForm	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderID	Order ID	integer	Y
type	The order type Valid Values: • F1040 • F1040PlusWages • W2 • TFV • F1065 • F1120 • F1120S	string	Y

Example Request:

```
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetOrderForm xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <type>F1040</type>
      <orderId>1860804</orderId>
      <type>F1040</type>
    </GetOrderForm>
  </soap:Body>
</soap:Envelope>
```

5.2 Response

XML Tag Name	Description	Format
GetOrderFormResponse	Group	N/A
GetOrderFormResult	Group	N/A
errorCode	Error Code	string
errorMessage	Error Message	string
mimeType	FileType (see section, “Supported MimeTypes”)	string
documentBytes	Cover Sheet File	Base64Binary

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrderFormResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrderFormResult>
        <errorCode>Success</errorCode>
        <mimeType>application/pdf</mimeType>
        <documentBytes>[ExampleReturn]</documentBytes>
      </GetOrderFormResult>
    </GetOrderFormResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrderFormResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrderFormResult>
        <errorCode>InternalServerError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
      </GetOrderFormResult>
    </GetOrderFormResponse>
  </soap:Body>
</soap:Envelope>
```

6. GetOrderInfo

This method is used to retrieve order information.

6.1 Request

XML Tag Name	Description	Format	Required
GetOrderInfo	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderID	Order ID	integer	Y
type	Valid Values: - F1040 - W2 - TFV - F1065 - F1120 - F1120S - SSA89 - SSNMatch - SSNDeluxe - SSNComplete	string	Y

Example Request:

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetOrderInfo xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <orderId>1860804</orderId>
      <type>F1040</type>
    </GetOrderInfo>
  </soap:Body>
</soap:Envelope>
```

6.2 Response

XML Tag Name	Description	Format
GetOrderInfoResponse	Group	N/A
GetOrderInfoResult	Group	N/A
errorCode	Error Code	string
orderDetail	Group	N/A
orderId	Order ID Input	integer
firstName	First Name	string
lastName	Last Name	string
DOB	Date of Birth	string
Gender	Gender	string
ResponseCode	For SSA89 Orders, the server response code.	string
PDF	base64Binary	base64Binary
orderDate	Order Date Timestamp	DateTime
loanNumber	Reference Number	string
Type	Type	string
SSN	Social Security Number	integer
status	Order Status. Note: Please see section “Order Status Code Definitions” for valid order statuses.	string
orderCompletedDate	Order Completed Date	DateTime
ProblemDescription	Problem Description	string
Name	Last Name, First Name	string
Address	Address	string
City	City	string
State	State	string
ZipCode	Zip	integer
Years	Group	N/A
int	Year Value (repeating)	integer
History	Group	N/A
OrderHistoryItem	Group (repeating)	N/A
Date	Activity Date	DateTime
Message	Activity Description	string
MessageType	Activity User – Valid Values CustomerService Client System Problem Internal Wholesale	string

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrderInfoResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrderInfoResult>
        <errorCode>Success</errorCode>
        <orderDetail>
          <orderId>1860804</orderId>
          <orderDate>2012-10-02T13:27:31.127</orderDate>
          <loanNumber>ReferenceNumber</loanNumber>
          <type>W2</type>
          <SSN>1234</SSN>
          <status>NotReceived</status>
          <orderCompletedDate xsi:nil="true" />
          <ProblemDescription/>
          <Name>WebServiceTest, WebServiceTest</Name>
          <Address>123 Street</Address>
          <City>city</City>
          <State>CA</State>
          <ZipCode>92782</ZipCode>
          <Years>
            <int>2011</int>
            <int>2010</int>
          </Years>
          <History>
            <OrderHistoryItem>
              <Date>2012-10-02T13:27:31.233</Date>
              <Message>Order Notes</Message>
              <MessageType>Client</MessageType>
            </OrderHistoryItem>
            <OrderHistoryItem>
              <Date>2012-10-02T13:27:31.24</Date>
              <Message>Order created</Message>
              <MessageType>System</MessageType>
            </OrderHistoryItem>
          </History>
        </orderDetail>
      </GetOrderInfoResult>
    </GetOrderInfoResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrderInfoResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrderInfoResult>
        <errorCode>InternalServerError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
      </GetOrderInfoResult>
    </GetOrderInfoResponse>
  </soap:Body>
</soap:Envelope>
```

7. GetOrdersByChangedDate

This method is used to retrieve 4506-T orders by changed date.

7.1 Request

XML Tag Name	Description	Format	Required
GetOrdersByChangedDate	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
startDate	Start Date	DateTime	Y
endDate	End Date	DateTime	Y
type	Valid Values: • F1040 • F1040PlusWages • W2 • TFV • F1065 • F1120 • F1120S	string	Y

Example Request:

```
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetOrdersByChangedDate xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <startDate>2012-10-02T13:27:30.126</startDate>
      <endDate>2012-10-02T13:27:32.128</endDate>
      <type>F1040</type>
    </GetOrdersByChangedDate>
  </soap:Body>
</soap:Envelope>
```

7.2 Response

XML Tag Name	Description	Format
GetOrderInfoResponse	Group	N/A
GetOrderInfoResult	Group	N/A
errorCode	Error Code	string
orderDetail	Group	N/A
orderId	Order ID Input	Integer
firstName	First Name	string
lastName	Last Name	string
DOB	Date of Birth	string
Gender	Gender	string
ResponseCode	For SSA89 Orders, the server response code.	string
PDF	Not used.	N/A
orderDate	Order Date Timestamp	DateTime
loanNumber	Reference Number	string
Type	Type	string
SSN	Social Security Number	integer
status	Order Status. Note: Please see section “Order status definitions”.	string
orderCompletedDate	Order Completed Date	DateTime
ProblemDescription	Problem Description	string
Name	Last Name, First Name	string
Address	Address	string
City	City	string
State	State	string
ZipCode	Zip	integer
Years	Group	N/A
int	Year Value (repeating)	integer
History	Group	N/A
OrderHistoryItem	Group (repeating)	N/A
Date	Activity Date	DateTime
Message	Activity Description	string
MessageType	Activity User – Valid Values CustomerService Client System Problem Internal Wholesale	string

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByChangedDateResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrdersByChangedDateResult>
        <errorCode>Success</errorCode>
        <orders>
          <orderDetail>
            <firstName>
              first</ firstName >
            <lastName>last</lastName>
            <DOB></DOB >
            <ResonseCode></ResonseCode>
            <PDF></PDF>
            <orderId>1860804</orderId>
            <orderDate>2012-10-02T13:27:31.127</orderDate>
            <loanNumber>ReferenceNumber</loanNumber>
            <type>W2</type>
            <SSN>1234</SSN>
            <status>NotReceived</status>
            <orderCompletedDate xsi:nil="true" />
            <ProblemDescription/>
            <Name>WebServiceTest, WebServiceTest</Name>
            <Address>123 Street</Address>
            <City>city</City>
            <State>CA</State>
            <ZipCode>92782</ZipCode>
            <Years>
              <int>2011</int>
              <int>2010</int>
            </Years>
            <History>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.233</Date>
                <Message>Order Notes</Message>
                <MessageType>Client</MessageType>
              </OrderHistoryItem>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.24</Date>
                <Message>Order created</Message>
                <MessageType>System</MessageType>
              </OrderHistoryItem>
            </History>
          </orderDetail>
        </orders>
      </GetOrdersByChangedDateResult>
    </GetOrdersByChangedDateResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByChangedDateResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrdersByChangedDateResult>
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
      </GetOrdersByChangedDateResult>
    </GetOrdersByChangedDateResponse>
  </soap:Body>
</soap:Envelope>
```

8. GetOrdersByCompletedDate

This method is used to retrieve 4506-T or SSA-89 orders by completed date.

8.1 Request

XML Tag Name	Description	Format	Required
getOrdersByCompletedDate	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
startDate	Start Date	DateTime	Y
endDate	End Date	DateTime	Y
type	Valid Values: - F1040 - F1040PlusWages - W2 - TFV - F1065 - F1120 - F1120S - SSA89	string	Y

Example Request:

```
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetOrdersByCompletedDate xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <startDate>2012-10-02T13:27:30.126</startDate>
      <endDate>2012-10-02T13:27:32.128</endDate>
      <type>F1040</type>
    </GetOrdersByCompletedDate>
  </soap:Body>
</soap:Envelope>
```

8.2 Response

XML Tag Name	Description	Format
GetOrderInfoResponse	Group	N/A
GetOrderInfoResult	Group	N/A
errorCode	Error Code	string
orderDetail	Group	N/A
orderID	Order ID Input	integer
FirstName	First Name	string
LastName	Last Name	string
DOB	Date of Birth	string
Gender	Gender	string
ResponseCode	For SSA89 Orders, the server response code.	string
PDF	Not used.	N/A
orderDate	Order Date Timestamp	DateTime
loanNumber	Reference Number	string
Type	Type	string
SSN	Social Security Number	integer
status	Order Status. Note: Please see section “Order status definitions” for valid order statuses.	string
orderCompletedDate	Order Completed Date	DateTime
ProblemDescription	Problem Description	string
Name	Last Name, First Name	string
Address	Address	string
City	City	string
State	State	string
ZipCode	Zip	integer
Years	Group	N/A
int	Year Value (repeating)	integer
History	Group	N/A
OrderHistoryItem	Group (repeating)	N/A
Date	Activity Date	DateTime
Message	Activity Description	string
MessageType	Activity User – Valid Values CustomerService Client System Problem Internal Wholesale	string

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByCompletedDateResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtService.asmx" >
      <GetOrdersByCompletedDateResult>
        <errorCode>Success</errorCode>
        <orders>
          <orderDetail>
            <firstName>first</firstName>
            <lastName>last</lastName>
            <DOB></DOB >
            <ResonseCode></ResonseCode>
            <PDF></PDF>
            <orderId>1860804</orderId>
            <orderDate>2012-10-02T13:27:31.127</orderDate>
            <loanNumber>ReferenceNumber</loanNumber>
            <type>W2</type>
            <SSN>1234</SSN>
            <status>NotReceived</status>
            <orderCompletedDate xsi:nil="true" />
            <ProblemDescription/>
            <Name>WebServiceTest, WebServiceTest</Name>
            <Address>123 Street</Address>
            <City>city</City>
            <State>CA</State>
            <ZipCode>92782</ZipCode>
            <Years>
              <int>2011</int>
              <int>2010</int>
            </Years>
            <History>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.233</Date>
                <Message>Order Notes</Message>
                <MessageType>Client</MessageType>
              </OrderHistoryItem>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.24</Date>
                <Message>Order created</Message>
                <MessageType>System</MessageType>
              </OrderHistoryItem>
            </History>
          </orderDetail>
        </orders>
      </GetOrdersByCompletedDateResult>
    </GetOrdersByCompletedDateResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByCompletedDateResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrdersByCompletedDateResult>
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
      </GetOrdersByCompletedDateResult>
    </GetOrdersByCompletedDateResponse>
  </soap:Body>
</soap:Envelope>
```

9. GetOrdersByEnteredDate

This method is used to retrieve 4506-T or SSN orders by entered date.

9.1 Request

XML Tag Name	Description	Format	Required
GetOrdersByEnteredDate	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
startDate	Start Date	DateTime	Y
endDate	End Date	DateTime	Y
type	Valid Values: • F1040 • F1040PlusWages • W2 • TFV • F1065 • F1120 • F1120S • SSA89 • SSNMatch • SSNDeluxe • SSNComplete	string	Y

Example Request:

```
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetOrdersByEnteredDate xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <startDate>2012-10-02T13:27:30.126</startDate>
      <endDate>2012-10-02T13:27:32.128</endDate>
      <type>F1040</type>
    </GetOrdersByEnteredDate>
  </soap:Body>
</soap:Envelope>
```

9.2 Response

XML Tag Name	Description	Format
GetOrderInfoResponse	Group	N/A
GetOrderInfoResult	Group	N/A
errorCode	Error Code	string
orderDetail	Group	N/A
orderID	Order ID Input	integer
FirstName	First Name	string
LastName	Last Name	string
DOB	Date of Birth	string
Gender	Gender	string
ResponseCode	For SSA89 Orders, the server response code.	string
PDF	Not used for 4506-T orders	base64Binary
orderDate	Order Date Timestamp	DateTime
loanNumber	Reference Number	string
Type	Type	string
SSN	Social Security Number	integer
status	Order Status. Note: Please see section “Order status definitions” for valid order statuses.	string
orderCompletedDate	Order Completed Date	DateTime
ProblemDescription	Problem Description	string
Name	Last Name, First Name	string
Address	Address	string
City	City	string
State	State	string
ZipCode	Zip	integer
Years	Group	N/A
int	Year Value (repeating)	integer
History	Group	N/A
OrderHistoryItem	Group (repeating)	N/A
Date	Activity Date	DateTime
Message	Activity Description	string
MessageType	Activity User – Valid Values CustomerService Client System Problem Internal Wholesale	string

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByEnteredDateResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtbservice.asmx" >
      <GetOrdersByEnteredDateResult>
        <errorCode>Success</errorCode>
        <orders>
          <orderDetail>
            <firstName> first</firstName>
            <lastName>last</lastName>
            <DOB></DOB >
            <ResonseCode></ResonseCode>
            <PDF></PDF>
            <orderId>1860804</orderId>
            <orderDate>2012-10-02T13:27:31.127</orderDate>
            <loanNumber>ReferenceNumber</loanNumber>
            <type>W2</type>
            <SSN>1234</SSN>
            <status>NotReceived</status>
            <orderCompletedDate xsi:nil="true" />
            <ProblemDescription/>
            <Name>WebServiceTest, WebServiceTest</Name>
            <Address>123 Street</Address>
            <City>city</City>
            <State>CA</State>
            <ZipCode>92782</ZipCode>
            <Years>
              <int>2011</int>
              <int>2010</int>
            </Years>
            <History>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.233</Date>
                <Message>Order Notes</Message>
                <MessageType>Client</MessageType>
              </OrderHistoryItem>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.24</Date>
                <Message>Order created</Message>
                <MessageType>System</MessageType>
              </OrderHistoryItem>
            </History>
          </orderDetail>
        </orders>
      </GetOrdersByEnteredDateResult>
    </GetOrdersByEnteredDateResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByEnteredDateResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrdersByEnteredDateResult>
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
      </GetOrdersByEnteredDateResult>
    </GetOrdersByEnteredDateResponse>
  </soap:Body>
</soap:Envelope>
```

10. GetOrdersById

This method is used to retrieve order information for single or multiple orders by type.

10.1 Request

XML Tag Name	Description	Format	Required
GetOrdersById	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderIds	Group	N/A	Y
int	Order ID Value (repeating)	integer	Y
type	Valid Values: - F1040 - F1040PlusWages - W2 - TFV - F1065 - F1120 - F1120S - SSA89 - SSNComplete	string	Y

Example Request:

```
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetOrdersById xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <orderIds>
        <int>1860804</int>
      </orderIds>
      <type>F1040</type>
    </GetOrdersById>
  </soap:Body>
</soap:Envelope>
```

10.2 Response

XML Tag Name	Description	Format
GetOrderInfoResponse	Group	N/A
GetOrderInfoResult	Group	N/A
errorCode	Error Code	string
orderDetail	Group	N/A
orderID	Order ID Input	integer
FirstName	First Name	string
LastName	Last Name	string
DOB	Date of Birth	string
Gender	Gender	string
ResponseCode	For SSA89 Orders, the server response code.	string
PDF	base64Binary Note: PDF is only available for type SSA89. For 4506 type orders, please use the API method "GetTranscript".	base64Binary
orderDate	Order Date Timestamp	DateTime
loanNumber	Reference Number	string
Type	Type	string
SSN	Social Security Number	integer
status	Order Status. Note: Please see section "Order status definitions" for valid order statuses.	string
orderCompletedDate	Order Completed Date	DateTime
ProblemDescription	Problem Description	string
Name	Last Name, First Name	string
Address	Address	string
City	City	string
State	State	string
ZipCode	Zip	integer
Years	Group	N/A
int	Year Value (repeating)	integer
History	Group	N/A
OrderHistoryItem	Group (repeating)	N/A
Date	Activity Date	DateTime
Message	Activity Description	string
MessageType	Activity User – Valid Values CustomerService Client System Problem Internal Wholesale	string

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByIdResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtService.asmx" >
      <GetOrdersByIdResult>
        <errorCode>Success</errorCode>
        <orders>
          <orderDetail>
            <firstName>first</firstName>
            <lastName>last</lastName>
            <DOB></DOB >
            <ResonseCode></ResonseCode>
            <PDF></PDF>
            <orderId>1860804</orderId>
            <orderDate>2012-10-02T13:27:31.127</orderDate>
            <loanNumber>ReferenceNumber</loanNumber>
            <type>W2</type>
            <SSN>1234</SSN>
            <status>NotReceived</status>
            <orderCompletedDate xsi:nil="true" />
            <ProblemDescription/>
            <Name>WebServiceTest, WebServiceTest</Name>
            <Address>123 Street</Address>
            <City>city</City>
            <State>CA</State>
            <ZipCode>92782</ZipCode>
            <Years>
              <int>2011</int>
              <int>2010</int>
            </Years>
            <History>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.233</Date>
                <Message>Order Notes</Message>
                <MessageType>Client</MessageType>
              </OrderHistoryItem>
              <OrderHistoryItem>
                <Date>2012-10-02T13:27:31.24</Date>
                <Message>Order created</Message>
                <MessageType>System</MessageType>
              </OrderHistoryItem>
            </History>
          </orderDetail>
        </orders>
      </GetOrdersByIdResult>
    </GetOrdersByIdResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetOrdersByIdResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetOrdersByIdResult>
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: Username/Password not found</errorMessage>
      </GetOrdersByIdResult>
    </GetOrdersByIdResponse>
  </soap:Body>
</soap:Envelope>
```

11. GetTranscript

This method is used to retrieve a report in PDF format by Order ID.

11.1 Request

XML Tag Name	Description	Format	Required
GetTranscript	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Integer	string	Y
type	Valid Values: - F1040 - F1040PlusWages - W2 - TFV - F1065 - F1120 - F1120S - SSA89 - SSNMatch - SSNDeluxe - SSNComplete	string	Y
Filters	Optional filters to retrieve only specified transcripts.	Group	N
FilterBy	Valid Values Years	string	N
Years	A list of years to filter by, you can enter up to 4 valid years. Valid years are : (Current year – 1) IE: 2012 (Current year – 2) (Current year – 3) (Current year – 4)	string	N

Example Request:

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <GetTranscript xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <orderId>1860804</orderId>
      <type>F1040</type>
    </GetTranscript>
  </soap:Body>
</soap:Envelope>
```

11.2 Response

XML Tag Name	Description	Format
getTranscriptResponse	Group	N/A
getTranscriptResult	Group	N/A
errorCode	Error Code	string
errorMessage	Error Message	string
mimeType	File Type (see section, Supported MimeTypes)	string
documentBytes	Transcript File	Base64Binary

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetTranscriptResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetTranscriptResult>
        <errorCode>Success</errorCode>
        <mimeType>application/pdf</mimeType>
        <documentBytes/>
      </GetTranscriptResult>
    </GetTranscriptResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <GetTranscriptResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <GetTranscriptResult>
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: Exception of type 'VT.BusinessLayer.Exceptions.OrderNot
CompleteException' was thrown.</errorMessage>
      </GetTranscriptResult>
    </GetTranscriptResponse>
  </soap:Body>
</soap:Envelope>
```

12. UploadOrderForm

This method is used to upload signed forms for the specified type.

12.1 Request

XML Tag Name	Description	Format	Required
UploadOrderForm	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Integer	string	Y
documentBytes	A PDF or Zipfile encoded in Base64	Base64Binary	Y
type	Valid Values: • F1040 • W2 • TFV • F1065 • F1120 • F1120S • SSA89 • EVOE • SSNComplete	string	Y

Example Request:

```
<?xml version="1.0" encoding="null"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/" >
  <soap:Body>
    <UploadOrderForm xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx" >
      <login>Username</login>
      <password>Password</password>
      <orderId>1860804</orderId>
      <type>F1040</type>
      <documentBytes>[Base 64 Document]</documentBytes>
    </UploadOrderForm>
  </soap:Body>
</soap:Envelope>
```

12.2 Response

XML Tag Name	Description	Format
UploadOrderFormResponse	Group	N/A
UploadOrderFormResult	Group	N/A
errorCode	Error Code	string
errorMessage	Error Message	string

Example Response (Success):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <UploadOrderFormResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <UploadOrderFormResult>
        <errorCode>Success</errorCode>
      </UploadOrderFormResult>
    </UploadOrderFormResponse>
  </soap:Body>
</soap:Envelope>
```

Example Response (Failure):

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsi="http://www.w
3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" >
  <soap:Body>
    <UploadOrderFormResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx" >
      <UploadOrderFormResult>
        <errorCode>InternalError</errorCode>
        <errorMessage>Internal error: DataPortal.Fetch Failure</errorMessage>
      </UploadOrderFormResult>
    </UploadOrderFormResponse>
  </soap:Body>
</soap:Envelope>
```

13. GetTranscriptWithIncomeVariance

Income Variance compares the difference between the borrower's stated income and the income actually stated on the IRS tax transcript. The variance calculation is displayed on the cover summary sheet for a quick risk analysis of the borrower income.

13.1 Request

XML Tag Name	Description	Format	Required
GetTranscriptWithIncomeVariance	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Order number	integer	Y
incomeVarianceThreshold	Group	NA	Y
IncomeVariance	Repeating group	NA	Y
Year	The year to compare	string	Y
Income	The borrower's reported income for the given year.	decimal	Y

Example request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/">
  <soap:Body>
    <GetTranscriptWithIncomeVariance xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtbservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderId>int</orderId>
      <incomeVarianceThreshold>
        <IncomeVariance>
          <Year>string</Year>
          <Income>decimal</Income>
        </IncomeVariance>
        <IncomeVariance>
          <Year>string</Year>
          <Income>decimal</Income>
        </IncomeVariance>
      </incomeVarianceThreshold>
    </GetTranscriptWithIncomeVariance>
  </soap:Body>
</soap:Envelope>
```

13.2 Response

XML Tag Name	Description	Format
GetTranscriptWithIncomeVarianceResponse	Group	N/A
GetTranscriptWithIncomeVarianceResult	Group	N/A
mimeType	File Type (see section “Supported MimeTypes”)	string
documentBytes	Transcript File	Base64Binary

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/">
  <soap:Body>
    <GetTranscriptWithIncomeVarianceResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <GetTranscriptWithIncomeVarianceResult>
        <mimeType>string</mimeType>
        <documentBytes>base64Binary</documentBytes>
      </GetTranscriptWithIncomeVarianceResult>
    </GetTranscriptWithIncomeVarianceResponse>
  </soap:Body>
</soap:Envelope>
```

14. CreateEsign4506Order

This method is used to create and submit an order with an E-Signed 4506-T form. If you are using e-sign option 2 and have an e-signed 4506-T form from an approved E-signature provider, you may also include the form with this API call or you may use the UploadOrderForm API call to upload the documents .

NOTE: The following changes have been made to the following fields to conform to IRS requirements regarding business tax return requests..

Field	Action	Comment
fiscalEndDateMonth	added	This adds support for fiscal year end dates when requesting tax transcripts for businesses.
ccEmailList	added	Allows the user to provide a list of email addresses that will receive a copy of order status notifications.

14.1 Request

XML Tag Name	Description	Format	Required
CreateEsign4506Order	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
type	Valid Values: - F1040 - F1040PlusWages - W2 - TFV - F1065 - F1120 - F1120S	string	Y
TranscriptType	Valid Values: - A - B - C Note: Required only if type=F1040,F1065, F1120, or F1120S	string	Y
loanNumber	Loan Number	string	N
SSN	Social Security Number	string	Y
firstName	firstName	string	Y
lastName	lastName	string	Y
address	Address	string	N
city	City	string	N
state	State	string	N
zipCode	Zipcode	integer	N
previousAddress	Previous address	string	N
PreviousCity	Previous city	string	N
PreviousState	Previous state	string	N
PreviousZip	Previous zip code	string	N
years	Group	N/A	Y
int	Year Value (repeating)	integer	Y
orderNote	Notes	string	N
uploadedForm	Order Form For Option2, E-Signed 4506-T PDF or zip file	Base64Binary	N
eSignOption	ValidValues: - Option1 - Option2	string	Y
EmailAddress1	Email Address 1 Required if eSignOption == Option1	string	Y
EmailAddress2	Email Address 2	string	N
zipFilePassword	Required only if providing an	string	N

	encrypted zip file.		
fiscalEndDateMonth	If requesting a business return for a business where the fiscal year ends on a month other than December, you can specify that here.	string	N
ccEmailList	Allows the user to provide a list of email addresses that will receive a copy of order status notifications. To enter multiple addresses, separate the emails by a semi-colon	string	N

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/">
  <soap:Body>
    <CreateEsign4506Order xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <type>F1040 </type>
      <TranscriptType>string</TranscriptType>
      <loanNumber>string</loanNumber>
      <SSN>string</SSN>
      <firstName>string</firstName>
      <middleInitial>string</middleInitial>
      <lastName>string</lastName>
      <address>string</address>
      <city>string</city>
      <state>string</state>
      <zipCode>string</zipCode>
      <previousAddress>string</previousAddress>
      <previousCity>string</previousCity>
      <previousState>string</previousState>
      <previousZip>string</previousZip>
      <DOB>string</DOB>
      <gender>string</gender>
      <years>
        <int>int</int>
        <int>int</int>
      </years>
      <orderNote>string</orderNote>
      <uploadedForm>base64Binary</uploadedForm>
      <eSignOption>Option0 or Option1 or Option2</eSignOption>
      <EmailAddress1>string</EmailAddress1>
      <EmailAddress2>string</EmailAddress2>
      <zipFilePassword>string</zipFilePassword>
      <title>string</title>
      <fiscalEndDateMonth>December January</fiscalEndDateMonth>
    </CreateEsign4506Order>
  </soap:Body>
</soap:Envelope>
```

14.2 Response

XML Tag Name	Description	Format
CreateEsign4506OrderResponse	Group	N/A
CreateEsign4506OrderResult	Group	N/A
ifSucceed	Flag indicating if the order was processed	boolean
errorCode	Error Code	string
errorMessage	Error Message	string
orderId	Order ID	integer

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <CreateEsign4506OrderResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <CreateEsign4506OrderResult>
        <ifSucceed>boolean</ifSucceed>
        <errorCode>Success or AuthenticationFailed or AuthorizationFailed or InvalidArgument
or InternalError or OrderDoesNotExist or InvalidOperation or ValueOutOfRange</errorCode>
        <errorMessage>string</errorMessage>
        <orderId>int</orderId>
      </CreateEsign4506OrderResult>
    </CreateEsign4506OrderResponse>
  </soap:Body>
</soap:Envelope>
```

15. GetEsignConfig

This method is used to check what e-sign option a user has access to.

15.1 Request

XML Tag Name	Description	Format	Required
GetEsignConfig	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y

Example request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/">
  <soap:Body>
    <GetEsignConfig xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <username>string</username>
      <password>string</password>
    </GetEsignConfig>
  </soap:Body>
</soap:Envelope>
```

15.2 Response

XML Tag Name	Description	Format
GetEsignConfigResponse	Group	N/A
GetEsignConfigResult	Group	N/A
errorCode	Used to determine if a request was a success.	string
errorMessage	Error message describing any errors with the request.	string
IsEnabled	Flag to determine if eSign is activated.	boolean
ESignOption	The option the user has access to.	string

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/">
  <soap:Body>
    <GetEsignConfigResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <GetEsignConfigResult>
        <errorCode>Success or AuthenticationFailed or AuthorizationFailed or InvalidArgument
or InternalError or OrderDoesNotExist or InvalidOperation or ValueOutOfRange</errorCode>
        <errorMessage>string</errorMessage>
        <IsEnabled>boolean</IsEnabled>
        <ESignOption>Option0 or Option1 or Option2</ESignOption>
      </GetEsignConfigResult>
    </GetEsignConfigResponse>
  </soap:Body>
</soap:Envelope>
```

16. GetXMLTranscript

This method allows a user to pull Tax transcripts for a 4506-T Order (via types F1040 or W2 or TFV or F1065 or F1120 or F1120S or SSA89 or SSNMatch or SSNDeluxe) in XML format as opposed to a PDF document.

16.1 Request

XML Tag Name	Description	Format	Required
GetXMLTranscript	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Integer	string	Y
type	Valid Values: - F1040 - F1040PlusWages - W2 - F1065 - F1120 - F1120S - SSA89 - SSNMatch - SSNDeluxe - SSNComplete - EVOE	string	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/">
  <soap:Body>
    <GetXMLTranscript xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderId>int</orderId>
      <type>F1040 or W2 or TFV or F1065 or F1120 or F1120S or SSA89 or SSNMatch or
SSNDeluxe</type>
    </GetXMLTranscript>
  </soap:Body>
</soap:Envelope>
```

16.2 Response

XML Tag Name	Description	Format
GetXMLTranscriptResponse	Group	N/A
GetXMLTranscriptResult	Group	N/A
XmlResult	String Result	string

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:soap="http://schemas.xmlsoap.org
/soap/envelope/">
  <soap:Body>
    <GetXMLTranscriptResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <GetXMLTranscriptResult>
        <XmlResult>xml</XmlResult>
      </GetXMLTranscriptResult>
    </GetXMLTranscriptResponse>
  </soap:Body>
</soap:Envelope>
```

Note, `<XmlResult>` is dynamically generated based on what is available on the IRS tax transcript. Fields maybe added or removed at the IRS' discretion. Examples of common transcripts in XML format are available in the integration starter kit.

17. CreateVOAOrder

This method allows you to place an order for a Verification of Account. For more information and access to this product, please contact your account manager.

17.1 Request

XML Tag Name	Description	Format	Required
CreateVOAOrder	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
referenceNumber	Reference Number	string	N
firstName	Borrower First Name	string	Y
lastName	Borrower Last Name	string	Y
email	Borrower E-Mail Address	string	Y
monthlyIncome	Monthly Income Amount	string	N
employerName	Borrower Employer	string	N
SSN	The Social Security Number	string	Y
reserveAmount	Required Reserves	string	N

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <CreateVOAOrder xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <referenceNumber>string</referenceNumber>
      <firstName>string</firstName>
      <lastName>string</lastName>
      <email>string</email>
      <monthlyIncome>string</monthlyIncome>
      <employerName>string</employerName>
      <SSN>string</SSN>
      <reserveAmount>string</reserveAmount>
    </CreateVOAOrder>
  </soap:Body>
</soap:Envelope>
```

17.2 Response

XML Tag Name	Description	Format
CreateVOAOrderResponse	Group	N/A
CreateVOAOrderResult	Group	N/A
ifSucceed	Success flag.	boolean
errorCode	Error Code	string
errorMessage	Error Message	string
orderId	Order ID	integer

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <CreateVOAOrderResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <CreateVOAOrderResult>
        <ifSucceed>boolean</ifSucceed>
        <errorCode>Success</errorCode>
        <errorMessage>string</errorMessage>
        <orderId>int</orderId>
      </CreateVOAOrderResult>
    </CreateVOAOrderResponse>
  </soap:Body>
</soap:Envelope>
```

18. GetVOABYID

This method is used to retrieve a VOA order by Order ID

18.1 Request

XML Tag Name	Description	Format	Required
GetVOABYID	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Integer	string	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOABYID xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderId>int</orderId>
    </GetVOABYID>
  </soap:Body>
</soap:Envelope>
```

18.2 Response

XML Tag Name	Description	Format
GetVOABByIDResponse	Group	N/A
GetVOABByIDResult	Group	N/A
errorMessage	String	string
errorCode		string
VOAorderDetail	Group	N/A
orderNumber	Order Number	integer
Status	Status of order	string
orderDate	Date ordered	DateTime
loanNumber	Loan number for reference	string
SSN	Social security number	string
FirstName	Borrower's First Name	string
LastName	Borrower's Last Name	string
Email	Email Address	string
MonthlyIncome	Monthly Income Reported	string
EmployerName	Employer name	string
AccountMonitoring	Account Monitoring Duration Possible Values: 1,30,60,90	string
ReserveAmount	Required reserves	string
AccountCheckStatus	Account Check Status	string
LastGeneratedon	The date the report was last generated	dateTime
AdditionalInfo	Additional information about the order	string
OrderStatusCode	Status Code	string
PDF	Base64Binary	Base64binary
FinantialInsituteList	Group	N/A
FIStructure	Repeating group item	N/A
History	Group	N/A
HistoryItemVOA	Repeating group item	N/A

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOABYIDResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <GetVOABYIDResult>
        <errorMessage>string</errorMessage>
        <errorCode>Success</errorCode>
        <VOAorderDetail>
          <orderNumber>int</orderNumber>
          <Status>Received </Status>
          <orderDate>dateTime</orderDate>
          <loanNumber>string</loanNumber>
          <SSN>string</SSN>
          <FirstName>string</FirstName>
          <LastName>string</LastName>
          <Email>string</Email>
          <MonthlyIncome>string</MonthlyIncome>
          <EmployerName>string</EmployerName>
          <AccountMonitoring>string</AccountMonitoring>
          <ReserveAmount>string</ReserveAmount>
          <AccountCheckStatus>string</AccountCheckStatus>
          <LastGeneratedon>dateTime</LastGeneratedon>
          <AdditionalInfo>string</AdditionalInfo>
          <FinantialInsituteList>
            <FIStructure xsi:nil="true" />
            <FIStructure xsi:nil="true" />
          </FinantialInsituteList>
          <History>
            <HistoryItemVOA xsi:nil="true" />
            <HistoryItemVOA xsi:nil="true" />
          </History>
        </VOAorderDetail>
      </GetVOABYIDResult>
    </GetVOABYIDResponse>
  </soap:Body>
</soap:Envelope>
```

19. GetVOAFIRReport

This method is used to retrieve a financial report file by Order ID and financial ID

19.1 Request

XML Tag Name	Description	Format	Required
GetVOAFIRReport	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Integer	string	Y
fID	Financial Institution ID	int	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOAFIRReport xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderId>int</orderId>
      <fID>int</fID>
    </GetVOAFIRReport>
  </soap:Body>
</soap:Envelope>
```

19.2 Response

XML Tag Name	Description	Format
GetVOAFIReportResponse	Group	N/A
GetVOAFIReportResult	Group	N/A
mimeType	String	string
documentBytes	base64Binary	base64Binary

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOAFIReportResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <GetVOAFIReportResult>
        <mimeType>string</mimeType>
        <documentBytes>base64Binary</documentBytes>
      </GetVOAFIReportResult>
    </GetVOAFIReportResponse>
  </soap:Body>
</soap:Envelope>
```

20. GetVOAPDFReport

This method is used to retrieve a transcript file by Order ID.

20.1 Request

XML Tag Name	Description	Format	Required
GetVOAPDFReport	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderId	Integer	string	Y
reportType	Report type requested Valid values: - Summary - Detail	string	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOAPDFReport xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderId>int</orderId>
      <reportType>Summary or Detail</reportType>
    </GetVOAPDFReport>
  </soap:Body>
</soap:Envelope>
```

20.2 Response

XML Tag Name	Description	Format
GetVOAPDFReportResponse	Group	N/A
GetVOAPDFReportResult	Group	N/A
mimeType	String	string
documentBytes	base64Binary	base64Binary

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOAPDFReportResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <GetVOAPDFReportResult>
        <mimeType>string</mimeType>
        <documentBytes>base64Binary</documentBytes>
      </GetVOAPDFReportResult>
    </GetVOAPDFReportResponse>
  </soap:Body>
</soap:Envelope>
```

21. CreateBusinessVOAOrder

This method is used to Create a VOA Order for a business account.

21.1 Request

XML Tag Name	Description	Format	Required
GetVOAPDFReport	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
referenceNumber	Reference number	string	Y
BusinessName	Name of business	string	Y
contactFirstName	First Name	string	Y
contactLastName	Last Name	string	Y
email	Contact email	string	Y
EIN	Employer Identification Number	string	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <CreateBusinessVOAOrder xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <referenceNumber>string</referenceNumber>
      <BusinessName>string</BusinessName>
      <contactFirstName>string</contactFirstName>
      <contactLastName>string</contactLastName>
      <email>string</email>
      <EIN>string</EIN>
    </CreateBusinessVOAOrder>
  </soap:Body>
</soap:Envelope>
```

21.2 Response

XML Tag Name	Description	Format
CreateBusinessVOAOrderResponse	Group	N/A
CreateBusinessVOAOrderResult	Group	N/A
ifSucceed	boolean	string
errorCode	Possible Return values • Success • AuthenticationFailed • AuthorizationFailed • InvalidArgument • InternalError • OrderDoesNotExist • InvalidOperation • ValueOutOfRange	string
errorMessage	Error message details	string
orderId	Order ID if order successfully created	integer

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <CreateBusinessVOAOrderResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <CreateBusinessVOAOrderResult>
        <ifSucceed>boolean</ifSucceed>
        <errorCode> </errorCode>
        <errorMessage>string</errorMessage>
        <orderId>int</orderId>
      </CreateBusinessVOAOrderResult>
    </CreateBusinessVOAOrderResponse>
  </soap:Body>
</soap:Envelope>
```

22. CreateVOEOrder

This method is used to Create a Verification Of Employment order.

22.1 Request

XML Tag Name	Description	Format	Required
CreateVOEOrder	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
referenceNumber	Reference number	string	Y
Applicants	Group	N/A	Y
ApplicantInfo	Repeating Group	N/A	Y
FirstName	First name	string	Y
LastName	Last name	string	Y
Employers	Group	N/A	Y
EmployerInfo	Employer information container	N/A	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <CreateVOEOrder xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <referenceNumber>string</referenceNumber>
      <Applicants>
        <ApplicantInfo>
          <FirstName>string</FirstName>
          <LastName>string</LastName>
          <SSN>string</SSN>
          <Employers>
            <EmployerInfo xsi:nil="true" />
            <EmployerInfo xsi:nil="true" />
          </Employers>
        </ApplicantInfo>
        <ApplicantInfo>
          <FirstName>string</FirstName>
          <LastName>string</LastName>
          <SSN>string</SSN>
          <Employers>
            <EmployerInfo xsi:nil="true" />
            <EmployerInfo xsi:nil="true" />
          </Employers>
        </ApplicantInfo>
      </Applicants>
    </CreateVOEOrder>
  </soap:Body>
</soap:Envelope>
```

22.2 Response

XML Tag Name	Description	Format
CreateVOEOrderResponse	Group	N/A
CreateVOEOrderResult	Group	N/A
ifSucceed	boolean	string
errorCode	Possible Return values • Success • AuthenticationFailed • AuthorizationFailed • InvalidArgument • InternalError • OrderDoesNotExist • InvalidOperation • ValueOutOfRange	string
errorMessage	Error message details	string
orderId	Order ID if order successfully created	integer

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <CreateVOEOrderResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <CreateVOEOrderResult>
        <ifSucceed>boolean</ifSucceed>
        <errorCode> </errorCode>
        <errorMessage>string</errorMessage>
        <orderId>int</orderId>
      </CreateVOEOrderResult>
    </CreateVOEOrderResponse>
  </soap:Body>
</soap:Envelope>
```

23. GetVOABusinessByID

This method is used to Create a VOA Order for a business account.

23.1 Request

XML Tag Name	Description	Format	Required
CreateVOEOrder	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderID	Order id	integer	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOABusinessByID xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderID>int</orderID>
    </GetVOABusinessByID>
  </soap:Body>
</soap:Envelope>
```

23.2 Response

XML Tag Name	Description	Format
GetVOABusinessByIDResponse	Group	N/A
GetVOABusinessByIDResult	Group	N/A
ifSucceed	boolean	string
errorMessage	Error details	string
errorCode	Possible Return values • Success • AuthenticationFailed • AuthorizationFailed • InvalidArgument • InternalError • OrderDoesNotExist • InvalidOperation • ValueOutOfRange	string
VOAorderDetail	Group	N/A
orderNumber	Order Number	Int
Status	Possible Values: • Received • InProgress • Completed • Rejected • Canceled • Monitoring	string
orderDate	Order date	dateTime
loanNumber	Loan number	string
SSN	Social Security Number	string
FirstName	First Name	string
LastName	Last name	string
BusinessName	Business Name	string
ContactFirstName	Contact First Name	string
ContactLastName	Contact Last Name	string
Email	Email	string
MonthlyIncome	Monthly income	string
EmployerName	Employer name	string
AccountMonitoring	Account monitoring	string
ReserveAmount	Reserve amount	string
AccountCheckStatus	Account check status	string
LastGeneratedon	Date report was last generated	dateTime
AdditionalInfo	Additional information	string
FinantialInsituteList	Group	N/A
FIStructure	Group Item	N/A
OrderTypeVoa	Individual or Business	string
History	Group	N/A
HistoryItemVOA	Group Item	N/A

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOABusinessByIDResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtbservice.asmx">
      <GetVOABusinessByIDResult>
        <errorMessage>string</errorMessage>
        <errorCode> </errorCode>
        <VOAorderDetail>
          <orderNumber>int</orderNumber>
          <Status </Status>
          <orderDate>dateTime</orderDate>
          <loanNumber>string</loanNumber>
          <SSN>string</SSN>
          <FirstName>string</FirstName>
          <LastName>string</LastName>
          <BusinessName>string</BusinessName>
          <ContactFirstName>string</ContactFirstName>
          <ContactLastName>string</ContactLastName>
          <Email>string</Email>
          <MonthlyIncome>string</MonthlyIncome>
          <EmployerName>string</EmployerName>
          <AccountMonitoring>string</AccountMonitoring>
          <ReserveAmount>string</ReserveAmount>
          <AccountCheckStatus>string</AccountCheckStatus>
          <LastGeneratedon>dateTime</LastGeneratedon>
          <AdditionalInfo>string</AdditionalInfo>
          <FinantialInsituteList>
            <FIStructure xsi:nil="true" />
            <FIStructure xsi:nil="true" />
          </FinantialInsituteList>
          <OrderTypeVoa>Individual or Business</OrderTypeVoa>
          <History>
            <HistoryItemVOA xsi:nil="true" />
            <HistoryItemVOA xsi:nil="true" />
          </History>
        </VOAorderDetail>
      </GetVOABusinessByIDResult>
    </GetVOABusinessByIDResponse>
  </soap:Body>
</soap:Envelope>
```

24. GetVOEByID

This method is used to retrieve a VOE order by Order ID. for VOE Order.

24.1 Request

XML Tag Name	Description	Format	Required
GetVOEByID	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderID	Order id	integer	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOEByID xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderID>int</orderID>
    </GetVOEByID>
  </soap:Body>
</soap:Envelope>
```

24.2 Response

XML Tag Name	Description	Format
GetVOEByIDResponse	Group	N/A
GetVOEByIDResult	Group	N/A
errorMessage	Error details	string
errorCode	Possible Return values • Success • AuthenticationFailed • AuthorizationFailed • InvalidArgument • InternalError • OrderDoesNotExist • InvalidOperation • ValueOutOfRange	string
VoeOrderDetail	Group	N/A
orderNumber	Order Number	Int
Status	Possible Values: • Received • InProgress • Completed • Rejected • Canceled • Monitoring	string
orderDate	Order date	dateTime
loanNumber	Loan number	string
Borrowers	Group	N/A
Borrower	Group Item	N/A
History	Group	N/A
HistoryItemVOEEverest	Group Item	N/A

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOEByIDResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <GetVOEByIDResult>
        <errorMessage>string</errorMessage>
        <errorCode> </errorCode>
        <VoeOrderDetail>
          <orderNumber>int</orderNumber>
          <reverifiedOrderNumber>int</reverifiedOrderNumber>
          <Status> </Status>
          <orderDate>dateTime</orderDate>
          <loanNumber>string</loanNumber>
          <Borrowers>
            <Borrower xsi:nil="true" />
            <Borrower xsi:nil="true" />
          </Borrowers>
          <History>
            <HistoryItemVOEEverest xsi:nil="true" />
            <HistoryItemVOEEverest xsi:nil="true" />
          </History>
        </VoeOrderDetail>
      </GetVOEByIDResult>
    </GetVOEByIDResponse>
  </soap:Body>
</soap:Envelope>
```

25. ReverifyVOEOrder

This method is used to retrieve a VOE order by Order ID. for VOE Order.

25.1 Request

XML Tag Name	Description	Format	Required
ReverifyVOEOrder	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderID	Order id	integer	Y
employerID	Employer ID	Integer	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <ReverifyVOEOrder xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderID>int</orderID>
      <employerID>int</employerID>
    </ReverifyVOEOrder>
  </soap:Body>
</soap:Envelope>
```

25.2 Response

XML Tag Name	Description	Format
ReverifyVOEOrderResponse	Group	N/A
ReverifyVOEOrderResult	Group	N/A
ifSucceed	Flag indicating successful response	Boolean
errorMessage	Error details	string
errorCode	Possible Return values • Success • AuthenticationFailed • AuthorizationFailed • InvalidArgument • InternalError • OrderDoesNotExist • InvalidOperation • ValueOutOfRange	string
orderId	Order Number	Int

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <ReverifyVOEOrderResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <ReverifyVOEOrderResult>
        <ifSucceed>boolean</ifSucceed>
        <errorCode> </errorCode>
        <errorMessage>string</errorMessage>
        <orderId>int</orderId>
      </ReverifyVOEOrderResult>
    </ReverifyVOEOrderResponse>
  </soap:Body>
</soap:Envelope>
```

26. GetVOEPDFResult

This method is used to retrieve a VOE order report.

26.1 Request

XML Tag Name	Description	Format	Required
GetVOEPDFResult	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderID	Order id	integer	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOEPDFResult xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderID>int</orderID>
    </GetVOEPDFResult>
  </soap:Body>
</soap:Envelope>
```

26.2 Response

XML Tag Name	Description	Format
GetVOEPDFResultResponse	Group	N/A
GetVOEPDFResultResult	Group	N/A
mimeType	Error details	string
documentBytes	Report PDF in base 64	Base64

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOEPDFResultResponse xmlns="https://secure.veri-
tax.com/soap/PublicAPI/vtservice.asmx">
      <GetVOEPDFResultResult>
        <mimeType>string</mimeType>
        <documentBytes>base64Binary</documentBytes>
      </GetVOEPDFResultResult>
    </GetVOEPDFResultResponse>
  </soap:Body>
</soap:Envelope>
```

27. GetVOAUserURL

Gets the URL for the VOA order.

27.1 Request

XML Tag Name	Description	Format	Required
GetVOAUserURL	Group	N/A	Y
login	Login ID	string	Y
password	Password	string	Y
orderID	Order id	integer	Y

Example Request

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOAUserURL xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <login>string</login>
      <password>string</password>
      <orderID>int</orderID>
    </GetVOAUserURL>
  </soap:Body>
</soap:Envelope>
```

27.2 Response

XML Tag Name	Description	Format
GetVOAUserURLResponse	Group	N/A
GetVOAUserURLResult	Group	N/A
VoaUrl	URL	string

Example Response

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:soap="http://schemas.xmlsoap.org/soap/envelope/">
  <soap:Body>
    <GetVOAUserURLResponse xmlns="https://secure.veri-tax.com/soap/PublicAPI/vtservice.asmx">
      <GetVOAUserURLResult>
        <VoaUrl>string</VoaUrl>
      </GetVOAUserURLResult>
    </GetVOAUserURLResponse>
  </soap:Body>
</soap:Envelope>
```

28. Error Code Definitions

Error Code	Description
Success	Success transaction
AuthenticationFailure	Invalid credentials
AuthorizationFailure	Invalid product request
InvalidArgument	Invalid request
OrderDoesNotExist	Order ID is invalid
InvalidOperation	Invalid request format
ValueOutOfRange	Invalid data value
InternalError	Contact us

29. Supported MimeTypes

Name	MimeType
Portable Document Format	application/pdf
ZIP Archive	application/zip

30. Binary Encoding

Base64Binary – Binary Content encoded as base64. The Veri-Tax™ system will encode binary content as base64 strings for transfer over the standard SOAP protocol. Use the provided Mime Type in the SOAP response to determine the type of binary content when decoding.

31. Fiddler Web Debugger

Fiddler web debugger is a free tool that we use heavily in-house for testing webservice. We recommend using this tool for testing and analyzing your SOAP-based calls to our service.

For more information , please visit the fiddler website <http://fiddler2.com>

32. Order Status Code Definitions

32.1 Order status codes for type F1040, F1040PlusWages, W2, TFV, F1065, F1120, F1120S

Status Code	Description
NotReceived	Waiting for outstanding signed 4506-T form to be uploaded/faxed.
Received	Signed 4506-T form received, waiting for Veri-Tax QC approval.
InProgress	Signed 4506-T form received, order in progress, waiting for IRS approval
Rejected	4506-T form rejected by Veri-Tax QC dept.
Completed	IRS completed order.
Problem	4506-T rejected by the IRS.
Canceled	4506-T order canceled.

32.2 Order status codes for type SSA89

Status Code	Description
Error	An error occurred while attempting to process the request.
Pending	Signed Form SSA89 received, waiting for Veri-Tax QC approval.
PendingUpload	Waiting for outstanding signed Form SSA89 to be uploaded.
Completed	Order has been completed.
Queued	In progress, waiting for SSA response.
Rejected	SSA89 Form rejected.

32.3 Order status codes for type SSNComplete

Status Code	Description
Error	An error occurred while attempting to process the request
Pending	Signed Form SSA89 received, waiting for Veri-Tax QC approval.
PendingUpload	Waiting for outstanding signed Form SSA89 to be uploaded.
Completed	Order has been completed.
Queued	In progress, waiting for SSA response.
Rejected	SSA89 Form rejected.

32.4 Order status codes for type SSNMatch

Status Code	Description
Match	Subject SSN is valid.
Maybe	Subject SSN cannot be verified.
NoMatch	Subject SSN is not valid.
NotPulled	Order is pending.

32.5 Order status codes for type SSNDeluxe

Not Applicable

33. Frequently Asked Questions

Do you have “Magic Numbers”/ Support for automated testing?

There is no support for automated testing or “Magic numbers” at this time. However, this is on our roadmap.

Can we cancel an order through the webservice?

There is no method for cancelling an order at this time. If you wish to cancel an order, please contact a customer happiness representative.

What is the IRS Form 4506-T?

Form 4506-T is an Internal Revenue Service (IRS) document that is used to retrieve past tax returns, W-2, and 1099 transcripts that are on file with the IRS. The document gives permission for a third party to retrieve the tax payer’s data. The taxpayer must sign and date the 4506-T.

IRS Form 4506-T: <http://www.irs.gov/pub/irs-pdf/f4506t.pdf>

What is the difference between the IRS Form 4506 and the IRS Form 4506-T?

The IRS Form 4506 is used to retrieve photo copies of the tax returns that were filed by the taxpayer. 4506 can take the IRS up to 60 days to complete. The IRS Form 4506-T is used to obtain IRS Tax TRANSCRIPTS. The 4506-T usually takes 1 business day to obtain from the IRS. Veri-tax specializes in 4506-T processing and does not offer 4506 services.

How long does it take to receive transcripts?

Completed transcripts usually are received in 1 - 2 business days and some are completed on the same business day.

What is the difference between a “Copy of the IRS Tax Return” and an “IRS Tax Transcript” ?

An IRS Tax TRANSCRIPT is a line per line breakdown of the full tax return or data filed by the taxpayer or employer (W-2 & 1099). The photocopy of the return is a copy of the return filed. Tax Transcripts are obtained much more quickly than copies of tax returns. The photocopy is obtained by using the 4506 (not the 4506-T) and takes around 60 days for the IRS to process. Veri-tax does **not** process the IRS 4506, instead specializing in fast processing of 4506-T.

What do the Transcript types A, B and C mean?

These pertain to Line 6 of the 4506-T and are different transcript types that may be ordered from the IRS.

Letter Option	Transcript Type
A	Return Transcript
B	Account Transcripts
C	Record of Account

34. Troubleshooting

Tags seem correct but the call still fails.

The Veri-Tax system uses SOAP messaging as the communication protocol. It is a specific instance of the XML language and must adhere to the XML specifications. One specification is that XML is case-sensitive. Therefore, SOAP is case-sensitive as well. A common error we have experienced in the past is that some system implementation solutions send all tags in lowercase. Please check the service description for the proper capitalization of the tags.

For more information on the XML specifications, please visit <http://www.w3.org/TR/2008/REC-xml-20081126/#sec-terminology>

We are trying to integrate with your system. I am using the User Name and Password provided but I cannot log-in.

Often, the production endpoint is used by mistake during the initial integration stage. Please see section **“Service Description, Endpoints and Environment Information”** for the correct environment endpoint to use for your initial setup.

We are trying to order product xyz but are receiving “not authorized” or “invalid argument”. Our credentials seem to work for other calls.

Please check if your company is allowed to order the product in question.

35. Reporting errors

If you are experiencing errors trying to connect to our web services or interruptions to your service, you may either

1. Call our customer happiness line at 1-800-969-5100.
2. Email customerhappiness@veri-tax.com

When contacting us, please be ready to provide us with as much of the following pieces of information so that we can assist you promptly and investigate any issues thoroughly.

- Webservice username
- Company Name
- The location of your server accessing the API
- The URL of the endpoint you are using
- The type of error you are experiencing in as much detail as possible.
- Any error messages or logs you may have
- Screen shots
- Date and time of the reported issue
- Behavior of the incidents (is there a pattern? Is it periodic? If periodic, what percentages of the requests are having issues?)
- Are you using a proxy or a firewall?
- Any information that may be relevant

36. Technical Support

Veri-Tax may charge for integration service support that exceeds standard hours. Please be sure to check your service contract for any associated integration costs or fees.

37. Disclaimer

The Veri-Tax development team has made every effort to ensure the accuracy of the information provided in this document and supporting files provided with our starter kit. However, due to the possibility of inadvertent errors that may have occurred when inputting information and frequent modification of the codebase on testing servers, Veri-Tax does not guarantee the accuracy of the information in the provided documents. Changes may have been made to the code base since the last modification of this document. Veri-Tax strongly urges the developer accessing the API to compare their code to the latest WSDL for the environment(s) their application is pointing to. Sample code and examples are provided “as is” to provide a fundamental understanding on using our API. The sample code and examples are by no means intended to be “production ready”.

38. Document History

38.1 Author information

Author: Ben Delmundo
Date Created: November 14, 2012

38.2 Document Change History

Changed By	Date	Notes	Document Version
BEN DELMUNDO	11/14/2012	Creation of document.	3.0.0
BEN DELMUNDO	11/29/2012	Corrected samples.	3.0.1
BEN DELMUNDO	01/15/2013	Add Verification Of Employment	3.0.2
BEN DELMUNDO	01/16/2013	- Add Filters to Get transcript. - Add Option for IncomeVariance - Add Support for obtaining specific transcript years.	3.0.3
BEN DELMUNDO	01/22/2013	Add CreateEsign4506Order API call.	3.0.4
BEN DELMUNDO	04/05/2013	Add GetEsignConfig API Call documentation.	3.0.5
BEN DELMUNDO	04/25/2013	Add GetXMLTranscript API Call documentation	3.0.6
BEN DELMUNDO	05/07/2013	Approved for client release.	3.0.7
BEN DELMUNDO	05/15/2013	As of version 3.0.8, a company can request to have the loan number field required for 4506-T orders.	3.0.8
BEN DELMUNDO	06/11/2013	Added XML return type for SSN products	3.0.9
BEN DELMUNDO	06/13/2013	Added - order work flow diagram - Environment details - Transport security information - SOAP Protocol information - Frequently Asked Questions	3.0.9
BEN DELMUNDO	08/14/2013	Added - Additional fields to support previous addresses - Support for 1040 plus wages - Support for SSNComplete Product	3.1.0
BEN DELMUNDO	09/18/2013	Added Additional IP addresses for whitelisting.	3.1.1

		Support for Zip file in UploadOrderForm method	
BEN DELMUNDO	09/30/2013	Added - Additional IP addresses for whitelisting - VOE results in PDF format	3.1.2
BEN DELMUNDO	10/23/2013	Added - Verification of Account Support - Password expiration policy information - Additional workflow diagrams	3.1.3
BEN DELMUNDO	11/22/2013	Added - Additional IP for whitelisting - Field requirement change: CreateOrder(), gender field made optional.	3.1.4
BEN DELMUNDO	12/11/2013	Added - Support for Business Verification of Accounts - New Verification of Employment methods	3.1.5
BEN DELMUNDO	1/17/2014	Added Support for VOE and SSN Complete XML reports	3.1.6
BEN DELMUNDO	2/12/2014	Removed deprecated VOE methods Added XML Support for additional products	3.1.7
BEN DELMUNDO	3/19/2014	- Updated 4506T workflow - VOA – monthlyIncome and employerName made optional	3.1.8
BEN DELMUNDO	4/9/2014	- SSA-89 Changes for Create Order API call - UploadForm for CreateEsign4506T API Call using Option 2 is now optional.	3.1.9
BEN DELMUNDO	5/14/2014	Return full SSN in SSN field for get order info	3.2.0
BEN DELMUNDO	6/11/2014	- Added support for getVOAUserURL - Cleaned document	3.2.1
BEN DELMUNDO	7/1/2014	- Fiscal year end date support for business returns - Added support for SSA89 and SSNComplete rejection reasons	3.2.2

BEN DELMUNDO	7/25/2014	• CreateOrder and CreateEsign4506Order – added support for providing a list of additional email addressed to receive order status updates.	3.2.3
TRAVIS RAY	8/24/2016	• Additional Transcript Type (F1120S) support added.	3.2.4