Tax Verification Guide

This guide will walk you step-by-step through the tax verification process for the financial aid application.

Questions? You can view/download the Tax Verification FAQs PDF on the [Tax Verification help page]

Need more help?

We encourage you to keep this guide open as you complete these steps to help answer questions and provide explanation when needed. But if you get stuck, you can contact us at:

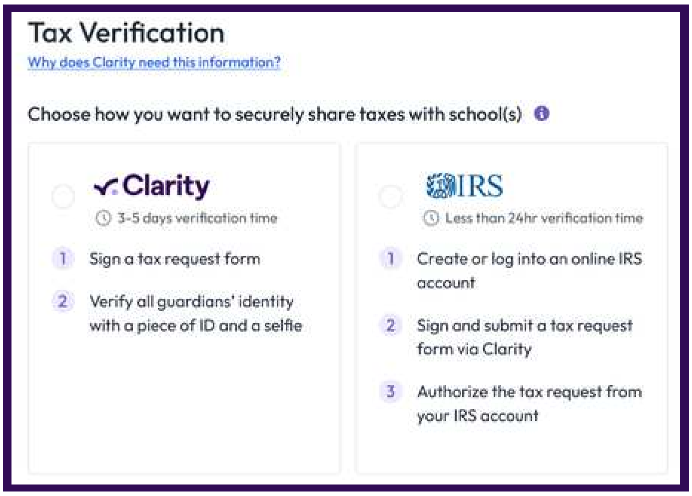
support@clarityapp.com

Tax Verification

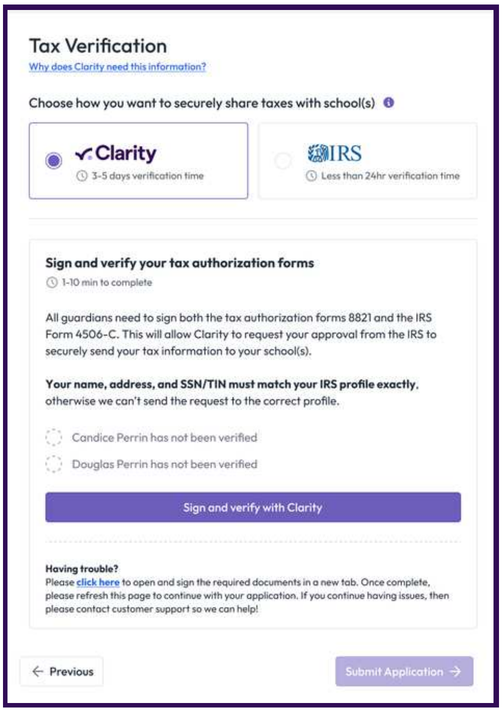
Clarity

STEP 1 - SELECT YOUR VERIFICATION PROCESS

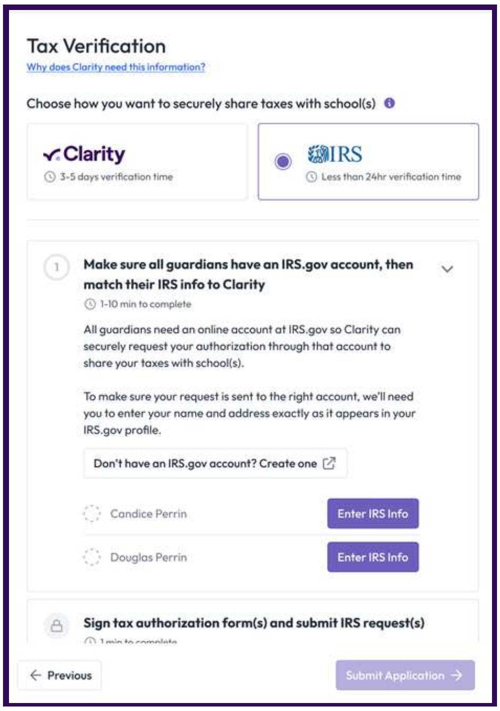
- You will have the option to verify through Clarity or through the IRS website.
- You can review the step-by-step directions for both processes in this guide.



Choose between verifying on Clarity or through the IRS



Continue to the next page (Page 03) for the step-by-step verification process through Clarity



Continue to Page 07 for the step-by-step verification process through the IRS

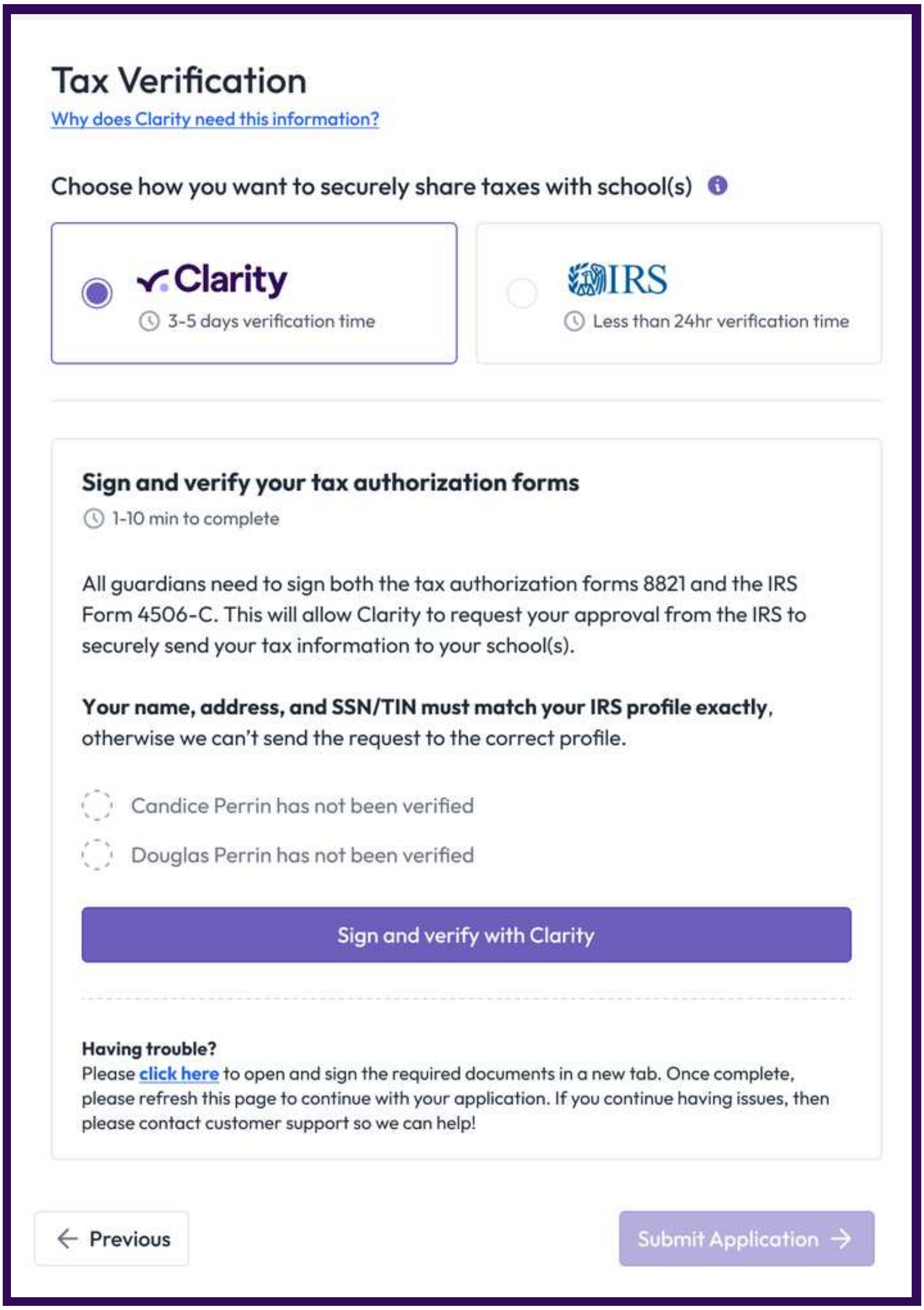
Tax Verification

Clarity Verification Process

STEP 1 - SIGN THE FORMS

- During this process, you will sign both the 8821 and 4506c, which are tax authorization forms.

Start by clicking the “Sign and verify with Clarity button”. This will take you to the forms to e-sign both tax documents and tax authorization consent

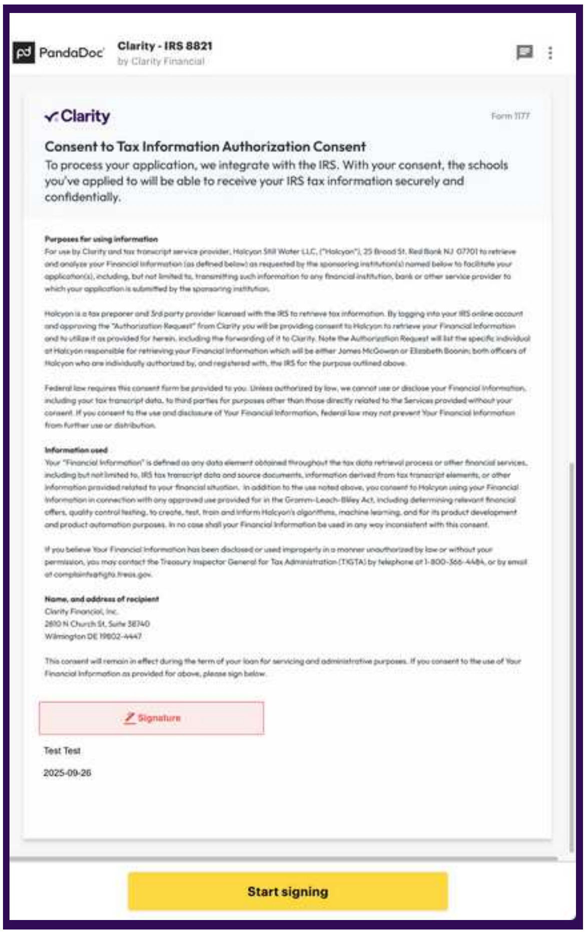


Tax Verification

Clarity

STEP 1 - SIGN THE FORMS (CONT'D)

- Both the 8821 and 4506c forms will be signed in the same digital document. You will start with the 8821, and then continue down to the 4506c after the Tax Authorization consent form is signed.
- You will sign the forms and complete verification for each guardian separately. Once verification is completed for the first guardian listed, the process will start for the second guardian

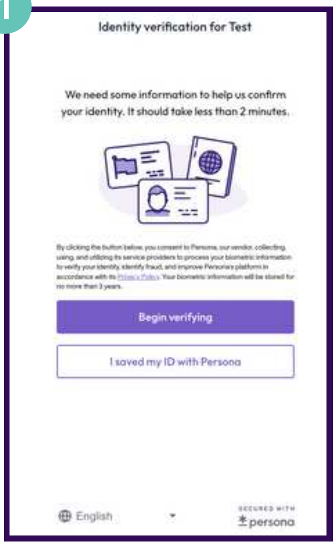


Tax Verification

STEP 2 - VERIFY YOUR IDENTITY

- Each guardian will need to complete this verification step. If the other guardian is not available, you will have the option to send them an email with the steps.
- The verification can either be completed on the device you are using, or a different device if it's easier. (Computer with camera, mobile phone, tablet)

1



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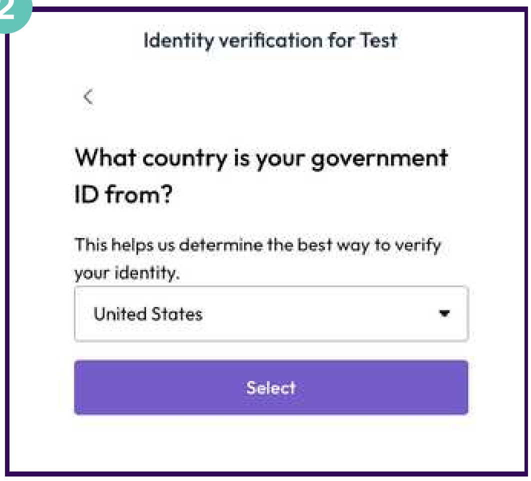

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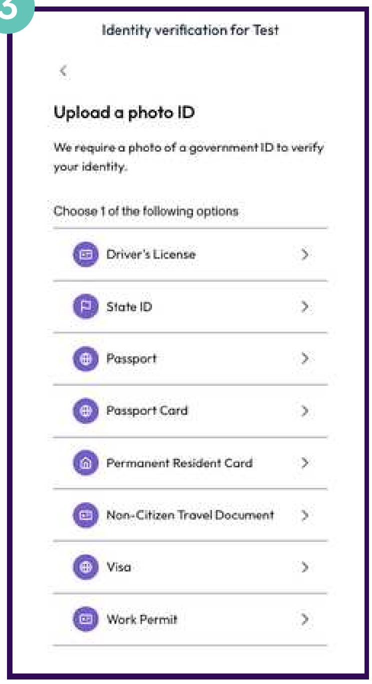

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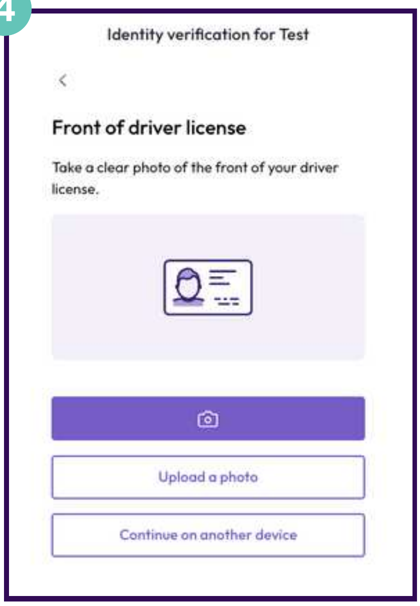

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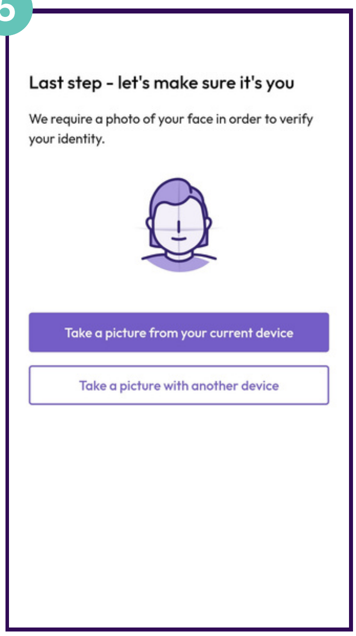
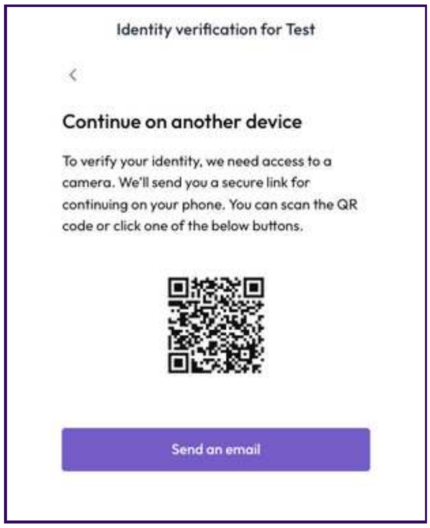


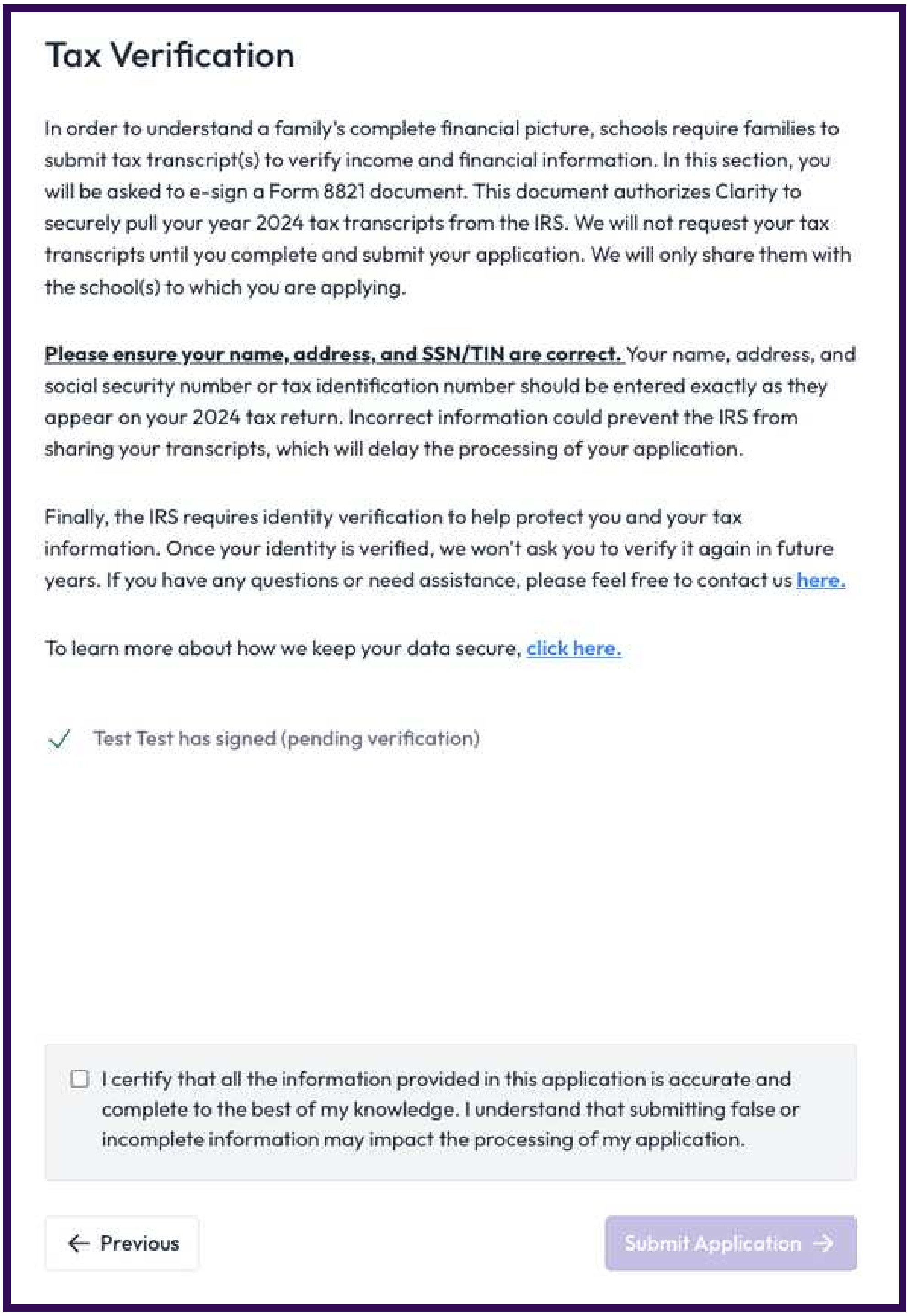


If you select "Continue on another device", you can either scan the QR code with your mobile device or send an email with an access link.

Tax Verification

STEP 3 - SUBMIT YOUR APPLICATION

- Once verification is completed for all guardians, you will be brought back to the page where you can submit your application.
- If verification failed through Persona, you can still submit the application. Our manual verification team will review it and reach out if any additional information is needed.



Tax Verification

In order to understand a family's complete financial picture, schools require families to submit tax transcript(s) to verify income and financial information. In this section, you will be asked to e-sign a Form 8821 document. This document authorizes Clarity to securely pull your year 2024 tax transcripts from the IRS. We will not request your tax transcripts until you complete and submit your application. We will only share them with the school(s) to which you are applying.

Please ensure your name, address, and SSN/TIN are correct. Your name, address, and social security number or tax identification number should be entered exactly as they appear on your 2024 tax return. Incorrect information could prevent the IRS from sharing your transcripts, which will delay the processing of your application.

Finally, the IRS requires identity verification to help protect you and your tax information. Once your identity is verified, we won't ask you to verify it again in future years. If you have any questions or need assistance, please feel free to contact us here.

To learn more about how we keep your data secure, click here.

✓ Test Test has signed (pending verification)

☐ I certify that all the information provided in this application is accurate and complete to the best of my knowledge. I understand that submitting false or incomplete information may impact the processing of my application.

← Previous

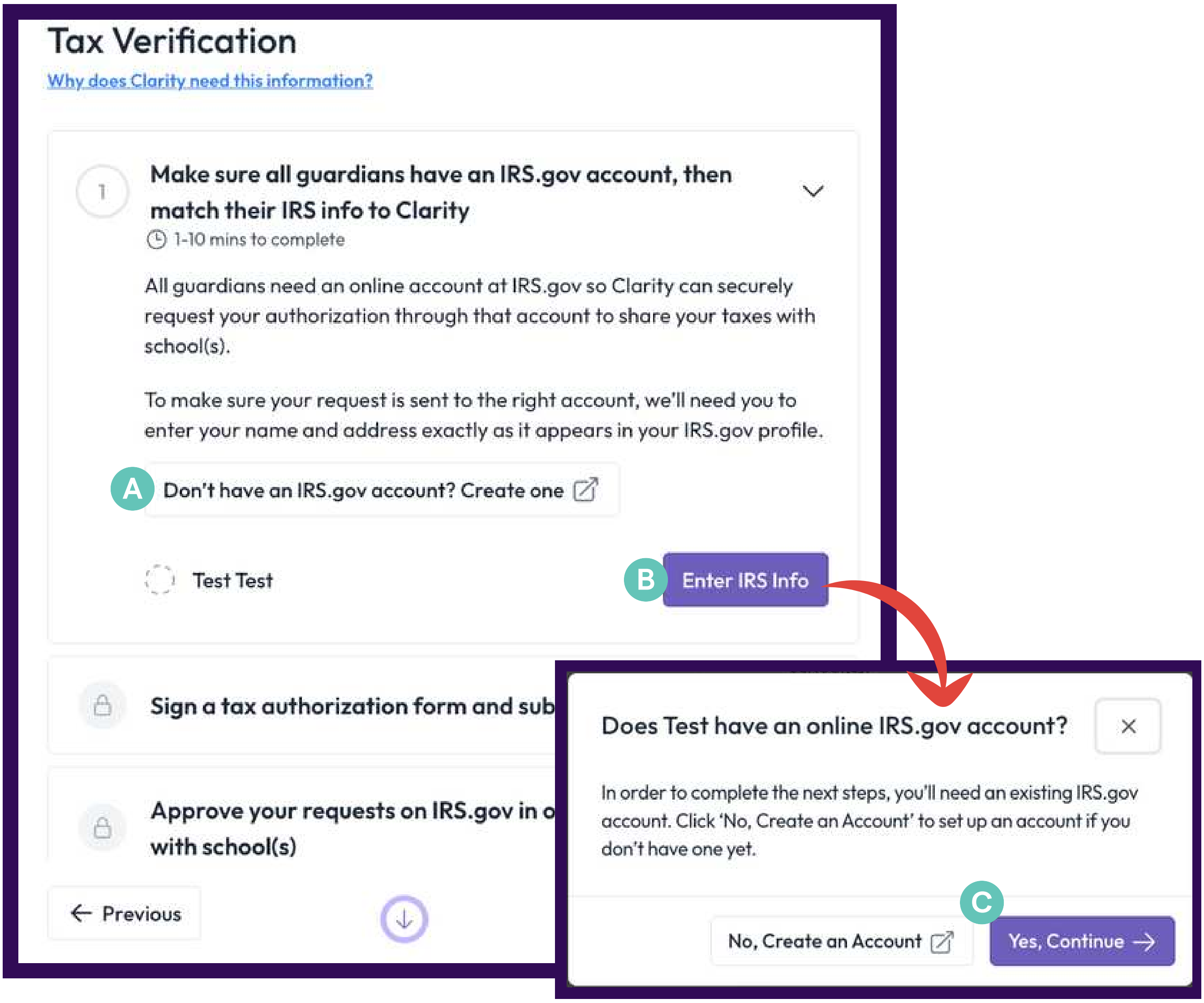
Submit Application →

Tax Verification

IRS Verification Process

STEP 1 - CREATE/CONFIRM IRS ACCOUNT

- Each guardian will need to create their own individual IRS account.
- If you already have an account, simply click the button to enter your IRS info and skip to page 10 of this guide.

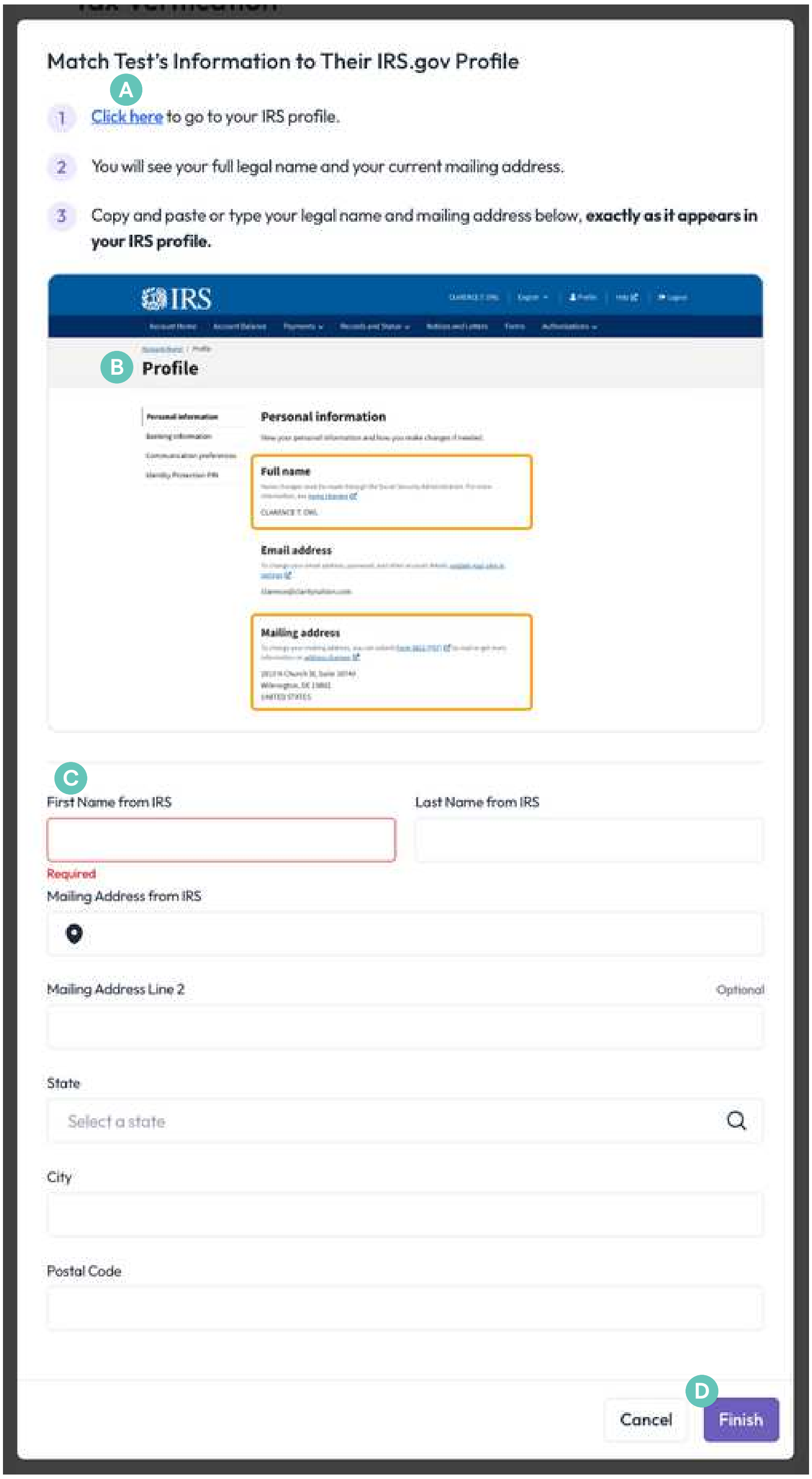


A If any guardians in the household do not have an IRS account, click this button to create one. (See pages 4-9 for step-by-step instructions on the creation process)

B Once created, or if you already have an IRS account, click the "Enter IRS Info" button to add your name and address. (See next page for more details)

C A confirmation box will pop-up to confirm that the guardian has an IRS account. Once you have an account, click the "Yes, Continue" button to proceed.

STEP 1 - CREATE/CONFIRM IRS ACCOUNT (CONT'D)



A Click the link to go straight to your IRS profile page.

B Refer to the screenshot to find where to locate your IRS name and address.

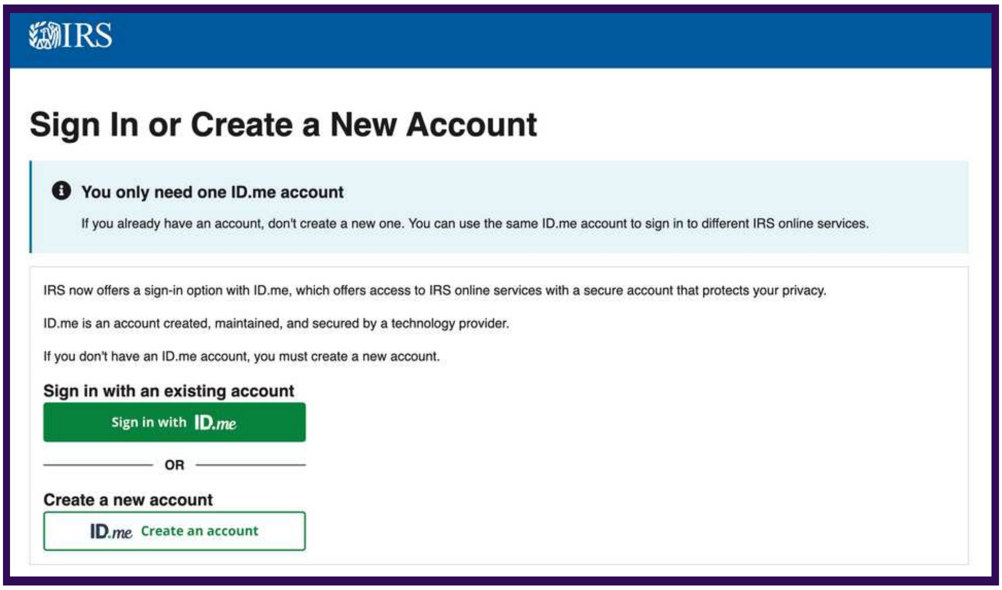
C Enter your name and address EXACTLY as it appears on your IRS profile

D Once everything is entered, click the Finish button to move to the next step

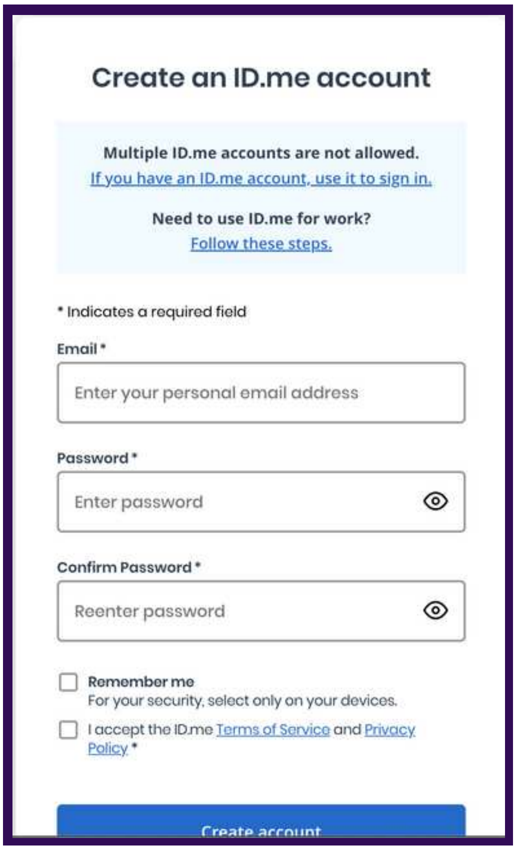
STEP 2 - IRS ACCOUNT CREATION

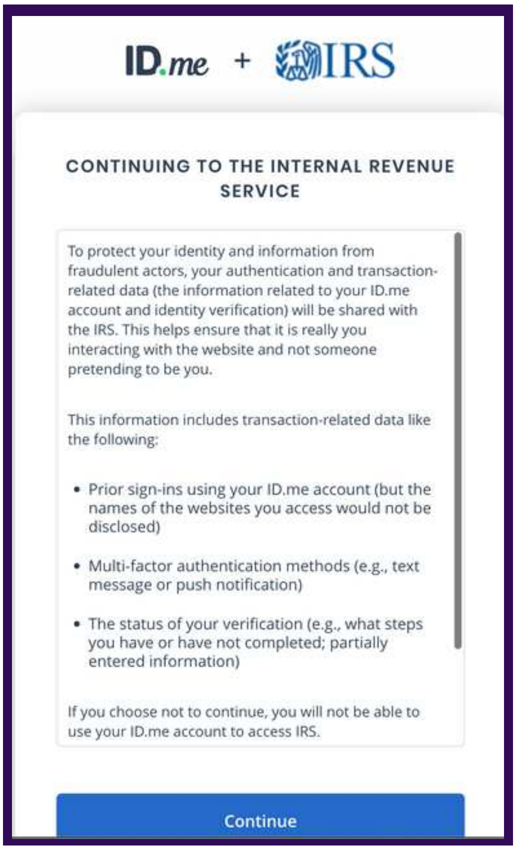
- If you already have an IRS account through ID.me, you do not need to complete these steps. Skip ahead to page 10 for the next steps in the Clarity process.
- These steps are completed outside of Clarity's scope. If you have any questions or encounter issues verifying your account, visit: [ID.me Support]

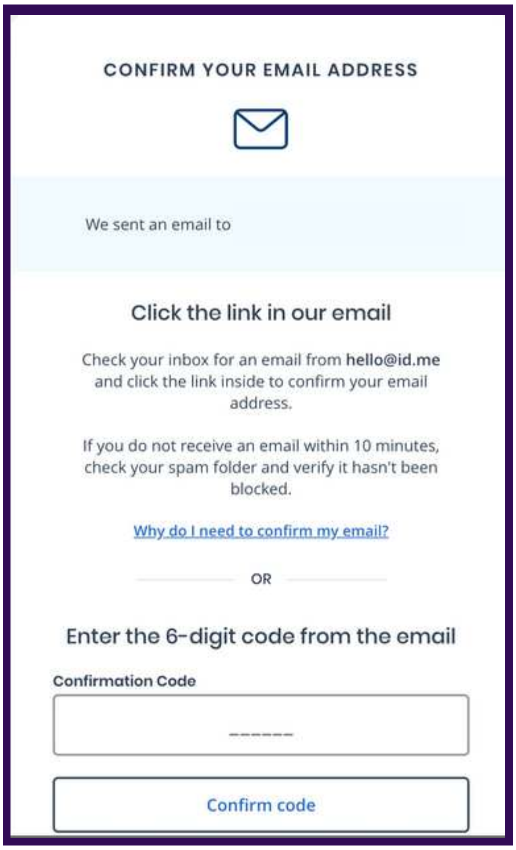
Click the Create an Account button to get started



Fill out your log-in information and follow the prompts to confirm your email.

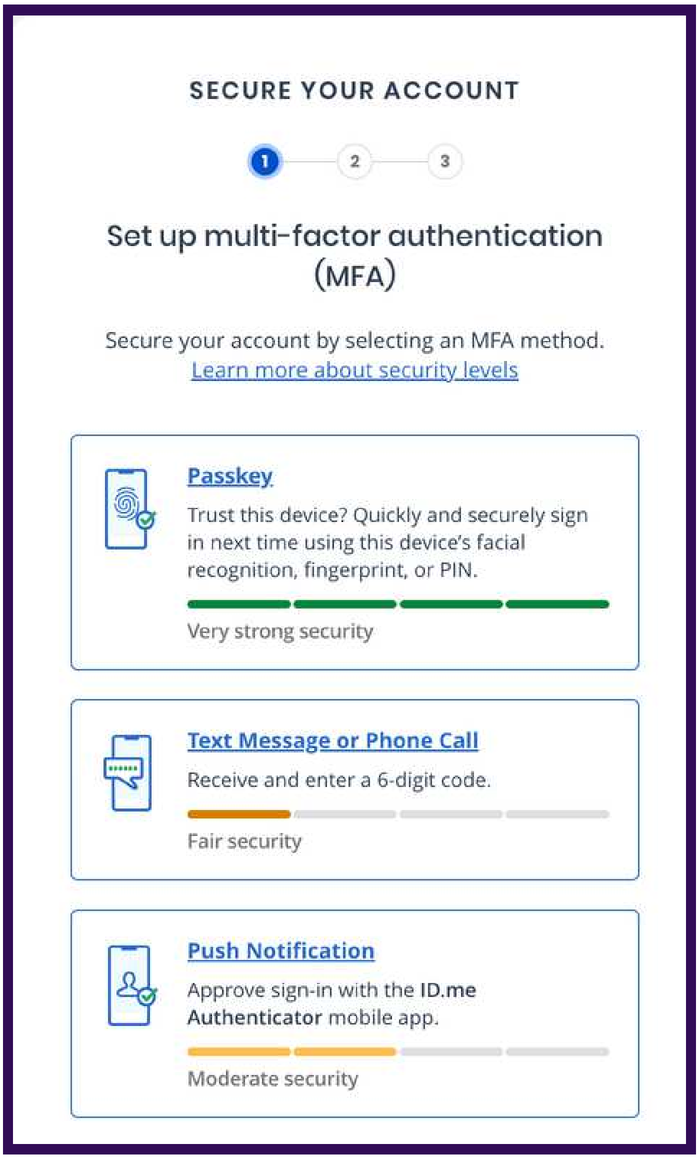


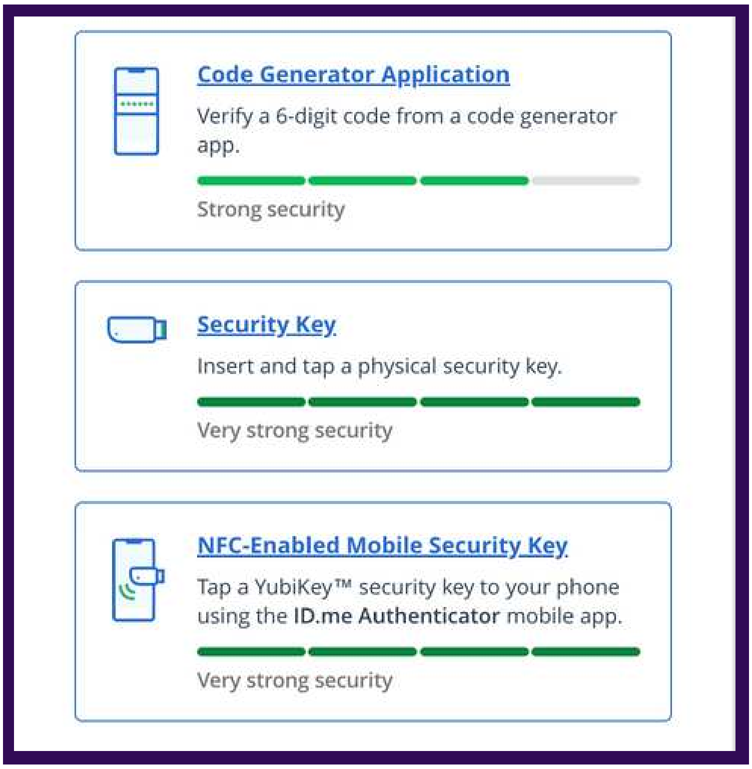




STEP 2 - IRS ACCOUNT CREATION (CONT'D)

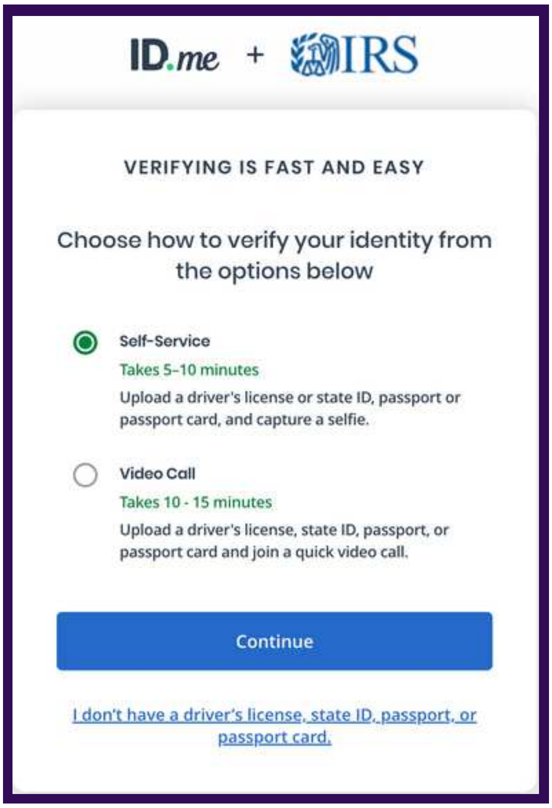
Once account has been created, you will need to set up multi-factor authentication. You can select whichever option works best for you.





STEP 3 - IRS ACCOUNT VERIFICATION

You will have the option to use Self-Service or a Video Call to verify your identity. If you select the Self-Service option, you will need to consent for ID.me to collect biometric data and sensitive personal information.



What information is being requested? Here is the explanation from the ID.me site:
note: for our purposes, it is very unlikely that fingerprint information will be requested

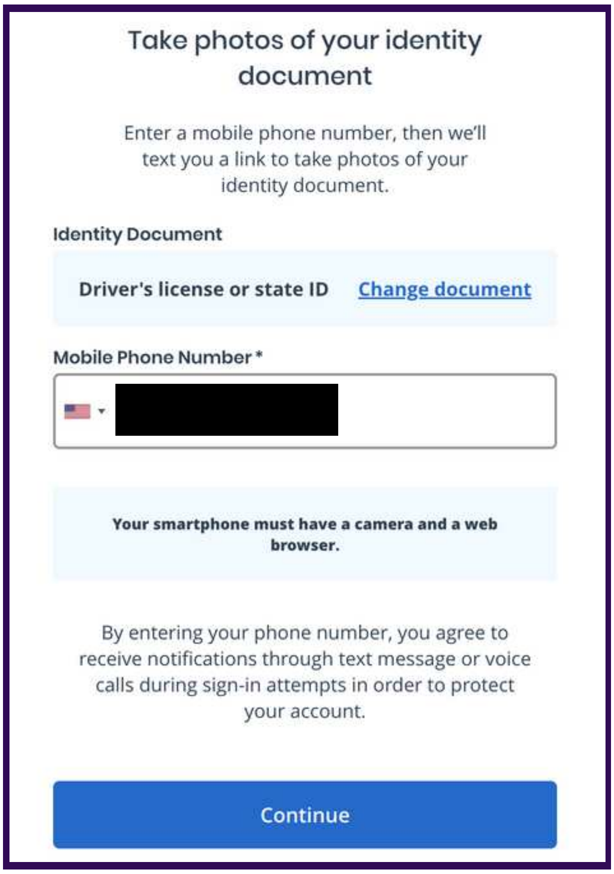
- Facial Biometrics: Our Service may require you to upload an image of your government issued or other identification document(s) as well as your photographic image or "selfie" photograph using your mobile or other device. We use these images to create or derive facial geometry or faceprint which we use for purposes of identity verification and to prevent the creation of multiple accounts in a fraudulent manner.
- Fingerprint Information: Our Service may require the submission of fingerprints, including fingerprint or hand scanning, which we use for purposes of identity verification and to prevent the creation of multiple accounts in a fraudulent manner.

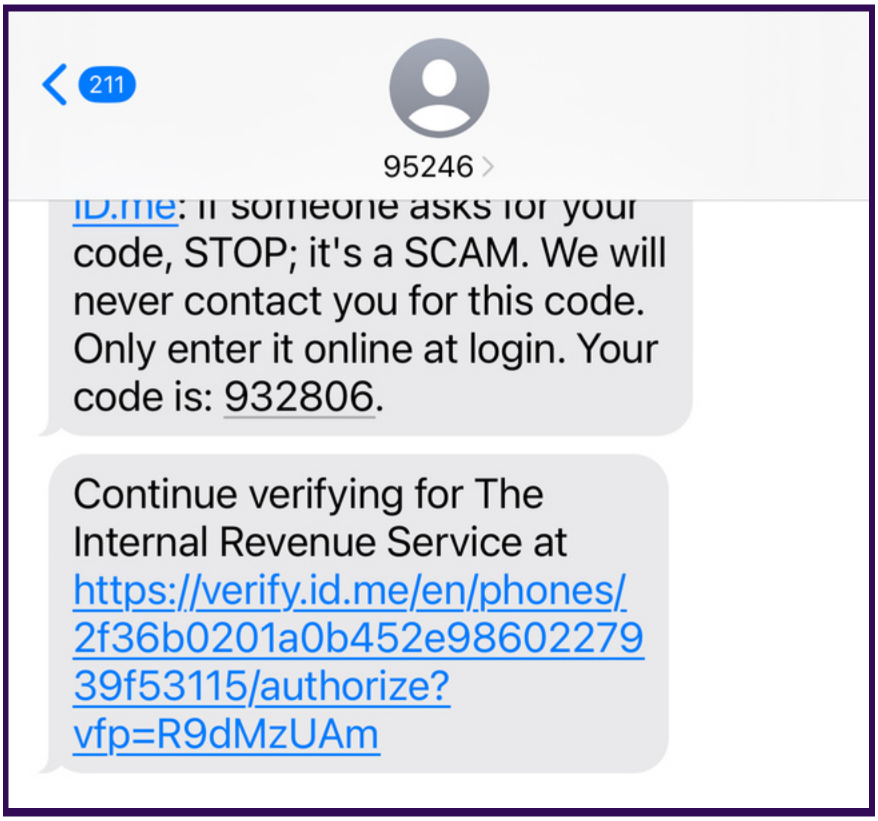
Clarity

STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Regardless of which verification method you choose, you will need to take photos of your identification document from your mobile device.

Enter your mobile phone number and then follow the link in the text message you receive.

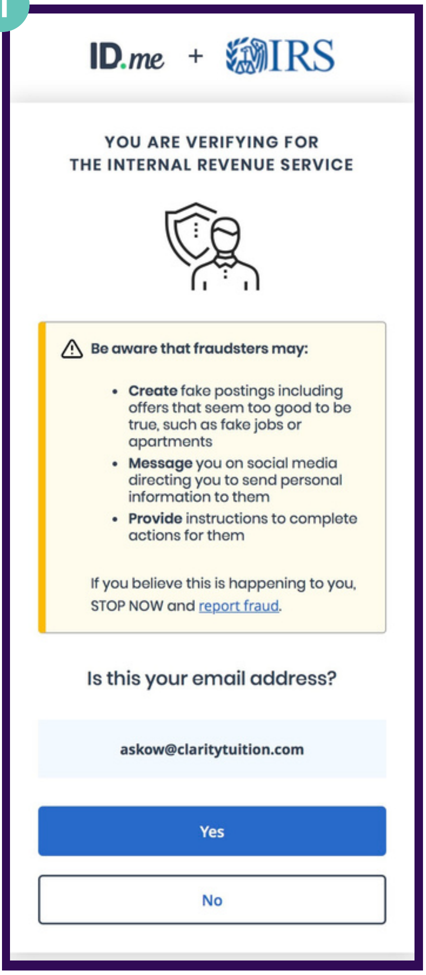




STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Follow the prompts to take photos of your identification.

1



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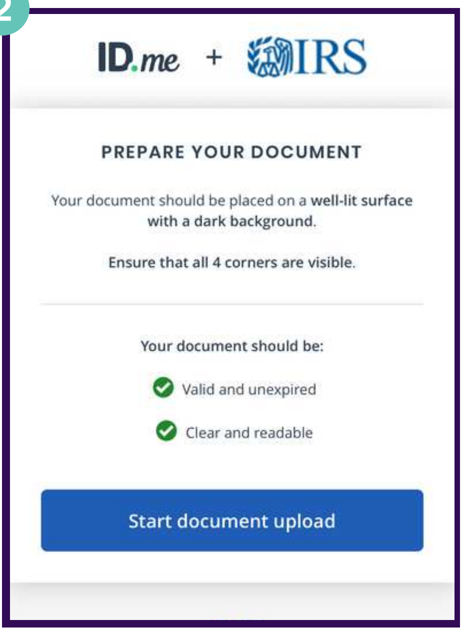

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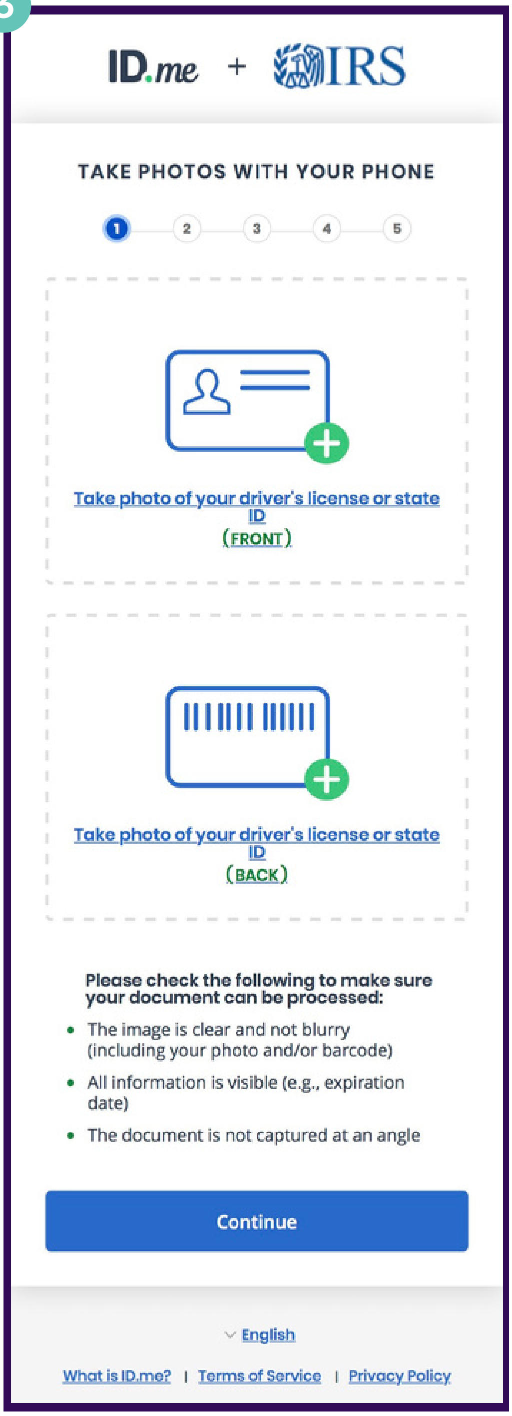
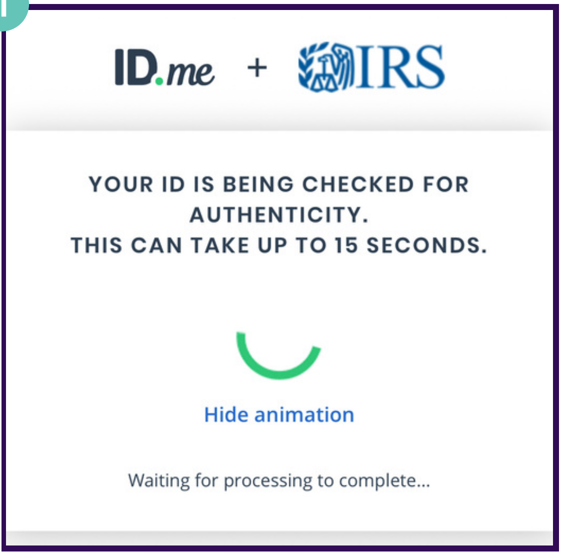


4

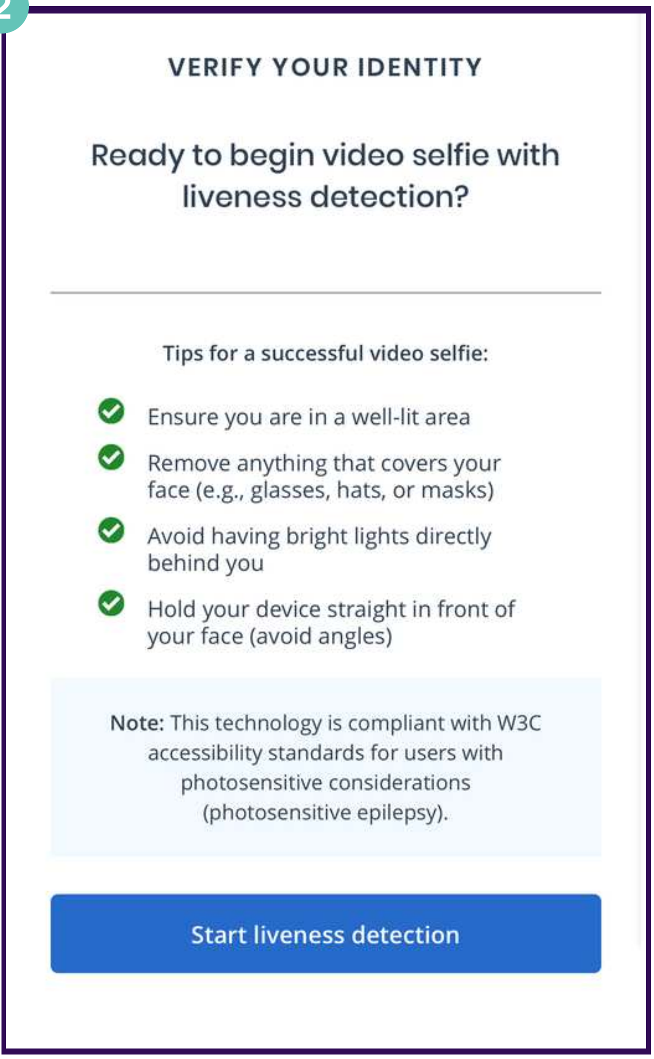
STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Follow the prompts to upload a selfie. Once completed, you can return to the Clarity application.

1



2



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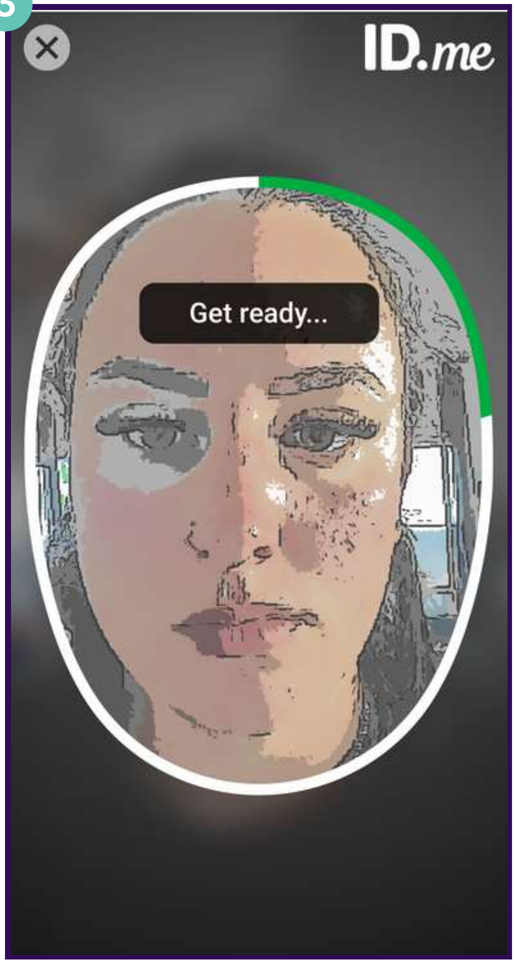

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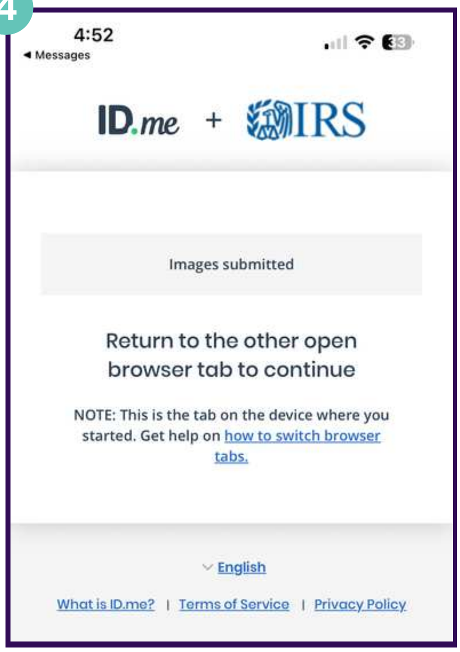
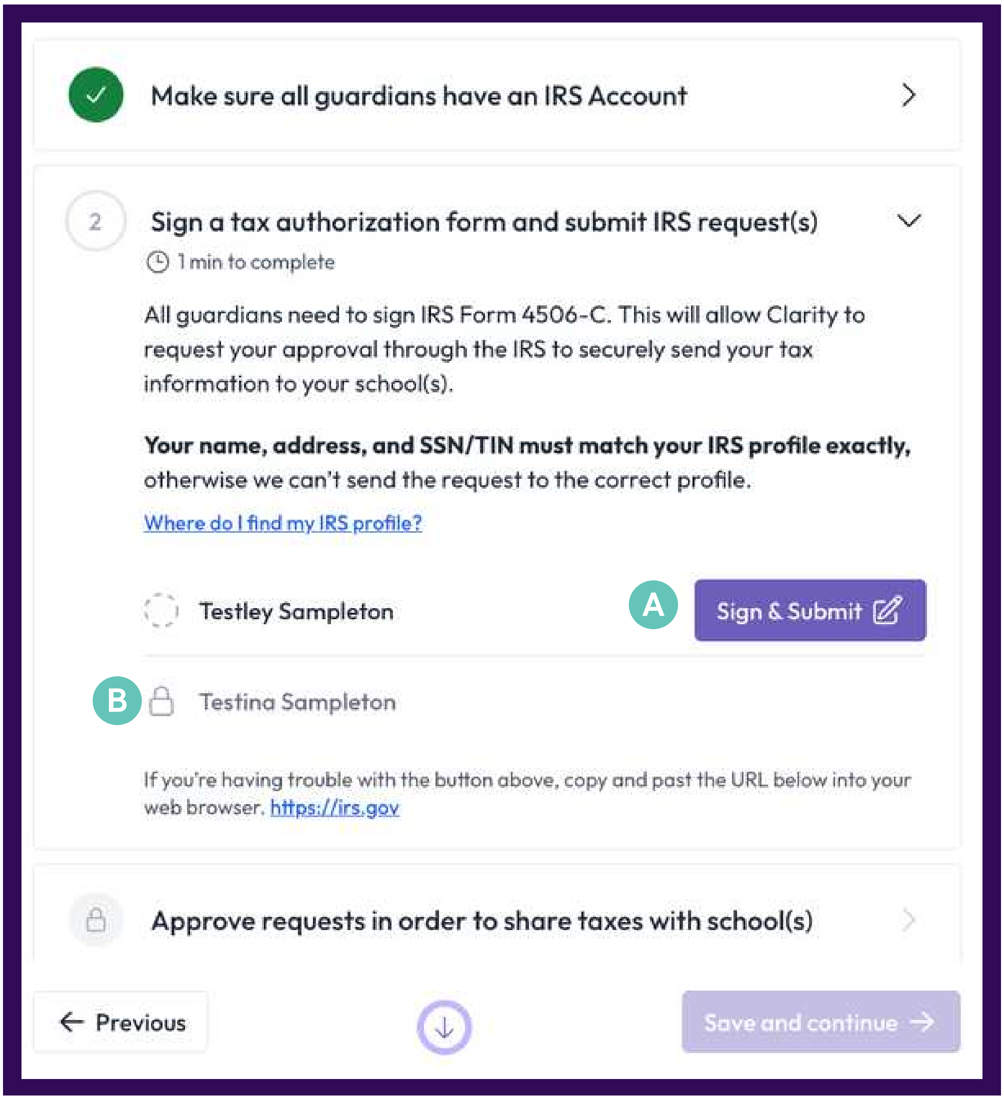


Tax Verification

STEP 4 - TAX VERIFICATION FORM

- Once all guardians have checked the box confirming that the have an IRS account, Step 2 will automatically open up for you to begin signing the form.
- Each guardian will complete a separate copy of the tax verification form, with forms submitted one at a time.



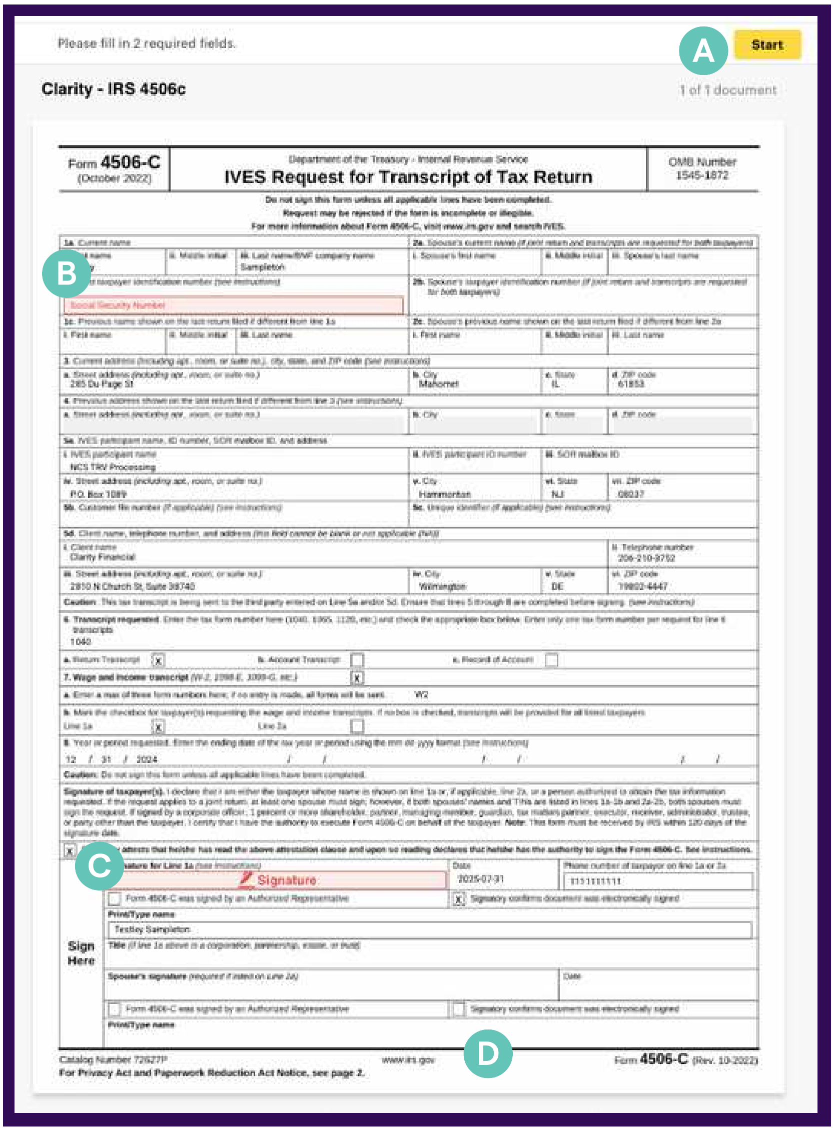
A The first, or only, guardian will click the Sign & Submit button to fill out the 4506-C tax verification form.

B If there is a second guardian, the Sign & Submit button will appear after the first guardian has signed the form. Repeat the same signing process for the second guardian

Tax Verification

STEP 4 - TAX VERIFICATION FORM (CONT'D)

- Clarity will automatically fill in most of the information on the form using the details you provided in your application.
- Double-check that the pre-filled information is correct. If any details are incorrect, return to the application and update them.



A Depending on the size of your browser window, the yellow buttons saying "Start, fill, next, and finish" will either appear next to the box that needs to be filled out, or at the bottom of the page. You can either click the buttons or just navigate and click directly on the box that needs to be filled out.

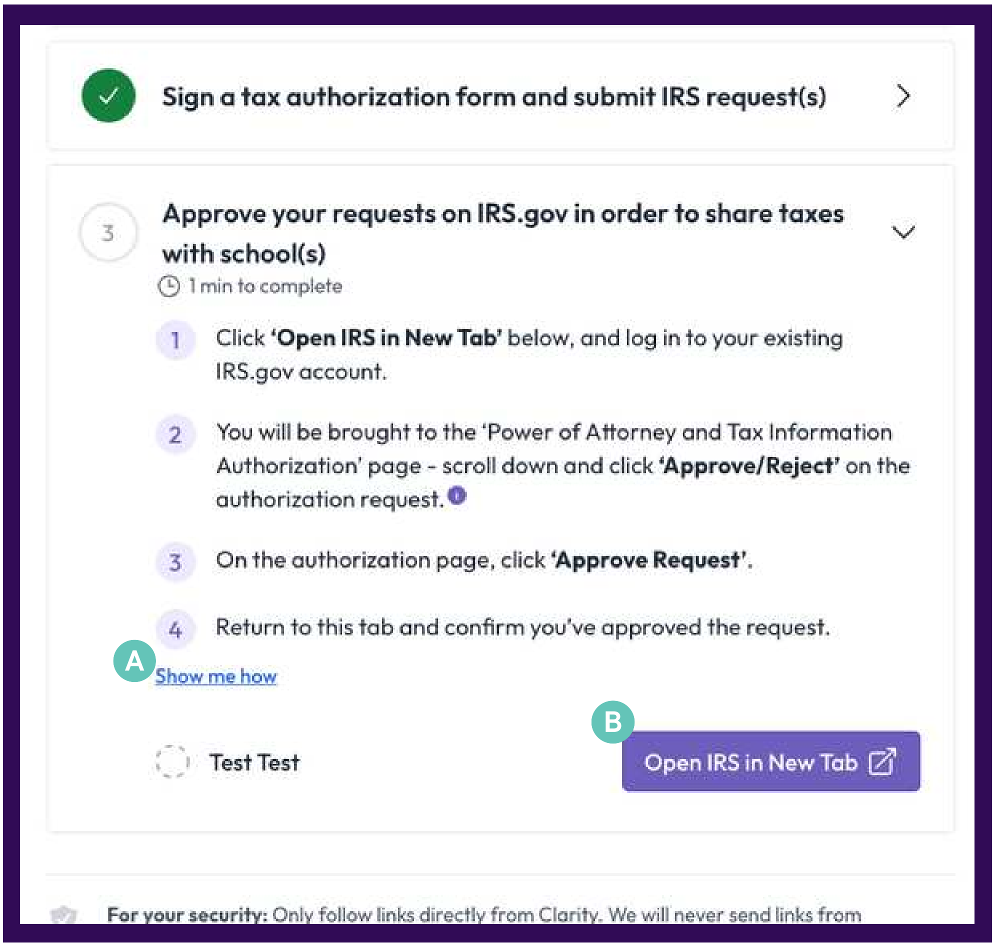
B Enter the guardian's social security number.

C Enter the guardian's signature. It will be a digital e-signature

D A prompt to Finish will appear at the bottom of the screen to finalize the signing.

STEP 5 - APPROVE DOCUMENT REQUESTS

- As with the other pages, each guardian will complete the process separately, logging in to their personal IRS account.



A The 'Show me how' link brings up a window providing the steps to take on the IRS website.

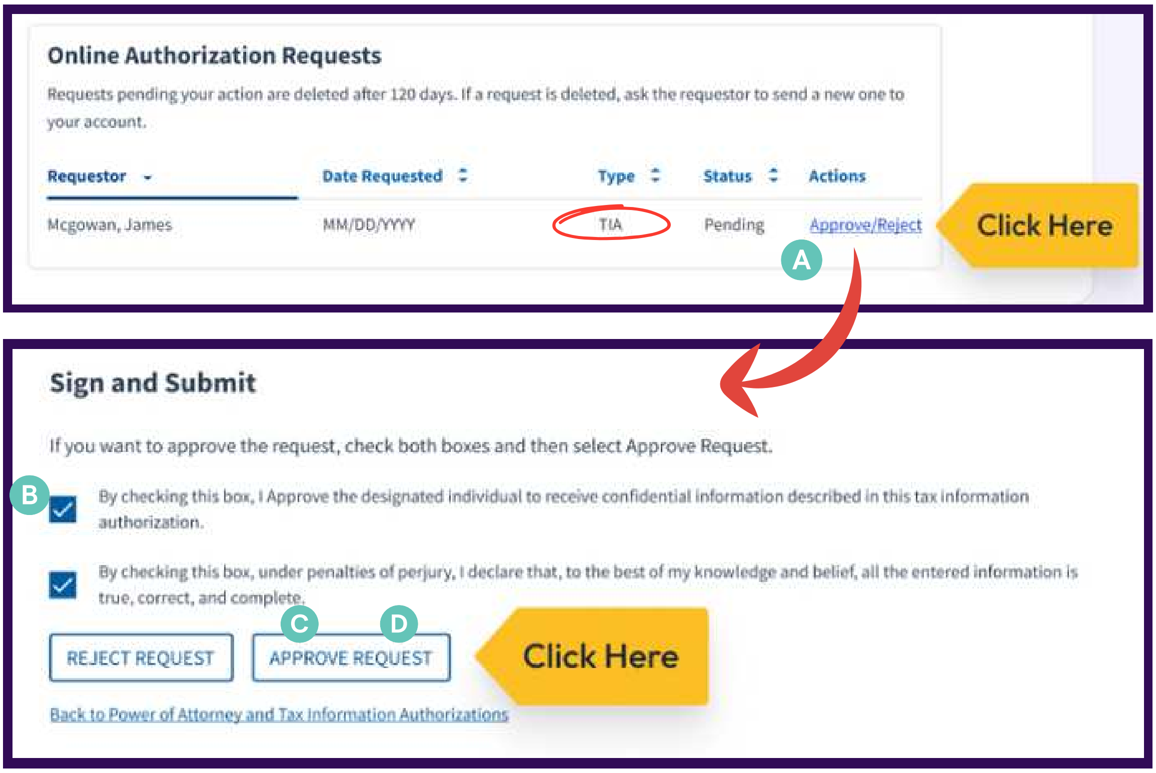
B Click "Open IRS in New Tab" to be taken to the IRS website. (See next page for the approval steps)

Tax Verification

STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

- Once you sign in to your account, you will automatically be taken to the authorization request page

*Note: the page on the IRS site is called "Power of Attorney and Tax Information Authorizations." You will be authorizing Clarity, through our IRS-designated representatives James McGowan or Curtis Knuth, to access your tax records. You are not being asked to authorize a power of attorney. You can verify this by looking for the "TIA" in the "Type" column of the Online Authorization Request box (see below)



A Click "Approve/Reject" to move to the approval step.

B Check both boxes to agree to the authorization.

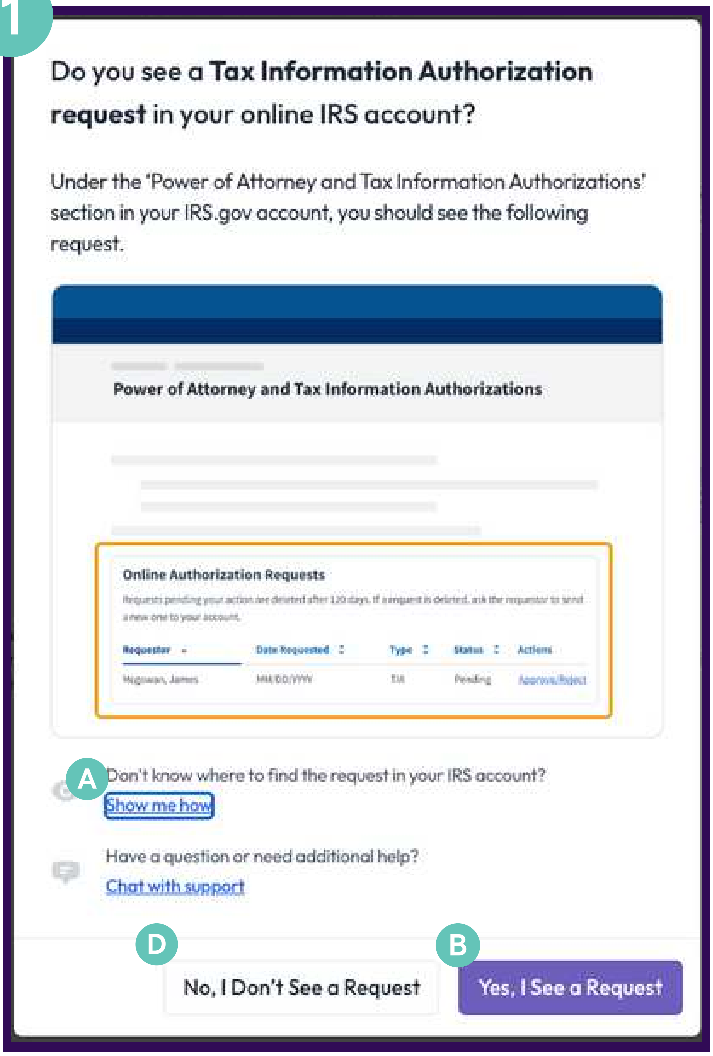
C Click Approve Request.

D Once request is approved, you can close the IRS page and continue your application (see next page)

STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

- After coming back to your application, you will see these pop-ups to confirm the authorization process on the IRS website.

1



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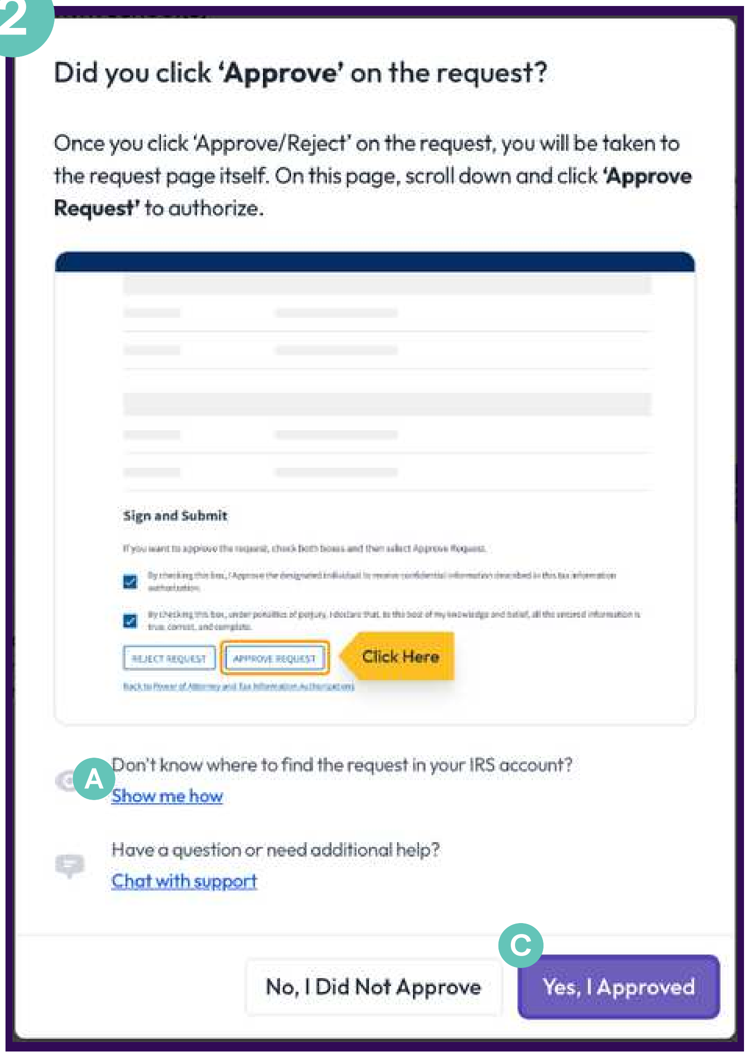


A The 'Show me how' link brings up a window providing the steps to take on the IRS website.

B If you saw the authorization request on your IRS account, click "Yes, I See a Request" to confirm

C On the next pop-up, if you approved the authorization, click the "Yes, I Approved" button to proceed.

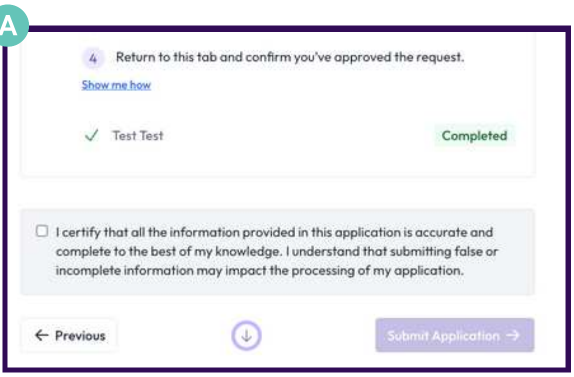
D If you are not seeing an authorization request, click "No, I Don't See a Request" and follow the process on the next page

Clarity

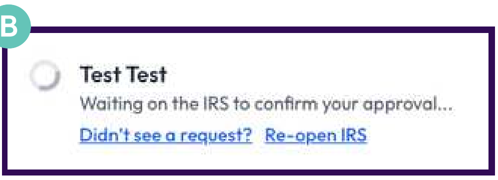
STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

If you saw and approved the request:

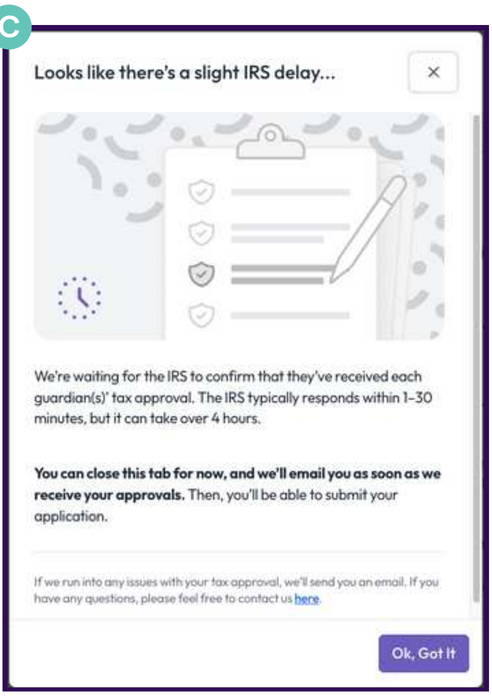
A



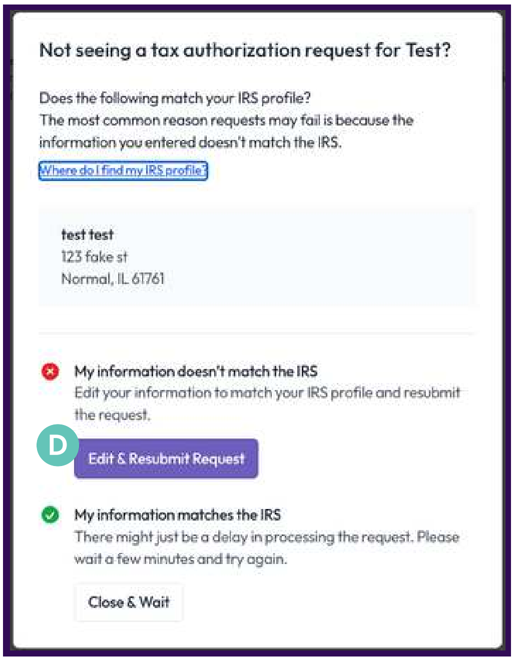
B



C



If you did not see the request:



D If you are not seeing an authorization request, follow the steps to confirm that your name and address match exactly what is on your IRS profile. Make any updates needed and then follow the steps on pages 12-13 again to approve

A Once you have approved the authorization, you should see a green checkmark next to all names. At this time, you can check the "I certify..." box and submit your application.

B While it can take less than 5-10 minutes for us to receive confirmation from the IRS, it does sometimes take several hours, even up to 24. You will see the spinning circle until confirmed. If it's been longer than 24 hours, reach out to Clarity support.

C After 10 minutes, you may see this box pop up. It is just a notification stating that it may take some time for us to receive the confirmation and to check back later.

Questions? You can view/download the Tax Verification FAQs PDF on the [Tax Verification help page]