

Tax Verification Guide

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

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

STEP 1 - CREATE/CONFIRM IRS ACCOUNT

- Each guardian will need to create their own individual IRS account.
- If you already have an account, simply check the box to confirm and skip to page 9 of this guide.

Tax Verification

[Why does Clarity need this information?](#)

1 Make sure all guardians have an IRS Account ▼

1-10 mins to complete

All guardians need an IRS account so Clarity can securely request your approval through that account to share your taxes with school(s).

A

Test Sampleton has an IRS account

B _____

Testa Sampleton has an IRS account

Sign a tax authorization form and submit IRS request(s) >

Approve requests in order to share taxes with school(s) >

Previous ↓ >

A If any guardians in the household do not have an IRS account, click this button to create one. (See pages 3-8 for step-by-step instructions on the creation process)

B Once created, or if you already have an IRS account, check the box to confirm and skip to page 9 of this guide.

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 9 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

The screenshot shows the IRS website's sign-in page. At the top is the IRS logo. Below it is the heading "Sign In or Create a New Account". A light blue information box states: "You only need one ID.me account. If you already have an account, don't create a new one. You can use the same ID.me account to sign in to different IRS online services." Below this, text explains that IRS offers a sign-in option with ID.me and that ID.me is a secure account. It then provides two options: "Sign in with an existing account" with a green "Sign in with ID.me" button, and "Create a new account" with a green "ID.me Create an account" button. An "OR" separator is between the two options.

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

The first screenshot, titled "Create an ID.me account", shows a form with fields for "Email*", "Password*", and "Confirm Password*". A note states "Multiple ID.me accounts are not allowed." and provides a link to sign in if the user already has an account. There are checkboxes for "Remember me" and "I accept the ID.me Terms of Service and Privacy Policy*". A blue "Create account" button is at the bottom.

The second screenshot, titled "CONTINUING TO THE INTERNAL REVENUE SERVICE", features the ID.me + IRS logo. It explains that to protect identity, authentication and transaction-related data will be shared with the IRS. It lists the types of information shared: prior sign-ins, multi-factor authentication methods, and verification status. A blue "Continue" button is at the bottom.

The third screenshot, titled "CONFIRM YOUR EMAIL ADDRESS", shows an envelope icon and states "We sent an email to". It instructs the user to "Click the link in our email" and check their inbox for an email from hello@id.me. It also provides a link "Why do I need to confirm my email?". Below this is an "OR" separator and a prompt to "Enter the 6-digit code from the email". A "Confirmation Code" field with a masked input and a blue "Confirm code" button are at the bottom.

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.



SECURE YOUR ACCOUNT







Set up multi-factor authentication (MFA)



Secure your account by selecting an MFA method. [Learn more about security levels](#)



 **Passkey**
Trust this device? Quickly and securely sign in next time using this device's facial recognition, fingerprint, or PIN.

Very strong security

 **Text Message or Phone Call**
Receive and enter a 6-digit code.

Fair security

 **Push Notification**
Approve sign-in with the ID.me Authenticator mobile app.

Moderate security

 **Code Generator Application**
Verify a 6-digit code from a code generator app.

Strong security

 **Security Key**
Insert and tap a physical security key.

Very strong security

 **NFC-Enabled Mobile Security Key**
Tap a YubiKey™ security key to your phone using the ID.me Authenticator mobile app.

Very strong security

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.

Consent for ID.me to collect Biometric Data and Sensitive Personal Information

CONSENT FOR ID.ME TO COLLECT BIOMETRIC INFORMATION AND SENSITIVE PERSONAL INFORMATION

In the event of any discrepancy between a non-English version of this document and the English version of this document, the English version shall prevail in all respects.

BIOMETRIC INFORMATION PRIVACY STATEMENT

ID.me will not sell, rent, or trade your Biometric Information, and after verification you may request we delete your Biometric Information. Your Biometric Information will only be used by ID.me to verify your identity in accordance with the guidelines published by the National Institute for Standards and Technology or as required for the prevention of fraud. ID.me will transfer your Biometric Information to our third party partners only when required by a subpoena, warrant, or other court ordered legal action.

Notice and Consent

This Notice and Consent for the collection of Biometric Information, Personal Information and Sensitive Personal Information ("Consent") describes how ID.me

— I acknowledge that I have received, read, and agreed

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.

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.

Take photos of your identity document

Enter a mobile phone number, then we'll text you a link to take photos of your identity document.

Identity Document

Driver's license or state ID [Change document](#)

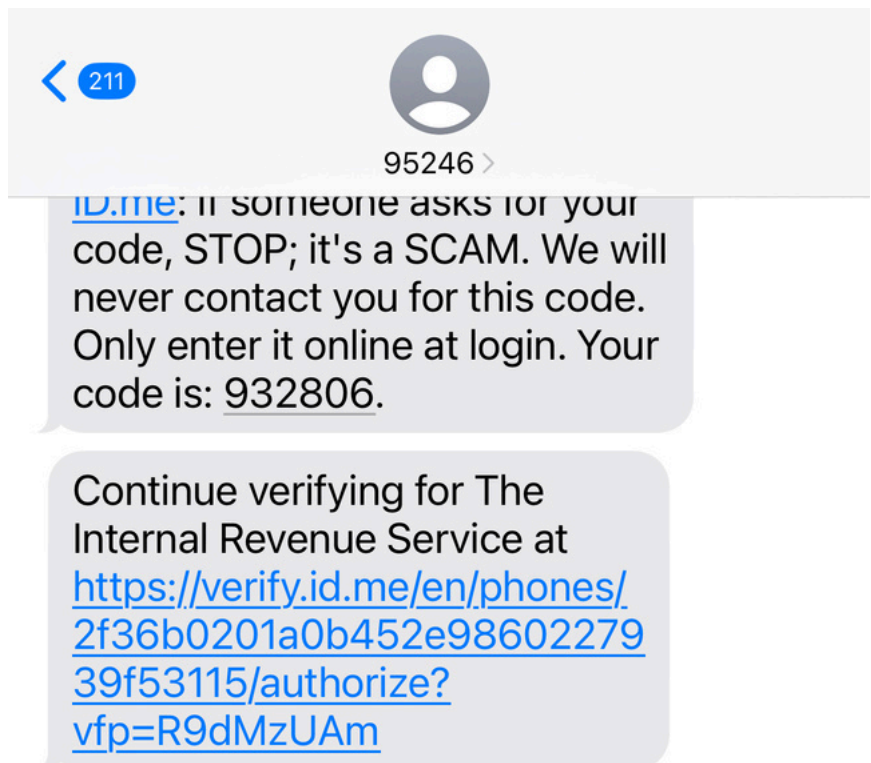
Mobile Phone Number *



Your smartphone must have a camera and a web browser.

By entering your phone number, you agree to receive notifications through text message or voice calls during sign-in attempts in order to protect your account.

Continue



STEP 3 - IRS ACCOUNT VERIFICATION (CONT'D)

Follow the prompts to take photos of your identification.

1 ID.me + IRS

YOU ARE VERIFYING FOR
THE INTERNAL REVENUE SERVICE



⚠ Be aware that fraudsters may:

- Create fake postings including offers that seem too good to be true, such as fake jobs or apartments
- Message you on social media directing you to send personal information to them
- Provide instructions to complete actions for them

If you believe this is happening to you, STOP NOW and [report fraud](#).

Is this your email address?

askow@claritytuition.com

Yes

No

2

ID.me + IRS

PREPARE YOUR DOCUMENT

Your document should be placed on a well-lit surface with a dark background.

Ensure that all 4 corners are visible.

Your document should be:

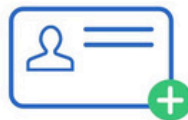
- ✓ Valid and unexpired
- ✓ Clear and readable

Start document upload

3 ID.me + IRS

TAKE PHOTOS WITH YOUR PHONE

1 2 3 4 5



Take photo of your driver's license or state ID
(FRONT)



Take photo of your driver's license or state ID
(BACK)

Please check the following to make sure your document can be processed:

- The image is clear and not blurry (including your photo and/or barcode)
- All information is visible (e.g., expiration date)
- The document is not captured at an angle

Continue

English

[What is ID.me?](#) | [Terms of Service](#) | [Privacy Policy](#)

4 TAKE PHOTOS WITH YOUR PHONE

1 2 3 4 5



Take a different photo (front)



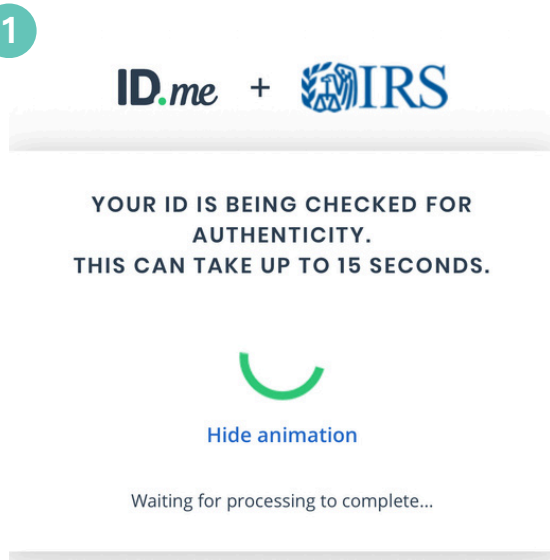
Take a different photo (back)

Submit your photos

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

VERIFY YOUR IDENTITY

Ready to begin video selfie with liveness detection?

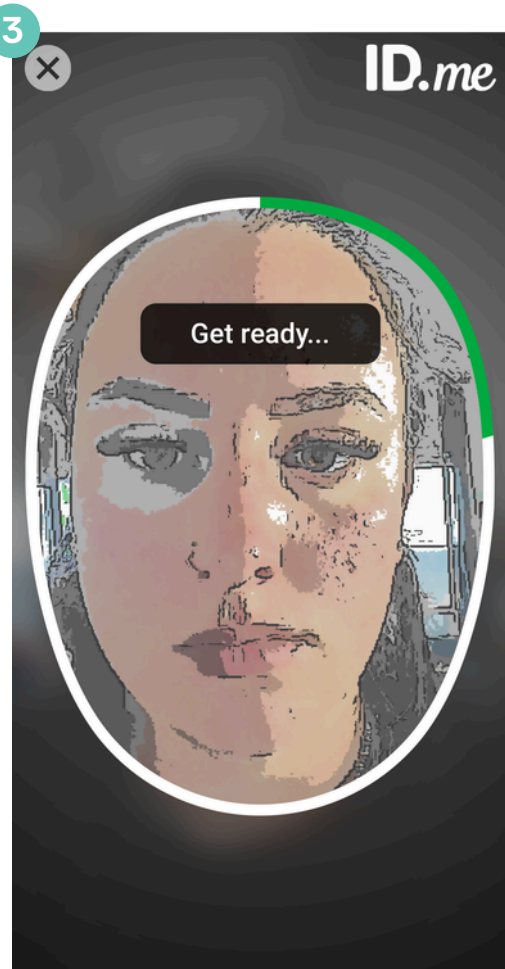
Tips for a successful video selfie:

- ✓ Ensure you are in a well-lit area
- ✓ Remove anything that covers your face (e.g., glasses, hats, or masks)
- ✓ Avoid having bright lights directly behind you
- ✓ Hold your device straight in front of your face (avoid angles)

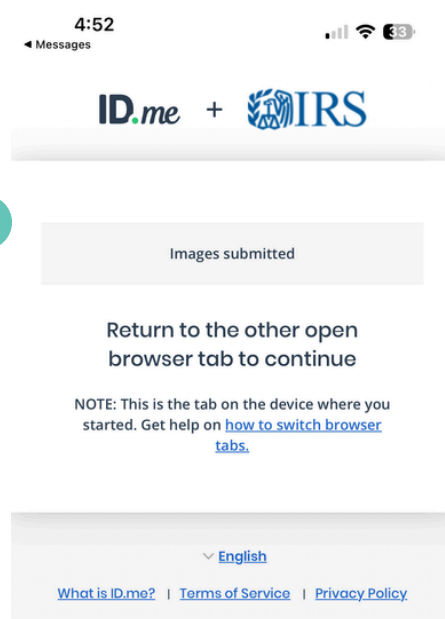
Note: This technology is compliant with W3C accessibility standards for users with photosensitive considerations (photosensitive epilepsy).

Start liveness detection

3



4



STEP 4 - TAX VERIFICATION FORM

- Once all guardians have checked the box confirming that they 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.

Make sure all guardians have an IRS Account

2 Sign a tax authorization form and submit IRS request(s) 1 min to complete

All guardians need to sign IRS Form 4506-C. This will allow Clarity to request your approval through the IRS to securely send your tax information to your school(s).

Your name, address, and SSN/TIN must match your IRS profile exactly, otherwise we can't send the request to the correct profile.

[Where do I find my IRS profile?](#)

Testley Sampleton **A** Sign & Submit

B Testina Sampleton

If you're having trouble with the button above, copy and past the URL below into your web browser. <https://irs.gov>

Approve requests in order to share taxes with school(s)

← Previous ↓ Save and continue →

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

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.

Please fill in 2 required fields. A Start

Clarity - IRS 4506c 1 of 1 document

Form 4506-C (October 2022)		Department of the Treasury - Internal Revenue Service IVES Request for Transcript of Tax Return		OMB Number 1545-1872	
Do not sign this form unless all applicable lines have been completed. Request may be rejected if the form is incomplete or illegible. For more information about Form 4506-C, visit www.irs.gov and search IVES.					
1a. Current name I. Name II. Middle initial III. Last name/BMF company name Sampleton		2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers) I. Spouse's first name II. Middle initial III. Spouse's last name			
1b. Taxpayer identification number (see instructions) Social Security Number		2b. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers)			
3a. Previous name shown on the last return filed if different from line 1a I. First name II. Middle initial III. Last name		3b. Spouse's previous name shown on the last return filed if different from line 2a I. First name II. Middle initial III. Last name			
3. Current address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)					
a. Street address (including apt., room, or suite no.) 2810 N Church St		b. City Wilmington		c. State IL	
d. ZIP code 61853					
4. Previous address shown on the last return filed if different from line 3 (see instructions)					
a. Street address (including apt., room, or suite no.)		b. City		c. State	
d. ZIP code					
5a. IVES participant name, ID number, SCR mailbox ID, and address					
i. IVES participant name NCS TRV Processing		ii. IVES participant ID number		iii. SCR mailbox ID	
iv. Street address (including apt., room, or suite no.) P.O. Box 1089		v. City Hamorton		vi. State NJ	
vii. ZIP code 08037		viii. Unique identifier (if applicable) (see instructions)			
5d. Client name, telephone number, and address (this field cannot be blank or not applicable (N/A))					
i. Client name Clarity Financial		ii. Telephone number 206-210-9752			
iii. Street address (including apt., room, or suite no.) 2810 N Church St, Suite 38740		iv. City Wilmington		v. State DE	
vi. ZIP code 19802-4447					
Caution: This tax transcript is being sent to the third party entered on Line 5a and/or 5d. Ensure that lines 5 through 8 are completed before signing. (see instructions)					
6. Transcript requested. Enter the tax form number here (1040, 1095, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request for line 6 transcripts (1040).					
a. Return Transcript <input checked="" type="checkbox"/>		b. Account Transcript <input type="checkbox"/>		c. Record of Account <input type="checkbox"/>	
7. Wage and income transcript (W-2, 1099-E, 1099-C, etc.) <input checked="" type="checkbox"/> W2					
a. Enter a max of three form numbers here; if no entry is made, all forms will be sent.					
b. Mark the checkbox for taxpayer(s) requesting the wage and income transcripts. If no box is checked, transcripts will be provided for all listed taxpayers					
Line 1a <input checked="" type="checkbox"/>		Line 2a <input type="checkbox"/>			
8. Year or period requested. Enter the ending date of the tax year or period using the mm dd yyyy format (see instructions)					
12 / 31 / 2024					
Caution: Do not sign this form unless all applicable lines have been completed.					
Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or, if applicable, line 2a, or a person authorized to obtain the tax information requested; if the request applies to a joint return, at least one spouse must sign; however, if both spouses' names and TINs are listed in lines 1a-1b and 2a-2b, both spouses must sign the request. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-C on behalf of the taxpayer. Note: This form must be received by IRS within 120 days of the signature date.					
<input checked="" type="checkbox"/> I, <u>Testley Sampleton</u> , attest that he/she has read the above attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-C. See Instructions, where for Line 1a (see instructions)		Date 2025-07-31		Phone number of taxpayer on line 1a or 2a 1111111111	
Signature <u>Testley Sampleton</u>		<input checked="" type="checkbox"/> Signatory confirms document was electronically signed			
Sign Here					
Print/Type name Testley Sampleton		Title (if line 1a above is a corporation, partnership, estate, or trust)			
Spouse's signature (required if listed on Line 2a)		Date			
<input type="checkbox"/> Form 4506-C was signed by an Authorized Representative		<input type="checkbox"/> Signatory confirms document was electronically signed			
Print/Type name					

Catalog Number 72627P www.irs.gov Form **4506-C** (Rev. 10-2022)

For Privacy Act and Paperwork Reduction Act Notice, see page 2. D

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.

1

Sign a tax authorization form and submit IRS request(s) >

3 Approve requests in order to share taxes with school(s) ✓
⌚ 1 min to complete

- 1 Click **'Approve'** below, and log in to your existing IRS account.
- 2 You will be brought to the 'Power of Attorney and Tax Information Authorization' page - scroll down and click **'Approve/Reject'** on the authorization request.
- 3 On the authorization page, click **'Approve Request'**. We will now be able to share your taxes with school(s) once you submit your application.

A [Show me how](#)

✓ Testley Sampleton **E Completed**

○ Testina Sampleton **B Approve**

← Previous ⌵ **F Save and continue** →

2

Did you approve the IRS tax request?

Let us know if you were able to see and approve the tax request in your IRS account. If not, we can help.

[Show me how](#)
[Chat with support](#)

C I Approved the Request

D I Don't See a Request

3

Not seeing a tax authorization request for Adam?

Does the following match your IRS profile?
The most common reason requests may fail is because the information you entered doesn't match the IRS.

[Where do I find my IRS profile?](#)

Adam Meredith
123 Clarity Ave
Chicago, IL 60652

✖ My information doesn't match the IRS
Edit your information to match your IRS profile and resubmit the request.
Edit & Resubmit Request

✔ My information matches the IRS
There might just be a delay in processing the request. Please wait a few minutes and try again.
Close & Wait

A

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

B

Click Approve to be taken to the IRS website, which will open in a new tab/window. (See next page for the approval steps)

E

After authorizing the request, it will show as 'Completed' for that guardian.

F

Once all guardians have completed the request authorization, click Save and continue to move forward in the application.

C

Back on the Clarity page, click "I Approved the Request" if you were able to do so.

D

If you are not seeing an authorization request, click on "I Don't See a Request" and follow the process shown in step 3

STEP 5 - APPROVE DOCUMENT REQUESTS (CONT'D)

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

Online Authorization Requests

Requests pending your action are deleted after 120 days. If a request is deleted, ask the requestor to send a new one to your account.

Requestor	Date Requested	Type	Status	Actions
Mcgowan, James	MM/DD/YYYY	TIA	Pending	Approve/Reject

Click Here

Sign and Submit

If you want to approve the request, check both boxes and then select Approve Request.

- By checking this box, I Approve the designated individual to receive confidential information described in this tax information authorization.
- By checking this box, under penalties of perjury, I declare that, to the best of my knowledge and belief, all the entered information is true, correct, and complete.

Click Here

[Back to Power of Attorney and Tax Information Authorizations](#)

A

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 (step 2 on page 11)