

FREQUENTLY ASKED QUESTIONS

Why are we doing this process?

To get a full picture of your family's financial situation, schools need to review your tax transcripts as part of the application process.

When you complete the verification page in your Clarity application, you're authorizing Clarity to securely retrieve your tax transcripts directly from the IRS. This means you won't need to manually upload any documents.

As part of this process, you'll go through ID.me, a trusted and secure platform used by government agencies and organizations to verify your identity online. This ensures that it's really you requesting access to sensitive information, such as your IRS records. This extra layer of security protects your personal data and helps prevent identity theft or fraud.

I'm concerned about biometrics and data collection.

That's completely understandable!

When ID.me mentions "biometrics," they're referring specifically to the photo of your government-issued ID and the selfie you take during the verification process. ID.me uses these images to create a facial geometry profile, which helps confirm that you are the same person shown on your ID—even if the ID photo is a few years old.

This is a secure, standard method designed to protect your identity and ensure that no one else can access your sensitive information.

For more details, you can refer to page 5 of this guide to see exactly what ID.me/IRS is requesting.

Who is James McGowan?

Tax Authorization Requests require an IRS credentialed designee on file as a liable party. James is our designated IRS practitioner, so his name is the one that displays.

I'm getting stuck in the IRS verification process, who should I contact for help?

If you are having issues on the IRS website with the verification process, you can reach out to ID.me support here: https://help.id.me/hc/en-us/p/contact_support

We have noticed that some families experience issues completing verification because they already have an ID.me account, and the IRS will not allow them to create a duplicate. It is worth double checking that you don't have an active account, as their system doesn't confirm that information while you are going through the process.

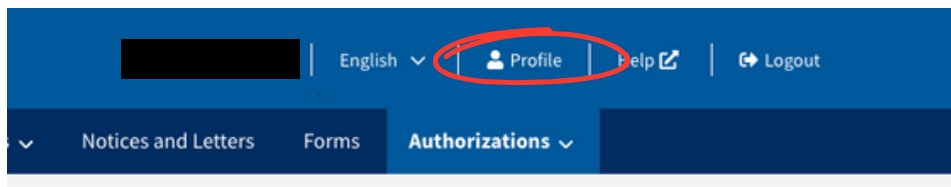
FREQUENTLY ASKED QUESTIONS (CONT'D)

I am not seeing an authorization request when I log in to my IRS account

If no authorizations appear on your IRS account, there may be a mismatch in your profile information. Verify that your IRS profile name and address match exactly with what's entered in your Clarity application. If there's a mismatch, update your Clarity application and try again. If everything matches, contact Clarity support for further assistance.

Checking your IRS Profile:

If currently logged in to your IRS account, you can access your account by clicking Profile at the top of the IRS page (see image). Otherwise, you can log in via this link to be taken there directly: <https://sa.www4.irs.gov/ola/profile/personal>



Updating your Name:

Open your Clarity application, go to Step 1: People, and navigate to the Guardians page. Update the first and/or last name as needed so it matches exactly with your name in your IRS profile.

A screenshot of a form titled 'Jane Doe' with a trash icon in the top right. Below the name is the section '1. Basic Information'. It contains two input fields: 'Legal First Name' with the value 'Jane' and 'Legal Last Name' with the value 'Doe'.

Updating your Address:

In Step 1: People, open the Address page. For the last question, "Did you file taxes at a different address?", select Yes and enter your IRS mailing address exactly as it appears in your profile.

A screenshot of a question: "Did you most recently file taxes at a different address?" with an information icon. Below the question are two radio button options: "Yes" (which is selected) and "No".

FREQUENTLY ASKED QUESTIONS (CONT'D)

I updated the address on my Clarity account, but still not seeing the authorization on the IRS website.

While the process is usually instant, it can occasionally take up to 5 minutes for the authorization request to appear. If you don't see it right away, wait up to 30 minutes to be safe. If it's still not showing after that, please contact Clarity support for further assistance.

I authorized the request through the IRS website, but the status on Clarity's verification page hasn't changed to 'completed'.

While the process usually takes 10-15 minutes, it can sometimes take up to 24 hours for Clarity to receive everything. If we do not receive the transcripts within a few minutes, you will be prompted to check back later. If you have been waiting longer than 24 hours for Clarity to receive your transcripts after completing the authorization approval on the IRS website, please contact the Clarity support team.