

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 authorize Clarity to securely retrieve your tax transcripts directly from the IRS, you won't need to manually upload any documents.

As part of the Clarity application process, you'll be able to choose how you want to authorize the sharing of your taxes. You can:

1. Complete the tax authorization through Clarity (3-5 days verification time, except during tax season in January/February, when verification time averages 5-7 days); or
2. Complete the tax authorization through [IRS.gov](https://www.irs.gov) (about 24 hours verification time)

Both pathways require you to verify your identity, which means uploading some form of ID and taking a photo of yourself to prove you are who you say you are. This extra layer of security protects your personal data and helps prevent identity theft or fraud.

Completing the tax authorization within Clarity will return your tax information to the school(s) of your choice in 3-5 days (5-7 days in January/February). Completing through [IRS.gov](https://www.irs.gov) will return your tax information to the school(s) of your choice about 24 hours. Accessing your IRS account will require you to go through ID.me, a secure platform used by government agencies and organizations to verify your identity online.

I'm concerned about biometrics and data collection.

That's completely understandable!

"Biometrics" refers 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 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. The Clarity identity verification process uses similar technology to ensure your personal data is protected.

What form(s) of ID are accepted for the identity verification?

Acceptable forms of ID are a valid driver's license, state ID, passport, or passport card.

Who are James McGowan, Elizabeth Boonin, and Curtis Knuth?

Tax Authorization Requests require an IRS credentialed designee on file as a liable party. James, Elizabeth, and Curtis are our designated IRS practitioners, so one of their names will be the one displayed on the form.

Why does Clarity request multiple years of tax information?

Form 8821 allows Clarity to securely access your tax transcripts from the IRS, not just for this year, but for the next three years as well. This means:

- You only need to complete this form once
- Your school can verify your financial information for future applications
- You won't need to reauthorize each year, saving time in your future application

Questions on Completing the Identity Verification through Clarity

What is Form 8821 and why do I need to sign it?

Form 8821 allows Clarity to securely access your tax transcripts from the IRS. It's a required part of the application and helps your school verify your financial information quickly and accurately.

Is Persona verification required?

Yes. All families must complete identity verification through Persona as part of the Form 8821 process. It's quick, secure and only needs to be done once.

What if I have trouble verifying my identity with Persona?

If your verification fails or times out, you'll be given a chance to retry. If issues persist, reach out to support and we'll help take a look.

How long does it take to process Form 8821?

Processing times vary, but most transcripts are returned within a few business days.

Do I need to create an IRS.gov account for this process?

No. The current process uses Form 8821 and Persona verification only. You do not need to log into IRS.gov or create an account.

What happens after I complete Form 8821 and Persona verification?

Once verified, your tax information is authorized for three years. That means you won't need to repeat this process when reapplying during that time.

Is Persona part of the government?

No. Persona is a private, secure identity verification platform that Clarity uses to confirm your identity. It is not affiliated with the IRS or any government agency, and it does not share your information with the government. Persona helps ensure that your tax transcripts are requested securely and only by authorized representatives. Your data is encrypted and used solely for your school's financial aid application.

Why do I need to take a live selfie for verification?

As part of the identity check, you'll be asked to take a live selfie using your device's camera. This helps confirm that you're the person completing the application.

- The selfie must be taken live, not a photo of a photo, screenshot or old image.
- Make sure your face is clearly visible, well-lit, and matches your ID.
- If prompted, follow the on-screen instructions to complete the selfie step in real time.

Is my information secure?

Absolutely! Persona verification is designed with data security in mind through multi-layered approaches including data encryption (AES-256), regular vulnerability scanning, third-party audits, and adherence to global privacy standards like GDPR and CCPA.

This is a quote directly from their website: Persona will permanently destroy Scan Data upon completion of Verification or within six months of your last interaction with Persona.

How can Parent 2 complete Persona verification if they're not with me?

If Parent 2 isn't physically present, you can send them a secure link to complete their identity verification later. Persona gives you the option to send instructions by email or text message.

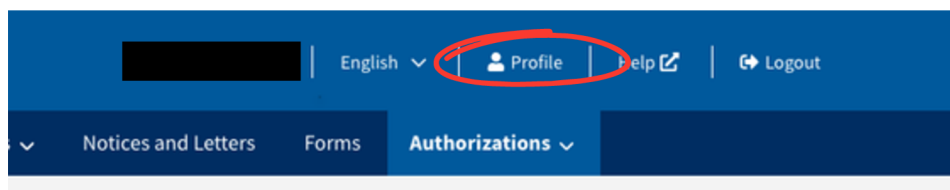
Questions on Sharing Taxes through [IRS.gov](https://irs.gov)

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 on Step 1 of the Tax Verification process. If there is a mismatch, update the information 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/address:

After your initial visit to the IRS website to approve the authorization, on your Clarity application, you will see a pop up asking if you see the authorization. If no authorization was showing, click "No, I Don't See a Request" (shown in Step 1 below). Clicking that will bring up the box shown in Step 2.

1

Do you see a Tax Information Authorization request in your online IRS account?

Under the 'Power of Attorney and Tax Information Authorizations' section in your IRS.gov account, you should see the following request.

Power of Attorney and Tax Information Authorizations

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
Maggiore, James	MM/DD/YYYY	TIA	Pending	Approve/Reject

Don't know where to find the request in your IRS account?
[Show me how](#)

Have a question or need additional help?
[Chat with support](#)

[No, I Don't See a Request](#) [Yes, I See a Request](#)

2

Not seeing a tax authorization request for Test?

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?](#)

test test
123 fake st
Normal, IL 61761

 **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](#)

This pop-up will show the name/address that was entered in the first step of the Tax Verification process. If that name/address does not match exactly what is showing on your IRS profile, click "Edit & Resubmit Request" to update the information and attempt to accept the authorization again.

Questions on sharing taxes through [IRS.gov](https://www.irs.gov)

I’m getting stuck in the IRS/ID.me 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

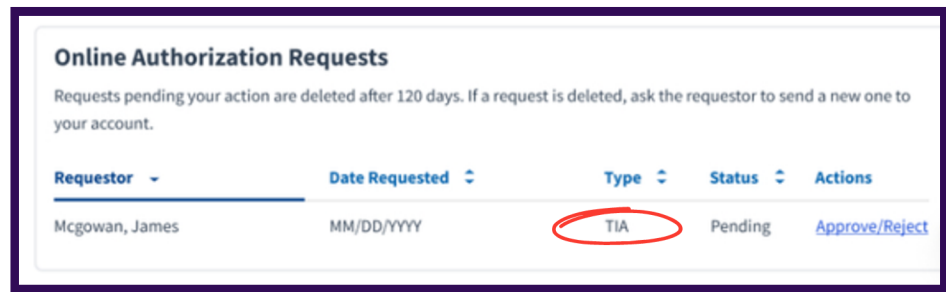
We have noticed that some families experience issues completing verification because they already have an ID.me account, and the IRS will not allow them to create a duplicate. It is worth double checking that you don’t have an active account, as their system doesn’t confirm that information while you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

I updated the details 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.

Are you asking for us to authorize a Power of Attorney?

No, 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 will not be 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 image)



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

I was able to authorize the request for the first guardian, but when I click on the IRS link for the second guardian, it still shows the authorization for the first guardian.

Chances are, the IRS website is still logged in to the first guardian’s account. Sign out of the IRS account and then click the “Open IRS in New Tab” button again. Then, log in using the second guardian’s account information.