

SSS Family Portal

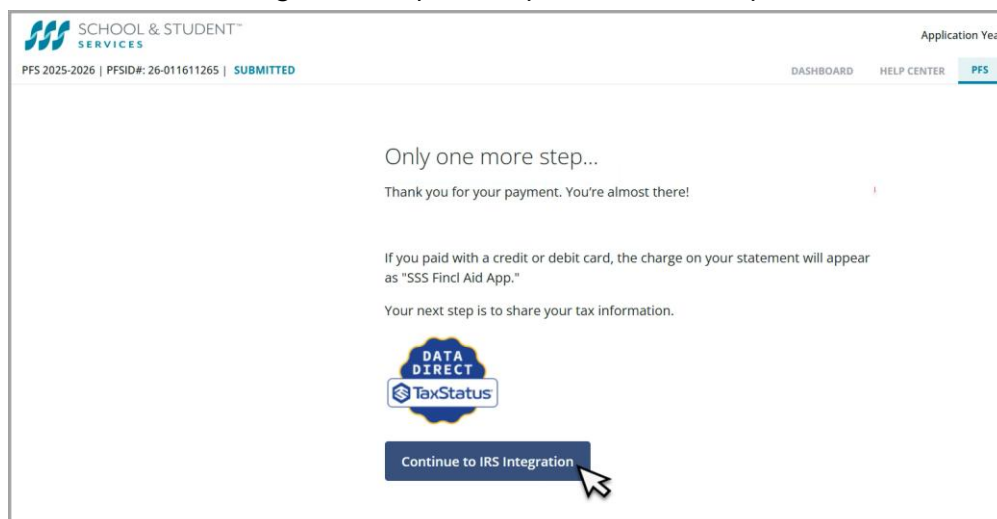
Sending IRS Data to your Application

New! Send your tax data directly from the IRS to your SSS financial aid application with TaxStatus

With SSS and TaxStatus, you can now provide consent for your IRS tax data to be directly sent to your financial aid application, eliminating the need to manually upload your tax documents like 1040s and W-2s.


How do I do it? The process is simple and fast! Follow the steps below to provide your consent for your tax data to be shared. You will also receive step-by-step instructions in SSS as you go.

1. After submitting your application, you will see a new step to share your tax information from the IRS, rather than manually uploading your documents. Click **Continue to IRS Integration** to provide your consent for your data to be shared.



2. You have two options to validate your identity before submitting your consent:
 1. Using your ID.me account is recommended for the quickest process. This is the same account you use to view your data on the IRS website
 2. You also have the option to complete a manual identity verification process that will compare a photo of your legal identifying document (such as a driver's license) with a 180-degree selfie.

Your selected school(s) require you to submit tax information. The TaxStatus service will save you hours of time and effort by automatically, privately, and securely collecting your tax information from the IRS.




To complete your request, we need your consent.

To complete your request, we need to verify your financial information with the IRS. Please complete the electronic consent here.

ELECTRONIC CONSENT

To get started, let's verify your identity.

1

 **Verify with ID.me**


Verification by ID.me | [What is ID.me?](#)

Having trouble? [Try this alternative](#)

2

Verifying with ID.me (Recommended):

1. If you already have an ID.me account, simply sign in. Otherwise, you may create an account for easier access in the future.



Sign in to ID.me

New to ID.me?
[Create an ID.me account](#)

* Indicates a required field

Email *





Password *

☐ Remember me
For your security, select only on your devices.

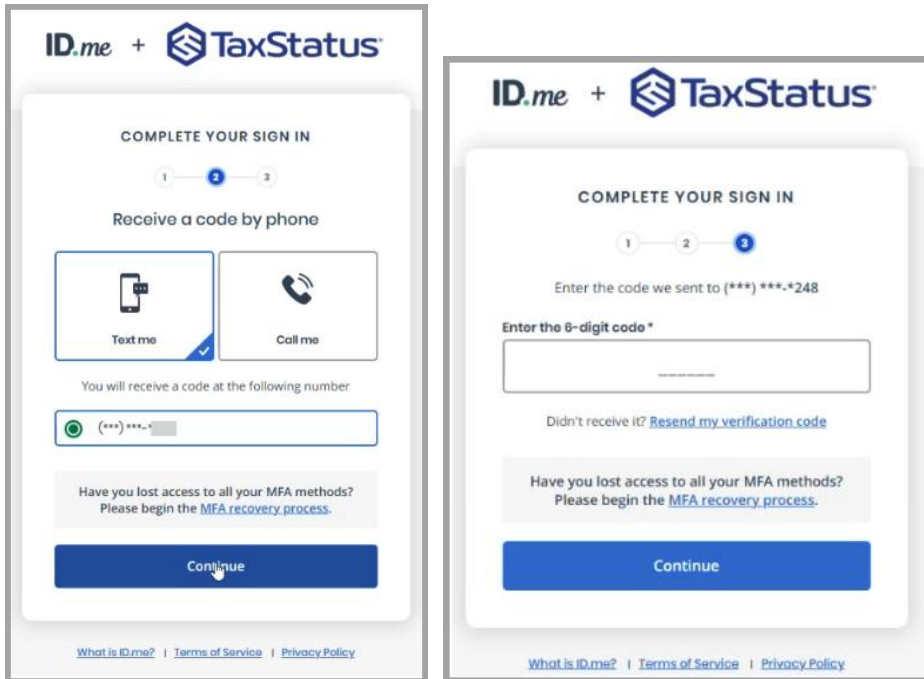
Sign in

[Forgot password](#)

OR

- Follow the on-screen prompts to complete the multi-factor authentication (MFA) via six-digit code.



ID.me + TaxStatus®

COMPLETE YOUR SIGN IN

1 — 2 — 3

Receive a code by phone

Text me Call me

You will receive a code at the following number

(*) (*) (*) - (*) (*) (*)

Have you lost access to all your MFA methods?
Please begin the [MFA recovery process](#).

Continue

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

ID.me + TaxStatus®

COMPLETE YOUR SIGN IN

1 — 2 — 3

Enter the code we sent to (*) (*) (*) - (*) (*) (*) 248

Enter the 6-digit code *

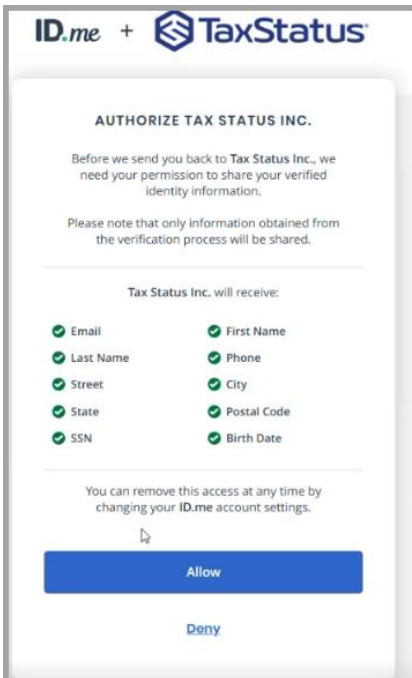
Didn't receive it? [Resend my verification code](#)

Have you lost access to all your MFA methods?
Please begin the [MFA recovery process](#).

Continue

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

- Click "Allow" to grant consent for TaxStatus to receive and pass to the IRS the listed relevant information to successfully retrieve your tax data/documents. (**SSS will never store your social security number**).



ID.me + TaxStatus®

AUTHORIZE TAX STATUS INC.

Before we send you back to Tax Status Inc., we need your permission to share your verified identity information.

Please note that only information obtained from the verification process will be shared.

Tax Status Inc. will receive:

✓ Email	✓ First Name
✓ Last Name	✓ Phone
✓ Street	✓ City
✓ State	✓ Postal Code
✓ SSN	✓ Birth Date

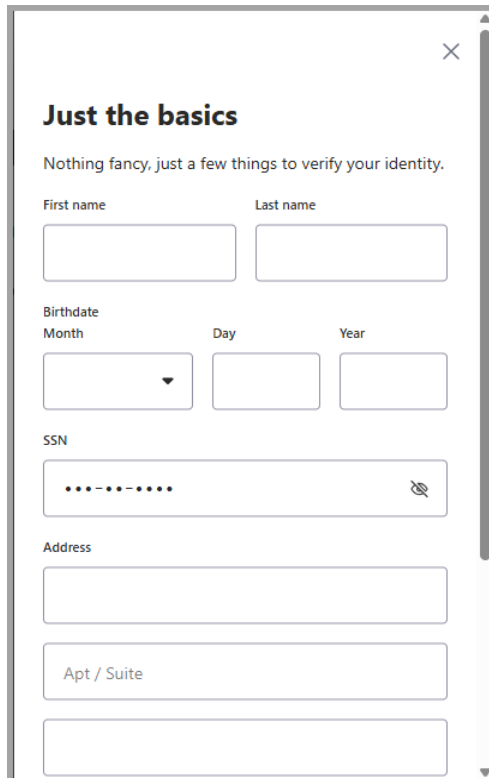
You can remove this access at any time by changing your ID.me account settings.

Allow

Deny

Manually Verifying Identity:

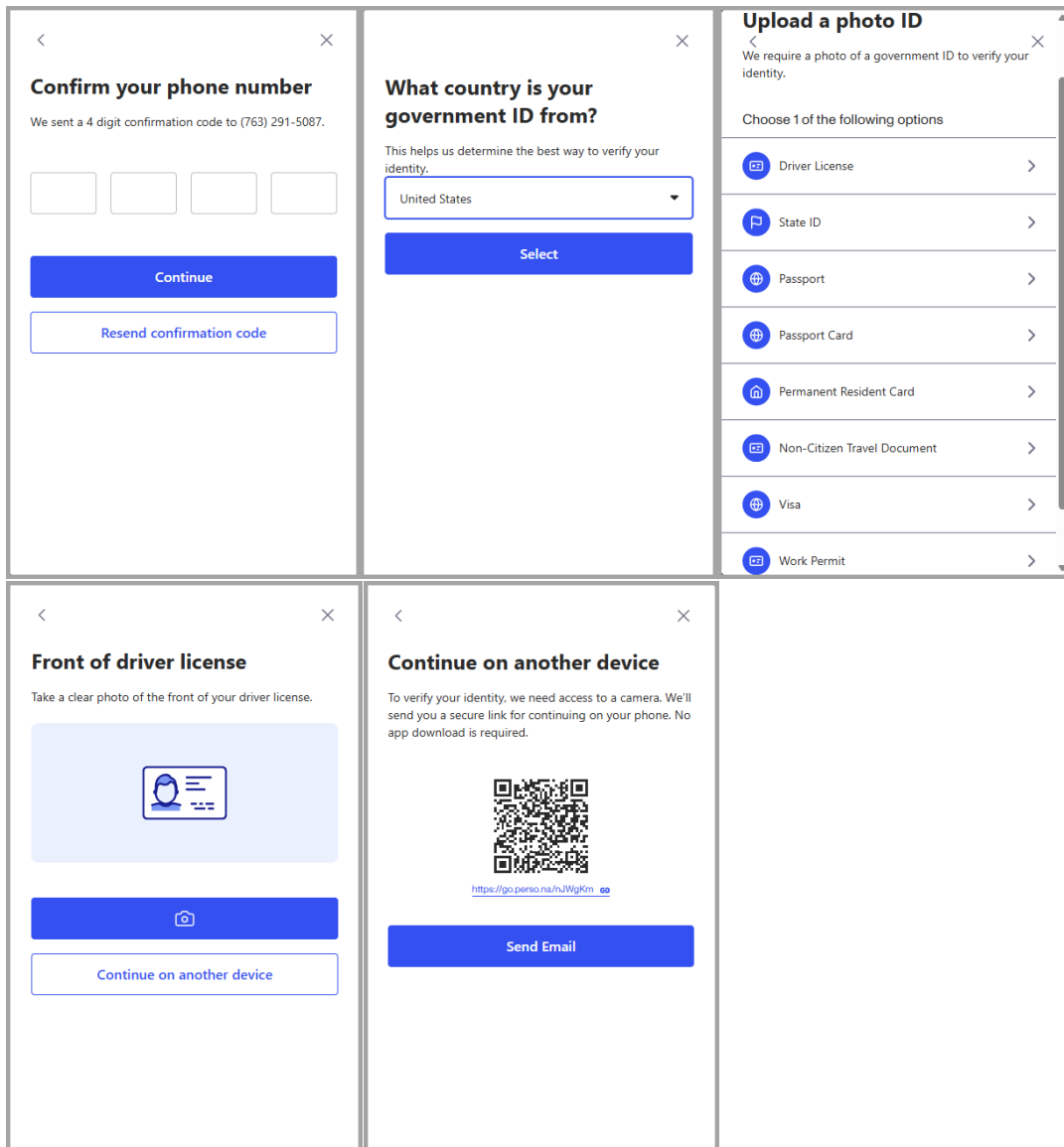
1. Most of your information will be pre-loaded from your Financial Aid application; however, you will need to enter your social security number for the IRS to process your consent form. **(SSS will never store your social security number).**
 - a. Ensure that your address listed matches the address where you last filed your federal taxes (1040).



The screenshot shows a web form titled "Just the basics" with a close button (X) in the top right corner. Below the title is the instruction: "Nothing fancy, just a few things to verify your identity." The form contains the following fields:

- First name**: A text input field.
- Last name**: A text input field.
- Birthdate**: Three input fields labeled "Month", "Day", and "Year". The "Month" field has a dropdown arrow.
- SSN**: A text input field with a masked format "●●●-●●-●●●" and a small icon to the right.
- Address**: A large text input field.
- Apt / Suite**: A text input field.
- An additional empty text input field at the bottom.

2. After confirming your phone number, select which government ID you would like to use to verify your identity and take a photo, followed by a 180-degree selfie. (This step is guided with easy-to-follow, on-screen instructions.) If your computer does not have a camera, or if you prefer, you may use your phone/tablet by simply scanning the QR code. You can also email yourself the link to continue your identity verification.



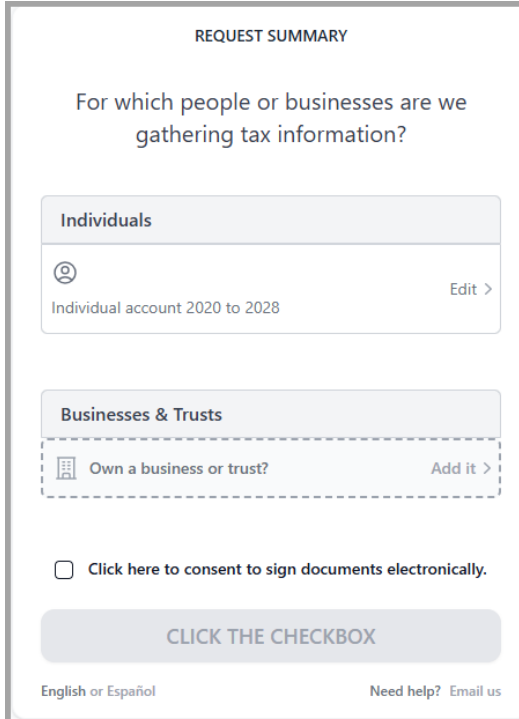
The collage displays five screens from the identity verification app:

- Confirm your phone number:** Shows a 4-digit confirmation code input field (with the example code 291-5087) and buttons for 'Continue' and 'Resend confirmation code'.
- What country is your government ID from?:** Features a dropdown menu with 'United States' selected and a 'Select' button.
- Upload a photo ID:** Lists various government ID options: Driver License, State ID, Passport, Passport Card, Permanent Resident Card, Non-Citizen Travel Document, Visa, and Work Permit.
- Front of driver license:** Instructs the user to take a clear photo of their driver license, showing a camera icon and a 'Continue on another device' button.
- Continue on another device:** Provides a QR code and a secure link (<https://go.perso.na/hJWgKm>) to continue verification on a phone, with a 'Send Email' button.

Business Consent (If Applicable):

If you own one or more business, you will also need to consent to sharing that business' tax information.


- Under **Business & Trusts**, click **Add it** to add each business (if not already listed). Otherwise, click **Edit** to provide business details




REQUEST SUMMARY

For which people or businesses are we gathering tax information?

Individuals

 Individual account 2020 to 2028 [Edit >](#)

Businesses & Trusts

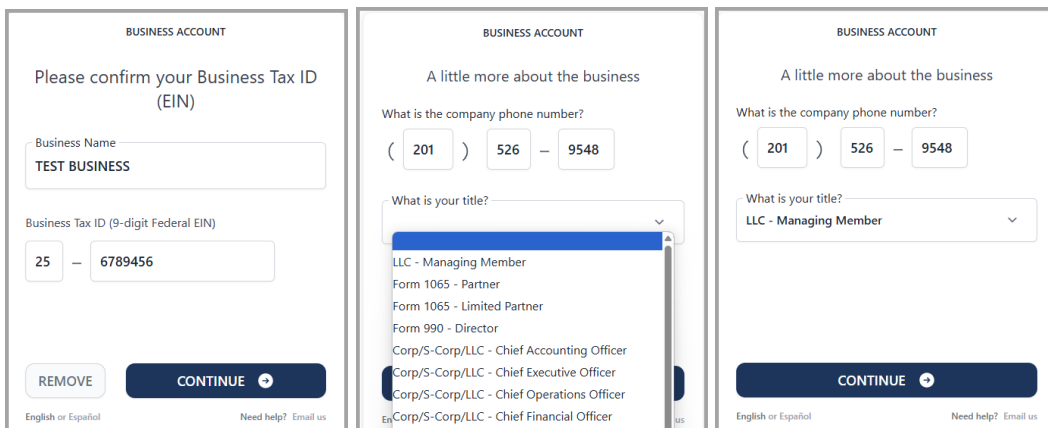
 Own a business or trust? [Add it >](#)

☐ [Click here to consent to sign documents electronically.](#)

CLICK THE CHECKBOX

English or Español [Need help? Email us](#)

- Enter the business account information (Business Name, EIN, company phone #, and your title).



BUSINESS ACCOUNT

Please confirm your Business Tax ID (EIN)

Business Name
TEST BUSINESS

Business Tax ID (9-digit Federal EIN)
25 - 6789456

[REMOVE](#) [CONTINUE +](#)

English or Español [Need help? Email us](#)

BUSINESS ACCOUNT

A little more about the business

What is the company phone number?
(201) 526 - 9548

What is your title?
 LLC - Managing Member
 Form 1065 - Partner
 Form 1065 - Limited Partner
 Form 990 - Director
 Corp/S-Corp/LLC - Chief Accounting Officer
 Corp/S-Corp/LLC - Chief Executive Officer
 Corp/S-Corp/LLC - Chief Operations Officer
 Corp/S-Corp/LLC - Chief Financial Officer

[CONTINUE +](#)

English or Español [Need help? Email us](#)

BUSINESS ACCOUNT

A little more about the business

What is the company phone number?
(201) 526 - 9548

What is your title?
LLC - Managing Member

[CONTINUE +](#)

English or Español [Need help? Email us](#)


3. To finish validating your business, you will need to provide proof of authority for that business. This proof should include the business name, EIN, and address. Follow the on-screen instructions for this step.

CONFIRM YOUR AUTHORITY

Upload a file (or take a picture) of **page 1** of your business tax return or a recent IRS letter that shows your business name and include any additional pages as necessary to show authority to sign for each business entity.

Limit: 2GB file size

Businesses



Choose Files

Screenshot 2...112.02 PM.png

☒ I certify I have authority to sign for these businesses.

CONTINUE

English or Español

Need help? Email us

Sign and Submit Consent

After verifying your identity and any businesses (if applicable,) follow the on-screen prompts to sign and submit your consent form.

REQUEST SUMMARY

For which people or businesses are we gathering tax information?

Individuals

Individual account 2020 to 2028

Edit >

Businesses & Trusts

TEST BUSINESS

Edit >

Business or trust account (2015 to 2028)

Own another business or trust?

Add it >

☐ Click here to consent to sign documents electronically.

CLICK THE CHECKBOX

English or Español

Need help? Email us

Sign by typing your name and date.

First name

Last name

Today's Date

CANCEL

I AGREE →

English or Español

Need help? Email us

Tax Information Authorization

Click SUBMIT to finalize the electronic signature and authorize the filing of IRS Form 8821 to collect your tax information.

8821
Use this form to authorize another person to represent you and collect your tax information.
Use only if you are an individual. Do not use if you are a business or trust.

Tax Information Authorization
Use this form to authorize another person to represent you and collect your tax information.
Use only if you are an individual. Do not use if you are a business or trust.

Signature required
Signature required

1. Checkboxes

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

2. Checkboxes

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

3. Checkboxes

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

4. Checkboxes

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

5. Checkboxes

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

6. Checkboxes

☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

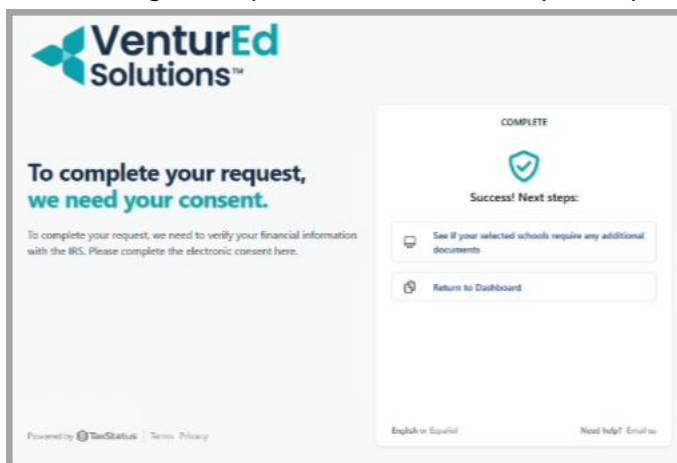
☐ I, **David Lee Smith**, authorize **John Doe** to represent me and collect my tax information.

English or Español

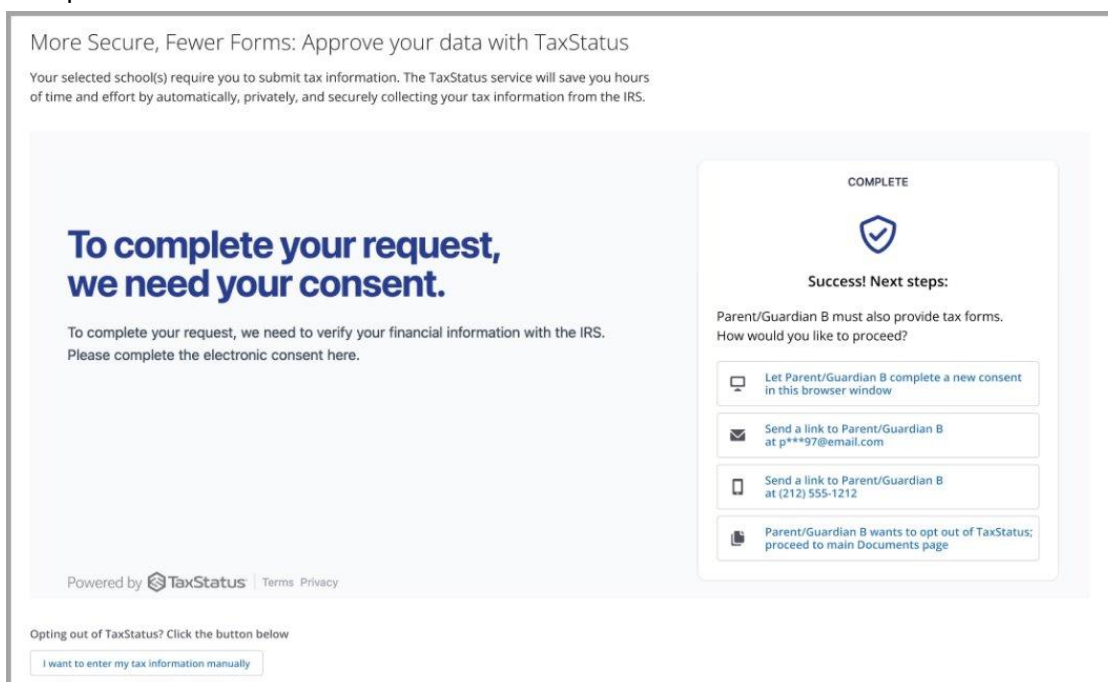
Need help? Email us

After Submitting your Consent:

1. If you are the only Parent/Guardian in the household, you will see the options to either navigate to your Dashboard or to your My Documents page.

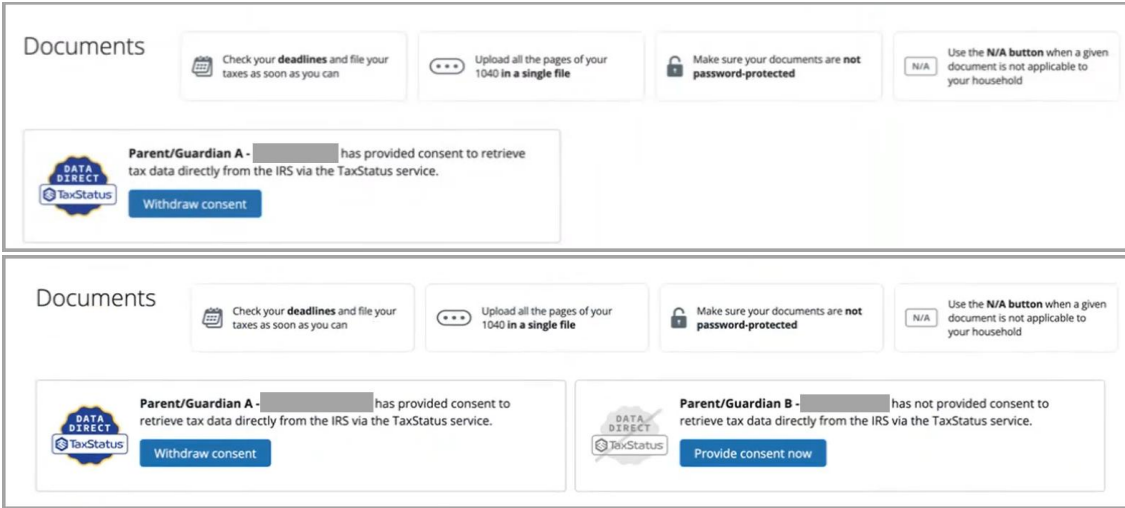


2. If there is a Parent/Guardian B in your household, they will also need to submit their consent form. This is because each individual taxpayer owns their tax data, and only they can provide consent to access that data. Parent/Guardian B can complete consent during your current session, or you may email/text them a link to complete their consent form later.



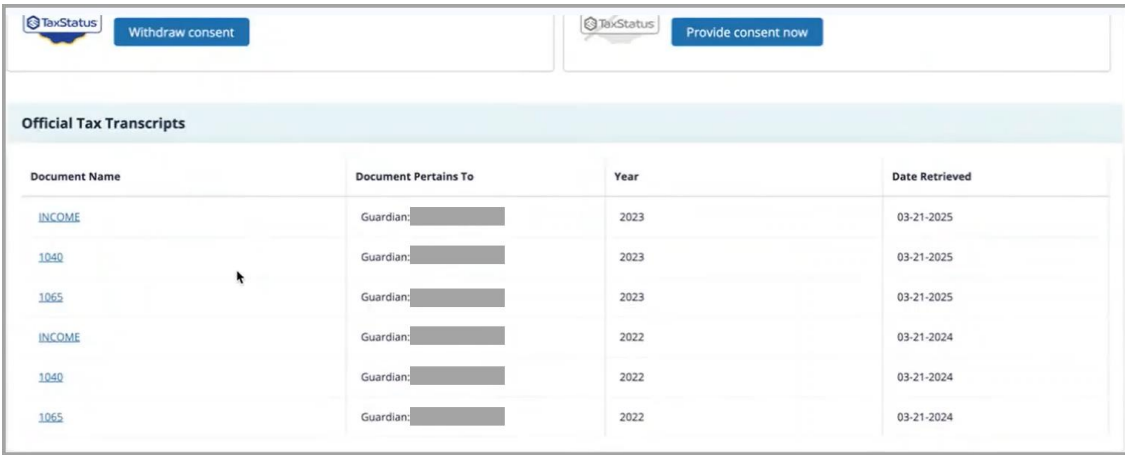
Viewing IRS Consent Status and Transcripts:

- From your **My Documents** page, you will be able to verify which Parent(s)/Guardian(s) have completed their consent form, granting easy access to IRS-direct data/documents. You can also add or withdraw consent from this page via the buttons on screen.



The screenshot shows the 'Documents' page with instructions at the top: 'Check your deadlines and file your taxes as soon as you can', 'Upload all the pages of your 1040 in a single file', 'Make sure your documents are not password-protected', and 'Use the N/A button when a given document is not applicable to your household'. Below, there are two sections for Parent/Guardian A and Parent/Guardian B. Parent/Guardian A has provided consent and has a 'Withdraw consent' button. Parent/Guardian B has not provided consent and has a 'Provide consent now' button.

- You may also view any of your tax transcripts that have been retrieved from the IRS as soon as they are available in the **Official Tax Transcripts** section.

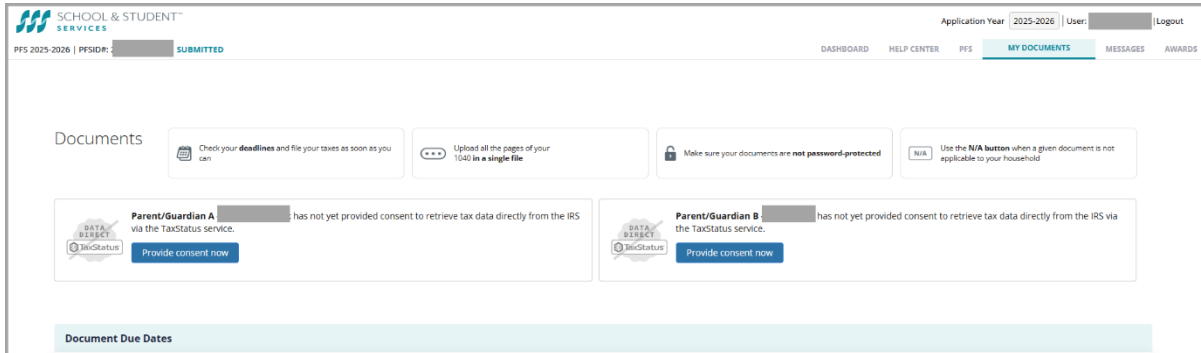


The screenshot shows the 'Official Tax Transcripts' section with a table of retrieved transcripts. The table has four columns: Document Name, Document Pertains To, Year, and Date Retrieved. The table lists transcripts for INCOME, 1040, and 1065 for the years 2023 and 2022, all retrieved on 03-21-2025.

Document Name	Document Pertains To	Year	Date Retrieved
INCOME	Guardian: [REDACTED]	2023	03-21-2025
1040	Guardian: [REDACTED]	2023	03-21-2025
1065	Guardian: [REDACTED]	2023	03-21-2025
INCOME	Guardian: [REDACTED]	2022	03-21-2024
1040	Guardian: [REDACTED]	2022	03-21-2024
1065	Guardian: [REDACTED]	2022	03-21-2024

What if I have already manually uploaded all of my tax documents for my current Financial Aid application? No problem! Because your TaxStatus consent is good for three years, you can take the time now to get ahead for next year. And, because your updated tax data will be available when it's time to apply for Financial Aid again, you won't need to spend time searching for it – it's all right there for you.

To provide your TaxStatus consent in this case, simply log in, navigate to **My Documents**, and click the **Provide consent now** button to follow the normal process (detailed above).



The screenshot displays the 'My Documents' page in the School & Student Services portal. The top navigation bar includes 'Application Year: 2025-2026', 'User: [redacted]', and a 'Logout' link. The main content area is titled 'Documents' and contains several instructional cards: 'Check your deadlines and file your taxes as soon as you can', 'Upload all the pages of your 1040 in a single file', 'Make sure your documents are not password-protected', and 'Use the N/A button when a given document is not applicable to your household'. Below these, there are two consent prompts for 'Parent/Guardian A' and 'Parent/Guardian B', each stating 'has not yet provided consent to retrieve tax data directly from the IRS via the TaxStatus service.' and featuring a 'Provide consent now' button. At the bottom, a 'Document Due Dates' section is partially visible.