



File Name	Entering Student Permissions_Tax Data.doc
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Entering Student Permissions_Tax Data

Concept

Consent for someone other than a student to review/discuss/change the student's record can be granted in two ways. The preferred method is for the student to complete and submit a form that specifies who has access to their records. When a consent form is submitted, the person/s noted on the form have access to the student's record until the student indicates otherwise.

When a consent form is not submitted but the Financial Aid Office receives information via the tax verification process that the student was claimed on a federal tax form, consent to access the student's record is given to whoever claimed the student.

This topic covers how to allow consent based on Federal Tax Records.



Navigation



Step	Action
1.	Click the University of Maine Systems link. ▶ University of Maine Systems
2.	Click the Records and Enrollment link. ▶ Records and Enrollment
3.	Click the Student Permissions link. ▶ Student Permissions



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Student Permissions

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID:

Campus ID:

National ID:

Last Name:

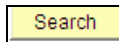
First Name:

Include History Correct History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Step	Action
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- | | |
|----|---|
| 4. | On the Student Permissions lookup page, enter your search criteria. Ideally, you should enter the student's MaineStreet ID in the ID field. |
| 5. | When ready, click the Search button. |



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Student Permissions

Luke Skywalker 0099999

Find | View All | First | 1 of 1 | Last

*Academic Institution: UMS05 University of Maine

*Student Permission:

Find | View All | First | 1 of 1 | Last

*Effective Date: *Status: Active

Comments

Save | Return to Search | Notify | Update/Display | Include History | Correct History

Step	Action
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- | | |
|----|--|
| 6. | The <i>Student Permissions</i> field is where you will indicate whether the consent is based on a submitted consent form or based on tax information received by the Financial Aid Office. |
|----|--|

Click the *Look up Student Permission* button to lookup and select the appropriate option.





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Look Up Student Permission

Academic Institution: UMS05

Student Permission: begins with

Description: begins with

Short Description: begins with

[Basic Lookup](#)

Search Results

View All First 1-2 of 2 Last

Student Permission	Description	Short Description
CONS	Consent	Consent
TAX	Tax	Tax

Step	Action
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7. Since you are granting consent based on federal tax information received by the Financial Aid Office, select **TAX** from the list.

TAX	Tax	Tax
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Student Permissions

Luke Skywalker 0099999

Find | View All First 1 of 1 Last

*Academic Institution: UMS05 University of Maine

*Student Permission: TAX Tax

Find | View All First 1 of 1 Last

*Effective Date: 08/20/2007 *Status: Active

Comments

Save | Return to Search | Notify | Update/Display | Include History | Correct History

Step	Action
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- | | |
|----|--|
| 8. | The Comments field is where you will enter information about the person who claimed the student on the federal tax form. If the information was received from the Financial Aid Office, enter the following information for the person who is getting access to the student's record: |
|----|--|

TY (*the tax year*) (FA) Permissible for the (*year-year*) academic year.
The person's *first name, last name* and *last 4 digits of the Social Security Number*.

If the Declaration of Dependency Status Federal Income Tax Return was received use the same format as above except do not use the (FA) indicator.

For this example, we'll enter:

TY 2006 (FA): Permissible for 07 – 08 academic year.
Anakin Skywalker 9999



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Student Permissions

Luke Skywalker 0099999

Find | View All | First | 1 of 1 | Last

*Academic Institution: UMS05 University of Maine

*Student Permission: TAX Tax

Find | View All | First | 1 of 1 | Last

*Effective Date: 08/20/2007 *Status: Active

Comments

TY 2006 (FA): Permissible for 07 – 08 academic year.
Anakin Skywalker 9999

Save | Return to Search | Previous in List | Next in List | Notify | Update/Display | Include History | Correct | history

Step	Action
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- | | |
|----|--|
| 9. | Since consent to access the student's record is only allowed during the current tax year, you must add a row to this record to indicate when this period will end. |
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Click the plus sign to add a new row.



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Student Permissions

Luke Skywalker 0099999

Find | View All | First | 1 of 1 | Last

*Academic Institution: UMS05 University of Maine

*Student Permission: TAX Tax

Find | View 1 | First | 1-2 of 2 | Last

*Effective Date: 08/20/2006 *Status: Active

Comments
Tax Year 2006: Anakin Skywalker 9999

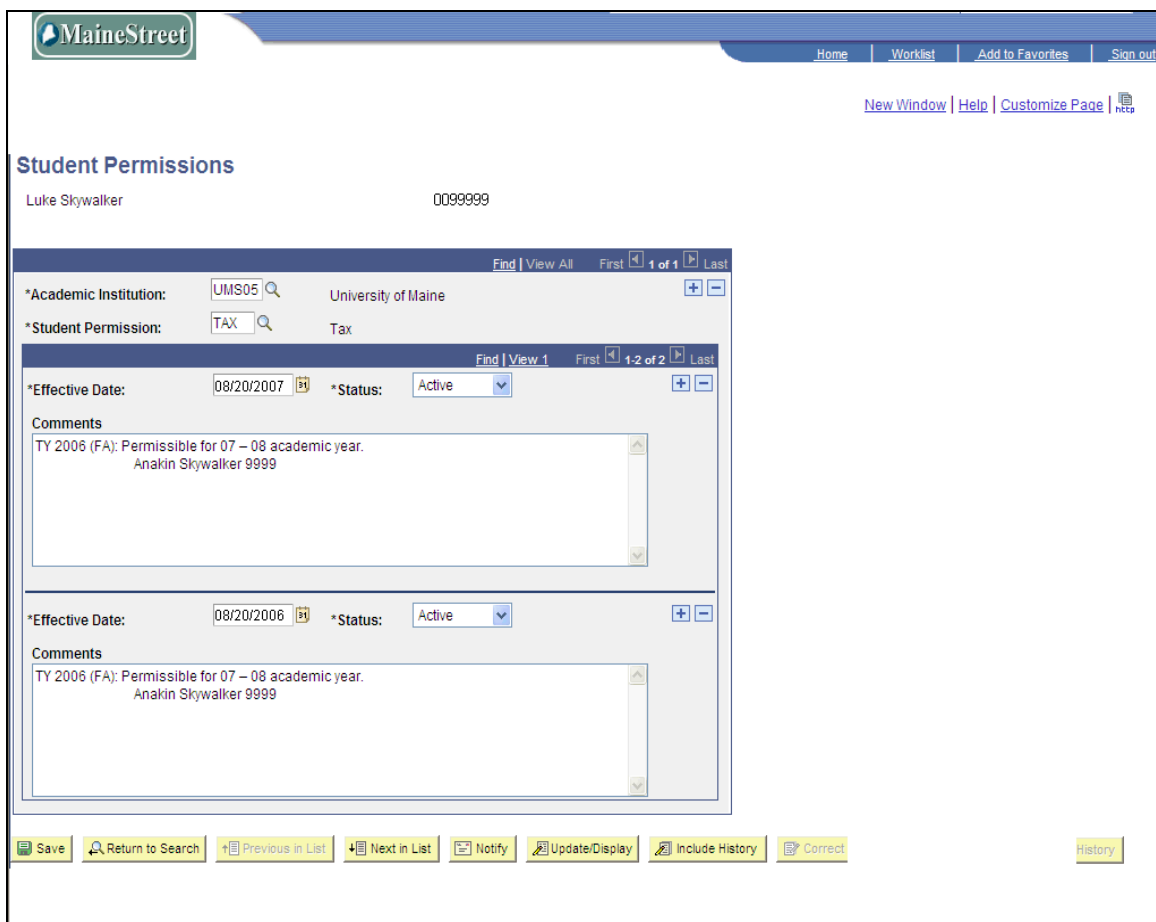
*Effective Date: 08/20/2006 *Status: Active

Comments
Tax Year 2006: Anakin Skywalker 9999

Save | Return to Search | Notify | Update/Display | Include History | Correct History

Step	Action
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- | | |
|-----|---|
| 10. | Enter the last date of the tax year in the <i>Effective Date</i> field. |
|-----|---|



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Student Permissions

Luke Skywalker 0099999

Find | View All | First | 1 of 1 | Last

*Academic Institution: UMS05 University of Maine

*Student Permission: TAX Tax

Find | View 1 | First | 1-2 of 2 | Last

*Effective Date: 08/20/2007 *Status: Active

Comments
TY 2006 (FA): Permissible for 07 - 08 academic year.
Anakin Skywalker 9999

*Effective Date: 08/20/2006 *Status: Active

Comments
TY 2006 (FA): Permissible for 07 - 08 academic year.
Anakin Skywalker 9999

Save | Return to Search | Previous in List | Next in List | Notify | Update/Display | Include History | Correct | History

Step	Action
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- | | |
|-----|--|
| 11. | Click on the drop-down arrow in the <i>Status</i> field. |
|-----|--|



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Student Permissions

Luke Skywalker 009999

Find | View All | First | 1 of 1 | Last

*Academic Institution: UMS05 University of Maine

*Student Permission: TAX Tax

Find | View 1 | First | 1-2 of 2 | Last

*Effective Date: 08/29/2007 *Status: Active

Comments
TY 2006 (FA): Permissible for 07 – 08 academic year.
Anakin Skywalker 9999

*Effective Date: 08/29/2006 *Status: Active

Comments
TY 2006 (FA): Permissible for 07 – 08 academic year.
Anakin Skywalker 9999

Save | Return to Search | Previous in List | Next in List | Notify | Update/Display | Include History | Correct | History

Step	Action
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- | | |
|-----|---------------------------------------|
| 12. | Select <i>Inactive</i> from the list. |
|-----|---------------------------------------|

Inactive



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Student Permissions

Luke Skywalker 0099999

Find | View All First 1 of 1 Last

*Academic Institution: UMS05 University of Maine

*Student Permission: TAX Tax

Find | View 1 First 1-2 of 2 Last

*Effective Date: 08/29/2007 *Status: Inactive

Comments
TY 2006 (FA): Permissible for 07 – 08 academic year.
Anakin Skywalker 9999

*Effective Date: 08/29/2006 *Status: Active

Comments
TY 2006 (FA): Permissible for 07 – 08 academic year.
Anakin Skywalker 9999

Save Return to Search Previous in List Next in List Notify Update/Display Include History Correct history

Step	Action
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13.	When all is set, click the Save button.
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14.	End of Procedure.
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