



# OHIO UNIVERSITY

## Tax Extension Request Form 2022-2023

Answer each question regarding the student and if applicable, the students' supporting parent(s). Visit <https://www.ohio.edu/financial-aid/forms> for directions on submitting your forms using our Secure Upload Portal, mailing, or faxing.

\_\_\_\_\_  
**Student Name**

\_\_\_\_\_  
**Student PID (Pxxxxxxxx)**

\_\_\_\_\_  
**Written Student Signature (Electronic Signature Not Accepted)**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Students Spouse Name (if applicable)**

\_\_\_\_\_  
**Written Students Spouse Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Parent Name (Required for dependent students)**

\_\_\_\_\_  
**Written Parent Signature**

\_\_\_\_\_  
**Date**

Student, spouses, or parents who have requested an extension beyond the automatic 6 month extension for the 2020 federal tax return must provide the following information to be considered for federal financial aid. No expired extension forms will be accepted for this process. Once the tax return extension has expired, the tax filer will be required to provide the 2020 IRS tax return transcript. Awards may be adjusted based on the final tax return information. Failure to provide the 2020 IRS tax return transcript after the extension has expired will result in a reversal of federal financial aid.

1. The following individual, whose information is required on the FAFSA has requested the tax extension for the 2020 federal tax filing year?

\_\_\_\_\_ Student

\_\_\_\_\_ Student's spouse

\_\_\_\_\_ Both Parents

\_\_\_\_\_ Parent 1 Name: \_\_\_\_\_

\_\_\_\_\_ Parent 2 Name: \_\_\_\_\_

2. What federal income tax return would the person requesting the extension file for 2020?

\_\_\_\_\_ IRS 1040

\_\_\_\_\_ U.S. Territory

\_\_\_\_\_ Foreign Tax Return

3. What would be the federal tax filing status of the individual who has filed the extension for 2020?

\_\_\_\_\_ Single

\_\_\_\_\_ Head of Household

\_\_\_\_\_ Widow(er)

\_\_\_\_\_ Married-filed joint return

\_\_\_\_\_ Married-filed separate return

4. Would the individual who filed an extension be required to file a schedule 1?      Yes  No

5. Indicate below the tax documents that apply to the individual filing the tax extension. Submit these documents with this form.

	Student	Spouse	Parent (s)
<b>2020 W-2 Forms</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>2020 Self Employment (provide a signed statement indicating estimated AGI and income taxes paid in 2020)</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. Attach/submit the following items associated with the individuals who have filed an extension:

- Copy of unexpired 2020 IRS approval for extension beyond the automatic 6 month
- Verification of Non-Filing Letter from IRS dated after October 1, 2021
- Copy of all documents checked in question 5

Note: Additional documentation may be requested upon review of the information submitted.

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