



Your 2023-2024 Free Application for Federal Student Aid (FAFSA) was selected for required verification. You must answer all questions below and sign. Your financial aid processing will not be complete until you submit this Worksheet. 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

Household Questions

- Select all of the following federal benefits received by any member of your family in 2021 or 2022. If no one in your family receives any of these benefits, select Not Applicable.

<input type="checkbox"/> Not Applicable	<input type="checkbox"/> Supplemental Nutrition Assistance (SNAP)
<input type="checkbox"/> Medicaid/Supplemental Security Income (SSI)	<input type="checkbox"/> Free or Reduced Price School Lunch
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infant, and Children (WIC)	<input type="checkbox"/> Temporary Assistance Needy Families (TANF)

- As of the time you filed the FAFSA**, what is your marital status?

<input type="checkbox"/> Single	<input type="checkbox"/> Widowed	<input type="checkbox"/> Divorced
<input type="checkbox"/> Married/Remarried	<input type="checkbox"/> Separated	

Please provide the effective date of your marital status above.

If you were married when you filed the 2023-2024 FAFSA, you MUST provide your spouse's 2021 tax information even if you were not married in 2021.

- What was your federal tax filing status for 2021?

<input type="checkbox"/> Single	<input type="checkbox"/> Married Filing Separate	<input type="checkbox"/> Qualifying Widow(er)
<input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Head of Household	<input type="checkbox"/> Did Not File

If your 2021 tax filing status is different than your current marital status, provide an explanation:

List individuals in your household. Include:

- Yourself, the student and your spouse (if applicable).
- Your dependent children for whom **1)** you provide more than half of their support from July 1, 2023, through June 30, 2024, even if the child does not live with you **OR 2)** you would be required to provide your parental information if they completed a 2023-2024 FAFSA, even if a child does not live with you.
- Other people if they now live with you and you provided more than half of their support and will continue to provide more than half of their support through June 30, 2024.

List all household members as described above in the spaces below. Indicate individuals who are or will be enrolled at least half time in a degree, diploma, or certificate program in the 2023-2024 academic year.

Full Name	Age	Relationship	Enrolled in College	College Name
<i>Student Name</i>		<i>Self</i>	<i>Yes</i>	<i>Ohio University</i>

Student Name

Student PID (Pxxxxxxxx)

Financial Questions:

1. What is your 2021 federal tax return filing status?
 - I filed my 2021 tax return. You must provide your tax information. Indicate below how you will do so:
 - Used the IRS DRT when FAFSA was submitted and did not make changes to the information.
 - Send 2021 Federal Tax Return Transcript – Obtain your 2021 tax return transcript at www.irs.gov. Under Tools, select "Get my tax record". DO NOT select "IRS Tax Account Transcript".
 - I have an unexpired extension on my 2021 federal tax return.
 - I will not and was not required to file a 2021 federal tax return. You MUST provide Verification of Non-filing Letter from the IRS at www.irs.gov dated on or after October 1, 2022. Answer question 3 below.
2. If you are married, what is your spouse's 2021 federal tax return filing status?
 - My spouse filed a 2021 federal tax return. You must provide his/her 2021 tax return transcript if it was not a married-joint tax return with the student.
 - My spouse has an unexpired extension on his/her 2021 federal tax return.
 - My spouse will not and was not required to file a 2021 federal tax return. Your spouse MUST provide a Verification of Non-filing Letter from the IRS at www.irs.gov dated on or after October 1, 2022. Answer question 3 below.
3. If you OR your spouse (if applicable) will not file a 2021 federal tax return, did you/your spouse have earnings in 2021?

Student: No Yes Spouse (if applicable): No Yes

If you answered "YES", provide the name of all employers and earnings for which you OR your spouse worked in 2021. You MUST provide an employer W-2 form for each employer listed.

Employer's Name	Student/Spouse	Annual 2021 Earnings

Information for Individuals with Special 2021 Tax Filing Considerations:

Unexpired 2021 Tax Filing Extension

An individual who is required to file a 2021 federal income tax return and has been granted a filing extension by the IRS, must provide all of the following documents:

- Copy of IRS Form 4868, "Application for Automatic Extension of Time to File U.S. Individual Income Tax Return," filed with the IRS for tax year 2021. After October 16, 2022 a copy of the IRS's approval of an extension beyond the six-month extension for tax year 2021.
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2022.
- Copy of all W-2 forms for each source of income received for tax year 2021.
- If self-employed, a signed statement certifying the amount of the individual's Adjusted Gross Income and the U.S. income tax paid for tax year 2021.

Amended 2021 Tax Return

An individual who filed a 2021 Federal Amended Tax Return, must provide all of the following documents:

- Signed copy of the 2021 IRS Form 1040X filed with the IRS and a copy of 2021 tax return transcript, OR
- Copy of the 2021 Record of Account Transcript.

Victim of IRS Tax-Related Identity Theft

An individual who is a victim of tax-related identity theft, must provide all of the following documents:

- If unable to acquire the 2021 tax return transcript from IRS, a copy of Tax Return DataBase View (TRDBV) transcript – To obtain the TRDBV, call 1-800-908-4490.
- Signed statement indicating you were a victim of identity theft and that the IRS is aware.