Verification Worksheet – Dependent Student 2026-2027

Your 2026-2027 Free Application for Federal Student Aid (FAFSA) was selected for verification. You must answer all questions below. Signatures are required for both student and parent. Your financial aid processing will not be complete until you submit this form. Visit https://www.ohio.edu/financial-aid/forms for directions on submitting your forms using our Secure Upload Portal, or by mail or fax.

Student Name _____ **Student PID (Pxxxxxxxxx)** _____

Written Student Signature (Electronic Signature Not Accepted) _____ **Date** _____

Written Parent Signature (Electronic Signature Not Accepted) _____ **Date** _____

Household Questions

1. Select all of the following federal benefits received by any member of your family in 2024 or 2025. If no one in your family received any of these benefits, select Not Applicable.

- ☐ Earned Income Tax Credit (EITC)
- ☐ Federal Free/Reduced Price School Lunches
- ☐ Sec. 36B Refundable Credit for Premium Assistance Coverage under a Qualified Health Plan (QHP) (include IRS Schedule 8962)
- ☐ Supplemental Security Income (SSI)
- ☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- ☐ Federal Housing Assistance
- ☐ Medicaid
- ☐ Supplemental Nutrition Assistance Program (SNAP) (formally known as Food Stamps)
- ☐ Temporary Assistance for Needy Families (TANF)
- ☐ Not Applicable

2. **As of the time you filed the FAFSA,** what best described your biological or adoptive parents' marital status?

- ☐ Never Married to each other, living separately
- ☐ Never Married to each other, living together
- ☐ Married to each other currently
- ☐ Widowed
- ☐ Separated and living together
- ☐ Separated and living separately
- ☐ Divorced and living together
- ☐ Divorced and living separately

a. In the box below, provide the effective date of the marital status of your parents marked above. **If your biological/ adoptive parents were married or unmarried, but living together, you MUST provide both parents' 2024 tax information on your 2026-2027 FAFSA.**

If your biological/adoptive parents were not married, and not living together at the time you filed the FAFSA, your supporting parent is the parent who provided the most financial support in the last year.

b. Please provide the following information about your supporting parent:

Name: _____ Date of birth: _____ Last four digits of SSN: _____

3. **At the time you filed the FAFSA,** was your supporting parent married?

☐ Yes ☐ No (skip to question 4)

a. In the box below, provide the date your supporting parent was most recently married. **If your supporting parent is now married or re-married, his or her spouse's 2024 tax information MUST be provided on the 2026-2027 FAFSA.**

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Office of Student Financial Aid and Scholarships
Chubb Hall 020
1 Ohio University Drive
Athens, OH 45701-2979

DO NOT SEND COMPLETED DOCUMENTS BY EMAIL. PLEASE USE OUR SECURE UPLOAD PORTAL OR SEND BY MAIL OR FAX.
https://www.ohio.edu/financial-aid/forms

Questions?
financial.aid.verification@ohio.edu
Phone: (740) 593-4141
Fax: (740) 593-4140

Student Name _____ **Student PID (Pxxxxxxxxx)** _____

4. **Since competing the FAFSA,** has your supporting parent's marital status changed?
   ☐ Yes ☐ No (skip to question 5)
   a. In the box below, provide the date your supporting parent's marital status changed or write N/A.

   b. What is the **current** marital status of your supporting parent? (pick one)
   ☐ Never Married to each other, living separately
   ☐ Never Married to each other, living together
   ☐ Married to each other currently
   ☐ Widowed
   ☐ Separated and living together
   ☐ Separated and living separately
   ☐ Divorced and living together
   ☐ Divorced and living separately

If your supporting parent is now married, his or her spouse MUST be included in your parent's household in section 6. below. We may request a copy of their 2024 tax returns and W-2 forms.

Parent Financial Information: As a requirement for federal student aid eligibility, all FAFSA contributors must consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective or if you did not file a 2024 IRS income tax return. If married parents filed separately, then both parents are required to consent. **If your parents' 2024 income tax return information was not available or could not be used**, you must provide us with a signed copy of their 2024 income tax return(s) and all applicable schedules, or a 2024 IRS Tax Return Transcript(s).

5. What was **your supporting parent's** federal tax filing status for 2024?
   ☐ Single
   ☐ Head of Household
   ☐ Qualifying Widower
   ☐ Married Filing **Separately**
   ☐ Married Filing Jointly with **Current Spouse**
   ☐ Married Filing Jointly with **Former Spouse**
   ☐ Did Not/Will Not File (proceed to a. below)

   a. **If any contributing parent Did Not/Will Not File** a 2024 federal tax return, did they have any 2024 earnings?
   ☐ No (enter N/A in section 5b. below) ☐ Yes (proceed to section 5b. below)

   b. **If any contributing parent answered "YES" in section 5a. above**, provide the name of all employers for which your parent(s) worked in 2024 and earnings from each employer. You MUST provide an employer W-2 form for each employer listed.

Employee's Name	Employer's Name	Annual 2024 Earnings

   c. If your supporting parent's 2024 tax filing status is different than his/her current marital status, provide an explanation:

_____

_____

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Student Name **Student PID (Pxxxxxxxxx)**

6. **List individuals in your supporting parents' household.**

Include:

- Yourself (student) and supporting parent(s) (include stepparent) even if you do not live with your parents.
- Your supporting parents' other children if they will receive more than half of their support from your parent(s) between July 1, 2026, through June 30, 2027, even if the child does not live with the parent(s).
- Other people if they now live with your parent(s) and your parent(s) provides more than half of their support and will continue to provide more than half of that person's support through June 30, 2027.

List all household members described above in the spaces below. Attach an additional page if necessary.

Full Name	Date of Birth	Relationship
Student Name		*Self*
Parent Name		*Parent*

Student Financial Information: As a requirement for federal student aid eligibility, all applicants must consent and approve sharing and importing income and tax information from the IRS to the FAFSA form, even if the attempt to obtain or use such data is ineffective or if you did not file a 2024 IRS income tax return. **If your 2024 income tax return information was not available or could not be used**, you *must* provide us with a signed copy of the 2024 income tax return and all applicable schedules, or a 2024 IRS Tax Return Transcript(s).

7. What was **your** federal tax filing status for 2024?

- ☐ Single
- ☐ Head of Household
- ☐ Qualifying Widower
- ☐ Married Filing **Separately**
- ☐ Married Filing Jointly with Current Spouse
- ☐ Married Filing Jointly with Former Spouse
- ☐ Did Not/Will Not File (proceed to a. below)

a. **If you Did Not/Will Not** file a 2024 federal tax return, did you have any earnings in 2024?

☐ No (enter N/A in section 7b. below) ☐ YES (proceed to 7b. below)

b. **If you answered "YES" in section 7a. above**, provide the name of all employers for which you worked and your 2024 earnings from each employer. You MUST provide an employer W-2 form for each employer listed.

Employer's Name	Annual 2024 Earnings

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Student Name **Student PID (Pxxxxxxxxx)**

Information for Individuals with Special 2024 Tax Filing Considerations:

Unexpired 2024 Tax Filing Extension

An individual who is required to file a 2024 federal income tax return and has been granted a filing extension by the IRS, must provide all of the following documents:

- A signed statement listing the sources of any 2024 income and the amount of income from each source;
- A 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 2024.
- A copy of the IRS's approval of an extension beyond the six-month extension for tax year 2024.
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2025.
- Copy of all W–2 forms for each source of income received for tax year 2024.
- 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 2024.

Amended 2024 Tax Return

An individual who filed an amended IRS income tax return for tax year 2024 must provide a signed copy of the 2024 IRS Form 1040X, “Amended U.S. Individual Income Tax Return,” that was filed with the IRS or documentation from the IRS that include the change(s) made by the IRS, in addition to one of the following:

- Updated income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A 2024 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed), or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; or
- A signed copy of the 2024 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Victim of IRS Tax-Related Identity Theft

An individual who is a victim of tax-related identity theft, must work with the IRS Identity Protection Specialized Unit (IPSU) at 1-800-908-4490 or https://www.irs.gov/identity-theft-central to provide all of the following documents:

- Copy of signed 2024 tax return and applicable schedules and:
  - IRS 4674C letter (letter from IRS acknowledging identity theft)
  - or
  - Signed and dated statement from tax filer indicating they are victim of IRS tax-related identity theft and IRS has been made aware of it