Verification Worksheet – Independent 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 _____ **Date** _____
(Electronic Signature Not Accepted)

Written Spouse Signature (if applicable) _____ **Date** _____
(Electronic Signature Not Accepted)

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) (attach 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 marital status?

☐ Single/Never Married ☐ Married or Remarried ☐ Separated
☐ Widowed ☐ Divorced

a. In the box below, provide the effective date of your marital status marked above. **If you were married when you filed the 2026-27 FAFSA, you must provide your spouse's 2024 tax information even if you were not married in 2024.**

3. **Since competing the FAFSA,** has your marital status changed?

☐ Yes ☐ No (skip to question 4)

a. **If you answered Yes above**, in the box below, provide the date your marital status changed.

b. What is your **current** marital status?

☐ Single/Never Married ☐ Married or Remarried ☐ Separated
☐ Widowed ☐ Divorced

Continue to Next Page

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)** _____

Student/Spouse 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 you are married but filed separately, from your spouse in 2024, you both are required to consent. **If your and/or your spouse's 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(s) and all applicable schedules, or a 2024 IRS Tax Return Transcript(s).

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

- ☐ Single
- ☐ Head of Household
- ☐ Qualifying Widower
- ☐ Married Filing **Separately**
- ☐ Married Filing Jointly with **Former Spouse**
- ☐ Married Filing Jointly with **Current Spouse** (Skip to question 6)
- ☐ Did Not/Will Not File (see section 5a below)

a. If your 2024 tax filing status is different than your current marital status, provide an explanation:

_____

_____

5. What was **your spouse's** federal tax filing status for 2024?

- ☐ Single
- ☐ Head of Household
- ☐ Qualifying Widower
- ☐ Married Filing **Separately**
- ☐ Married Filing Jointly with **Former Spouse**
- ☐ Married Filing Jointly with **Current Spouse** (Skip to question 6)
- ☐ Did Not/Will Not File (see section 5a below)
- ☐ I am not married

a. **If you and/or your Spouse Did Not/Will Not File** a 2023 federal tax return, did you/they have any 2024 earnings?

☐ NO (enter N/A in section 5b) ☐ YES (proceed to 5b. below)

b. **If you or your spouse answered "YES" in section 5a. above**, provide the name of all employers for which you and/or your spouse 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

6. **List individuals in your household.**
Include:
- Yourself (student) and spouse (if married).
- Your children, if they will receive more than half of their support from you (and your spouse if married) between July 1, 2026, through June 30, 2027, even if the child does not live with you.
- Other people you now live with for whom you (and your spouse if married) provide 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 additional page if necessary.

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

Continue to Next Page

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 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 2025.

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