



Your 2020-2021 Free Application for Federal Student Aid (FAFSA) was selected for required verification. You must answer all questions below. Your financial aid processing will not be complete until you submit this Worksheet.

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

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

\_\_\_\_\_  
**Student Signature**

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

**Household Questions**

1. Select all of the following federal benefits received by any member of your family in 2018 or 2019. If no one in your family receives any of these benefits, select Not Applicable.
- Not Applicable
  - Medicaid/Supplemental Security Income (SSI)
  - Special Supplemental Nutrition Program for Women, Infant, and Children (WIC)
  - Supplemental Nutrition Assistance (SNAP)
  - Free or Reduced Price School Lunch
  - Temporary Assistance Needy Families (TANF)

2. **As of the time you filed the FAFSA**, what is your marital status?
- Single
  - Married/Remarried
  - Widowed
  - Separated
  - Divorced

Please provide the effective date of your marital status.

**If you are married, you MUST provide your spouse’s 2018 tax information on your 2020-2021 FAFSA.**

3. What was your federal tax filing status for 2018?
- Single
  - Married Filing Separate
  - Qualifying Widow(er)
  - Married Filing Jointly
  - Head of Household
  - Did Not File

If your 2018 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, 2020, through June 30, 2021, even if the child does not live with you **OR 2)** you would be required to provide your parental information if they completed a 2020-2021 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, 2021.

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 2020-2021 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>

**Financial Questions:**

1. What is your 2018 federal tax return filing status?
  - I filed my 2018 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 2018 Federal Tax Return Transcript – Obtain your 2018 tax return transcript at [www.irs.gov](http://www.irs.gov). Under Tools, select “Get my tax record”. DO NOT select “IRS Tax Account Transcript”.
  - I have an unexpired extension on my 2018 federal tax return.
  - I will not and was not required to file a 2018 federal tax return. You MUST provide Verification of Non-filing Letter from the IRS at [www.irs.gov](http://www.irs.gov) dated on or after October 1, 2019
2. If you are married, what is your spouse’s 2018 federal tax return filing status?
  - My spouse filed a 2018 federal tax return. You must provide his/her 2018 tax return transcript.
  - My spouse has an unexpired extension on his/her 2018 federal tax return.
  - My spouse will not and was not required to file a 2018 federal tax return. Your spouse MUST provide a Verification of Non-filing Letter from the IRS at [www.irs.gov](http://www.irs.gov) dated on or after October 1, 2019
3. If you OR your spouse (if applicable) will not file a 2018 federal tax return, did you/your spouse have earnings in 2018?
  - NO  YES

If you answered “YES”, provide the name of all employers for which you OR your spouse worked and your/your spouse’s 2018 earnings from each employer. You MUST provide a W-2 form for each employer listed.

Employer’s Name	Student/Spouse	Annual 2018 Earnings

**Information for Individuals with Special 2018 Tax Filing Considerations:**

**Unexpired 2018 Tax Filing Extension**

An individual who is required to file a 2018 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 2018.
- After October 16, 2018 a copy of the IRS’s approval of an extension beyond the six-month extension for tax year 2018.
- Verification of Non-filing Letter (confirmation that the tax return has not yet been filed) from the IRS dated on or after October 1, 2019.
- Copy of all W-2 forms for each source of income received for tax year 2018.
- 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 2018.

**Amended 2018 Tax Return**

An individual who filed a 2018 Federal Amended Tax Return, must provide all of the following documents:

- Signed copy of the 2018 IRS Form 1040X filed with the IRS and a copy of 2018 tax return transcript, OR
- Copy of the 2018 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 2018 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.