EdChoice & Cleveland Income Verification Helpful Tips

- **Tip #1: Establish an OH|ID account and complete the income verification process.** Find additional information in the [Income Verification Quick Guide.](#)
- **Tip #2: Use your child's name as it appears on their birth certificate:** Using a nickname or a shortened version of your child's legal name will delay review of the application.
- **Tip #3:** The person completing the Income Verification application is identified as "Head of Household" within the income system.
- **Tip #4: In the income verification system "Never Married" is the default setting.** Marital status can be adjusted by clicking the three blue dots next to your name.
- **Tip #5: Social Security Number (SSN 4):** The income verification system does not read the number zero. Numbers such as 7590 will be read as 759 and 0769 will be read as 769 in our system. You do not need to make any corrections to your SSN.
- **Tip #6: Adding Dependents:** Household size is determined using the tax filers and dependents listed on the tax returns provided. Add all household members to the Household Members section.
- **Tip #7: Income Verification and Acceptable Documentation**

The Parent/Guardian applying for the scholarship must submit Tax Returns as outlined below <u>OR</u> one of two available affidavits for income verification purposes:

TAX RETURNS
- <u>If Parent/Guardian filing status is Married Filing Jointly, upload one of the following:</u>
  - Page 1 of prior year Federal Form 1040 and any additional statement provided to the IRS if you have more than 4 dependents
  - Page 1 of prior year Ohio IT 1040 and the Ohio Schedule of Dependents page (Sequence No. 9)
  - Prior year federal Tax Return Transcript (www.irs.gov/individuals/get-transcript)

- <u>If Parent/Guardian filing status is Married Filing Separately, upload one of the following for both you and your spouse:</u>
  - Page 1 of prior year Federal Form 1040 and any additional statement provided to the IRS if you have more than 4 dependents
  - Page 1 of prior year Ohio IT 1040 and the Ohio Schedule of Dependents page (Sequence No. 9)
  - Prior year federal Tax Return Transcript (www.irs.gov/individuals/get-transcript)
    - *Note: forms must match; both federal or both Ohio*

- <u>If Parent Guardian filing status is Single, Head of Household, or Qualifying Surviving Spouse, upload one of the following for you and any unmarried partner / significant other if you reside together and share a child:</u>
  - Page 1 of prior year Federal Form 1040 and any additional statement provided to the IRS if you have more than 4 dependents
  - Page 1 of prior year Ohio IT 1040 and the Ohio Schedule of Dependents page (Sequence No. 9)
  - Your prior year federal Tax Return Transcript (www.irs.gov/individuals/get-transcript)
    - *Note: forms must match; both federal or both Ohio*

AFFIDAVITS IN LIEU OF TAX RETURNS

- **NOT REQUIRED TO PAY TAXES PER STATE AND FEDERAL LAW AFFIDAVIT**
  If Parent/Guardian and Spouse are not required to file a State or Federal Income Tax Return, they may upload a signed and notarized copy of the NOT REQUIRED TO PAY TAXES PER STATE AND FEDERAL LAW AFFIDAVIT available on the Scholarship website.
    o Enter $1 in the Amount (AMT) field

  OR

- **MINIMUM SCHOLARSHIP AWARD AFFIDAVIT**
  If Parent/Guardian wishes to be awarded the minimum EdChoice Expansion scholarship award, they may submit a signed and notarized copy of the MINIMUM SCHOLARSHIP AWARD AFFIDAVIT available on the Scholarship website.
    o Enter $999 in the Amount (AMT) field

Additional Notes:
  o If your income verification submission is made prior to the tax filing deadline of the current calendar year, you may provide your tax return for either of the two prior calendar years.
  o *Adjusted Gross Income (AGI)* is documented using Line 11 of the federal tax returns or Line 3 of the Ohio tax returns. AGI should be entered in the Amount (AMT) field.
  o *Household Size* is calculated by counting tax filers, spouses, and dependents listed on the tax returns.
  o Do not enter anything in the Amount (AMT) fields other than the numbers and a period.
  o Spousal Income must be included regardless of whether you share a child or not.
  o Significant Other's income must be included if you live together and have a child together.
  o Income documents must be uploaded in the Household Income section. The system will not allow you to submit the income verification without uploading supporting documentation.

Income Verification will not be recalculated after the review has been completed.

- **Tip #8: You must click the SUBMIT button (near the top right or bottom right of the screen) within your Income Verification for the Department to receive the application.** Once submitted, you will receive an email confirmation. The Department will review the income application and move it to Review Completed or Correction Needed status. If you receive a Correction Needed email because additional documents or corrections are needed to determine eligibility, please login to your account and review the comments identifying what needs to be done. **Once your corrections have been made, you must click the RESUBMIT button.**

Ohio Department of Education & Workforce