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## EdChoice Income Verification

If you are applying for an EdChoice Expansion scholarship for the first time, Income Verification is an additional step that must be done. Here is our latest guidance on how to do that:

1. Before you begin it would be helpful to prepare a PDF of page 1 of your 2022 Form 1040 tax return, and **black out all but the last 4 digits of all Social Security numbers**. You will (most likely) need this document later in the process.
2. You will be creating and logging into an online portal (OH|ID) to provide your financial information. Here's the link to a page that will help you get set up and logged in: <https://education.ohio.gov/Topics/Other-Resources/Scholarships/EdChoice-Scholarship-Program> See the section called "Important Updates"; there is also other helpful information included on this page.
3. Household Members: Use your child's name as it appears on their birth certificate. If you run into difficulties due to a child/student that is currently 18 (or approaching 18), see information at the end of this document on how to work around that.
4. Household Income: In the majority of cases you will simply be uploading page 1 of your 2022 Form 1040 as referenced above. (However, see exceptions listed in item 5.)
  - a. Name: Choose primary taxpayer
  - b. Income Source: Choose "Wages & Salaries"
  - c. Income Frequency: Choose "Annually"
  - d. Amount: Look at line 11 from your 2022 Form 1040 and put in this amount
  - e. Click "Save Income"
  - f. At this point you will see 3 green boxes next to the line you just entered; the first box will allow you to upload documents. Upload page 1 of your 2022 Form 1040.
    - i. If you have more dependents than will fit on the first page of the 1040, ALSO upload a supplemental sheet that lists the other dependents. (Make sure to black out the first 5 digits.)
    - ii. If you file "Married Filing Separately" then attach page 1 of each spouse's tax return.
5. Household Income – Exceptions: In some cases, your current income will be LOWER than what is reflected on your 2022 tax return (i.e., you may have lost your job in 2023). In that case, **DO NOT upload your Form 1040 tax return**. Choose an item from the Income Source drop-down that reflects your current income and attach the appropriate documentation. Since you will not be uploading your tax return, be sure that all Household Members are listed somewhere in the application: name, DOB, and last 4 of SSN.
6. Household Deductions: We recommend leaving this section blank.

Here are a few bullet points from a "Helpful Tips" document on the EdChoice website:

- The person completing the Income Verification is identified as "Head of Household" within the income system.

- “Never Married” is the default setting. Marital status can be adjusted by clicking the 3 blue dots next to your name.
- If you fall into an exception situation (see point 5), and are not uploading your tax return:
  - Spousal income must be included regardless of whether you share a child or not.
  - Significant Other’s income must be included if you live together and have a child together.
  - Do not enter anything in the numbers field other than the numbers and a period.
- You must click SUBMIT in order for ODE to receive the application. If they need additional information, they may put it into “Correction Needed” status. Once your corrections have been made you must click the RESUBMIT button.

**If you have a student/dependent that is 18:** How you proceed depends on whether you have other children who are under 18.

1. If you have one child/dependent who is 18+ and at least one other who is under 18:
  - a. Enter Household Members for everyone except the child who is 18+.
  - b. In the comment box beside one of the Household Members, enter the name, date of birth and last 4 SSN of the child who is 18+. (May be more than one.)
  - c. Upload your 1040 as outlined on the previous page.
  - d. You will be able to submit the Income Verification. The reviewer will add the dependents over 18 listed on the 1040. Allow 2 weeks for review.
2. If your only child/dependent is 18+:
  - a. Enter Household Members for the parent(s)
  - b. In the comment box beside one of the Household Members, enter the name, date of birth and last 4 SSN of the child who is 18+.
  - c. Upload your 1040 as outlined on the previous page.
  - d. Since you were not able to enter the student as a Household Member, you will not be able to actually submit the Income Verification. Here’s what to do:
    - i. Email [edchoice@education.ohio.gov](mailto:edchoice@education.ohio.gov) and request to have the child added to the Income Verification
    - ii. The email should also:
      1. Notify them that your only child is over 18
      2. State that you have uploaded your 1040
      3. State that you have put your child’s birthdate in the comments
      4. Include the first and last name of the parent completing Income Verification
    - iii. If all the necessary information is provided, an EdChoice team member will add the child(ren) who are over 18 and submit the application.

This document will be updated from time to time as we get further information.

Randy Steckel, WC Finance Director