

2025-2026 Special Cases Verification Instructions

Below are the instructions for required verification documents in special cases. Please contact us at (614) 251-4778 or finaid@ohiodominican.edu if you have any questions.

Joint Return Filers Who Are No Longer Married

An individual who filed a joint return and has separated, divorced, married someone else, or been widowed, will need to submit the following:

- A transcript obtained from the IRS or other relevant tax authority that lists 2023 tax account information of the tax filer(s); or
- A copy of the income tax return and the applicable schedules that were filed with the IRS or other relevant tax authority that lists 2023 tax account information of the tax filer(s); and
- A copy of IRS Form W-2 for each source of 2023 employment income received or an equivalent document.

Individuals Who Filed an Amended IRS Income Tax Return

An individual who filed an amended IRS income tax return for tax year 2023 must provide a signed copy of the 2023 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS or documentation from the IRS that includes the change(s) made by the IRS, in addition to one of the following:

- Income and tax information from the IRS on an ISIR record with all tax information from the original tax return;
- A **2023 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 2023 IRS Form 1040 and the applicable schedules that were filed with the IRS.

Individuals Granted a Filing Extension by the IRS

An individual who is required to file a 2023 IRS income tax return and has been granted a filing extension by the IRS beyond the automatic six-month extension for tax year 2023 must provide:

- A signed statement listing the sources of any 2023 income and the amount of income from each source;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension for tax year 2023;
- A copy of IRS Form W-2 for each source of employment income received or an equivalent document for tax year 2023; and
- If self-employed, a signed statement certifying the amount of the individual's adjusted gross income (AGI) and the U.S. income tax paid for tax year 2023.

Individuals Who Were Victims of IRS Tax-Related Identity Theft

An individual who was the victim of IRS tax-related identity theft must provide:

- A copy of the signed 2023 income tax return and applicable schedules the individual filed with the IRS, or an equivalent document provided by the IRS; *and*
- An IRS 4674C letter (a letter from the IRS acknowledging the identity theft) or a statement signed and dated by the tax filer indicating that he or she was a victim of IRS tax-related identity theft, and the IRS is aware of it.

Individuals Who Filed Non-IRS Income Tax Returns

- A tax filer who filed an income tax return with a tax authority other than the IRS may provide a signed copy of his or her income tax return that was filed with the relevant tax authority. However, if the institution questions the accuracy of the information on the signed copy of the income tax return, the tax filer must provide the institution with a copy of the tax account information issued by the relevant tax authority before verification can be completed.