



Tax-Aide Counselors - Please have TP and SP (if applicable) answer, and provide details for, the following questions that may affect the **2019** Ohio return.

_____ Your School District number or Name

https://www.tax.ohio.gov/online_services/thefinder.aspx

_____ Your Ohio county

YES NO UNSURE

- Did you live at your current address for the entire 2019 year?
- Did you pay School District, City, or Local income taxes last year or have any withheld from your W-2?
- Did you receive any interest/dividends from non-Ohio state/local governments?
- Did you make any withdrawals from an Educational Savings Plan (Ohio 529 Tuition Plan)? If yes, how much was for qualified higher-education expenses?
- If you had self-employment income (Sched C), what percentage was earned in Ohio? (i.e., exclude non-Ohio income)
- Did you receive any Federal interest/dividends exempt from Ohio taxation?
- Is part of your civil service pension based on time served in the US military? If so, what is your total time in government service and how much of that time was military service?
- Did you make contributions to an Educational Savings Plan (Ohio 529 Tuition Plan)?
- Did you receive Disability Benefits? Is the payer from an Ohio public employees' retirement system? If so, which one?
If payer is from a private retirement system, was the recipient under age 65 or under the minimum retirement age as set by the employer's plan?
- Did you receive Survivor Benefits? If so, was the employee retired at time of death?
If not, had employee reached retirement age according to employer's plan?
- Did you pay for Long-term Care Health Insurance?
- Did you purchase any health insurance from the insurance market place and/or did you purchase any health insurance for yourself or your family, other than what is available through your current/former employer or Medicare?
- Did you pay for re-training courses after being laid off?
- Did you contribute to a political campaign for an Ohio state office in 2019? Which political office did you contribute to and how much? _____
- Did you make any out-of-state purchases for which you owe Ohio sales tax? What is the total of those purchases? _____
- Did you make any **estimated** State, School District, City, or Local tax payments in 2019, or did you designate a portion of last year's refund to be applied to your 2019 taxes?

<p><u>Mail Payment and Voucher to:</u> Ohio Dept of Tax P.O. Box 182131 Columbus, OH 43218-2131</p>	<p><u>WHERE'S MY OHIO REFUND?</u> Go to: Tax.Ohio.gov or Call 800-282-1784 Provide your SS# and D.O.B.</p>	<p><u>To Pay Balance with Credit Card</u> Go to: Tax.Ohio.gov or Call 800-2PayTax Ohio code is 6446</p>
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