

Ohio SGO Donation Workflow & How to Claim the Credit

A simple step-by-step guide to donating to a certified Ohio Scholarship Granting Organization and claiming the Ohio tax credit

1 Before You Donate



Choose a certified Ohio SGO



Verify it is on the Ohio Attorney General's certified SGO list



Donations must be monetary

2 Donation Workflow



Choose a certified Ohio SGO



Make your donation



Receive and save your receipt



Keep records of the amount and date

3 How to Claim the Credit



Complete your Ohio return



Use Ohio IT 1040



Complete the Ohio Schedule of Credits



Report your eligible SGO donation credit



Keep or attach supporting documentation as required

4 Important Credit Reminders



Tax credit may be up to \$750 per taxpayer



Married filing jointly may claim up to \$1,500 if eligible



The credit cannot exceed your Ohio tax liability



Donations made during the tax year or by the unextended filing deadline may count if allowed under Ohio rules

5 What Records Should You Keep?



Donation receipt or acknowledgment



Name of the certified Ohio SGO



Donation amount



Donation date



A copy of your Ohio tax forms

6 Common Mistakes to Avoid



Donating to a non-certified organization



Losing your receipt



Assuming every donation automatically qualifies



Forgetting to complete the Schedule of Credits



Simple takeaway



+



+



+



=



Potential Ohio tax credit

Educational infographic only. Tax results depend on Ohio law and your personal tax situation.