

2023-2024 Head of Household Clarification Form

Student Name: _____

Student ID# _____

The financial aid application(s) (*CSS PROFILE* and/or *FAFSA*) you submitted contain unclear or conflicting information regarding your parent's "Marital Status" and "Tax Filing Status." The U. S. Department of Education requires the resolution of conflicting information prior to awarding federal aid. Please complete this form to help clarify.

The application indicates that your parents' "Marital Status" is Married and the "Tax Filing Status" is Head of Household. You are able to file as "Head of Household" if you meet all the following requirements*:

1. You are unmarried or "considered unmarried" on the last day of the year.
You are "considered unmarried" on the last day of the tax year if you meet **all** the following tests:
 - A. You file a separate return **and**
 - B. You paid more than half the cost of keeping up your home for the tax year **and**
 - C. Your spouse did not live in your home during the last 6 months of the tax year. Your spouse is considered to live in your home even if he or she is **temporarily** absent due to special circumstances **and**
 - D. Your home was the main home of your child, stepchild, or foster child for more than half the year **and**
 - E. You must be able to claim the child as a dependent. However, you meet this test if you cannot claim the child as a dependent only because the noncustodial parent can claim the child.
2. You paid more than half the cost of keeping up a home for the year.
3. A qualifying person lived with you in the home for more than half the year (except for temporary absences, such as school). However, if the qualifying person is your dependent parent, he or she does not have to live with you.

*You can review IRS Publication 17 at <https://www.irs.gov/pub/irs-pdf/p17.pdf> for more information of filing status.

Instructions:

1. **If the "Tax Filing Status" was an error please indicate and submit a signed 2021 IRS Tax Return Transcript (or signed 2021 U.S. IRS Form 1040) and a signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.**
2. **If the "Tax Filing Status" was NOT an error, please provide an explanation of how your parents qualified for this filing status as of 12/31/2021.**

Based on the IRS filing requirements, are you qualified to file "Head of Household"? Yes No

If Yes: please provide an explanation below.

If No:

1. Please amend your 2021 IRS 1040 and submit the 2021 IRS Tax Return Transcript (or signed 2021 U.S. IRS Form 1040) and a signed copy of the 2021 IRS Form 1040X to the Office of Student Financial Services.
2. What is your correct "Tax Filing Status"? Married filing jointly Married filing separately

Explanation:

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I (we) certify the information reported above is true and accurate to the best of my (our) knowledge. I (we) understand that providing misleading or false information can jeopardize financial aid eligibility and subject me (us) to federal penalties. If additional information is requested, I (we) agree to provide the institution with any supporting documentation to verify the information stated above. The student and at least one parent (for dependent students) must provide a signature. If you (the student) are independent, only the student signature is needed. We do not accept electronic signatures.

Student Name (Print)	Date	Student Name (Signature)
Parent 1 (Print)	Date	Parent 1 (Signature)
Parent 2 (Print)	Date	Parent 2 (Signature)