



## HEAD OF HOUSEHOLD VERIFICATION 2022-2023

**Please attach necessary documentation. We are unable to process incomplete or unsigned forms.**

STUDENT NAME: \_\_\_\_\_

STUDENT ID: B00 \_\_\_\_\_

Federal financial aid legislation requires aid administrators to review the validity of the tax filing status. We are requesting additional documentation as the FAFSA lists you or your parents as married and you or a parent have filed your tax return as Head of Household. Per the Internal Revenue Services (IRS) Publication 17, your tax filing status depends on whether you are considered unmarried or married. Generally, to qualify for Head of Household status you must be unmarried and not entitled to file as a qualifying widow, or widower with a dependent child. **You may qualify for Head of Household filing status if you meet the following three tests listed on IRS Form 886-H-HOH: Marriage Test, Qualifying Person Test, and Cost of Keeping up a Home Test.**

If your tax return was not self-prepared, you may submit a letter from a tax expert stating that the filing status is correct. Otherwise, please send photocopies of documentation from the chart below to support the Head of Household filing status for the 2020 tax year. **If you cannot, you will need to submit an amended tax return with a different filing status.** We cannot continue to process your financial aid until we have resolved the conflicting information.

|  |   |   |   |
|--|---|---|---|
| <b>Marriage Test</b>   | <b>If you are:</b>  |   | <b>Then send these documents:</b>   |
|  | Single  |   | Go to the Qualifying Person Test and Cost of Keeping up a Home Test.  |
|  | Divorced or legally separated   |   | Entire divorce decree, separate maintenance decree, or separation agreement.  |
|  | Married, but your spouse did not live with you during the last 6 months of the 2020 tax year.   |   | Documents verifying your spouse did not live with you during the last 6 months of the year, such as a lease agreement, utility bills, a letter from a clergy member, or a letter from social services.  |
| <b>Qualifying Person Test</b><br><i>(If your relationship with the child is not in this listing, please see Publication 501, Exemptions, Standard Deduction, and Filing Information for more information).</i> | <b>If the person is:</b>  | <b>And:</b>   | <b>Then send these documents:</b>   |
|  | Your child (including an adopted child, or a pending adoption),<br><br>Your brother or sister, stepbrother or stepsister, or any of their descendants (for example, grandchild, niece, or nephew),<br><br>Your eligible foster child (a child placed in your home by an authorized placement agency or by a court order). | You can claim a dependency exemption for the child.<br><br>The child lived in your home for more than half of the 2020 tax year (temporary absences away from home, such as time spent at school, count as time lived at home).<br><br>Note—A married child must be your dependent. | Birth certificates or other official documents of birth, marriage certificates, letter from an authorized adoption agency, letter from the authorized placement agency, or applicable court document that verify your relationship to the child (send these documents only for a qualifying child who is not your natural or adopted child).<br><br>To show both you and your child lived together for more than half of the 2020 tax year:<br>• send school, medical, daycare, or social service records<br>• send a letter on the official letterhead from a school, medical provider, social service agency, or place of worship that shows names, common address and dates. (If you send a letter from a relative who provides your daycare, you <b>MUST</b> send at least one additional letter.)<br><br>Send as many documents as necessary to show that the child lived with you for more than half of the year. |
| <b>Cost of Keeping Up a Home Test</b>  | <b>If:</b>  | <b>And:</b>   | <b>Then send these documents:</b>   |
|  | You pass both the marriage test and the qualifying person test,   | You paid more than half the cost of keeping up your home for the 2020 tax year.   | Rent receipts, utility bills, grocery receipts, property tax bills, mortgage interest statement, upkeep and repair bills, property insurance statement, and other household bills.  |