



OFFICE OF FINANCIAL AID

Head of Household Verification 2023-2024

Student Name: _____

ID# _____

Dear Parent:

Date: _____

On your 2021 Federal Income Taxes you have reported your tax filing status as Head of Household. However, based on information we have received in our office from your FAFSA or Verification Worksheet, we believe that your tax filing status may be incorrect.

According to IRS Publication 17 (2021: Part 1, Chapter 2, page 22-26) at <https://www.irs.gov/pub/irs-pdf/p17.pdf>, you may be able to file as Head of Household if you meet ALL of the following requirements:

1. You are unmarried or “considered unmarried” on the last day of the year. See Publication 17, page 22 and 24 for the definition of “considered unmarried”.
2. You paid more than half of 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 doesn't have to live with you.
4. Your home was the main home of your child, stepchild, or foster child for more than half the year. (See Home of qualifying person under Qualifying Person on page 25 for rules applying to a child's birth, death, or temporary absence during the year.)
5. You must be able to claim the child as a dependent. However, you meet this test if you can't claim the child as a dependent only because the noncustodial parent can claim the child using the rules described in Children of divorced or separated parents (or parents who live apart) under Qualifying Child in chapter 3, page 28-33, or referred to in Support Test for Children of Divorced or Separated Parents (or Parents Who Live Apart) under Qualifying Relative in chapter 3, page 33-37. The general rules for claiming a child as a dependent are explained in chapter 3.

In order for the Financial Aid Office to be able to complete your student's financial aid process we will need to receive:

- a. A signed, amended 2021 tax return showing the tax filing status updated to Married Filing Joint or Married Filing Separately. We will need to receive copies of the signed 2021 tax returns for both parents.
- b. A signed statement on company letterhead from a certified tax preparer stating that the tax filing status on your 2021 tax return was correct and does not need to be amended.

Please contact the Financial Aid Office to speak to a counselor regarding your financial aid information at (540) 365-4282.