

**2022-2023  
Verification of  
Head of Household  
Filing Status**



**Complete Form & Return via:**  
**Mail:** Office of Financial Aid  
 9201 University City Blvd. Charlotte, NC 28223  
**Fax:** (704) 687-1461  
**On Campus:** Niner Central, 380 Cone Center  
**Reminder:** No SSN can be accepted via email

The Department of Education requires verification of your parents' tax filing status. On your FAFSA you answered a question concerning your parents' marital status. Your FAFSA or other documents submitted indicate that your parents were married in 2020, but according to your parent income tax return they are filing "Head of Household". IRS Publication 17 states that a married person can only file income taxes as "Married Filing Jointly" or "Married Filing Separately" unless other circumstances exist. Complete **ALL** sections and return this form with supporting documentation to the Office of Financial Aid. **Please review these rules from IRS Publication #501 (page 8) to determine who can file a 2020 IRS form as "Head of Household".** <https://www.irs.gov/pub/irs-pdf/p501.pdf>

Student Name: \_\_\_\_\_ Student ID: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

- You were eligible to file as "Head of Household" if you met ALL the following requirements.**
1. You are unmarried or considered unmarried on the last day of the calendar year.
  2. You paid more than half the cost of keeping up a home for the year (there is a worksheet in the tax guide).
  3. A qualifying person lived with you in the home for more than half the year (except for temporary absences such as attending school).

**Section A: Parent Current Marital Status**

**Current Marital Status:** (circle one)    Divorce                                  Married                                  Separated

Date of current marital status (MM/YYYY): \_\_\_\_\_

**Section B: Parental Information**

To qualify for *Head of Household* status, you must have been either unmarried or considered unmarried on the last day of the calendar year.

1) Your spouse didn't live in your home during the last 6 months of the 2020 tax year. Your spouse is considered to live in your home *even if* he or she is temporarily absent due to special circumstances. See *Temporary Absences* in the IRS publication link provided above for clarification (page 9).

Please provide the address where each parent lived for the last 6 months of 2020. Include the street, apartment number, city, state, zip code. **You must provide a dated 2020 utility bill from each parent between June-December 2020.** Post Office Boxes are not acceptable addresses for this purpose.

Parent 1 Information	Parent 2 Information
Name:	Name:
Address:	Address:

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2) Did you file a separate tax return?

Parent 1:    Y        N                      2020 Filing Status: \_\_\_\_\_  
Parent 2:    Y        N                      2020 Filing Status: \_\_\_\_\_

3) Did you pay more than half the cost of keeping up your home for the tax year?

Parent 1:    Y        N  
Parent 2:    Y        N

4) You must have been able to claim a qualifying person as a dependent.

*A qualifying person is your child (including an adopted child, or a pending adoption), Your brother or sister, stepbrother or stepsister, or any of their descendants (for example, grandchild, niece, or nephew), 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. The child lived in your home for more than half of the year (temporary absences away from home, such as time spent at school, count as time lived at home) or a married child must be your dependent.*

Parent 1:    Y        N  
Dependent Name: \_\_\_\_\_ Relationship to parent: \_\_\_\_\_

Parent 2:    Y        N  
Dependent Name: \_\_\_\_\_ Relationship to parent: \_\_\_\_\_

5) Was your home the main home of your child, stepchild, or foster child for more than half the year?

Parent 1:    Y        N  
Parent 2:    Y        N

**Section C: Certification**

\_\_\_\_\_ I understand that if I am unable to provide the requested documentation I will need to amend my (and/or my spouses) 2020 tax return and provide a copy of the amended return to the Office of Financial Aid.

\_\_\_\_\_ I certify that the information I have reported for federal student aid is complete and accurate. I understand that additional information may be required if this form is incomplete, if documentation is missing, unclear, or insufficient, or if additional questions arise based on the information provided.

**Warning: According to the U.S. Department of Education, if you purposely give false or misleading information you may be subject to a fine of up to \$20,000, face imprisonment, or both.**

Student signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent signature: \_\_\_\_\_ Date: \_\_\_\_\_