

**2025-2026 Head of Household
Verification Form**



Complete Form & Return via:
Mail: Office of Financial Aid
 9201 University City Blvd. Charlotte, NC 28223
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 2023, 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 to determine who can file a 2023 IRS form as "Head of Household".** <https://www.irs.gov/pub/irs-prior/p501--2023.pdf>

Student Name: _____

Student ID: _____

You were eligible to file as "Head of Household" if you met ALL the following requirements.	<ul style="list-style-type: none"> ✓ You are unmarried or considered unmarried on the last day of the calendar year. ✓ You paid more than half the cost of keeping up a home for the year (there is a worksheet in the tax guide). ✓ A qualifying person lived with you in the home for more than half the year (except for temporary absences such as attending school).
IRS definition of unmarried or considered unmarried	<ul style="list-style-type: none"> ✓ Unmarried: Legally separated from your spouse under a divorce or separated maintenance decree or annulled marriage (a court decree of annulment) ✓ Considered Unmarried: Your spouse didn't 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. See Temporary Absences in the IRS publication link https://www.irs.gov/pub/irs-prior/p501--2023.pdf

➔ To determine if you qualify complete the following:

Please provide the address where each parent lived for the last 6 months of 2023. Include the street, apartment number, city, state, zip code. Post Office Boxes are not acceptable addresses for this purpose.	You must provide a dated 2023 utility bill from each parent between June-December 2023	
	Parent 1: Name: _____ Address: _____	Parent 2: Name: _____ Address: _____
Were you married as of December 31, 2023 – or were they considered separated/divorced as of December 31, 2023?	<input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated	<input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated
Did you file a separate tax return? (Select filing status on your 2023 taxes)	<input type="checkbox"/> MFS: Married Filing Separated <input type="checkbox"/> HOH: Head of Household <input type="checkbox"/> Single	<input type="checkbox"/> MFS: Married Filing Separated <input type="checkbox"/> HOH: Head of Household <input type="checkbox"/> Single
Did you pay more than half the cost of keeping up your home for the tax year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
You must have been able to claim a qualifying person as a dependent.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Was your home the main home of your child, stepchild, or foster child for more than half the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

➔ If you **do not meet the above requirements** to have filed a 2023 IRS income tax return as "Head of Household", your must re-file for 2023 and submit both parents amended signed 2023 IRS income tax returns (1040x) for verification to proceed.

Certification (Initial to acknowledge)

_____ I understand that if I am unable to provide the requested documentation, I will need to amend my (and/or my spouses') 2023 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: _____