



Tax Filing Status Worksheet (Independent Student)

Student Name _____ Student ID _____

You and your spouse have both filed as head of household on your US Tax Return for 2023. Per IRS tax filing rules, in order for this to be acceptable, the following must apply.

Who is Head of Household?

Taxpayers may qualify for the Head of Household filing status, if they:

- Are unmarried or “considered unmarried” on the last day of the tax year, **and**
- Paid more than half the cost of keeping up a home for the required period of time, **and**
- Had a qualifying person living in their home for more than half the year (except for temporary absences, such as school)

This particular rule can be found on [irs.gov](https://www.irs.gov).

This issue must be resolved in order to determine an accurate financial aid package for which you are eligible has been or will be offered. If an aid package has already been offered, the aid may be cancelled until resolution is achieved.

Section A: Resolution Options

- _____ I and/or my spouse will provide an official statement from a tax preparer confirming that both parties were eligible to file as head of household on their 2023 US Tax Return. The statement must refer to the tax regulations that were applicable for use in this situation.
- _____ I and/or my spouse will amend the 2023 US Tax Return, based on above tax regulations. A signed copy of the amended return will need to be submitted to the Office of Financial Aid and Scholarships. A correction will then be made to your 2025-2026 FAFSA to reflect the correct tax filing status for that person(s). If applicable, the tax information will also be corrected. If you have already received a financial aid package, it will be reviewed for accuracy based on the corrected FAFSA and the newly calculated Student Aid Index (SAI). If you have not yet been offered a financial aid package, you will be offered the most accurate aid package for which you are eligible after the issue is resolved.

Section B: Certification and Signatures

As certified by the signatures below, all of the information provided on this form is true and complete to the best of my knowledge. I understand that the Office of Financial Aid and Scholarships may request additional documentation to verify the above information.

Electronic Signatures Will Not Be Accepted

Student's Signature _____ Date _____