

2020-2021
Verification of Student's
Marital and/or Tax Filing Status

A. Student & Parent Information

Student's Name: _____ MPC ID: _____

B. Information & Instructions

Your 2020-2021 FAFSA application has been identified by the U.S. Department of Education for potentially containing conflicting information between your marital status and tax filing status **or** your 2020-2021 California Dream Act Application has been identified by the California Student Aid Commission (CSAC) for potentially containing conflicting information between your marital status and tax filing status.

If necessary, logon to FAFSA at fafsa.ed.gov or California Dream Act Application at <https://dream.csac.ca.gov/> and make the proper corrections to your marital status and tax filing status. Please complete both sides of this form and return it to the Financial Aid Office only if you feel that the FAFSA application is accurate and does not need to be corrected. Federal Regulations require that institutions verify the accuracy of this data and to resolve any conflicting information.

- Note:** The Financial Aid Office at Monterey Peninsula College (MPC) **cannot** proceed with processing and packaging
- your award until all required financial aid documents are submitted and conflicting information is resolved.
 - Based on the information provided on this form, the Financial Aid Office will update your 2020-2021 FAFSA or California Dream Act application accordingly.

C. Verification of Student's Marital Status & Tax Filing Status – To be completed by student

In the table below, please specify the following for your parent(s):

- Marital status of the date the student first completed their 2020-2021 aid application **and**,
- Tax filing status as listed on their 2018 U.S. Individual Income Tax Return

Please indicate what your marital status was as of the date you first completed the 2020-2021 aid application	Please indicate what your tax filing status is as listed on your 2018 U.S. Individual Income Tax Return
<ul style="list-style-type: none"> • Single or Unmarried 	<ul style="list-style-type: none"> • Single • Head of Household • *Other: _____
<ul style="list-style-type: none"> • Married or Re-Married Date Married/Re-Married: _____	<ul style="list-style-type: none"> • Single • Married Filing Jointly • Married Filing Separately • Head of Household • *Other: _____
<ul style="list-style-type: none"> • Divorced or Separated Date Divorced/Separated: _____	<ul style="list-style-type: none"> • Single • Head of Household • *Other: _____
<ul style="list-style-type: none"> • Widowed Date Widowed: _____	<ul style="list-style-type: none"> • Single • Married Filing Jointly • Head of Household • Qualifying Widower • *Other: _____

***If other** is checked above for any of the tax filing statuses, there may be conflicting information that requires resolution.

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D. Head of Household Eligibility – To be completed by student

According to [IRS Publication 17](#), an individual may be able to file as head of household if they meet **all** the following requirements:

1. You are unmarried or “considered unmarried” on the last day of the year.
2. You paid more than half 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).

If you are legally married and filed your taxes as Head of Household for 2018, you may need to file an amended tax return (form 1040X) reflecting the correct filing status. If your tax professional indicated that you were eligible to file as head of household (despite being married); please continue to complete this form and, if available, provide a statement from your tax professional on their company letterhead.

Initial next to each of the following requirements, only if the requirement is applicable to your tax filing circumstances.

Considered Unmarried Eligibility Requirements

- _____ You filed a separate return.
- _____ You paid more than half the cost of keeping up your home for the tax year.
- _____ Your spouse did not 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.
- _____ Your home was the main home of your child, stepchild, or foster child for more than half the year.
- _____ You must be able to claim an exemption for the child. However, you meet this test if you cannot claim the exemption only because the non-custodial parent can claim the child.

Head of Household Eligibility Requirements

- _____ You were married but considered unmarried on December 31, 2018 (If you initialed all of the previous criteria initial here)
- _____ You paid more than half the cost to keeping up your home for the tax year.
- _____ 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 does not have to live with you.

E. Personal Statement – Explain in detail why you were allowed to use that filing status given your marital status and, if available, please provide a letter of explanation from your tax preparer or the IRS.

F. Certification and Signatures – Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student whose information was reported on the FAFSA must sign and date. Warning! If you purposely give false or misleading information you may be fined, sentenced to jail, or both.

Student Signature: _____ Date: _____

Spouse Signature: _____ Date: _____
(optional)

This worksheet must be signed and dated to be valid. Electronic and/or digital signatures are not valid.

For Office Use Only

Processed By: _____	Date: _____
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