2016 – 2017 Verification of ‘Head of Household’ Filing Status

You and/or your parent(s) reported a tax filing status for 2015 of “Head of Household” and also indicated a marital status other than ‘single’ on the Free Application for Federal Student Aid (FAFSA). According to the IRS tax code, individuals who are eligible to file with the filing status of “Head of Household” are usually not married; however, there are exceptions to this rule. As such, please complete this form to determine if an exception applies.

SECTION 1: IDENTIFICATION

Student Name: ____________________________ Roosevelt ID #: __________

SECTION 2: STUDENT OR PARENT CERTIFICATION

DEPENDENT STUDENTS ONLY: Check “yes” or “no” for each question.

1. Your parents filed separate tax returns: YES ☐ NO ☐
2. Your parent paid more than half the cost of keeping up their home for the 2015 tax year: YES ☐ NO ☐
3. Your parent’s spouse did not live in the house the last six (6) months of the 2015 tax year (do not include temporary absences such as military leave or school absence): YES ☐ NO ☐
4. Your parents’ home was the main home of their children, including you, stepchildren, or foster children for more than half of the year: YES ☐ NO ☐
5. Your parent was able to claim an exemption for the child. You may still be eligible even if the noncustodial parent can claim the child under other IRS support test. (For further guidance, your parents should consult their tax preparer.) YES ☐ NO ☐

INDEPENDENT STUDENTS ONLY: Check “yes” or “no” for each question.

1. You filed separate tax returns: YES ☐ NO ☐
2. You paid more than half the cost of keeping up your home for the 2015 tax year: YES ☐ NO ☐
3. Your spouse did not live in the house the last six (6) months of the 2015 tax year (do not include temporary absences such as military leave or school absence): YES ☐ NO ☐
4. Your home was the main home for your children, stepchildren, or foster children for more than half of the year: YES ☐ NO ☐
5. You were able to claim an exemption for your child. You may still be eligible even if the noncustodial parent can claim the child under other IRS support test. (For further guidance please consult your tax preparer.) YES ☐ NO ☐

If you or your parent(s) answered no to any of these questions, but filed as “Head of Household,” you or your parent(s) must seek guidance from a tax preparer or the IRS on amending your 2015 Federal Tax Return. Contact the Office of Financial Aid for further instructions regarding the submittal of an amended tax return.

SECTION 3: CERTIFICATION AND SIGNATURE

By signing this form, I certify the information on this form and any attachments are accurate and complete to the best of my knowledge. If requested, I agree to provide documentation to support the information I have provided on this form. I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and I may be subject to a fine, imprisonment or both, under provisions of the United States Criminal Code.

Student Signature ____________________________ Date __________

Parent Signature ____________________________ Date __________

Submit this worksheet in person, by email to: finaidforms@roosevelt.edu, or by fax: (312) 341-3545