

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

Name: Last

First

UID#

☐ **Check this box if you plan to enroll for Summer 2020** (a separate Summer Aid Application is Required)

Your 2020-2021 FAFSA application has been identified by the Department of Education for potentially containing conflicting information between your Marital Status and Tax Filing Status.

**Log on to FAFSA.gov and make the proper corrections to your marital status and tax filing status.**

Please complete this form and return it to the Financial Aid and Scholarships 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 resolve any conflicting information.

### Verification of Student Marital Status and Tax Filing Status

**Please Note:**

- UCLA Financial Aid and Scholarships cannot proceed with processing your awards until all required Financial Aid documents are submitted and conflicting information is resolved.
- Your 2020-2021 FAFSA will be updated, as needed, based on the information provided on this form.
- Your tax filing status selection must be in the corresponding box, if you do not see it, select "Other."

What is your Marital Status as of the date you completed the 2020-2021 FAFSA.	Please indicate your tax filing status as stated on your 2018 Federal Tax Return.
<input type="checkbox"/> Single or Unmarried	<input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Other*
<input type="checkbox"/> Married or Re-Married Date of Marriage: _____	<input type="checkbox"/> Married Filing Joint Return <input type="checkbox"/> Married Filing Separate Return (You must report both your and your Spouse's income on the FAFSA) <input type="checkbox"/> <b>Head of Household ** (Special circumstances only Continue to page 2 of this form if this is selected)**</b> <input type="checkbox"/> Other*
<input type="checkbox"/> Divorced or Separated Date of Divorce or Separation: _____	<input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Other*
<input type="checkbox"/> Widowed Date Widowed: _____	<input type="checkbox"/> Single <input type="checkbox"/> Married Filing Joint (Additional documents may be required) <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Widower (By Checking this box you certify you are a qualifying widower and have provided only the surviving spouse's income on the FAFSA) <input type="checkbox"/> Other*

\*If you answered "Other" to any of the tax filing statuses above, there may be conflicting information that requires resolution. Please specify what your tax filing status was and **attach** a letter that explains why you were allowed to use that filing status given your marital status. Please provide a letter of explanation from your tax preparer or IRS, if available.

### Head of Household Eligibility

If you are legally married and filed your taxes as Head of Household for 2018, you may need to file an amended tax return (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.

**Only complete the following section, if you are legally married and filed a 1040 or 1040A as Head of Household.**

#### Considered Unmarried: Eligibility Requirements

For tax purposes, you may be Married but considered "Unmarried" if you meet **All** of the following requirements. \*\*See IRS Publication 17\*\*

**INITIAL** each of the following requirements below **Only** if the requirement is applicable to your tax filing circumstances.

- \_\_\_\_\_ You filed a separate return.
- \_\_\_\_\_ You paid more than half the cost to 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 circumstance.
- \_\_\_\_\_ 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 may be eligible to file head of household if you meet the requirements below. By initialing next to each requirement you are certifying that you meet this requirement. \*\*See IRS Publication 17\*\*

**INITIAL** each of the following requirements below **Only** if the requirement is applicable to your tax filing circumstances.

- \_\_\_\_\_ 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 of 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.

#### CERTIFICATION STATEMENT

I certify that all the information reported on this form is complete and accurate. I understand that I may be required to provide additional documentation. Purposely providing false or misleading information on this worksheet, may result in an investigation by the Inspector General for Student Aid Fraud.

Student Signature\* \_\_\_\_\_ Date \_\_\_\_\_

*\*Electronic signatures are not acceptable*

#### HOW TO SUBMIT

<p><b>Online</b></p> <p>Log on to MyUCLA&gt;click on Finances and Jobs tab&gt; under Financial Aid and Scholarships click&gt;View all documents. Attach form as necessary.</p>	<p><b>Fax:</b></p> <p>Fax: 310-267-4143 Attn: UCLA Financial Aid and Scholarships</p>	
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