



MOUNT ST. JOSEPH
UNIVERSITY®

Mount St Joseph University
Student Administrative Services
Office of Financial Aid

2022-2023 Spouse Marital Status and/or Tax Filing Status Resolution

Student Last Name

Student First Name

Student ID Number

Spouse Last Name

Spouse First Name

Last 4 of Spouse Social

Verification of Parent Marital Status and Filing Status (To be Completed by Spouse)

Please Note:

- Mount St Joseph University cannot proceed with processing your aid until all required Financial Aid Documents are submitted and conflicting information is resolved.
- Your FAFSA may be updated to reflect the documentation provided.
- 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 2022-2023 FAFSA?	Please indicate your tax filing status as stated on your 2020 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 Remarried Date of Marriage: _____	<input type="checkbox"/> Married Filing Joint <input type="checkbox"/> Married Filing Separate <input type="checkbox"/> Head of Household ** (Special Circumstances only. Continue to page 2 of this form if selected) <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 Documentation 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 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 file given your marital status. Please provide a letter of explanation from your tax preparer or IRS, if available.

****HEAD OF HOUSEHOLD ELIGIBILITY – Only complete this section if you selected Married and Head of Household for your filing status. If you selected any other Marital Status/Filing Status combination, skip to the signature section.**

If you are legally married and filed your taxes as Head of Household for 2020, 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. **Initial** each of the following requirements below, **only** if the requirement is applicable to your tax filing circumstances.

Only complete the following section if you are legally married and filed your 2020 Tax Return 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****

You filed a separate return.

You paid for **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 living 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****

You were Married, but considered “Unmarried” on December 31, 2020. (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.

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 provided false or misleading information on this worksheet may result in an investigation by the Inspector General for Student Aid Fraud.

Student Signature

Date

Spouse Signature

Date