



2023-2024

MARITAL/TAX FILING STATUS DISCREPANCY FORM

****INDEPENDENT STUDENT****

The Department of Education requires Financial Aid Administrators to verify your marital and tax filing status when conflicting information appears to be present. On your 2023-2024 FAFSA, you answered questions concerning your marital and tax filing status that are in conflict with each other, IRS tax regulations, and/or other information presented to our office. To clear this conflict of information, additional documentation will be required to process your file. The Department of Education regulations do not allow our office to continue processing or award aid until the conflicting information is resolved. **Please note:** Additional documentation not listed below may be requested or necessary for processing.

SECTION I: STUDENT INFORMATION

Last Name	First Name	M	Student ID number

SECTION II: STUDENT MARITAL-TAX FILING DISCREPANCY CONFIRMATION

INSTRUCTIONS: Review the scenarios below and best describes your marital status in 2021-select only ONE box-then provide the requested documentation associated with your marital status.

OPTION 1-UNMARRIED IN 2021: For purposes of this form, this status is normally for taxpayers who are unmarried or divorced as of filing your taxes for the 2021 tax year. This is not the same as being “considered unmarried” for tax purposes. See below for that option.

This selection means you were unmarried in 2021, but have had a change in marital status since filing your taxes for 2021 (before FAFSA was completed). As a result, the following documentation is necessary to review and process your file and clear the marital and tax status conflict:

- 1) Submit a copy of your marriage license or divorce decree (whichever applies)
- 2) Submit a V1 Verification Worksheet
- 3) Submit a 2021 Tax Return Transcript for both you and your spouse (if married). Even though you did not file taxes as “married” during 2021, the FAFSA requires the income information to be completed based on your marital status as of the date you completed the FAFSA

OPTION 2-“CONSIDERED MARRIED” IN 2021: For tax filing purposes, you may be a married person and are “considered married” for the whole year if, on December 31, 2021, you and your spouse met ANY ONE of the following criteria (2021 IRS Publication 17, Part 1, Section 2). **Check any of the following selections that you can answer “YES” to:**

- 1) You are married and living together Yes No
- 2) You are living together in common law marriage that is recognized in the state where you now live **or** in the state where the common law marriage began Yes No
- 3) You are married and living apart, but not legally separated or under a mutual separation agreement Yes No
- 4) You are separated under an interlocutory (not final) decree of divorce Yes No

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OPTION 2 CONTINUED FROM PAGE 1**OPTION 2-"CONSIDERED MARRIED" IN 2021:**

If you answered **"YES"** to any one of the questions in Option 2 above, that means you are considered married and were not eligible to file a 2021 IRS income tax return as "Head of Household" or "Single". If you wish to receive financial aid, you can file an amended 2021 tax return to the IRS and send the items below to the Office of Financial Aid:

- 1) A signed and completed copy of this 2023-2024 Student Marital-Tax Filing Status Discrepancy Form
- 2) A signed, amended IRS 2021 Tax Form (1040X)
- 3) A 2021 Tax Return Transcript for student and/or spouse (if not already submitted to our office)
- 4) A signed & completed 2023-2024 V1 Verification Worksheet (if not already submitted to our office)

OPTION 3-"CONSIDERED UNMARRIED" IN 2021 (HEAD OF HOUSEHOLD FILING): For tax filing purposes, you may be "considered unmarried" on the last day of the tax year and qualify for Head of Household filing status (2021 IRS Publication 17, Part 1, Section 2). **To qualify for Head of Household status, you must be able to check ALL of the following criteria.**

- You filed a separate tax return from your spouse **Yes**
- You paid more than half of the cost of keeping up your home for the 2021 tax year **Yes**
- Your spouse did not live in your home during the last 6 months of the tax year (June 2021-December 2021)-temporary absences, such as illness, education, business, military service, vacation, etc., are excluded **Yes**
- Your home was the main home of your child, stepchild, or foster child for more than half the tax year (June 2021-December 2021) **Yes**
- You must be able to claim the child as a qualifying dependent **Yes**

"NO" - If you answered to any of the requirements above, please refer back to **Option 2** and submit items requested.

"YES" - If you were able to answer yes to all of the criteria above, you are "considered unmarried" by the IRS, and you were eligible to file your 2021 Federal Income Taxes as "Head of Household". The following documentation is necessary to review and process your file and clear the marital and tax status conflict:

- 1) Submit a signed statement on letterhead or supporting documentation from your tax preparer or IRS that verifies that you are eligible to file as Head of Household
 - If your taxes were self-prepared, skip below to 'Proof of Separation for Head of Household Filing Status in 2021' section below (you must still submit items 2, 3, and 4)
 - If you are unable to get a letter from a tax preparer or IRS, skip below to 'Proof of Separation for Head of Household Filing Status in 2021' section below (you must still submit items 2, 3, and 4)
- 2) Submit signed & completed copy of this 2023-2024 Student Marital-Tax Filing Status Discrepancy Form
- 3) Submit a V1 Verification Worksheet (if not already submitted to our office)
- 4) Submit a 2021 IRS Tax Return Transcript (if not already submitted to our office)

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OPTION 3 CONTINUED FROM PAGE 2**OPTION 3 - "CONSIDERED UNMARRIED" IN 2021:****PROOF OF SEPARATION FOR HEAD OF HOUSEHOLD FILING STATUS IN 2021:**

Because you self-prepared your taxes and/or your tax preparer is not able to provide you a letter, our office will review documents for Head of Household filing status in 2021. As a result, the following documentation is necessary to review and process your file and clear the marital and tax status conflict:

- A copy of your legal separation document, or pending divorce decree. If you are not legally separated or pending a divorce, please submit a Statement of Fact explaining your marital and tax status for both 2021 and currently (as of the date of this form)-be sure to be detailed and include dates and specifics.
- Proof of your physical address (no P.O. Box) as well as proof of your spouse's physical address (such as copy of lease, mortgage statement, utility bills) from June 2021 through December 2021 (as you must have been separated during the last 6 months of the tax year). Please provide separate proof for each month you were separated-June, July, August, September, October, November, and December.

OPTION 4-WIDOWED IN 2021: For tax filing purposes, taxpayers whose spouses died during the tax year are considered married for the entire tax year provided they did not remarry. The surviving spouse is eligible to file as Married Filing Jointly or Married Filing Separately.

If you were widowed in 2021, but could have filed as married for the 2021 tax year, or you have become widowed since filing your taxes, the following documentation is necessary to review and process your file and clear the marital and tax status conflict:

- 1) Submit a copy of the death certificate for your spouse
- 2) Submit a V1 Verification Worksheet
- 3) Submit a 2021 IRS Tax Return Transcript for both you and your spouse-even though you may not have filed taxes as widowed during 2021, the FAFSA requires you to report your current marital status as of the date you completed your FAFSA
- 4) Submit 2021 W-2s and/or 1099 Forms for you and your spouse- verification of both incomes allows us to see your spouse's income so that we can exclude it on your FAFSA

OPTION 5-OTHER IN 2021: Check this box if you do not see a marital or tax status on this form that represents you and/or your spouse's circumstances.

The following documentation is necessary to review and process your file and clear the marital and tax status conflict:

- Submit a completed, signed copy of the Statement of Fact Form explaining your marital and tax status for both 2021 and currently (as of the date of this form)-be sure to be detailed and include dates and specifics

NOTE: If you selected this option, an additional review by our office is necessary. Until we receive your statement, and it is reviewed, we are unable to determine what additional documentation is needed. This option may include delays in processing.

SECTION III: REQUIRED SIGNATURES (NOTE: We do not accept electronic signatures)

I understand that by signing this form I agree, if asked, to provide information that will verify the accuracy of the completed form. Also, I certify that I understand that **Victor Valley College's Office of Financial Aid has the authority to verify information reported with other federal and state agencies.** I certify that the information provided is true and correct and declare, under penalty of perjury, and that it will be used to determine your financial aid eligibility in accordance with federal regulations.

Student Signature

Date signed

Spouse's Signature (if applicable)

Date signed

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined \$20,000, sentenced to prison, or both.

NOTE: THIS FORM WILL NOT BE ACCEPTED AS COMPLETE UNLESS REQUIRED ADDITIONAL DOCUMENTATION IS ALSO SUBMITTED

THE OFFICE OF FINANCIAL AID IS NOW PAPERLESS!

HOW TO SUBMIT YOUR DOCUMENTATION:

The Office of Financial Aid is a **paperless office** and documents should be submitted electronically. There are a few documents that must be submitted in person, or must be notarized and mailed into VVC for processing. Inside your Self-Service Portal, under Financial Aid, be sure that you read and follow the instructions listed with each required document. The document instructions inside of self-service for each document will direct you how to submit the documents and what method to use when submitting.

Please submit/upload completed documents via VVC Self-Service using the following steps:

- 1) **To view documents being requested or to upload documentation**, please log into your MyVVC account at: <https://launchpad.classlink.com/vvc> and click on the Self-Service option.
- 2) Once inside Self-Service, click on "Financial Aid". You will then see a message that states, "**You have missing documents**".
- 3) Using the hyperlink for "**complete required documents**", review the list of items requested. You can upload a document by clicking the paperclip under the "**Attachment**" column and uploading the requested document there for each corresponding item.
- 4) Once you upload your documentation, **please allow up to 45 days** for review and processing of your documents (with the exception of the SAP Appeal, which has a different processing flow).
- 5) **Check your VVC student email often!** If we need you to submit another item, or correct an item that you uploaded, we will contact you via your VVC student email. In order to keep your spot in line for processing, please respond timely.