

THE UNIVERSITY OF OKLAHOMA
STUDENT FINANCIAL CENTER
1000 Asp Avenue, Room 105
Norman, Oklahoma 73019-4078
Phone (405) 325-9000 Fax (405) 325-7608
sfc@ou.edu

HEAD OF HOUSEHOLD VERIFICATION 2023-2024

Student Name: _____ Date: _____

Last 4 SSN#: _____ Sooner ID #: _____

Dear Parent,

On your 2021 Federal Income Taxes you have reported your tax filing status as Head of Household. However, based on additional information we have received in our office from your FAFSA or Verification Worksheet, we believe your tax filing status may be incorrect.

According to IRS Publication 501 and Publication 17 (available online at www.irs.gov) you may be able to file as Head of Household if you 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 of 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).
4. To be "considered unmarried" you MUST also:
 - a. Have filed a separate return.
 - b. Paid more than half the cost of keeping up your home for the tax year.
 - c. Your spouse did not live in your home for the last 6 months of the tax year. Your spouse is considered to live in your home even if he/she is temporarily absent due to special circumstances.

For the Student Financial Center to be able to complete your student's financial aid process, we will need to receive:

- a. An amended 2021 tax return showing the tax filing status updated to Married Filing Jointly or Married Filing Separately. We would need to receive copies of both signed 2021 amended tax returns.
- b. A signed statement on company letterhead from a certified tax preparer stating that the tax filing status on your 2021 tax return was correct and does not need to be amended.

Please contact the Student Financial Center at 405-325-9000 to speak to a counselor regarding your financial aid information.

Sincerely,

Student Financial Center
University of Oklahoma