



Financial Assistance Office
Sauk Valley Community College
Marital Status/Tax Filing Verification
2023-2024

Name: _____ ID # @ _____

According to your 2023-2024 FAFSA, either you or your parent may have used an incorrect tax filing status on your 2021 federal tax return.

What does this mean? What should I do next?

First, determine if a taxpayer listed on the FAFSA (you or your parent) used an incorrect tax filing status on their 2021 federal tax return:

- **Single.** This status is for taxpayers who **aren't married**, or who are divorced or legally separated under state law. *Limited exceptions apply*
- **Married Filing Jointly.** If taxpayers are married, they can file a joint tax return. If a spouse died in 2021, the widowed spouse can often file a joint return for that year.
- **Married Filing Separately.** A married couple can choose to file two separate tax returns.
- **Head of Household.** In most cases, this status applies to a taxpayer who is not married and meets special rules. *Limited exceptions apply*
- **Qualifying Widow(er) with Dependent Child.** This status may apply to a taxpayer if their spouse died during 2019 or 2020 and they have a dependent child. Other conditions also apply.

A full explanation of each filing status can be found at www.irs.gov by reviewing IRS Publication 501 (page 5) and IRS – What Is My Filing Status?

1. What should be done if a taxpayer INCORRECTLY filed as Single or Head of Household because the taxpayer was not divorced or legally separated? Complete steps 1a – 1c.

The 2021 tax return must be corrected before our office can complete your financial aid review.

1a. Use Form 1040-X to correct the 2021 federal tax return (s) using either Married Filing Joint, or Married Filing Separate for the new tax filing status.

1b. Submit a **signed** copy of any Form 1040-X submitted to the IRS.

1c. Submit a **signed** copy of the original 2021 Federal 1040 submitted to the IRS for both spouses.

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2. What should be done if a CORRECT tax filing status was used – the taxpayer previously filed as Single or Head of Household but is now married? Complete steps 2a – 2c.

2a. Date of marriage: _____

2b. Provide **signed** copies of the 2021 IRS 1040 for both spouses, along with accompanying schedules 1, 2 or 3, if filed.

2c. Please answer the following regarding the taxpayer's spouse:

Name: _____

Birthdate: _____

Social Security Number: _____

3. What should be done if a CORRECT filing status was used – the taxpayer listed on the FAFSA filed Married Filing Jointly but is now divorced/legally separated? Complete steps 3a – 3b.

3a. Date of marital status change _____

3b. Provide copies of the taxpayer's:

- 2021 W-2 forms or 1099s
- **Signed** 2021 IRS 1040 along with accompanying Schedules 1, 2 or 3, if filed. If there was business income, please note on Schedule 1 to whom it belonged.

If you are unsure if your 2021 federal tax filing status was correct, please email (fa@svcc.edu) or call (815-835-6339) for assistance.

Student Signature _____ Date _____

Parent Signature _____ Date _____

(required if parent information included on FAFSA)

**Return to: Sauk Valley Community College, 173 IL RT 2, Dixon, IL 61021
Fax: 815-456-4232 or email: fa@svcc.edu**