FRAMINGHAM STATE UNIVERSITY

CLARIFICATION OF TAX FILING STATUS
2027-2028 Academic Year

Student's Last Name **First Name** **Middle Initial** **FSU ID #**

After reviewing your financial aid application, it appears there may be a tax filing discrepancy. The U.S. Department of Education requires us to gather additional information to resolve this potential conflict.

Individual(s) whose federal tax information needs clarification:

❒ Student ❒ Student's Spouse ❒ Student's Parent(s)

PART 1: TAX FILING STATUS---CONFLICTING INFORMATION

Federal filing status is determined by an individual's marital status on December 31, 2025, whether or not they have dependents, and their living arrangements. Generally speaking, married individuals are expected to file as either Married Filing Jointly or Married Filing Separately. Single individuals are expected to file as Single or Head of Household. Separated individuals may use different statuses depending on many factors. Determining the appropriate filing status can be complicated. Refer to Part I, Chapter 2 of IRS Publication 17 at www.irs.gov under "Forms and Pubs" for more detailed information on filing status requirements.

Below are the ways you can resolve your Filing Status discrepancy: If you believe your current Filing Status is correct but do not fall into the categories below, please contact the Financial Aid Office to speak with a counselor.

1. ***Document that the criteria to use the current Filing Status are met.***

   If you fall into one of the scenarios below please indicate that by checking the appropriate box, signing this form, and sending it back to the Financial Aid Office.

   ❒ You are married but filed as Head of Household because you lived apart from your spouse for at least the last 6 months of 2025, paid more than half the cost of keeping up a home, and had a qualifying dependent living with you for more than half the year.

   ❒ You are married but filed as Head of Household because your spouse does not live in the United States **or** does not have a Social Security Number.

2. ***Amend the incorrect tax return to an appropriate status.***

   We recommend that you consult with a tax professional with questions regarding your Federal Income Tax Return, particularly before amending your information. If an amended tax return is filed, we will need signed copies of both (1) the 1040X and (2) a copy of the original Tax Return Transcript or Tax Return, if we have not already received it. If you amend your return, you do not need to submit this form.

PART 2: CERTIFICATION AND SIGNATURE

Each person signing below certifies that the information on this form is complete and correct. **Digital signatures are not accepted.**

Student's Signature: _____ Date: _____

Student's Spouse's Signature: _____ Date: _____

Student's Parent's Signature: _____ Date: _____

Return this completed form to:

Financial Aid Office • Framingham State University • McCarthy Center, 5th Floor • 100 State Street
Framingham, MA 01701 • Phone: (508) 626-4534 • Fax: (508) 626-4598 financialaid@framingham.edu