

University of Idaho

Student Financial Aid Services
 875 Perimeter Drive MS4291
 Moscow, ID 83844-4291
 PHONE: 208-885-6312
 FAX: 208-885-5592
 EMAIL: finaid@uidaho.edu
 WEB: <https://www.uidaho.edu/financial-aid>

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 Doc: SSD – A6

Student Marital Status Correction/Clarification Form 2020-2021

Student: _____
Please Print

Student V#: _____

Today's Date: _____

Phone #: _____

We need clarification on your income information based on a marital status change since you originally filed your FAFSA, **-OR-** you mistakenly reported a spouse's income even though you were separated, divorced, or widowed at the time you filed your FAFSA.

See the last page of this form for more information on whose information should be included if you are re-married.

- _____ 1) A signed copy of your 2018 federal tax return
- _____ 2) Copies of all your 2018 W-2s and/or signed Schedule C's (or other signed tax Schedules if you earn income from another method not shown through a Schedule C, i.e. farming income, etc.).
- _____ 3) Please complete all the questions on this form.
- _____ 4) If you experienced a change in marital status after the FAFSA was completed, additionally provide 1) a brief letter to explain the situation including relevant dates **-AND-** 2) supporting documentation such as court orders, legal documents, etc.

We may request additional information once your documents are initially reviewed.

Blank is NOT a valid answer (enter a zero or N/A). Please sign where indicated.

Section A: Student Taxable Income January 2018 – December 2018	Amount
Unemployment Compensation	\$
Interest or Dividend Income	\$
Business or Farm Income (or Loss)	\$
Capital Gains (or Loss)	\$
IRA or Pension Distribution	\$
Rental Income or Partnership Income/Royalties	\$
Other:	\$

Section B: Student Untaxed Income January 2018 – December 2018	Amount
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings) including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S. Do not include amounts reported in code DD (employer contributions toward employee health benefits).	\$
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of line 28 + line 32.	\$
Child support received for any of your children. Do not include foster care or adoption payments.	\$
Tax-exempt interest income from IRS Form 1040—line 2a.	\$
Untaxed portions of IRA distributions or pensions from IRS Form 1040 Schedule 1—lines (4a minus 4b) Exclude rollovers. If negative, enter a zero here.	\$

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Section B: Student Untaxed Income January 2018 – December 2018	Amount
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Do not include the value of on-base military housing or the value of a basic military allowance for housing.	\$
Veteran's non-education benefits, such as Disability, Death Pension, Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$
Other untaxed income and benefits not reported on the FAFSA, such as workers' compensation, disability, etc. Also include the untaxed portions of Health Savings Accounts from IRS form 1040 Schedule 1–line 25. Do not include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or military housing allowance, combat pay (if you are not a tax filer), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$

Section C: Student Income Exclusions January 2018 – December 2018	Amount
Education credits from IRS Form 1040 Schedule 3-line 50.	\$
Child support you PAID because of divorce or separation or as a result of a legal requirement. Do not include support for children living in your household, as reported in the household size question on the FAFSA.	\$
Taxable earnings from need-based employment programs, such as Federal or State Work-Study and need-based employment portions of fellowships and assistantships.	\$
Student grants and/or scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships. Note: This is not the total amount of grants and scholarships you received in 2018 (as reported on the 1098T) - it is the taxable amount of grants and scholarships you included on your tax return. If you enter an amount here it means: 1) that you filed a federal tax return and 2) you included grants and/or scholarships as part of the income reported on the tax return.	\$
Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not include untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$
Earnings from work under a cooperative education program offered by a college. A cooperative education program is an educational system in which students may earn academic credit for career work done in their field of study (i.e. a paid internship for which you also earned credit).	\$

Section D: Student Assets at FAFSA submittal (see next page for more info)	Amount
Cash, Savings and Checking Accounts as of the date the 20-21 FAFSA was filed. Do not include financial aid residual funds.	\$
Investment net worth (current value minus debt), including real estate as of the date the 20-21 FAFSA was filed.* Do not include the value of retirement accounts such as a 401(k) or IRA, or the value of your primary residence.	\$
Net worth of business (business value minus debt) and/or farm (farm value minus debt) as of the date the 20-21 FAFSA was filed.** Do not include the value of a small business that you own and control and that has 100 or fewer full-time or full-time equivalent employees. Do not include the value of a family farm that you live on and operate.	\$

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Section E: Student Household Size (see below for more information)	
How many people are in your household?***	
How many in the question above will be college students between July 1, 2020 and June 30, 2021?****	

Additional directions for Section D

Net worth means current value minus debt. If net worth is negative, enter 0.

*Investments **do not include** the home you live in, the value of life insurance and retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.) and prepaid tuition plans, cash, savings and checking accounts already reported. Investments **do include** real estate, trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, Coverdale savings accounts, college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. *Investment value* includes the market value of these investments as of today. *Investment debt* means only those debts that are related to the investments.

**Business (of more than 100 employees) or investment farm value includes the market value of land, buildings, machinery, equipment, and inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Additional directions for Section E

*** Include in your household:

- Yourself (the student).
- Your spouse, if you are married.
- Your or your spouse's children if you or your spouse will provide more than half of the children's support from July 1, 2020, through June 30, 2021, even if a child does not live with you.
- Other people if they now live with you, and you or your spouse provides more than half of the other person's support, and will continue to provide more than half of that person's support from July 1, 2020 through June 30, 2021.

****Count yourself as a college student. Include others only if they will attend at least half-time in 2020-2021 in a program that leads to a college degree or certificate.

CERTIFICATION: By signing this worksheet, I certify that all the information reported on it is complete and correct. If you purposely give false or misleading information, you may be fined, sent to prison, or both.

Student Signature

Date

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*The 2020-2021 FAFSA asks for your marital status as of the date the FAFSA was completed, but it asks for your income and tax return information from 2018. Therefore, your marital status may be different than it was when the 2018 tax return was filed.

What if my marital status as of the date my 2020-2021 FAFSA was filed is different than the marital status reported on my 2018 tax return?

- If you filed a joint tax return for 2018 but were no longer married when you filed the 2020-2021 FAFSA, you will need to subtract the tax and income information for your former spouse to correctly answer the required questions on this form.
- If you did not file a joint tax return for 2018, but were married or re-married when you filed the 2020-2021 FAFSA, you will need to add the 2018 tax and income information for your current spouse to correctly answer the FAFSA questions when you are answering the required questions on this form.

What if my current spouse is different from the spouse listed on my 2018 tax return?

- If you filed a joint tax return for 2018, but were married to a different person when you filed the 2020-2021 FAFSA, you will need to subtract the tax and income information for your former spouse, and then add the 2018 tax and income information for your current spouse to correctly answer the required questions on this form.

What if I am recently widowed?

- If you were recently widowed, you'll need to subtract the tax and income information for your spouse to correctly answer the required questions on this form. Please contact Student Financial Aid Services for information and options available to you if you feel the information reported no longer accurately represents your financial situation.