
Self-Test Instructions

Complete the appropriate self-test below to see if you qualify to use the HOH filing status. Only one test will apply to you.

- Self-Test 1 Unmarried and not an RDP as of the last day of the year (i.e., never married, never registered as a domestic partner, or widowed in a prior year).
- Self-Test 2 (PAGES 3 & 4) Married or an RDP as of the last day of the year.
- Self-Test 3 (PAGES 4, 5, & 6) By the last day of the year, any of the following was true:
 - You received a final decree of divorce.
 - You received a final decree of legal separation.
 - You received a final decree dissolution of your registered domestic partnership.
 - You filed a Notice of Termination of Domestic Partnership with the California Secretary of State and the six-month waiting period for the notice to become final passed.

Self-Test 1 - For taxpayers who were unmarried and not an RDP

If you were never married, never an RDP, or were widowed in a prior year, answer the questions below to see if you qualify.

1. Did you keep up a home for your qualifying child who, on December 31, 2019, was either under age 19 or a full-time student under the age of 24?

A qualifying child can be any of the relatives listed below or a descendant of such a child:

- Birth child, grandchild, stepchild, or adopted child
- Eligible foster child
- Brother, half brother, or stepbrother
- Sister, half sister, or stepsister
- Blood related nephew or niece

Yes. Go to question 2.

No. Go to question 3.

2. Did this person provide more than half of his or her own support during the year?

Yes. Go to question 3.

No. Go to question 8.

3. Without regard to the person's age, did you keep up a home for your qualifying relative? A qualifying relative can be your birth child, grandchild, stepchild, adopted child, or a descendant of such a child.

Your qualifying relative may also be your:

- Brother, half brother, stepbrother, or brother-in-law
- Sister, half sister, stepsister, or sister-in-law
- Son-in-law or daughter-in-law
- Parent, grandparent, or stepparent
- Mother-in-law or father-in-law
- Blood related uncle, aunt, nephew, or niece

Yes. Go to question 4.

No. **Stop.** You do not qualify.

4. Did you provide more than half of the support for this person?

Yes. Go to question 5.

No. **Stop.** You do not qualify.

5. Did this person have gross income less than \$4,200 during the year?

Yes. Go to question 6.

No. **Stop.** You do not qualify.

6. Was this person your parent/stepparent (father or mother)?

Yes. Go to question 7.

No. Go to question 8.

7. Did you provide more than half the cost of keeping up a separate residence in which your parent/stepparent lived for the entire year?

Yes. Go to question 10.

No. Go to question 8.

8. Did this person live with you for more than half the year?

Yes. Go to question 9.

No. **Stop.** You do not qualify.

9. Did you pay more than half the cost of keeping up your home?

Yes. Go to question 10.

No. **Stop.** You do not qualify.

10. Did your qualifying person file a joint federal or state tax return with his or her spouse/RDP? (For an exception to this rule, see the Joint Return Test in the Legal Definitions section under Dependent Exemption Credit.)

Yes. **Stop.** You do not qualify.

No. Go to question 11.

11. Was your qualifying person a citizen or national of the U.S. or a resident of the U.S., Canada, or Mexico?

Yes. You qualify to use the HOH filing status.

No. **Stop.** You do not qualify.

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 - You received a final decree of divorce.
 - You received a final decree of legal separation.
 - You received a final decree of dissolution of your registered domestic partnership.
 - You filed a Notice of Termination of Domestic Partnership with the California Secretary of State and the six-month waiting period for the notice to become final had passed.
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Self-Test 2 - For taxpayers who were married or an RDP

If you were married or an RDP as of the last day of the year, answer the questions below to see if you qualify.

1. Did you live with your spouse/RDP at any time during the last six months of the year?

- Yes. **Stop.** You do not qualify.
 No. Go to question 2.

A **temporary absence** at any time during the last six months of the year counts as time lived with your spouse/RDP and you do not qualify.

2. Did you keep up a home for your birth child, stepchild, adopted child, or eligible foster child who, as of the last day of the tax year, had not reached the age of 19, or was a full-time student who had not yet reached the age of 24?

- Yes. Go to question 3.
 No. Go to question 4.

3. Did your child provide more than half of his or her own support during the year?

- Yes. Go to question 4.
 No. Go to question 7.

4. Without regard for the child's age, did you keep up a home for your birth child, stepchild, or adopted child?

- Yes. Go to question 5.
 No. **Stop.** You do not qualify.

5. Did you provide more than half the support for your child?

- Yes. Go to question 6.
 No. **Stop.** You do not qualify.

6. Did your child have gross income less than \$4,200 during the year?

- Yes. Go to question 7.
 No. **Stop.** You do not qualify.

7. Did your spouse/RDP (ex-spouse/ex-RDP) live with you and your child during the year?

- Yes. Go to question 8.
 No. Go to question 9.

8. Did your child live with you for more than half the year? You may include half the time that you, your spouse/RDP (ex-spouse/ex-RDP), and your child lived together, and all of the time you and your child lived together without your spouse/RDP.

- Yes. Go to question 10.
 No. **Stop.** You do not qualify.

9. Did your child live with you for more than half the year?

- Yes. Go to question 10.
 No. **Stop.** You do not qualify.

10. Did you pay more than half the cost of keeping up your home during the year?

- Yes. Go to question 11.
 No. **Stop.** You do not qualify.

11. Did your child file a joint federal or state tax return with his or her spouse/RDP? (For an exception to this rule, see the Joint Return Test in the Legal Definitions section under Dependent Exemption Credit.)

- Yes. **Stop.** You do not qualify.
 No. Go to question 12.

12. Was your child a citizen or national of the U.S. or a resident of the U.S., Canada, or Mexico?

- Yes. You qualify to use the HOH filing status.
 No. **Stop.** You do not qualify.

Self-Test 3 - For divorced or legally separated taxpayers

If by the last day of the year, you received a final decree of divorce, legal separation, or termination of registered domestic partnership, or filed a Notice of Termination of Domestic Partnership with the California Secretary of State and the six-month waiting period for the notice to become final passed, answer the questions below to see if you qualify.

1. Did you keep up a home for your qualifying child who, on December 31, 2019, was under age 19 or a full-time student under the age of 24?
A qualifying child can be any of the relatives listed below or a descendant of such a child:
 - Birth child, grandchild, stepchild, or adopted child
 - Eligible foster child
 - Brother, half brother, or stepbrother
 - Sister, half sister, or stepsister
 - Blood related nephew or niece Yes. Go to question 2.
 No. Go to question 3.
2. Did this person provide more than half of his or her own support during the year?
 Yes. Go to question 3.
 No. Go to question 8.
3. Without regard to the person's age, did you keep up a home for your qualifying relative? A qualifying relative can be your birth child, < grandchild, stepchild, adopted child, or a descendant of such a child.
Your qualifying relative may also be your:
 - Brother, half-brother, stepbrother, or brother-in-law
 - Sister, half sister, stepsister, or sister-in-law
 - Son-in-law or daughter-in-law
 - Parent, grandparent, or stepparent
 - Mother-in-law or father-in-law
 - Blood related uncle, aunt, nephew, or niece Yes. Go to question 4.
 No. **Stop.** You do not qualify.
4. Did you provide more than half of the support for this person?
 Yes. Go to question 5.
 No. **Stop.** You do not qualify.
5. Did this person have gross income less than \$4,200 during the year?
 Yes. Go to question 6.
 No. **Stop.** You do not qualify.
6. Was this person your parent/stepparent (father or mother)?
 Yes. Go to question 7.
 No. Go to question 8.
7. Did you provide more than half the cost of keeping up a separate residence in which your parent/stepparent lived for the entire year?
 Yes. Go to question 13.
 No. Go to question 11.
8. Was this person your birth child, stepchild, adopted child, or eligible foster child?
 Yes. Go to question 9.
 No. Go to question 11.
9. Did your spouse/RDP (ex-spouse/ex-RDP) live with you and your child during the year?
 Yes. Go to question 10.
 No. Go to question 11.
10. Did your child live with you for more than half the year? You may include half the time that you, your spouse/RDP (ex-spouse/ex-RDP), and your qualifying child lived together, and all of the time you and your qualifying child lived together without your spouse/RDP (ex-spouse/ex-RDP).
 Yes. Go to question 12.
 No. **Stop.** You do not qualify.
11. Did your qualifying person live with you for more than half of the year?
 Yes. Go to question 12.
 No. **Stop.** You do not qualify.
12. Did you pay more than half the cost of keeping up your home during the year?
 Yes. Go to question 13.
 No. **Stop.** You do not qualify.
13. Did your qualifying person file a joint federal or state tax return with his or her spouse/RDP? (For an exception to this rule, see the Joint Return Test in the Legal Definitions section under Dependent Exemption Credit.)
 Yes. **Stop.** You do not qualify.
 No. Go to question 14.
14. Was your qualifying person a citizen or national of the U.S. or a resident of the U.S., Canada, or Mexico?
 Yes. You qualify to use the HOH filing status.
 No. **Stop.** You do not qualify.