

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, 2023, 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 \$4,700 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.