Student Financial Services
G-1 Parker Hall, 300 W. 13th Street
Rolla, MO 65409
Phone: 573/341-4282 Fax: 573/341-4274

2025-2026 Financial Aid Year
Dependent Special Circumstance Review

Name (Last, First): _____Student ID: _____

Pease indicate all the circumstances that may apply to your situation. These forms and documentation should be submitted through the Secure Document Upload in Joe'SS or mailed to the Student Financial Services Office. Please send all documents together, and be sure to make **copies** of your documentation, as these documents will not be returned.

If your family's current or future income is less than or different than in the 2023 calendar year because of one or more of the following conditions, and your Student Aid Index (SAI) is not already less than or equal to $0, an adjustment of your 2025-2026 FAFSA information may be possible. (If your SAI is less than or equal to zero, an adjustment to your FAFSA information will not change your eligibility for need-based aid and a Special Circumstance review will not be completed). **(Please check that you have attached all the following for the appropriate category.)**

Required Documentation (All Categories)
Note: These documents are required before we can begin your Special Circumstance review. If you have already completed verification, you do not need to complete it again.

- ☐ Verification Worksheet for Dependent Students (attached to the end of this form)
- ☐ Any required verification documentation (see worksheet)
- ☐ **Explanation of Special Circumstances**

Loss of Income/Employment

- ☐ Letter(s) of termination (including date of termination) from employer(s)
- ☐ Copy of final pay stub(s) showing year-to-date income prior to termination
- ☐ Unemployment award letter (if applicable)
- ☐ Copy of current pay stub if employed with a new employer

Disability/Retirement/Job Change

- ☐ Letter(s) from employer(s) documenting date employment ends (if due to disability or retirement)
- ☐ Letter(s) from employer(s) documenting reduction in income due to job change (must include salary or wage information)
- ☐ Copy of final/current pay stub showing year-to-date income

Divorce/Separation/Death of a Parent after filing
Note: Income and assets on the parents' 2023 tax return transcripts should be divided to reflect only the custodial parent's portion

- ☐ Copy of legal document related to requested change (acceptable documentation includes legal notice of separation, divorce decree, death certificate)
- ☐ Documentation of any life insurance benefits received (if death of a parent) or child support payments (if divorced)

Loss or Reduction of Social Security (taxed), Child Support or, Alimony

- ☐ Original 2023 benefit statement listing total amount received
- ☐ Revised 2025/2026 benefit statement and/or court documents listing updated amount to receive and effective date
- ☐ Copy of statement from Social Security Administration documenting change in benefits

Elementary or Secondary School Tuition

- ☐ Documentation of private elementary, junior high and/or high school tuition paid, or to be paid in the 2025- 2026 academic year. Please download, complete, and attach the Elementary and Secondary Tuition Verification Form from sfs.mst.edu/resources/forms/

Medical Expenses - Family

Note: The FAFSA already accounts for a portion of a family's income for medical expenses. For an adjustment to be made, the total out-of-pocket medical expenses must exceed 11% of the amount listed in the "Income Protection Allowance" chart. (Insurance premiums and expenses covered by insurance may not be included in this total)

☐ Documentation of out-of-pocket medical expenses paid by the family between January 1, 2025, and December 31, 2026, must be provided. Acceptable documentation includes, but is not limited to hospital and doctor's bills that have been paid, credit card statements showing paid medical expenses, insurance documentation that shows out of pocket paid (not just billed), etc. If formal payment plan(s) have been set up with medical facilities, a copy of the agreement and payment(s) amounts must be submitted.

Table A2: Income Protection Allowance

Family Size (including student)	Income Protection Allowance Amount
2	$28,530
3	$35,510
4	$43,870
5	$51,750
6	$60,540

Note: For each additional household member, add $6,840.

Other Circumstances

☐ The above-mentioned criteria are only the most common reasons for Special Circumstances Review. If you have circumstances, you believe may qualify for a change in FAFSA information but are not listed above, please submit a written explanation and documentation of your circumstance along with this completed form.

Expected 2025 taxable and non-taxable income & benefits

Estimated 2025 Income	☐ **Monthly** ☐ **Annual**	**Student**	**Parent 1**	**Parent 2**
Taxable Income	Includes wages, business and/or farm income			
Other Taxable Income	Includes alimony, capital gains, pensions, annuities, etc.			
Non-Taxable Income	Includes child support received			
Other Non-Tax Income	Indicate what is included in this amount			

Certification: I/we certify that all information on this form is true, accurate and complete. Statements and documents are attached to this form to support my request adjustments.

Student signature: _____ **Parent signature:** _____

Date: _____ **Phone Number**: _____ **Date**: _____ **Phone Number**: _____

Email: _____ **Email**: _____

If additional documentation is needed, both the parent and student will receive the request via both the parent's and the student's email.

Return form to Student Financial Services

In-person/mail: G-1 Parker Hall, 300 West 13th St Rolla, MO 65409-0250

Fax: 573.341.4274

Submit in Joe'SS: Secure Document Upload (QR Code provided)

Student Financial Services
G-1 Parker Hall, 300 W. 13th Street
Rolla, MO 65409
P: 573/341-4282 F: 573/341-4274

2025-2026 Financial Aid Year
Dependent Verification Worksheet

Your FAFSA was selected by the U.S. Department of Education for review in a process called "Verification." In this process Missouri S&T is required to compare information from your FAFSA with the information on this worksheet and with any other required documents. The law states we have the right to ask you for this information and review it for accuracy under the financial aid program rules (34 CFR, Part 668). **Verification must be completed before your financial aid will be credited to your student account.**

INSTRUCTIONS

1. Complete all sections of this worksheet in **full**.
2. Student and parent(s) must use their 2023 Federal Income Tax for the 2025-2026 academic year. The easiest way to provide this information is to use the IRS Direct Data Exchange (DDX) to transfer your 2023 tax information to your 2025-2026 FAFSA, if you have not already. **See instructions attached or go to**: sfs.mst.edu/resources/forms/
3. All documents must be submitted by the following deadlines: Fall
   2025 Enrollment: October 31, 2025
   Spring 2026 Enrollment: March 1, 2026
4. Please return all documents requested to our office via fax to (573)341-4274, secure document upload in Joe'SS or mail to G-1 Parker Hall, 300 W 13th St., Rolla, MO 65409-0250.

Student Information

Last Name | First Name | M.I.

Daytime Phone number (include area code) | Date of Birth | Missouri S&T Student ID#

Family Information

Please complete the chart below. Include:

- Yourself, even if you don't live with your parents
- Your parents (biological, adoptive, or as determined by the state) – include your stepparent, if the parent you live with is remarried)
- Your parents' other children (even if they do not live with your parents) if your parents will provide more than half of their support between July 1, 2025, and June 30, 2026, or they would be required to provide parental information when applying for Federal Student Aid.
- Other people if they now live with your parents, your parents provide more than half of their support and your parents will continue to provide more than half of their support between July 1, 2025, and June 30, 2026.

Full Name	Age	Relationship
		Student
		Parent 1
		Parent 2

If you need additional space, attach a separate page.

Student Tax Information

Check only one box below regarding STUDENT information

a. ☐ I filed a 2023 Federal Tax Return and used the IRS DDX when completing the FAFSA.
b. ☐ I manually entered or updated my tax and income information on the FAFSA and have attached a 2023 Tax Return Transcript from the IRS **or** a **signed copy** of my 2023 federal tax return (IRS form 1040) and applicable schedules.
c. ☐ I was not employed, did not have income, and am not required to file a 2023 Federal IRS Tax Return.
d. ☐ *I was employed and had income but am not required to file a 2023 Federal Tax Return.

***COMPLETE ONLY IF BOX D ABOVE IS CHECKED:** Students who did not file a 2023 Federal Tax Return are required to submit a copy of ALL W-2(s) for 2023 from each employer. List all 2023 employers and related earnings below.

Name of Employer	Amount Earned in 2023

If more space is required, attach a separate page.

Parent(s)' Tax Information

Check only one box below regarding PARENT information

a. ☐ I filed a 2023 Federal Tax Return and used the IRS DDX when completing the FAFSA.
b. ☐ I manually entered or updated my tax and income information on the FAFSA and have attached a 2023 Tax Return Transcript from the IRS **or** a **signed copy** of my 2023 federal tax return (IRS form 1040) and applicable schedules.
c. ☐ I was not employed, did not have income, and am not required to file a 2023 Federal IRS Tax Return.
d. ☐ *I was employed and had income but am not required to file a 2023 Federal Tax Return.

***COMPLETE ONLY IF BOX D ABOVE IS CHECKED:** Parents who did not file a 2023 Federal Tax Return are required to submit ALL W-2(s) from each employer. List all 2023 employers and related earnings below.

Name of non-Filer	Name of Employer	Amount Earned in 2023

If more space is required, attach a separate page.

Sign this worksheet by hand or with stylus. Typed or digital signatures will be returned.

The student and at least one parent whose information was reported on the 2025-2026 FAFSA must **manually** sign and date this worksheet. Each person signing certifies that all the information reported is complete and correct. **If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.**

Student Date

Parent Date

Parent Daytime Phone number (include area code)

Parent Email

Return form to Student Financial Services In-person/mail: G-1 Parker Hall
300 West 13th Street Rolla, MO
65409-0250

Fax: 573.341.4274

Submit in Joe'SS: Secure Document Upload (QR Code provided)

IRS DDX INFORMATION

Students and parents who are eligible to use the IRS Direct Data Exchange (DDX) can access it from within the Free Application for Federal Student Aid (FAFSA) on the student or parent finances pages:

- The DDX tool easily transfers information with the click of a button, and instantly and accurately retrieves your information. Once you consent for your information to be pulled, you will be transferred to the IRS website. Authorization of identity will be required before any personal information is displayed. Make sure you enter your address exactly how it appears on your tax return. If the link to the IRS does not appear, then the student/parent is not eligible to use the DDX tool.
- Start by going to the FAFSA 25-26 if you have not already finished the form.
- Enter your FSA ID. (**Note**: The person whose tax information is being transferred should enter his or her own FSA ID. Students will not be asked to enter their FSA ID if they entered an FSA ID to begin their FAFSA.)
- If the student and spouse file or will file a 2023 IRS income tax return(s). As part of the Federal student aid eligibility, students and spouses (as appropriate), will be required to consent to import income and tax information from the IRS. In most cases, no further documentation is needed to verify 2023 income information that was transferred into the student's FAFSA using income and tax information directly from the IRS via the DDX.
- If 2023 income tax return information for the student (or spouse, if applicable) was not transferred via the DDX and considered verified, the student should provide the institution with a 2023 IRS Tax Return Transcript(s) or a signed copy of the 2023 income tax return and applicable schedules to be uploaded through our Secure Document Uploader in Joe'SS.

If you didn't file taxes with the IRS or you need to request a Tax Return Transcripts:

IF YOU ARE A NON-TAX FILER	**ONLINE**
A non-filer is any Student or Parent (not filing a joint return) who did not work or did work but did not file a 2023 Federal Income Tax Return. For the 2025-2026 academic year any parent or independent student who is a non-Filer is required to provide all 2023 W2(s) from each employer. If there was zero income earned in 2023, you should provide information on how you were supported during 2023.	• Go to www.irs.gov • Click "Get Your Tax Record" and NOT the "Account Transcript." • Follow the instructions to create an ID.me account if you do not already have one. If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS help site at https://help.id.me/hc/en-us
BY PHONE	**BY MAIL**
Call the IRS at 1-800-848-0979 Transcript is generally received within 10 business days from the IRS's receipt of the telephone request.	• Go to www.irs.gov • Click "Get Your Tax Record and NOT the "Account Transcript" • The transcript is generally received within 10 business days from the IRS's receipt of the online request.