



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
Independent Special Circumstance Review

Name (Last, First): _____ **Student ID:** _____

Please 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 you and/or your spouse's (if applicable) 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 Independent 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 Spouse after filing

Note: Income and assets on the student's and spouse's 2023 tax return transcripts should be divided to reflect only the student'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 spouse) 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.

Independent Students without Dependent(s) Other than a Spouse

- Unmarried: \$19,865
- Married: \$28,530

Independent Students with Dependent(s) Other than a Spouse

Table C2: Income Protection Allowance Married with Dependents	
Family Size (including Student)	Income Protection Allowance Amount
3	\$56,430
4	\$69,670
5	\$82,220
6	\$96,150
Note: For each additional household member, add \$10,860	

Table C3: Income Protection Allowance Single with Dependents	
Family Size (including Student)	Income Protection Allowance Amount
2	\$53,710
3	\$66,880
4	\$82,570
5	\$97,440
6	\$113,950
Note: For each additional household member, add \$12,880	

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 Spouse

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: _____

Spouse signature: _____

Date: _____ **Phone Number:** _____

Date: _____ **Phone Number:** _____

Email: _____

Email: _____

If additional documentation is needed, both the student and student's spouse (if applicable) will receive the request via email.

Return form through Secure Document Uploader in Joe'SS (QR Code provided)





Student Financial Services
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2025-2026 Financial Aid Year Independent 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 your spouse, if married) 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) which is located within the FAFSA to transfer your 2023 tax information to your 2025-2026 FAFSA, if you have not already.
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 and your spouse (if married), and
- Your children if you will provide more than half of their support between July 1, 2025, and June 30, 2026.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support between July 1, 2025, and June 30, 2026.

If you need additional space, attach a separate page.

Full Name	Age	Relationship
		Student

Student's (and spouse, if married) Tax Information

Check only one box below regarding STUDENT information

- a. ☐ I (and spouse) filed a 2023 Federal Tax Return and used the IRS DDX while completing the FAFSA.
- b. ☐ I (and spouse) filed a 2023 Federal Tax Return and manually entered or updated my tax information on the FAFSA. I have attached for both myself and my (spouse) a 2023 Tax Return Transcript from the IRS **or** a **signed copy** of my and my (spouse) 2023 federal tax return (IRS form 1040) and applicable schedules.
- c. ☐ I (and spouse) was not employed, did not have income, and am not required to file a 2023 Federal IRS Tax Return.
- d. ☐ *I (and spouse) 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 (and spouse) who did not file a 2023 Federal Tax Return are required to submit ALL W-2(s) for 2023 from all employers. List all 2023 employers and related earnings below.

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.

Each person signing certifies that all the information reported is complete and correct. The student must manually sign this worksheet. (If married, the spouse's signature is optional.)

Student

Date

Spouse

Date

Daytime Phone number (include area code)

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sent to prison, or both.

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)

