



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

**2026-2027 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 2024 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 2026-2027 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.

- Explanation of Special Circumstances**
- Verification Worksheet for Independent Students (attached to the end of this form)
- Any required verification documentation (see worksheet)
- Additional documentation as identified by your specific circumstance (see page 2)

**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 2024 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 2024 benefit statement listing total amount received
- Revised 2026/2027 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 2026-2027 academic year. Please download, complete, and attach the Elementary and Secondary Tuition Verification Form from [sfs.mst.edu/formsdocuments](https://sfs.mst.edu/formsdocuments).

**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, 2026, and December 31, 2027, 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: \$18,310
- Married: \$29,350

**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	\$57,730
4	\$71,280
5	\$84,120
6	\$98,370
<b>Note:</b> For each additional household member, add \$11,110	

Table C3: Income Protection Allowance Single with Dependents	
Family Size (including Student)	Income Protection Allowance Amount
2	\$54,950
3	\$68,430
4	\$84,480
5	\$99,700
6	\$116,590
<b>Note:</b> For each additional household member, add \$13,180	

**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 include your circumstance in the written explanation (page 1) and documentation of your circumstance along with this completed form.

**Expected 2026 taxable and non-taxable income & benefits**

**Estimated 2026 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**  
 G-1 Parker Hall, 300 W. 13th Street  
 Rolla, MO 65409  
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**2026-2027 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 2024 Federal Income Tax for the 2026-2027 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 2024 tax information to your 2026-2027 FAFSA, if you have not already.
3. All documents must be submitted by the following deadlines:  
 Fall 2026 Enrollment: October 31, 2026  
 Spring 2027 Enrollment: March 1, 2027
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:

- You and your spouse (if married), and
- Your children if you will provide more than half of their support between July 1, 2026, and June 30, 2027.
- 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, 2026, and June 30, 2027.

If you need additional space, attach a separate page.

Full Name	Age	Relationship
		<b>Student</b>

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

### Check only on box below regarding STUDENT information

- a.  I (and spouse) filed a 2024 Federal Tax Return and used the IRS DDX while completing the FAFSA.
- b.  I (and spouse) filed a 2024 Federal Tax Return and will provide a Federal Tax Return Transcript from the IRS or a signed copy of the 2024 income tax return and applicable schedules.
- c.  \*I (and spouse) was not employed, did not have income, and am not required to file a 2024 Federal IRS Tax Return.
- d.  \*I (and spouse) was employed and had income but am not required to file a 2024 Federal Tax Return.

**\*COMPLETE ONLY IF BOX C or D ABOVE IS CHECKED:** Students (and spouse) who did not file a 2024 Federal Tax Return are required to submit ALL W-2(s) for 2024 from all employers. List all 2024 employers and related earnings below.

Name of Employer	Amount Earned in 2024

If more space is required, attach a separate page.

Signature Required of Non-Tax Filer \_\_\_\_\_

Signature Required of Non-Tax Filer (Spouse) \_\_\_\_\_

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

The student must **manually** sign and date this worksheet. (Spouse signature, if applicable, is optional) 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

\_\_\_\_\_  
Spouse (Optional)

\_\_\_\_\_  
Date

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 DDX (Direct Data Exchange) tool can access it while filling out the free application for Federal Student Aid (FAFSA):

- 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 26-27](#) 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 filed or will file a 2024 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 2024 income information that was transferred into the student’s FAFSA using income and tax information directly from the IRS via the DDX.
- If 2024 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 2024 IRS Tax Return Transcript(s) or a signed copy of the 2024 income tax return and applicable schedules to be uploaded through our Secure Document Uploader in Joe’S.

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

<p><b>IF YOU ARE A NON-TAX FILER</b></p> <p>A non-filer is any Student or Spouse (not filing a joint return) who did not work or did work but did not file a 2024 Federal Income Tax Return. For the 2026-2027 academic year any independent student or spouse (if applicable) who is a non-Filer is required to provide all 2024 W2(s) from each employer. If there was zero income earned in 2024, you should provide information on how you were supported during 2024.</p>	<p><b>ONLINE</b></p> <ul style="list-style-type: none"> <li>• Go to <a href="http://www.irs.gov">www.irs.gov</a></li> <li>• Click “Get Your Tax Record” and NOT the “Account Transcript.”</li> <li>• Follow the instructions to create an ID.me account if you do not already have one.</li> </ul> <p>If you need help creating an ID.me account or verifying your identity, visit the ID.me IRS help site at <a href="https://help.id.me/hc/en-us">help.id.me/hc/en-us</a></p>
<p><b>BY PHONE</b></p> <p>Call the IRS at 1-800-848-0979</p> <p>Transcript is generally received within 10 business days from the IRS’s receipt of the telephone request.</p>	<p><b>BY MAIL</b></p> <ul style="list-style-type: none"> <li>• Go to <a href="http://www.irs.gov">www.irs.gov</a></li> <li>• Click “Get Your Tax Record and NOT the “Account Transcript”</li> <li>• The transcript is generally received within 10 business days from the IRS’s receipt of the online request.</li> </ul>