



2018-2019 INDEPENDENT Special Circumstance Review

Last Name (Student)	First Name	M.I.
---------------------	------------	------

Daytime Phone number (include area code)	Missouri S&T Student ID#
--	--------------------------

Please indicate all the circumstances that may apply to your situation. These forms and documentation can be scanned and emailed, faxed, mailed, or brought to the Student Financial Assistance 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 current or future income is less than or different than in the 2016 calendar year because of one or more of the following conditions, and your Expected Family Contribution (EFC) is not already \$0, an adjustment of your 2018-2019 FAFSA information may be possible. (If your EFC is 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). If additional documentation is needed, you will receive the request via your S&T email. **(Please check that you have attached all of 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 submitted the required verification worksheet and tax information, you do not need to submit these documents again.

- Use the IRS Data Retrieval Tool on the FAFSA (fafsa.gov) or provide copies of your 2016 IRS Tax Return Transcripts.
- Verification Worksheet for Independent Students - (attached to the end of this form)
- Explanation of Special Circumstances

Additional Required Documentation related to Specific "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

- 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 dependent) or child support payments (if divorce)

Loss or Reduction of Social Security Benefits, Child Support, or Alimony

- Original 2016 benefit statement listing total amount received
- Revised 2017 or 2018 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 2018-2019. Please download, complete, and attach the Elementary and Secondary Tuition Verification Form from <http://sfa.mst.edu/forms/>.

Medical Expenses – Family

**Note: The FAFSA already protects a portion of a family’s income for medical expenses and therefore, the total amount of paid medical expenses must exceed 11% of the amount on the “Income Protection Allowance” chart for an adjustment to be made.*

- Documentation of expenses paid between Jan. 1, 2018 and Dec. 31, 2019 (e.g. hospital and doctor’s statements, receipts, paid bills, and/or insurance benefit statements) for the family. If formal payment plan(s) have been made, submit copy of signed agreement.

Table C3: Income Protection Allowance					
Number in student’s household, including student (FAFSA/SAR #95)	Number of college students in the household (FAFSA/SAR #96)				
	1	2	3	4	5
2	\$25,870	\$21,450	not applicable	not applicable	not applicable
3	\$32,210	\$27,810	\$23,390	not applicable	not applicable
4	\$39,780	\$35,370	\$30,960	\$26,530	not applicable
5	\$46,940	\$42,500	\$38,100	\$33,690	\$29,290
6	\$54,890	\$50,480	\$46,080	\$41,640	\$37,250

Note: For each additional family member, add \$6,200.
For each additional college student, subtract \$4,400.

Other Circumstances

- 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. The above-mentioned criteria are only the most common reasons for Special Circumstances Review.

Expected 2018 taxable and non-taxable income & benefits

2018 U.S. Income earned from work:

{January 1st –December 31st}

Student : \$ _____

Spouse: \$ _____

Estimated 2018 totals:

\$ _____

2018 other taxed and untaxed:

Complete the following as it applies to you:

	Student	Spouse
Social Security benefits \$ _____ x _____ months =	\$ _____	\$ _____
ADC OR AFDC	\$ _____	\$ _____
Child support	\$ _____	\$ _____
Unemployment Benefits	\$ _____	\$ _____
Other untaxed benefits (specify _____)	\$ _____	\$ _____
Welfare benefits	\$ _____	\$ _____
Disability benefits	\$ _____	\$ _____
Other taxable income (include interest, dividends, business income, alimony, pension, capital gains, annuity, etc.)	\$ _____	\$ _____
Total estimated 2018 other taxed & untaxed income:	\$ _____	\$ _____

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's signature: _____ Date: _____

Spouse's signature: _____ Date: _____

(If married, spouse's signature is optional.)

Daytime phone: _____ Cell phone: _____

Email address: _____

Return to:
Student Financial Assistance Office
Missouri University of Science & Technology
G-1 Parker Hall, 300 West 13th Street
Rolla, MO 65409-0250
1.800.522.0938 or 573.341.4282
Fax: 573.341.4274
Email: sfa@mst.edu Web: sfa.mst.edu

2018-2019 INDEPENDENT VERIFICATION (V1) 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 688). **Verification must be completed before your financial aid will be credited to your student account.**

INSTRUCTIONS

1. Complete all sections of this worksheet (A-D) in **full**. **Incomplete forms will be returned.**
2. Student (and your spouse, if married) must use their 2016 Federal Income Tax for the 2018-2019 academic year. The easiest way to provide this information is to use the IRS Data Retrieval Tool (DRT) to transfer your 2016 tax information to your 2018-2019 FAFSA, if you have not already. **See instructions attached or go to: sfa.mst.edu/forms/**
3. All documents must be submitted by the following deadlines:
 Fall 2018 Enrollment: October 31, 2018
 Spring 2019 Enrollment: March 1, 2019
4. Please return all documents requested to our office via fax to (573)341-4274, email to sfa@mst.edu or mail to G-1 Parker Hall, 300 W 13th St, Rolla, MO 65409-0250.

A. Student Information

Last Name	First Name	M.I.
Daytime Phone number (include area code)	Date of Birth	Missouri S&T Student ID#

B. Family Information

Full Name	Relationship		
Write the names of the people who you will support below: 1. Include yourself as the student. 2. Include your spouse if you are married. 3. Include your dependent children if you provide more than half of their support between July 1, 2018 and June 30, 2019. 4. Include other dependents if they now live with your household and you will continue to provide <i>more than half</i> of their support through June 30, 2019.	Write the relationship of each family member to the student in the chart below.		
	College		
	Add the name of the college for any household member who will be enrolled in a degree, diploma, or certificate program, at an eligible postsecondary educational institution <i>at least half-time</i> any time between July 1, 2018 through June 30, 2019		
Age			
Write the age of each family member in the chart below.			
Full Name	Age	Relationship	College
		Self/Student	Missouri S&T

*If more space is required, attach a separate page.

C. Student's (and spouse, if married) Information *Student Name / S&T ID #:*

Check only one box below regarding STUDENT Information

- a. I (and spouse) filed a 2016 Federal Tax Return and used the IRS DRT when completing the FAFSA.
- b. I (and spouse) filed a 2016 Federal Tax Return and will provide a Federal Tax Return Transcript from the IRS.
- c. * I (and spouse) was not employed, did not have income, and am not required to file a 2016 Federal IRS Tax Return.
- d. * I (and spouse) was employed and had income but are not required to file a 2016 Federal Tax Return.

*COMPLETE ONLY IF BOX C or D ABOVE IS CHECKED: Students (and spouses) who did not file a 2016 Federal Tax Return are required to submit a Verification of Non-Filing Letter from the IRS and ALL W-2(s) for 2016 from all employers. List all 2016 employers and related earnings below.

Name of Non-Filer	Name of Employer	Amount Earned in 2016	
		\$	
		\$	
		\$	
		\$	

*If more space is required, attach a separate page.

Signature Required of Non-Filer _____

Signature Required of Non-Filer (Spouse) _____

D. Manually sign this Worksheet. Forms with electronic/typed signatures will be returned.

Each person signing certifies that all the information reported is complete and correct. The student must 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, sentenced to jail, or both.

DATA RETRIEVAL INSTRUCTIONS

The Easiest and Fastest way to complete your verification is to use the IRS Data Retrieval on your completed FAFSA. To make the correction use the steps below.

- ⇒ Go to www.fafsa.gov
- ⇒ Click on “Login”
- ⇒ Enter the student’s name, social security number and date of birth and click “Next”
- ⇒ Select the 2018/2019 FAFSA and click on “Make FAFSA Corrections”
- ⇒ Enter the Student’s FSA ID and password and click “Next”
- ⇒ Navigate to the “Financial Information” section of the FAFSA.
- ⇒ Update the filing status of your parents IRS income tax return. Make sure “Already completed” is selected and click “Next”
- ⇒ You will be presented with a series of questions that will determine your eligibility to use the Data Retrieval Tool. Once you are presented with the option to enter your FSA ID and “Link to IRS” complete the information and click “Link to IRS”. You will then be directed to the IRS website.
- ⇒ Once on the IRS website, enter the requested information as it appears on your tax return. If the IRS is able to validate your identification your tax information will be displayed. Select “Transfer My Tax Information into the FAFSA” and then click on “Transfer Now”
- ⇒ You will be re-directed back to FAFSA.
- ⇒ **When completed proceed to the Sign and Submit section of FAFSA and submit your corrections “SUBMIT MY FAFSA NOW”**

Tax Return Transcript AND Verification of Non-Filing from the IRS

<p style="text-align: center;">Verification of Non-Filing</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 2016 Federal Income Tax Return. For the 2018-2019 academic year a Non-Filer is required to provide a Verification of Non-Filing Letter from the IRS and all W2(s) from each employer. A request to the IRS for a Verification of Non-Filing Letter can be made using the IRS “Get Transcript Online” tool at www.irs.gov/Individuals/Get-Transcript or by submitting IRS Form 4506-T and checking box 7.</p>	<p style="text-align: center;">Transcript on Online</p> <p>Go to WWW.IRS.GOV Under Tools select Get a Transcript by Mail Follow prompts: Make sure to request Tax Return Transcript for year 2016. You should receive your transcript in 5-10 day.</p>
<p style="text-align: center;">Transcript by Mail</p> <p>Complete Form 4506-T (Request for Transcript of Tax Return) Form 4506-T is available online at https://www.irs.gov/pub/irs-pdf/f4506t.pdf</p>	<p style="text-align: center;">Transcript By Phone</p> <p>Call the IRS at 1-800-829-1040 Follow prompts: Option 2 (personal income taxes) Option 1 (tax history) Option 2 (Tax Return Transcript) Enter and Verify Social Security number(s) Enter and Verify street address Press 2 for Tax Transcript and indicate which year: 2016</p>