Independent Special Circumstance Form 2014-2015

Please print

Students Name: ________________________________________  Student ID # _______________________
                             Last               First               M.I

Address: __________________________                           Phone # ________________________________

_________________________________________  ___
City                   State                      Zip

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 send copies of your documentation, as these documents will not be returned.

If you have lost income based on one or more of the following conditions, adjustment of your 2014-15 FAFSA information may be possible if your Expected Family Contribution (EFC) is not already zero. If your EFC is zero, an adjustment to your FAFSA information will not change your eligibility for need-based aid. For that reason, if your EFC is zero, do not submit a Special Circumstance form. If additional documentation is needed, it will be requested by email to the students’ Missouri S&T email address. (Please check that you have attached the following for the appropriate category)

Required Documentation (All Categories)

Please note: These documents are required before we can begin your Special Circumstance review. If your FAFSA has been selected for Verification, and you have already submitted a Verification Worksheet and you and your spouses’ 2013 IRS Tax Return Transcripts to the Missouri S&T Student Financial Assistance Office, you do not need to submit the documents below:

☐ Copies of your and (if applicable) your spouse’s 2013 Federal Tax Transcript(s)
☐ Verification Form for Independent Students

Additional Required Documentation related to Specific “Special Circumstances”

Loss of Income
☐ 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
☐ Documentation of any other income, such as retirement benefits and severance pay, etc.
☐ Income projection for January 1, 2014 through December 31, 2014 (page 2 of this form) for all individuals whose information is on the FAFSA-include a year to date income statement for current employment and documentation of unemployment benefits (if applicable)

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 parent) or child support payments (if divorce)

Loss or Reduction of Social Security Benefits, Child Support, or Alimony
☐ Copy of statement from Social Security Administration documenting change in benefits
☐ Copy of legal document reflecting loss or reduction of child support or alimony

Elementary or Secondary School Tuition
☐ Documentation of private elementary, junior high and/or high school tuition paid, or to be paid in 2014-2015. Please download and complete the Elementary and Secondary Tuition Verification Form from http://sfa.mst.edu under Forms and Policies.

Medical Expenses – Family
*Note: The FAFSA already protects a portion of a family’s income for medical expenses and therefore, the total amount paid must exceed that amount before any adjustment can be made. Paid medical expenses must exceed 11% of the amount on the “Income Protection Allowance” chart on this form for an adjustment to be made.
☐ Documentation of expenses paid between Jan. 1, 2014 and Dec. 31, 2014 (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>
<thead>
<tr>
<th>Table A3: Income Protection Allowance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number in parents’ household, including student (FAFSA/SAR #73)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>2 . . . . .</td>
</tr>
<tr>
<td>3 . . . . .</td>
</tr>
<tr>
<td>4 . . . . .</td>
</tr>
<tr>
<td>5 . . . . .</td>
</tr>
<tr>
<td>6 . . . . .</td>
</tr>
</tbody>
</table>

Note: For each additional family member, add $4,180. For each additional college student (except parents), subtract $2,970.

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 2014 taxable and non-taxable income & benefits

2014 U.S. Income earned from work:

Student: $___________

{January 1st – December 31st}

Spouse: $___________

Estimated 2014 totals:

$___________

2014 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 2014 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
sfa@mst.edu
IndepeNdeNt- Vi 2014/2015 veRiFication wOrksheet FeDeRal StuDenT aID PrOgram

Your Free Application for Federal Student Aid was selected for review in a process called “Verification”. In this process, the Missouri University of Science & Technology Student Financial Assistance Office will verify the information you provide on this worksheet, and any other required documents, to the information you provided on your FAFSA. Federal law states that we cannot disburse federal aid unless you complete and submit this form to the Student Financial Assistance Office. If there are differences between your FAFSA information and the financial documents you’ve submitted, we will make the corrections to your FAFSA information electronically. Missouri University of Science & Technology, Student Financial Assistance Office must review the requested information, under the financial aid program rules (CFR Title 34, Part 668).

WHAT YOU SHOULD DO:
✓ You and (your spouse if married) must complete and submit this 3 page worksheet. You (the student) must also sign page 3.
✓ Submit copies of your and your spouse’s 2013 IRS Tax Return Transcripts. (If you and your spouse used the IRS Data Retrieval when filing your FAFSA you do not need to submit the IRS Tax Return Transcripts. See page 4 on how to request your 2013 IRS Tax Return Transcript if you did not use the IRS Data Retrieval.)
✓ Submit any other documents required by the Department of Education or Student Financial Assistance Office. (including W-2 forms from student and spouse)
✓ All documents must be submitted by October 31, 2014 for students enrolled in courses for Fall 2014 and by March 1, 2015 for students beginning enrollment in Spring 2015.

Submit Forms To: Missouri S&T
Student Financial Assistance office
G-1 Parker Hall, 300 W. 13th Street
Rolla, MO 65409-0250

Phone: 573-341-4282 or 1-800-522-0938
Fax #: 573-341-4274
Email: SFA@mst.edu

Student’s last name

Student’s current address

City

State

Zip code

Daytime phone number (include area code)

Date of birth

Missouri S&T student ID# 

List the people whom you and your spouse will support between July 1, 2014 and June 30, 2015. Include yourself, your spouse, and your dependent children (if you provide more than half of the support). Include other people as part of your family only if they lived with you and received more than half of their support from you (or your spouse) at the time you completed your financial aid application AND they will continue to receive more than half of their support from July 1, 2014 - June 30, 2015.

<table>
<thead>
<tr>
<th>Full name</th>
<th>Age</th>
<th>Relationship to student (Parent, brother/sister, etc.)</th>
<th>If this person will be enrolled in a degree or certificate program at least half-time between July 1, 2014 and June 30, 2015, print the name of the college</th>
</tr>
</thead>
<tbody>
<tr>
<td>1)</td>
<td></td>
<td>STUDENT</td>
<td>Missouri S&amp;T</td>
</tr>
<tr>
<td>2)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>3)</td>
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<tr>
<td>6)</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

If there are more than six family members, attach a list of these people.
Student’s (and spouse, if married) Income to be verified - Please check one of the following that apply to you:

___ Check here if you (and spouse) used the IRS Data Retrieval tool when filing your FAFSA.

___ Check and submit your 2013 IRS Tax Return Transcript if you did not use the IRS Data Retrieval tool when filling out the FAFSA. (Supporting documentation is required, see page 4 on how to request your 2013 IRS Tax Return Transcript)

___ Check here if married and filed separate federal tax returns. Both student and spouse must submit their 2013 IRS Tax Return Transcripts. (Supporting documentation is required, see page 4 on how to request your 2013 IRS Tax Return Transcript)

___ Check if you (and spouse) will not file and are not required to file a 2013 Federal Income Tax return.

If you did not file and are not required to file a 2013 Federal Income Tax return, list below your employer(s) and any income received in 2013 and include a copy of your W-2 or other earnings statements. If none, enter ‘none’. Please provide a statement explaining how you support yourself (and dependents if applicable)

________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________
________________________________________________________________________________________________________
$________________________$________________________

Student’s (Spouse) Other Information to be verified:

___ Check if someone in your household received Food Stamps-Supplemental Nutrition Assistance Program (SNAP) in 2012 and/or 2013.

___ Check if student (or spouse) paid Child Support in 2013 and complete the following:

<table>
<thead>
<tr>
<th>Name of Person Who Paid Child Support</th>
<th>Name of Person to Whom Child Support was Paid</th>
<th>Name of Child for Whom Support was Paid</th>
<th>Amount of Child Support Paid in 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td>$</td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
<td>$</td>
</tr>
</tbody>
</table>
Do not leave any blanks. Enter $0 if appropriate.

### Untaxed Income

**Calendar Year 2013**

<table>
<thead>
<tr>
<th>Student</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S only. <strong>Do NOT include code DD</strong>.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Child support <strong>received</strong> for all children. Don't include foster care or adoption payments.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). <strong>Do not include</strong> the value of on-base military housing or the value of a basic military allowance for housing.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). <strong>DO NOT INCLUDE ROLLOVERS</strong>.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). <strong>DO NOT INCLUDE ROLLOVERS</strong>.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Veteran’s non-education benefits such as Disability, Death Pension, or Dependency &amp; Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Other untaxed income not reported, such as workers’ compensation, disability, etc. Also include the untaxed portions of health savings accounts from form 1040- Line 25. <strong>Do not include</strong> extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent whose financial information is not reported on this form and is not part of a legal child support agreement. This also includes distributions to you, the student, from a 529 plan that is owned by someone other than you or your parents (such as your grandparents, aunts, and uncles).</td>
<td>XXXXXX</td>
</tr>
</tbody>
</table>

### Additional Financial Information

**Calendar Year 2013**

<table>
<thead>
<tr>
<th>Student</th>
<th>Spouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Combat pay or special combat pay. Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).</td>
<td>$</td>
</tr>
<tr>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Earnings from work under a cooperative education program offered by a college (Co-op).</td>
<td>$</td>
</tr>
</tbody>
</table>

### Sign and Date this Form

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse’s signature is optional.

Student _____________________________ Date _____________ Cell Phone _____________

Spouse _____________________________ Date _____________ Phone _____________

**WARNING:** If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.
Missouri S&T Verification Policy
(This page is for your information. Please retain for your records.)

Any student who completes a Free Application for Federal Student Aid (FAFSA) may be chosen for a verification review. The verification process entails the review of tax documents and household information to ensure the accuracy of the FAFSA application.

Missouri S&T Student Financial Assistance Office (SFAO) staff will verify all mandatory items identified by the U.S. Department of Education (household size, the number in college, number of exemptions, adjusted gross income, taxes paid, untaxed income, untaxed IRS distributions, education credits, IRA deductions, tax exempt interest, receipt of food stamps and child support paid) In addition, the SFAO can verify discretionary items.

SFAO staff must resolve any conflicting information before disbursing financial aid. Applicants whose financial aid information requires reprocessing, based on the verification process, will have corrections electronically processed by the SFAO staff. These corrections will generate an updated Student Aid Report which will be sent to the student by the CPS. The Expected Family Contribution (EFC) may change based on the corrections made. If conflicting information is discovered after aid is awarded or disbursed, SFAO staff must resolve the conflicting information and the student will be required to repay aid received in excess of his/her eligibility. All conflicts must be resolved regardless of whether the student was selected for verification or not.

REQUIRED DOCUMENTS FOR PROOF OF INCOME, FOOD STAMPS, AND CHILD SUPPORT PAID.

PROOF OF INCOME:

The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web at www.FAFSA.gov. The student can log into the 2014-2015 FAFSA and select “Make FAFSA Corrections,” and navigate to the Financial Information section of the form. From there, follow the instructions to determine if you are eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student’s FAFSA. A step-by-step video on how to complete the IRS Data Retrieval can be found on our website at http://sfa.mst.edu/video

If you are unable to make the correction on your FAFSA, you must request a IRS Tax Return Transcript of your 2013 tax return from the Internal Revenue Service (IRS), free of charge, in one of three ways...

1. Online: www.irs.gov Click “Get Transcript for My Tax Records”. You can now view and print your transcript immediately. To view it now, click on “Get Transcript Online”. You will need to create an account if you do not have one created. Once created, click on “Higher Education/Student Aid” button. The Return Transcripts will be highlighted. Click on the correct Tax Filing Year (2013) to view your transcript. You are able to print it or save it. You can then fax, email, or mail it to us. (Make sure to order “RETURN TRANSCRIPT” and NOT THE “ACCOUNT TRANSCRIPT”)

2. Telephone: by calling 1-800-908-9946 and follow the prompts.


   ➢ If you used the IRS Data Retrieval Tool when filing your FAFSA you do not need to provide an IRS tax return transcript from the IRS.

   ➢ The 1040, 1040A and 1040EZ tax return forms are no longer used as acceptable proof of income.

FOOD STAMPS-SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP):

Documentation can be requested from the college to resolve any conflicting information. Documentation from the agency that issued the food stamps benefits will need to be provided to the school, if requested.

CHILD SUPPORT PAID:

Provide a statement signed by the individual who paid child support certifying the amount of child support paid, the name of the person to whom child support was paid and the name of the children for whom child support was paid.