



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

**2022-2023 Financial Aid Year
 Dependent Special Circumstance Review**

Last Name (Student)	First Name	M.I.
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Daytime Phone Number (include area code)	Missouri S&T Student ID #
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Please indicate all the circumstances that may apply to your situation. These forms and documentation can be scanned and uploaded, 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 your family’s current or future income is less than or different than in the 2020 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 2022-2023 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, both the parent and student will receive the request via both the parent’s and the student’s 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 yours and your parents’ 2020 IRS Tax Return Transcripts.
- Verification Worksheet for Dependent 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 Parent after filing

Note: Income and assets on the parents’ 2020 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 divorce)

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

Original 2020 benefit statement listing total amount received

Revised 2021 or 2022 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 2022-2023. Please download, complete, and attach the Elementary and Secondary Tuition Verification Form from sfa.mst.edu/resources/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, 2022 and Dec. 31, 2023 (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 4: Income Protection Allowance

Number in parents’ household, including student (FAFSA/SAR #72)	Number of college students in the household (FAFSA/SAR #73)				
	1	2	3	4	5
2	\$19,630	\$16,270	not applicable	not applicable	not applicable
3	\$24,440	\$21,100	\$17,740	not applicable	not applicable
4	\$30,190	\$26,830	\$23,490	\$20,130	not applicable
5	\$35,620	\$32,260	\$28,920	\$25,560	\$22,220
6	\$41,670	\$38,310	\$34,970	\$31,610	\$28,270

Note: For each additional household member, add \$4,700.
For each additional college student (except parents), subtract \$3,340.

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 2022 taxable and non-taxable income & benefits

2022 U.S. Income earned from work	Parent 1	\$ _____	Student	\$ _____
{January 1 st - December 31 st }	Parent 2	\$ _____		
Estimated 2022 totals:		\$ _____		\$ _____

2022 other taxed and untaxed:

Complete the following as it applies to you

	Parent	Student
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 2022 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: _____

Parent 1's signature: _____ Date: _____

Parent 2's signature: _____ Date: _____

Parent's Name: _____

Daytime phone: _____

Cellphone: _____ Email: _____

Address: _____

Return form to Student Financial Assistance

**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)





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**2022-2023 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

- Complete all sections of this worksheet in **full**. **Incomplete forms will be returned.**
- Student and parent(s) must use their 2020 Federal Income Tax for the 2022-2023 academic year. The easiest way to provide this information is to use the IRS Data Retrieval Tool (DRT) to transfer your 2020 tax information to your 2022-2023 FAFSA, if you have not already. **See instructions attached or go to: sfa.mst.edu/resources/forms/**
- All documents must be submitted by the following deadlines:
 Fall 2022 Enrollment: October 31, 2022
 Spring 2023 Enrollment: March 1, 2023
- 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

Full Name	Age
Write the names of the people in your parent(s)' household in the chart below: 1. Include yourself as the student. 2. Include your parent(s): Parent #1 and Parent #2 • <i>If your parents are divorced</i> , list the parent you lived with the most during the last 12 months. If you did not live with one parent more than the other, indicate the parent who provided more than half of your support during the last twelve months. • <i>If your parent is remarried</i> , include step-parent . • <i>If your parents are unmarried but live together</i> , list one as Parent #1 and the other as Parent #2 . 3. Include your parent(s)' other children , if your parents provide more than half of their support between July 1, 2022, and June 30, 2023, or if the children would be required to provide parental information if they were completing a 2022-2023 FAFSA. 4. Include other dependents if they now live with your parent(s) and your parent(s) will continue to provide more than half of their support through June 30, 2023.	Write the age of each family member in the chart below.
	Relationship
	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 (excluding parents) who will be enrolled in a degree, diploma, or certificate program at an eligible postsecondary educational institution at least half-time at any time between July 1, 2022, through June 30, 2023.
Full Name	Age
	Relationship
	College
	Missouri S&T
	Parent #1

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

Student Information (all applicants)

Check only on box below regarding STUDENT information

- a. I filed a 2020 Federal Tax Return and used the IRS DRT when completing the FAFSA.
- b. I filed a 2020 Federal Tax Return and will provide a Federal Tax Return Transcript from the IRS or a signed copy of the 2020 income tax return and applicable schedules.
- c. I was not employed, did not have income, and am not required to file a 2020 Federal IRS Tax Return.
- d. *I was employed and had income but am not required to file a 2020 Federal Tax Return.

***COMPLETE ONLY IF BOX D ABOVE IS CHECKED:** Students who did not file a 2020 Federal Tax Return are required to submit a copy of ALL W-2(s) for 2020 from each employer. List all 2020 employers and related earnings below.

Name of Employer	Amount Earned in 2020

If more space is required, attach a separate page.

Parent(s)' Information

Check only on box below regarding PARENT information

- a. I filed a 2020 Federal Tax Return and used the IRS DRT when completing the FAFSA.
- b. I filed a 2020 Federal Tax Return and will provide a Federal Tax Return Transcript from the IRS or a signed copy of the 2020 income tax return and applicable schedules.
- c. *I was not employed, did not have income, and am not required to file a 2020 Federal IRS Tax Return.
- d. *I was employed and had income but am not required to file a 2020 Federal Tax Return.

***COMPLETE ONLY IF BOX C or D ABOVE IS CHECKED:** Parents who did not file a 2020 Federal Tax Return are required to submit a Verification of Non-Filing Letter from the IRS and ALL W-2(s) from each employer. List all 2020 employers and related earnings below. See the last page of this document for requesting a Verification of Non-Filing Letter. Each parent who did not file a 2020 Federal Tax Return must sign below where **Signature Required Only if Non-Tax Filers** is indicated.

Name of Non-Filer	Name of Employer	Amount Earned in 2020

If more space is required, attach a separate page.

***Each parent who did not file a 2020 Federal Tax Return must sign here.**

*Parent 1 Signature Required Only if Non-Tax Filer _____

*Parent 2 Signature Required Only if Non-Tax Filer _____

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 2022-2023 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 Assistance

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)



DATA RETRIEVAL INSTRUCTIONS

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

- Click **Link To IRS**. (**Note:** If you have already used the IRS DRT to transfer your tax return information into your application, click the “View option to link to the IRS” hyperlink.)
- 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.)
- Your FAFSA will be saved and you will be transferred to the IRS Web site.
- On the IRS Web site, enter the requested information exactly as it appears on your tax return. If you get an error that there’s no match, double check your information, including the exact mailing address on your return.
- Once authenticated with the IRS, you will be provided with information surrounding your IRS tax information. You can either transfer your information from the IRS, or choose to return to FAFSA on the Web.

If you use the IRS DRT to transfer your tax return information from the IRS, the information will not display on your FAFSA. For your protection, the answer to each question is replaced with “Transferred from the IRS.”

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 Parent (not filing a joint return) who did not work or did work, but did not file a 2020 Federal Income Tax Return. For the 2022-2023 academic year any parent or independent student who is a Non-Filer is required to provide a Verification of Non-Filing Letter from the IRS and all 2020 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;">ONLINE</p> <ul style="list-style-type: none"> • Go to www.irs.gov • Select Get Your Tax Record - You will have 2 options • Click “Get Transcript Online” • Log In OR Sign Up for an account • Select a reason you need a transcript: Higher Education/Student Aid • Click “GO” • Select the year of the Return Transcript needed: 2020 • Your transcript is ready to download! • Click “Get Transcript by Mail” • Enter Social Security Number, Date of Birth, Street Address, Zip Code. Select Continue • Type of Transcript = Return Transcript • For Tax Year = 2020 • Click on Submit (Your transcript will arrive within 10 business days.)
<p style="text-align: center;">BY PHONE</p> <ul style="list-style-type: none"> • Call the IRS at 1-800-908-9946 • Enter your social security number • Enter street address numbers • Option 2 (Tax Transcript) • Enter year: 2020 • No Customer File Number needed <p>Your transcript will arrive within 10 business days.</p>	<p style="text-align: center;">BY MAIL</p> <ul style="list-style-type: none"> • Complete Form 4506-T or Form 4506T-EZ • Both forms are available online at www.irs.gov/individuals/get-transcript • Mail to the address indicated on the form