



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

**2023-2024 Financial Aid Year
 Dependent 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 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 2021 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 2023-2024 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 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.

- Complete Verification at mst.verifcationgateway.org
- 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' 2021 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 2021 benefit statement listing total amount received
- Revised 2022 or 2023 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 2023- 2024 academic year. 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, 2023, and Dec. 31, 2024 (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 #69)	Number of college students in the household (FAFSA/SAR #70)				
	1	2	3	4	5
2	\$21,200	\$17,580	not applicable	not applicable	not applicable
3	\$26,400	\$22,800	\$19,170	not applicable	not applicable
4	\$32,610	\$28,980	\$25,380	\$21,750	not applicable
5	\$38,480	\$34,850	\$31,240	\$27,610	\$24,010
6	\$45,010	\$41,380	\$37,770	\$34,140	\$30,540

Note: For each additional household member, add \$5,080.
For each additional college student (except parents), subtract \$3,610.

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 2023 taxable and non-taxable income & benefits

2023 U.S. Income earned from work	Parent 1	\$ _____	Student	\$ _____
{January 1 st - December 31 st }	Parent 2	\$ _____		
Estimated 2023 totals:		\$ _____		\$ _____

2023 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 2023 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)

