

2026-2027 Change in Circumstance Form for Independent Undergraduate Students



Prior to submitting this form, you must:

- Submit the FAFSA (Free Application for Federal Student Aid) at StudentAid.gov and review your results.
- Complete any outstanding financial aid documents for Illinois State by reviewing your To Do list at My.IllinoisState.edu.

Information and Instructions for Completing this Form:

1. Students with a -1500 Student Aid Index (SAI) are not eligible to complete this process.
2. Only submit this form and provide documentation if your situation meets one or more of the circumstances outlined.
3. Check the circumstance(s) that apply and provide the required documentation. *A written explanation is required if you are unable to submit all the required documentation.*
4. We are not able to estimate business or seasonal income. In this situation, we require a 2026 Federal tax return transcript, and our office will complete an 'end of year review'. Please submit this form and documentation once your 2026 Federal taxes have been filed.
5. Please submit photocopies of your documents as we are unable to return originals.
6. The change in circumstance review process may take up to six weeks.

STUDENT NAME: _____
Last First M.I.

UID: _____ TELEPHONE: _____
(University Identification Number on ID Card or Admission Letter)

ADDRESS: _____
Street City State Zip

CIRCUMSTANCES THAT AFFECT STUDENT/SPOUSE

Check the categories that apply to the student/spouse and submit supporting documentation.

- Unemployment:** Student/Spouse must have earned money in 2025, lost his/her job in 2026, and been unemployed for at least 10 weeks during 2026.

Student Name _____ **Layoff/Termination Date** _____
Has Student started another job? No _____ Yes _____ Date Hired _____

Spouse Name _____ **Layoff/Termination Date** _____
Has Spouse started another job? No _____ Yes _____ Date Hired _____

Documentation Required:

- Submit a copy of the letter of separation/termination or letter from previous employer on company letterhead stating effective date and the circumstances under which you or your spouse left their employment; and

- Submit unemployment benefits statement from state agency stating start and end dates, gross weekly amount, and total amount of benefits or their denial of benefits letter; and
- Submit proof of severance pay received, 401K, IRA, stocks/bonds, pensions, or other assets converted to cash; and
- Submit a copy of your and your spouse's 2025 Tax Return Transcript from IRS.gov.

Significant decline in income from 2024 to 2026: The reduction must reflect a significant decrease in income from 2024 total income reported on the FAFSA. Student/Spouse must have earned money in 2024 and experienced a significant decrease in resources that is the result of disability, natural disaster, retirement, change in employment, or other catastrophic event.

- Student: type of income lost _____ Year Lost _____
- Spouse: type of income lost _____ Year Lost _____

Documentation Required:

- Submit a letter explaining the situation; and
- Submit a copy of two of the most current pay statements showing gross year-to-date wages from each job worked for both student and spouse; and
- Please submit a copy of your 2025 or 2026 Federal Tax Return Transcript from IRS.gov for the year you indicated above before this form will be processed.

Lump Sum/ One Time Payment / ROTH IRA Conversion

Documentation Required:

- Submit documentation explaining the circumstance behind the payment or conversion; and
- Submit documentation showing the amount(s) removed/converted and the amounts available as resources.
- Submit your 2025 or 2026 Federal Tax Return Transcript from IRS.gov for the year that does not include the lump sum/one-time/conversion income.

Loss of Child Support: Child support ended on this date (mm/dd/yy)_____

Documentation Required:

- Submit proof of the amount of child support received in 2025 (copy of divorce decree, cancelled checks, etc.); and
- Submit legal document declaring the date the child support ended.

Separation or Divorce after the 2026-2027 FAFSA was filed:

Date of separation/divorce (mm/dd/yy)_____

*Please note that if you are an independent student due to marriage and you do not meet any other qualification on the FAFSA to continue being independent you will now be considered a dependent student and will be required to invite your parent contributor(s).

List the members of your household that physically reside with you or for which you provide over 50% of their support. Use a separate sheet of paper if necessary.

Name	Age	Relationship to you
_____	_____	_____
_____	_____	_____
_____	_____	_____

Documentation Required:

- Submit a copy of legal separation/divorce papers or a copy of each parent's rental lease or home mortgage payment or utility bill addressed to each parent at their residence; and
- Submit proof of spousal support and/or child support received and/or anticipated in 2026; and
- Submit a physically signed copy of the 2024 federal tax return with all schedules, and all 2024 W2s/1099s

Death of Spouse: Date of Loss (mm/dd/yy)_____

Documentation Required:

- Submit a copy of the death certificate or obituary; and
- Submit a copy of 2024 federal 1040 tax form and schedules, or 2024 tax return transcript from IRS.gov
- Submit a copy of all 2024 W-2s/1099s, or each of your 2024 wage and income transcripts from IRS.gov.

- Medical or Dental Expenses Paid by your Family in either 2024 or 2025:** You must be able to document that your family paid over 11% of their total income (Adjusted Gross Income) in medical and/or dental expenses, that were medically necessary, from their personal resources in 2024 or 2025. **Do not report payments covered by insurance or payments from business or Flex Spending accounts.** Only report those expenses that would qualify for itemization on a personal Federal Tax Return.

Documentation Required:

- **Complete Medical/Dental Documentation Form** (found on our website) along with copies of your proof of payments in 2024 or 2025. Do not submit notice of benefits or account statements unless they document personal payments made by your family. If you will have continuing medical expenses throughout the 2026 year, please wait until the end of the 2026 year to submit documentation.
- Please submit a copy of your 2024 Federal Tax Return Transcript from IRS.gov if expenses are from 2024.

Other Circumstances Not Covered by this Form:

Documentation Required:

- Submit a letter explaining the situation along with supporting evidence; and
- Any other supporting documentation that you may have of the expenses incurred.

