Special Circumstances Review Request 2019-20
for admitted or current University of Puget Sound students

Student Name: ___________________________  ID: ___________________________

Last First Puget Sound ID

Please Note: Special circumstances cannot be reviewed until a student has been admitted to Puget Sound. If your FAFSA has been selected for verification, we cannot review your special circumstances until verification is complete.

Step 1 of 3: Circumstances and Documentation

Please check the boxes most relevant to your special circumstances, and include supporting documentation.

<table>
<thead>
<tr>
<th>Type of Circumstance</th>
<th>Documentation Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss of income</td>
<td>• Data Retrieval Tool import or 2017 Tax Transcript*</td>
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<tr>
<td></td>
<td><strong>AND</strong></td>
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<tr>
<td></td>
<td>• Estimated total 2019 income from all sources, with copies of all year to date paystubs and/or profit and loss statements, retirement benefits statement, etc.</td>
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<tr>
<td>One-time income in 2017</td>
<td>• Data Retrieval Tool import or 2017 Tax Transcript*</td>
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<td></td>
<td><strong>AND</strong></td>
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<tr>
<td></td>
<td>• Copy of first two pages of 2018 tax return OR copies of all year to date paystubs and/or profit and loss statements, retirement benefits statement, etc.</td>
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<tr>
<td>Extended family support</td>
<td>• Data Retrieval Tool import or 2017 Tax Transcript*</td>
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<td></td>
<td><strong>AND</strong></td>
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<td></td>
<td>• Summary of itemized monthly amounts (e.g., bank statement)</td>
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<tr>
<td>Out-of-pocket medical expenses</td>
<td>• Data Retrieval Tool import or 2017 Tax Transcript*</td>
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<td><strong>AND</strong></td>
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<td></td>
<td>• Billing statement(s) showing amount not covered by insurance</td>
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<tr>
<td>Private K-12 tuition payments for sibling(s)</td>
<td>• Data Retrieval Tool import or 2017 Tax Transcript*</td>
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<tr>
<td></td>
<td><strong>AND</strong></td>
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<tr>
<td></td>
<td>• Billing statement listing name of sibling and net payment amount after scholarships and financial aid</td>
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<tr>
<td>Educational loan payments (Parent PLUS or other)</td>
<td>• Data Retrieval Tool import or 2017 Tax Transcript*</td>
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<tr>
<td>Please note: we can only consider loans in current repayment.</td>
<td><strong>AND</strong></td>
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<tr>
<td></td>
<td>• Loan statement showing monthly payment amount</td>
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<tr>
<td>Other circumstances</td>
<td>• Data Retrieval Tool import or 2017 Tax Transcript*</td>
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<tr>
<td>Please note: we cannot consider regional cost of living, discretionary expenses, credit card debt, or college tuition expenses.</td>
<td><strong>AND</strong></td>
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<tr>
<td></td>
<td>• Supporting documentation relevant to circumstances</td>
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</tbody>
</table>

\*Required prior to any special circumstance review. Please refer to instructions on second page.
Step 2 of 3: Explanation

To help us better understand your circumstances, please include a brief explanation on a separate sheet.

Step 3 of 3: Acknowledgements and Signatures

Please read and check each acknowledgement, and provide at least one signature.

☐ I have completed the IRS Data Retrieval Tool process, or I am including a 2017 Tax Return Transcript (see below).

☐ I understand that additional documentation may be requested in order to complete a special circumstances review, and that further review time will be needed if additional documents are requested.

☐ I understand that there are no exceptions or extensions to tuition payment deadlines, regardless of the status of a special circumstances review.

☐ I understand that the outcome of a special circumstances review may not result in any additional aid.

☐ I understand that any financial aid adjustments resulting from a special circumstances review are limited by the adjusted EFC (Expected Family Contribution) as calculated by the FAFSA, as well as federal and institutional guidelines and the availability of funds.

☐ I understand that this review is only applicable to the 2019-20 aid year, and that a separate review is required for consideration of special circumstances for any subsequent aid year.

_________________________________________________________________________                       ________________________
Student Signature                                                           Date

_________________________________________________________________________                       ________________________
Parent Signature                                                            Date

IRS Data Retrieval Tool and IRS Tax Return Transcript Request Process

Option 1: IRS Data Retrieval Tool

The easiest way to verify your FAFSA data with accurate tax information is by using the IRS Data Retrieval Tool:

- Log in at www.fafsa.ed.gov, then click “Make FAFSA Corrections”
- In the Financial Information section, answer the eligibility questions and click Link to IRS.
- Proceed to IRS Site, enter the requested information, and click Submit, then review and click Transfer Now.
- Complete the process on the “Sign and Submit” tab of your FAFSA.

Option 2: Tax Return Transcript

If you are not able to use the Data Retrieval Tool, you must provide a 2017 Tax Return Transcript:

- Request a Tax Transcript via automated telephone at 1-800-908-9946
- Request a Tax Transcript online at www.irs.gov/individuals/get-transcript