



Special Circumstances Review Request 2021-22

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.

Type of Circumstance		Documentation Required
<input type="checkbox"/>	Loss of income (for any reason including change in employment due to coronavirus)	<input type="checkbox"/> FAFSA DRT, 2019 Tax Return, or 2019 Tax Transcript* AND <input type="checkbox"/> Estimated total 2021 income from all sources, with copies of all year to date paystubs and/or profit and loss statements, retirement benefits statement, etc.
<input type="checkbox"/>	One-time income in 2019	<input type="checkbox"/> FAFSA DRT, 2019 Tax Return, or 2019 Tax Transcript* AND <input type="checkbox"/> Copy of first two pages of 2020 tax return OR copies of all year to date paystubs and/or profit and loss statements, retirement benefits statement, etc.
<input type="checkbox"/>	Extended family support	<input type="checkbox"/> FAFSA DRT, 2019 Tax Return, or 2019 Tax Transcript* AND <input type="checkbox"/> Summary of itemized monthly amounts (e.g., bank statement)
<input type="checkbox"/>	Out-of-pocket medical expenses	<input type="checkbox"/> FAFSA DRT, 2019 Tax Return, or 2019 Tax Transcript* AND <input type="checkbox"/> Billing statement(s) showing amount not covered by insurance
<input type="checkbox"/>	Private K-12 tuition payments for sibling(s)	<input type="checkbox"/> FAFSA DRT, 2019 Tax Return, or 2019 Tax Transcript* AND <input type="checkbox"/> Billing statement listing name of sibling and net payment amount after scholarships and financial aid
<input type="checkbox"/>	Educational loan in current repayment (Parent PLUS or other)	<input type="checkbox"/> FAFSA DRT, 2019 Tax Return, or 2019 Tax Transcript* AND <input type="checkbox"/> Loan statement showing monthly payment amount

Please note we cannot consider regional cost of living, discretionary expenses, credit card debt, or college tuition expenses.

*Required prior to any special circumstance review. Please refer to instructions on second page.

- ❖ **COVID-19 Expense:** if your current student incurred an expense related to the disruption of campus operations due to the coronavirus and you would like to apply for an emergency financial aid grant, please visit www.pugetsound.edu/caresactfunds to complete the Emergency Funding Request Form.

STUDENT FINANCIAL SERVICES

1500 N. WARNER ST. #1039 • TACOMA, WA 98416-1039 • TEL 253.879.3214, 800.396.7192, FAX 253.879.8508 • SFS@PUGETSOUND.EDU

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 signatures below.

- I have completed the FAFSA DRT or I'm including 2019 Tax Return or 2019 Tax 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 2021-22 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 / IRS Tax Return / IRS Tax Transcript Request Process

Option 1: IRS Data Retrieval Tool (FAFSA DRT)

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 IRS Form 1040 Tax Return

- Provide first two pages of your IRS Form 1040 from your tax return.

Option 3: IRS Issued Tax Return Transcript

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

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