



Special Circumstances Review Request 2022-23

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 <i>(for any reason including change in employment due to coronavirus)</i>	<input type="checkbox"/> FAFSA DRT, 2020 Tax Return, or 2020 Tax Transcript* AND <input type="checkbox"/> Estimated total 2022 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 2020	<input type="checkbox"/> FAFSA DRT, 2020 Tax Return, or 2020 Tax Transcript* AND <input type="checkbox"/> Copy of first two pages of 2021 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, 2020 Tax Return, or 2020 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, 2020 Tax Return, or 2020 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, 2020 Tax Return, or 2020 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, 2020 Tax Return, or 2020 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.*

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 2020 Tax Return or 2020 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 2022-23 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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