



# Special Circumstances Review Request 2023-24

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	<input type="checkbox"/> FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript* AND <input type="checkbox"/> Estimated total 2023 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 2021	<input type="checkbox"/> FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript* AND <input type="checkbox"/> Copy of first two pages of 2022 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, 2021 Tax Return, or 2021 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, 2021 Tax Return, or 2021 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, 2021 Tax Return, or 2021 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, 2021 Tax Return, or 2021 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 2021 Tax Return or 2021 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 2023-24 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 <https://studentaid.gov/h/apply-for-aid/fafsa>, 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](http://www.irs.gov/individuals/get-transcript)

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