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.

<table>
<thead>
<tr>
<th>Type of Circumstance</th>
<th>Documentation Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Loss of income</td>
<td>☐ FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript*&lt;br&gt;AND □ 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.</td>
</tr>
<tr>
<td>□ One-time income in 2021</td>
<td>☐ FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript*&lt;br&gt;AND □ 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.</td>
</tr>
<tr>
<td>□ Extended family support</td>
<td>☐ FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript*&lt;br&gt;AND □ Summary of itemized monthly amounts (e.g., bank statement)</td>
</tr>
<tr>
<td>□ Out-of-pocket medical expenses</td>
<td>☐ FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript*&lt;br&gt;AND □ Billing statement(s) showing amount not covered by insurance</td>
</tr>
<tr>
<td>□ Private K-12 tuition payments for sibling(s)</td>
<td>☐ FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript*&lt;br&gt;AND □ Billing statement listing name of sibling and net payment amount after scholarships and financial aid</td>
</tr>
<tr>
<td>□ Educational loan in current repayment (Parent PLUS or other)</td>
<td>☐ FAFSA DRT, 2021 Tax Return, or 2021 Tax Transcript*&lt;br&gt;AND □ Loan statement showing monthly payment amount</td>
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</tbody>
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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 98407-1039  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