Special Circumstances Review Request 2020-21

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	
☐	Loss of income *(for any reason including change in employment due to coronavirus)*	☐	Data Retrieval Tool import or 2018 Tax Transcript* AND ☐ Estimated total 2020 income from all sources, with copies of all year to date paystubs and/or profit and loss statements, retirement benefits statement, etc.
☐	One-time income in 2018	☐	Data Retrieval Tool import or 2018 Tax Transcript* AND ☐ Copy of first two pages of 2019 tax return OR copies of all year to date paystubs and/or profit and loss statements, retirement benefits statement, etc.
☐	Extended family support	☐	Data Retrieval Tool import or 2018 Tax Transcript* AND ☐ Summary of itemized monthly amounts (e.g., bank statement)
☐	Out-of-pocket medical expenses	☐	Data Retrieval Tool import or 2018 Tax Transcript* AND ☐ Billing statement(s) showing amount not covered by insurance
☐	Private K-12 tuition payments for sibling(s)	☐	Data Retrieval Tool import or 2018 Tax Transcript* AND ☐ Billing statement listing name of sibling and net payment amount after scholarships and financial aid
☐	Educational loan in current repayment (Parent PLUS or other)	☐	Data Retrieval Tool import or 2018 Tax Transcript* AND ☐ 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 at least one signature.

☐ I have completed the IRS Data Retrieval Tool process, or I am including a 2018 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 2020-21 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 2018 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

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