

2022-2023 SPECIAL CIRCUMSTANCES APPEAL - INDEPENDENT

Directions - If you have extenuating circumstances that the standard federal formula of analyzing need does not consider, please complete this form and return it to our office. Processing time for these appeals can be up to four weeks.

In order to verify your income prior to adjusting it based on the circumstances you indicate below, **you will need to submit a Standard Verification Form (V1) along with your appeal**. This includes 2020 IRS Tax Transcripts if you did not use the IRS Data Retrieval Tool when you completed the FAFSA and a 2021 IRS Tax Transcript or signed 2021 Tax Return with all schedules. **You must also include a personal statement in the space provided. Incomplete appeals will not be processed, please include all requested items.**

Part A. Student Information						
Name (last,first, middle initial)		Student ID#	Phone (include area code)			
Part	B. Type of Special Circum	stance				
(x)		ne required documents. This includes a	personal statement.			
	Retirement: 1. Letter of separation from employer, 2. Copy of last pay stub showing earnings, 3. Statement of retirement benefits, 4. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 5. V1 Independent Verification Form 6. Complete a written statement explaining your circumstance.					
	Death of a Parent/Spouse: 1. Copy of death certificate or obituary notice with dates after FAFSA was filed, 2. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 3. Copy of 2020 and 2021 W2s for surviving parent, 4.V1 Independent Verification Form 5. Complete a written statement explaining your circumstance.					
	Loss of Employment due to Layoff of 1. Letter on employer company letterh 2. Proof of severance/buy-out package 3. Copy of unemployment benefits OF 4. Copy of last pay stub showing earn 5. Signed Copies of 2020 and 2021 IR 6. V1 Independent Verification Form 7. Complete a written statement explain	ead with last date of employment, and year-to-date income, a statement of ineligibility, angs, S Tax Returns and all schedules that were file	ed with the returns or IRS Tax Transcripts,			
	Change in Employment Status, from 1. Letter on employer company letterh 2. Documentation of year-to-date inco 3. If you reduced work hours to attend 4. Copy of last pay stub showing earns	n full-time to part-time, or reduction in wa ead with the change effective date, me, school, provide a statement to explain, ings, S Tax Returns and all schedules that were fil and				
	1. Letter regarding ending payments fr 2. Statement from the Court, including 3. Signed Copies of 2020 and 2021 IR 4. V1 Independent Verification Form 5. Complete a written statement explains. Non-recurring income - IRA or pen	pport, etc.: rom parent paying child support, stop dates and amounts, S. Tax Returns and all schedules that were fil ining your circumstance. sion distribution, inheritance, etc.:	ed with the returns or Tax Transcripts,			
	 Documentation of income type and Documentation of how the funds we Signed Copies of 2020 and 2021 IR V1 Independent Verification Form Complete a written statement explain 	ere spent or invested, S Tax Returns and all schedules that were fil and	ed with the returns or Tax Transcripts,			

	Marital separation or divorce after the FASFA was filed:						
	1. Copy of divorce decree or documentation of separation (Separate Maintenance Agreement or attorney's letter),						
	2. Proof of separate residences,						
	3. Explanation of when divorce will be filed and when separation started,						
	4. Documentation verifying child support you are receiving for minor children,						
	4. Documentation verifying child support you are receiving for minor children, 5. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts,						
	5. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 6. Copy of 2020 and 2021 W2s for custodial parent,						
	7.V1 Independent Verification Form						
	8. Complete a written statement explaining your circumstance	e					
		stating the 2021-22 tuition minus scholarships/discounts; which					
	identifies the child by name and a written statement explainin						
	Non-reimbursed Medical/Dental Expenses:	g the request					
	1. Documentation of medical/dental expenses for 2021 or 202	22					
	2. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts with itemized deduction worksheet if applicable.						
	3. V1 Independent Verification Form						
	4. Complete a written statement explaining your circumstance	Δ					
	Other:						
	1. Supporting documentation related to your request.						
	2. Signed Copies of 2020 and 2021 IRS Tax Returns and all s	schedules that were filed with the returns or Tax Transcripts					
	3. V1 Independent Verification Form	senedules that were fired with the retains of Tax Transcripts.					
	4. Complete a written statement explaining your circumstance	<u>a</u>					
Dant							
Part	C. Required – Statement of Explanation (A	Attach separate sneet if needed.)					
D (D C 100 10						
Part D. Certification							
You must sign this form certifying that the information you provided is true. Misrepresentation of facts in connection with this form may be sufficient cause, in and of							
Student S	cancellation or repayment of financial aid, whenever discovered.	Date					
Stauciit S	D. C.	·····					



2022-2023 Verification Worksheet Independent

Mail: Saint Martin's University Student Financial Services Office 5000 Abbey Way SE Lacey, WA 98503 P: (360) 438-4397 F: (360) 412-6190

Your application has been selected for review in a process called "Verification." In this process, the information from your Free Application for Federal Student Aid (FAFSA) will be compared with you and your spouse's (if applicable) Federal IRS tax information as well as other financial documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach all required documents and submit to the Student Financial Services Office.

Last Name	First Name	M.I.	SMU ID Number	
Address (include apartment	number)		Date of Birth	
City	State	Zip	Phone number (include area code)	
	FAMILY	INFORMATION		
Name	Age	Relationship to you Self	College Attending Saint Martin's Univers	
Name	Age			

INCOME VERIFICATION INSTRUCTIONS

The easiest way to verify income is to use the IRS Data Retrieval Tool when completing or updating your FAFSA on the federal web site. If you did not use the IRS Data Retrieval Tool when completing or updating the 22-23 FAFSA, you should log back into the FAFSA and use the IRS Data Retrieval tool. If you need instructions to use the tool please visit our website and expand the HELP Forms section under the Financial Aid Forms section.

In you are unable to use the IRS tool; you must request a 2020 IRS Tax Return Transcript or provide a signed copy of your 2020 1040, 1040A or 1040EZ with all schedules. You can request a 2020 IRS Tax Return Transcript via www.irs.gov or call 1-800-908-9946. Be sure to request a 2020 Tax Return Transcript, NOT an Account Transcript. If you did not and will not file a 2020 Federal tax return, please check the appropriate box below.

	STUDENT	Γ INCOME (Please S	elect One Box)	
I used/wil	l use the IRS Data Retrieval proce	ss when completing/updati	ng the 2022-23 FAFSA.	
> Plea	ase indicate the date you used the	tool /will use the tool to tr	ansfer your 2020 Tax Filing	
			equested a 2020 IRS Tax Return Trans Verification section above for impor	
> Plea	ase indicate the date you requested	the 2020 IRS Tax Transci	ipt	
I will not	file and am not required to file a 2	2020 Federal tax return, bu	t received a 2020 W-2	
> Wri	ite in the amount you earned in 202	20 and enclose all of your	2020 W-2s. \$	
			d did not receive a W-2 in 2020. If you cS, even if you earned zero wages in	
➤ If y	ou earned wages in 2020 from odd	l jobs or other non-W2 job	s, you must report them below.	
➤ Am	ount Earned \$	Source of Inco	ome	
	CERTIFIC	CATIONS AND SIG	NATURES	
have read and ag	ree to comply with all verification ult in the application being filed	n policies as stated by the	complete and correct. I/We also ackn University. Failure to submit inforn or consideration and no federal aid for	nation in a timely
Student		Date	Spouse	Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, sentenced to jail, or both.