

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 Circumstance		
(x)	Check all that apply and submit the 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 or Termination: 1. Letter on employer company letterhead with last date of employment, 2. Proof of severance/buy-out package and year-to-date income, 3. Copy of unemployment benefits OR statement of ineligibility, 4. Copy of last pay stub showing earnings, 5. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or IRS Tax Transcripts, 6. V1 Independent Verification Form 7. Complete a written statement explaining your circumstance.	
	Change in Employment Status, from full-time to part-time, or reduction in wages: 1. Letter on employer company letterhead with the change effective date, 2. Documentation of year-to-date income, 3. If you reduced work hours to attend school, provide a statement to explain, 4. Copy of last pay stub showing earnings, 5. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 6. V1 Independent Verification Form and 7. Complete a written statement explaining your circumstance.	
	Loss of Other Income from child support, etc.: 1. Letter regarding ending payments from parent paying child support, 2. Statement from the Court, including stop dates and amounts, 3. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 4. V1 Independent Verification Form 5. Complete a written statement explaining your circumstance.	
	Non-recurring income - IRA or pension distribution, inheritance, etc.: 1. Documentation of income type and amount, 2. Documentation of how the funds were spent or invested, 3. Signed Copies of 2020 and 2021 IRS Tax Returns and all schedules that were filed with the returns or Tax Transcripts, 4. V1 Independent Verification Form and 5. Complete a written statement explaining your circumstance.	



Saint Martin's
UNIVERSITY

2022-2023
Verification Worksheet
Independent
(V1)

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.

STUDENT INFORMATION

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

Fill in the information below about the people you and your spouse (if applicable) will support between July 1, 2022 and June 30, 2023. **INCLUDE YOURSELF, YOUR SPOUSE (if applicable), YOUR CHILDREN AND ANY OTHERS WHO RECEIVE MORE THAN HALF OF THEIR SUPPORT FROM YOU.** List the name of the college others will be **attending if they are enrolled in a degree, diploma, or certificate program for at least six credits per term between July 1, 2022 and June 30, 2023.**

Name	Age	Relationship to you	College Attending
		Self	Saint Martin's University

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.

