



At Portland State University, we understand that while the Free Application of Federal Student Aid (FAFSA) is a helpful tool in determining a student's eligibility for financial assistance, it may not always accurately reflect the true financial situation of the student's family. If your family has an unusual or special circumstance you believe should be considered in assessing your eligibility for aid, our re-evaluation process provides a way for you and your parent(s) to inform us of the circumstances to be considered and allows us to determine if an adjustment can be made. Appeals for re-evaluation must be made in writing, include a detailed description of the circumstances as well as appropriate supporting documentation and be signed by both the student and parent.

The initial review of your Re-evaluation Appeal will be completed by a committee and may take up to two weeks. Be thorough and complete in providing all requested documentation as this will prevent processing delays. Once your appeal is reviewed, you will be notified via email of the committee's decision or if any additional documentation is necessary. Please keep in mind that submission of a Re-evaluation Appeal is specific to an academic year and does not guarantee an adjustment or increase to financial aid eligibility or assistance.

What May Qualify as a Special Circumstance?

- Loss or reduction of earned income from calendar year 2018 to calendar year 2019 due to change in employment
- Loss of benefits such as unemployment, alimony, or child support
- Loss or reduction of income due to separation, divorce or death of a parent
- Unusual or unexpected medical or dental expenses for a household member that are not reimbursed

What Doesn't Qualify as a Special Circumstance?

- Private school tuition for siblings unless enrollment is necessary due to disability
- Annual fluctuations of income due to loss of overtime or bonuses
- Personal consumer debt such as credit-card or car payments
- Exclusion of business income reported on personal tax return

If your family has unusual or special circumstances you wish to be considered in determining your eligibility for financial aid, please complete the Parent Re-evaluation Form and submit all supporting documentation requested.

Mailing Address:

Office of Student Financial Aid and Scholarships
Portland State University
PO Box 851
Portland, Oregon 97207-0851

Physical Address:

Fariborz Maseeh Hall
Portland State University
1855 SW Broadway
Portland, Oregon 97207-3295

Phone: (503) 725-3461
Fax: (503) 725-5965
Toll-Free: (800) 547-8887

Department use only: PRVL-O



Student's Name: _____ ID#: _____
 (Please print) Last First

| Select Circumstance | Documentation Required |
|--|---|
| <input type="radio"/> Loss or reduction of income due to change in employment or benefits | <ul style="list-style-type: none"> Personal statement (signed and dated) from your parent(s) detailing the change in financial situation A copy of your parent(s) 2018 IRS Tax Return Transcript (TRT) or signed 2018 IRS Tax Return A copy of your parent(s) 2019 IRS Tax Return Transcript (TRT) or signed 2019 IRS Tax Return Any additional documentation to substantiate your parent(s) change in circumstance such as, but not limited to, a letter of termination from an employer, legal statement of change in alimony or child support amount, or statement of reduction in social security benefits. |
| <input type="radio"/> Unexpected and unusual Medical and/or Dental Expenses | <ul style="list-style-type: none"> Personal statement (signed and dated) detailing your parent(s) circumstances Provide a statement from each medical, dental, or insurance provider documenting the amount your parent(s) paid <u>after</u> insurance between January 1, 2018 – December 31, 2018 <p>It is important to submit documentation which clearly demonstrates the amount paid after insurance. We ask that your parent(s) include a list of the out of pocket expenses along with the documentation so we can accurately calculate their medical and/or dental expenses.</p> |
| <input type="radio"/> Change in parent marital status since filing FAFSA: separated/divorced/widowed | <ul style="list-style-type: none"> A copy of your parent(s) 2018 IRS Tax Return Transcript (TRT) or signed 2018 IRS Tax Return A copy of your parent(s) 2018 IRS W2s or other income statements such as Schedule F, Schedule K-1 (1065), Schedule C, etc. Documentation of your parent's change in marital status such as proof of separate mailing addresses, updated lease agreements, separation/divorce decree, death certificate, etc. <ul style="list-style-type: none"> If your parent is unable to provide any documentation, please have them submit a signed statement explaining why they are unable to do so Change of Marital Status Form completed by your parent |

By signing this form, I certify the information provided on this form and all accompanying documentation to be accurate and complete to the best of my knowledge. I agree to submit additional documentation to support my appeal should the Office of Financial Aid & Scholarships make such a request. I understand that completing this form does not guarantee financial aid will be increased and that any revision based on this information does not guarantee the same adjustments will be made in future academic years.

Student Signature: _____ Date: _____
 (No typed signatures allowed)

Parent Name: _____ Parent Signature: _____ Date: _____
 (please print) (No typed signatures allowed)

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| | |
|---|-------------------|
| Student's Name: _____ (Please print) Last First | ID#: _____ |
|---|-------------------|

Change of Marital Status Form – to be completed by Parent

Step 1: Marital Status Update Information

What is your current marital status? Please check one below:

- Divorced
- Separated (even if you are still legally married)
- Widowed

When did this marital status begin? ____/____ (mm/yyyy)

Step 2: Asset Information

- Please list the net worth of assets in each category as of the date the FAFSA was completed. Net worth means the current value of the asset minus debts related to that same asset. Net worth is not the same as the income derived from the asset.
- If you are separated/divorced since filing the FAFSA, only report the net worth of your assets.
- Answer "0" for any category that does not apply to you. Values left blank will be considered incomplete.

| Asset | Net Worth (USD\$) |
|---|-------------------|
| What is your total current balance of cash, savings, and checking accounts? Do <u>not</u> include student financial aid. | \$ |
| What is the net worth of your investments, including real estate ? Do <u>not</u> include the home in which you live. | \$ |
| What is the net worth of your current businesses and/or investment farms ? Do <u>not</u> include a family farm or family business with 100 or fewer full-time or full-time equivalent employees. | \$ |

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Step 3: Household Size Information

Please complete this form by listing the people in your parent’s household and specifying those members who will be in college. Please refer to steps 1-4 to determine who to include the household and step 5 for number in college definition. Submit documentation using contact information below.

1. The student
2. The parent(s) reported on the FAFSA, even if the student doesn’t live with the parent(s). If the parent is remarried, include the stepparent.
3. The parent(s)’ other children if the parents will provide more than half of the children’s support from July 1st, 2020 through June 30th, 2021 **OR** if the other children would be required to provide parental information if they were completing a FAFSA for 2020-2021. Include children who meet either of these standards, even if the child does not live with the parents.
4. Other people if they now live with the parents **AND** the parents provide more than half of the other person’s support **AND** will continue to provide more than half of that person’s support through June 30th, 2021.
5. Identify in the space below information about any household member who is, or will be, enrolled at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1st, 2020 and June 30th, 2021, and include the name of the college.
 - a. **Do not include parents in the number in college.**
 - b. **Do not include any people in the number in college that are participating in high school/college dual enrollment programs.**

If more space is needed, provide a separate page with the student’s name and ID number at the top.

| Full Name | Age | Relationship to Student | College Name and PSU ID if Applicable | At least half time? (yes or no) |
|-----------|-----|-------------------------|---------------------------------------|------------------------------------|
| | | Student | Portland State University | Yes |
| | | | | |
| | | | | |
| | | | | |

By signing this form, you are certifying the information on the change of marital status form to be true and agree to submit additional documentation if requested.

Student Signature: _____ Date: _____
(No typed signatures allowed)

Parent Name: _____ Parent Signature: _____ Date: _____
(Please print) (No typed signatures permitted)

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