

2021-2022 Parent Re-Evaluation Request

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 the most recently completed tax year
- 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.

Student Information

First Name: _____

Last Name: _____

PSU ID #: _____

Kinds of Special Circumstances and Documentation

<input type="checkbox"/> 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 you or your parent(s) most recent IRS 1040 Tax Return or Tax Return Transcript. • 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="checkbox"/> Unexpected or 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 after insurance between January 1, 2019 – December 31, 2019 <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="checkbox"/> Change in parent marital status since filing FAFSA: separated, divorced, widowed	<ul style="list-style-type: none"> • A copy of your parent(s) 2019 IRS Tax Return Transcript (TRT) or signed 2019 IRS Tax Return • A copy of your parent(s) 2019 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. • If your parent is unable to provide any documentation, please have them submit assigned statement explaining why they are unable to do so • Change of Marital Status Form completed by your parent

Signatures

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: _____

Parent's Name (please print) _____

Parent Signature: _____ Date: _____

How To Submit This Form

The fastest way is the document uploader <https://www.pdx.edu/student-finance/forms>

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

Physical location: Fariborz Maseeh Hall (FMH), Portland State University, 1855 SW Broadway, Portland, Oregon 97207-3295

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

For financial aid office use only: PRVL-E