

2023-2024 FAFSA Re-Evaluation Request: Parent

The 2023/2024 FAFSA application is based on income from the 2021 federal tax year for all students and families. If you have special circumstances resulting in a change to your finances after 2021, the FAFSA reevaluation process provides a way for you to inform the PSU Financial Aid Office of your circumstances and appeal to be reconsidered for the financial aid programs.

The submission of a FAFSA and the appeal for reevaluation is specific to each academic year. Appeals are evaluated on a case by case basis and may not result in an adjustment or increase to financial aid eligibility.

Appeals for FAFSA reevaluation must be made to the University in writing, include a detailed description of the circumstances, include supporting documentation and be signed by the student and parent. Requests without supporting documentation will not be considered.

What May Qualify as a Special Circumstance?

Loss or reduction of income after 2021 due to a loss or 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 spouse

High medical or dental expenses that are not reimbursed

What Doesn't Qualify as a Special Circumstance?

Private school tuition for children 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 or windfall income reported on a personal tax return

Communication

Once your appeal is received by the PSU Financial Aid Office, your student can track the appeal status in their myPSU account (<https://my.pdx.edu/finances>). Your student will receive a message in the myPSU system if your appeal is incomplete, if other documentation or information is needed, and when a decision is made on your appeal.

Submitting An Appeal

Students must be admitted to the University and an appeal must be received by the PSU Financial Aid Office by the end of the eighth week of the current term of enrollment. Forms received after the end of the eighth week will be reviewed for the following term of enrollment. Appeals received after the student graduates or ceases to be enrolled at the University will not be considered.

Student Information

First Name: _____

Last Name: _____

PSU ID #: _____

Kinds of Special Circumstances and Documentation:

<p><input type="checkbox"/> I (parent/s) have special circumstances that resulted in a loss of income in 2023</p>	<p><input type="checkbox"/> Loss or reduction of income from work due to change in employment in 2023: Required documents:</p> <ol style="list-style-type: none">1. Statement: Submit a signed and dated personal statement detailing the circumstances which resulted in a change to your finances.2. Provide the date that the circumstance occurred: _____ (Month/Year)3. Document your circumstances: Provide documentation supporting the circumstances which resulted in a change to your finances such as a letter of termination from an employer.4. Updated Financial Documents: Submit a copy of your 2023 Tax Return Transcript (TRT) or a signed copy of your 2023 Income Tax Return with applicable tax schedules. <p><input type="checkbox"/> Loss or reduction of a financial benefit I was previously receiving in 2023: Required documents:</p> <ol style="list-style-type: none">1. Statement: Submit a signed and dated personal statement identifying the financial benefit that was reduced or has ended.2. Provide the date that financial benefit was reduced or ended : _____ (Month/Year)3. Documentation: Provide documentation showing the reduction or loss of the benefit, such as a statement of change in alimony, child support, social security benefits, unemployment benefits etc.
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<input type="checkbox"/> I (parent/s) had significant and unexpected medical or dental expenses	<p>Required Documents:</p> <ol style="list-style-type: none"> Statement: Submit a signed and dated personal statement detailing your circumstances regarding significant and unexpected medical/dental expenses. Documentation: Provide a statement from each medical, dental, or insurance provider documenting the amount you (parent/s) paid after insurance between January 1, 2021 – December 31, 2021. <p>It is important to submit documentation which clearly demonstrates the amount paid after insurance. We ask that you (parent/s) include a list of the out of pocket expenses along with the documentation so we can accurately calculate the medical and/or dental expenses.</p>
<input type="checkbox"/> I (parent) had a change to my marital status after I filed the FAFSA which has affected my household income	<p>Required Documents:</p> <ol style="list-style-type: none"> Financial Documents: A copy of your (parent/s) 2021 Tax Return Transcript (TRT) or signed copy of 2021 Income Tax Return with applicable Tax Schedules Financial Documents: A copy of your parent(s) 2021 IRS W2s, 1099s or other income documents such as Schedule F, Schedule K-1 (Form 1065), Schedule C, etc. that used to file their taxes. 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"> <input type="checkbox"/> Divorced: Submit a copy of your divorce decree. <input type="checkbox"/> Separated and No longer Living Together: Submit documentation of your change in marital status such as proof of separate mailing addresses or updated lease agreements. <input type="checkbox"/> Widowed: Submit a copy of a death certificate or obituary. 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 to be increased and that any revision based on this information does not guarantee the same adjustments to be made in future award 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

Change of Marital Status Form – to be completed by Parent

Student Information

First Name: _____

Last Name: _____

PSU ID #: _____

Step 1: Marital Status Update Information

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

- Divorced
- Separated and Longer Living Together (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 submitted**. 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. For more information on how to answer the asset question, please click [Asset definition](#)
- If you are separated/divorced/widowed 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 Type and Net Worth	Net Worth (USD\$)
What is your total balance of cash, savings, and checking accounts as of the day the FAFSA was submitted? Do not include student financial aid	\$
What is the net worth of your investments, including real estate as of the day the FAFSA was submitted? Do not include the home in which you live.	\$
What is the net worth of your businesses and/or investment farms as of the day the FAFSA was submitted? Do not include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.	\$

Step 3: Parent Household Size Information (completed by parent and student)

Part I: Parents in the Household

The divorced/separated/widowed parent

Full name	Age	Relationship to student

Part II: Your Parent's Children

List yourself. You, as a student, are always included in parent's household. List your parent's other children who will receive more than half of their support from your parent between July 1st, 2023 and June 30th, 2024 OR who would be required to provide parental information if they were completing a FAFSA for 2023-2024 award year. Include children who meet either of these standards, even if the child does not live with the parent.

Full Name	Age	Relationship to Student	Attending college at least half time (Y/N)	Name of the college they are attending
		Self	Y	PSU

Part III: Other People

Please list any other people, if they now live with your parent, and your parent provides more than half of their support and will continue to provide more than half of their support between July 1, 2023 and June 30, 2024.

Full Name	Age	Relationship to Student	Attending college at least half time (Y/N)	Name of the college they are attending

Signatures

By signing this form, you are certifying all the information to be true and complete and agree to submit additional documentation if requested.

Student Signature: _____ Date: _____

Parent Name: _____

Parent Signature: _____ Date: _____

How To Submit This Form

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

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