# Guide to the Oregon Student Aid Application (ORSAA)

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## ORSAA Support

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www.OregonStudentAid.gov
This is a guide to accompany the Oregon Student Aid Application (ORSAA), an application of the Higher Education Coordinating Commission’s Office of Student Access & Completion (OSAC). The guide addresses key sections and questions contained in the ORSAA.

Introduction to the Oregon Student Aid Application (ORSAA)
The ORSAA is an alternative to the Free Application for Federal Student Aid (FAFSA) for Oregon residents who are undocumented, including students who have DACA (Deferred Action for Childhood Arrivals) status. Both the FAFSA and the ORSAA open on October 1 each year.

You can learn more about the ORSAA on the OSAC website: www.OregonStudentAid.gov/fafsa-orsaa.aspx. You can also find this page by visiting www.OregonStudentaid.gov and selecting the “File the FAFSA or ORSAA” button.

The ORSAA is modeled off of the FAFSA. Although most questions in the ORSAA are the same as in the FAFSA, a few questions are slightly different, including several Oregon-specific questions that are used to determine eligibility for state grants and scholarships. All financial information must be entered manually by the student and parent. For help with the FAFSA, visit the Federal Student Aid website: https://studentaid.ed.gov/sa/.

Do NOT complete the ORSAA if you are a U.S. citizen or an eligible noncitizen with an Alien Registration number – these students should complete the FAFSA (fafsa.gov). International students who are studying in the U.S. on a student visa are NOT eligible for state or federal financial aid programs and should NOT complete the ORSAA. To learn more about non-U.S. citizens and financial aid eligibility, visit http://studentaid.ed.gov/sa/eligibility/non-us-citizens.

Note that there is a new version of the ORSAA as of 10/1/16. All students must create a new account, even if they filed an ORSAA before October 2016.

ORSAA & OSAC Programs
Undocumented students, including DACA students, are NOT eligible for federal financial aid (including the Federal Pell Grant), but they may be eligible for the OSAC-administered programs listed below. The ORSAA is required to apply; OSAC uses information from the ORSAA to calculate students’ award eligibility for state grants and scholarships.

The ORSAA is the required application for the following OSAC-administered financial aid programs:

- Oregon Opportunity Grant
- Oregon Promise Grant
- Certain OSAC Scholarships

Most OSAC-administered grants and scholarships have additional requirements and/or steps to apply. Visit www.OregonStudentAid.gov for more information about each program.
Security & Use of ORSAA Data
The ORSAA is used exclusively by the state of Oregon—not the federal government—to determine students’ eligibility for financial aid programs. The Office of Student Access and Completion shares a student’s ORSAA data only with the financial aid office at the school(s) the student lists on the ORSAA. Data from the ORSAA is private, secure information that is not shared with the federal government or other outside entities. The ORSAA is NOT a tool that is used to identify or deport undocumented individuals.

Guidance for DACA students
To apply for the Oregon Opportunity Grant, the Oregon Promise Grant, or participating OSAC scholarships, DACA students must complete the ORSAA. DACA students may also want to complete the FAFSA. Students should contact the financial aid office at their college to find out if their school wants them to file the FAFSA in order to qualify for institutional aid. Different colleges have different approaches: some may require DACA students to complete the FAFSA online, or a paper version of the FAFSA, to help determine aid at the college or university level.

Even if a DACA student has already submitted a FAFSA, the student must submit an ORSAA to be considered for state-administered financial aid: Oregon Promise, Oregon Opportunity Grant, and certain OSAC scholarships.

ORSAA Pre-Filter Tool
Before creating an account for the ORSAA, students will answer a few “pre-filter" questions to help determine if they should complete the ORSAA. Questions include:

- Do you have a Social Security number?
- Are you a US citizen or US national?
- Have you been granted DACA status?
- Have you lived in Oregon for at least 12 months before you will enroll in college?
- Are you an eligible noncitizen?

Based on their responses, students will be instructed to file the ORSAA or the FAFSA - or advised that they are not eligible for state aid via the ORSAA. The answers provided in the pre-filter tool are NOT saved; this is simply a tool for students and families to help determine if they should complete the ORSAA. The pre-filter is on the OSAC website at: http://oregonstudentaid.gov/PublicTools/FinancialAid/PreFilter.

After answering the pre-filter questions, visitors will be directed to the ORSAA (or the FAFSA), depending on their situation.

What-to-Bring Checklist
- Date of birth for student and parent(s)
- Email for student and parent(s)
- Most recent federal income tax returns, W-2s, and other records of money earned
- Bank statements for checking, savings, and other asset accounts
- Investment records, including 529 plans or other prepaid college plans (if applicable)
- Records of untaxed income (such as child support received and untaxed pensions)
- Driver’s license number (if you have one)
How to Complete the ORSAA
The following screen shots and instructions highlight certain sections and questions to help complete the ORSAA. Not all questions in the ORSAA are addressed here, but key points are highlighted.

Account Registration Page
First, a student must register with an account to access the ORSAA. Students should not use an email address from their school that will become inactive because the email address is also their ORSAA username. One secret/security question is required. The Social Security number or DACA number is optional. The student should leave this blank if they do not have one.

Students should keep a copy of their username, password, and the security question used to create the student account. They will need this information if they need to edit any of the ORSAA information – email address, adding a school, etc.
**Student Landing Page**

Once the student creates an account, this is the landing page they will see. To get started, select the blue “Start, edit or complete an application” icon under Actions, for the appropriate year.

Note that 2017-18 is the year that students should select, if they are seeking financial aid for college between July 1, 2017 - June 30, 2018 (this corresponds with the FAFSA year).

The icons in blue indicate the different actions that students can take with their application:

- Start, edit or complete an application
- View an application
- Invite a parent to sign an application
- Download an application
- Sign an application

The icons and status messages will change as the student works through each section of the ORSAA.
**Student Demographics**

The ORSAA begins with several basic questions about the student’s full name, gender, date of birth, address, and contact information. Optional questions ask for the student’s the driver’s license state and number, and social security or DACA number. If the student does not have a DACA or social security number, the student can leave this blank.

This section also asks about the student’s marital status, the number of members in the student’s household, and the student’s household number in college. For dependent students (generally not married, no children or dependents, and under age 24), enter “1” for the **Student’s Household Number of Family Members**. The student should only count him or herself here. Dependent students should also enter “1” for the Student’s Household Number in College. Students who are married, over age 24, and/or have dependents, should follow the instructions to enter the correct number here.

Note that in a later Parent Information section, dependent students will be asked to enter the total number of people in the household for the **Parent’s Household Number of Family Members**. For the Parent’s Household Number in College, the dependent student should count him or herself plus any additional students who are in the household. However, students should not count the parents themselves, even if they are also students.
Oregon State Information

Part I:

This is the second section of the application, after Student Demographics. These questions are different from the FAFSA because they relate to certain requirements for the state of Oregon. The first questions pertain to DACA status and high school or GED information.
Part II:

These questions pertain to state of residency, elementary and secondary school experience, and certain responsibilities of the applicant regarding permanent residency. Students must answer all of these questions if they wish to be considered for an Oregon Opportunity Grant.

Residency Information

Please answer the following questions related to your residency status.

Student’s State of Residence

OREGON

Provide the state where you reside.

Did you become a resident of the state before 01/01/2012?

- Yes
- No

Indicate if you became a resident of this state before January 1, 2012.

To be eligible for Oregon state grants and/or in-state tuition rates at Oregon public universities as a non-U.S. Citizen, you must certify that you meet all of the following conditions. Please respond to each of the following certification statements:

I certify that during each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, I attended an elementary or a secondary school in Oregon.

- Yes
- No

I certify that during each of the five years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, attended an elementary or a secondary school in any state or territory of the United States, the District of Columbia or the Commonwealth of Puerto Rico.

- Yes
- No

I certify that I received a high school diploma from a secondary school in Oregon or received the equivalent of a high school diploma.

- Yes
- No

Certification Regarding Permanent Residency Application and Related Responsibilities

In addition to school attendance requirements, to be eligible for Oregon in-state tuition rates and/or to be considered for Oregon state grants as a non-U.S. Citizen you must show an intention to become a citizen or a lawful permanent resident of the United States by submitting to the public institution you attend or plan to attend:

a. An official copy of my application to register with a federal immigration program or federal deportation deferral program or a statement of intent that I will seek to obtain citizenship as permitted under federal law; and

b. An affidavit stating that I have applied for a federal individual taxpayer identification number or other official federal identification document.

I certify that I intend to become a citizen or a lawful permanent resident of the United States and that I have provided the required documents indicated above to my school.

- Yes
- No
**Educational Plans**

These questions ask about the student’s expected grade level in college for the year when they are applying for financial aid, and the expected degree or certificate that they are seeking.

Current high school seniors or recent high school graduates should NOT select “Graduate student” here — this means that they have already completed college. Graduate students are NOT eligible for state grants (including Oregon Opportunity Grant) or Federal Pell Grants.
**Dependency Determination**

The ORSAA contains several questions that are used to determine students’ dependency status. These questions are identical to the FAFSA:

- Are you currently serving on active duty in the U.S. Armed Forces or are a National Guard or Reserves enlistee called into federal active duty for purposes other than training?
- Are you a veteran of the U.S. Armed Forces?
- At any time since you turned age 13, were both of your parents deceased, or were you in foster care or were you a dependent or ward of the court?
- Are you now or were you an emancipated minor (released from control by his or her parent or guardian) as determined by a court in your state of legal residence?
- Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?
- At any time on or after July 1, 2016, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless or was self-supporting and at risk of being homeless?
- At any time on or after July 1, 2016, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless or was self-supporting and at risk of being homeless?
- At any time on or after July 1, 2016, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or was self-supporting and at risk of being homeless?

Each dependency question on the application is accompanied by further details and definitions of terms. For more information on dependency status, please refer to the FAFSA guidelines: [https://studentaid.ed.gov/sa/fafsa/filling-out/dependency](https://studentaid.ed.gov/sa/fafsa/filling-out/dependency).

Based on the responses in this section, the student will be determined to be either dependent or independent. Dependent students are required to enter parent information in a later section.
Student Income & Tax Data
All of the financial information in this section pertains to the student (and spouse, if applicable). Financial information for the parent(s) is reported in the next section. The majority of income and tax return questions on the ORSAA pertain to 2 years prior to the financial aid year. Each question contains explanation and definition of terms within the application.

The following categories and items are included in this section of the application:

Tax Return Information
- Income Tax Return Status
- Tax Filing Status
- Type of Income Tax Return
- Eligibility to File 1040 A/EZ
- Adjusted Gross Income from Income Tax Return
- Taxes Paid from Income Tax Return
- Personal Exemptions from Income Tax Return
- Income Earned from Working
- Dislocated Worker Status

Federal Benefits Information
- Medicaid or Supplemental Security Income (SSI) Benefits
- Supplemental Nutrition Assistance Program (SNAP)
- Free or Reduced School Price Lunch
- Temporary Assistance for Needy Families (TANF) Benefits
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) Benefits

Assets
- Cash, Savings, and Checking Account Amounts
- Real Estate or Investment Net Worth
- Business or Farm Net Worth

Additional Financial Information
- Child Support Paid
- Need-Based Employment
- Grant or Scholarship Aid
- Combat Pay
- Co-op Earnings

Untaxed Income
- Pension Payments
- Child Support Received
- Military or Clergy Allowances
- Veterans Nongraduated Benefits
- Other Untaxed Income
- Other Non-Reported Money Received
Parent Information

In this section, dependent students provide information about their biological or adoptive parent(s), including marital status, household number (see page 7), social security number, email address, residency information. A parent who does not have a social security number can enter all zeros. One question asks about the parent’s “state of legal residency.” Even if the parent is an undocumented resident in the United States, they can enter the state where they currently live. If the parent became a resident of Oregon after January 1, 2012, the parent must provide the date that he/she established Oregon residency. The tax and financial questions in this section are identical to those in the Student Income and Tax Data section.

School List
Similar to the FAFSA, students must list the schools they are interested in attending so that schools can receive a copy of the ORSAA to determine financial aid packages. To be eligible for state grants, students must list at least one college or university in Oregon. To the best of their knowledge, students must indicate their housing plan for each school: on campus, with parents, or off campus/other.

The student can select up to 10 schools here. Students who would like to list more than 10 schools must log back into the ORSAA after submitting it, and change their school selections accordingly. They can delete schools and add more schools at this time.
Sign My Forms
After answering all questions in the ORSAA, the student can view a PDF version of their responses on the application. The student then signs electronically by providing their first and last name, password for the ORSAA account, and current city and state. Make sure that the computer meets all hardware and software requirements necessary for electronic signature.
Incomplete ORSAA
Once the student signs the ORSAA, they will return to the landing page. At this point, the student can check the status of the application here. If the student is dependent, a new message and icon will appear in the application status box: “Incomplete – Parent Signature Pending.” In the action box, the student should select the icon to invite a parent to sign the application.

![Oregon Student Aid Application (ORSAA)](image-url)
Parent Process

Choose Parent to Sign ORSAA

Both the dependent student AND a parent must sign the ORSAA. The parent cannot create an ORSAA account until after the student has signed the ORSAA electronically and sent the parent an invitation to sign the ORSAA.

After the student clicks the “invite parent” icon, the student will see a screen that asks the student to choose a parent to sign the ORSAA. The student should check to make sure the parent email address is correct or enter a new email parent address, if necessary. The student then selects one parent who will receive the invitation to sign. The parent must use an email address different from student.

Confirm Parent Selection

Once the student confirms the parent selection, an email invitation will be sent to the parent.
Parent Invitation Email

A few minutes after the student initiates the invitation to sign, the parent will receive an email inviting them to create an account. The link is only active for 72 hours. If the parent waits more than 72 hours to create an account and sign the student’s ORSAA, the student must go back to the ORSAA and re-invite the parent.

The parent creates an account by following the link. If the parent is using the same computer as the student, the student must first log out of the ORSAA completely before the parent can create an account.

Parent Account Creation

To verify their identity, all information that the parent enters must match what the student has entered. The parent must provide their date of birth, the last 4 digits of their social security number (or all zeros if they do not have an SSN), and the student’s date of birth. All of these must exactly match the information that the student provided on the ORSAA.

After verifying their identity, the parent registers for their ORSAA account by creating a user name, password, and security question.
Parent Landing Page

From the landing page, the parent will choose to review and sign the incomplete application.

![Image of Oregon Student Aid Application (ORSA)](image)

Parent Review & Electronic Signature

Before signing the ORSA, the parent must click through each section of the ORSA. They will have the opportunity to edit any information, or simply to click through and electronically sign at the end. The final page is for electronic signature.

![Image of electronic signature process](image)
**Completed ORSAA**

After the parent signs, the student can sign in and check the landing page to ensure that the ORSAA for the correct year is complete. This is the only place to confirm completion; no confirmation email will be sent to the student or parent once the ORSAA is complete.

If marked complete, this means that the student (and parent, if a dependent student) has electronically signed the ORSAA. No further action is necessary. The applicant may log in to their account later and update information if necessary (contact info, school selections, etc.). Next year, the student can log in with the same username and password to complete the ORSAA again. Just like the FAFSA, the ORSAA must be completed each year that the student is in school, in order to be eligible for financial aid.
ORSAA Support

Contact OSAC for support in English or Spanish:

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