Oregon State University Residency Affidavit How-to-Guide

This information is for admitted OSU students who are currently being assessed non-resident tuition and feel they meet the criteria to be considered for resident tuition. Full criteria may be found on the residency website: https://admissions.oregonstate.edu/residency

If you feel you meet the criteria, the next step is to fill out a residency affidavit. This can be found in your student self-service. Tips on how to fill out the docusign form are at the end of this document.

Please follow the steps below carefully.

It is important to fill out the affidavit accurately. Keep in mind that when you sign and submit your residency affidavit, you are affirming that all the information supplied by you in your affidavit is complete, true and correct. Filling out your affidavit accurately will also allow our office to advise you appropriately and can save you time in the affidavit review process.

When you are submitting a residency affidavit, the first thing you need to determine is if you are financially independent or financially dependent.

You are considered financially independent for residency purposes if you:
1. Are NOT claimed as a dependent on state and/or federal taxes in the immediately preceding tax year, will not be claimed as a dependent during the current tax year OR
2. Did not receive more than half of the support necessary to cover your expenses for the last calendar year, in cash or in kind, from another person or through school related aid such as Grants, Student Loans, or Scholarships. OR
3. You are married

If you are claimed as a dependent on taxes in the immediately preceding tax year or current year, you are considered financially dependent on the person claiming you.

If you are not claimed as a dependent on taxes in the immediately preceding tax year or current year, your next step is to estimate your total expenses for the calendar year. The Residency Office does not need an exact number, but, to the best of your ability, please estimate the total
monetary cost or value of the following: Tuition, rent, utility bills, phone bills, internet bills, groceries, gas, entertainment, clothes, car insurance, renter’s insurance, etc.

If you do not pay rent, think about roughly how much your living situation would cost if someone were paying for it. For example, a typical room rental in Corvallis, OR, might go for around $500/month at a minimum.

Next, determine how much you have earned through wages, unemployment benefits, or personal loans. If this amount is less than half of your total expenses for the year, you would not be considered financially independent, and should fill out the affidavit as a financially dependent student.

If you provide are not financially dependent, please fill out the affidavit as a financially independent student.

**Financially Independent Students**

**Section 1**

**Number 1:** Please fill this in with the term you are seeking residency classification keeping in mind that you cannot select a term for which the affidavit deadline has passed.

**Numbers 2– 8:** Fill this information out accurately.

**Number 9:** If you do not know what these terms are, or have not attended any institutions in Oregon, this likely does not apply to you, and you can select “No.”

**Number 10:** If you are not a citizen of the USA, be sure to submit a copy of your Permanent Resident Card, I-94 form, or other documentation reflecting your visa type or current immigration status with your affidavit.

**Number 11:** Examples of state or government assistance might include food stamps, unemployment, disability, COVID stimulus checks, etc.

**Number 12a:** Enter the amount you calculated earlier in this field for your total expenses

**Number 12b:** Fill out this grid as completely as possible. Student loans should go in the “Other sources of support”. You will likely be asked to provide documentation of the support indicated in this section. This might include W2 statements, cancelled checks or wired transfers from parents, and documentation of any loans you have taken out. It is important to know we ask that you redact ALL bank account numbers or identifying information apart from names before submitting any such information.
You may also submit any sale of personal or real property, inheritance, trust fund information, gifts, or other earnings.

**Section 2**

Select “No” for section A, and “Yes” for section B (independent) based off your earlier calculations.

You will be asked to submit a copy of your state and federal tax returns for the immediately preceding year. We do not need more than the first 2-5 pages for each of these documents. For federal taxes, this form is the 1040, which looks like this:
**Form 1040**
Department of the Treasury—Internal Revenue Service

For the year Jan. 1-Dec. 31, 2014, or other tax year beginning...

For the year 2014, ending... See separate instructions...

Your first name and initial: Samuel F

Your social security number: 123-45-6789

Taxpayer

Lastname: Taxpayer

Surname's social security number: 422-19-6875

Filing Status: Single

If you are married filing jointly, enter spouse's social security number above. Enter full name and marital status here.

Home address (number and street): 789 Tuxedo Drive

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Bronxville NY 10708

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want to opt out of this fund. Checking a box below will not change your tax refund.

Apr. no.

Foreign country name: Foreign province/state/country: Foreign postal code: Add numbers on lines above. Total number of exemptions claimed:

Exemptions:

- Self: If someone can claim you as a dependent, do not check box.
- Spouse: Enter spouse's SSN above

Box checked on lines 2 & 4b No. of children on line 2c who:

- You did not live with
- You do not have in your household
- Dependent on line 2c
- Not claimed by another

Income:

- Wages, salaries, tips, etc. Attach Form(s) W-2.
- Taxable interest. Attach Schedule B if required.
- Tax-exempt interest. Do not include on line 8a
- Ordinary dividends. Attach Schedule B if required.
- Qualified dividends.
- Taxable refunds, credits, or offsets of state and local income taxes.
- Alimony received.
- Business income or loss. Attach Schedule C or C-EZ.
- Capital gains or loss. Attach Schedule D if required.
- Other gains or losses. Attach Form 4797.
- IRA distributions.
- Taxable amount.
- Pensions and annuities.
- Taxable amount.
- Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E.
- Farm income or loss. Attach Form F.
- Unemployment compensation.
- Social security benefits.
- Taxable amount.
- Other income. Last type and amount.

Adjusted Gross Income:

- Educator expenses.
- Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2160 or 2166-EZ.
- Health savings account deduction. Attach Form 8889.
- Moving expenses. Attach Form 3903.
- Self-employed SEP, SIMPLE, and qualified plans.
- Self-employed health insurance deduction.
- Penalty on early withdrawal of savings.
- Alimony paid.
- Recipient's SSN.
- IRA deduction.
- Student loan interest deduction.
- Tuition and fees. Attach Form 8917.
- Domestic production activities deduction. Attach Form 8804.
- Add lines 23 through 36
- Subtract line 36 from line 22. This is your adjusted gross income.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. EAA REV 12/31/11 TWM
We will need the similar section for state tax returns, showing exemptions and dependents. You must redact ALL social security numbers on this document before submitting. You are also welcome to redact the names of any other individuals on this document.

If you are under the age of 24, you must also submit the same documents of your parents or legal custodian. Again, please redact all social security numbers on these documents, which should be no more than 2-5 pages long each.

We understand Washington residents will not have state tax returns. If your state does not require taxes, please upload a 1-2 sentence statement in the state tax section of the affidavit explaining this.

Section 3

Numbers 1-5: Fill this out accurately.

Number 6: If you own your house, please submit the first 1 or 2 pages of your home purchase agreement showing your name, the home address, and the date of purchase. In addition, please submit some supporting documentation showing continued presence at that location as needed, which may include property tax statements or utility bills. These should include the date, your name, and the home address.

If you rent your home, please submit the first 2-5 pages of your rental or lease agreement showing your name, the home address, and the dates of the rental agreement. If you do not have a rental agreement, you might also submit letters from your landlord or cancelled rent checks.

Please redact any social security numbers or bank account information if they are present on any of this documentation.

If you are/were experiencing housing insecurity during the 12 month period of time when you are attempting to establish residency, please submit a word document briefly explaining this.

Number 7-8: Fill this out as accurately as possible

Number 9: We understand voter registration cards are not available in every state. A screenshot or any document showing your name and the state you are registered to vote in will be sufficient.

Number 10-11: Please submit the most recent version of these documents

Number 12: Please see the section above on taxes.
Number 13-14: Please answer these as accurately as possible.

The notary requirement is permanently waived. Please sign the document here.

**Financially Dependent Students**

**Section 1**

**Number 1:** Please fill this in with the term you are seeking residency classification keeping in mind that you cannot select a term for which the affidavit deadline has passed.

**Numbers 2 – 8:** Fill this information out accurate.

**Number 9:** If you do not know what these terms are, or have not attended any institutions in Oregon, this likely does not apply to you, and you can select “No.”

**Number 10:** If you are not a citizen of the USA, be sure to submit a copy of your Permanent Resident Card, I-94 form, or other documentation reflecting your visa type or current immigration status with your affidavit.

**Number 11:** Examples of state or government assistance might include food stamps, unemployment, disability, COVID stimulus checks, etc.

**Number 12a:** Enter the amount you calculated earlier in this field for your total expenses

**Number 12b:** Fill out this grid as completely as possible. Student loans should go in the “Other sources of support”. If you are not claimed as a dependent on taxes for the immediately preceding tax year, you will likely be asked to provide documentation of the support indicated in this section. This might include W2 statements, cancelled checks or wired transfers from parents, and documentation of any loans you have taken out. It is important to know we ask that you redact ALL bank account numbers or identifying information apart from names before submitting any such information.

You may also submit any sale of personal or real property, inheritance, trust fund information, gifts, or other earnings.

**Section 2:**

Select “Yes” for A (dependent) and “No” for B (independent) based off your earlier calculations.
You will be asked to submit a copy of your parent or legal guardian’s state and federal tax returns for the immediately preceding year. We do not need more than 2-5 pages for each of these documents. For federal taxes, this form is the 1040, which looks like this:
Form 1040
Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return

For the year Jan. 1-Dec. 31, 2014, or other tax year beginning
See separate instructions.

Your first name and initial
Samuel F

Last name
Taxpayer

IRA, or joint return, spouse's first name and initial
Felicity

Last name
Taxpayer

Home address (number and street). If you have a P.O. box, see instructions.
789 Tuxedo Drive

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions).
Bronxville NY 10708

Foreign country name

Foreign province/state/country

Foreign postal code

Filing Status
1 Single
2 Married filing jointly (even if only one had income)
3 Married filing separately. Enter spouse's SSN above and check the box
4 Head of household (with qualifying person). (See instructions.) If
5 Qualifying widow(er) with dependent child
Check only one box.

Exemptions
6a Youself. If someone can claim you as a dependent, do not check box 6a      2
6b Spouse   2

Dependants:
8b First name

Last name
(3) Dependent's social security number
(4) Dependent's relationship to you
(5) $14,050 if qualifying for child tax credit

Cyril T Taxpayer
123-45-1234     Son            2

Heidi W Taxpayer
123-23-3245     Daughter          2

Sydney D Taxpayer
123-54-9876     Parent

Total number of dependents claimed
4

Income
7 Wages, salaries, tips, etc. Attach Form(s) W-2
8a Taxable interest. Attach Schedule B if required
8b Non-taxable interest. Do not include on line 8a
9a Ordinary dividends. Attach Schedule B if required
9b Qualified dividends
10 Taxable refunds, credits, or offsets of state and local income taxes
11 Alimony received
12 Business income or (loss). Attach Schedule C or C-EZ
13 Capital gain or (loss). Attach Schedule D if required. If not required, check here
14 Other gains or (losses). Attach Form 4797
15a IRA distributions
15b Taxable amount
16a Pensions and annuities
16b Taxable amount
17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E
18 Farm income or (loss). Attach Schedule F
19 Unemployment compensation
20a Social security benefits
20b Taxable amount
21 Other income. Last type and amount
22 Combine the amounts in the far right column for lines 7 through 21. This is your total income
23 Educator expenses
24 Certain business expenses of reservists, performing artists, and
fee-based government officials. Attach Form 2166 or 2166-EZ
25 Health savings account deduction. Attach Form 8889
26 Moving expenses. Attach Form 3903
27 Deductible part of self-employment tax. Attach Schedule SE
28 Self-employed SEP, SIMPLE, and qualified plans
29 Self-employed health insurance deduction
30 Penalty on early withdrawal of savings
31a Alimony paid
31b Recipient's SSN
32 IRA deduction
33 Student loan interest deduction
34 Tuition and fees. Attach Form 8917
35 Domestic production activities deduction. Attach Form 8804
36 Add lines 23 through 35
37 Subtract line 36 from line 22. This is your adjusted gross income

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. 8AA

RE: 123114 TTM

Form 1040 (2014)
You must redact ALL social security numbers on this document before submitting. You are also welcome to redact the names of any individuals other than yourself and your guardian(s) on this document. You are also welcome to redact the income listed on this document if you would like.

We will need the similar section for state tax returns, showing exemptions and dependents. You must redact ALL social security numbers on this document before submitting. You are also welcome to redact the names of any other individuals on this document.

We understand Washington residents will not have state tax returns. If your state does not require taxes, please upload a 1-2 sentence statement in the state tax section of the affidavit explaining this.

Section 3

Numbers 1-5: Your parent or the person upon whom you are financially dependent should fill this out as accurately. This is not to be completed by spouse.

Number 6: If your parent or legal guardian owns their house, please submit the first 1 or 2 pages of their home purchase agreement showing their name, the home address, and the date of purchase. In addition, please submit some supporting documentation showing continued presence at that location as needed, which may include property tax statements or utility bills. These should include the date, your parent or legal guardian’s name, and the home address.

If your parent or legal guardian rents their home, please submit the first 2-5 pages of their rental or lease agreement showing their name, the home address, and the dates of the rental agreement. If your parent or legal guardian does not have a rental agreement, you might also submit letters from your landlord or cancelled rent checks.

Please redact any social security numbers or bank account information if they are present on any of this documentation.

If you are/were experiencing housing insecurity during the 12 month time period when you are attempting to establish residency, please submit a word document briefly explaining this.

Number 7-8: Your parent or legal guardian should fill this out accurately.

Number 9: We understand voter registration cards are not available in every state. A screenshot or any document showing your parent or legal guardian’s name and the state they are registered to vote in will be sufficient.

Number 10-11: Please submit the most recent version of these documents
Number 12: Please see the section above on taxes.

Number 13-14: Please answer these accurately.

The notary requirement is permanently waived. Please sign the document here, and ask your parent or guardian to sign below yourself.

**Active Duty Military**

Please fill out the affidavit depending on your financial status (independent or dependent) above. In addition, please submit a copy of your order assigning you to active duty.

**Veterans**

Please fill out the affidavit depending on your financial status (independent or dependent) above. In addition, please submit a copy of your ERB and documentation of established domicile in Oregon.

**Tribal Affiliation**

Please fill out the 4 pages of the affidavit as accurately as possible. Then, with the affidavit, submit a copy of your Tribal Enrollment confirmation. You do not need to submit any other documentation.

**Navigating to the Docusign Form**

1. Login to your MyOregonstate account
2. Click on Academics Tab
3. Click on My Student Records
4. Click on the Main Menu Tab at the top left of your screen
5. Click on “Admissions”
6. Select either the “independent” or “dependent” affidavit based on the information above.
7. Click “Initiate Request”
8. This will send you an email confirming you have begun the affidavit process. You can use the email to complete the form, or you can continue in self-service by clicking “click here to sign admissions residency affidavit (In/Dependent) Form Now)”
   a. Option 1:
   
   b. Option 2:

Filling out the Docusign Form
Step 1: Login to Docusign with your OSU email address

![DocuSign Log In](image)

Step 2: Click “Sign”

![DocuSign Signature](image)

Step 3: Read the message at the top, then click “Continue”

Step 4: Fill out pages 2 and 3 of the affidavit. Some fields are mandatory, and some require documentation. Use the previous information in this guide to assist you in determining which documents you should attach.

Step 5:
If you are financially independent, fill out pages 4 and 5, then click “finish.”
If you are financially dependent, click “finish.” You will be sent an additional email which will ask you to enter the email address for the person you are dependent on as the next “Responsible Person.” When you click “send,” the affidavit will be directed to this individual to complete pages 4 and 5.

**Step 6:**
If you are financially independent, you should receive two emails confirming receipt of your affidavit. One will come from Docusign, and one will come directly from the residency office.

If you are financially dependent, your “Responsible Person” should click “finish” to finalize the affidavit. You will then receive two emails confirming receipt of your affidavit. One will come from Docusign, and one will come directly from the residency office.

**Step 7:** The residency office will be emailing you at your OSU-issued email address to request additional information, or to let you know if a determination has been reached.