

Oregon State University Residency Affidavit How-to-Guide

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Overview

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:

For the year Jan. 1-Dec. 31, 2014, or other tax year beginning . . . , 2014, ending . . . , 20

Your first name and initial: **Samuel P** Last name: **Taxpayer** Your social security number: **123-45-6789**

If a joint return, spouse's first name and initial: **Felicity Q** Last name: **Taxpayer** Spouse's social security number: **432-19-8765**

Home address (number and street). If you have a P.O. box, see instructions. **789 Tuxedo Drive** Apt. no. **▲** Make sure the SSN(s) above and on line 6c are correct.

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/county Foreign postal code

Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. You Spouse

Filing Status

1 Single
 2 Married filing jointly (even if only one had income)
 3 Married filing separately. Enter spouse's SSN above and full name here. ▶
 4 Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
 5 Qualifying widow(er) with dependent child

Check only one box.

Exemptions

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

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input type="checkbox"/> if child under age 17 qualifying for child tax credit (see instructions)
Cyril T	Taxpayer	123-45-1234	Son	<input type="checkbox"/>
Heidi W	Taxpayer	123-23-2345	Daughter	<input type="checkbox"/>
Sydney D	Taxpayer	123-54-9876	Parent	<input type="checkbox"/>

If more than four dependents, see instructions and check here

Boxes checked on 6a and 6b: **2**
 No. of children on 6c who: **2**
 • lived with you
 • did not live with you due to divorce or separation (see instructions)
 Dependents on 6c not entered above: **1**
 Add numbers on lines above ▶ **5**

Income

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	82,250.
8a	Taxable interest. Attach Schedule B if required	8a	127.
b	Tax-exempt interest. Do not include on line 8a. 8b 543.		
9a	Ordinary dividends. Attach Schedule B if required	9a	196.
b	Qualified dividends 9b 196.		
10	Taxable refunds, credits, or offsets of state and local income taxes	10	
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	94,273.
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13	11,039.
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions 15a	b Taxable amount 15b	
16a	Pensions and annuities 16a	b Taxable amount 16b	
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits 20a	b Taxable amount 20b	
21	Other income. List type and amount	21	
22	Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶	22	187,885.

Adjusted Gross Income

23	Educator expenses	23	
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
25	Health savings account deduction. Attach Form 8889	25	
26	Moving expenses. Attach Form 3903	26	
27	Deductible part of self-employment tax. Attach Schedule SE	27	6,660.
28	Self-employed SEP, SIMPLE, and qualified plans	28	17,523.
29	Self-employed health insurance deduction	29	
30	Penalty on early withdrawal of savings	30	
31a	Alimony paid b Recipient's SSN ▶	31a	
32	IRA deduction	32	
33	Student loan interest deduction	33	
34	Tuition and fees. Attach Form 8917	34	
35	Domestic production activities deduction. Attach Form 8903	35	
36	Add lines 23 through 35	36	24,183.
37	Subtract line 36 from line 22. This is your adjusted gross income ▶	37	163,702.

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:

For the year Jan. 1-Dec. 31, 2014, or other tax year beginning . . . , 2014, ending . . . , 20

Your first name and initial: **Samuel P** Last name: **Taxpayer** Your social security number: **123-45-6789**

If a joint return, spouse's first name and initial: **Felicity Q** Last name: **Taxpayer** Spouse's social security number: **432-19-8765**

Home address (number and street). If you have a P.O. box, see instructions. **789 Tuxedo Drive** Apt. no. **▲** Make sure the SSN(s) above and on line 6c are correct.

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/county Foreign postal code

Presidential Election Campaign
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. You Spouse

Filing Status

1 Single
 2 Married filing jointly (even if only one had income)
 3 Married filing separately. Enter spouse's SSN above and full name here. ▶
 4 Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
 5 Qualifying widow(er) with dependent child

Check only one box.

Exemptions

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

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input type="checkbox"/> if child under age 17 qualifying for child tax credit (see instructions)
Cyril T	Taxpayer	123-45-1234	Son	<input type="checkbox"/>
Heidi W	Taxpayer	123-23-2345	Daughter	<input type="checkbox"/>
Sydney D	Taxpayer	123-54-9876	Parent	<input type="checkbox"/>

If more than four dependents, see instructions and check here

Boxes checked on 6a and 6b: **2**
 No. of children on 6c who: **2**
 • lived with you
 • did not live with you due to divorce or separation (see instructions)
 Dependents on 6c not entered above: **1**
 Add numbers on lines above ▶ **5**

Income

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	82,250.
8a	Taxable interest. Attach Schedule B if required	8a	127.
b	Tax-exempt interest. Do not include on line 8a. 8b 543.		
9a	Ordinary dividends. Attach Schedule B if required	9a	196.
b	Qualified dividends 9b 196.		
10	Taxable refunds, credits, or offsets of state and local income taxes	10	
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	94,273.
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13	11,039.
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions 15a	b Taxable amount 15b	
16a	Pensions and annuities 16a	b Taxable amount 16b	
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits 20a	b Taxable amount 20b	
21	Other income. List type and amount	21	
22	Combine the amounts in the far right column for lines 7 through 21. This is your total income ▶	22	187,885.

Adjusted Gross Income

23	Educator expenses	23	
24	Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ	24	
25	Health savings account deduction. Attach Form 8889	25	
26	Moving expenses. Attach Form 3903	26	
27	Deductible part of self-employment tax. Attach Schedule SE	27	6,660.
28	Self-employed SEP, SIMPLE, and qualified plans	28	17,523.
29	Self-employed health insurance deduction	29	
30	Penalty on early withdrawal of savings	30	
31a	Alimony paid b Recipient's SSN ▶	31a	
32	IRA deduction	32	
33	Student loan interest deduction	33	
34	Tuition and fees. Attach Form 8917	34	
35	Domestic production activities deduction. Attach Form 8903	35	
36	Add lines 23 through 35	36	24,183.
37	Subtract line 36 from line 22. This is your adjusted gross income ▶	37	163,702.

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.

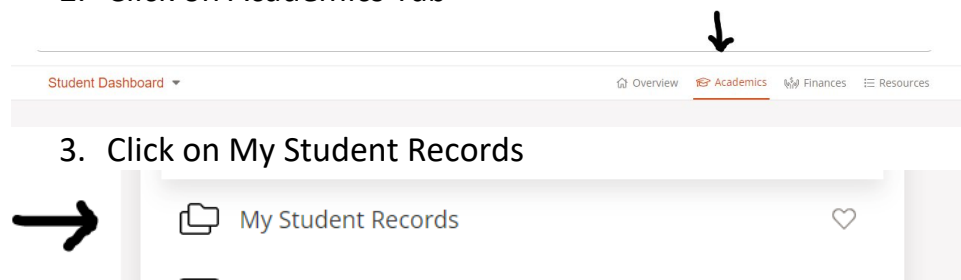
Veterans

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

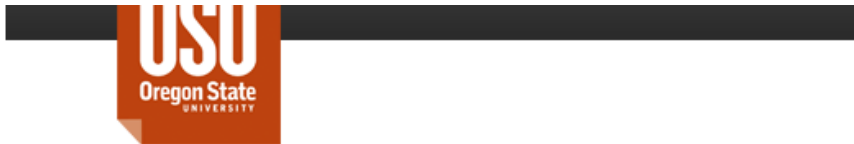
Regardless of if you are financially dependent or independent, use this form. Simply fill out the 1 page affidavit. Then, with the affidavit, submit a copy of your Tribal Enrollment confirmation. You do not need to submit any other documentation.

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



[Main Menu](#) [Faculty & Advisors](#) [Personal Information](#)

Search

Student Records

- [MyDegrees](#)
Monitor your academic progress toward degree completion. (Pop-ups must be enabled for MyDeg
- [Standard Enrollment Verification: National Student Clearinghouse](#)
- [View Holds](#)
- [Final Grades](#)
- [View Unofficial Academic Transcript](#)
- [Order Official Transcript](#)

5. Click on “Admissions”
6. Click on “Oregon Tribal Residency Affidavits”



Admissions

- [Advance Tuition Deposit](#)
Electronically sign and pay your Advance Tuition Deposit or print the form to mail in.
- [START/Term Orientation Registration Form](#)
On-campus undergraduate degree-seeking students should click above to register for STA
Ecampus students should complete [online orientation](#).
- [Adding Degree Partnership Program \(DPP\)](#)
Currently enrolled undergraduate students who would like to add Degree Partnership Prog
- [Oregon Residency Affidavit \(Dependent\)](#)
Dependent Residency form for students applying as a dependent.
- [Oregon Residency Affidavit \(Independent\)](#)
Independent Residency form for students applying as independent.
- [Oregon Tribal Residency Affidavit](#)
Affidavit for enrolled members of federally recognized Native American tribes as listed in :



RELEASE: 8.9.1.3

7. Click “Initiate Request”

Search

Submit Oregon Tribal Residency Affidavit Form for:

[Redacted Name]

[Redacted Email]@oregonstate.edu

8. You can proceed with the affidavit immediately by selecting “click here to sign Oregon Tribal Residency Affidavit Form Now,” or you can navigate back to the affidavit at any time, using the email which will be sent to your OSU-issued email address.

Search

Oregon Tribal Residency Affidavit Form Submitted for:

[Redacted Name]

[Redacted Email]@oregonstate.edu

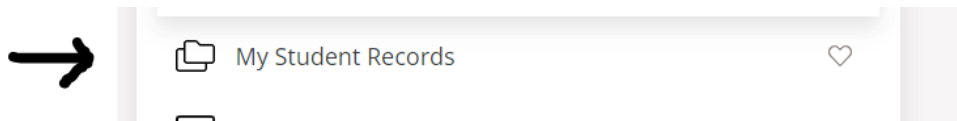
Your Oregon Tribal Residency Affidavit Form has been delivered to your email via DocuSign.

Navigating to the DocuSign Form

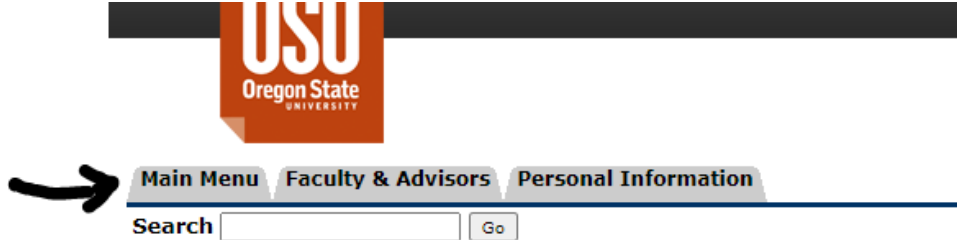
1. Login to your MyOregonstate account
2. Click on Academics Tab



3. Click on My Student Records



4. Click on the Main Menu Tab at the top left of your screen



Student Records

- [MyDegrees](#)
Monitor your academic progress toward degree completion. (Pop-ups must be enabled for MyDeg)
- [Standard Enrollment Verification: National Student Clearinghouse](#)
- [View Holds](#)
- [Final Grades](#)
- [View Unofficial Academic Transcript](#)
- [Order Official Transcript](#)

5. Click on “Admissions”

6. Select either the “independent” or “dependent” affidavit based on the information above.

Currently enrolled undergraduate students who would like to add Degree Part:

- [Oregon Residency Affidavit \(Dependent\)](#)
Dependent Residency form for students applying as a dependent.
- [Oregon Residency Affidavit \(Independent\)](#)
Independent Residency form for students applying as independent.

RELEASE: 8.9.1.3

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)”

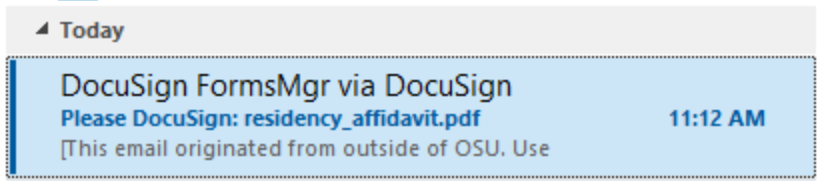
a. Option 1:

Your Oregon Residency Affidavit (Dependent) Form has been delivered to your email via DocuSign.

[Click Here to Sign Oregon Residency Affidavit \(Dependent\) Form Now](#)

[Return to Main Menu](#)

b. Option 2:



Filling out the DocuSign Form

Step 1: Login to DocuSign with your OSU email address

DocuSign®

Log In

Email *

NEXT

[No account? Sign up for free](#)

Step 2: Click “Sign”

Please DocuSign: residency_affidavit.pdf ⓘ

Envelope ID

From: DocuSign FormsMgr

Last change on 3/17/2022 | 09:17:16 am

Sent on 3/17/2022 | 09:17:16 am

! Need to Sign

SIGN MOVE MORE ▾

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

PRIVATE MESSAGE: If you are applying as a dependent, complete all fields on pages 2 and 3 and then sign the form and click FINISH. If you need to provide additional documentation, you can always merge files together to create a single document. You will get a subsequent email when you click on FINISH, this will enable you to enter the name and email for a person you are dependent on.

Please complete the form to the best of your abilities and select FINISH when complete.
[View Less](#)

Please review the documents below.

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.