# Guide to the

# **Oregon Student Aid Application (ORSAA)**

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# **ORSAA Support**

(541) 687-7400, option 3

ORSAAHelp@hecc.oregon.gov
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, TPS and U-Visa status. Both the FAFSA and the ORSAA open on **October 1** each year.

You can learn more about the ORSAA on the OSAC website: <a href="www.OregonStudentAid.gov/fafsa-orsaa.aspx">www.OregonStudentAid.gov/fafsa-orsaa.aspx</a>. You can also find this page by visiting www.OregonStudentaid.gov and selecting the FAFSA/ORSAA tab.

The ORSAA is modeled off 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.gov/help-center/contact.

Do *NOT* complete the ORSAA if you are a U.S. citizen or an eligible noncitizen with an Alien Registration number – students with these statuses should complete the FAFSA (<a href="https://studentaid.gov/fsa-id/sign-in/landing">https://studentaid.gov/fsa-id/sign-in/landing</a>). 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, <a href="https://studentaid.gov/understand-aid/eligibility/requirements/non-us-citizens">https://studentaid.gov/understand-aid/eligibility/requirements/non-us-citizens</a>

### **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 a 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 <a href="https://www.OregonStudentAid.gov">www.OregonStudentAid.gov</a> for more information about each program.

# Security & Use of ORSAA Data

The ORSAA is an Oregon developed application for students who are not eligible to complete the FAFSA. It is a confidential application that is used solely by the Higher Education Coordinating Commission (HECC) to qualify students for financial aid in Oregon. It is not used for federal financial aid purposes. Information that is shared with the HECC via the ORSAA is used only by the HECC and partner colleges, universities, and foundations in order to administer grants and scholarships. The HECC does not share data with any other agency, state or federal. The HECC will do everything within its authority and jurisdiction to protect the ongoing confidentiality of the ORSAA information.

#### **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 <u>"pre-filter" questions</u> 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?
- Are you an international student, or are you living in the United States with a valid visa or immigration status?
- Will you have lived in Oregon for at least 12 months prior to attending college?

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: <a href="https://osacapps.hecc.oregon.gov/orsaa-filter.aspx">https://osacapps.hecc.oregon.gov/orsaa-filter.aspx</a>. 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)		Investment records, including 529 plans or	
	Email addresses for student and parent(s)		other prepaid college plans (if applicable)	
	Prior 2 year of federal income tax returns		Records of untaxed income (such as child	
	(1040 form), and other records of money		support received and untaxed pensions)	
	earned			
	Records of current total of other asset			
	accounts, bank checking/savings and cash			
	Current net worth of investments, real			
	estate, business and investment farms			

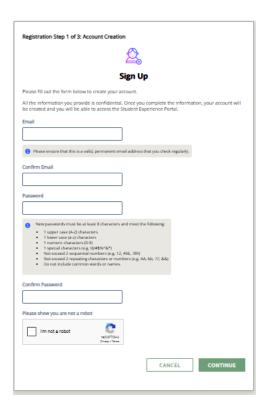
# How to Complete the ORSAA

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.

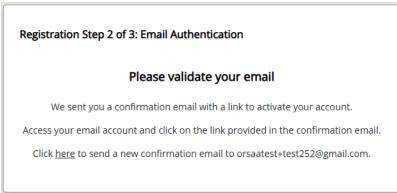
### **Account Registration Page**

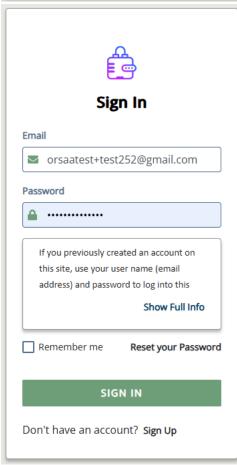
There are 3 steps in creating an account to access the ORSAA.

Step 1, student provides their personal email and confirms it. Students should not use a school/college issued email address as it may become inactive. A password will need to be created with the stated minimum requirements. The newly created password will need to get confirmed. Student will then click on "I'm not a robot", in which the student will get a number of pictures, or a "captcha." The student must select the correct pictures it asks for to move forward, then selects "Continue" to complete step 1.

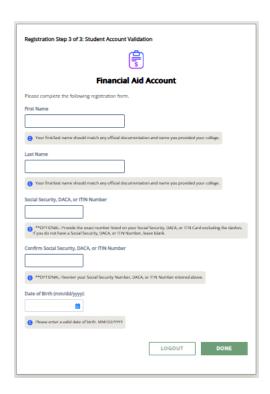


Step 2, student must validate their email address through an email authentication process. They will receive an email notification from <a href="mailto:noreply@osacstudentxqa.regenteducation.net">noreply@osacstudentxqa.regenteducation.net</a>. The student must follow the link that is provided in the email. The link will direct them back to the registration page, then student selects the "Continue" button. The sign in page will appear, the student enters their email and password they used to create their account and will click on the "SIGN IN" button.





Step 3, student enters their first name, last name, Social Security Number, DACA OR ITIN number, and date of birth. The Social Security Number, DACA and ITIN number is optional. The student should leave this blank if they do not have one. Students click on "Done" to finish their account registration.

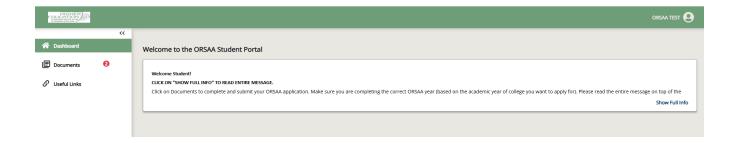


Students should keep a copy of their email address and password used to create the student account. They will need this information if they need to edit or update any of the ORSAA information – email address, adding a school, etc. Students should also print or save a PDF copy of the application created at the end of the ORSAA process.

# **Student Landing Page**

Once the student creates an account, this is the landing page they will see (see screenshot below). To get started, click on the "Documents" tab to complete and submit your ORSAA application. Make sure you are completing the correct academic year ORSAA document. The academic year is based on the school year the student plans to attend college.

For example, the student will need to complete the 2025-26 ORSAA document, if they are seeking financial aid for college between July 1, 2025 - June 30, 2026 (this corresponds with the FAFSA year as well).



The student can access the application by clicking on the "Review and Update" section.



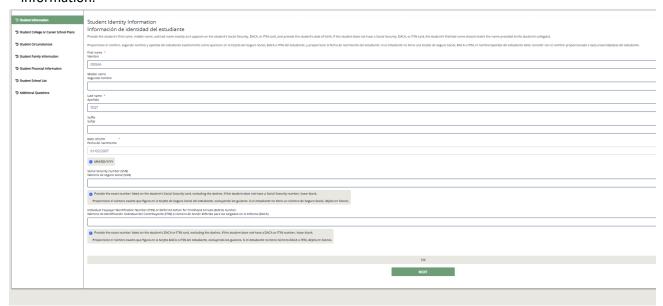
Then click 'Start, Edit or Complete a Form' button to begin the application.



#### **Student Information**

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 Social Security Number (SSN), DACA or ITIN number and phone number. If the student does not have a DACA, SSN or ITIN number, the student can leave this blank.

This section also asks about the student's marital status, high school completion status, state of residence, month and year student became a full-time resident of the state, and demographic information.



# **Student College or Career School Plans**

This section asks for the student's college grade level, if they have received a bachelor's degree, and if the student is pursuing an initial certification at the elementary or secondary level.

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 the Federal Pell Grant.



#### **Student Circumstances**

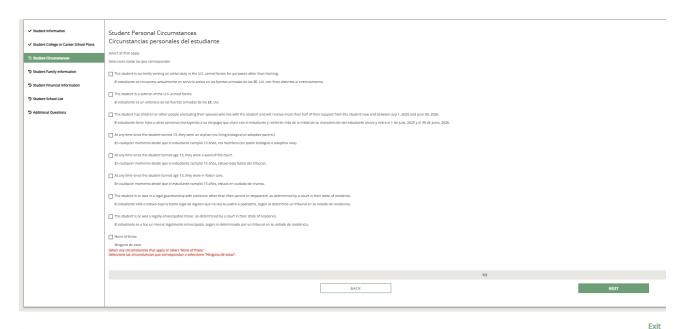
This section asks about the student's personal circumstances, student homelessness and unusual circumstances.

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

- The student is currently serving on active duty in the U.S. armed forces for purposes other than training
- The student is a veteran of the U.S. armed forces.
- The student has children or other people (excluding their spouse) who live with the student and will receive more than half of their support from the student now and between July 1, 2025 and June 30, 2026.
- At any time since the student turned 13, they were an orphan (no living biological or adoptive parent.)
- At any time since the student turned age 13, they were a ward of the court.
- At any time since the student turned age 13, they were in foster care.
- The student is or was in a legal guardianship with someone other than their parent or stepparent, as determined by a court in their state of residence.
- The student is or was a legally emancipated minor, as determined by a court in their state of residence.

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.gov/apply-for-aid/fafsa/filling-out/dependency.

Responses in this section will determine the student's dependency status, i.e. Dependent or Independent. Dependent students are required to enter parent information in a later section.

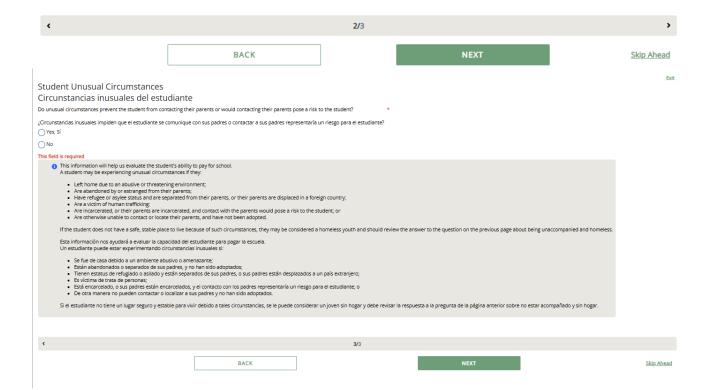


# Student Homelessness Estudiantes sin hogar

At any time on or after July 1, 2024, was the student unaccompanied and either (1) homeless or (2) self-supporting and at risk of being homeless?

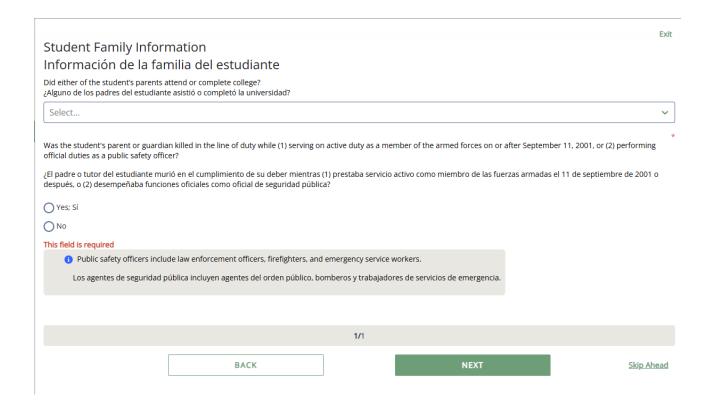
En cualquier momento a partir del 1 de julio de 2024, ¿estuvo el estudiante solo y (1) sin hogar o (2) autosuficiente y en riesgo de quedarse sin hogar?

Yes; Sí
No



# **Student Family Information**

This section asks information about parent(s)'s college completion, if any, and if a parent or guardian was killed in the line of duty.



#### **Student Financial Information**

All of the financial information in this section pertains to the student. Financial information for the parent(s) or spouse is reported in the parent/spouse financial information 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 an explanation and definition of terms.

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
- Foreign Income
- Eligibility to File 1040 A/B/D/E/F/H
- Adjusted Gross Income from Income Tax Return
- Taxes Paid from Income Tax Return
- Income Earned from Working
- Tax exempt interest income
- Earned Income credit (EIC)
- Education Credits

#### **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 Noneducational Benefits
- Other Untaxed Income
- Other Non-Reported Money Received

## **Student 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.

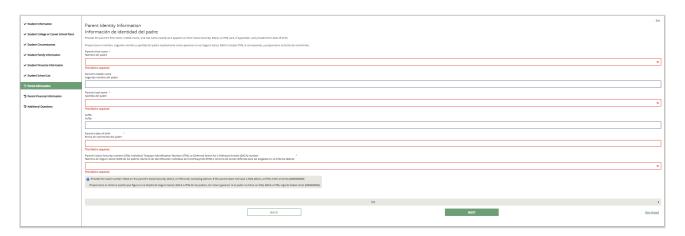
The student can select up to 20 schools in this section. Students can also add or delete schools after submitting it, by logging back in to edit the document.



#### **Parent Information**

In this section, dependent students provide information about their biological or adoptive parent(s), including marital status, household number, how many people in college, Social Security Number, email address, and residency information. A parent who does not have a SSN 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. The tax and financial questions in this section are identical to those in the Student Financial Information section.

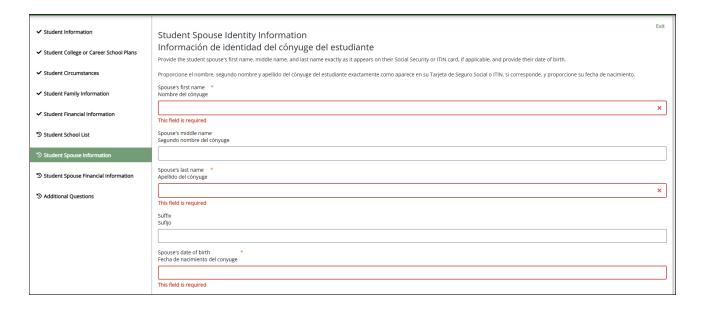
To help determine who to list as parent(s), refer to the FAFSA guidelines—Who's My Parent When I Fill Out My FAFSA? https://studentaid.gov/fafsa-apply/parents.



In the Parent Information section, dependent students will be asked to select how many people are in the parent's family. Include the parent (and spouse or partner,) the parent's dependent children (even if they live apart due to college enrollment,) and other people living with the parent now. Include these dependent children and other people only if the parent will provide more than half of their support between July 1 and June 30 of the academic year the student is applying for. 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.

# **Spouse Information**

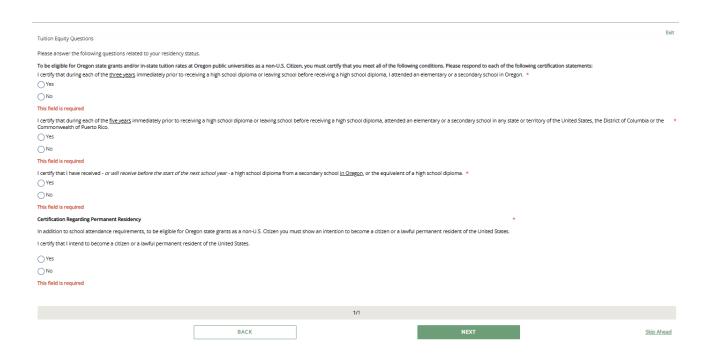
In the case the student is independent and married, in this section, the student will provide information about their spouse, including first and last name, date of birth, email address and mailing address. A spouse who does not have a SSN can enter all zeros. The tax and financial questions in this section are identical to those in the Student Financial Information section.



# **Additional Questions**

In this section, students answer 4 Tuition Equity Questions. To be eligible for Oregon state grants and/or in-state tuition rates at Oregon public universities as a non-U.S. Citizen, the student must certify that they meet all of the following conditions. The student will need to respond to each of the following certification statements:

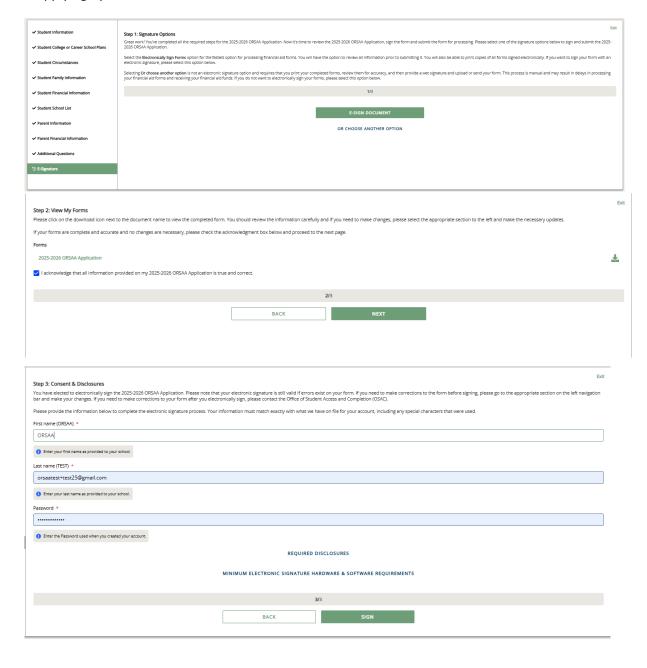
- I certify that during each of the three years immediately prior to receiving a high school diploma or leaving school before receiving a high school diploma, I attended an elementary or a secondary school in Oregon.
- I certify that during each of the five years immediately prior to receiving a high 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.
- I certify that I have received or will receive before the start of the next school year a high school diploma from a secondary school in Oregon, or the equivalent of a high school diploma.
- In addition to school attendance requirements, to be eligible 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. I certify that I intend to become a citizen or a lawful permanent resident of the
   United States.



### E-Signature

After answering all questions in the ORSAA, the student chooses how they want to provide their signature. They can electronically sign or choose another option. We highly recommend to electronically sign it as choosing the other options will take longer for their application to get reviewed and processed. The student selects "E-Sign Document", then the student must download a PDF version of their responses on the application by clicking the downward facing arrow icon. Once downloaded the student acknowledges all the information provided on their application is true and correct by clicking the box before the statement and then clicking the "Next" button.

Student then signs electronically by providing their first and last name, and password for the ORSAA account, then clicks the "Sign" button. The student will need to make sure their device meets all hardware and software requirements necessary for electronic signature. Currently Safari does not allow on this action on mobile devices. We recommend using Google Chrome or Microsoft Edge browsers if applying by mobile device.



# **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. If the student is dependent, a new status will appear in the application box: "Request Parent Signature." In the action box, the student should select the green box "Request parent signature" to invite a parent to sign the application.

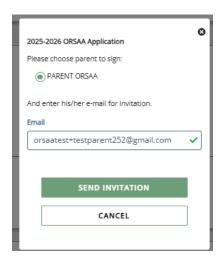


#### **Parent Process**

#### **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 "request parent signature" button, the student will see a screen that asks the student to choose a parent to sign the ORSAA. The student should make sure the parent email address is correct or enter a new email address for parent, 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. Once they select what parent will sign, student clicks on the "Send Invitation" button.



#### **Confirm Parent Selection**

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



#### **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 they received by email. 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.

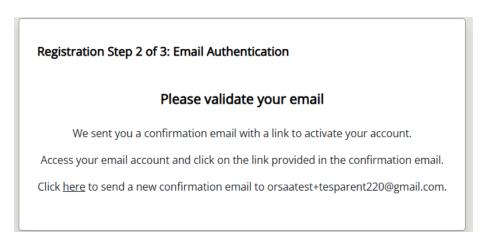
#### **Parent Account Creation**

This process is the same as a student account creation, however it will require the last 4 digits of their Social Security Number (or all zeros if they do not have an SSN). There are 3 steps in creating an account to access the ORSAA.

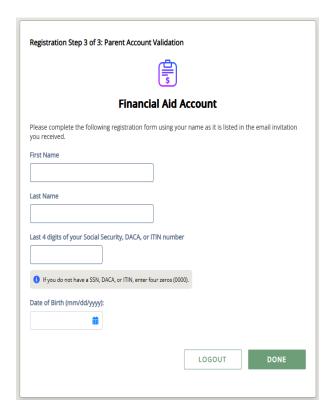
Step 1, parent provides their personal email and confirms it. A password will need to be created with the stated minimum requirements. The newly created password will need to get confirmed. Parent will then click on "I'm not a robot", in which the parent will get a number of pictures, or a "captcha." The parent must select the correct pictures it asks for to move forward, then selects "Continue" to complete step 1.



Step 2, parent must validate their email address through an email authentication process. They will receive an email notification from <a href="mailto:noreply@osacstudentxqa.regenteducation.net">noreply@osacstudentxqa.regenteducation.net</a>. The parent must follow the link that is provided in the email. The link will direct them back to the registration page, then the parent selects the "Continue" button. The sign in page will appear, the parent enters their email and password they used to create their account and will click on the "SIGN IN" button.

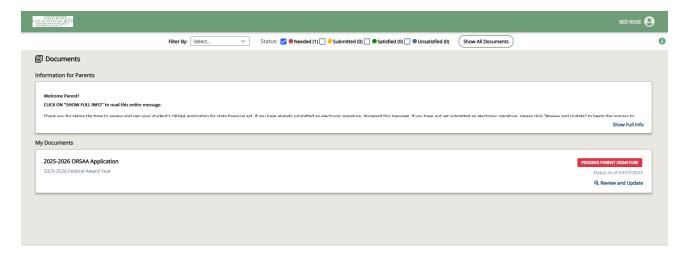


Step 3, parent provides first name, last 1 digits of SSN, DACA or ITIN number, if none please put four 0's, and date of birth and click the "Done" button.



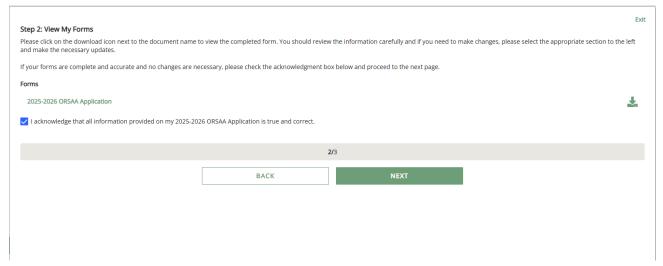
#### **Parent Landing Page**

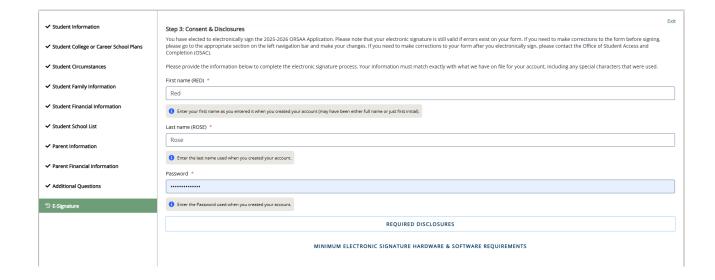
From the landing page, the parent will choose to review and sign the incomplete application. Parent must click on "Review and Update", then click "Sign Form" if no corrections are needed, otherwise they click on the "Start, Edit or Complete Form" button.



## **Parent Review & Electronic Signature**

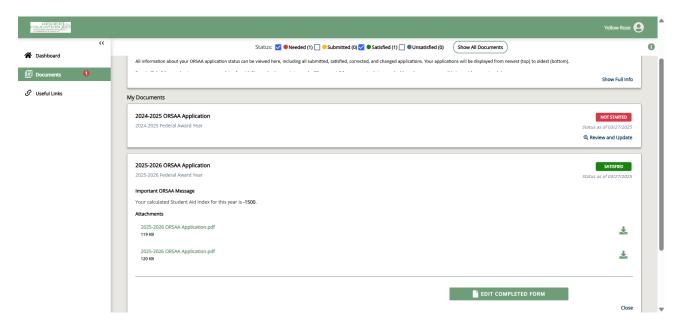
If parent choose to edit the form, before signing the ORSAA, the parent must navigate through each section of the ORSAA. They will have the opportunity to edit any information or review all sections and ultimately electronically sign the application. The final page is for the electronic signature. Parent will select the "E-SIGN DOCUMENT" button. Parent will have to click the download button and then selects the acknowledgement statement, then clicks the "NEXT" button. They must type in their first name, last name and click the "SIGN" button.





#### **Satisfied ORSAA**

After all signatures are complete, the student can sign in and check the landing page to ensure that their ORSAA for the correct academic year is in a "SATISFIED" status. This is the only place to confirm completion; a confirmation email will be sent to the student stating that their application was submitted successfully as well.



If the application is marked "SATISFIED", this means that the student (and parent, if a dependent student or spouse, if an independent married 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 email and password to complete the ORSAA again should they plan to attend. Just like the FAFSA, the ORSAA must be completed each year that the student is in school, in order to be considered for financial aid.

# **ORSAA Support**

Contact OSAC for support in English or Spanish:

(541) 687-7400, option 3

ORSAAHelp@hecc.oregon.gov

www.OregonStudentAid.gov

