Financial Documentation Worksheet Instructions

Read the instructions below carefully before completing the Financial Documentation Worksheet. If you have any questions about the worksheet or financial documentation policies, please contact an international student advisor at isfs.advisor@oregonstate.edu.

Before You Begin

Before you use the Financial Documentation Worksheet, you must determine the number of terms you must show support for. You must show documentation for academic and living expenses for one year (three academic terms and one vacation term) or the duration of your program, whichever is less. ISFS forms can be found at http://oregonstate.edu/international/atosu/students/forms.

1. Determine your estimated program completion date.
2. List each term between now and when you will complete your program, up to four terms.
3. Do not omit summer term – you must still show living and health insurance expenses when not enrolled.

Instructions

Personal/Program Information

1. Enter your First Name, Last Name, and OSU ID Number.
2. Select a Form Purpose.
3. Select your Degree Level.
4. Enter the number of dependents with you on a dependent visa in the United States. Enter 0 if you have no dependents.
5. Select the month/day that corresponds to the term when you intend to graduate.
6. Enter the last two digits of the year when you intend to graduate.

Calculating Academic and Living Expenses

1. Select a Term name (fall, winter, spring, summer).
2. Select your Enrollment status for that term.
3. Check GA if you will have a graduate assistantship that term.
4. Repeat steps 7-9 until you have entered all required terms.

Entering Funding

1. Graduate Assistantship
   • Enter the sum of all monthly stipend payments (generally nine months total).
   • Enter the sum of all lump sum (bonus) payments.
2. Scholarships
   • Enter any scholarships you have received and the award amount. If the scholarship name is not in the drop-down box, type in the name of your scholarship.
3. Personal/Other Funds
   • Enter personal or family funds and the amount of support.
   • Enter approved employment and the total amount of money you will earn (must be on-campus employment or approved through Curricular Practical Training, Optional Practical Training, or Academic Training).

Comparing Expenses and Funding

Compare the Total Expenses to the Total Funding. If the Difference is greater than 0, you must show additional financial funding. If the Difference is equal to or less than 0, you have shown sufficient financial funding.

Prepare copies of the supporting documentation with a checkmark next to the name and submit them with your request. Documentation must be unexpired and cover the current academic year.