

TUITION AND FINANCIAL AID

Residency Classification for Tuition Purposes

Effective January 1, 2020

Pennsylvania Classification

A student shall be classified as a Pennsylvania resident for tuition purposes if that student has a Pennsylvania domicile **and** that student's presence in Pennsylvania is not primarily for educational purposes. Domicile is a person's existing and intended fixed, permanent, and principal place of residence. A student whose presence in Pennsylvania is primarily for educational purposes shall be presumed to be a non-Pennsylvania resident for tuition purposes. Thus, most students who come to Pennsylvania for the primary purpose of attending the University will ordinarily continue to be classified as non-residents for purposes of tuition throughout their attendance at the University. The following are considerations that may be used by the University in determining whether a student is a Pennsylvania resident for tuition purposes:

1. An undergraduate student under the age of 24 is presumed to have the domicile of their parent(s) or legal guardian(s). An undergraduate student may rebut this presumption with clear and convincing evidence that they are financially emancipated from their parent(s) or legal guardian(s). If the parent(s) of an undergraduate student under the age of 24 are domiciled in Pennsylvania, the student is presumed to be domiciled in Pennsylvania.
2. A student who has continuously resided in Pennsylvania for purposes other than education for at least 12 consecutive months immediately preceding their initial enrollment at the University or an institution of higher education is presumed to have a Pennsylvania domicile for purposes of tuition. A student who has not continuously resided in Pennsylvania for at least 12 consecutive months immediately preceding their initial enrollment at the University or another institution of higher education is presumed not to be a resident of Pennsylvania for purposes of tuition but may rebut this presumption by clear and convincing evidence.
3. A United States government employee or member of the armed forces who was domiciled in Pennsylvania immediately preceding their entry into government service and who has continuously maintained Pennsylvania as their legal residence will be presumed to have a Pennsylvania domicile.
4. Military personnel and their dependents who are assigned to an active duty station in Pennsylvania and who reside in Pennsylvania shall be deemed Pennsylvania residents for purposes of tuition.
5. Veterans and their dependents may be eligible for in-state tuition regardless of residency status. The Office of Veterans Programs (<http://equity.psu.edu/veterans/>) should be contacted regarding eligibility.
6. Students who are not United States citizens, and have visas (excluding F and J) or lack visas, are presumed to be domiciled in Pennsylvania if they:
 - a. Undergraduate students: attended an accredited Pennsylvania high school for at least four years and thereafter (a) graduated from an accredited Pennsylvania high school or (b) received a Pennsylvania General Educational Development High School Equivalency Certificate (GED) and,
 - i. Meet items 1 and 2 above; or,
 - ii. Meet items 3, 4, or 5 above.
 - b. Graduate student: attended and earned a baccalaureate degree from a U.S. regionally accredited Pennsylvania institution and,
 - i. Meet items 2, 3, 4, or 5 above.
7. A student receiving a scholarship, guaranteed loan, grant, or other form of financial assistance dependent upon maintaining domicile in a state other than Pennsylvania is presumed not to be a Pennsylvania resident for tuition purposes.

Reclassification as Pennsylvania Resident

A student requesting reclassification as a Pennsylvania resident for tuition purposes must demonstrate by clear and convincing evidence that his/her domicile is in Pennsylvania, and that his/her presence in Pennsylvania is not primarily for educational purposes. Each request shall be decided individually on the basis of all facts submitted by the petitioner. Accordingly, it is not possible to list a specific combination of factors or set of circumstances which, if met, would ensure reclassification for tuition purposes.

Residency Reclassification Procedure

Review of Classification

A student may request a review of their residency classification by submitting a written request, including all necessary documentation to support classification as a Pennsylvania resident for purposes of tuition. Each case will be decided on the basis of an evaluation of all relevant facts and documentation submitted. Although not conclusive, the factors listed below may be given weight that the University may assign to them under the circumstances of each case. The University will consider the quality of evidence, rather than merely the quantity. A student is not required to establish a specific number of factors or a specific combination of factors for Pennsylvania domicile. Further, providing some or all of the documentation suggested or requested by the University will not necessarily result in being classified as a resident.

The following factors may be considered by the University in determining whether a student is domiciled in Pennsylvania:

1. Lease or purchase of a permanent, independent residence in Pennsylvania;
 - Note: A copy of the real estate listing or sales agreement to the previous domicile in the previous state of residence should also be sent, if applicable.
2. Payment of applicable state and local taxes and the filing of appropriate returns for such taxes;
 - Note: Returns should demonstrate an adequate level of income to support an independent domicile in the Commonwealth of PA.
3. Transfer of bank accounts, stock(s), automobile(s) and other registered property to Pennsylvania;
4. Pennsylvania driver's license;
5. Registration to vote in Pennsylvania;
6. Acceptance of an offer of permanent full-time employment in Pennsylvania, as well as evidence that job has been started, documented through the employer (generally applicable for adult students);
7. Continuous presence in Pennsylvania during significant periods while not enrolled as a student;
8. Membership in Pennsylvania social, athletic, civic, political and/or religious organizations which require residency as a membership requirement; and

9. For undergraduate students under age 24 claiming independence, evidence that the student is not a dependent. Such evidence may include copies of the tax returns of the student and/or his/her parent(s) or legal guardian(s) or sworn statements from the parent(s) or legal guardian(s) setting forth facts which establish the student's financial independence and separate residence.
10. If you (or your parent, if a dependent) are presently in the military and stationed in Pennsylvania, submit your Active Duty Military Orders. If you (or your parent, if a dependent), are stationed outside of Pennsylvania, but have maintained Pennsylvania residency, submit your current Leave and Earnings Statement (LES). If you (or your parent, if a dependent) have been discharged from the military, submit your DD-214.
11. Effective summer 2015, all eligible veterans regardless of benefit use, and military/veteran dependents actively using Chapter 33, Chapter 35 or Fry Scholarship benefits, will be eligible for in-state tuition regardless of residency. If you are a veteran and you are not using VA education benefits, please contact your campus Certifying Official to determine requirements to establish eligibility for the in-state rate.

Requests for review must be submitted by the student (requests from parents will not be considered) and no review will be entertained unless provided in writing.

Students requesting a review of their residency classification prior to the first day of the student's first semester at the University need to submit the written request to the following office:

• **Undergraduate Students:**

Undergraduate Admissions Office
 The Pennsylvania State University
 201 Shields Building
 University Park, PA 16802
ATTN: Residency Review Officer for Undergraduate Admissions

• **Graduate Students:**

Office of the Bursar
 The Pennsylvania State University
 103 Shields Building
 University Park, PA 16802
ATTN: Residency Review Officer for the Bursar's Office

Students requesting a review of their residency classification after the first day of the student's first semester at the University must submit the written request to:

• **Undergraduate and Graduate Students:**

Office of the Bursar
 The Pennsylvania State University
 103 Shields Building
 University Park, PA 16802
ATTN: Residency Review Officer for the Bursar's Office

The review will be conducted based on the documentation submitted by the student to support reclassification. All review of classification decisions will be made in writing addressed to the student. Students may only request a review of the initial classification if they believe it was wrongly determined, or if during the course of their enrollment, their circumstances change and the student can present information

demonstrating residency in Pennsylvania for purposes other than education.

Appeal of Classification

A student may challenge the review of classification decision by filing a written appeal to the University Appeals Committee on Residency Classification. Appeals must be submitted to the Committee within 30 days of the date of the written decision issued by the reviewing office. Contact information for the University Appeals Committee on Residency Classification will be included in the review of classification decision.

Appeals must set forth an explanation for why the student believes the reviewing officer's decision is incorrect and should include documentation supporting their claims. All materials relating to a student's appeal must be submitted at the time they submit the request for appeal. Materials submitted as part of the initial review will be provided to the Committee by the reviewing officer. Upon review of the appeal, if the Committee determines it needs additional information, the student will be notified.

While supporting letters from parents or guardians can be included in the appeal for the Committee's review, absent extraordinary circumstances, the student must be the individual to submit the request for appeal. The University will not entertain appeals submitted by a parent or legal guardian.

The student will be notified in writing of the Committee's decision and the Committee's decision is considered final.

Effective Date for Reclassification

It is each student's responsibility to request reviews and any related appeals in a timely manner. Any reclassification of a student's residency resulting from a student's request for review or appeal shall be effective as of the first day of the semester or session during which the request for review was received by the University or the first day of the following semester or session. The decision as to which semester or session becomes the effective date shall rest with the unit rendering the decision on reclassification.

Where it is deemed appropriate based upon the circumstances, the University, within its sole discretion, may reclassify a student's residency classification prior to the date in which the student submitted their request for review, but under no circumstances will reclassification occur more than one year prior to the semester in which the request for review was originally received.

TIME LIMIT: A request for review for reclassification will not be considered if submitted after the student has graduated from the University.

Notifications and Adjustments

1. The University reserves the right to require transcripts of tax filings from the Internal Revenue Service or Commonwealth of Pennsylvania rather than taxpayers' copies of those returns.
2. A student who changes his/her domicile from Pennsylvania to another state is required to give prompt written notice of this change to the Residency Review Officer in the Bursar's Office. The student shall be reclassified as of the date of such change. Students must also inform the Residency Review Officer in the Bursar's Office of any changes in the student's circumstances which might affect his/her residency status to determine whether reclassification of residency is necessary.
3. A dependent undergraduate student whose parent(s) or legal guardian(s) move outside of Pennsylvania may remain a

Pennsylvania resident for tuition purposes if he/she maintains a separate domicile within Pennsylvania and remains continuously enrolled at the University.

4. The University reserves the right to conduct audits regarding Pennsylvania resident classification and make any appropriate adjustments in the residency classifications of all students.

False Statements

Any student who provides false or misleading information or deliberately conceals or omits relevant facts in connection with a residency application or appeal will be subject to disciplinary action. In addition, such students will be subject to retroactive reclassification as a non-resident and will be responsible for the payment of non-resident tuition and fees for the period during which he/she was classified as a resident.

PLEASE NOTE: A page of frequently asked questions concerning residency classification for tuition purposes can be found at <https://www.bursar.psu.edu/faq> (<https://www.bursar.psu.edu/faq/>).