

2016-2017 ADDITIONAL EXPENSE APPEAL

Student UCM ID _____ Phone Number _____

Student Full Name _____
First Name _____ Last Name _____ M.I. _____

Current Address _____
Street Address _____ City _____ State _____ Zip Code _____

INSTRUCTIONS

Please use this form to request an increase to your 2016-2017 Cost of Attendance, i.e., total financial aid budget. In addition to this form **you are required to attach supporting documentation for each additional expense claimed (please read reverse side for required forms of documentation for each category)**. Our office reserves the right to exercise professional judgment to deny requests that are not considered direct educational expenses. We will notify you by e-mail of our decision.

Please complete the following steps:

1. Review average Student Expenses Budget at *financialaid.ucmerced.edu* under Cost of Attendance. Determine whether you have exceeded the budgeted allotment for any category during the academic year.
2. Create your own personal budget online through Cash Course: *budget.cashcourse.org*. Print out a copy of your budget which you will need to complete Step 3.
3. Complete Financial Awareness Counseling online at *studentloans.gov*. After completing online, print out a copy of your confirmation page to submit with your appeal.
4. Attach a written appeal stating the additional expenses you are documenting and why. Provide copies of all required documents and receipts.
5. Expenses must be incurred during the 2016-2017 actual dates (of academic year).

- I am submitting the following additional expenses for:
- Increased loan eligibility:
 Subsidized Loan
 Unsubsidized Loan
 Outside Agency Scholarship

I will accept up to _____ additional loan (specify amount or "maximum").

STUDENT EXPENSES

See list of allowable expenses and required documentation on the back of this form.

1. Housing: *(student's share only)*

Total Monthly Rent/Mortgage: *Attach a copy of the executed lease.* _____

Total Monthly Average Utilities: *Attach a copies of utility bills.* _____

Total Monthly Rent & Utilities: _____

2. Medical/Dental/Optical: *(Not covered by insurance.)* _____

3. Major car repairs or unusual required transportation expenses _____

4. Computer: *(Maximum request \$1,200. One time in undergraduate years).* _____

5. Disabled Student Allowance *(See documentation needed on the back of this form.)* _____

STUDENT CERTIFICATION

I hereby declare that all information reported on this document is true, complete, and accurate to the best of my knowledge. I understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal and/or repayment of financial aid and referral to the appropriate authorities.

Student Signature _____ Date _____

FINANCIAL AID AND
SCHOLARSHIPS**EXPENSE CATEGORIES**

* Receipts for expenses incurred during the 2016-2017 academic year must be submitted. *

Housing/Utilities

To be eligible for the increase, you must demonstrate that your total housing cost exceeds your annual housing budget. Allowable expenses are: rent, heat/electric, telephone, cable, water/sewer, and internet. These costs are not allowable: parking, security deposits.

Required documents:

- Copy of lease or rental agreement or letter from landlord with copies of 3 months of cancelled checks.
- Copies of 3 month's worth of utility bills specifying your portion (if claiming this expense).

Medical, Dental, and Optical Allowances

- Bills from the doctor and/or provider of services and documentation from insurance company of what will be covered by insurance (Explanation of Benefits statements and your remaining out of pocket costs after insurance pays).
- Receipts or bills for medication, optical, or dental expenses; the bill must indicate that the expense was not covered by insurance. Estimates will not be accepted.

Major Car Repairs or Unusual Required Transportation Expenses

- For major car repairs (beyond regular maintenance and normal wear and tear), attach dated paid receipt(s) that were paid by you. Only paid receipts will be considered, no estimates.
- Transportation costs required by an academic program, employment, or other reasons directly related to educational needs. Supporting statements from academic advisor or employer is required.
- If for other reasons, submit signed, written statement indicating how unusual required transportation expenses are directly related to educational needs.

Disabled Student Allowances

- An allowance may be made for academic expenses related to a student's disability including special services, personal assistance, equipment and supplies that are reasonably incurred and not provided for by any other agency. In addition, the cost of cognitive testing can be covered with documentation from disability services and the clinician performing the test.

Computer

- One time only in alternative loan or William D. Ford Direct Loan (**if the student has any remaining eligibility**). Must provide:
 - Invoice or documentation showing estimate of cost

Books and Supplies

- Demonstrate that your total cost for required books and supplies for the semester/year exceeds the standard budget by providing:
- Register tape receipts for all books and supplies required for each course
 - List of courses and the required books and supplies
 - For special equipment and supplies, all related receipts plus an explanation as to why you required these items