USF
School of Law
Office of Financial Aid

Office of Financial Aid
2130 Fulton Street | San Francisco, CA 94117
415.422.6210 | 415.422.5442 fax | lawfinaid@usfca.edu
www.usfca.edu/law/financialaid

2012-2013
BUDGET APPEAL REQUEST APPLICATION

ADDITIONAL EXPENSES DOCUMENTATION WORKSHEET

DEADLINE TO SUBMIT APRIL 1, 2013

Students can document certain additional expenses and request additional aid if the amounts already budgeted for your standard annual cost of living expenses are not sufficient to meet your needs. Eligible expenses must occur between **July, 1 and May 1 of the given academic year**. Complete the all required sections of this application including itemizing your expenses and submit to the Law School Office of Financial Aid, Kendrick Hall Rm-238. *Be sure to attach all required documentation. Budget appeal request will begin, September 1, of the given academic year.*

All requests for Budget appeal are reviewed on a case by case basis and are not guaranteed for approval.

Name: _____ Student ID: _____

Budget Increase Request Amount: _____

Please explain the reason(s) for your appeal. Include all pertinent facts including the total amount of your request. Incomplete appeals will be returned. Changes to your current award are contingent on the type of funding available, eligibility policies and regulations. Use a separate attachment if additional space is needed for the explanation.

_____

_____

_____

Additional financial aid eligibility created by this request will be funded first with Direct Unsubsidized Loan funds (if applicable), then Direct Graduate PLUS or Private Loans.

Your signature below acknowledges that you agree to accept additional Direct Unsubsidized or Graduate PLUS Loans if eligible for an approved increase.

_____ _____

Signature **Date**

OFFICE USE ONLY

- ☐ Appeal Approved Amount Increase Approved: _____Type of Increase: _____
- ☐ Appeal Denied
- ☐ Appeals Committee Approval

Comments:

_____

_____

Staff initials: _____ Date:_____

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EXAMPLES OF REQUESTS CONSIDERED:

Housing & Utilities: The student's name must be on the lease/rental agreement and on all utility bills. If the housing documentation indicates occupancy by more than one person, the total housing cost will be divided by the number indicated.

Housing & Utilities	Acceptable Documentation
Housing: $900 Monthly allowance budgeted for Off-Campus rent.	1. Copy of Lease Agreement, **AND** 2. Three months of cancelled checks, **OR** 3. Three months copies of current duplicate checks, **OR** 4. Three months copies of current bank statements 5. Itemized Expense Worksheet (Page 4 & 5)
Utilities : $150 Monthly allowance budgeted for Off-Campus utilities.	1. Copy of utility bill, **AND** 2. Three months of cancelled checks, **OR** 3. Three months copies of current duplicate checks, **OR** 4. Three months copies of current bank statements 5. Itemized Expense Worksheet (Page 4 & 5)

Transportation: If a student drives and is requesting an additional transportation allowance, the student must explain the necessity for using private rather than public transportation.

Transportation	Acceptable Documentation
Car Repair: **Unanticipated** car repairs can be considered if incurred during the academic period. Scheduled maintenance is budgeted into the personal expense budget allotment and is **not** considered for additional aid.	1. Three competitive estimates for services, **AND** 2. Copy of final bill, **AND** 3. Proof of bill payment 4. Itemized Expense Worksheet (Page 4 & 5)

Medical: Health insurance is not included in the Cost of Attendance Budget. Students can request additional aid to pay for school sponsored health insurance as well as reasonable medical expenses not covered by insurance. Students can also submit documents for projected academic year medical expenses. Students who opt to purchase insurance outside of the school sponsored insurance must explain the necessity for such insurance.

Medical	Acceptable Documentation
USF Student Medical Insurance:	1. Proof of payment from Aetna
Private Medical Insurance:	1. Copy of Medical Insurance Policy, **AND** 2. Explanation justifying this options, **AND** 3. Three months of cancelled checks, **OR** 4. Three months copies of current duplicate checks, **OR** 5. Three months copies of current bank statements 6. Itemized Expense Worksheet (Page 4 & 5)
Medical Expenses not covered by insurance:	1. Copy of insurance contract, **AND** 2. Copy of medical bill 3. Itemized Expense Worksheet (Page 4 & 5)
Projected Medical Expenses not covered by insurance:	1. Copy of insurance contract, **AND** 2. Signed health care provider's statement, written on letterhead, indicating treatment required, nature of treatment (emergency or routine), cost and schedule date of future treatments 3. Itemized Expense Worksheet (Page 4 & 5)

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Computer Purchase: The purchase of a new computer is considered a legitimate educational expense that is not factored into the standard Cost of Attendance Budget. This budget increase request is permitted as a ***onetime adjustment*** during a student's tenure at USF. Purchase of the computer cannot be any earlier than July 2 for the applicable academic year of the budget increase request.

Computer Purchase	Acceptable Documentation
Computer: $3,000 funding cap. Purchase can include computer, applicable software, protection plan, and a printer	1. Copy of Itemized receipt, including all hardware and software items included in the purchase price.

Child Care: Child care for dependents under the age of 14 is not included in the Cost of Attendance Budget. Students can request additional aid to cover this cost. Married students or students receiving child support for dependents are expected to share the cost of child care.

Child Care	Acceptable Documentation
Child Care: Limited to $1,000/month/child	1. Signed Child Care Administrator's statement, written on letterhead, indicating expected cost , dates, times of services, **AND** 2. Cancelled checks, **OR** 3. Receipts, **OR** 4. Bank Statements

THE FOLLOWING EXPENSES ARE <u>NOT</u> ALLOWABLE FOR ADDITIONAL FUNDING THROUGH THE FINANCIAL AID OFFICE:

1. Credit Card Payments
2. Educational Loan Payments
3. Personal Loan Payments
4. Car Loan Payments
5. Car Purchase
6. Scheduled Car Maintenance
7. Additional Allowances for food
8. Optional Medical, Dental, or Vision procedures or purchases

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ITEMIZED EXPENSES WORKSHEET:

Cost of Attendance Budget Itemized					
		2011-2012 Academic Year			
		Full Time		Part Time	
Tuition		$ 40,464.00		$ 1,510.00	per unit
SBA Fee		$ 70.00		$ 1.75	per unit
LRAP Fee		$ 10.00		$ 10.00	per year
Total Tuition Fees		**$ 40,544.00**		**$ 1511.75**	**per unit ($31,747 @ 21 units + $10 LRAP)**
LIVING EXPENSES					
Room and Board Details	**Budget Per Month**	**Annual Budget**		**Actual Per Month**	**Annual Actual (Actual Per Month * 9)**
Rent	$ 1,000.00	$ 9,000.00		-	-
Utilities	$ 150.00	$ 1,350.00			
Groceries/Food	$ 450.00	$ 4,050.00		-	-
Total	**$ 1,600.00**	**$ 14,400.00**			
Books Supplies Details	**Budget Per Semester**	**Annual Budget**		**Actual Per Semester**	**Annual Actual**
Books/Supplies	$ 750.00	$ 1,500.00			
Total	**$ 750.00**	**$ 1,500.00**			

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Transportation Details	Budget Per Month	Annual Budget		Actual Per Month	Annual Actual (Actual Per Month * 9)
Transportation	$ 128.89	$ 1,160.00			
Total	**$ 128.89**	**$ 1,160.00**			

Personal Expenses Details*	Budget Per Month	Annual Budget		Actual Per Month	Annual Actual (Actual Per Month * 9)
Unexpected Expense Funds	$ 206.11	$ 1,855.00			
Loan Origination Fees*		$ 1,990.00			
Discretionary Funds	$ 206.11	$ 1,855.00			
Total	**$ 412.22**	**$ 5,700.00**			

Total Living Expense Budget		$ 22,760.00			

*Loan Origination Fee amounts will vary. In this example Loan Origination Fees in the amount of $1,990 have been included in the Personal Expense Details. These fees are deducted from federal loans prior to disbursement to USF. This example reflects fees a student who received full Subsidized/Unsubsidized and PLUS Loans to cover their cost of attendance.