

COST OF ATTENDANCE ADJUSTMENT REQUEST

Cost of Attendance COA) Adjustment Requests must be submitted by the following dates to ensure review:

- **Fall only students-** November 18th, 2016
- **All others-** March 30th, 2017

Please note that Direct Loans are available only if accepted and the federal online requirements, including the Master Promissory Note, Entrance Counseling, and/or Parent PLUS Loan Application are completed by the following dates:

- **Fall Only** – Direct Subsidized/Unsubsidized Loan: November 30, 2016; Parent PLUS, October 30, 2016.
- **Fall/Spring or Spring only** – Direct Subsidized/Unsubsidized Loan; April 30, 2017; Parent PLUS, March 30, 2017.

Note: Loans may not disburse if any loan requirement is completed after these dates.

Printed Name: _____ Student ID# (required): _____

Email: _____ Phone: _____

STUDENT EXPENSES

INSTRUCTIONS: Enter the expenses you are requesting be added to your cost of attendance. Expenses must be incurred during the academic year (August 2016 – May 2017).

Documentation is required for all of the expenses you list below. **Please refer to page 2 to ensure that you provide the proper documentation.** Expenses that are not properly documented will not be considered. You are limited to one adjustment request per term.

- 1) Off –Campus Rent/Mortgage and Utilities
 Student’s share of Rent/Mortgage\$ _____/Month
 Student’s share of utilities (\$50 max)\$ _____/Month
- 2) On-Campus Apartment/Residence Hall Fee\$ _____/Academic Year
- 3) Transportation\$ _____/Academic Year
- 4) Computer Purchase\$ _____/Actual cost
- 5) Necessary Medical/Dental Expenses\$ _____/Academic Year
- 6) Childcare Expenses\$ _____/Month
- 7) Special Books and Supplies\$ _____/Actual cost
- 8) Relocating Expenses\$ _____/Actual cost

SIGNATURE: I acknowledge that Direct Loans, including PLUS, must be accepted through Cal Central and all requirements completed by the dates above to guarantee payment. Requests to convert loans to work-study may also be made through Cal Central. I understand that I may be asked to provide additional documentation and that submitting an appeal is no guarantee of approval. I certify that the information on this form is complete and accurate to the best of my knowledge.

Signature: _____ Date: _____

To expedite the processing of this form, fax it to our Financial Aid Forms Fax: 855-895-3690.

Mailing Address: University of California, Berkeley, Financial Aid and Scholarships Office, 2nd Floor Sproul Hall, Berkeley, CA 94720-1960;

In Person drop-off: Cal Student Central, 120 Sproul Hall.



EXPENSE ALLOWANCES TO STANDARD COST OF ATTENDANCE

| Type of Allowances | Amount already included in standard Cost of Attendance | Maximum allowed: Total allowed including the amount in the standard Cost of Attendance | Documentation Required |
|--|---|---|--|
| 1) Rent, Mortgage, Utilities (PG & E, Water, Telephone) Rent, Mortgage, Utilities for family housing | \$838/Month \$7,546/Academic year Off Campus | Family Housing - \$2,150/mo., \$19,350/academic year Not in Family Housing with Dependent Children: \$2,150/mo., \$19,350/academic year Off campus apartment: \$1,323/mo., \$11,910/academic year | Copy of a signed lease. If rent is not shared equally, you must provide documentation of your share (if married or living with a partner, rent will be split equally). |
| 2) On campus | \$14,992 Residence Halls \$12,050 On Campus Apartments | \$18,713 Residence Halls \$15,500 On Campus Apartment | Documentation, from the UCB Residential and Student Service Programs Office (e.g., copy of housing contract). |
| 3) Transportation Commuting and visits home during breaks (maximum of 2 per academic year, one per term) | Apartment (on/off campus) \$82/month – \$746/Academic yr. Living with relative: \$187/month - \$1,686/Academic year Residence Hall: \$272/semester - \$544/Academic year | Apartment - \$2,246 yr. (Commuting and trips home) Living with relative - \$2,586 yr. (Commuting only; no allowance for trips home) Residence Hall - \$2,044 yr. (\$600 for trips home and \$900 for commuting to/from work) | Commuting expenses: Itemization of per-month amount calculated at standard rates. If using private car, you must provide a copy of your DMV registration and a letter explaining why AC transit is not an option. Calculate \$.54/mile, cost of tolls and parking. Trips home: Copy of actual travel bill or quote/estimate for 21 day advance purchase fare. Two reasonably priced domestic or one international trip allowed per year. |
| 4) Cost of a Personal Computer Cost of CPU, monitor, required peripherals | -0- | Actual cost, up to \$2,500 You can only request an increase for a computer once every three academic years. | Receipt or order form for computer. Must be purchased during the period of enrollment. The date on the receipt or order form must fall within July 1, 2016 – May 30, 2017. |
| 5) Necessary Medical/Dental Not covered by insurance (e.g., checkups, lab work, prescription drugs, optical, dental, physical therapy, psychological counseling) | Residence Hall: \$276/ Academic Year Apartment: \$272/ Academic Year Living with relative: \$340/ Academic Year | Actual out of pocket costs, up to \$5,000. | Copy of billing statement or estimate, indicating cost, date, and type of treatment. The billing statement and/or estimate must indicate the amount paid by insurance. |
| 6) Childcare Expense For dependents under the age of 14. | -0- | Actual costs, up to \$10,800. | Single parent or married (if married, spouse must be a student or working). For licensed providers, two cancelled checks and a copy of the invoice or contract. For non-licensed providers, two cancelled checks and a signed letter from the provider. |
| 7) Special Books & Supplies Items needed in addition to regular required materials. Includes computer | \$1,262/ Academic Year (Includes \$95 for tablet purchase) | Actual cost | Itemized list approved by advisor (including travel). Items must be <i>required for all students</i> in the class. |
| 8) Relocating Expenses: <i>Applies only to new, entering students.</i> | -0- | Actual costs, up to \$2,000. | Receipts for actual rental truck expenses including gas receipts. Relocating expenses apply only to <i>new, entering students</i> and DO NOT include security deposits, the purchase of household items, flights, or other expenses related to securing living arrangements prior to the start of the term. |