COST OF ATTENDANCE ADJUSTMENT REQUEST - STUDENT PARENTS

Cost of Attendance (COA) adjustment requests must be submitted by the following dates: **Fall only students**: December 7, 2015; **All others**: April 29, 2016. Please note that Direct Loans are available only if the federal online requirements, including the Master Promissory Note, Entrance Counseling are completed by the following dates: **Fall only**: Direct Subsidized/Unsubsidized Loan - November 30, 2015; Grad PLUS - October 30, 2015. **Fall/Spring or Spring-only**: Direct Subsidized/Unsubsidized Loan – April 29, 2016 - Grad PLUS April 1, 2016

Print Name: __________________________ Student ID# (required): __________________________

Email: __________________________ Phone: __________________________

**STUDENT EXPENSES**

**INSTRUCTIONS**: Enter the expenses you wish to be added to your cost of attendance. Expenses must be incurred during the academic year (August 2015 - May 2016). 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 approved. You are limited to one adjustment request per term.

1) Rent/Mortgage and Utilities
   Student's share of Rent/Mortgage .............. $ _______________________/Month

2) Transportation ........................................ $ _______________________/Month

3) Computer Purchase ...................................... $ _______________________/ Academic Year

4) Necessary Medical/Dental Expenses .............. $ _______________________/Academic Year

5) Childcare Expenses .................................... $ _______________________/Month

6) Special Books and Supplies ....................... $ _______________________/Actual cost

7) Relocating Expenses .................................. $ _______________________/Actual cost

**Complete only after reviewing Total Income chart on page 3 of this form:**

8) Student/Dependent Food Expenses .............. $ _______________________/Month

   Please indicate if anyone in the household receives: ______ SNAP (Cal Fresh)

9) Personal Expenses (student/dependent) ........ $ _______________________/Semester

**SIGNATURE**

I acknowledge that Direct Loans must be accepted on MyFinAid.berkeley.edu two weeks prior to the end of the semester to guarantee payment. All increases to loans must be accepted by me via MyFinAid. Requests to convert loans to work-study must be also be made at MyFinAid.berkeley.edu. 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: 510-643-2015

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 (COA)

<table>
<thead>
<tr>
<th>Type of Allowances</th>
<th>Amount Included in Standard COA</th>
<th>Allowable Additional Expenses</th>
<th>Maximum COA: Standard amounts apply unless otherwise noted.</th>
<th>Documentation Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Rent, Mortgage, Utilities (#Z3) (PG &amp; E, Water, Telephone) Rent, Mortgage, Utilities for family housing #ZE</td>
<td>UG $798/month—$7,184/Academic Year</td>
<td>Actual expense above the standard COA allowance up to:</td>
<td>Family Housing - $2,109/mo., $18,981/academic year</td>
<td>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).</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Family Housing - $11,797 acad. yr. (includes maximum of $50 for utilities)</td>
<td>Not in Family Housing - $4,454 acad. yr.</td>
<td></td>
</tr>
<tr>
<td>2) Transportation (#Z6) Commuting and Visits Home During Breaks (maximum of 2 per academic year, one per term)</td>
<td>$81/month - $732/Academic Year</td>
<td>Off-Campus: $1,500 (commuting/trips home combined)</td>
<td>Off-Campus - $2,232 yr. standard COA</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Living w/Relatives: $900 (commuting only; no allowance for trips home).</td>
<td>Students who qualify under the chart on page 3 may provide documentation of expenses for dependent children for review.</td>
<td></td>
</tr>
<tr>
<td>3) Cost of a Personal Computer (#Z20 to #Z22). Cost of CPU, monitor, required peripherals</td>
<td>Not Included</td>
<td>You can only request a COA increase for a computer purchase once every three academic years.</td>
<td>$2,500</td>
<td>Receipt, order form, or estimate print-out for computer. Must be purchased during the period of enrollment. The date on the receipt or order form must fall within July 1, 2015 – May 30, 2016.</td>
</tr>
<tr>
<td>4) Necessary Medical/Dental not covered by insurance (#ZD) (e.g., checkups, lab work, prescription drugs, optical, dental, physical therapy, psychological counseling)</td>
<td>Off Campus: $29/month - $267 Academic Year</td>
<td>Actual expense above the standard COA allowance up to:</td>
<td>$5,000</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Off Campus: $4,733 Acad yr</td>
<td>Students who qualify under the chart on page 3 may provide documentation of expenses for dependent children under 18 years of age for review.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Living w/relative: $4,666 Acad yr</td>
<td>On Campus: $4,728 Acad yr</td>
<td></td>
</tr>
<tr>
<td>5) Childcare Expense (#Z8) For dependents under the age of 14.</td>
<td>-0-</td>
<td>Actual cost</td>
<td>$9,000</td>
<td>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.</td>
</tr>
<tr>
<td>6) Special Books &amp; Supplies (#Z8) Items needed in addition to regular required materials. Includes computer supplies.</td>
<td>$1,240 per Academic Year (Includes $93 for tablet purchase)</td>
<td>Actual cost above the standard COA allowance.</td>
<td>Actual cost</td>
<td>Itemized list approved by advisor (including travel). Items must be required for everyone in the class.</td>
</tr>
<tr>
<td>7) Relocating Expenses (Entering Year Only)</td>
<td>-0-</td>
<td>Actual cost up to a maximum of $2,000</td>
<td>$2,000</td>
<td>Receipts for actual rental truck expenses including gas receipts. Relocating expenses DO NOT include the purchase of household items, security deposits, flights, or other expenses related to securing living arrangements prior to the start of the term.</td>
</tr>
<tr>
<td>8) Food</td>
<td>$287/month- $2580/Academic Year</td>
<td>No additional allowance if total income outside of limits defined by chart on next page.</td>
<td>Students who qualify under the chart on page 3 may provide documentation of expenses for dependent children for review.</td>
<td>Receipts or shopping cart for two weeks groceries for self and dependent children under age 18.</td>
</tr>
<tr>
<td>9) Personal Expense (excludes medical expenses)</td>
<td>$208/month- $1871/Academic Year</td>
<td>No additional allowance if total income outside of limits defined by chart on next page.</td>
<td>Students who qualify under the chart on page 3 may provide documentation of expenses for dependent children for review.</td>
<td>Receipts or shopping cart for one semester for clothing and personal items for both you and dependent children under age 18.</td>
</tr>
</tbody>
</table>
EXPENSE ALLOWANCES TO STANDARD COST OF ATTENDANCE (COA)

Total Income Chart

INSTRUCTIONS:
1. Review the information you reported on your FAFSA for 2015-2016.
2. Add your Adjusted Gross Income (FAFSA/Cal Dream Application, question 36) to the Untaxed Income reported on your (FAFSA/Cal Dream Application, question 45a-j).
3. Review the chart below using the household size and number in college items on your FAFSA to determine if your Total Income is less than the allowed amount on the chart below.
4. If your Total Income falls below the amount allowed for your household size and number in college, you may complete items 7) and 8) on page 1.
5. If your Total Income is more than the amount on the chart for your household size and number in college, complete only items 1-7 on page 1.

Chart:

<table>
<thead>
<tr>
<th>Number in student’s household, including student (FAFSA/SAR #95)</th>
<th>Number of college students in household (FAFSA/SAR #96)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>$24,840</td>
<td>$20,590</td>
</tr>
<tr>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>$30,920</td>
<td>$26,700</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>$38,180</td>
<td>$22,450</td>
</tr>
<tr>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>$45,060</td>
<td>$29,720</td>
</tr>
<tr>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>$52,690</td>
<td>$25,470</td>
</tr>
</tbody>
</table>

Note: For each additional family member, add $5,950.
For each additional college student, subtract $4,230.

Examples to help you in reading the chart:
Oski and Ursa Bear are married and have 1 child. Oski is attending U.C. Berkeley and Ursa is attending Berkeley City College. Their total income is $21,000.00. Because their Total Income is less than $26,700.00 (Total Income allowed for 3 in the household with 2 in college), they are eligible for some expanded cost of attendance adjustment above the maximum.

Polar Bear and Grizzly Bear live together and are married. Polar is attending U.C. Berkeley and Grizzly is working and not attending school. They share custody of their three children. Polar does not work while attending school. Their tax return shows $55,000.00 in Adjusted Gross Income. Polar would be eligible for maximums allowed under items 1-7 but not 8-9.

Hints for successful completion of your appeal:
Be sure to document all items for a specific period of time, as noted on the appeal. Documentation can include copies of receipts or an online shopping cart. Refer to page 2 for guidance on acceptable documents. Keep in mind that food and personal expenses documented should be for yourself and your dependent child or children. Spouse expense cannot be considered. Receipts for items related to air travel or childcare should have the name of the person for whom the service is provided. If the document is a bill, make sure the name of the person being billed is on the document. Copy all smaller documents onto an 8 ½ X 11 sheet of paper.