

COST OF ATTENDANCE ADJUSTMENT REQUEST – STUDENT PARENTS

Cost of Attendance (COA) Adjustment Requests must be submitted by the following date:

- **Fall only students-** November 18, 2016; **all others-** March 30, 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 the Graduate PLUS requirements are completed by the following dates:

- **Fall Only** – Direct Subsidized/Unsubsidized Loan: November 30, 2016; Graduate PLUS: October 30, 2016
- **Fall/Spring or Spring only** – Direct Subsidized/Unsubsidized Loan: April 30, 2017; Graduate 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 wish to 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 the second page 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) Transportation\$ _____/Academic Year
- 3) Computer Purchase\$ _____/Actual cost
- 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 Cal Fresh: _____

- 9) Personal Expenses (student/dependent)..... \$ _____/Semester

SIGNATURE

I acknowledge that Direct Loans 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.



Type of Allowances	Amount already included in the standard Cost of Attendance	Maximum allowed: Total allowed <i>including</i> the amount in the standard Cost of Attendance.	Documentation Required
1) Rent, Mortgage, Utilities (PG & E, Water, Telephone)	Apartment (Off Campus): \$838/Month \$7,546/Academic year Apartment (On Campus): \$12,050/Academic year	On/Off Campus Apartment with Dependent Children, including UVA - \$2,150/mo., \$19,350/ 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) 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.	Apartment (On/Off campus) - \$2,246 yr. (Commuting and trips home)	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 for yourself and dependent children under the age of 18.
3) 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.
4) Necessary Medical/Dental Not covered by insurance (e.g., checkups, lab work, prescription drugs, optical, dental, physical therapy, psychological counseling)	Apartment (On/Off campus): \$272/ Academic Year	Actual out of pocket costs, up to \$5,000.	Copy of billing statement or estimate, indicating patient name, cost, date, and type of treatment. The billing statement and/or estimate must indicate the amount paid by insurance.
5) 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.
6) Special Books & Supplies Items needed in addition to regular required materials. Includes computer supplies.	\$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.
7) 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 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.
8) Food	\$291/month - \$2,624/Academic Year	Students who qualify under the chart on page 3 may provide documentation of expenses for dependent children for review.	Receipts or shopping cart for two weeks groceries for self and dependent children under age 18.
9) Personal Expense (excludes medical expenses)	\$212/month - \$1,910/Academic Year	Students who qualify under the chart on page 3 may provide documentation of expenses for dependent children for review.	Receipts or shopping cart for one semester for clothing and personal items for both you and dependent children under age 18.

Total Income Chart

EXPENSE ALLOWANCES TO STANDARD COST OF ATTENDANCE (COA)

INSTRUCTIONS:

1. Review the information you reported on your aid application for 2016-17.
2. Review the chart below using the household size and number in college items on your FAFSA or Cal Dream Application to determine if your Total Income is less than the allowed amount on the chart below.
3. If your Total Income (taxed and untaxed income) falls below the amount allowed for your household size and number in college, you may complete items 8) and 9) on page 1.
4. If your Total Income (taxed and untaxed 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:

Number in student's household, including student (FAFSA/SAR #95)	Number of college students in the household (FAFSA/SAR #96)				
	1	2	3	4	5
2	\$25,210	\$20,900	not applicable	not applicable	not applicable
3	\$31,390	\$27,100	\$22,790	not applicable	not applicable
4	\$38,760	\$34,460	\$30,170	\$25,850	not applicable
5	\$45,740	\$41,420	\$37,130	\$32,830	\$28,540
6	\$53,490	\$49,190	\$44,910	\$40,580	\$36,300

Note: For each additional family member, add \$6,040.
For each additional college student, subtract \$4,290.

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 \$27,100.00 (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.