



CALIFORNIA STATE UNIVERSITY  
**FULLERTON**

**Return to:** Office of Financial  
Aid P.O. Box 6804 GH-146  
Fullerton, CA 92834-6804

**Enter Student's  
CWID Here:**

**STUDENT BUDGET ADJUSTMENT APPEAL FORM for (2020-2021)**

PRINT CLEARLY AND USE BLACK INK

Read instructions on page 2 before completing

*Incomplete documents will not be returned. They will be disposed of in a secure manner, per university policy. This will delay processing.*

Last Name	First	Home Phone #	Cell or Message Phone #
-----------	-------	--------------	-------------------------

In some cases, the unusual expenses you incur during an academic year may be considered in determining the amount of your financial aid eligibility. The Office of Financial Aid will evaluate your expenses upon receipt of this form and related documentation.

**Documentation must be dated between August 22, 2020 and May 7, 2021 and identify who has incurred the expense.** If your financial aid award changes, you will be notified through TITAN-Online.

**Instructions:** Select an appropriate box below, attach documents, and include a **detailed** personal statement explaining why you are submitting a budget appeal.

TYPE OF BUDGET ADJUSTMENT REQUESTED:	
<input type="checkbox"/> <b>Medical, Dental, or Vision Care Expenses</b> <ul style="list-style-type: none"> <li>• Attach copy of billing statement (Identify only the amount <b>not covered</b> by insurance)</li> <li>• Medical expenses paid beginning August 22, 2020 through May 7, 2021 (attach copies of receipts of expenses not covered by insurance or estimates of unreimbursed expenses).</li> </ul>	\$ _____
<input type="checkbox"/> <b>Car Expense</b> <ul style="list-style-type: none"> <li>• Car repairs or estimate of repairs to be paid between August 22, 2020 and May 7, 2021 (attach copies of receipts or mechanic's estimates)</li> <li>• Excessive mileage (we will consider mileage greater than 80 miles per week)</li> </ul>	\$ _____ \$ _____
<input type="checkbox"/> <b>Child Care</b> <ul style="list-style-type: none"> <li>• Attach copy of bill which clearly identifies the child's name and amount paid</li> </ul>	\$ _____
<input type="checkbox"/> <b>Tuition Expenses – Elementary or Secondary School</b> <ul style="list-style-type: none"> <li>• Private school (Will be considered for special needs only); attach a copy of bill</li> </ul>	\$ _____
<input type="checkbox"/> <b>Books and Supplies (in excess of \$1029 per semester)</b> <ul style="list-style-type: none"> <li>• Attach copies of receipts</li> <li>• Attach verification that cost is required for course</li> </ul>	\$ _____

I certify that all information reported on all sections of this form and any attachments hereto are true, complete, and accurate. False statements or misrepresentations will be cause for denial, reduction, withdrawal and/or repayment of financial aid.

Is this your first Student Budget Adjustment Appeal form for 20/21? Y\_\_ N\_\_

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**FINANCIAL AID DECISION - OFFICE USE ONLY**

APPROVED     DENIED     NEED MORE INFORMATION     Comments     Scan & Mail     Scan Only

COMMENTS: \_\_\_\_\_

Staff Member's Initials: \_\_\_\_\_ Date: \_\_\_\_\_

## INSTRUCTIONS FOR REQUESTING A BUDGET ADJUSTMENT

### Who should request a budget adjustment?

If your “budget type” is not correct, you should complete this form to notify our office of your correct budget category (i.e., living with parents/relatives, on campus or off campus apartment/house).

You may also request a budget adjustment if you can document certain education-related expenses which are not included in the standard student budget. The standard budget includes basic expenses for registration fees, room and board, books and supplies, transportation and miscellaneous personal expenses. We will consider the addition of other expenses as they relate to your ability to attend school. For students living off-campus but not with their parents, the allowance must be based on reasonable expenses for the student’s room and board. Therefore, excessive rent or mortgage payments are “lifestyle choices” and will not be allowed as budget adjustments.

### How will a budget adjustment affect my financial aid package?

Eligibility for grants is based on your “expected family contribution” (EFC) which is, in turn, derived from an analysis of your/your family’s 2018 income and assets. Similarly, funding for the three “campus-based programs,” Federal Work Study, Federal Perkins Loan and Federal Supplemental Educational Opportunity Grant, is extremely limited. At CSUF, awards in these three programs are based on your EFC and other program-specific criteria. Therefore, a budget adjustment will not generally qualify for additional grants or any of the campus-based programs. **The primary purpose of requesting a budget adjustment is to increase your overall budget so that you will qualify for additional subsidized or unsubsidized Direct Loans.**

If you have already been approved for the maximum annual loan amount OR you are not interested in taking out a student loan, there is generally no benefit to be gained by submitting a budget adjustment appeal. Ask a Financial Aid representative if you’re unsure if you’ve borrowed the maximum from the loan programs.

### What if my parents have unusual expenses to be considered?

If you are a dependent student and your “expected family contribution” (EFC) is \$0 (zero), you already qualify for the maximum financial aid package. However, if your EFC is greater than \$0, we may be able to consider your parents’ unusual medical/ dental, dependent care (child care or elder care) or elementary and secondary tuition expenses in our evaluation of your family’s EFC.

**DO NOT COMPLETE THE BUDGET ADJUSTMENT APPEAL FORM TO DOCUMENT PARENTS’ OR SPOUSAL EXPENSES.** Instead, ask your parents or spouse to provide a written statement of the specific nature and amount of unusual expenses incurred during 2020-2021 academic year. *Documentation such as receipts, doctor and hospital bills, elementary and secondary school tuition charges, etc. must be attached to the itemized statement.* Submit the statement and documentation to the Office of Financial Aid, P.O. Box 6804, GH 146, Fullerton, CA 92834-6804.