



2018 - 2019 Cost of Attendance Adjustment Request

Instructions

Students may request an increase to their Financial Aid Cost of Attendance (COA) by submitting a formal appeal. If approved, the increase typically allows the student to borrow additional loan funds, subject to annual loan limits and/or credit approval (for PLUS or private loans).

Below are the allowable expenses for which the Financial Aid Cost of Attendance can be increased. Please review the instructions below, which include the documentation required for each item. Appeals without sufficient documentation cannot be processed. Please note that submission of an appeal does not guarantee approval.

Allowable Expenses and Required Documentation

Change to Housing Status (as reported on FAFSA or Dream Application)

- Your response to housing plans on the FAFSA or Dream Application determine your “Room & Board” expenses in your Financial Aid Cost of Attendance
- If there has been a change to your housing plans from what was initially reported and
 - you will now be living on campus – we will confirm with Student Financial Services
 - you will now be living off-campus – you must provide a copy of your lease or rental agreement
 - you will be living with your parent(s) or relatives – no documentation required

Student’s Portion of Rent

- Maximum allowable increase is \$1,200 per month
- \$1,104 per month is already included in the Financial Aid Cost of Attendance
- Rent can only be adjusted for months when you are enrolled in classes
 - Fall: August – December
 - Spring: January – May
 - Summer: Based on actual Summer Session enrollment
- You must provide documentation of your portion of the rent:
 - Copy of your lease or rental agreement, **or**
 - Copies of two most recent receipts or cancelled checks (made out to your landlord, rental company, or roommate whose name appears on the lease), **or**
 - If neither of the above is available, documentation as specified by a CSULB Financial Aid Counselor

Computer Purchase

- Maximum allowable increase is \$2,000
- Allowed once per academic program (Bachelor’s, Master’s, Doctoral, Credential)
- If cost exceeds \$2,000, you must provide documentation from your academic department that the equipment or software is required and that the costs are reasonable market value
- You must provide documentation of the computer expenses:
 - Purchase receipt **or** invoice

Additional Books and Supplies

- Maximum allowable increase is based on actual expenses
- \$1,100 per semester is already included in the Financial Aid Cost of Attendance
- You must provide documentation of your books and supply purchases:
 - Purchase receipt for all books and supplies (including the first \$930/semester already included in cost of attendance), **and**
 - Copies of course syllabus to confirm books and supplies were required for courses



Medical or Dental Expenses (Not covered or reimbursed by insurance)

- Expenses must be medically necessary
- You must provide a letter from your doctor or provider of services detailing treatment plan and costs
- You must provide the following documentation of expenses:
 - Copies of receipts or bills for medication, dental, expenses, optical expenses
 - Documentation of insurance coverage indicating what portion of expenses will not be covered by insurance. This is the amount you are responsible for out-of-pocket.

Dependent Care

- Expenses can only be considered for legal dependent(s) of the student
- Allowable expenses are for those that occur during times when the student is in class and/or participating in program-related activities
- You must provide the following documentation for dependent care expenses:
 - Signed copy of the contract or a statement from the provider verifying period of care
 - This statement must specify the period of care (dates); the times during which care occurs; **and** the costs

Disability – Related Expenses

- You must be registered with Disabled Student Services (DSS) at CSU Long Beach
- You must provide a letter from DSS documenting your disability and verifying the need for the expenses
- You must provide the following documentation of expenses:
 - Copies of receipts or billing statements, **or**
 - Copies of estimated expenses (from a website, supply catalog, etc.)

Special Projects Related to Program

- Expenses incurred for special projects must be reasonable and necessary in relation to your academic program
 - Examples include:
 - Thesis project
 - Research project or fieldwork
 - Internship
 - Academic Conference
- You must provide a letter from your advisor or professor. The letter must contain the following:
 - Itemized budget of the expenses related to the special project
 - Signed statement that the expenses are necessary and amounts provided are reasonable

Other Expenses (Not listed previously)

- You must provide an explanation detailing:
 - What each expense is
 - Why the expense is necessary for your academic program
 - Itemized amounts

Deadlines for Submitting Appeals

November 9, 2018:	FALL Only students
April 12, 2019:	SPRING Only Students
April 12, 2019:	Academic Year students (attending both Fall and Spring)

Keep these instructions for your records; only turn in the Cost of Attendance Adjustment Request



2019



FSABGT

CALIFORNIA STATE UNIVERSITY LONG BEACH

18-19 FSABGT

Name _____

Campus ID Number _____

2018 - 2019 Cost of Attendance Adjustment Request

The estimated Cost of Attendance (COA) that is used to determine your financial aid eligibility includes average amounts for standard educational expenses incurred by all students including tuition, mandatory fees, room, board, books, supplies, and transportation. Adjustments to the standard COA are made at the discretion of the Office of Financial Aid.

Change in Housing Status Only

Use this section to notify the Office of Financial Aid of a change in your Housing status. **Choose one option per semester.**

For Fall 2018, I will be living:

Off-Campus (attach a copy of your lease) On-Campus (Residence Halls) With Parent or Relatives

For Spring 2019, I will be living:

Off-Campus (attach a copy of your lease) On-Campus (Residence Halls) With Parent or Relatives

Change in California Residency Status

My residency status has changed. I would like my budget and financial aid revised to reflect my new status. I am now a:

California Resident (effective _____) Non-California Resident

Request for Additional Student Expenses

Enter the expenses you are requesting added to your 2018-2019 Cost of Attendance

Budget Adjustment Category	Student Cost
Student's portion of rent (indicate monthly amount)	\$
Computer Purchase (only allowed one time during academic program)	\$
Additional Books & Supplies (indicate total amount spent on books & supplies)	\$
Medical or Dental Expenses (Medically necessary; amount not covered / reimbursed by insurance)	\$
Dependent Care Expenses (indicate monthly amount)	\$
Disability-Related Expenses	\$
Special Projects Related to Program	\$
Other (Specify)	\$

The Office of Financial Aid will review your request within 2 weeks to determine if you have documented expenses that are reasonable and qualify according to federal regulations and University policy. The following criteria is used:

- Expenses are directly related to the student's education
- Expenses were incurred by the student during the period in which the student was enrolled in classes
- Expenses are documented (refer to instructions for required documentation)

Student Signature _____

Date _____

Return this form to our office

By Mail:

CSULB Financial Aid Office
1250 Bellflower Blvd.
Long Beach, CA 90840-0106

In Person:

Visit our website to "Join the Queue"
Beach Central – Intake Windows
Brotman Hall; 1st Floor Courtyard

By FAX:

(562) 985-1509

Attention: Financial Aid