



<b>Student Financial Services</b> Mellencamp Hall, Room 162, P.O. Box 469, Milwaukee, WI 53201-0469 Phone: (414) 229-4541 Fax: (414) 229-5699 Email: <a href="mailto:finances@uwm.edu">finances@uwm.edu</a>
---

## 2023-24 Request for Budget Adjustment Instructions

If you feel the amounts used in the cost of attendance (COA) listed on your financial aid offer do not reflect your current situation, you may be eligible to have your COA re-evaluated by submitting appropriate documentation. While increasing your COA does not change your eligibility for grants or scholarships, you may be eligible to borrow more through a Direct Loan or a Private or PLUS Loan.

Direct Annual Loan Limit	Dependent*	Independent*
Freshman	\$5,500	\$9,500
Sophomore	\$6,500	\$10,500
Junior/Senior	\$7,500	\$12,500
Graduate	N/A	\$20,500

\*Status determined by the FAFSA, not the student. Those close to the Aggregate Limits may receive less.

Most students already receive the maximum Direct Loan for the academic year based on their grade level. They also often have room in their COA to apply for additional loan funding needs without needing to complete this form. If you need to borrow additional loan funds and you aren't sure whether this form is needed, feel free to contact us first. The best way to contact us is via email, [finances@uwm.edu](mailto:finances@uwm.edu). Tell us how much you need to borrow, the type of loan you are hoping to apply for, and we will let you know if we need this form. The other loan options are Private Alternative Loans, Parent PLUS, and Grad PLUS Loans and they all require a credit check.

**Please Note:**

- Forms will be returned, and processing may be delayed, if forms are incomplete or all required documents aren't submitted at the same time.
- The expenses must be yours, but could be purchased by a parent (if you are dependent) or a spouse.
- The date of service or purchase must occur during the 2023-24 academic year. For those enrolled during the fall 2023 and spring 2024 terms the dates are September 2023 - May 2024. For those enrolled in the summer 2024 term, the dates are May 2024 - August 2024. Computer purchases may occur three months prior to the start of the 2023-24 academic year.
- Submit all budget adjustment requests for fall and spring terms at one time as multiple requests will not be honored. Summer term requests should be submitted separately between April 2024 and May 2024.
- Submit the form and appropriate documentation as soon as possible as processing times vary and can take between 3-6 weeks depending upon the time of the year. The documents should be submitted no later than the dates indicated below for each term:

Fall 2023 – November 20, 2023	Spring 2024 – April 15, 2024	Summer 2024 – June 3, 2024
-------------------------------	------------------------------	----------------------------

- There is no guarantee that forms submitted after the dates indicated above will be reviewed prior to the end of the term.
- If you have questions about the process, please contact us to discuss your situation with a staff member.
- Once review of your documents has been completed, we will send an email to your UWM account with the results and any additional required steps.

If you have any questions, please go to [uwm.edu/meetfinaid](http://uwm.edu/meetfinaid) to make an appointment to speak with a member of our Advising Staff.

# 2023-24 Request for Budget Adjustment

## Section 1 – Student Information (Please print clearly)

---

STUDENT NAME:	STUDENT ID #:
---------------	---------------

## Section 2 – Indicate Reason(s) for Budget Adjustment Request

---

\_\_\_\_\_ **A. Personal computer**

The maximum amount that a student's cost of attendance will be increased is equal to the actual cost of the computer hardware and software, or \$2,000, whichever is less and will only be increased once per degree for a computer purchase. **Documentation required:** Proof of purchase or a personalized estimate (store ads are not acceptable). The signed and dated personalized estimate must include the type of hardware/software to be purchased, the cost, the vendor from whom you will be making the purchase, and the estimated date of purchase.

\_\_\_\_\_ **B. Disability**

An allowance for expenses related to a student's disability may be included in the cost of attendance. These expenses include special services, personal assistance, transportation, equipment, and supplies that are reasonably incurred and not provided by other agencies. **Documentation required:** Proof of payment (such as official receipts) for at least two months. Please total amounts.

\_\_\_\_\_ **C. Transportation, Books/Supplies, and Housing**

Please complete worksheet on the next page to document your additional expenses.

**Suggested Documentation:**

- **Books/Supplies:** receipts showing the actual costs for at least one term
- **Housing:** signed lease detailing your cost and time frame
- **Transportation:** documentation detailing miles driven to and from class and how many times per week; include a Google Maps printout or similar document

Please total amounts if providing such documentation. Complete Section 5 on page 4 as well.

\_\_\_\_\_ **D. Child Care**

For a student with dependent(s), an allowance for costs expected to be incurred for dependent care may be included in your cost of attendance. This covers care during periods that include, but are not limited to, class time, study time, field work, internships, and commuting time for the student. If approved, the amount of the allowance will be based on the number and age of such dependents and will not exceed reasonable costs in the community for the kind of care provided. Note that the expense will be divided equally if married and your spouse is also attending college.

**Documentation required:** Proof of payment (documentation showing payment to the child care provider or a contract showing future commitment). Complete Section 4 - Child Care section on page 4. If this information changes at any time after submission, you must notify us.

## Section 3 – Student Statement of Certification

---

I certify that the information provided on this form is accurate. I understand that all financial aid funds are to be used for my cost of education, as any other use is considered fraudulent and prohibited by law.

**Student Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**NOTE: Signature cannot be typed or stamped. Must be signature.**

To avoid processing delays, return this form with all supporting documentation at the same time. Include your student ID# on all documents submitted.

## **Child Care Worksheet (Must be completed if you checked letter D in Section 2)**

This section is to be completed by the **Child Care Provider**:

Name of Child Care Facility or Individual:		
Address:		
City:	State:	Zip Code:
Phone number:		
Supervisor (if applicable):		

Identify the children that are enrolled in this Child Care Facility:

<b>Name</b>	<b>Age</b>	<b>Dates of Expected Child Care Enrollment</b>	<b>Number of Hours per week of Child Care</b>	<b>Rate per hour</b>	<b>Total cost per week</b>
		_____ to _____			
		_____ to _____			
		_____ to _____			
		_____ to _____			
		_____ to _____			
Total Cost for Child Care				\$	

Is this parent receiving W2, State of Wisconsin, or any other assistance/reimbursement for Child Care Expenses?  Yes  No

Are you, the care provider, receiving W2, State of Wisconsin, or any other assistance/reimbursement for this person's Child Care Expenses?  Yes  No

If yes, please provide the name of the source: \_\_\_\_\_

What is the **amount** and **frequency** of the childcare assistance/reimbursement? \_\_\_\_\_

**I certify that the above information is true and accurate to the best of my knowledge.**

<b>Signature of Child Care Provider</b>	<b>Date</b>

## **Additional Expenses Worksheet (Must be completed if you checked letter C in Section 2)**

Please complete the following chart documenting that your expenses for the 2023-24 academic year exceed the amount allocated in your budget for each category. The original budget for each category is listed; generally, the maximum any one category will be increased is by 20% of the original budget. For each category in which you are requesting a budget adjustment, please provide all appropriate supporting documentation.

\*Please indicate the semester(s) for which this budget adjustment is being considered:

- Fall 2023    
  Spring 2024    
  Summer 2024

<b>Common Budget Categories for Adjustment</b>	<b>Original Budget (per semester)</b>	<b>Your reported amount per <u>month</u></b>	<b>Your reported amount per <u>semester</u> (4 months)</b>
<b>Books/Supplies</b> <i>Suggested documentation:</i> <ul style="list-style-type: none"> <li>• Receipts or quotes showing actual costs of books/supplies</li> <li>• Syllabus indicating supplies needed</li> </ul>	\$400	\$/month	\$/semester
<b>Housing</b> (if not living with parent or on campus) <b>(Include only your portion)</b> <i>Suggested documentation:</i> <ul style="list-style-type: none"> <li>• Signed lease detailing cost and timeframe</li> <li>• Statement from housing provider with rent amount</li> </ul>	Undergraduate \$3353  Graduate \$4918	\$/month	\$/semester
<b>Transportation</b> <i>Suggested documentation:</i> <ul style="list-style-type: none"> <li>• Google Maps or other printout showing miles traveled</li> </ul>	\$800	\$/month	\$/semester

### **Other Expenses**

Please use the space below to explain any expenses that may be unique to your circumstance and provide appropriate supporting documentation.

---



---



---



---



---