



SUMMER 2018 BUDGET ADJUSTMENT REQUEST

(FOR INCREASES IN MANDATORY OR NON-DISCRETIONARY STUDENT EXPENSES)

The University of Kansas
Financial Aid & Scholarships
affordability.ku.edu

KU Visitor Center
1502 Iowa St.
Lawrence, KS 66045

Phone: 785-864-4700
Fax: 785-864-5469
E-mail: financialaid@ku.edu

When students and/or their families experience a change in circumstances such as an increase in mandatory or non-discretionary expenses, the information in the cost of attendance which is established by Financial Aid and Scholarships (FAS) may no longer accurately reflect the student's actual costs. In some cases, FAS may be able to adjust the cost of attendance budget based on these "special circumstances." **Adjustments to Cost of Attendance (COA) budget, however do not guarantee additional financial aid will be awarded.**

Student First Name	Last Name	MI	KUID Number
Phone Number	Email Address		

Please note: Students enrolled in hours exceeding the standard budgets (6 for undergraduate and 6 for graduate) need only submit a signed statement to request a review of the COA for additional tuition expenses.

If you have increases based on one or more of the following types of mandatory or non-discretionary expenses, adjustment of your academic year COA may be possible. Please be sure to send copies of required documentation with this request, as the documents will not be returned. Also, be aware that your documented paid costs must exceed the amount already accounted for in that particular category in your COA (affordability.ku.edu/costs). **Please attach the documentation listed below for the appropriate category. Note: Should you have additional circumstances you believe may qualify as an increase in mandatory or non-discretionary student expenses that are not listed below, please contact FAS. Criteria mentioned below are the most common only.**

Required Documentation (All Categories)

- Provide a signed narrative detailing the circumstances leading to the request for re-evaluation. Please be very specific in your narrative (i.e., provide dates and clearly identify the person or persons to whom the narrative refers) so that we can be specific with our request for any follow-up documentation.

Additional Required Documentation

Medical/Dental/Disability Expenses for the Student

- Documentation of student paid expenses during the summer 2018 term (June 1 – July 15) (e.g. canceled checks, receipts, paid medical office statements and/or paid bills) for the student. If formal payment plan(s) have been made, submit copy of signed agreement.

Additional Required Educational Expenses

- Letter from advisor/professor stating that expenses are required of all students in your program
- Copies of paid bills and/or receipts

Additional Transportation Expenses

- Copies of paid bills and/or receipts for repair bills
- Statement to confirm address from which you will be commuting

Excess Housing Costs and/or Food and Shelter for Dependents

- Signed copy of your 2015 federal tax return if student did not use the IRS Data Retrieval Tool
- Copy of Lease/Mortgage where student and family will reside between June 1, 2018 and July 15, 2018
- Copy of the most recent electric, gas and water bill from the address listed on the lease or mortgage

**DEADLINE TO SUBMIT REQUEST AND ALL SUPPORTING DOCUMENTATION FOR A
SPECIAL CIRCUMSTANCE RE-EVALUATION**

(FOR INCREASES IN NON-DISCRETIONARY STUDENT EXPENSES FOR THE SUMMER 2018 TERM):

JULY 15, 2018

Submit completed requests to the following address:

**Financial Aid & Scholarships
KU Visitor Center
1502 Iowa St.
Lawrence, KS 66045
Fax: 785-864-5469**

Your Special Circumstances Re-Evaluation request will be evaluated only after the original FAFSA and all supporting documents have been reviewed. It may take four to six weeks for us to evaluate your request. If your Special Circumstances Re-Evaluation results in increased eligibility for aid and funds are available, you may receive additional assistance. If the documentation you submit to FAS results in reduced eligibility for financial aid, however, **you may be required to repay aid and/or previously awarded aid may be canceled or reduced.** Please be aware that some grant funds are limited and may not be available when your Special Circumstance Re-Evaluation is completed. In addition, Federal Direct loans are limited based on federal regulation. However, additional aid options may come in the form of a Parent PLUS loan (undergraduate dependent students only), a Graduate PLUS loan (graduate students only), or a private/alternative loan such as the KU Endowment Association loan. See affordability.ku.edu/financialaid/loans for more information about loan options.

ANNUAL LIMITS FOR FEDERAL DIRECT LOANS

Dependent Undergraduates	Subsidized	Subsidized + Unsubsidized
0-29 Credit Hours	\$3,500	\$5,500
30-59 Credit Hours	\$4,500	\$6,500
60+ Credit Hours	\$5,500	\$7,500

Independent Undergraduates	Subsidized	Subsidized + Unsubsidized
0-29 Credit Hours	\$3,500	\$9,500
30-59 Credit Hours	\$4,500	\$10,500
60+ Credit Hours	\$5,500	\$12,500
Graduate/Professional/Law Students		\$20,500

**WE ENCOURAGE YOU TO SCHEDULE AN APPOINTMENT WITH A FAS STAFF MEMBER IF YOU
HAVE ANY QUESTIONS.**

I affirm that all of the information on this form is true and complete to the best of my knowledge. If asked by an authorized official to document actual expenses, I agree to provide proof of all information on this form.

I am aware that any request for supporting documentation will be sent to the email address listed above.

Student Signature (required)

Date