

## Summer 2023 Budget Appeal

### A. Student Information

Name:

NAU ID:

Phone:

NAU E-mail:

### B. Processing Information

The Budget/Cost of Attendance (COA) consists of direct and indirect costs related to your education expenses, including tuition, mandatory fees, room and board, books and supplies, and transportation. The assigned budget for summer is three months.

If you have incurred expenses above your budget for the summer you may file an appeal. **For your current Budget/COA budget, please refer to your LOUIE account before submitting the appeal to ensure your costs are above what is allotted.**

- Budget appeals are evaluated on a case-by-case basis and approvals are not guaranteed.
- Typically, budget appeals result in an increase of loan eligibility. If offered a Federal PLUS or private/alternative loan, it is the student's and/or parent's responsibility to apply for and be approved for the loan.
- Please allow up to 25 business days for processing.
- The deadline for the summer 2023 appeal is **July 31, 2023**.
- Items that **will not** be considered for a budget appeal include, but not limited to:
  - Credit card debt
  - Car payments
  - Car insurance
  - Routine car maintenance
  - Cell phone purchase or bills
  - Health insurance (unless required for your program)
  - Grocery bills (food allowance is include in the budget)

### C. Required Documentation

The following documentation is required for a budget appeal:

- This completed and signed form.
- A personal statement explaining your new expenses, including how they pertain to your education and when they incurred.
- Supporting documentation of your incurred and paid expenses, including paid receipts, etc. **All receipts and accompanied documentation must be in the student's name.**
- Any applicable [affidavit forms](#)

***Appeals may be denied due to a lack of sufficient documentation.***

<b>D. Appeal Circumstance(s) (Check all that apply.)</b>	
<b>Appeal Circumstances and Supporting Documentation</b>	<b>\$ per Term</b>
<input type="checkbox"/> <b>Computer Expense</b> <ul style="list-style-type: none"> <li>• \$3,000 limit per college career (Graduate or Undergraduate)</li> <li>• Provide a dated receipt/proof of purchase indicating when the purchase was made.</li> </ul>	
<input type="checkbox"/> <b>Transportation Expenses</b> <ul style="list-style-type: none"> <li>• <b>Major vehicle repair (new transmission, engine repair, etc.):</b> Provide an itemized list of all expenses incurred and copies of paid receipt(s) in the student's name. Routine maintenance items are not considered a major vehicle repair.</li> <li>• <b>Commuting:</b> Provide documentation (such as Google Maps) and directions of the route driven to and from school for educational purposes. Appeals for mileage will be approved in cases where the mileage expenditure (based on \$.625 per mile, the number of days per week, and the number of weeks during the semester that the commute is made) exceeds the student's original COA allocation for transportation expenses.</li> </ul>	
<input type="checkbox"/> <b>Program Expenses</b> <ul style="list-style-type: none"> <li>• <b>Travel for educational purposes:</b> Provide a signed statement from a professor/department explaining the required travel for educational purposes. Documentation of specific mileage is required (MapQuest, Google Maps).</li> <li>• <b>Short-term housing for program requirements:</b> Provide a statement from professor/department head that includes the required timeframe for housing to complete the program requirements (e.g., clinical rotations).</li> <li>• <b>Additional equipment required for your program</b> (e.g., stethoscope, scrubs, dental it, musical instruments).</li> </ul>	
<input type="checkbox"/> <b>Housing &amp; Utilities Expenses</b> <ul style="list-style-type: none"> <li>• Only rent or mortgage payments for the student's primary home will be considered. Moving expenses are not included.</li> <li>• Report your share of the rent or mortgage <b>only</b>.</li> <li>• Provide a signed copy of a current lease or mortgage statement verifying monthly housing expenses.</li> <li>• Provide a recent paid utility bill.</li> </ul>	
<input type="checkbox"/> <b>Dependent care</b> <ul style="list-style-type: none"> <li>• Provide a statement that includes: <ul style="list-style-type: none"> <li>○ Who the dependent is and their relation to the household?</li> <li>○ The period(s) for which dependent care is required.</li> <li>○ Documentation that outlines the costs associated.</li> </ul> </li> </ul>	
<b>E. Agreement and Understanding</b>	
<p><b>By signing below, I acknowledged that I have read and understood all the information outlined in this form. All of the information I am providing is true and accurate.</b></p>	
<p><b>Student signature:</b> _____ <b>Date:</b> _____</p>	