



EDUCATIONAL EXPENSES WORKSHEET 2020–2021

The Educational Expenses Worksheet is a form that you can complete if you wish to request an adjustment to your financial aid budget because your educational expenses are higher than the standard allowances (see standard allowance amounts at finaid.umich.edu/cost). If, after reviewing your worksheet, our office decides that an increase in aid is appropriate to cover your expenses, you will be given an increase in **educational loans**. Because loans must be repaid (with interest) when you graduate or withdraw from school, we encourage you to consider working or modifying your budget, if possible, rather than increasing your educational borrowing.

Student's name: Last

First

M.I.

U-M ID number (eight digits)

Email address

Please note: Costs must be incurred during the enrollment period.

Expenses listed may be for the student ONLY (not for your spouse/children) unless otherwise noted.

→ Would you like the Office of Financial Aid to increase your federal student loans based on this review? Yes No

Please note: If your loans are already at maximum levels it is your responsibility to seek out other assistance options such as supplemental borrowing through private or Federal PLUS loans.

Expense Category	Standard Amount Allowed Per Month or Per Term	Your Amount	Comments
PROGRAM-RELATED EXPENSES			
Special Program-related Supplies	None		Note: The allowance for standard books and supplies is \$524 per term for an undergraduate student and \$596 per term for a graduate student. Only include costs here that exceed those standard amounts and are for unique supplies necessary for your program. Include documentation of their program-related necessity.
Computer	None		Documentation needed: Copy of invoice or receipt Note: Only allowed once during your educational career
Class-related travel: (document/list mileage amount)	None		Documentation needed: Document/list mileage amount, insurance bills, etc. Must include written statement from department that travel is a required expense.
Other:	None		
Other:	None		
HOUSING/FOOD NOTE: ALL BILLS MUST BE IN STUDENT'S NAME OR PROVIDE EXPLANATION OF WHY THEY ARE NOT IN THE STUDENT'S NAME			
Rent & Utilities (Including cable and internet)	• Undergraduates - \$915/month • Graduate students - \$1,312/month (see note at right)		Documentation needed: Copy of lease and utility bills are required to adjust for utilities if in excess of standard
Telephone – current bills (cell only or land-line only)	• Undergraduates - \$50/month • Graduate Students - \$50/month		Documentation needed: Copy of bill required if in excess of standard.
Food/meals for special dietary needs	None		Documentation needed: receipts or documentation of costs and explanation of need.

Expense Category	Standard Amount Allowed Per Month or Per Term	Your Amount	Comments
EMERGENCY TRAVEL			
Travel to and from Ann Arbor for emergency needs. Note: Use Travel Expense form for standard travel expenses home	None		Documentation needed: Copy of invoice or receipts for requested travel. If driving and requesting mileage, include documentation of miles.
Other:	None		
HEALTH/MEDICAL COSTS			
Health insurance for student			Documentation needed: Copy of premium costs. Note: Graduate students are already budgeted for university health insurance plan.
Doctor and/or dentist bills			
Prescriptions			
Other (not tuition insurance):			
CHILD CARE			
Child care costs for: _____ (number and ages of children)			Documentation needed: Report expenses here that you are not seeking Child Care Subsidy to cover.
OTHER EXPENSES NOT LISTED ABOVE			
Include a separate letter with documentation.			

.....

Note: Evaluation of financial aid applications, re-evaluation of an aid package, or an appeal of a financial aid decision are handled through a review process using professional judgment by financial aid professionals in the U-M Office of Financial Aid. Any request to our office is considered using best professional practices and making such a request does not guarantee approval. Financial aid regulations are subject to change through legislation or policy changes by the U.S. Department of Education.