



EDUCATIONAL EXPENSES WORKSHEET 2023–2024

Fall-only submissions must be received by **Dec. 1**

Fall/winter and winter-only submissions must be received by **April 1**

The Educational Expenses Worksheet is a form 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)

→ **Check the time period for which this worksheet applies:**

Fall/winter terms (eight months)

Fall term only (four months)

Winter term only (four months)

- Spring/summer requests are not typically considered. If you have special needs over spring/summer, please speak with the Office of Financial Aid directly.

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.
- If you would like to increase a PLUS loan based on this budget adjustment, please talk with a financial aid advisor.

PROGRAM-RELATED EXPENSES

Expense Category	Standard Amount Allowed Per Month or Per Term	Your Amount	Comments
Program-related supplies (books, course materials, supplies & equipment)	<ul style="list-style-type: none"> • Undergrad: \$563 per term • Grad: \$640 per term 		Documentation needed: Copy of invoices or receipts.
Computer	No standard		Documentation needed: Copy of invoices or receipts. Note: Only allowed once during your educational career.
Class-related travel (document/list mileage amount) Note: \$200/term in travel is already estimated for all students. Only include costs if they exceed this amount.	No standard		Documentation needed: Document/list mileage amount, etc. Must include written statement from department that travel is a required expense.
Other:			
Other:			

HOUSING/FOOD

Note: All bills must be in student's name or provide explanation of why they are not in the student's name. Different allowances are made if you live at home with your parents. Speak directly with the Office of Financial Aid if this applies to you.

Expense Category	Standard Amount Already Allowed Per Month or Per Term	Your Amount	Comments
Rent & utilities (including cable and internet)	<ul style="list-style-type: none"> Undergraduates: \$1,078/month Graduate students: \$1,608/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 landline only)	<ul style="list-style-type: none"> Undergraduates: \$50/month Graduate Students: \$50/month 		Documentation needed: Copy of bill required if in excess of standard.
Food/meals for special dietary needs	Undergraduates: \$730/month Graduates: \$730/month		Documentation needed: Receipts or documentation of costs and explanation of need.

EMERGENCY TRAVEL

Expense Category	Standard Amount Already Allowed Per Month or Per Term	Your Amount	Comments
Travel to and from Ann Arbor for emergency needs . Note: \$200/term in travel is already estimated for all students. Only include costs if they exceed this amount.	\$200/term	Car Plane/train	Documentation needed: Copy of invoice or receipts for requested travel. If driving and requesting mileage, include documentation mapping the route and specifying the mileage (e.g., Google Maps).
Other:	No standard		

HEALTH/MEDICAL COSTS

Expense Category	Standard Amount Already Allowed Per Month or Per Term	Your Amount	Comments
Health insurance for student	No standard Note: Graduate students are already budgeted for university health insurance plan.		Documentation needed: Copy of premium costs.
Doctor and/or dentist bills	No standard		Documentation needed: Copy of invoice or receipts. Expenses must be incurred during the academic year.
Prescriptions	No standard		Documentation needed: Copy of invoice or receipts. Expenses must be incurred during the academic year.
Other (not tuition insurance):	No standard		

DEPENDENT CARE

Expense Category	Standard Amount Allowed Per Month or Per Term	Your Amount	Comments
Child care costs for: _____ (number and ages of children)	No standard		Documentation needed: Indicate only child care expenses not already reported through a Child Care Subsidy application.
Other (dependent care):	No standard		

OTHER EXPENSES NOT LISTED ABOVE

Include a separate letter with documentation.

.....

Note: Evaluation of financial aid applications, reevaluation 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.