Northeast Ohio MEDICAL UNIVERSITY

Budget Adjustment Request Instructions

Background:

The Higher Education Act, as amended, permits institutions of higher education to adjust their established Cost of Attendance on a case-by-case basis when students incur additional expenses. When making a request for a Budget Adjustment, students should adhere to the following:

- Make every attempt possible to organize their request to expedite the processing time by accompanying their request with an itemized statement showing request and total expense, followed by supporting documentation.
- Ensure expenses are incurred during the current academic year.
- Review the current Cost of Attendance to understand the current allowances prior to applying. Requests for an increase of a current item within the Cost of Attendance will be calculated by taking the difference between the incurred expense and the cost of attendance allowance.
- Thoroughly review the list of eligible items and required supplemental documentation needed prior to submitting a request.
- **Submit the budget adjustment request in an organized manner with all necessary documentation. Incomplete or unorganized requests may not be processed.**
- Understand restrictions may apply to some requests, and total incurred expense may not be reimbursed.

Application Process:

To be considered for a budget adjustment, you must submit this application and provide documentation documenting your circumstance (see acceptable forms of supplemental documentation at the end of this request form).

Your request will not be reviewed until the Office of Financial Aid receives a completed application, including all required documentation. Please allow one to two weeks after receipt for review and decision.

Submission Instructions:

Students may submit their budget adjustment request and supporting documentation to the Office of Financial Aid by:

1. Hand delivering to the Office of Financial Aid during regular business hours (M-F, 8am-5pm)
2. Securely uploading through Student Self-Service
    1. Log onto Student Self-Service
    2. Select “All Users” from the menu list
    3. Select “Secure Document Upload”
    4. Select “FA Request for Budget Adj”
    5. Upload your File, and select the file type
    6. Press Submit. A green check box will appear in the upper right-hand side of the screen letting you know the file was successfully submitted.

Allowable Expenses and Supporting Documentation Needed:

Eligible Item	Supporting Documentation	Limitations
Non-elective out of pocket medical expenses (including prescriptions)	Copy of invoice from health care provider or pharmacy and service dates	Expenses must be incurred during the academic calendar year.
Adding dependents to NEOMED health care coverage	NEOMED Financial Aid will verify your student tuition account	If monthly expenses are static per month, Financial Aid will provide an increase for the entire academic year. In cases where monthly payments vary, students will be retroactively reimbursed.
Licensed daycare or adult dependent care	Statement from provider that shows expenses and service dates	If monthly expenses are static per month, Financial Aid will provide an increase for the entire academic year. In cases where monthly payments vary, students will be retroactively reimbursed.
Criminal background check	Statement showing total expense	M2, P3, D2, and D3 students only. (Students engaged in clinical practice). Students will be provided the difference between actual expenses and cost of attendance allowance.
Residency interview expenses	• Residency interview invitation letter • Dates of service for transportation and lodging only. • Miles traveled for personal vehicles (Google or Mapquest) or copies of airline fair or car rental. • Itemized summary in excel or word that highlights each residency interview and the expenses incurred. Supporting documentation should be organized by residency interview.	M4, students only - students will be provided with the difference between actual expenses and cost of attendance allowance. D4 and P4 students only – actual expenses incurred for those electing to apply for a residency interview adjustment.
Away rotations	Detailed invoice of lodging, transportation, including training dates.	M3, M4, P4, D3, D4, and Anesthesia Year 2 and 3 students only. Away rotation is defined as being more than one hour away from the Rootstown campus and be more than one day in length.

Non-deferrable education debt	• Statement from Servicer that shows debt cannot be deferred or you have reached maximum deferment timeline. • Monthly invoices.	If monthly expenses are static per month, Financial Aid will provide an increase for the entire academic year. In cases where monthly payments vary, students will be retroactively reimbursed.
Additional recommended books and supplies	• Invoice showing expense incurred. • Statement that substantiates the purchase that differs from published book/supply list. • Statement from professor or Learning Center staff indicating the additional resources are needed for academic success.	
Transportation expenses exceeding the Cost of Attendance allowance.	• Copies of gas receipts for one month. • Invoices for annual registration/license renewal – if incurred during the academic year. • Invoices for car maintenance that shows date of service.	Cannot include the cost of purchase or monthly lease/loan payments. Students will be provided the difference between actual expenses and cost of attendance allowance.

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Budget Adjustment Request Form

Student Name _____

Student ID _____ **Academic Year** _____

Please indicate the category you are requesting a reconsideration for a budget adjustment:

_____

Checklist:

My application:

- Includes receipts for each expense that clearly show details on the expense and the date of the expense.
- Documentation is grouped together and sorted by each expense. For residency interview, documentation is grouped together and sorted by each interview.
- Multiple files cannot be uploaded at one time. It is strongly encouraged that you combine multiple files into one; otherwise, you'll need to submit a file one at a time through Student Self-Service.

CERTIFICATION: I certify that this information is complete and accurate to the best of my knowledge, and I have included appropriate documentation as indicated in the budget adjustment policy to support this request.

_____ _____

Student Signature Date