PEPPERDINE | GRADUATE SCHOOL OF EDUCATION & PSYCHOLOGY

Budget Increase Request (BIR) Form

This form is required to request consideration for an increase in your current Cost of Attendance (COA). The COA <u>can only be increased by expenses incurred **by and for** the student only.</u> All pages along with documentation must be returned via mail, drop off, or email from your Pepperdine email account.

Student's Name: _____

Campus Wide ID Number (CWID): _____ **Academic Year:** _____

The following are allowable expenses to merit consideration for a budget increase. Only the expenses incurred below during the period of enrollment from September to August will be considered. Please check all that apply.

☐ Computer Purchase (Once/academic program) ☐ Course-Related Travel
☐ Dependent care (Once/academic year) ☐ Course-Related Trip
☐ Disability
  ● Program:_____
  ● Destination: _____

In addition to this form, you are required to attach supporting documentation for each expense claimed (please read the next page for acceptable forms of verifying documentation for each category). **Requests submitted without receipts/documents will not be reviewed or processed.** As a reminder, <u>the costs need to be incurred first,</u> and then our Office can review your request with proof of purchase. Please be advised there are limits to Cost of Attendance Appeals, and thus, even if approved, the appeal may not match your full expenditure.
Complete requests must be submitted at least four (4) weeks before the end of the enrollment period/term and may take 5-7 business days to review.

If your request is approved, any increase to your COA will result in an increase in your eligibility to borrow additional federal or private loans up to your annual limit. You must meet all applicable loan requirements for the loans that you plan to use, including, but not limited to, credit approval and completion of loan counseling and master promissory notes.

All COA adjustments will be posted on the Financial Aid link on WaveNet. It will be necessary for you to accept or decline the changes made to your awards in order for aid to process. If receipts are not submitted, the BIR will be cancelled and outstanding charges will be your responsibility.

CERTIFICATION STATEMENT: I certify that all information reported and submitted is true and accurate to the best of my knowledge. I have also attached all required documentation. I understand that purposely falsifying information may lead to cancellation of my aid and prevent me from receiving financial aid in future academic years. I have read, will comply with, and understand GSEP Financial Aid Office's Terms and Conditions listed on their website. I understand that my Budget Increase Request will not be processed if required documentation is not attached.

_____   _____
Student's Signature   **Date**

07/2019

Allowance COA and Required Documentation

*Expenses that have been paid in cash require accompanying receipts verifying payment in addition to below documentation. (For debit card purchases only, a bank statement reflecting those purchases may be substituted instead of an actual receipt).

Type of Allowance	Standard Budget	Maximum budget allowance	Required Documentation
Computer/Laptop Purchase Note: Students can only request this item once per academic program.	$0	Up to $1,500	Students must prepay their computer/laptop. A copy of the receipt must be attached to this form.
Course-related Trip Note: The actual disbursement of any approved financial aid occurs during the term in which the trip is scheduled to take place even if the COA appeal is approved beforehand. A student must prepay their costs.	$0	Actual cost if: ● The trip is billed to the Pepperdine Student Account ● The trip is **not** billed to the Pepperdine Student account, **but** trip costs are handled by and paid directly to the designated agency Note: If the student elects to purchase airfare and/or lodgings separately from the above, these amounts need to be reasonable and the maximum is subject to review by GSEP Financial Aid. ● If the trip is **not** billed to the Pepperdine Student Account and the student makes arrangements on his/her own, only airfare and lodging will be considered. Amounts will be subject to review and must be reasonable.	If the trip is billed to the Pepperdine Student Account, no additional documentation needed. If the trip is **not** billed to the Pepperdine Student Account, proof of purchase (receipts or canceled checks) with the student's name is required. If needed, confirmation of the student's destination will be obtained from the program director or other authorized school official verifying that the expense is necessary and that the amount is an average and a reasonable amount. Amounts will be subject to review and must be reasonable.
Dependent Care	$0	Actual Cost	● A copy of the signed contract or letter from your child-care provider describing services

Note: Students can only request this item once per academic year			offered and their cost. Documentation must include the name of the child, your name, and anticipated costs for the academic year. ● Proof of payment (such as receipts or canceled checks) for at least two consecutive months. Proof of payment must clearly demonstrate services rendered and include dates when services were received.
Course-related travel exceeding amount included in Student Budget	$0	For transportation: ● Public transportation (airfare, bus, train) must be reasonable and subject to review ● Mileage rates for operating a personal vehicle will be based on the Internal Revenue Service's standard mileage rates For lodging: ● Actual costs subject to a maximum based on the per diem rates for lodging from the US General Services Administration https://www.gsa.gov/travel/plan-book/per-diem-rates	The student will need to make travel arrangements and provide proof of payment (such as receipts or canceled checks) for each face-to-face session throughout the program. ● Items will be reviewed on a term-by-term basis
Disability		Actual Cost ● Amounts will be subject to review and must be reasonable.	Only mandatory student expenses incurred and paid out of pocket (not covered by insurance) during the enrollment period will be considered. ● Please provide an explanation of your condition; ● Verify costs incurred via billing statement or letters from a physician; and ● Proof of payment such as receipts or canceled checks. Estimates will not be accepted. Advance approval required.

Return the completed form and accompanying required documentation to:

GSEP Financial Aid Pepperdine University

- <u>Mailing Address</u>: 6100 Center Drive, 5th Floor Los Angeles, CA 90045
- <u>Fax</u> : 310-568-2399
- <u>Email</u> via Pepperdine's Secure Attachments Service: attachments.pepperdine.edu
    - o Login using your Pepperdine email address and password
    - o Attach the form and your documents
    - o Send to gsepfaid@pepperdine.edu

For additional questions, please email or contact our office via phone at 310-568-5775.