



# Medical Student Budget Appeal Form

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
First Name

\_\_\_\_\_  
MU ID Number

I am a 1<sup>st</sup>  2<sup>nd</sup>  or 4<sup>th</sup>  Year Medical Student (10 months)

I am a 3<sup>rd</sup> Year Medical Student (12 months)

Do you share an apartment with anyone other than a spouse? Yes  No

Budget Adjustment Form for Medical Students			
	\$ Monthly	\$ Total	FAO Use Only
Rent/House Payment	\$ _____	\$ _____	\$ _____
Electric	\$ _____	\$ _____	\$ _____
Gas	\$ _____	\$ _____	\$ _____
Telephone	\$ _____	\$ _____	\$ _____
Water	\$ _____	\$ _____	\$ _____
Other Utility: _____	\$ _____	\$ _____	\$ _____
Other Utility: _____	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____
Food	\$ _____	\$ _____	\$ _____
Transportation	\$ _____	\$ _____	\$ _____
Child care costs (Provide name and age of children in comment section on the back of this form.)	\$ _____	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____	\$ _____
<b>TOTAL:</b>	\$ _____	\$ _____	\$ _____

**COMMENT SECTION:** You **MUST** provide a detailed explanation below as to why you are requesting a budget adjustment. Attach additional sheets if necessary.

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I certify that the above is true to the best of my knowledge. If it is found to be otherwise, I understand that this may represent a punishable act of fraud against the United States Government and/or that I may forfeit all additional eligibility for assistance.

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**E-mail Address**

\_\_\_\_\_  
**Telephone Number**

FAO USE ONLY	
\$ _____ Total for _____ months - \$ _____ standard budget amount for same months = \$ _____ monthly increase x _____ = \$ _____	
\$ _____ One-time allowable expense for:	<b>TOTAL INCREASE = \$ _____</b>

## **Budget Adjustments/Contribution Adjustments**

Adjustments are allowed by the Office of Student Financial Assistance on a student by student basis. Listed below are some of the items which are eligible for review based on individual circumstances. Adjustments are made to increase a student's eligibility for assistance and to recognize a student's current situation. Please understand any adjustment made to your family contribution and/or budget must be documented for review by auditors. Also, it must be an item that we can consider "customary and reasonable" in nature and related to your educational experience at the Joan C. Edwards School of Medicine.

### **Appeal of Standard Budget (Cost of Attendance)**

Complete and sign a budget appeals form and submit it for review to Prudy Barker, Assistant Director for Student Financial Assistance, MUJCE School of Medicine, located in the Office of Student Affairs, Suite 3418, 1600 Medical Center Drive, Huntington, WV 25701. Any questions regarding the appeal or other circumstances should be addressed to Prudy as well at 304-691-8739 or email [barkerp@marshall.edu](mailto:barkerp@marshall.edu).

### **What can be added to the budget?**

**Living Expenses** – Allowable expenses that exceed established base budget items.

Note: Copies of receipts for rent/mortgage and all monthly utility receipts are required.

**Child Care Expenses** - Only child care expenses incurred during your period of enrollment will be allowed. Documentation must be provided by a licensed day care facility.

**Medical Expenses** - Medical expenses incurred during the academic year not covered by insurance could result in an adjustment for the student only.

**Two Household Expense** – For details of possible adjustments, contact Prudy Barker.

**Auto Repair** – Access to an automobile is considered a requirement for medical students to meet the demands of community-based education in the curriculum. You cannot, however, request additional aid to purchase a car and financial aid cannot be budgeted for car payments or for auto rental/leasing. However, reimbursement is allowed for auto repairs only as well as purchase of tires. An allowance has been considered in the established financial aid budget to cover general car upkeep and maintenance.

### **What is NOT part of the budget?**

**Consumer Debt**– including student loans, personal loans, and automobile payments. Do your best to eliminate debt before beginning your studies.

**Residency Interviews** – The Department of Education considers the expense of residency interviews to be a career cost not an educational cost. However, there are alternative loans to cover these expenses.

**Home repairs** – any type of home repairs are not considered as part of your educational costs.