Budget Adjustment Requests

USF Health Office of Financial Aid

Class of 2024 – 4th Year

Budget Adjustment Request

A request to increase a student’s cost of attendance for allowable educational expenses. These expenses must occur during the term or aid year of purchase. This allows for additional aid, usually in the form of loans.

Most Common Adjustments for MD4

ERAS*

*Included in your cost of attendance(COA) for 4th year are the ERAS fees in the amount of $1,300. If you have exceeded this allowance, then we can make an adjustment for the difference.

Externships/Away Rotations

Interview Travel

Budget Adjustment Process

1. Request
2. Documentation
3. Review
4. Approve/Deny

Budget Adjustment Deadline for 23/24
April 3rd, 2024

1. REQUEST

- Schedule a MS Teams/phone appointment to meet with an advisor. Request form created
- Requirement posted on OASIS

2. DOCUMENTATION

- Gather required documents
- Complete the form
- Upload as one document on OASIS
- All documents must be submitted by the deadline date of 4/3/2024

Budget Adjustment Deadline for 23/24
April 3rd, 2024

3. REVIEW

- 2 weeks for processing
- Monitor OASIS
- Complete additional loan application (If necessary-advisor will advise you)

4. APPROVAL/INCOMPLETE

- Incomplete documentation: go back to step 2
- Approved – budget increased; additional loans processed

Required Documentation for Travel

Budget Adjustment Request Form

Travel Expense Report Spreadsheet

Copies of Receipts

- ***All receipts must be in the student's name!***
- ***Airfare***: Need paid receipt showing name, payment, and destinations
- ***Lodging***: Reservation confirmation not adequate; need actual receipt from end of stay. Personal rentals/stays need proof of agreement (i.e. lease) and proof of payment.
- ***Rental Car***: Reservation not adequate; need receipt from the end of rental period
- ***Fuel***: Receipts for fuel purchases only for rental cars. Not valid if driving personal vehicle
- ***Ground Transportation***: Includes taxis, shuttles, train tickets, bus tickets, rideshare (Uber, Lyft), etc. Need receipts showing locations.
- ***Parking***: Receipts for parking related to travel
- ***Miscellaneous***: Any other related travel expenses not already listed

Map Printouts (if applicable)

- If using personal vehicle, mileage is reimbursed according to map printouts. Maps must show actual addresses of destinations. Indicate if round-trip.
- Standard mileage rate is $0.51 per mile

Letter for Externships / Away Rotations

- Letter from the Office of Student Affairs stating that externship was required in order to sucessfully match

Please Be Advised

- You must meet with an advisor to start the process. Must be during the term/aid year of purchase.
- The form is customized for each student and is signed by the advisor.
- The processing time is up to 2 weeks, but may take longer if volume increases or addt'l documentation is needed.
- If you have not received aid up to your COA and still have room in your budget, you may not need to request an adjustment.
- The budget adjustment form is NOT available online. You cannot share or use another classmate's form.
- Suggestion: keep track of all expenses in a spreadsheet after each trip is completed. It is much easier to gather documents as you go versus trying to gather everything at the end of the year.
- Adjustments will NOT be done after the 4/3/2024 deadline.

Visit Our Website: health.usf.edu/well/financialaid

Ways to Connect

- Contact Us Via – ServiceNow, MS Teams Advising – Phone & Virtual Appointments

- In Person Advising - MCOM Downtown – MDD 5th Floor

- USF Health Financial Literacy
  - One on One Coaching, Presentations, and Workshops.