

Financial Aid Budget Worksheet

2009-10

INSTRUCTIONS

Use this worksheet to estimate whether or not you owe a balance or will receive a Financial Aid refund. Simply fill in the tan shaded amounts. If the amount is zero, leave blank.

SECTION A. Calculate Charges per Quarter (Refer to housing contract for housing and meal plan charges. Or estimate your charges using information at <http://www.housing.ucsc.edu/rates-all.html>.)

			CA Resident	Non-Resident
1	Fees For One Quarter	1		
2	Additional Fees	2	N/A	
3	Non-Resident Tuition	3	N/A	
4	On-Campus Room/Board	4		
5	TOTAL CHARGES (Add lines 1 – 4)	5		

SECTION B. Calculate Credits per Quarter (Enter accepted fall quarter amount from your Financial Aid Offer.)

			CA Resident	Non-Resident
6	Scholarships	6		
7	University Grant	7		
8	University Fee Grant	8		
9	Pell Grant	9		
10	Cal Grant ¹ , Cal Veteran, or other grant	10		
11	Federal Direct Loan (deduct 1% from total amount for loan fee)	11		
12	Perkins Loan	12		
13	Other Aid (do <i>not</i> include work study)	13		
14	TOTAL CREDITS (Add lines 6-15)	14		

SECTION C. Calculate Balance Due or Refund Amount

			CA Resident	Non-Resident
15	Enter Total Charges (from line 5)	15		
16	Enter Total Credits (from line 14)	16		
17	BALANCE DUE or REFUND AMOUNT ² (Subtract line 16 from line 17)			

Notes:

- Do not include Cal Grant B Access (stipend) payments on this worksheet. These will always refund directly to the student to help pay educational expenses. The amount is \$517 per term for full-time students.
- Calculate your estimated balance: If the balance is positive you will need to make a payment. Or, if balance is negative you will receive an aid refund around the first business day of the term.