



## Tips for Completing the Excelsior Scholarship Application

This document is provided as a guide on how best to respond to questions on the Excelsior Scholarship application that have been frequently asked about the Excelsior Scholarship Program.

### RESIDENCY

**1. Are you currently a resident of New York State and have you been a resident of New York State for 12 continuous months prior to the beginning of the term?**

Answer YES if New York State is your home state and has been your home state for the past 12 months.

Transfer students who are transferring to a SUNY or CUNY college from an out-of-state school should also answer YES if they are (1) financially dependent on their parents' income and (2) their parents resided in NYS while they attended a college outside of NYS.

Answer NO if you are only in NYS because you are attending a SUNY or CUNY college and live with a parent(s) who are residents of another state.

**2. Did you and your parent(s) or your spouse, as applicable, file a 2015 IT-203 New York State Nonresident and Part-Year Resident Income Tax Return(s)?**

Please look at the name on your 2015 NYS Tax Return.

You will most likely have filed an IT-201 NYS Tax Return. You or your parents will only have filed a 2015 IT-203 New York State Income Tax Return if you or your parents did not reside in New York State for 12 continuous months.

Answer NO if the NYS tax return states that it is the IT-201.

Answer YES if the tax form filed was the NYS IT-203 New York State Nonresident Income Tax Return.

### FEDERAL ADJUSTED GROSS INCOME

**What was your combined federal adjusted gross income, as reported on the 2015 income tax return(s) filed by you and your parent(s) or your spouse, as applicable?**

You should enter your federal Adjusted Gross Income (AGI), as reported on line 19 of the 2015 IT-201 New York State Resident Income Tax Return form.

*Whose Income Should I Report:* If you are an applicant who was claimed as a dependent by your parent(s) on their income tax return, you should report both income which you earned and income which your parent(s) earned. If you are an applicant who is married, you should report both income which you earned and income which your spouse earned, even if you filed separately.

*Why is This Reported?* Your AGI will be used to determine whether you meet the \$100,000 income requirement to be eligible for an award for the 2017-18 academic year.

If you were not required to file a NYS Income Tax Return for the 2015 tax year, you should enter \$0 for your income. Income information will be verified through the New York State Department of Taxation and Finance.

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## THE FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA) AND THE STUDENT AID REPORT (SAR)

### 1. Did you file a completed Free Application for Federal Student Aid (FAFSA) form?

To be eligible to apply for the Excelsior Scholarship, you must have filed a completed Free Application for Federal Student Aid (FAFSA) form.

To make corrections to your FAFSA, you will need to login from the homepage by using your FSA ID, click “Make FAFSA Corrections,” and add or correct the information that caused your FAFSA to be incomplete.

You can also add or correct information on your paper Student Aid Report (SAR), sign and mail it. For more information on filing or completing the FAFSA, visit [fafsa.ed.gov](http://fafsa.ed.gov).

### 2. Did you receive your Student Aid Report (SAR) with your Expected Family Contribution?

If your FAFSA is complete, your Expected Family Contribution (EFC) will be displayed on your Student Aid Report (SAR). Your EFC is not the amount of money your family will have to pay for college, nor is it the amount of federal student aid you will receive. It is a number used by your school to calculate the amount of federal student aid you are eligible to receive.

## TAP AND YOUR NEW YORK STATE NET TAXABLE INCOME

**To be eligible, applicants must have already filed a completed New York State Tuition Assistance Program (TAP) application, if eligible for a TAP award.**

You must have filed a TAP application if the combined net taxable income, including taxable and untaxed pensions, as reported as reported on [lines 26, 29 and 37](#) of your 2015 IT-201 New York State resident income tax return form(s) was \$80,000 or less.

Net taxable income is the income reported on line 37 of your 2015 IT-201 Tax Form.

Pension income is the income reported on lines 26 and 29 of your 2015 IT-201 Tax Form.

*Whose Income Should I Report:* If you are an applicant who was claimed as a dependent by your parent(s) on their income tax return, you should report both income which you earned and income which your parent(s) earned. If you are an applicant who is married, you should report both income which you earned and income which your spouse earned, even if you filed separately.

*Why is This Reported?* Your net taxable income will be used to determine whether you meet the \$80,000 income requirement to file a TAP application. You will be eligible for an Excelsior Scholarship if your net taxable income is over \$80,000, provided your federal Adjusted Gross Income is \$100,000 or less.

If you were not required to file a NYS Income Tax Return for the 2015 tax year, you should enter \$0 for your income.

Income information will be verified through the New York State Department of Taxation and Finance.

For more information, visit [hesc.ny.gov/tap](http://hesc.ny.gov/tap).

## PARENT INFORMATION/SPOUSE INFORMATION

**Provide the name(s) and social security number(s) of each parent listed on your 2015 New York State income tax return.**

**Provide the name and social security number of your spouse listed on the 2015 New York State income tax return(s) filed by you and/or your spouse.**

To verify your income information, you must enter the names and social security numbers of the applicant and the applicant's parent(s) or the applicants spouse EXACTLY as it appears on the 2015 IT-201 Tax Form.

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## COLLEGE HISTORY

**1. Did you take a college course(s) for purposes other than pursuing a certificate or a degree and are now pursuing a degree for the first time?**

Answer YES if you have taken courses for employment or various other personal reasons and are now pursuing a degree for the first time.

Answer NO if you have previously sought to earn a certificate or undergraduate degree.

**2. During your lifetime college experience, how many terms did you attend college, even if you did not complete the term?**

Enter the number of terms that you began a spring or fall term only.

Do not include a summer or winter term(s).

**3. During your lifetime college experience, how many terms did you complete?**

Enter the number of terms that you completed.

This number may be less than the number of terms that you began, given you may have experienced a personal hardship.

If you are disqualified because you failed to complete a term due to a personal hardship, please contact HESC at [excelsior@hesc.ny.gov](mailto:excelsior@hesc.ny.gov) so that your application may be reviewed for further processing.

**4. During your lifetime college experience, were you continuously enrolled as a college student, without a break, excluding summer sessions?**

Answer YES if you both attempted and completed all of your fall and spring terms successively without interruption.

Answer YES if you had a break due to a personal hardship that was approved by your college.

Answer NO if you stopped out between terms for reasons other than a personal or family hardship that was approved by your college.