Excelsior Scholarship

SUNYFAP
April 2018
Who is Eligible
Eligibility

- Be a resident of NYS and have resided in NYS for 12 continuous months prior to the beginning of the term
- Be a U.S. citizen or eligible non-citizen
- Have graduated from high school in the U.S., earned a high school equivalency diploma, or passed a federally approved “ability to benefit” test as defined by Commissioner of State Education Dept.
- Have a combined federal adjusted gross income of $110,000 or less for 2018-19 and $125,000 or less for 2019-20 and thereafter;
- Be pursuing an undergraduate degree at a SUNY or CUNY college, including community colleges and statutory colleges at Cornell University and Alfred University
Eligibility

• Be enrolled in at least 12 credits in program of study each term and successfully complete 30 credits in program of study each evaluation year with no break in attendance
• Credits earned as a non-matriculated student may be included in the enrolled in 12 credits each term requirement
• If attended college prior to 2018-19, earned at least 30 credits each year, with no break in attendance, in degree program prior to applying for Excelsior
• Be in a non-default status on a student loan made under any NYS or federal education loan program or on repayment of any NYS award
• Be in compliance with terms of service condition(s) imposed by a NYS award that he or she has previously received
• Execute a Contract agreeing to reside in NYS for the length of time the award was received, and, if employed during such time, be employed in NYS
Eligibility

• Up to two years for an associate’s degree
• Up to four years for a bachelor’s degree
  – Five years for undergraduate programs normally requiring five years of study
Continued Eligibility

- Enroll in at least 12 credits per term and complete 30 credits per year
  - Must be in program of study
  - Excludes remedial classes
  - Summer and/or winter terms can be added to reach 30 credits
Eligibility – ADA students

• Must be continuously enrolled and complete same number of credits attempted each term
• If student did not earn credits for all courses attempted, missing credits can be earned during Summer and/or Winter sessions to get back on track
How to Apply – First-time applicants

- First time applicants must complete Excelsior Scholarship web application
- No additional documentation required unless applicant chooses not to e-sign
- Application available March 26 – July 23
- Complete FAFSA and NYS Student Aid Payment application
Returning Recipients

• Complete FAFSA and NYS Student Aid Payment Application each year to request Excelsior Scholarship award payment
Eligibility Determination

• Internal evaluation:
  – FAFSA filed
  – TAP application filed (if required)
  – NYS residency
  – Income verification
Eligibility Determination

• Income verification
  – Income will be verified through NYS Department in Tax and Finance
  – Federal AGI – line 19 of the NYS TAX return (IT-201) will be used
Eligibility Determination

• Income flexibility change in State Budget
  – Income from 2016 will be used except under the following conditions:
    • Death, disability divorce or separation during 2017 or 2018
    • applicants required to complete Income Appeal form and provide documentation to support request to use 2017 income
Reviewing Academic Records
Eligibility Determination

• External Evaluation
  – Credit verification: all applicants
  – Schools must provide credit history for each student
  – Information sent and returned through a flat file
Credit Verification

- ITS generates files with potential Excelsior recipients and sends to schools
- Schools verify each applicant’s attendance and credits earned
- Schools must report total number of credits earned by students toward their programs of study
- Files sent and received using HESC/ITS’s existing file transfer system
  - HESC to school: HE8838 Excelsior Credit Certification Request file
  - Schools to HESC:
    - HE8839 – Excelsior Student Credit Verification Response
    - HE8869 – Excelsior Student Credit Verification Response Spreadsheet
Review Academic Records

- Classes must be toward program(s) of study
- Credits by exam
- Military duty classes
- Non-matriculated students
- Final term exceptions
Prior College History

• Credits previously earned and accepted by college may be used to fulfill 30-credit requirement for look back
  – AP courses
  – Courses taken as a nonmatriculated student
Determining Excelsior Scholarship Awards
Calculating Award Amounts

• Maximum per term award is $2,750 plus an Excelsior credit of $485
• Amount is reduced depending on the amount of applicable other student financial aid
• No minimum award
Calculating Award Amounts

- 2016-17 SUNY resident tuition rate
  - Deduct financial aid that covers tuition expense: TAP/Pell, private scholarships, Tuition Credits, SEOG
  - Do not deduct awards designated for non-tuition expenses: housing, books, computer equipment
  - Do not deduct Federal student loans, college work study
Changes in Awards

• Changes to Federal/State Aid
  – Student accounts
  – HESC report

• Special circumstances
  – Approved leave of absence, medical
Declined Awards

• Before signing contract
  – Email to declineexcelsior@hesc.ny.gov
  – System updated
  – Student does not appear on SSL

• After signing contract
  – Call HESC
  – Email to declineexcelsior@hesc.ny.gov
  – System updated
  – SSL reflects updated information
Managing the Excelsior Recipient’s Tuition Charge
Freezing Tuition at 2016-17 Rate

• Student incurred full tuition liability and:
  – Tuition charge liability exists after deducting required financial aid
  – Tuition liability subsequently drops to zero after receiving additional aid
  – tuition liability newly exists after initially receiving a zero dollar award
  – Enrolled in 12 credits applicable to program of study
  – Drops below 12 credits
Charging Tuition at Current Year Rate

- Student incurred full tuition liability and:
  - No tuition charge liability exists after deducting required financial aid
  - Not enrolled in 12 credits
Summer/Winter Coursework

• Tuition freeze applies to Fall and Spring terms only
• Summer and Winter tuition not frozen at 2016-17 rates
Losing Future Eligibility
Loss of Eligibility

• Failure to complete 30 credits within 365-day evaluation period
  – Cannot regain eligibility
• Income exceeds threshold
  – Can apply for payment in future years
• NYS Residency
  – Student will remain ineligible if no longer NY resident
How Lose of Eligibility Affects Payment

• Failure to complete 30 credits:
  – First term award will be paid
  – Student is ineligible for any future awards
Contact Information:

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