

**EXCELSIOR SCHOLARSHIP PROGRAM  
INCOME ELIGIBILITY DETERMINATION FORM**

If you were recently notified of your ineligibility for the Excelsior Scholarship because your household federal adjusted gross income (AGI) is greater than \$125,000, and your income was adversely affected due to a disability, divorce or separation of the applicant, parent or spouse or the death of a parent or spouse, you may be eligible to use your current income to establish income eligibility.

To request a review of your eligibility based on your current income, complete sections I through II of this form. Upload the completed form and all required documentation as instructed in section II to: <https://www.hesc.ny.gov/ExcelsiorDetermination>.

**\*Please note for the purpose of determining final income eligibility, all required information and documentation must be provided when submitting the Income Eligibility Determination Form.**

**The eligibility determination made upon review of your documentation shall be based on the rules governing the Excelsior Scholarship program and shall be the final agency determination.**

**I. STUDENT INFORMATION**

1. Name (Last, First, MI): \_\_\_\_\_
2. SSN (last four digits): \_\_\_\_\_
3. Date of birth: \_\_\_\_\_

**II. BASIS OF APPEAL**

Check the basis for your appeal and provide the documentation as indicated.

	<b>REASON</b>	<b>REQUIRED DOCUMENTATION</b>
	Death of a parent or spouse	<ol style="list-style-type: none"> <li>1. Death Certificate and Statement of Relationship</li> <li>2. Copy of the most recent pay stub for the surviving parent.                             <ol style="list-style-type: none"> <li>a. Indicate payment frequency: weekly, biweekly, semimonthly, or monthly</li> </ol> </li> <li>3. Pension income information</li> <li>4. Copy of most recent W2 tax form(s), 1099 tax form(s) and NYS Tax Return(s) for applicant and parent or spouse, as applicable</li> </ol>
	Divorce of a parent or the applicant	<ol style="list-style-type: none"> <li>1. Divorce Decree filed with the Court</li> <li>2. Copy of the most recent pay stub for the custodial parent.                             <ol style="list-style-type: none"> <li>a. Indicate payment frequency: weekly, biweekly, semimonthly, or monthly</li> </ol> </li> <li>3. Pension income Information</li> <li>4. Copy of most recent W2 tax form(s), 1099 tax form(s) and NYS Tax Return(s) for applicant and parent or spouse, as applicable</li> </ol>

	Separation of a parent or the applicant	<ol style="list-style-type: none"> <li>1. Separation Decree or Separation Agreement filed with the Court</li> <li>2. Copy of the most recent pay stub for the custodial parent. <ol style="list-style-type: none"> <li>a. Indicate payment frequency: weekly, biweekly, semimonthly, or monthly</li> </ol> </li> <li>3. Pension Income Information</li> <li>4. Copy of most recent W2 tax form(s), 1099 tax form(s) and NYS Tax Return(s) for applicant and parent or spouse, as applicable</li> </ol>
	Total and permanent physical or mental disability of a parent, spouse or applicant	<ol style="list-style-type: none"> <li>1. Physician's statement, including: <ol style="list-style-type: none"> <li>a. Certification that the disability is total and permanent</li> <li>b. Date parent, spouse or applicant became totally and permanently disabled</li> </ol> </li> <li>2. Copy of the most recent pay stub for the nondisabled parent. <ol style="list-style-type: none"> <li>a. Indicate payment frequency: weekly, biweekly, semimonthly, or monthly</li> </ol> </li> <li>3. Copy of the Social Security Disability (SSI) benefits for disabled applicant, parent or spouse</li> <li>4. Pension income Information</li> <li>5. Copy of most recent W2 tax form(s), 1099 tax form(s) and NYS Tax Return(s) for applicant and parent or spouse, as applicable</li> </ol>

**STUDENT AFFIRMATION (Required)**

**By my signature below, I affirm, under penalty of perjury, the information I provided, and any supporting documentation submitted are true and complete and will be accepted for all purposes as the equivalent of a sworn affidavit.**

**Student Signature** \_\_\_\_\_ **Date** \_\_\_\_\_