



Excelsior Scholarship Program — How to Calculate Awards

1. EXCELSIOR SCHOLARSHIP AWARD CALCULATION

The Excelsior Scholarship is a last dollar tuition award.

The maximum Excelsior Scholarship award is \$5,500. The Excelsior Scholarship tuition credit, calculated by HESC after certification, covers any remaining liability up to actual tuition.

An Excelsior Scholarship Recipient is any person who was, in any year, determined to be eligible for an award and who signed the Excelsior Contract, regardless of whether award dollars were actually disbursed on the recipient's behalf.

For purposes of the Excelsior Scholarship, references to "term" means Fall or Spring terms only, unless otherwise specified.

1.1 Determining an Excelsior Scholarship Recipient's Award Amount

To determine a recipient's award amount, the **2016-17 resident tuition rate** charged by SUNY State-operated colleges (\$6,470) or CUNY Senior colleges (\$6,330) or actual tuition at SUNY and CUNY community colleges, whichever is less, is **reduced by the amount of certain other student financial aid** the recipient has or will receive for the academic year.

To determine the amount of a recipient's Excelsior Scholarship award, schools must deduct all aid listed below from the 2016-17 resident tuition rate charged by SUNY or CUNY:

- Pell Grant
- TAP Award
- TAP Tuition Credit
- SEOG Grant
- ACCESS/VR
- Institutional Scholarship (unless specifically designated as a non-tuition award only)
- Outside scholarships (unless specifically designated as a non-tuition award)
 - › Funds that are identified for cost of attendance (COA), tuition, or no designation at all must be included in the calculation of an Excelsior Scholarship award.
 - › The outside scholarship's "non-tuition award" designation must apply to both recipients of the Excelsior Scholarship and non-Excelsior Scholarship recipients.
- Financial assistance paid to opportunity program students through the EOP, SEEK or College Discovery program should be deducted if the aid is used to pay the students' tuition expense. If such financial assistance is used for transportation, books or other nontuition expenses, it should not be deducted when calculating the Excelsior Scholarship award amount.

1.2 How to Calculate the Excelsior Scholarship Award Amount

Excelsior Scholarship awards are determined on a term basis for each Fall and Spring semester. Students enrolled in Summer and/or Winter sessions are not eligible for Excelsior Scholarship award payments for such sessions.

SUNY State-operated Colleges: For SUNY State-operated colleges, the award should be calculated for a term by deducting all applicable financial aid, as described in section 1.1 above, for the term from \$3,235 (i.e., one-half of \$6,470

Excelsior Scholarship Program — How to Calculate Awards

annual tuition rate).

CUNY Senior Colleges: For CUNY Senior Colleges, the award should be calculated for a term by deducting all applicable financial aid, as described in section 1.1 above, for the term from \$3,165 (i.e., one-half of \$6,330 annual tuition rate).

Community Colleges: For SUNY and CUNY community colleges, the award should be calculated for a term by deducting all applicable financial aid, as described in section 1.1 above for the term from one-half of the 2016-17 annual resident tuition rate.

In all instances, if the tuition liability remaining is greater than zero and less than or equal to \$2,750 (i.e., one-half of annual \$5,500 maximum award), the Excelsior Scholarship will cover the entire remaining tuition expense.

SUNY State-operated Colleges: For SUNY State-operated colleges, if the tuition liability remaining is **greater than** \$2,750, the Excelsior Scholarship will cover \$2,750 and the Excelsior Scholarship tuition credit will cover the remaining tuition expenses, up to \$485 (half of the \$970 annual tuition credit).

CUNY Senior Colleges: For CUNY Senior Colleges, if the tuition liability remaining is **greater than** \$2,750, the Excelsior Scholarship will cover \$2,750 and the Excelsior Scholarship tuition credit will cover the remaining tuition expenses, up to \$415 (half of the \$830 annual tuition credit).

Community Colleges: For community colleges, if the tuition liability remaining is greater than \$2,750, the Excelsior Scholarship will cover \$2,750 and the Excelsior Scholarship tuition credit will cover the remaining tuition expenses, up to half of the annual tuition credit.

Awards that may be unequally split between terms should be reflected as applied to each term.

For example, if a student will receive a \$500 private scholarship in which \$300 is awarded for the first term and \$200 is awarded for the second term, the college should subtract \$300 from the \$3,235 tuition charge (SUNY) or the \$3,165 tuition charge (CUNY) when calculating the first term Excelsior Scholarship amount and subtract \$200 from the tuition charge when calculating the second term Excelsior Scholarship amount.

1.3 Excelsior Scholarship Recipients Whose Tuition is Covered by Other Aid

Recipients whose tuition is fully covered by other financial aid remain Excelsior Scholarship Recipients but receive \$0 for that term. Recipients who have a \$0 award do not need to submit an Excelsior Scholarship application in subsequent years, and will be charged the current year tuition rate in each term for which their award remains at \$0. Such recipients who subsequently have an award greater than \$0 will be charged the 2016-17 tuition rate.

1.4 Excelsior Scholarship Recipients Whose Tuition is Not Covered by Other Aid

Recipients whose tuition is *not* covered by the above resources will receive an Excelsior Scholarship award up to \$5,500 per year. Any tuition remaining above the \$5,500 award is covered by the Excelsior Scholarship tuition credit.

2. TUITION RATES/TUITION FREEZE AND AWARD CALCULATION

Excelsior Scholarship award amounts should be calculated using the 2016-17 annual resident tuition rate.

2.1 When to Charge the 2016-17 Tuition Rate

For recipients appearing on the Student Status Listing, 2016-17 tuition should be charged if at the date that the student incurs a full tuition liability (Note: this may be referred to as the drop/add deadline date or certification status date if that's the date when the school determines enrollment status for financial aid purposes):

- There is a remaining tuition charge after deducting all required financial aid from the 2016-17 tuition rate (i.e., all federal/state/institutional or private student financial aid other than loans, work study, or awards designated for non-tuition expenses); and

Excelsior Scholarship Program — How to Calculate Awards

- The recipient is enrolled in 12 credits.

A recipient who, *after the above identified full tuition liability date*, receives additional financial aid which brings his or her Excelsior Scholarship award amount down to zero, must continue to be charged the 2016-17 tuition rate for the subsequent Spring or Fall term within the 365-day period.

A recipient who, *after the above identified full tuition liability date*, drops below 12 credits must continue to be charged the 2016-17 tuition rate for the subsequent Spring or Fall term within the 365-day period.

A recipient who, *after the above identified full tuition liability date*, loses an award for any reason but remains enrolled at the institution, must continue to be charged the 2016-17 tuition rate for the subsequent Spring or Fall term within the 365-day period.

A recipient who initially received a zero award (and was, therefore, charged the current year tuition rate) and who incurs a tuition liability *after the above identified full tuition liability date* due to the loss of federal/state/institutional or private financial aid, must be charged the 2016-17 tuition rate if he or she is now eligible to receive an Excelsior Scholarship award payment.

Note: An Excelsior Scholarship Recipient whose 2016-17 tuition liability is fully funded by other financial aid may incur a tuition liability when charged for the current year tuition rate.

2.2 When to Charge the 2018-19 Tuition Rate

For recipients appearing on the Student Status Listing, 2018-19 tuition should be charged if at the date the student incurs a full tuition liability (Note: this may be referred to as the drop/add deadline date or certification status date if that's the date when the school determines enrollment status for financial aid purposes):

- There is no remaining tuition charge after deducting all required financial aid from the 2016-17 tuition rate (i.e., all federal/state/institutional or private student financial aid other than loans, work study, or awards designated for non-tuition expenses).
- The recipient is not enrolled in 12 credits.

A recipient who, *before the above identified full tuition liability date*, receives additional financial aid which brings his or her Excelsior Scholarship award amount down to zero, must be charged the 2018-19 tuition rate.

A recipient who, *before the above identified full tuition liability date*, drops below 12 credits must be charged the 2018-19 tuition rate.

A recipient who does not meet the credit requirement *after the second semester* is no longer deemed an Excelsior Scholarship recipient, is ineligible for any future awards and charged the current tuition rate going forward. Such students will retain their first term award and will lose their second term award.

Note: An Excelsior Scholarship Recipient whose 2016-17 tuition liability is fully funded by other financial aid may incur a tuition liability when charged for the current year tuition rate.

2.3 Excelsior Scholarship Recipient Tuition Charges for Summer Coursework

The Excelsior Scholarship does not apply to Summer courses. Therefore, a home college or host college should charge Excelsior Scholarship recipients the same Summer or Winter tuition rate charged to all other students.

2.4 Supplemental Assistance Provided to Opportunity Program Students and the Excelsior Award Calculation

Financial assistance paid to opportunity program students through the EOP, SEEK or College Discovery program should be deducted if the aid is used to pay the students' tuition expense. If such financial assistance is used for transportation,

Excelsior Scholarship Program — How to Calculate Awards

books or other nontuition expenses, it should not be deducted when calculating the Excelsior Scholarship award amount.

2.5 Issues Affecting Tuition Rates

2.5.1 Community College Non-Resident Tuition Rates

Excelsior Scholarship awards cover NYS resident tuition only. Students attending a community college outside their home county and who are charged a higher nonresident tuition rate must submit a valid Certificate of Residency from their home county to be eligible for resident tuition rates. The Excelsior Scholarship will only cover the resident tuition rate and the student will be liable for the remaining tuition charges.

2.5.2 University Centers and SUNY Statutory Colleges

The Excelsior Scholarship award covers the standard 2016-17 resident tuition rate at the State University of New York (or \$6,470). Excelsior Scholarship Recipients attending a university center or statutory college and who are charged a higher tuition rate will receive a maximum award of \$6,470 through a combination of the Excelsior Scholarship award and the Excelsior Scholarship tuition credit.

2.5.3 Credits Beyond the Full-time Standard

The Excelsior Scholarship will not cover the extra tuition amount for students who choose to take extra classes that result in a higher tuition rate (typically in excess of 18 credits per term).

2.5.4 Summer or Winter/Intersession Terms

The Excelsior Scholarship does not apply to Summer or Winter/Intersession courses. Therefore, schools should charge Excelsior Scholarship recipients the same Summer or Winter/Intersession tuition charged to all other students. The credits earned in Summer or Winter/Intersession may be used to fulfill the 30-credit per year requirement.

2.8.5 ADA Students

ADA students receiving an Excelsior Scholarship are charged tuition based on the actual number of credits taken using the 2016-17 per-credit tuition rate.

2.8.6 Study Abroad

The 2016-17 tuition rate should be charged for Excelsior Scholarship Recipients participating in study abroad programs. Excelsior Scholarship recipients are eligible to use their awards towards tuition whether the study abroad program host school is a public college, private college, located with New York State or outside of New York State or outside of the United States.