

STATE OF NEW YORK

1207

2023-2024 Regular Sessions

IN ASSEMBLY

January 13, 2023

Introduced by M. of A. ZEBROWSKI -- read once and referred to the
Committee on Higher Education

AN ACT to amend the education law, in relation to reflecting a change in
circumstance when making adjustments to income

The People of the State of New York, represented in Senate and Assem-
bly, do enact as follows:

1 Section 1. Subdivision 5 of section 663 of the education law, as
2 amended by section 3 of part J of chapter 58 of the laws of 2011, is
3 amended to read as follows:

4 5. Adjustments of income. a. In the determination of income for
5 purposes of paragraphs a and b of subdivision three of section six
6 hundred sixty-seven of this part if, during the academic year in which
7 the applicant will receive an award, one of either the parents of the
8 applicant or other dependent child of such parents, the spouse of the
9 applicant, or one or more dependent children of the applicant, in addi-
10 tion to the applicant, will be in full-time attendance in an approved
11 program, the combined net taxable income determined under subdivision
12 one of this section shall be reduced by three thousand dollars and an
13 additional two thousand dollars for each other such person additional to
14 the aforesaid persons (including the applicant) who will be in such
15 attendance, and the resulting amount shall be deemed the applicable
16 income in determining the applicant's award for the academic year.

17 b. When making adjustments to income to reflect a change in circum-
18 stance, the corporation shall, pursuant to rules and regulations,
19 include the following causes for change in status of the applicant: (1)
20 loss of employment of the applicant or parent of the applicant; (2)
21 catastrophic illness of the applicant; or (3) the applicant or the
22 spouse of the applicant is called to active military duty.

23 § 2. Subdivision 1 of section 669-h of the education law, as amended
24 by section 1 of part T of chapter 56 of the laws of 2018, is amended to
25 read as follows:

EXPLANATION--Matter in italics (underscored) is new; matter in brackets
[-] is old law to be omitted.

LBD03218-01-3

1 1. Eligibility. An excelsior scholarship award shall be made to an
2 applicant who: (a) is matriculated in an approved program leading to an
3 undergraduate degree at a New York state public institution of higher
4 education; (b) if enrolled in (i) a public institution of higher educa-
5 tion prior to application, has completed at least thirty combined cred-
6 its per year following the student's start date, or its equivalent,
7 applicable to his or her program or programs of study or (ii) an insti-
8 tution of higher education prior to application, has completed at least
9 thirty combined credits per year following the student's start date, or
10 its equivalent, applicable to his or her program or programs of study
11 and which were accepted upon transfer to a public institution of higher
12 education; (c) enrolls in at least twelve credits per semester and
13 completes at least thirty combined credits per year following the
14 student's start date, or its equivalent, applicable to his or her
15 program or programs of study except in limited circumstances as
16 prescribed by the corporation in regulation. Notwithstanding, in the
17 student's last semester, the student may take at least one course needed
18 to meet his or her graduation requirements and enroll in and complete at
19 least twelve credit hours or its equivalent. For students who are disa-
20 bled as defined by the Americans With Disabilities Act of 1990, 42 USC
21 12101, the corporation shall prescribe rules and regulations that allow
22 applicants who are disabled to be eligible for an award pursuant to this
23 section based on modified criteria; (d) has an adjusted gross income for
24 the qualifying year, as such terms are defined in this subdivision,
25 equal to or less than: (i) one hundred thousand dollars for recipients
26 receiving an award in the two thousand seventeen--two thousand eighteen
27 academic year; (ii) one hundred ten thousand dollars for recipients
28 receiving an award in the two thousand eighteen--two thousand nineteen
29 academic year; and (iii) one hundred twenty-five thousand dollars for
30 recipients receiving an award in the two thousand nineteen--two thousand
31 twenty academic year and thereafter; and (e) complies with the applica-
32 ble provisions of this article and all requirements promulgated by the
33 corporation for the administration of the program. Adjusted gross income
34 shall be the total of the combined adjusted gross income of the appli-
35 cant and the applicant's parents or the applicant and the applicant's
36 spouse, if married. Qualifying year shall be the adjusted gross income
37 as reported on the federal income tax return, or as otherwise obtained
38 by the corporation, for the calendar year coinciding with the tax year
39 established by the U.S. department of education to qualify applicants
40 for federal student financial aid programs authorized by Title IV of the
41 Higher Education Act of nineteen hundred sixty-five, as amended, for the
42 school year in which application for assistance is made. Provided,
43 however, if an applicant demonstrates to the corporation that there has
44 been a change in such applicant's adjusted gross income in the year(s)
45 subsequent to the qualifying year which would qualify such applicant for
46 an award, the corporation shall review and make a determination as to
47 whether such applicant meets the requirement set forth in paragraph (d)
48 of this subdivision based on such year. Provided, further that such
49 change was caused by the death, loss of employment of the applicant or
50 the applicant's parent, permanent and total physical or mental disabili-
51 ty, divorce, or separation by judicial decree or pursuant to an agree-
52 ment of separation which is filed with a court of competent jurisdiction
53 of any person whose income was required to be used to compute the appli-
54 cant's total adjusted gross income.

55 § 3. This act shall take effect immediately.