

CHANGE FORM 2009-2010

HESC
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This form is for changing information provided on your application for payment under the Tuition Assistance Program (TAP) or other grant, scholarship or fellowship program for the 2009-2010 academic year. It is also for adding new information. DO NOT use this form unless you have already submitted your 2009-2010 application for payment.

APPLICATION INFORMATION																			
You must complete your social security number and name exactly as on your original application, even if incorrect . Report corrected information below.								SOCIAL SECURITY NO.										CD	
								LAST NAME											
								FIRST NAME											
								MIDDLE INITIAL											

A. STUDENT INFORMATION

QUESTION	HESC USE	CHANGE TO	QUESTION	HESC USE	CHANGE TO
Social Security No.	001		NY State Resident	060	1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No
Date of Birth	045	(MMDDCCYY)	U.S. Citizenship or Alternate Requirement	065	1 <input type="checkbox"/> Citizen
Last Name	020				2 <input type="checkbox"/> Eligible Non-Citizen
First Name	021				3 <input type="checkbox"/> Not a Citizen or Eligible Non-Citizen
Middle Initial	022				
Street Address	025				
	026				
City	032				
State	035				
Zip Code	040				

B. STUDENT MARITAL DATA

QUESTION	HESC USE	CHANGE TO	HESC USE																	
Marital Status	050	1 <input type="checkbox"/> Single 2 <input type="checkbox"/> Married 3 <input type="checkbox"/> Sep/Divorced/Widow	135																	
Marital Status Date	051	Month Year																		
Spouse's SSN	055		400																	

C. TERMS OF ATTENDANCE

QUESTION	HESC USE	CHANGE TO	QUESTION	HESC USE	CHANGE TO
Summer 2009	100	School Code	Will you be enrolled in a HEOP, EOP, SEEK or CD Program?	120	1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No
	101	1 <input type="checkbox"/> Undergraduate 2 <input type="checkbox"/> Graduate 3 <input type="checkbox"/> 2-yr Undergraduate			
Fall 2009	105	School Code	Will you be enrolled in an approved 5-year bachelor's degree program?	125	1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No
	106	1 <input type="checkbox"/> Undergraduate 2 <input type="checkbox"/> Graduate 3 <input type="checkbox"/> 2-yr Undergraduate			
Winter 2009-10	110	School Code	Requesting TAP?	012	0 <input type="checkbox"/> Yes 1 <input type="checkbox"/> No
	111	1 <input type="checkbox"/> Undergraduate 2 <input type="checkbox"/> Graduate 3 <input type="checkbox"/> 2-yr Undergraduate			
Spring 2010	115	School Code			
	116	1 <input type="checkbox"/> Undergraduate 2 <input type="checkbox"/> Graduate 3 <input type="checkbox"/> 2-yr Undergraduate			

D. PROGRAM OF STUDY

E. FINANCIAL INDEPENDENCE

QUESTION	HESC USE	CHANGE TO	QUESTION	HESC USE	CHANGE TO
Did you or will you live in an apartment, house or building owned or leased by your parents for more than 6 weeks during:	250	2008? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No	I was honorably discharged from the armed forces of the U.S.	240	1 <input type="checkbox"/> Yes NOTE: Attach photocopy of your DD214.
	255	2009? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No			
	260	2010? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No			
Were you or will you be claimed as a dependent on your parents' federal or state tax return for:	280	2008? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No	Withdrawal of claim of financial independence	007	Check this box <input type="checkbox"/> and complete Section G, Parents' Income Data, on the reverse.
	285	2009? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No			
Did you or will you receive gifts, loans or other financial assistance worth more than \$750 from your parents during:	265	2008? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No	Other Educational Aid (if different from amount previously reported)	130	\$ <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> .00 If none, enter zero.
	270	2009? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No			
	275	2010? 1 <input type="checkbox"/> Yes 2 <input type="checkbox"/> No			



David A. Paterson, Governor



CHANGE FORM 2009-2010

GENERAL INSTRUCTIONS

Do not use this form unless you have already submitted an appropriate application requesting payment under the Tuition Assistance Program (TAP), or other grant, scholarship or fellowship program for the 2009-2010 academic year.

If you have received any other request for information from the Higher Education Services Corporation (HESC), be sure to complete and return the form sent. Do not use a Change Form as a substitute unless you are asked to do so.

Your Change Form must be postmarked by May 1, 2010 or within 45 days following receipt of a request for information from HESC, whichever is later.

INSTRUCTIONS FOR COMPLETING CHANGE FORM

Enter only the information you want to change. If an item does not require a change, make no entry. You must sign the Affirmation.

Application Information

You must complete your social security number and name exactly as on your original application, 2009-2010 Award Certificate or any other document from HESC, even if incorrect.

A. Student Information

Enter any personal data that has changed from your application. If you are changing your social security number, attach a photocopy of your social security card.

B. Student Marital Data

If married, check box 2 and enter spouse's social security number and month and year of marriage. If single and never married, check box 1. If divorced or widowed, check box 3 and give date of divorce or spouse's death. If separated, check box 3 and give the month and year of separation.

C. Terms of Attendance

Complete all the items even if only one is a change. For each term in the 2009-2010 academic year, enter all the information requested, even if you reported it before. Contact your school's financial aid office for the correct HESC School Code to enter. For any term you are not going to school, enter 4 zeroes in the School Code boxes. If you had registered at a school and now wish to change the school code, be sure that you have withdrawn in accordance with the school's established policy.

D. Program of Study

Complete all changes.

E. Financial Independence

You can apply for or withdraw a claim of financial independence.

If withdrawing a claim, check the appropriate box and complete Section G - PARENTS' INCOME DATA and the Affirmation.

If applying for financial independence, answer the questions relating to residence with your parents, being claimed by them as a dependent on their income tax returns, and receiving financial assistance from them. If you are under 22 years of age as of June 30, 2009, and meet the basic conditions of financial independence, you will be required to provide official documentation such as court orders, evidence from social service officials, or sworn statements needed to verify one of the special conditions described below.

- YOUR PARENTS are deceased, totally and permanently disabled, or have been declared incompetent by judicial action.
- YOU are a ward of the court. Ward of the court does not include status as an inmate.
- YOU are receiving public assistance. Public assistance does not include food stamps, unemployment insurance, or aid as a dependent child under the Aid to Families with Dependent Children (AFDC) program.
- YOU have been rendered financially independent due to the involuntary dissolution of your family resulting in relinquishment of your parents' responsibility and control.

F. & G. Applicant/Spouse 2008 Income Data and Parents' 2008 Income Data

- Check box 1 if no state or federal income tax return was filed.
- Check box 2 if NYS IT-150 or a IT-201 was filed. Enter exemptions from line 23 of NYS IT-150; enter **the sum of** NYS taxable income from line 25 and Pensions of NYS and local governments and the federal government from line 16. Enter exemptions from line 36 of NYS IT-201; enter **the sum of** NYS taxable income from line 37 and Pensions of NYS and local governments and the federal government from line 26.
- Check box 3 if a federal return was filed but a New York State return was not.
 - Form 1040: Enter exemptions from line 6d and gross income from line 37.
 - Form 1040A: Enter exemptions from line 6d and gross income from line 21.
 - Form 1040EZ: Enter "0" for exemptions and gross income from line 4.

H. Exclusion or Adjustment of Parent Income

The amount of income used in the award calculation may be adjusted if the parents are deceased, were never married, are separated or divorced, or are disabled. In the following instructions: "custodial" refers to the parent with whom you live, who exercises custody if you are a minor, or who would exercise custody if you were a minor; "non-custodial" refers to the parent whose income you are requesting be adjusted.

Deceased - If one or both of your parents are deceased, check the appropriate box "1" and indicate the month and year. If the death occurred on or before December 31, 2008, do not report the deceased parent's income in Section G. If the death occurred on or after January 1, 2009, all parental income must be reported in Section G; however, only a portion of the deceased parent's income will be used in the award calculation.

Separated/Divorced - If your parents are separated or divorced, check the appropriate box "2" for the non-custodial parent and enter the month and year it occurred. If separation preceded divorce, enter the month and year the separation occurred. If the separation/divorce occurred on or before December 31, 2008, report the custodial parent's income in Section G and the amount of support received on your behalf during 2008 from the non-custodial parent in Section H. If no support was received, enter "0". If the separation/divorce occurred on or after January 1, 2009, income information for both parents must be reported; however, only a portion of the non-custodial parent's income will be used in the award calculation.

Disabled after December 31, 2008 - If one or both of your parents have become permanently disabled since December 31, 2008 check the appropriate box "3" and indicate the month and year. Income information for the disabled parent must be reported in Section G, but only a portion of it will be used in the award calculation.

Never Married - If your parents were never married, check the appropriate box "4" and report income information for the custodial parent in Section G.

Stepparents - If the surviving/custodial parent married before January 1, 2009, you must also report income information for the stepparent. Enter that information in Section G. If you are reporting both a stepparent's income and non-custodial parent's support, enter the stepparent's income in Section G and the support amount in "Support Amount" boxes in Section H. Enter the stepparent's social security number in the Affirmation area.

I. Adjustment for Other Family Members Attending College

This adjustment reduces the amount used in the award calculation and may result in an increase in the amount of award. To claim the adjustment, you must report the name, social security number, and relationship to you of all other family members who will be full-time matriculated students attending a college or other post-secondary school for at least one term of the 2009-10 academic year. Do not list yourself, anyone who is enrolled in an elementary or secondary school, or anyone who is not matriculated on a full-time basis. (NOTE: If you are a dependent student, you may only claim the adjustment for other family members who are also dependent upon your parents. If you are an independent student, you may only claim your spouse and/or your dependent children.)

RELATIONSHIP CODES:

1=brother/stepbrother; sister/stepsister; 2=spouse;
3=parent/stepparent; 4=child/stepchild; 5=other.

J. Schedule Adjustment for Single Independent Students

This adjustment affects the award schedule under which your TAP Award will be calculated. To apply for this adjustment, you must check the appropriate box and provide necessary documentation.

AFFIRMATION - Who must sign?

- The applicant - always.
- If married, the applicant's spouse.
- Parent(s) - only if reporting or changing parent(s)' income. Social security number and first three letters of parent(s)' last name(s) must also be entered.