

# APTS

## NEW YORK STATE'S PROGRAM OF AID FOR PART-TIME STUDY

2012 - 2013

### INSTRUCTIONS FOR PREPARING AN APPLICATION FOR AID FOR PART-TIME STUDY

**WHAT IS APTS?** The Aid for Part-Time Study program is a grant program financed by New York state in conjunction with participating educational institutions throughout the state. The program provides up to \$2,000 per year to help part-time undergraduate students meet their educational expenses.

**WHO IS ELIGIBLE FOR APTS?** To be considered for an award a student must:

- submit APTS application to the Financial Aid office by April 1, 2012 in addition to applicable 2011 state tax documents
- be working toward an undergraduate degree or enrolled in a registered certificate program as a part-time student registered for at least 3 credits but fewer than 12 credits per semester
- maintain good academic standing including having achieved at least a cumulative "C" average after having received the equivalent of two full years of payment of state-sponsored student financial aid
- be a legal resident of New York state
- be a U.S. citizen or eligible noncitizen
- meet the income limits (see below)
- not have exhausted Tuition Assistance Program (TAP) eligibility
- not be in default on a federal or state student loan or on any repayment of state awards.
- have graduated from a high school in the United States or have earned a United States GED.

**WHAT ARE THE INCOME LIMITS?** Income means the net taxable income plus any state, local or federal pension and any private pension and annuity income.

- If you were claimed as a tax dependent by your parents, family income (i.e., income of student and parents) cannot exceed \$50,550.
- If you were not eligible to be claimed as a tax dependent by your parents, income (i.e., income of student and/or spouse, if married as of Dec. 31) cannot exceed \$34,250.
- If you were not eligible to be claimed as a tax dependent by your parents but you were eligible to claim dependents of your own other than yourself and/or your spouse, income (i.e., income of student and spouse) cannot exceed \$50,550.

**HOW DOES A STUDENT APPLY FOR AID FOR PART-TIME STUDY?** Complete the application using these instructions. Mail or fax the completed application to SUNY Empire State College, Financial Aid, 111 West Ave., Saratoga Springs, NY 12866-6069, fax 518-581-2782. Do not return the application to Higher Education Services Corp. **IMPORTANT: if you and/or your spouse (and parents if dependent) filed a 2011 New York state income tax return, you MUST submit a signed copy of the NYS tax return with this application to be considered for an APTS award.** Read the instructions before making any entries. If you need further help, or if you need clarification of a particular issue, contact the Financial Aid officer.

**SOCIAL SECURITY NUMBER, DATE OF BIRTH, NAME, ADDRESS.** Enter all the information requested.

#### 1. NEW YORK STATE RESIDENT

- Check "Yes" if any of the following apply to you ...
  - you now reside in New York state **and** will be an undergraduate **and** you lived in New York state for the last two terms of high school, or
  - you were a legal resident when you entered military service, Vista or Peace Corps **and** re-established New York state residency within six months after release from service, or
  - you have resided in New York state for at least 12 months immediately preceding the first term for which you are seeking aid **and** have an established domicile (permanent residence) in New York state.
- Check "No" if ...
  - you are financially dependent on your parents and neither of them is a New York state resident, or
  - your parents are separated or divorced and the parent with whom you are living is not a New York state resident, or
  - you reside in New York state for the sole purpose of attending college, or
  - none of the above conditions apply to you.
- If you (or your spouse if married, or parent(s) if dependent) are a member of the armed forces and stationed on full-time active duty in New York state, residency requirements may be waived by submitting official documentation confirming full-time active duty status and duty station.

**2. UNITED STATES CITIZENSHIP OR ALTERNATE REQUIREMENTS.** Check the box that applies to you. You must check one of the three boxes. Proof of your status may be required.

- 3-4. MARITAL STATUS.** Check the box that applies to you. If you were married as of Dec. 31, you must report income information for your spouse in question 7. Enter the month and year you were married or, if separated/divorced or widowed, give earliest date on which you were separated/divorced or widowed. If you are other than **single**, enter your spouse's Social Security number in the affirmation section. (**Note:** Any separation must be by judicial decree or pursuant to an agreement which is filed by a court of competent jurisdiction.)
- 5. CHECK "YES"** if you have graduated or will graduate from a U.S. high school or if you received or will receive a General Education Development (GED) certificate. You also may check "**Yes**" if you received a passing score on a federally approved examination which demonstrates your ability to benefit from the education being offered. Otherwise, check "**No.**"
- 6. EMPLOYER REIMBURSEMENT.** Awards under this program are limited by the actual tuition paid by the student. In considering a student for an award, the institution must take into account other sources of financial aid available.
- Check "**Yes**" if your employer or other third-party source has paid, or will reimburse, all or part of your tuition for the term(s) for which the application for APTS is made, and enter amount of reimbursement, if known.
  - Otherwise, check "**No.**"
- 7.** Enter your New York state net taxable income (NTI) in the boxes provided.
- 8. WERE YOU CLAIMED AS A TAX DEPENDENT?**
- Check "**Yes**" and report your parents' income on page 2 of the application if you were claimed as a dependent by your parents' tax return.
  - Check "**No**" and sign the affirmation on page 2 of the application if you were not eligible to be claimed as a dependent by your parents. (If married, your spouse must also sign the application.) If you have checked **no** but have dependents of your own other than your spouse, also check the second box as indicated.
- Note:** If you were not claimed as a tax dependent on your parents' tax return, you must still report your parents' income in question 10 if you could have been claimed but were not. The criteria for determining whether or not you could have been claimed are detailed in the instruction booklet for filing state and federal tax returns. Generally, you were eligible to be claimed as a dependent if:
- you were single, and
  - your parent or parents provided more than one-half of your support in the previous year, and
  - your gross income was less than \$2,900. If your income was more than \$2,900, you could still have been claimed if you were under 19 years of age or you were under 24 years of age and a full-time student.
- 9. EXCLUSION OF PARENTS' INCOME.** Report in question 10 the income of the parent with whom you lived most last year or who had custody or would have had custody if you were a minor.
- The income of a parent can be excluded in the cases of death, divorce or separation which occurred before Dec. 31. You should check the appropriate box in question 9 and enter the date and amount of support received on your behalf. (**Note:** Any separation must be by judicial decree or pursuant to an agreement of separation which is filed by a court of competent jurisdiction.)
- 10. PARENTS' INCOME.** The instructions for reporting income information are the same as appear in question 7. Report the following incomes: father's (stepfather's, adoptive father's) income and mother's (stepmother's, adoptive mother's) income. If you excluded the income of one parent in question 9, report the income of the other parent in question 10. In addition, enter Social Security numbers as appropriate in the **Affirmation** section.

**AFFIRMATION.** You **must** sign the application. In addition, if you are married, your spouse must sign and give his/her Social Security number. If your parents were required to provide income information in question 10, they must sign and give their Social Security numbers and the first three letters of their last name.

In signing this **Affirmation** you are acknowledging that you have read, understand and accepted the conditions described in the **Affirmation** appearing on the application form.

#### DISCLOSURE OF SOCIAL SECURITY NUMBERS

Disclosure of your Social Security number and the Social Security numbers of members of your family is mandatory and has been authorized by NYS Education Law 661 subdivision (2).

We need these numbers to verify your identity, to process your application, to keep track of your records and to verify reported incomes from the New York State Department of Taxation and Finance.

#### NO DISCRIMINATION ON THE BASIS OF DISABILITY

We do not discriminate against handicapped persons in our employment practices or in the administration of our programs, activities or services.