Primary Tuition Scholarship Checklist: NYC Private Schools

☐ Confirm eligibility: Go to humanresources.columbia.edu; click CUBES; log in with UNI and password; click “Tuition”
  ▪ If you are eligible, under “Outside of Columbia University” click “Primary Tuition Scholarship - For Dependent Children”.
  ▪ If both parents of an enrolled child were hired or appointed as regular, full-time Officers on or before July 1, 2011, with no break in service, the child may receive two PTS scholarships up to a maximum of 70% tuition.
  ▪ If you are not eligible and have questions, contact the Columbia Benefits Service Center at hrbenefits@columbia.edu or 212-851-7000, Monday through Friday, 9:00 a.m. – 4:00 p.m.

☐ Gather required documentation
  ▪ Full, itemized tuition bill from school; include school email and payment mailing address.
  ▪ Prior year, federal tax returns for child’s family (see Worksheet on page 2).
    ― If you do not submit tax information, your PTS award will equal 10% of tuition.
  ▪ Grants and/or scholarship documentation for aid child is receiving.

☐ Fill in the Primary Tuition Scholarship (PTS) – Eligibility & Application Form
  ▪ The form is now fillable so you can complete online.
  ▪ Each Officer must submit one PTS application for each dependent child (one form per child; two forms per child if both parents of an enrolled child are eligible; fill in “Second Officer” with the other parent’s name and UNI).
  ▪ If a child is not listed on this form, he or she must be added as a dependent. Go to CUBES Profile; select “Profile” then “My Dependents” then “Add Dependent”; fill in fields. Scan and upload proof of relationship using the "Upload Documentation" link. Once documentation is verified and your record is updated, you may complete form.
  ▪ Confirm Officer contact information. If a phone number or email address is not listed, please add.

☐ Determine Qualifying Family Income and percent of tuition covered (see Worksheet on page 2).
  ○ EBPA will confirm all calculations.

☐ Certify and sign application. It is important to read certifications one through five; then, sign and date.

☐ Submit application to EBPA after June 1 for the start of a new primary school year.
  ▪ Go to secure.ebpabenefits.com; click “Reimbursement Accounts”; enter information; upload documents; or
  ▪ Send via fax: 603-773-4425; or
  ▪ Send via mail: EBPA, P.O. Box 1140, Exeter, NH 03833-1140.
    For application status and payment processing questions, email EBPA at tuition@ebpabenefits.com or call EBPA customer service: 1-888-456-4576.

PTS application processing begins after all required information is received and will take up to 15 business days to complete. If an application is submitted with incomplete information or without required documentation, EBPA will send an email identifying what’s missing. The application will not be processed—and no payment will be made—until the Officer provides the missing information and/or documentation. EBPA will confirm the PTS benefit amount and payment to the school, by U.S. mail.

Related Links: Primary Tuition Scholarship Policy; FAQs: Tuition Programs then click “Primary Tuition Scholarship (PTS)”
PTS Financial Information Worksheet

To apply for PTS awards greater than 10% of tuition, tax returns are used to determine Qualifying Family Income (Taxable Income minus Total Tax). Qualifying Family Income is compared against the PTS Percent of Tuition Covered Table (below) income levels to determine percentage of tuition covered, from 10% to 35%.

- If you do not claim this child as a dependent, submit the tax returns of the person who does and add that person’s income to yours.
- If the child receives the benefit through two parents who file separately, both incomes count.
- Use the result to find the percentage of tuition the benefit will cover, as indicated in the table below.

Qualifying Family Income

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
<th>Column 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Columbia Officer</td>
<td>Second Columbia Officer (If he/she files separately)</td>
<td>Person Claiming Child as a Dependent (if not you)</td>
<td>Family (Columns 1+2+3)</td>
</tr>
</tbody>
</table>

Line A
“Taxable Income” from Federal Income Tax Return*

Line B
“Total Tax” from Federal Income Tax Return**

Eligible Income
Line A minus Line B

<table>
<thead>
<tr>
<th>Line A</th>
<th>Line B</th>
<th>Eligible Income</th>
<th>Qualifying Family Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

* “Taxable Income” = Line 10 on 2018 Form 1040
** “Total Tax” = Line 15 on 2018 Form 1040

PTS Percent of Tuition Covered Table

<table>
<thead>
<tr>
<th>Qualifying Family Income</th>
<th>Percent of Tuition Covered</th>
</tr>
</thead>
<tbody>
<tr>
<td>$35,000 or below</td>
<td>35%</td>
</tr>
<tr>
<td>$35,001-39,999</td>
<td>30%</td>
</tr>
<tr>
<td>$40,000-49,999</td>
<td>25%</td>
</tr>
<tr>
<td>$50,000-54,499</td>
<td>20%</td>
</tr>
<tr>
<td>$55,000-59,999</td>
<td>15%</td>
</tr>
<tr>
<td>$60,000 and over</td>
<td>10%</td>
</tr>
</tbody>
</table>

Please record your Qualifying Family Income in the spaces above to estimate the percent of tuition covered and determine Qualifying Family Income and PTS Coverage for the Primary Tuition Scholarship (PTS) – Eligibility & Application Form. EBPA will confirm all calculations.

If you have questions, call the Columbia Benefits Service Center: 212-851-7000 or email hrbenefits@columbia.edu, Subject: PTS – NYC Private Schools; Monday through Friday, 9:00 a.m. – 4:00 p.m.