

Primary Tuition Scholarship – NYC Private Schools - Application For Eligible Retired Officers of the University and their Dependent Children

Primary Tuition Scholarship – Application Form

The Primary Tuition Scholarship (“PTS”) program pays between 10% and 35% of your dependent child’s tuition in grades K - 8 at a private school within the five boroughs of New York City, based on Total Eligible Family Income. Both you and the child must live within the five boroughs of New York City. See the PTS Policy for details of eligibility, how the benefit works and the application procedure.

You can submit an application no earlier than June 1 for the start of a new primary school year.

Related Links below:

[PTS Checklist & Financial Information Worksheet](#)

[PTS Policy](#)

[PTS FAQs](#)

Retired Officer Contact Information

Using the [PTS Checklist & Financial Information Worksheet](#) please complete all fields that apply, sign and attach this form as part of your required documentation to be submitted to EBPA.

Retired Officer Information:

Date of Birth: ____ / ____ / ____ UNI: _____ Email: _____
Last Name: _____ First Name: _____ Address: _____

Apt. ____ City, State, ZIP: _____
Email: _____
Primary Contact Phone: (____) ____ - ____ Work Phone: (____) ____ - ____

Click here if there is a Second Officer. Both parents must have been hired or appointed as regular, full-time Officers on or before July 1, 2011, without a break in service, to be eligible for a second Primary Tuition Scholarship. Both Officers must submit separate PTS Eligibility and Application forms.

Eligible Dependent Information

I understand I must submit one (1) Primary Tuition Scholarship - Application Form for each dependent child.

I am applying for Primary Tuition Scholarship for the following eligible dependent child.

Dependent Child Last Name: _____ First Name: _____ Date of Birth: ____ / ____ / ____

Primary School & Billing Information

Using the [PTS Checklist & Financial Information Worksheet](#), please complete all fields that apply, sign and attach this form as part of your required documentation to be submitted to EBPA.

Year _____ Grade: K 1 2 3 4 5 6 7 8

School Name: _____

Address: _____

City, State, ZIP: _____

Billing Contact Information: _____

Billing Contact Email Address: _____

Phone #: _____ Fax: _____

Tuition Billed Amount: \$ _____ Grants and/or Scholarships: \$ _____

(Attach copy of full itemized Tuition Bill)

(Attach copies of official documentation)

Financial Information to Determine Total Eligible Family Income and PTS Coverage

To apply for PTS coverage above 10%, you must submit your prior year tax returns of the child's family, which will be used to determine the Total Eligible Family Income and the Percentage of Tuition Covered.

Complete this section and attach copies of your prior years federal, state and city tax returns (and that of the person who claims the child as a dependent if you do not). Please use the PTS Checklist and Financial Information Worksheet as a guide to calculate your child's Total Eligible Family Income. EBPA will confirm all calculations. *(Please check appropriate box)*

I do not wish to submit tax forms. I understand the PTS benefit I shall receive will be equal to 10% of the school's tuition.

I wish to submit tax forms. I have included copies of prior year's federal, state and city tax returns for the child's family. I have used the [PTS Checklist and Financial Information Worksheet](#) a guide to determine Total Eligible Family Income to determine Percentage of Tuition Covered.

Total Eligible Family Income \$ _____ Percent of Tuition Covered % _____

Certification and Signature

I certify that:

1. All the information on this form is true and accurate to the best of my knowledge.
2. I understand the Primary Tuition Scholarship is for grades K-8 only.
3. I understand I must submit one (1) Primary Tuition Scholarship Application form for each dependent child.
4. I have reviewed and understand the Primary Tuition Scholarship Policy, and my dependent is eligible for the tuition benefit for which I am applying.
5. By signing this form, I acknowledge my liability to return a pro-rated portion of this benefit upon my resignation, discharge or release from employment at Columbia University during the primary school year my dependent child is using this benefit.

Parent's Signature: _____ Date (mm/dd/yy) _____

Instructions to Submit Your Application to EBPA

The following required printed documentation must be completed and submitted to EBPA as part of your Primary Tuition Scholarship Benefit application. Applications without the required documentation will not be processed until all required information is received.

- Attach this form (“Primary Tuition Scholarship (PTS) - Application Form, Eligible Retired Officers”).
- Full Itemized Tuition Bill, **which must include payment mailing address.**
- Official documentation for any scholarship, grants, and/or awards your child is receiving
- Prior Year Tax Returns, copies of prior year’s federal, state and city tax returns for the child’s family (if applicable) and the Financial Information Worksheet

Please submit your documentation to EBPA as soon as possible to ensure timely payment for the upcoming school year, via one of the following options:

- **Secure Document Portal:** <https://secure.ebpabenefits.com>
- **Fax:** 603-773-4425
- **Mail:** EBPA, P.O. Box 1140, Exeter, NH 03833-1140

Primary Tuition Scholarship - Checklist

For Eligible Retired Officers of the University and their Dependent Children

The following documentation must be completed and submitted to EBPA as part of your application for the Primary Tuition Scholarship (PTS) benefit. *PTS applications without the required documentation will not be processed* until all required information is received. This documentation must be submitted each term.

Required documentation for your application includes:

- **Primary Tuition Scholarship (PTS) Benefit - Application Form**
Retired Officers
- **Full Itemized Tuition Bill** –from the school your child attends, along with the school's payment mailing address information
- **Financial Information** – attach copies of prior year's federal, state, and city tax returns for the child's family (if applicable)

Steps to Complete Your Application:

1. **Fill out the Primary Tuition Scholarship (PTS) Benefit - Application Form**, for *Retired Officers*. You must submit one (1) Form for each child. You must complete each section:
 - **Columbia Retired Officer Information**
 - Date of Birth
 - UNI
 - Email address
 - Last name, First Name
 - Address and Apartment Number
 - City, State, Zip
 - Primary Contact Phone Number and Work Phone Number
 - **Columbia Second Officer Confirmation** (Check Box, if applicable)
 - **Eligible Dependent Child Information**
 - I am applying for Primary Tuition Scholarship for the following eligible dependent child.
 - Last name, First Name
 - Date of Birth
 - **Primary School & Billing Information**
 - Year and Grade: K, 1, 2, 3, 4, 5, 6, 7, 8
 - School name, Address, City, State, ZIP Code (within the five boroughs of New York City)
 - Billing Contact and email address information for school
 - Phone number and Fax information
 - Tuition Billed Amount \$ - attach copies of full itemized Tuition Bill
 - Grants and/or Awards Amounts \$ - attach copies of official documentation
2. **Attach the Full Itemized Tuition Bill** –from your child's school, which must include the primary school's payment mailing address information.
3. **Financial Information to Determine Total Eligible Family Income and PTS Coverage:** To apply for PTS Percentages of Tuition Covered above 10%, you must submit the prior year's federal, state and city income tax returns of the child's family, which are used to determine the "Total Eligible Family Income." If you do not claim this child as a dependent, you are required to provide the tax return(s) of the person who does. (See Page 3 of this document, the *PTS Financial Information Worksheet*).

Total Eligible Family Income Formula:

$$\text{Taxable Income} - \text{Total Tax} = \text{Total Eligible Family Income}$$

The dollar value of the Total Eligible Family Income is then compared against the PTS Percent of Tuition Covered Table income levels to determine the Percentage of Tuition Covered, from 10% to 35%.

If you do not wish to submit tax information, your PTS award will equal 10% of the school's tuition.

Certification and Signature: Please read certifications 1 through 5 and sign and date your PTS Application

Instructions to Submit Your Application to EBPA

Complete the above steps and then submit documentation to EBPA as part of your application for the Primary Tuition Scholarship (PTS) Benefit.

Submit your application to EBPA via one of the following options:

- **Secure Document Portal:** <https://secure.ebpabenefits.com>
- **Fax:** 603-773-4425
- **By Mail:** EBPA, P.O. Box 1140, Exeter, NH 03833-1140

For application status and payment processing questions, please email EBPA at tuition@ebpabenefits.com or call EBPA Customer Service at 1-888-456-4576.

If Your Application is Missing Required Documentation – Your PTS application will not be processed until all required information is received. EBPA will send an email identifying the missing information. ***If you do not respond, the application will not be processed for payment.***

PTS Payment Notification – EBPA will notify you by mail to confirm the PTS Benefit amount and payment to the educational institution.

Questions: If you have any questions about these required forms or documentation, please call the Columbia Benefits Service Center at 212-851-7000 or email hrbenefits@columbia.edu, Subject: "PTS Question(s)."

PTS Financial Information Worksheet

Calculate your family's total eligible income: If the child receives the benefit through two parents who file separately, both incomes count; likewise, if you are not the person claiming the child as a dependent, that person's income should be added to yours. Use the result to find the amount of the child's tuition that the benefit will cover, as indicated in the table below.

Eligible Family Income

	Column 1 <i>First Columbia Officer</i>	Column 2 <i>Second Columbia Officer (If he/she files separately)</i>	Column 3 <i>Person Claiming Child as a Dependent (If Not You)</i>	Column 4 <i>Family (Columns 1+2+3)</i>
Line A <i>"Taxable Income" from Federal Income Tax Return*</i>	\$ _____	\$ _____	\$ _____	\$ _____
Line B <i>"Total Tax" from Federal Income Tax Return**</i>	\$ _____	\$ _____	\$ _____	\$ _____
Eligible Income <i>Line A minus Line B</i>	\$ _____	\$ _____	\$ _____	\$ _____
				Total Eligible Family Income

* "Taxable Income" = Line 10 on 2018 Form 1040

** "Total Tax" = Line 15 on 2018 Form 1040

PTS Coverage

Eligible Family Income	Percent of Tuition Covered
35,000 or below	35%
35,001-39,999	30%
40,000-49,999	25%
50,000-54,499	20%
55,000-59,999	15%
60,000 and over	10%

Please record your family's **Total Eligible Family Income** and the **Percent of Tuition Covered** in the spaces provided at the bottom of the **Financial Information to Determine Total Eligibility Family Income and PTS Coverage** section on the *Primary Tuition Scholarship (PTS) – Eligibility & Application Form*. EBPA will confirm all calculations.

If you have a question about submitting an application, or need to follow up on a claim, please call EBPA: 1-888-456-4576.