


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 - NYC Private School.”
 - 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 fillable, so you can complete it online.
 - 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**, they must be added as a dependent. Go to CUBES Profile; click on the drop-down button next to your name, 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 the form.
 - Confirm Officer contact information. If a phone number or email address is not listed, please add it.

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

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

- **Submit the application to EBPA** after June 1 for the start of a new primary school year.
 - ***New Document Submission Portal*** *To access and submit your tuition scholarship, please visit the [EBPA Secure Submission portal](#). Once this page has loaded, click Tuition Accounts, enter your information and upload the necessary documents and click SUBMIT, 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, contact EBPA at ebpabenefits.com/contact-us or 1-888- 456-4576.

EBPA will review the application within 2-3 business days to confirm completeness prior to processing. PTS application processing begins after all required documentation is received and will take up to 15 business days.

If an application is incomplete or missing 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.

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 the 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

	Column 1 First Columbia Officer	Column 2 Second Columbia Officer (if they file separately)	Column 3 Person claiming child as a dependent (if not you)	Column 4 Family (columns 1+2+3)
Line A: Taxable income from Line 15 of 2021 Form 1040	\$	\$	\$	\$
Line B: Total tax from Line 24 of 2021 Form 1040	\$	\$	\$	\$
Eligible Income: Line A minus Line B	\$	\$	\$	\$

PTS Percent of Tuition Covered Table

Qualifying 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 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.