

**Primary Tuition Scholarship – NYC Private Schools – Application Form**  
*For eligible retired officers of the University and their dependent children*

The Primary Tuition Scholarship (PTS) program pays between 10% and 35% of the dependent child's tuition in grades K-8 at a private school within the five boroughs of New York City, based on Qualifying Family Income. Both you and the child must live within the five boroughs. Please review 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:** [PTS Policy](#) [PTS Website](#)

**Retired Officer Contact Information**

Using the PTS Checklist and Financial Information Worksheet included in this document, please complete all fields that apply. Sign and attach this form as part of your required documentation to submit to EBPA.

**Retired Officer Information:**

Date of Birth: \_\_\_\_\_ UNI: \_\_\_\_\_

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Address: \_\_\_\_\_ Apt: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Primary 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.

Second Officer Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ UNI: \_\_\_\_\_

**Eligible Dependent Information:**

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

Date of Birth: \_\_\_\_\_

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

Note: Under current IRS regulations, a Primary Tuition Scholarship counts as taxable income when it benefits the dependent child of a Same-Sex Domestic Partner (SSDP).

**Primary School and Billing Information**

Using the PTS Checklist and 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: 20\_\_\_\_\_ Grade: ☐ K ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8

School Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Billing Contact Information: \_\_\_\_\_

Billing Contact E-mail Address: \_\_\_\_\_

Billing Contact Phone: \_\_\_\_\_ Billing Contact Fax: \_\_\_\_\_

Tuition Billed Amount: \$\_\_\_\_\_ Grants and/or Scholarship Amount: \$\_\_\_\_\_  
(Attach a copy of the full itemized tuition bill) (Attach copies of the official documentation)

**Financial Information to determine Qualifying Family Income and PTS Coverage**

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

Complete this section and attach copies of your prior year's federal, state, and city tax returns (and that of the person who claims the child as a dependent if different). Please use the PTS Checklist and Financial Information Worksheet as a guide to calculate the Qualifying Family Income. EBPA will confirm all calculations. (Please check the appropriate box)

- ☐ I do not wish to submit tax forms. I understand the PTS benefit received will be equal to 10% of the school's tuition.
- ☐ I wish to submit tax forms. I have included copies of the prior year's federal, state, and city tax returns for the child's family. I have used the PTS Checklist and Financial Information Worksheet to calculate the Qualifying Family income to determine the percentage of tuition covered.

Qualifying Family Income: \$\_\_\_\_\_ Percent of Tuition Covered: %\_\_\_\_\_

**Certification and Signature**

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 that one (1) Primary Tuition Scholarship Application form must be submitted 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.

Retiree Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**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**

	<b>Column 1</b> First Columbia Officer	<b>Column 2</b> Second Columbia Officer (if they file separately)	<b>Column 3</b> Person claiming child as a dependent (if not you)	<b>Column 4</b> Family (columns 1+2+3)
<b>Line A:</b> Taxable income from Line 15 of 2022 Form 1040	\$	\$	\$	\$
<b>Line B:</b> Total tax from Line 24 of 2022 Form 1040	\$	\$	\$	\$
<b>Eligible Income:</b> Line A minus Line B	\$	\$	\$	\$

**PTS Percent of Tuition Covered Table**

<b>Qualifying Family Income</b>	<b>Percent of Tuition Covered</b>
\$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%

*Total Qualifying  
Family Income*

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](mailto:hrbenefits@columbia.edu), Subject: *PTS – NYC Private Schools*; Monday through Friday, 9:00 a.m. – 4:00 p.m.

**Instructions to Submit your Application to EBPA**

The following documents 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.

- The PTS Application form for retired officers (pages 1-2 of this document).
- Full itemized tuition bill, which must include the payment mailing address
- Official documentation for any scholarships, grants, and/or other awards the child is receiving
- Prior year tax returns—federal, state, and city—for you and the person who can claim the child as a dependent (if different)
- The financial information worksheet (page 3 of this document)

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:

- To access and submit your tuition scholarship, please visit the [EBPA Secure Document Submission Portal](#). *Once this page has loaded, click Tuition Accounts, enter your information and upload the necessary documents and click SUBMIT, or*
- Fax: (603) 773-4425
- Mail: EBPA, P.O. Box 1140, Exeter, NH 03833-1140
- [Register to track the status of your application with EBPA](#). Applications will be available for tracking 2-3 business days after they are submitted through the portal.

**Primary Tuition Scholarship Checklist: NYC Private Schools***For Retired Officers of the University and their Dependent Children*

- ☐ **Gather required documentation:**
  - Completed Primary Tuition Scholarship Benefit Application Form for Retired Officers
  - 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 3).
    - o 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.
  - Financial Information Worksheet
- ☐ **Complete the PTS Application Form for Retired Officers of the University and their Dependent Children:**
  - 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).
  - Complete each section of the application. All fields are required, and the application cannot be processed unless it is complete:
    - a. Retired officer information
    - b. Dependent information
- ☐ **Determine Qualifying Family Income and percent of tuition covered (see Worksheet on page 3).**
  - EBPA will confirm all calculations.
- ☐ **Certify and sign the application.** It is important to read certifications one through four; then, sign and date the form.
- ☐ **Submit application to EBPA** after June 1 for the start of a new primary school year.
  - To access and submit your tuition scholarship, please visit the [EBPA Secure Document 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.
  - [Register to track the status of your application with EBPA](#). Applications will be available for tracking 2-3 business days after they are submitted through the portal.

For application status and payment processing questions, contact EBPA at [ebpabenefits.com/contact-us](http://ebpabenefits.com/contact-us) or 1-888-456-4576.

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 is 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.

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