COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK

Primary Tuition Scholarship Checklist: NYC Private Schools

□ **Gather required documentation**
Helpful tips: Please make sure you have digital copies of all the required documentation. Additionally, give yourself enough time to complete your application(s) because you cannot save your progress and continue at a later time.

- **Full, itemized tuition bill or school contract** from school; include school email and payment mailing address.
- **Prior year, federal tax returns** for the 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 the child is receiving.

□ **Fill in the Primary Tuition Scholarship (PTS) – Eligibility & Application Form: Go to humanresources.columbia.edu; click CUBES; log in with UNI and password; click "Tuition"**

- 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).
  1. Complete – Eligible Dependent Information & Primary School Information
  2. Itemized Tuition Bill/School Contract, confirm required information
  3. Upload Required Documentation to EBPA Secure Submission Portal. *Document Submission Portal, 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, upload the necessary documents, and click SUBMIT*- **Save the EBPA Transaction Confirmation Number - Required to submit the PTS application**
  4. Enter EBPA Transaction Confirmation Number
  5. Complete - I Certify and Electronically Sign the Application - **It is important to read sections one through six, then sign and date.**
  6. "Submit" your PTS application to EBPA.

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

□ **Submit the application to EBPA** after June 1 for the start of a new primary school year.

- 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 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's missing. The application will not be processed—and no payment will be made—until the Officer provides the missing information and/or documentation. Your application will be in a *"Pending"* status until all the requested information is received. Please respond and provide the missing information as quickly as possible! EBPA will confirm the PTS benefit amount and payment to the school by U.S. mail.

Related Links: Primary Tuition Scholarship Policy; Primary Tuition Scholarship website

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 the 2025 Form 1040	$	$	$	$
Line B: Total tax from Line 24 of 2025 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.