



# Primary Tuition Scholarship (PTS) Application

For parents and students who reside and attend K-8 school within the five boroughs of New York City

## Instructions

Please complete and return this form as soon as possible to ensure timely payment for the upcoming term. You are required to fill in all fields that apply. You must attach a copy of the itemized bill from the school for this year, as well as your completed **Tuition Benefits Eligibility Form** available when you log on to the CU Benefits Enrollment System at [www.hr.columbia.edu/benefits](http://www.hr.columbia.edu/benefits). Attach a copy of your last year's federal, state, and city tax returns (and those of the person who claims the recipient as a dependent, if you do not). *Otherwise, you will receive a PTS equal to 10% of the school's tuition.* If this is a first-time application for this dependent, also attach a proof of your relationship (see *Primary Tuition Scholarship Program* page or booklet for details). **Please return the form by June 30 each year you apply to: EBPA, PO Box 1140, Exeter, NH 03833-1140. For questions, please call: 1-888-456-4576.**

## Columbia Officer Information

Date of Birth \_\_\_ / \_\_\_ / \_\_\_ UNI: \_\_\_\_\_  
Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Apt. #: \_\_\_\_\_  
City, State, ZIP: \_\_\_\_\_  
Home Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_ Work Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

## Second Columbia Officer Information

**Both parents must be hired or appointed as full-time officers on or before July 1, 2011 to be eligible for a second PTS benefit**

Date of Birth \_\_\_ / \_\_\_ / \_\_\_ UNI: \_\_\_\_\_  
Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Apt. #: \_\_\_\_\_  
City, State, ZIP: \_\_\_\_\_ E-mail: \_\_\_\_\_  
Home Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_ Work Phone: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_

## Student Information

Date of Birth: \_\_\_ / \_\_\_ / \_\_\_ Grade Level:  K  1  2  3  4  5  6  7  8  
Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

## School Registrar or Financial Services Information

School Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_  
Address 1: \_\_\_\_\_  
Address 2: \_\_\_\_\_ City, State, ZIP: \_\_\_\_\_  
E-mail: \_\_\_\_\_ Ph: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_  
Term Tuition Amount (Attach copy of itemized bill): \$ \_\_\_\_\_ Other Scholarships (Attach documents): \$ \_\_\_\_\_

## Financial Information

**Not required if you are applying for PTS at the School at Columbia University**

Complete this section and attach copies of your last year's federal, state, and city tax returns (and that of the person who claims the child as a dependent if you do not). Use the *Financial Information Worksheet* form to calculate your child's Eligible Family Income. If you do not submit a tax form, the PTS will equal 10 percent of the school's tuition.

Total Eligible Family Income (see Financial Information Worksheet): \$ \_\_\_\_\_  
Percent of the School's Tuition that the PTS will pay for (see Financial Information Worksheet on Page 2): \_\_\_\_\_ %  
I do not wish to submit a tax form. The PTS I receive will equal 10% of the school's tuition (check box):

## Signatures

By signing this form, I (we) acknowledge my (our) liability to return a pro-rated portion of this benefit upon my (our) resignation, discharge or release from employment at Columbia University during the term my (our) dependent is using this benefit.

Parent's Signature: \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_

2<sup>nd</sup> Parent's Signature  
(if also an eligible CU employee on or before 7/1/2011): \_\_\_\_\_ Date (mm/dd/yyyy): \_\_\_\_\_



### 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. Write your family's total eligible income and the percent covered in the spaces provided on the Primary Tuition Scholarship Application. **If you have a question about submitting an application, or need to follow up on a claim, please call EBPA: 1-888-456-4576.**

**Eligible Family Income**

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

*Total Eligible Family Income*

\* "Taxable Income" = Line 42 on 2004 Form 1040  
Line 27 on 2004 Form 1040A, and  
Line 6 on 2004 Form 1040EZ

\*\* "Total Tax" = Line 62 on 2004 Form 1040  
Line 38 on 2004 Form 1040A  
Line 10 ("Tax") on 2004 Form 1040EZ

**PTS Coverage**

<b>Eligible 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%