

## Primary Tuition Scholarship (PTS) Benefit: Checklist

### *For Eligible Officers and their Dependent Children*

The Primary Tuition Scholarship (PTS) Benefit 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.

The following form and 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 prior to the beginning of each primary school year.

Required documentation for your application includes:

- **Primary Tuition Scholarship (PTS) - Eligibility & Application Form** – for tuition scholarship outside of Columbia University for dependent children.
- **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) - Eligibility & Application Form.** To access the form, go to <http://hr.columbia.edu/officers> and log into the CU Benefits Enrollment System with your UNI and password.

You must submit one (1) Primary Tuition Scholarship - Eligibility & Application Form for each child

To print this form:

- Under "Actions," click on "Tuition Programs, Print Your Eligibility Form."
- "Outside of Columbia University – Tuition Scholarship", print the "Primary Tuition Scholarship (PTS), Eligibility & Application Form"

You must complete each "I am applying for Primary Tuition Scholarship" section:

- **Eligible Dependent Information:**
  - Check the appropriate box
- **Primary School and Billing Information**
  - Year & Grade: K, 1, 2, 3, 4, 5, 6, 7, 8 (Check One)
  - School name, Address, City, State, ZIP Code (within the five boroughs of New York City)
  - Billing contact information and email address for the school
  - Phone number and fax number for the school
  - Tuition Bill Amount – attach copy of the full itemized tuition bill from the school
  - Grants and/or Scholarships – attach copies of official documentation
- **Columbia Officer Contact Information**
  - Please review and confirm all preprinted information listed
  - If not listed, please provide your work phone number and work email address
  - Second Officer (Check, if applicable)

**If your child is not listed on the online form**, you will need to add her/him by using the link "Add a Dependent Child" on the main menu in the CU Benefits Enrollment System. Please be prepared to provide proof of relationship (copy of birth certificate, marriage certificate, or adoption certificate/court records) to the Columbia Benefits Service Center, via email at [hrbenefits@columbia.edu](mailto:hrbenefits@columbia.edu) or secure fax at 212-851-7025.

Once the Columbia Benefits Service Center has verified the dependent relationship and *your record is updated*, you will be able to print the *Primary Tuition Scholarship (PTS) - Eligibility & Application Form*.

2. **Attach the Full Itemized Tuition Bill** – from your child’s school, which must include the primary school’s payment mailing address information.

Please attach any official documentation for grants and/or scholarships your child is receiving.

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:

Taxable Income - Total Tax = 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

**Complete the above steps and submit all required 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
- Mail: EBPA, P.O. Box 1140, Exeter, NH 03833-1140

For application status and payment processing questions, please email EBPA at [tuition@ebpabenefits.com](mailto: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](mailto:hrbenefits@columbia.edu), Subject: “PTS Question(s).”

*\*Admission to The School at Columbia University is a separate process not related to the PTS application process. For more information on applying to The School, visit their website at: <http://theschool.columbia.edu/>*

## 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

	<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	\$ _____	\$ _____	\$ _____	\$ _____
				<b>Total Eligible Family Income</b>

\* "Taxable Income" = Line 43 on 2016 Form 1040  
Line 27 on 2016 Form 1040A, and  
Line 6 on 2016 Form 1040EZ

\*\* "Total Tax" = Line 63 on 2016 Form 1040  
Line 39 on 2016 Form 1040A  
Line 12 on 2016 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%

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.**