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 qualifying 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.** You can submit an application no earlier than June 1 for the start of a new 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 https://humanresources.columbia.edu/ and click on the CUBES logo. You will be asked to enter your UNI and password and then confirm your access using multifactor authentication (DUO).

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

   To print this form:
   - Once logged in, select “Tuition.”
   - On the Tuition Programs landing page, under Outside of Columbia University - Tuition Scholarship, select the “Primary Tuition Scholarship – For Dependent Child(ren) Form.”

   You must review and complete all of the following sections of the application form:

   - **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 a dependent. Log in to CUBES using your UNI and Password, and then confirm your access using multifactor authentication (DUO). Once logged in, select “Profile,” then “My Dependents” and finally choose “Add Dependent.” Be prepared to scan and upload proof of relationship using the "Upload Documentation" link on the My Dependents screen.
If you are unable to upload documentation, you may fax your documentation to 844-301-7225. If you have any additional questions, contact the Columbia Benefits Service Center at 212-851-7000. Once the documentation is verified and your record is updated, you will be able to print the Primary Tuition Scholarship – For Dependent Child(ren) Form.

Once documentation is verified 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 Qualifying 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 qualifying 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**).

   **Qualifying Family Income Formula**:

   
   Taxable Income - Total Tax = Qualifying Family Income

   The dollar value of the Qualifying 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.epbabenefits.com](https://secure.epbabenefits.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 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, 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/](http://theschool.columbia.edu/).
PTS Financial Information Worksheet

Calculate your family’s qualifying 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.

<table>
<thead>
<tr>
<th>Qualifying Family Income</th>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
<th>Column 4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First Columbia Officer</td>
<td>Second Columbia Officer (If he/she files separately)</td>
<td>Person Claiming Child as a Dependent (If Not You)</td>
<td>Family (Columns 1+2+3)</td>
</tr>
<tr>
<td>Line A</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>“Taxable Income” from Federal Income Tax Return*</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Line B</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>“Total Tax” from Federal Income Tax Return**</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eligible Income</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Line A minus Line B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* “Taxable Income” = Line 43 on 2017 Form 1040
Line 27 on 2017 Form 1040A, and
Line 6 on 2017 Form 1040EZ

** “Total Tax” = Line 63 on 2017 Form 1040
Line 39 on 2017 Form 1040A
Line 12 on 2017 Form 1040EZ

PTS Coverage

<table>
<thead>
<tr>
<th>Qualifying Family Income</th>
<th>Percent of Tuition Covered</th>
</tr>
</thead>
<tbody>
<tr>
<td>35,000 or below</td>
<td>35%</td>
</tr>
<tr>
<td>35,001-39,999</td>
<td>30%</td>
</tr>
<tr>
<td>40,000-49,999</td>
<td>25%</td>
</tr>
<tr>
<td>50,000-54,499</td>
<td>20%</td>
</tr>
<tr>
<td>55,000-59,999</td>
<td>15%</td>
</tr>
<tr>
<td>60,000 and over</td>
<td>10%</td>
</tr>
</tbody>
</table>

Please record your family’s Qualifying Eligible Family Income and the Percent of Tuition Covered in the spaces provided at the bottom of the Financial Information to Determine Qualifying 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.