



## CDS Sliding Scale Tuition Application Process and Deadlines for Current Families

### Guidelines

- As a returning CDS family, your sliding scale tuition application will be given first consideration, before the applications of prospective families.
- You must reapply for sliding scale tuition every year; renewal is not automatic.  
**Funding may not be available to families who miss application deadlines or submit incomplete applications.**
- Returning CDS families will receive their re-enrollment/enrollment agreement/s indicating the sliding scale tuition amount during mid-February. You must return the re-enrollment/enrollment agreement/s with a nonrefundable 10% tuition deposit **within one week.**
- All sliding scale tuition decisions are provisional until your final 2021 federal tax return is received and reviewed. These provisional decisions will be revised if your final 2021 federal tax return or other information discloses a meaningfully different financial situation than reported on your Parents' Financial Statement.

### Required Documentation & Deadlines

Your sliding scale tuition application must include the following documents to be considered complete. Please keep copies of all documents for your records.

Document	Due Date	Submission Requirements
Parents' Financial Statement (PFS)	12/15/21	Upload to School and Student Services (online submission required)
Cover Sheet	12/15/21	Mail to SSS only if submitting paper documents (online submission strongly preferred).
Sliding Scale Tuition Supplemental Questionnaire	12/15/21	Upload to School and Student Services
2020 Federal Tax Return	12/15/21	Upload to School and Student Services
2021 W-2s and 1099s	2/7/22	Upload to School and Student Services
2021 Federal Tax Return	4/15/22	Upload to School and Student Services

## Application Procedures

### 1. Parents' Financial Statement (PFS) – December 15, 2021

- The core of the sliding scale application is the Parents' Financial Statement (PFS). CDS, like many independent schools, uses an outside organization, School and Student Services (SSS), to do the initial sliding scale calculation. The PFS is an SSS form that gathers information about family income, expenses, assets, liabilities and other factors that might influence a family's ability to pay tuition.
- The PFS may only be completed online; there is no option to submit the PFS by paper. If you cannot complete the PFS online, please contact Kristina Berman, Director of Enrollment Management, at 415-861-5432 x337 or [kristinab@cds-sf.org](mailto:kristinab@cds-sf.org), for assistance.
- The PFS is available on the SSS website beginning October 1, 2021. Go to <https://sssandtadsfa.force.com/familyportal/FamilyLogin?startURL=%2Ffamilyportal> and click on the prompt to begin your Parents' Financial Statement (PFS). Complete only one PFS (even if you have several children at CDS) if you are a one-household family. If you are a two-household family, complete two PFSs (one for each household). Submit the PFS no later than **Wednesday, December 15, 2021**.
- You will be given a username and password, allowing you to return to your PFS at a later date before submitting it. Please be assured that your information is secure. The school code for CDS is **1045**.
- Please be thoughtful when answering this important question so that we can accurately assess your financial situation: "How much do you believe you can pay from all sources for **tuition** and **other school-related expenses** for the 2022-2023 school year for each child you support?"

### 2. Supplementary Documents – December 15, 2021

Upload the following documents to the SSS website. If mailing documents to SSS, you must include a Cover Sheet in order for SSS to properly process your documents. Documents should be sent to School and Student Services, P.O. Box 449, Randolph, MA, 02368-0449. **Do not submit any of these supplementary documents directly to CDS; all documents must go to SSS.**

- Sliding Scale Tuition Supplemental Questionnaire. All families must complete this questionnaire.
- Final 2020 federal tax return (1040), including W-2s, 1099s and all schedules and supporting statements. These documents are only required for families applying for sliding scale tuition for the first time. If you are part of a partnership or S-Corporation, include the partnership and S-Corporation returns and all K-1s. (Families currently paying sliding scale tuition do not need to submit 2020 federal tax returns if previously provided.)

3. W-2s & 1099s – February 7, 2022

Upload copies of all 2021 W-2s and 1099s to the SSS site. If you are mailing your documents to SSS, you must also include a Cover Sheet in order for SSS to properly process your documents. Mail documents to the SSS address above.

4. Final 2021 Federal 1040 Tax Return Packet – Friday, April 15, 2022

Upload a copy of your final 2021 federal tax return (1040), including W-2s, 1099s and all schedules and supporting statements to the SSS site **and also submit a copy by mail or hand delivery to CDS** (please do not send these documents electronically to CDS). If you are part of a partnership or S-Corporation, you must also include the partnership and S-Corporation returns and all K-1s. If you are mailing your documents to SSS, you must also include a Cover Sheet in order for SSS to properly process your documents. Mail documents to the SSS address above.