



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 2018 federal tax return is received and reviewed. These provisional decisions will be revised if your final 2018 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)	12/12/18	Upload to https://sssbynais.force.com/familyportal/familylogin (online submission required).
Required Documents Cover Sheet	12/12/18	Mail to SSS only if submitting paper documents (online submission preferred).
Sliding Scale Tuition Supplemental Questionnaire	12/12/18	Upload to https://sssbynais.force.com/familyportal/familylogin
IRS Form 4506-T	12/12/18	Upload to https://sssbynais.force.com/familyportal/familylogin
2016 Federal Tax Return	12/12/18	Upload to https://sssbynais.force.com/familyportal/familylogin
2017 W-2s and 1099s	2/4/19	Upload to https://sssbynais.force.com/familyportal/familylogin
2017 Federal Tax Return	4/15/19	Upload to https://sssbynais.force.com/familyportal/familylogin and submit a paper copy by mail or hand delivery to CDS.

Application Procedures

1. Parents' Financial Statement (PFS) – December 12, 2018

- The core of the sliding scale application is the Parents' Financial Statement (PFS). CDS, like many independent schools, uses the services of School and Student Services by NAIS (SSS), an organization of the National Association of Independent Schools. 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 Diane Larrabee, Director of Admission, at 415-861-5432 x322 or dianel@cds-sf.org, for assistance.
- The PFS is available on the SSS website beginning October 2, 2018. Go to <https://sssbynais.force.com/familyportal/familylogin> 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 two-household family, complete two PFSs (one for each household). Submit the PFS no later than **Wednesday, December 12, 2018**.
- 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 2019-2020 school year for each child you support?"

2. Supplementary Documents – December 12, 2018

Upload the following documents to the SSS website. If mailing documents to SSS, you must include a Required Documents Cover Sheet in order for SSS to properly process your documents. Documents should be sent to SSS Application Processing Center, 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.
- **IRS Form 4506-T, completed and signed.** Complete only the circled sections 1a, 1b, 2a, 2b, 3 and 4, and sign the form. (This required form is submitted in addition to your taxes and schedules.)
- **Final 2017 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 2017 federal tax returns if previously provided.)

3. W-2s & 1099s – February 4, 2019

Upload copies of all 2018 W-2s and 1099s to the SSS site. If you are mailing your documents to SSS, you must also include a Required Documents Cover Sheet in order for SSS to properly process your documents. Mail documents to the SSS address above.

4. Final 2018 Federal 1040 Tax Return Packet – Monday, April 15, 2019

Upload a copy of your final 2018 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 Required Documents Cover Sheet in order for SSS to properly process your documents. Mail documents to the SSS address above.