



CDS Sliding Scale Tuition Application Process and Deadlines for Prospective Families

Guidelines

- For those prospective families who have applied for sliding scale tuition and are offered enrollment, tuition levels will be indicated on the enrollment agreements. Some families will be offered sliding scale tuition; some families will be notified that they do not qualify for sliding scale tuition; and others will be added to a sliding scale tuition wait pool. A wait pool designation means that a student will be considered for sliding scale tuition if additional funding becomes available.
- Families choosing to enroll their children must return their enrollment agreements with a nonrefundable 10% tuition deposit **within one week**.
- Funding may not be available to families who miss application deadlines or submit incomplete applications.
- 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)	1/17/19	Upload to https://sssbynais.force.com/familyportal/familylogin (online submission required).
Required Documents Cover Sheet	1/17/19	Mail to SSS only if submitting paper documents (online submission preferred).
Sliding Scale Tuition Supplemental Questionnaire	1/17/19	Upload to https://sssbynais.force.com/familyportal/familylogin
IRS Form 4506-T	1/17/19	Upload to https://sssbynais.force.com/familyportal/familylogin
2017 Federal Tax Return	1/17/19	Upload to https://sssbynais.force.com/familyportal/familylogin
2018 W-2s and 1099s	2/4/19	Upload to https://sssbynais.force.com/familyportal/familylogin
2018 Federal Tax Return (if enrolling at CDS)	4/15/19	Upload to https://sssbynais.force.com/familyportal/familylogin and submit a paper copy to CDS.

Application Procedures

1. Parents' Financial Statement (PFS) – January 17, 2019

- 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 Service 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) 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 **Thursday, January 17, 2019**.
- 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 can you afford to pay in tuition for the 2019-2020 school year?"
- Please indicate in the comment section if your family will need extended care and separately list in that section the amount you can afford to pay in tuition and in extended care costs.

2. Supplementary Documents – January 17, 2019

Upload the following documents to the SSS site. 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. **Please do not send these documents to CDS, either electronically or by mail; all documents must be submitted to SSS.**

- **Sliding Scale Tuition Supplemental 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.** If you are part of a partnership or S-Corporation, include the partnership and S-Corporation returns and all K-1s.

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 paper 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.