



since 1979

## AFFORDABLE TUITION PROGRAM INFORMATION FOR THE 2019-2020 SCHOOL YEAR

A commitment to cultural and economic diversity is an important part of San Francisco Waldorf School's philosophy. Each year, to help realize this goal, SFWS commits a significant portion of its budget to its financial aid program, the Affordable Tuition Program (ATP) for students in kindergarten to Grade 12 (the nursery is not eligible). Families committed to providing a Waldorf education for their children but concerned about their ability to pay tuition are encouraged to apply for financial aid.

To fairly determine the appropriate level of financial aid, the School uses a program devised by *School and Student Services* (or SSS), a unit of the National Association of Independent Schools. Applicants provide basic financial information to SSS through its website, [www.sssbynais.org/parents](http://www.sssbynais.org/parents); that information is analyzed and becomes the basis for a *Personal Financial Statement* (the PFS). The School uses the PFS as a guideline to determine the appropriate level of financial aid.

If you have any questions about the process or need assistance, please contact James Finn in the Business Office at 415-875-7232 ([jfinn@sfwaldorf.org](mailto:jfinn@sfwaldorf.org)).

### IMPORTANT NOTES & REMINDERS

- The School's SSS code is **7109**
- Deadlines for the ATP application are as follows:
  - **January 10, 2019** for both **RETURNING** High School and Grade School students and for **NEW** High School and Grade School applicants
- Applications are considered only when all available information has been submitted.
- In addition to completing an online application—**there is no paper version of the PFS**—you are asked to upload digital copies of personal financial documents to SSS. If you cannot create digital copies, the SFWS Business Office can assist you. Please call 415-931-2244 to arrange. The personal financial statements you need to submit are: year-end pay stub, W-2 form(s), tax return (and prior year tax return if you are applying to ATP for the first time). See the timeline below for dates of submission for these documents.
- **All paperwork is submitted to SSS through their website. DO NOT SUBMIT MATERIALS DIRECTLY TO THE SCHOOL.** The School **does not** collect information, but accesses documents through the secure SSS website. All information is kept strictly confidential.
- It is the School's policy to consider both parents' financial resources in evaluating financial need so both parents must submit information. See note below for additional information that pertains to separated, divorced or never-married parents.
- The financial information submitted to SSS is verified by them against your prior and current year federal tax returns. Any significant discrepancy between your tax return and the information in the PFS may result in a reduction or retraction of your Affordable Tuition Program grant.
- Please adhere to the deadlines. Aid is granted on a rolling basis and applications submitted on time are considered first.
- Contact James Finn at [jfinn@sfwaldorf.org](mailto:jfinn@sfwaldorf.org) or 415-875-7232 if you have questions

GRADE SCHOOL CAMPUS  
2938 Washington Street  
San Francisco, CA 94115  
voice 415.931.2750  
fax 415.931.0590  
[info@sfwaldorf.org](mailto:info@sfwaldorf.org)  
[www.sfwaldorf.org](http://www.sfwaldorf.org)

HIGH SCHOOL CAMPUS  
470 West Portal Avenue  
San Francisco, CA 94127  
voice 415.431.2736  
fax 415.431.1712  
[highschool@sfwaldorf.org](mailto:highschool@sfwaldorf.org)  
[www.sfwaldorfhighschool.org](http://www.sfwaldorfhighschool.org)

## OTHER IMPORTANT INFORMATION

**SSS DOES NOT OFFER A PAPER VERSION OF THE PFS.** You must submit your financial information for the PFS at the [sssbynais.org/parents](http://sssbynais.org/parents) website. Supporting documents—W-2 forms, tax returns, etc. should be submitted digitally through your online account. Online submission gives the School almost immediate access to the information and eliminates the possibility of lost or missing documents at SSS (keep in mind thousands of families nationwide are submitting information). Please contact the Business Office if you need assistance making digital copies

**DIVORCED, SEPARATED OR UNMARRIED PARENTS** San Francisco Waldorf School requires that separated or divorced parents requesting financial aid **BOTH** complete financial aid forms. This includes the custodial and non-custodial parent. Each parent is required to submit all the required documents. The School typically issues separate enrollment and tuition contracts for each parent; financial and other information is not shared by the school between parents.

The School's policy in determining the financial need of students whose parents are separated or divorced is based on the following principals. Remarriage of either parent creates a new family unit with new relationships but we believe that natural (or adoptive) parents still have a responsibility for educational expenses despite any legal agreements to the contrary. Therefore, the income, expenses, assets and liabilities of the entire new family unit are considered in addition to the natural (or adoptive) parent's ability to contribute to the cost of education.

The term **custodial parent** refers to the parent with whom the student resides (or resided with most during the 12 months prior to the date of the application). The other parent is referred to as the **non-custodial parent** even in cases where parents legally share joint custody. Please remember that under joint custody, both parents are jointly liable for the full amount of tuition owed.

The School wishes to minimize any potential problems students might encounter as a result of this policy, so the Affordable Tuition Program Committee will consider any special circumstances that might prevent compliance, specifically, if the location of the non-custodial parent is unknown or the non-custodial parent has had no contact with the family for more than three years.

## LINKS TO ONLINE INFORMATION

- Access the SSS website at <https://sssbynais.force.com/familyportal>; returning families **SHOULD NOT** create a new account, but should sign in as a returning family using prior year login information (for help see <http://sssbynais.org/parents/apply/logging-into-the-family-portal>). The link to logging in or creating an account with SSS is found on the right side, the green button *Complete Your PFS*.
- **Do not apply until October 2, 2018.** If you apply before that date, you will be completing the application for the current academic year—2018-2019—not next year.
- The SSS website has many links to material that will help you complete the application. Visit <https://www.solutionsbysss.com/parents>

# TIMELINE FOR COMPLETING THE ATP APPLICATION

DATE	WHAT YOU HAVE TO DO / WHAT HAPPENS
October 2, 2018 – Early January 2019	Go to <a href="http://sssbynais.org/parents">sssbynais.org/parents</a> and complete the <b>Parents' Financial Statement (PFS)</b> by using the <b>Complete your PFS</b> link on the right-hand side of the page. If this is your first application, you will need to create an account with SSS; your user name and password will give you access to the account throughout the application process. Returning applicants should use the login information from the prior application year. <b>You don't need to complete the application in a single session</b> and may sign out and return to the application as you wish. ▪ The fee is paid to SSS and is collected at the end of the application upon formal submission of the data. Beginning this year, SSS will award fee waivers based on need, to be determined after you submit your financial data; SFWS will no longer award waivers or determine eligibility for them. ▪ <b>The SSS code for San Francisco Waldorf School is 7109.</b> When you provide this code you give the School access to the data and the SSS analysis. ▪ In order to complete the PFS most efficiently, you will need latest tax returns, bank and investment account statements and family budgeting information
January 10, 2019	<b>DEADLINE FOR ALL APPLICANTS, EITHER CURRENTLY ENROLLED OR PROSPECTIVE STUDENTS. Upload copies of the following documents to your SSS account.</b> <ul style="list-style-type: none"> <li>• Paycheck stubs for December 2018 when available. W-2's are due February 1, 2019.</li> <li>• 2017 US tax returns. Families who uploaded 2017 returns for last year's application do not need to re-submit 2017 returns. Current families applying for the first time should. 2018 US tax returns must be uploaded upon filing in April 2019.</li> </ul>
February 1, 2019	<b>2018 W-2 FORMS</b> Upload to your SSS account. Employers are required to provide W-2s for 2018 by January 31, 2019
February 1-2, 2019	<b>RETURNING FAMILIES</b> receive email links to enrollment contracts and financial aid awards
February 11, 2019	<b>RETURNING FAMILIES</b> Contracts, deposits and ATP letters are due for <b>returning</b> families, Kindergarten to High School
March 12, 2019	<b>1<sup>ST</sup> YEAR KINDERGARTEN APPLICANTS</b> receive email links to decision letters and financial aid letters
March 19, 2019	<b>1<sup>ST</sup> YEAR KINDERGARTEN APPLICANTS</b> Decision letters and signed ATP letters <b>are due to SFWS</b>
March 21, 2019	<b>2<sup>ND</sup> YEAR KINDERGARTEN AND NEW GRADE SCHOOL APPLICANTS</b> receive email links to decision letters and financial aid letters
March 21/22, 2019	<b>NEW HIGH SCHOOL APPLICANTS</b> Enrollment and financial aid award decisions mailed to <b>new</b> SFWHS applicants on March 21 <sup>st</sup> ; information emailed March 22 <sup>nd</sup> after 4 pm.
March 27, 2019	<b>NEW HIGH SCHOOL APPLICANTS WHO APPLIED FOR ATP GRANT</b> Contract and deposit due by noon
March 29, 2019	<b>NEW HIGH SCHOOL APPLICANTS WITH FULL TUITION CONTRACTS</b> Contract and deposit due by noon
March 28, 2019	<b>2<sup>ND</sup> YEAR KINDERGARTEN AND NEW GRADE SCHOOL APPLICANTS</b> Decision letters and financial aid letters <b>are due</b>
April 18, 2019	<b>2017 Federal tax returns.</b> Upload to your SSS account. If you file Form 1040, include Schedules A-E, as applicable. Each of these schedules is normally 1-2 pages. You <b>DO NOT</b> need to include the tax preparation software "worksheets" that often accompany the schedules.
May 31, 2019	Final day to withdraw from the Enrollment and Tuition Contract without additional payment
July 5 <sup>th</sup> or 20 <sup>th</sup> 2019	First tuition payments due
October 16, 2019	Deadline for recipients who filed extensions for their 2017 Form 1040 to upload the return to their SSS account