Education Savings Account (ESA)

Class Wallet Approval Process
What is ClassWallet?

ClassWallet is:

- a separate company who partners with the NCSEAA.
- an online platform that hosts the electronic debit account and payment processing on behalf of the ESA Program.
- where ESA families can make a payment to a participating school or an approved service provider.
- how families will purchase products that are ESA Qualified Expenses.
Qualified Expenses for ESA Funds

The ESA Program provides funds in an **electronic debit account** for families to use to pay tuition and required fees at a participating school. Families may also use the funds to pay for qualified expenses related to educating a child with disabilities.

- **Textbooks**
  - Required by the participating nonpublic school

- **Educational Technology**
  - Educational technology information [here](#)

- **Curricula**
  - Grade appropriate and supports an academic subject

- **Fees for Nationally Standardized Tests**
  - Available for homeschool families; contact ESA in advance
  - Not available for students enrolled in participating nonpublic schools

- **Tutoring and Teaching Services**
  - In academic subjects only

- **Educational Therapies**
  - Ex. ABA, Speech, OT, and PT

- **Student Transportation**
  - To and from educational services or activities

**NOTE about providers of these services:**

1. Must be registered with AND approved by NCSEAA
2. Cannot be member of student’s family
Provider Registration

The ESA Program requires that all service providers are registered with and approved by NCSEAA. Click here for Provider Registration details.

There are three items providers submit to become an approved provider for the ESA Program:

1. Registration
2. Agreement
3. Credentials

*Tip: Submitting all three items at one time will speed up the registration process!

This process is not for schools, but for providers of tutoring/teaching services, educational therapies, and transportation.
# What Should an Invoice Show?

<table>
<thead>
<tr>
<th>Tuition/fee invoice</th>
<th>Tutoring/Teaching Services and Educational Therapy invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Name of the school</td>
<td>• Name of provider or company</td>
</tr>
<tr>
<td>• Student’s name and the name of the parent/guardian being charged</td>
<td>• Student’s name and the name of the parent/guardian being charged</td>
</tr>
<tr>
<td>• Line item showing the specific ESA quarter and amount being transferred to pay tuition/fee charges</td>
<td>• Type of service/therapy</td>
</tr>
<tr>
<td>• Line item for 2.5% Transaction Fee, if included</td>
<td>• Amount charged for service/therapy expense</td>
</tr>
<tr>
<td></td>
<td>• Line item for 2.5% Transaction Fee, if included</td>
</tr>
</tbody>
</table>

**Curricula or Educational Technology invoice**

- Items must be selected and approved for purchase on the ClassWallet platform
Paying a School or a Provider on ClassWallet

1. Get an invoice from your school or provider at the time of service.

2. Login to ClassWallet.

3. Click “Pay Vendor“.

4. Search list for participating school or approved provider and select vendor you would like to pay.

5. Upload invoice issued by school or provider.

6. Enter amount, purse funds, and expense category.

7. Submit for ESA staff to review.

Need detailed steps or a ClassWallet video tutorial? Click here.
Paying a School or a Provider on ClassWallet

What happens after I submit my payment?

• NCSEAA staff reviews the transaction for approval.
  *staff reviews transactions in the order in which they were received*

• If approved by NCSEAA, the payment is processed.
  *ClassWallet processes the payment*

• Providers and schools will receive the payment electronically to their bank account.
  *allow at least 3-5 business days*
Purchasing Products on ClassWallet

1. **Login** to ClassWallet.

2. Click on "Start Shopping" on the main screen.

3. Go to “View All Stores” and select a ClassWallet Marketplace vendor (ex. Amazon, Scholastic, Staples).

4. Select items (see [Qualified Expenses](#)) to purchase and check out.

5. Submit order for ESA staff to review.

6. Order processed once ESA staff approves it.

*Need detailed steps? Click [here](#)*
# Getting Assistance

<table>
<thead>
<tr>
<th>If I have a question about...</th>
<th>If I have a question about...</th>
</tr>
</thead>
<tbody>
<tr>
<td>logging in to ClassWallet</td>
<td>ESA qualified expenses</td>
</tr>
<tr>
<td>uploading an invoice</td>
<td>a rejected order or invoice</td>
</tr>
<tr>
<td>returning an item</td>
<td>my participating school and the vendor list</td>
</tr>
<tr>
<td>a shipment (ex. missing item, address)</td>
<td>my approved provider and the vendor list</td>
</tr>
<tr>
<td>any technical issues related to ClassWallet’s website</td>
<td>how to purchase curricula and educational technology</td>
</tr>
<tr>
<td>finding a product on the Marketplace</td>
<td>my ESA funds and disbursement</td>
</tr>
</tbody>
</table>

Then I should contact...

<table>
<thead>
<tr>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:Help@classwallet.com">Help@classwallet.com</a></td>
<td>1-877-969-5536</td>
</tr>
<tr>
<td><a href="mailto:ESA@ncseaa.edu">ESA@ncseaa.edu</a></td>
<td>1-855-330-3955</td>
</tr>
</tbody>
</table>
Education Savings Account (ESA)

***Reminders***
Parents must spend at least $1,000 on their student's education in an academic year in order to renew for the next year.

At the beginning of each school year and before each quarter, parents must certify the use of funds.

ESA funds roll over as long as the student remains eligible and participating in the ESA program. Access to any remaining funds is lost once the student lose program eligibility. Parents should spend older funds first.