

## Transcript

### **ESA+ and Opportunity Scholarship: How do Schools get Paid? (and when are ESA+ funds sent to ClassWallet?)**

June 15, 2022

0:05

Good afternoon, everyone.

0:07

Hope you're all having a good day so far during the lunch time hour. Want to welcome you all to the second session of our ESA Plus lunch day webinar series. Today we're going to talk about ESA Plus payments to participating schools, and to ClassWallet.

0:26

I'm Tiffany Jatta. Again, welcome. I'm the K 12 Program Manager for the ESA Plus program. And with me today I have my colleagues, Michele, Amber, and Mykayla, who will be working with you throughout the year with the ESA Plus award you've received, as well as our program director, Kathryn Marker.

0:46

So, I'm gonna go ahead and get started, I see people are joining the room.

0:53

Just a few housekeeping notes. A copy of the presentation and the slides are available as handouts for you today to take to use for future reference.

1:07

The presentation today will run about 30 minutes.

1:11

We're going to go through the entire presentation, and at the end, we will take questions and answers.

1:19

Feel free to put your questions in the question box. We are going to want to limit it to just questions specific to this session today.

1:29

We do have several other trainings in the future for the next couple of weeks, so we'll ask that you hold questions, particularly to any other sessions, for that time.

1:47

So without further ado, we will get started.

1:51

So just want to congratulate you all on getting selected to get an ESA Plus award for your student. I know you're excited and anxious. Last week, we went through the parent agreement, and what your obligations will be to use this award to benefit your student.

2:11

And like I said, today we're just going to talk about how the payments will go to the schools, as well as to ClassWallet.

2:22

So the training will explain those processes.

2:25

The K 12 scholarships have a process and there are three parties that have responsibilities during this payment process.

2:35

Those are the parents, the non public schools, which are responsible for certain steps, and then the K 12 program staff complete other steps.

2:45

The North Carolina State Education Assistance Authority, or SEAA, is the agency which administers the K 12 programs, including the Opportunity Scholarship, and Education Student Accounts program.

3:07

So, you've gotten your award.

3:10

Everything's golden. So, what are your next steps?

3:17

The award offer for new families will be canceled if an acceptance is not received by the due date in your MyPortal account.

3:28

So, even if you have not accepted the offer, you'll want to go ahead and do that. If you don't have a school choice yet, you're still making plans, we still encourage you to go ahead and accept the offer.

3:42

You can always come back later, add your school choice. We're also going through this process now, where we're finalizing award amounts for families.

3:52

We can get all that worked out. But we do need you to go ahead and at least accept the offer to hold the slot for your student.

4:01

If your plans change and you won't be able to use this award for the upcoming school year after you've accepted it, please let us know immediately so we can cancel that offer. That will free up those funds for another family to use.

4:17

Additional documents will be requested between now and the start of the school year.

4:22

These documents will be signed electronically via DocuSign, which many of you probably have already started that process.

4:30

And these documents must be submitted in order for you to keep the award offer for your student.

4:37

These forms are submitted to SEAA securely via the DocuSign platform.

4:44

Parent and student information aren't at risk during this process of completing those forms electronically.

4:51

And as a reminder, we want to remind you, it is your responsibility as the parent account holder, to check your MyPortal account weekly, as long as your student is connected to the K 12 programs.

5:11

So, exactly how do the schools get paid?

5:16

Schools are responsible for certification.

5:20

The family does not have the responsibility to certify a student.

5:26

During certification, this is the process when schools, officially state that a student is enrolled and attending their school.

5:34

School officials provide the cost of attendance, which is tuition and fees for the students attending their school.

5:44

This is important to note.

5:45

If your school choice is incorrect in MyPortal as of August first, there will be significant delays with certification.

5:57

Because certification starts the payment process, a delay will mean a delayed payment to your school.

6:09

There are a few schools that choose not to participate in any of the K 12 programs to receive disbursements directly.

6:19

In those particular cases, the parents will pay out of pocket and are reimbursed at the end of the semester.

6:29

If your school doesn't sign up to receive direct payments, we want you to plan to attend the June 22nd training, which will explain more detail about how that process works.

6:54

So, I've talked a little bit about certification.

6:57

The process the schools are responsible for.

7:01

And during that process of certification the K 12 programs will calculate the award amount for your student.

7:13

If your student has Opportunity Scholarship, the award calculation includes whether or not the student is a 90% or full scholarship recipient.

7:26

For those of you that may be receiving both awards, that calculation for the ESA Plus award includes reviewing what the Opportunity Scholarship has already paid.

7:38

So in the payment hierarchy, if your student is at a participating school, opportunity scholarship will be disbursed to pay tuition first.

7:49

If there is a balance left of tuition after the Opportunity Scholarship has paid then ESA Plus will pay the remaining portion of tuition and fees.

8:00

If your student is a dual recipient, we ask that you try to plan to attend the July 20th training, which will explain details about that specific scenario.

8:15

Now, for our home-school families that may be on the line, you will not use K 12 funds to pay tuition to a school.

8:24

If your student is homeschooled, we ask that you plan to attend the July 13th training, which will explain more about how your student can benefit from funds.

8:54

OK, so a little bit about the process of endorsement, and this applies to students enrolled in a participating school.

9:06

Endorsement is the act of officially approving the scholarship amount.

9:11

Schools endorse first, then parents endorse.

9:15

And parents aren't able to endorse until the school endorses.

9:22

And with the endorsement process, because that is the act of officially saying you're approving the scholarship amount, it's very important that you look at that in your account before you complete that endorsement.

9:36

If you feel that amount is incorrect, we ask that you don't endorse. Please contact us so we can make sure that amount is correct for you.

10:02

And I just want to re-iterate that again.

10:05

Endorsement is the act of officially approving the scholarship amount.

10:13

So please, in order to prevent delays, if you look at that amount and you think it is incorrect, we ask that you don't endorse. Contact the program as soon as possible.

10:30

So in the order of this payment process, just step back a minute.

10:35

The schools certify first, if the student is at a participating school.

10:42

The school endorses the amount.

10:45

The parent endorses the amount, if it's correct.

10:51

And once the parent endorses, funds will be disbursed to the school 1 to 2 weeks after that final endorsement that's done by the parent.

11:09

OK, so I've said this word disbursement a couple of times, what does that actually mean?

11:16

Disbursement is when funds are paid to the school.

11:20

And we send funds electronically to the school on behalf of the student.

11:26

The school will then apply those disbursed funds to tuition due per student.

11:34

Delays in disbursement can happen if certification is late, or if schools or parents don't endorse in a timely manner, or if you the parent changes your school choice after August first.

11:50

So, this will be really important.

11:52

I know you may still be making plans to decide what's the best fit for your student as far as school. But we really want you to keep in mind if you have to make a school choice change after August first.

12:06

You're welcome to do that, and we'll accept it. But you just need to know that will delay payment getting to your student's school.

12:23

OK, so here on this slide, is just a visual of the order of the payment process.

12:32

Certification First.

12:36

The award calculation done by the K 12 program.

12:42

Schools and parent endorses.

12:46

And after the parent endorsement, the K 12 program sends the money to the schools, 1 to 2 weeks later.

12:55

Typically, awards are made in spring or early summer, which we've just completed that process, you've gotten your award offer.

13:05

Parents respond to the award offer at that time, which you've done now.

13:10

Or you're planning on doing by the deadline.

13:14

Schools certify in August.

13:19

And again, the schools, then the parents endorse for fall semester, in August or September.

13:26

And the spring endorsement is completed in January or February.

13:35

Re-iterate it again, disbursement is 1 to 2 weeks after the parent endorses.

13:42

So this slide here shows a typical disbursement or payment schedule.

13:48

Again, we stress delays will occur if your student changes schools any time after August first.

14:00

Again, delays also occur if the schools don't certify or endorse timely or if the parents do not endorse timely.

14:19

So that was some information on the payment process for schools.

14:25

So let's talk a little bit about how families interact with ClassWallet.

14:37

So in this slide, we have the groups of families that we, SEAA, will be sending money to on behalf of the student.

14:46

So we have our families with ESA Plus funds that remain after tuition is disbursed to a participating school.

14:54

We have our home-school families, our dual award families.

15:01

And this is if Opportunity pays all tuition and fees.

15:06

Then we also have families with students attending schools that don't participate in the K 12 programs.

15:13

You will have funds that go to ClassWallet.

15:22

So for those of you that are new to the program, exactly when will those funds be sent to ClassWallet?

15:34

Late August, if your student is in a home-school.

15:40

And in September, if your student will be attending a participating school that would need to be paid first.

15:50

And, again, we can't stress enough, please make sure your school choice is correct in MyPortal.

15:58

If it's not, there will be delays with your payments to your schools, and to ClassWallet if your school choice is not correct as of August first.

16:06

If your school choice is not correct, or you have to make a change after August first, it is likely that you will not receive payment until October.

16:17

So, you really want to sit down and map out as best you can, your plans for school, for the upcoming school year.

16:27

As I mentioned, you are able to change the school choice, but just keep in mind that it will cause significant delays in getting payments sent to your student's school or to ClassWallet if your student is home-schooled.

16:55

So this was a rather short presentation.

16:58

We've got the schedule of events.

17:04

I passed out upcoming events.

17:08

If you need to e-mail us, our e-mail address is available. We're here anytime to help.

17:14

And also our customer service number.

17:17

We are open from eight am to six pm, Monday through Thursday.

17:25

Eight am to five pm on Fridays.

17:26

And our toll free number is listed above.

17:34

So that concludes the presentation portion. Team, are there any questions that we need to address or we can talk about with the group?

17:52

[Kathryn} Tiffany, this is Kathryn. There are a number of questions about summer expenses.

17:58

[Kathryn] So I would want to point people to the July 27th session, which is about planning for summer.

18:06

Of course, it's planning for summer 2023, because this award, if you're a brand new family, your award doesn't start the summer, it starts with the fall semester.

18:17

Now, having said that, we believe there are ways for families who home-school to use their funds effectively in the summer, but this summer, before you've even started for the first time, that's a little harder.

18:28

But, I would encourage, particularly, the families who home-school to plan on attending that session at the end of July, so that they can think about strategically how to use their funds next summer.

18:51

[Tiffany] Team, were there any other questions that we could address with the group?

19:01

[Kathryn] Think there are a lot of questions about the specifics of when the funding flows. So maybe I can restate that, because Tiffany covered in our presentation about the timing. if your student is enrolled in a school and you've told us what that school is by August first.

19:20

Your school should expect to complete its processes at the end of August and have the funding by the end of August for fall.

19:29

Now, a lot of that depends on whether the school does its steps timely, because, as Tiffany noted, they have to certify the students and you and they have to endorse.

19:39

If one of those folks, either the school or you, delays in one of those steps, then funding is delayed.

19:46

But if everyone does everything timely, the schools could have their funding for the fall by the end of August.

19:53

If you're the family of a home-school student, you, too can have your funding by the end of August.

19:58

So it's not possible to have it in July, to be clear.

20:03

And we will connect you to ClassWallet, and that's how a family of a home-school student will manage their account, and they will have access to that in August.

20:16

And, again, we believe there's ways you can strategize as a renewing student next year, to plan for your summer. But it is true that you're not going to have funding in July this year as a brand new student. We don't have it yet.

20:33

We don't get it until after the start of the fiscal year, which is in July, and processes can't start before August. And that is a fact, but we do believe there are some ways to strategize for summer next year as a renewing student, so we'll work with you more about that as you get started in the program.

20:53

Hopefully that helps, that quick reminder.

21:03

Again, I wanted to emphasize what Tiffany said, which is, if the school choice is not correct as of August first, then timing is much more complicated.

21:13

So, for example, if you are enrolled in one school but your MyPortal record is not accurate, and shows another school, there will be a delay getting your school paid.

21:24

And, you know, there are very good reasons why families change their minds in middle of August, and that's certainly acceptable. Families can transfer, they can change their school choice.

21:34

We just know that that does delay payment, but it's OK. You know, it can happen, the school will get paid.

21:42

On that topic, I might point out that at the end of this month, so two weeks from today, there's a session about choosing your school resources that are offered to help you find the right school.

21:52

I noticed someone is asking about the choice between home-school and choosing a private school.

21:57

So, there's some resources we can offer that might help you with that decision.

22:03

Also, the process of changing your school. How do you do it? What are the pros and cons of the timing, and how much money can you take to the second school, the first school? Maybe, you know, you're there for some time, they get some money.

22:16

The second school, when you transfer, can have the rest of your award, how does that all work? So, that's the topic for June 29th.

22:33

[Tiffany] OK, thanks Kathryn.

22:35

Well, if there aren't any other questions. [Kathryn] Well, you know, Tiffany, let me say one more thing, and that is, I just noticed a comment from someone just a moment ago. They might be in a public school, and so it's worth mentioning that the ESA Plus program does not serve students who are full-time in a public school.

22:53

To be clear, if your student is in a public school full-time, this is not the program for you.

22:58

This program helps students who are in a private school or home school, and there are various ways that can help students in those scenarios, but there is nothing in the ESA Plus program for a student who is in full-time public school, so just being real clear about that, and, you know, you can e-mail the program if you feel like your scenario is something unique, and my explanation doesn't seem to fit you.

23:22

But there is no funding available to students who are enrolled full-time in a public school.

23:31

Thank you, Tiffany.

23:32

I squeezed that last little comment in there, but I know there are a number of questions, and maybe we should say that if you have some really specific questions about your record in MyPortal, maybe your provider, you might need to e-mail just because of this short timeframe, we might not be able to dive into a unique situation.

23:53

But you can e-mail. We'll keep plugging away to get you the information you need.

23:59

[Tiffany] Yes, absolutely, and thank you, Kathryn, for that reminder about public school. Yes, definitely, you can't benefit if they attend public school full-time.

24:15

[Kathryn] I think that's all. I mean, there are some unique questions we didn't get to, or that appeared to be one-off.

24:21

Please e-mail us and I hope you'll attend some of these other sessions, but I think that's it, Tiffany.

24:27

[Tiffany] This was one of our shorter sessions, apparently. Well, if there are no other questions we thank you for taking some time to attend today.

24:38

And we'll give you a few minutes back and enjoy the rest of your day.