Transcript
ESA+ and Home School:
Qualified Expenses and Shopping on ClassWallet

7/13/22

0:05
Good afternoon, everyone. Thank you so much for joining us for today's webinar, and we're going to give everyone a few more minutes to join, and we would appreciate your patience.

1:19
Thank you for your patience, and, again, good afternoon.

1:24
Welcome to our ESA Plus session on home school and qualified expenses and shopping on Class Wallet.

1:34
My name is Tiffany Jatta, one of the K12 Program Managers.

1:43
We've got our ESA Plus power team of Michele, Amber, and Mykayla, that will also be assisting us, and presenting some of the topics to you today.

1:55
I just want to let you know that we do have handouts available for you today.

2:01
Print off as a PDF or download to your computer at the end of the presentation.

2:09
Everyone will remain muted.

2:13
And you can put your questions in the question box or in chat.

2:28
OK, so as I said a moment ago, we're going to go ahead and get started with the presentation. The ESA Plus helps families afford non public schools, which are private and home schools.

2:41
A student who is attending public school full-time is not eligible for ESA Plus funding, so we just want you all to keep that in the back of your mind if you plan to be enrolled in public school full time.

2:55
These particular sets of funding won't be an option for you.

3:03

Now the purpose of this training session today is to provide a walkthrough of the categories of the expenses that the ESA Plus funds can cover.

3:15

We will discuss learning how to spend your funds on Class Wallet and strategize about using ESA Plus to help with your child's education.

3:33

In addition to helping families who home school, this presentation can assist parents who might use ESA Plus funds that are available after their school's tuition and fees are paid. These families will access their remaining semester funds in Class Wallet.

3:57

This session is substantial. We expect the presentation to take the entire time today.

4:03

So, again, feel free to add your questions in chat, or put them in the question box, however, we don't expect to be able to answer all questions today.

4:13

We will use them as the basis for a follow-up presentation after fall funding has disbursed.

4:50

ESA Plus does not reimburse families for expenses. That's something important that you'll want to keep in mind.

4:56

Families send payments to providers and make purchases on the Class Wallet platform.

5:03

Providers only submit their credentials to become a qualified provider one time.

5:12

ESA Plus maintains a list of providers who are already approved.

5:17

And if someone on the team doesn't mind, can you drop that URL for our list of approved providers in the chat, please?

5:26

Thanks.

5:34

However, preferred service providers and product providers can also be added to the Class Wallet platform, and we'll talk about that more later on in the presentation.

6:09

Parents will submit an invoice in Class Wallet for educational therapies, student transportation, and tutoring.

6:16

When the invoice is approved by ESA Plus staff, the funds are transferred to the approved provider.

6:24
Parents shop on the Class Wallet marketplace for technology and curricula.

6:37
There are many stores, many of which specialize in materials for students with disabilities.

6:45
OK, I hope everyone can hear me. Amber said the audio was going in and out.

7:23
On this slide, we have some examples of expenses that are not eligible to be purchased with ESA Plus funds.

7:47
The use of ESA Plus funds is governed by North Carolina law.

7:49
Funds may not be used to purchase certain items.

7:52
I guess I stated these that are on this slide.

7:57
Parents can use the ESA Plus funds for online services such as tutoring.

8:04
ESA Plus parents who home school cannot use ESA Plus funds to pay tuition.

8:15
Again, if your student is homeschooled and you are looking to pay tuition for in-person or online home school programs, this program is not for you.

8:40
Next, Mykayla is going to talk for a few minutes and go into more detail about curriculum.

8:46
Mykayla?

8:47
[Mykayla] Thank you, Tiffany. So these next few slides, we'll speak about curricula and the little bit about educational technology. So, for curricula, when purchasing curricula from our online vendors within Class Wallet you want to keep a few things in mind. One being that the materials are going to be grade appropriate, someone's purchasing materials, they should be a purchase approximately at your student's grade level. For example, if your child is in the third grade, items for a ninth grader should not be purchased.

9:19
However, we do understand that we do have some students in our program that may not be learning at their grade level. So if this is the case, when you are purchasing items on Class Wallet, you can leave a comment within the order, just letting us know why you're ordering something that does not match your student's grade level.

9:37

It is also important to keep in mind the curriculum must support an academic program. We want to consider the subjects English, math, science, and history.

9:47

Foreign language materials are also acceptable.

9:50

ESA Plus funds do not pay for music lessons, art materials, or physical education. You are able to purchase a membership to online curriculum.

10:01

It is also important to note ESA Plus offers vendors via Class Wallet that have curricula, which is appropriate. However, not all of these vendors' products can be approved. We hope you'll take the time to learn what a qualified expense is and what is not. We look forward to assisting you more with this in the fall. Later in this presentation we'll discuss an enhancement coming soon that will allow you to more easily connect with other providers of curriculum.

10:28

On the next slide, we'll talk about educational technology.

10:35

For educational technology, it is important to note that funds cannot be used for the same category of an item within three years. This limitation is particularly important when it comes to purchasing a computer or a tablet. So a desktop or laptop are considered as one category and then the tablets such as an iPad is considered as another one.

10:56

Accessories for computers may be purchased in a bundle within the purchase of a computer. Again, once every three years.

11:03

So for example, the wireless keyboard and mouse, printer cables. It is also important to note that educational technologies over $600, for example, speech, vision or hearing devices also cannot be purchased again within three years. The three year limitation, just to provide a quick example on how it works.

11:23

If you purchase a laptop for the 2022, 2023 school year, you will not be able to purchase another laptop or desktop, or a tablet again until the school year of 2025, 2026.

11:42

Then, on the next slide, we will talk about what our excluded items are for educational technology.

11:48

Such items would include cell phone, Internet, or cell phone service.

11:53

A modem, gaming consoles like an x-box, product or service installation, televisions, cameras, and photographic equipment.

12:02
Word processing programs, such as Microsoft Office, iPods, items that are purchased with the cell phone, USB drives that are not purchased within a technology bundle, as well as headphones unless they are specifically designed as an assistive device. Now it is important to note that we know that televisions can be used as monitors, however, ESA Plus funds cannot be used to pay for household items such as televisions.

12:45
We are going to shift to providers and Michele is going to talk a little bit about that process.

12:56
[Michele] Thank you, Tiffany. I really appreciate that.

13:00
So, in order for a provider to get on the approved provider list, they must register and go through an approval process with SEAA.

13:12
The steps for that process, brief steps are on the slide.

13:19
The approved provider lists can be found on our website by navigating to our webpage as shown on the slide.

13:29
The list of the approved providers list is very long.

13:34
Please note that the list will be enhanced in August with a searchable function, so we really appreciate your patience as we roll that out.

13:49
ESA Plus maintains a list of approved providers to assist parents.

13:55
The program does not mean to endorse any provider.

14:00
Also an appearance on the approved list is not an assurance of quality.

14:08
However, because providers need only register one time, we provide a list so parents know whether or not their preferred provider has already registered.

14:19
ESA staff are continually adding providers as parents encourage their preferred tutors and therapists to register.

14:29
Yes.

14:39
So, this is the information that must be included in an invoice for payment, for tutoring services, or therapy services. You can see that on the slide.

14:53
Without all details listed on an invoice, the payment will be delayed.

14:58
If the payment amount is greater than the total amount due and balance on the invoice, the payment will be rejected, So please note that you cannot pay a provider more than what the invoice shows.

15:23
As you may know, Class Wallet will provide the online platform in which families will pay approved providers.

15:32
Like what a credit card company Class Wallet has a transaction fee.

15:38
Providers can charge the transaction fee back to the parent who can use ESA Plus funds to pay it.

15:49
Please note, this is very important.

15:52
This can only happen if the provider already has a general policy of charging for all credit card fees.

16:04
If the provider doesn't charge extra to other customers who pay with a Visa over paying with cash, then they should not charge the ESA parent for the Class Wallet transaction fee.

16:19
Providers charging an extra fee to pay with a credit card should be uncommon.

16:27
Does your school or provider have a policy of charging all customers who pay other than in cash?

16:33
Here's a tip: A provider could establish a transaction fee.

16:38
They could add a line item called transaction, or transaction fee to the invoice, and note a flat amount roughly equivalent to 2.5%, which is the amount of the fee.

16:53
That way, they provide the parent with an invoice that accounts for that transaction fee in advance.

17:11
On this screen, you're going to see just a few examples of approved companies you may already be familiar with.

17:19
So this is not an endorsement for anybody, this is just to show you some samples. There are also a number of private tutors who are already registered.

17:33

An example of a private tutor would be like if you are arranging for your neighbor with a math degree or a retired teacher to tutor your student, these types of tutors will register as a provider. And you will pay them through Class Wallet.

17:53

The process and the required qualifications are on our website.

18:00

And we can put a link in there for that.

18:06

And that's all I have, Tiffany.

18:13

[Tiffany] Thanks so much, Michele. And I don't think I mentioned it before you started your section with the providers.

18:22

In August, there will be more resources and training support available for you all. And, again, as we mentioned, we are in the process of making product provider enhancements. We talk about this later in the presentation.

18:33

We are also improving the provider registration process.

18:34

So we just want you to stay tuned for that, and we appreciate your patience as we work to make these enhancements available for you.

18:53

Now, to the fun part. Shopping. How to Purchase on Class Wallet.

18:58

And Amber is going to walk through a few slides with you about making purchases.

19:02

And I just want to remind you that ESA Plus does not reimburse family for purchases made elsewhere. You will need to make your purchases on the Class Wallet platform.

19:24

[Amber] Thanks, Tiffany.

19:26

As we mentioned earlier, Class Wallet is a separate company that partners with SEAA. SEAA administers the ESA program and Class Wallet provides the electronic account on behalf of the ESA program.

19:41

Take a moment. You can read this slide.

19:56

Here's a screenshot of the login page in Class Wallet. We expect a family, home school to be able to start shopping on Class Wallet by late August. And this is a screenshot of what the login page looks like.

20:21
Once you login, you'll click Start Shopping. Here's a screenshot of the page for you to view.

20:28
Then you can start shopping it.

20:41
Once you start shopping, you'll see an advertisement of a store. Here's a snap of the advertisement that's currently on the page. Please note that the store advertisements vary. So it looks a little different when you do login to start shopping.

21:06
Here, you see a screenshot of some of the vendors. Understand that these are not all the vendors, but these are just a few of the popular ones that we see more frequently.

21:27
OK, once submitting an order, you will only select one expense category. If it is rejected ESA Plus staff will provide an explanation for the rejection.

21:55
ESA staff can only approve or reject your entire order. As previously mentioned, please only select one expense category, and don't mix expense categories. For example, don't mix a technology incorrectly in the same transaction. If you have a number of questionable items, put those items in a separate order.

22:35
And while we're on this slide, I also want to point out to you all that ESA Plus approves and rejects orders, not ClassWallet.

22:46
If you have questions about a potential purchase you want to make, please reach out to us by e-mail, and we can talk through it with you to let you know whether or not the item will qualify.

23:00
Class Wallet customer service can help you with their platform, and they can also help you to make a return or an exchange for an item that you purchased.

23:27
Our program director Kathryn Marker will talk about upcoming enhancements for providers.

23:32
[Kathryn] Yes, this is Kathryn Marker.

23:35
I'm glad to be here to help the team a little bit with what's coming soon. So, we've been working hard on some enhancements that we wanted to tell you about.

23:46
It's mostly about providers.

23:49
So, let me tell you a little bit about it, because the presentation so far has been about what's available now, which is important. But we wanted you to know that there are some ways that the program can work better for you.

24:02
And we're already on our way. So first, let me say that when we say provider we're usually talking about a service provider, somebody who provides the service, not selling things. So usually we're talking about service providers, tutors, therapists.

24:20
We have, however, plans to launch a product provider option that supports bullet point you see here by September.

24:30
Now, these are stores.

24:32
These are curricula providers, primarily, that we're targeting, and for whatever reason, these particular stores are not available on Class Wallet.

24:42
Now, there's a lot of curriculum that you can purchase on Class Wallet already to be clear.

24:46
But we also recognize that there are some specialty shops that you may want to use that aren't on Class Wallet and it might be because the technology is an obstacle, or perhaps it's a smaller shop.

24:59
And they just don't want to do the technology work that it would take to integrate their online shopping with the Class Wallet platform, or maybe they just haven't been asked.

25:11
But, regardless, these curriculum providers, we're going to approach in the next few months and offer them an option to register for you, to make purchases there. And we will treat them as a provider, which gives us a little more flexibility. They won't need to be a shop on the platform.

25:30
So, without going into too much detail, the goal is to have more options for you, and for you to have an easier way to get your preferred shops, your preferred curriculum providers, have them be available to you.

25:47
So, internally, when the team is talking about this, we've talked about Class Wallet it is sort of like the in network. And these businesses that we're going to register like an out of network, they're sort of separate from the platform, off platform providers. And they're essentially stores that aren't otherwise registered on Class Wallet. So, that's taking a little bit to work through the legal implications to fix the portal and to have the processes ready, but we do think it'll be ready by September.

26:18
The first three items on the bulleted list are general provider improvements so we recognize that your providers, are just businesspeople there.

26:31
Your Sylvan, your speech language therapists are just people providing a service and they don't need any extra hassle in their lives. We have a new provider portal that is a little easier for them

to navigate, so that they have to take these steps, but we've made it as simple as possible and as straightforward as possible.

26:56

Now, this new provider portal will also result in a searchable list for you, so a provider only has to register once.

27:05

If you're in an area where there are other ESA Plus students, chances are, your providers may already be registered because they've already registered in order to serve existing students.

27:15

So, you need a list, in order to know whether you even have to ask the provider to go through this process.

27:23

And so, we wanted a searchable list for you to be able to find who's already registered, And currently, we provide a list, we do. But it's a little clunky, and we know that, so that searchable list is coming soon.

27:35

Then, there's some internal process improvements that we're making. They're boring, the details don't matter as much, but we were operating an ESA program with about 300 students, less than a year ago.

27:48

So this fall we expect to have about 4000 students.

27:51

A lot of students, and it's a big change.

27:54

And we can't sustainably run particularly the provider process in the same way we have. So, just know that we recognize that, and we're taking steps already to improve that.

28:10

So, I've talked a little bit about the providers. I know the team has talked to you about this already, but I wanted to mention, again, that North Carolina law governs this program. So, we don't make up any steps or requirements that we wouldn't have to.

28:28

So, we are simply implementing the program as the law directs us to do, and that includes a requirement that providers have to be qualified. So, we're going to make it as easy as we can. We've defined qualified enough online, if you wanted to say, well, what does that mean, qualified? You can see that it's a short passage, a page explanation of what qualifies a tutor, what qualifies a therapist.

28:55

We register providers because we need to comply with the law, there'd be no other way for us to document that we are complying with that requirement and we also don't want you to have to submit every single time. We don't want to look at a qualification over and over again. We want to register them, so it's done.

29:13
It's done, they're set, they can serve you or serve other ESA Plus students and we're all complying with the law.

29:20
So, these enhancements that I've spoken of are basically trying to make that registration process as easy as possible, and to make it easy for you to know whether you're dealing with a brand new provider and you're going to need to facilitate their registration. Because typically the family says to the provider, hey, you know, I have this funding, I'm doing this program, and here's what you need to do. I only need to do it once.

29:45
So, we kind of count on the families to help a little bit with that, to get the providers registered.

29:51
So, hopefully, these enhancements make it easier for those professionals who are serving you, and also, more helpful for you, as you manage the people that are helping you with your student.

30:07
So that's a little bit of a sneak peek about what's coming soon.

30:11
I think the team probably mentioned already that we expect to do another session, everything in steps.

30:20
So as these enhancements are coming online, as your funding becomes real to you and settles into your Class Wallet account, we'll be ready to talk again about ongoing details and your questions will help guide that for us.

30:36
Tiffany, if you want to advance to the last slide, we can.

30:41
Say our final comments, if you have any.

30:50
This events page is on our website.

30:54
You can just go to the ESA page where you've been before, and it says, events, and that's where you want to go. I want to point out that these first four or five that we've already done are available.

31:06
You can go and watch a recording, you can download the script, you can look at it a variety of ways. So, when you get to the events page, it shows the upcoming one by default. But, you can use the little arrow to the left, to go backwards in time.

31:25
And when you see those other sessions that we hosted on June the eighth, the 15th and so forth, you can watch the entire recording as if you had been there live. You can download the material, or read the script, so those things are on there. It takes about a week, 10 days to get on there, so I don't believe we have July sixth there yet.

31:48
So, that will be there soon.

31:50
And then, we have two more sessions. You may or may not be interested in July 20th, which next week is about dual enrolled students, who are a small percentage of our award population.

32:00
But, you probably will be interested in July 27th because we have heard a lot from families over the years that it's hard to manage summer.

32:13
And if you're a home school, you don't have quite the same schedule as a school that starts August the 20th and ends on May the 30th. But, yet, this program is a school calendar program.

32:25
And so, it's not designed in an immediately helpful way to families who home school.

32:33
But we have some strategies that we can share with you.

32:37
So, as you are involved in the program, and you're planning ahead for summer 2023, we'll show you some of the things we've thought of, and we'll also hear from you about how you need information in order to use the program.

32:53
That's all I have, and I'm very glad to have been here to be part of the presentation.

33:02
[Tiffany] Can you hear me?

33:04
[Kathryn] Yes.

33:06
[Tiffany] OK, I apologize, I think at the beginning of the presentation, the group could not hear me very well.

33:13
I don't know, it seems fine on my end, but there were a lot of messages coming in that I was going in and out, so I apologize for that.

33:19
I hope that didn't affect the presentation too much.

33:24
But, yes, we do plan on doing another presentation after funds have disbursed.

33:31
Kathryn, I think we've got several questions about particular providers, which we mentioned with the enhancements that are coming, particularly for our product providers.

33:42

We should have a path for you to be able to access curriculum from the product providers that you're used to, as well.

33:52

[Kathryn] Right. And I would say that the new portal is going to have two options. So, essentially, our product providers are going to use that same portal as a tutor or therapist.

34:03

However, it'll say, are you selling curriculum or are you providing a service, and then there'll be these two paths, for the providers. And I wanted to reiterate, that the provider, the product provider, the curricular provider, that person has to register. So they do have to be willing to take a step.

34:21

It's not nearly as much of a step as linking their online shopping through the Class Wallet platform, which is daunting, perhaps, for a company.

34:33

But it is a step, and they will need to sign an agreement. And we don't think it's a big obstacle. But I did want to be clear that the product provider has to agree to register. We're responsible for certain guardrails around the program.

34:51

And one of them is this idea of registering providers.

34:57

But we think it'll be straightforward, and I don't expect a company would find it hard to do, so we're looking forward to registering them.

35:11

Is there anything else team that you wanted to address? We did have a couple of minutes. If there's something you wanted me to speak to, I can.

35:32

[Tiffany] I think we've already talked about it. I see a couple of questions about specific product providers.

35:38

We're working on enhancements for private providers.

35:43

[Kathryn] So, it's not ready yet, right. We aren't ready to say this is what they'll do.

35:48

It will be similar to your tutors and therapists to register.

35:54

So, I see some questions about, you know, technology and other things. So, please go to the website because there is really a solid document that explains technology. So, if you've got questions about laptops and software and assistive devices, it's laid out pretty clearly.

36:13

You can get to it a couple of ways, but the forms and resources, that section that says forms and resources, under ESA Plus, it says, Technology Information, and you'll want that.

36:27

[Tiffany] Kathryn, I see a question about PE. Unfortunately, the law governing the program, as far as qualified expenses, you can only pay for courses. So your English, math, science, social studies, there are certain academic subjects that are pretty specifically laid out.

36:51

[Kathryn] We have determined that you can use your funds for foreign language, but the funds don't stretch to cover music lessons, or arts types of things.

37:12

So, why don't we close, Tiffany? I see some questions about timing, so maybe I can run through that a little bit if it would be helpful.

37:24

Just because, for example, new students, if you're brand new and you were awarded, we're very glad that you're here. But you aren't going to have access to Class Wallet until you have money. And so the money won't come until the end of August. So that's when you'll connect with Class Wallet. It'll be a bit of a learning curve, so take a breath, and be patient, because you do have to navigate, it's not hard, but you need to navigate their platform.

37:51

They are a friendly, customer service oriented partner, and they will help you create a login so that you'll go in and you'll have an account, you'll transfer money, you'll shop, as Amber showed you with the Class Wallet steps.

38:10

And then, you can always come back to this webinar, when you're faced with the actual stuff, then you can side-by-side have what it is you're supposed to do, and we'll have another webinar at that point I suspect, to go into some more detail, because some of the questions here are pretty detailed, but that's where the important stuff is in the detail.

38:36

I saw another question, Tiffany, that it bears repeating that you cannot purchase at a brick and mortar store.

38:43

You cannot do that and expect to be reimbursed if the cost does not reimburse families.

38:49

And if you're coming from the Disabilities Grant program, you were used to that, and I would understand how you would perhaps just kind of roll along, but you want to be sure to understand the Disabilities Grant program has ended.

39:01

The school year just ended. But, going forward, reimbursement is not an option, So we need for you to shop on Class Wallet.

39:12
There's lots and lots of opportunities. Our ESA program has functioned really well since 2018 with, you know, a few hundred families who have shopped and gotten their technology and ordered their curriculum, and I think with these enhancements, I think you'll be rolling along.

39:34
[Tiffany] Right. And just a reminder to the group as well with reimbursement not being available for you all to just remember, a parent mentioned something about Class Wallet won't reimburse. Class Wallet is just the electronic platform that we use to process your orders and invoices. It's the ESA Plus program that approves or rejects.

39:55
So, as Kathryn said, don't go outside of Class Wallet and go to a brick and mortar store and buy something because if you do, ESA Plus staff, not Class Wallet, will have to reject the item.

40:08
[Kathryn] So, back to the timing for a second. So, we assume that most of the people in the audience today are home school families or families who plan to home-school. If you do not have a school that you're paying, you're not paying tuition to a school. And, you're a home school, well, your funding should be in Class Wallet by the end of August.

40:28
If your school needs to be paid first, it will be early September, It shouldn't be the end of September, but we will pay your school, and then we'll turn right around and send the difference that you might, if there is a difference that you might use, we'll send that to Class Wallet and you'll be able to access that through the semester for tutoring, or technology, or whatever.

40:49
Obviously, if your entire, all semester award is absorbed by the cost of tuition, then you won't interact with Class Wallet. Hopefully you haven't stuck around this whole webinar only to find out that you don't interact with Class Wallet if your tuition cost takes your entire award.

41:09
So depending on the cost of the school, you will either not interact with Class Wallet at all or you'll have a slight delay beyond the home school families while we pay your school.

41:22
And we're going to work with the schools, we'll work with you all to make sure that happens sufficiently because there are a lot of things that can delay the payment to a school, if a school doesn't do what they're supposed to do timely.

41:31
If the family doesn't take the steps they have to take, it can take a while, and we would not want that to happen.

41:36
So, no, there's no reason for it to, so we will work on both partners, schools and families, to make sure the payment happens timely to the school, which means, the remainder, if there is one, goes timely to Class Wallet for you.

41:51

One other question is in there about Class Wallet, and Tiffany explained that really well. Class Wallet is a functional partner. They do not make policy. They can't make a decision for you.

42:04

I also want to point out that Class Wallet serves many, many states. So they're helping other states with their ESA programs, they're helping other states with other types of things similar to this. So all of those states and all of those programs, their policies are often different.

42:20

So some of Class Wallet's information refers to things that we can't take advantage of or we can't leverage.

42:27

So you do have to be careful. If you're Googling Class Wallet. or they have a YouTube channel, if you're looking at some other materials, keep in mind that they're providing technical assistance to Arizona or Tennessee or Florida, and it's about some other program. So you'd have to be careful, and not make assumptions based on what you see there.

42:48

So that's part of the learning curve, and we will definitely get there.

42:52

And when you talk to somebody at Class Wallet, they should know the difference, and not give a North Carolina parent Arizona information.

43:01

But it's always worth remembering that the source of your information is the ESA Plus staff here in North Carolina, not this company that's providing an easy way for us to administer the program.

43:17

Their platform is unique and helpful, but policy stays here.

43:26

[Tiffany] All right.

43:27

Thank you so much, Kathryn. [Kathryn] OK. I see a couple of questions at the end. And I'm sorry, Tiffany, but I just wanted to know, we see your questions, and we've got somebody connected to that. So they're kind of unique, one-off questions. And we're working on it with you.

43:44

Thank you, Tiffany. Sorry, squeezed that in at the end.

43:48

[Tiffany] Well, again, thank you for joining us. We appreciate your patience and we'll see you next time.

43:54

[Kathryn] Appreciate it. Bye bye.