

Transcript

ESA+ Continuing Eligibility
July 6, 2022

0:04

Hello, everyone. Welcome.

0:07

We're just getting started with our Wednesday training series, so take a few minutes and make sure you can perhaps get the handouts if you'd like them. There are the presentation slides available for you.

0:24

I hope your sound is working well. And you can see the screen that says ESA Plus Continuing Eligibility.

0:34

We're going to delay just a minute or so to let everyone get in GoToWebinar.

0:43

Thank you for coming today.

1:00

All right. I'll start up again.

1:02

This is Kathryn Marker, director of the division at our state agency that administers the Opportunity Scholarship and the ESA Plus program, and I'm joined by the fabulous ESA Plus team, Michele and Tiffany and Mykayla. There are a few others not with us today, but we got the team you need this morning to help you with your questions about continuing eligibility.

1:30

I'll start by saying that the ESA Plus is what we call this program.

1:38

In law, it's known as the Education Student Accounts for Children with Disabilities Program.

1:43

ESA Plus being a little easier to say, and more memorable. That's what we're sticking with.

1:49

ESA Plus helps families afford non public schools. That is private or home schools. So this is not a program that helps families who remain full time in the public school.

2:00

In the session that we're presenting today, it's targeted to the current ESA Plus awarded students, whether they've been in one of the programs and have renewed or whether you are recently awarded.

2:15

But the information is not applicable to prospective new students, so if you're in the audience and you're thinking about the ESA Plus program, maybe for another year, you might apply, this session is not helpful to you.

2:28

The continuing eligibility that we're speaking about today is a task for students in the program, once they've been awarded, and then going forward, and we're going to explain what the timeline is and the way a family would go about documenting their continuing eligibility.

2:51

So why? Why do we need continuing eligibility?

2:55

Well, state law requires it. So our agency is the State Education Assistance Authority.

3:00

We are SEAA and we're required to confirm a student's continuing eligibility for this program at least every three years, and by continuing eligibility, we're referring to the documentation of a disability.

3:13

So, that's the continuing eligibility.

3:16

Noting that a student continues to have a documented disability every three years, and that is a requirement for the program.

3:29

So, let's talk a little bit about the cycle and what it means to update every three years.

3:34

So, the three year cycle dates initially from the eligibility determination that parents submit for their student. Says, you know, when you first apply for the program, you need to submit an IEP document, the eligibility determination. It has a meeting date, and that is the date that starts the three year cycle. So, sometimes, students join the program, they're awarded, they're using an eligibility determination from a year or two prior, which is fine. It's good for three years.

4:05

That means you don't technically have three years once you join the ESA club.

4:09

The evaluation date, that's what starts the three year cycle. If your student has been in the program for a while and you know a little bit about continuing eligibility, you may have used the other option. You may have used the Continuing Eligibility Form.

4:24

That form, if you used it as a renewal to update your evaluation, it, too, has a date on it signed by the psychologist or psychiatrist on a specific date.

4:33

And then, that date becomes the evaluation date, and the three year cycle starts over.

4:40

I'll pause for a minute and say that this information is all online.

4:45

So what we're presenting here today is available to everyone on the website.

4:50

And one of my colleagues will probably put the link in the chat, so that you know exactly what we mean, but this information is something you can find, we have a separate page for the documentation of a disability.

5:08

So let us suppose that you are under the impression, and you're not sure, should I be starting this process? What do I need to do?

5:19

Well, we've got a little chart here that does show if your student's evaluation data in 2019 or older you would have to begin your process this fall, 2022. We know it can take a while.

5:30

No matter how you go about continuing eligibility, and we recommend that you start in early fall, it will be due to our agency to the ESA Plus program by January the first, this coming January first, 2023.

5:46

If the student's evaluation date is 2020, you don't have to do it this fall.

5:51

But you would want to plan ahead to do it next fall, 2023.

5:56

So not this coming fall, but if you're from now and yours, would they do January first of 2024.

6:04

So we reach out to families of students whose documentation will be outdated, we begin reaching out to them in early October.

6:14

To say you need to get this done, it's due by January first, and there's a weekly e-mail because it's now a task that is incomplete in My Portal. So this fall, we'll be doing that.

6:27

If your student's evaluation date is 2019, then it will be outdated as of January first, and we will contact you about that this fall.

6:37

We won't contact you if your evaluation date is 2020 until next year, because it isn't technically due. But we present this information so you know, you can make some future plans.

6:51

I want to point out too that you need to look at the year. We are not dating your evaluation date from May the second or September the third, or December the fifth, it's as of the year.

7:05

So just look at the year, no matter what month your document was signed, look at the year, and that is the year that drives when we need to have an update.

7:22

So there are two ways to update. Now, this is only true for our continuing students. This is not true for our brand new students. A brand new student coming into the program does not have these two options.

7:34

But as a student who's now in the program, you have two ways that you can update your evaluation date. And again, that due date is January the first each year.

7:44

And again, I'm speaking now to the students whose evaluation is older than 2020.

7:50

If you're dated 2020 or more recent, you don't need to do it this fall, so this is just informational for you, and perhaps of planning ahead for a future year. But if you have a 2019 document, then you need to be updating this fall..

8:06

There are two ways to do that.

8:07

You can take a form that we provide to you. And actually, that was the link Michele just put in the chat.

8:14

You can take a form to a licensed psychologist or psychiatrist. There are no other options, it cannot be another type of doctor.

8:21

It can't be another type of testing official. It needs to be a psychologist licensed in North Carolina, or a psychiatrist also licensed in North Carolina. And the psychologist is by statute meant to be a psychologist who focuses on school aged children.

8:41

Now there's no certification or licensing area that designates that.

8:49

So, you'll see, when you see the form that the psychologist who signs off, has to say, I am a psychologist, Washington, State of North Carolina, and I practice with school age children. Something like that on the form.

9:05

So, I would read that form, and then take it with you, if you're going this route.

9:11

And show it to that professional, who will then make a call about whether or not he or she is qualified to sign it.

9:20

The link to the form is in the chat, and you can just go look at it, see what that person is going to have to sign off, and you can take your steps. The second option is to get an updated eligibility determination from a North Carolina public school.

9:34

That's the IEP document.

9:37

It's not the entire plan.

9:40

It's just that initial eligibility determination for public school does not need to write a plan for services.

9:50

The school just needs to document the continuing eligibility via the ecats eligibility determination form.

10:01

Let me re-iterate that there aren't other ways to do this.

10:04

You cannot use a 504 plan, you can't use a private school special education plan, you can't use medical reports.

10:12

None of those things can be submitted to update a student's evaluation. It has to be the review signed on that form from a licensed psychologist or psychiatrist or North Carolina Public school eligibility determination.

10:29

This form is linked from our website. So there's a section of our website that explains documentation of a disability.

10:37

The first part is for new students as renewals, as continuing students.

10:41

You would float past that new part and go down where it talks about renewal students, because that's where the continuing eligibility information where you see these two choices, and you'd see a link to the form that you take to the psychologist or psychiatrist.

11:00

We do not provide a list of psychologists or psychiatrists, so you'll need, if you want to do that, you would need to research that and find someone.

11:10

Many of our families are connected, maybe they've had some kind of psychological testing done, and you are connected to a clinic, that maybe your route, but we don't recommend or provide a list of who to see for that.

11:30

So what would happen if you have a delay, or you don't get started in time, and it takes longer than you think, or all of those things that can happen to delay this process?

11:41

So if your student's evaluation is due to be updated by January first and we don't have it by January first, your spring funding does not go.

11:51

Your school won't get paid.

11:53

If you're a home school family no deposits are made to Class Wallet.

11:58

When you renew in late January, which is our typical renewal time period, your student's status will be listed as ineligible.

12:09

So, if you have trouble, and it's November, it's December, and you're afraid you won't meet this timeline, you should reach out to us via e-mail so that we can advise you individually.

12:23

We do wait to pay your school. So let's say that you are able to get it by January the tenth.

12:29

We will review your document at that time, make the change to your record, and release the hold on your funding.

12:39

So, we want you to reach out to us via e-mail if you're not going to have it by January the first, because we want to make sure you're aware of the consequences of not having it updated.

12:54

And then we can also advise you. Ultimately, we need the documentation of disability, whether you are going back to the public school or using the continuing eligibility form.

13:03

We need that before the end of the school year, by June the first.

13:08

Or you would list the spring funds and there would be no way to disburse funds to Class Wallet, or to your school.

13:16

So there does come a point at which it is just far too late.

13:21

But we don't want you to even have a delay, you know, we don't want your school to be unpaid through the spring semester.

13:26

So it's to your advantage to know that this needs to be done, maybe start in September.

13:32

Certainly, when you get your e-mail in October that says, hey, your student's evaluation date needs to be updated, we need to document, then hop to and get started on a process.

13:46

As many of you know, the IEP process is lengthy. It's unpredictable.

13:51

The public schools are busy, and to get their attention is tricky, so you want to start early and get it done.

14:08

So, this is a different type of question.

14:10

Up until now, we've been talking about just updating the evaluation date.

14:17

If you believe your child's area of disability on the documentation from the public schools, if you believe that's changed.

14:27

If what we have on file is one area of disability, and you believe that your student has a different or a new area of disability, that cannot be documented through the continuing eligibility form.

14:42

You can't have a psychologist or psychiatrist update your student's area of eligibility.

14:50

If the child's area of eligibility has changed. You know, it was autism, or it was speech and language, and you believe it's something different that can only be documented through the eligibility determination from the public school IEP process.

15:07

So nothing about the areas of disability will be changed through that normal updating every three years. In order to do that, you have to have the public school documentation.

15:19

So if you've been, you know, out of the public school for a while, please know that the public schools will serve a student. You don't have to withdraw your student from your settings and re-enroll them. It's not that tumultuous of an experience.

15:40

However, maybe you don't really know the special education staff any more at the school or you're uncomfortable for other reasons about going back to the public school? It can be tricky.

15:51

I mean, we know that.

15:53

And so, we've partnered with an excellent organization that can help you.

15:59

If you have questions about initiating the special education process, about timelines, about evaluation and re-evaluation, especially if you've been out of the public school with your student for a while, I urge you to consider contacting the Exceptional Children's Assistance Center.

16:14

ECAC.

16:17

Their contact information is on our website, on that documentation of a disability page I mentioned earlier.

16:24

You could also google them, ECAC, they're a North Carolina organization that provides families with the tools, the resources, the information to help them make informed decisions about special education.

16:38

They have graciously taken upon themselves to learn about the ESA Plus program, and they served a number of our new students who were thinking about applying, and had questions about the IEP process. So they would be glad to hear from you.

16:53

They have some parent advocates that are really helpful, experienced people with the IEP process.

16:58

If you want to go back to the public school for whatever reason, either because you want to change the area of disability or just because that seems to be the most effective route for you, then please consider contacting ECAC, which I should say their services are provided at no cost.

17:16

And I also want to point out that ECAC can only help families with navigating the process. They can't make the public school do anything.

17:23

And they don't evaluate students themselves.

17:26

They are just navigators. They're experienced parents who can help with the special education process.

17:34

They can't speed it up or make the public school do anything.

17:42

We're almost finished with our presentation today, actually, but there's one other comment I wanted to make about the two options. So I'm going backwards to the slide that showed the two options.

17:52

And, again, this is just to update the evaluation data for routine, every three year cycle, I'm going to update for, what does the law require.

18:03

So these two things, a review from a licensed psychologist or psychiatrist might cost money.

18:09

So that's a cost that you would have to incur.

18:13

I will say that if you have the funds available in your ESA Plus account, then you can use ESA Plus funds for that cost.

18:24

So, as you know, ESA Plus will pay for your non public school tuition.

18:33

And then it will also pay for other qualified expenses.

18:36

So, if you have the funding available for other qualified expenses, you can use it to pay for the review that it will take to do this updated evaluation.

18:55

The updated eligibility determination from a North Carolina Public School doesn't cost anything. As you know, public schools are charged with serving the students in their service area.

19:05

And there isn't a charge to you to go back to the public school and request that your student be evaluated or re-evaluated.

19:17

We talked about the delays in payment, if you don't have this done by January the first.

19:23

And it will certainly be stressful in the early spring, as you don't have this.

19:28

No, you don't have access to funds, so you would not want that to happen. If you let it go too long in the spring, then, it becomes possible to update.

19:36

Your student is not eligible to renew, and your spring funding is forfeited.

19:43

So, again, we try to work with families because we know it can be difficult to get back to the public school once you're not in the public school.

19:52

But there does come a point in the spring semester where it's too late.

20:00

And then just as a reminder, that this updating of an area of disability cannot be done by seeing a licensed psychologist or psychiatrist.

20:13

The only way to update the primary or secondary area of disability for current students is through the public school eligibility determination.

20:23

That's the only way you can change the primary or secondary area of disability.

20:34

So we have reached the end of the presentation material.

20:37

We'll stay on the line for a few minutes and answer some questions, and maybe there'll be some things that are helpful to the audience at large.

20:46

We will try to stick to the questions that relate to the continuing eligibility.

20:52

Please look here. The other sessions that we have planned for the rest of July are listed here. I hope you'll consider joining us for those who have questions about any of those topics.

21:05

And you can get to the sessions that were held in June, if you missed them, and want to go back.

21:10

The recordings are available, and you can also access the script, so, the PowerPoint and script.

21:20

So, and I re-iterate that you can go right now if you want.

21:25

Those of you on the line right now can go to the handout section in GoToWebinar, and there is a PDF copy of this presentation, and then a PowerPoint copy.

21:35

Either one has the speaker notes, which is intended to be sort of the detailed guide. So, the speaker notes contain the information that I was able to share with you today.

21:50

I'll pause for a minute and ask my colleagues if there's a real topic of concern that I didn't address about continuing eligibility. Or if I can say it again because this is confusing, and the dates, and applying the three year cycle can be tricky.

22:06

I'm glad to explain again.

22:16

One thing I didn't mention is that you may have an updated document off cycle.

22:21

So you may not have to have an updated document, but you've got one for some other reason. Maybe you're going to be seeing a licensed psychologist or psychiatrist anyway, and you just take the form.

22:34

That's fine. You can update your date early.

22:37

You will need to e-mail us to let us know, because there's no way for you to send it to us until we assign you the task.

22:44

We do that to everyone in the early fall, who is required to do it by January first.

22:51

But if you aren't technically required, but you have one, you know, in the summer, send an e-mail that says, I have an updated documentation of a disability.

23:02

And can I submit it, and then our team will put a task, and you can go upload your document.

23:14

Well, I see a couple of questions about how you will know what the date of your evaluation is. Let's say you've been in ESA Plus for a year or two. You know, is mine 2019, 2020? So, unfortunately, that's not visible to you in My Portal, I wish it were.

23:29

I wish we could just put the date out there, and then that way, you could periodically check, because you know, you kinda forget, if you applied a year ago.

23:37

If you're not sure what document you submitted to us, or what date it had on it, then you'll just have to e-mail us, I'm sorry about that.

23:46

I'm sorry, for a little bit of a hustle for you. And we have a lot of e-mail. We work as hard as we can to get answers to you, but it can take a few days..

23:56

The good thing is, have a staff member glance at your record and say, well, the date is 2020 or whatever. That's easy.

24:06

We will try to be quick with that easy question.

24:17

So a couple of questions about paying for the evaluation.

24:20

You can use your ESA Plus funds to pay the cost of the psychologist or psychiatrist. They may need to do testing. They may not feel qualified to sign the form without doing some sort of evaluation of your student.

24:35

That cost can be paid out of ESA Plus, which means paying for it out of Class Wallet

24:40

So that person would need to be a registered provider. I didn't say that earlier, and that's important.

24:46

So you may, if you work with a psychologist or psychiatrist, you may want to connect them to our provider process, because they need to be looked at, as a provider.

24:55

So there's a little bit of a paperwork step that that person has to take.

25:01

We are working particularly hard on the provider registration process, and it hasn't been difficult. But we want to make it even more streamlined and easy.

25:10

So going forward we would not like the professionals you're dealing with to have any hassles.

25:16

And that is something they would have to do.

25:18

They would have to be approved as a provider, which would be through us, and then they would have to link their bank account to accept an electronic transfer from Class Wallet.

25:32

Would be all good steps, so that you can, especially if your student routinely sees someone like that, a clinic like that, you would want that clinic to be registered as a qualified provider.

25:45

And that's what would have to happen in order to use your ESA Plus funds to pay that provider.

26:02

I'm hoping that our providers, particularly these professionals, or also the speech therapists and so forth, the more familiar they are with the program, I hope that they, and the better the program, makes the process for them.

26:16

I hope that we can enter into a point where it's pretty streamlined for them, and that they understand the program and how it works so that they can accommodate the timing of the payment.

26:28

Because I understand, you have to be able to submit an invoice from them, and then a day or two later, all stores are online that they get paid.

26:40

Which, you know, may not be their normal way of doing things, but it's not unlike insurance.

26:46

So if we can get them to understand the state is operating this program, and it's solid, and the routines and the processes are good, I think, I hope that you will find your providers are amenable to working with you.

27:06

The bigger the program gets, the more likely that is, because there are more students and more providers are becoming familiar.

27:18

Question about if you have an evaluation off cycle.

27:22

Yes.

27:22

If you have one already, and, you know it's more recent than whatever we have on file, reach out via e-mail as an updated continuing eligibility. Then we put the link to My Portal.

27:38

Submitted to us. Keeping in mind, we don't want the evaluation itself, right?

27:43

We don't want the testing. We don't want the documentation from the psychologists or psychiatrists that define our form.

27:50

So, which if you've had the evaluation, you probably can, I would imagine, submit it to their office.

27:56

You wouldn't have to make another appointment and they one of those things where they would have to sign this particular form and that's what you submit.

28:04

We don't maintain expertise and the review of psychoeducational records and that sort of thing.

28:11

We're relying on the professional to document what the law requires.

28:18

So the two things that you can submit for continuing eligibility is either that form, we call it the continuing eligibility form, or the ECATS Eligibility Determination from a North Carolina Public School. Those are the two options.

28:33

We do have a list of providers. Somebody's asking if we maintain a list of providers, we do.

28:38

So you could look on there, and again, I urge your patience and you may be tired of hearing me say just hang in there, because, as I said, we're working hard on this provider process. There is a list online.

28:52

It can be a little tricky because it has grown so large, now we went from a program of about 300 students less than a year ago to several thousand this fall. There are a lot of new providers, and our provider process isn't as easy, but there is a list.

29:08

And you can look at it, it's just not as user friendly as we would like.

29:13

And we are on the cusp of providing a more searchable database of providers. Now we don't go out and find them.

29:23

We register them as families, need them, and then, we don't want that provider to have to do it again, so we provide a list. So, that's the only purpose of a list.

29:33

So, we're not going out and finding providers for you.

29:38

We just start providing the list as a courtesy so that you may know that someone in your area is already registered, which would facilitate matters.

29:51

So, again, we don't provide a list of psychologists or psychiatrists, but as many are, if a psychologist or psychiatrist is already registered on behalf of some other family, that person is listed on the provider list.

30:09

Thank you, Mykala, she had put in a link to that so that you can go look at it.

30:15

And again, I'll just take a minute to put in a plug for, we are planning to offer some training to providers, which will be a recorded how to. Families may want to access it.

30:27

You know, it's hard to reach our potential providers out in the universe of professionals, but we do plan to beef up our information to them. We want it to be easy.

30:39

But there are just a couple of steps which there's only so much we can do to remove the roadblocks.

30:44

So a provider has to be willing to take a few steps, and we're going to have some information for those providers in August.

30:52

And I expect by then, our provider portal, where they interact with us, will have gone through its upgrade as well, which will mean the list that we are able to provide is easier to use.

31:10

It looks like there might have been a dash at the end of the link. So if you're looking at that link that Mykayla put out, dot PDF is the end of the link.

31:21

Also, you know, please familiarize yourself with the website, because all these documents are on the website, and you want to know where they are.

31:28

Because you'll find it today, and then, six months from now, you might want it again, and you want to know how to navigate. The website has been upgraded a year or more ago, and it's really user friendly.

31:41

So there's a whole page about documentation of a disability.

31:44

There's forms and resources, which are a lot of the miscellaneous documents you know you need.

31:50

And you just want to be familiar with all that stuff.

31:59

Somebody's got a really nice thank you on there.

32:02

We appreciate it.

32:03

Thank you for being positive.

32:07

We're coming into what we hope will be a really good year for ESA Plus.

32:12

It was busy this past spring, a lot of new families, and plenty of confusion to go around, some processes that weren't quite robust enough for an influx of students, but we made it through.

32:25

And now, we're looking forward to the New Year.

32:38

Anything else?

32:40

Team?

33:03

OK, well, I think we have accomplished our mission for today, which was to explain the continuing eligibility. Take the PowerPoint with you.

33:12

It's one of the handouts because with the speaker notes then you can have a super quick reference, Even though this training was only 30 minutes, you may not want to listen to it all again. To find out one piece of information. So do that.

33:25

Familiarize yourself with the website, and I hope we'll see you next week.

33:29

We've been working hard on the session that we have planned for the qualified expenses, which will include a little bit about providers, but mainly it's about shopping on Class Wallet.

33:39

Our home-school families will benefit, particularly from this.

33:42

Although some of you who are enrolled in the school, but whose tuition will not absorb the entire award amount, you may also be using your funds for providers or purchases. That's next week.

33:57

And then you can see we've got a couple more, I hope to see you, then. Thank you for coming today.