Navigating Two Programs: Opportunity Scholarship and ESA+

North Carolina’s ESA+ Scholarship Program
Helpful Hints for Zoom

Slides are already posted at https://www.ncseaa.edu/esa-family-trainings/ and a recording of this session will be posted there within a week.

- Zoom has closed captioning available

**Asking Questions**
- Use the Q & A to ask your questions (chat is disabled)
- Email ESA@ncseaa.edu to ask questions about an individual student

**Answering Questions**
- Presentation team will answer questions from the Q & A at certain points
- Only questions related to this session’s content will be addressed live
Agenda

Parents of students with awards for both K12 Scholarship Programs have unique challenges. Let us help!

1. Options in each program
2. Differences between ESA+ and Opportunity Scholarship
3. How the $$ flows (and when)
4. School Transfers
Program Options
Two Separate Programs

• **The Education Student Accounts (ESA+)** is a program for students with disabilities to attend a nonpublic school (home schools are eligible)

• **The Opportunity Scholarship** is an income-based program for students to attend a nonpublic school (home schools are not eligible)
What is a Nonpublic School?

Public Schools

- Traditional Public Schools
- Magnet Schools
- Charter Schools

Nonpublic Schools

- Private Schools
- Home Schools
Program Differences
Program Differences: School Choice Options

Opportunity Scholarship
The school choice must be a K12 Direct Payment School

ESA+
• May attend a home school
• The nonpublic school can be a K12 Direct Payment School or an ESA+ Reimbursement School

PART-TIME ENROLLMENT
Students who co-enroll in ... will receive...
• Two private schools: regular award Opportunity / ESA+
• Private school and public school: 50% of the award Opportunity / ESA+
• Private school and home school: regular award ESA+ only

Home School or Reimbursement School option is available for the ESA+ Program, but not for the Opportunity Scholarship
School Choice for Dual Award Students

REMEMBER

Students who will benefit from both the Opportunity Scholarship and ESA+ ...

• must be enrolled in a Direct Payment School, and
• if part-time, can’t be co-enrolled in home school.
Program Differences: Award Amounts

Opportunity Scholarship

• SEAA will pay schools on behalf of the student recipients

• Up to $6,492 (full time, per school year)

ESA+

• SEAA will pay schools on behalf of the student recipients

Funds remaining after tuition is paid go into an electronic account in Class Wallet for parents to use for Allowable Expenses other than tuition and fees.

• Up to $9,000 (full time, per school year)

Students with certain designated primary or secondary disabilities may be eligible for up to $17,000 per full-time nonpublic school student per year.
Program Funds
Payment to a school is **program-specific**:

- Opportunity and ESA+ disburse funds directly to schools on behalf of students.
- Schools complete Certification just once per year even if the student has more than one program award. Schools and parents endorse via [MyPortal](#) for each program award, each semester.
ESA+: Remaining funds to ClassWallet

After tuition and fees are paid
If your school’s reported costs are less than your award amounts combined, the remaining ESA+ award funds will move each semester to ClassWallet for you to use for other Allowable Expenses.

TIMING: If your school is efficient with Certification, and your school and you are both efficient with Endorsement, fall funds will be in ClassWallet by mid-September, and spring funds by early February.
What is ClassWallet?

• a separate company that SEAA contracts with

• an online platform that hosts the **electronic account** on behalf of the ESA+ Program

• where ESA+ families use scholarship funds to:
  → make a payment to a service provider
  → purchase products that are ESA+ Allowable Expenses
ESA+: Other Allowable Expenses

Allowable Expenses

What Can I Pay for with ESA+ Funds?
Families can use their ESA+ funds to pay for:

- Tuition and fees for a private school
- Certain services related to educating a child with disabilities
- Certain products related to educating a child with disabilities, including curricula and textbooks.
  - Curricula and textbook purchases must be related to one of the following academic subjects: math, science, English/language arts, social sciences, or foreign languages.

Products and services must be purchased through the ClassWallet platform.

Allowable Expenses

- ✔️ Tuition and Fees
- ✔️ Tutoring
- ✔️ Educational Therapy
- ✔️ Curricula
- ✔️ Educational Technology
- ✔️ Transportation — ESA+ funds may be used for transportation to/from educational services or activities. Visit the Search for a Provider portal and enter the search term “transportation” to see a list of registered providers.
- ✔️ Textbooks — Must be required by a nonpublic school and related to one of the following academic subjects: math, science, English/language arts, social studies, or foreign languages.

These topics are links to explanations about WHICH expenses are allowable, and HOW parents pay for them

https://www.ncseaa.edu/k12/esa/8617-2/ (or select “Allowable Expenses” from the left side navigation)
Reminder!

ESA+ students are required to use at least $1,000 of their award funds by the end of the school year in order to be eligible for renewing the following year.

This requirement is met by using at least $1,000 for tuition, ClassWallet expenses, or a combination of both.
When endorsing each semester, check to see how much of the tuition is paid for with ESA+ funds

- Pay special attention if Opportunity Scholarship covers all or most of your tuition.
- If ESA+ pays less than $500 each semester, you will need to use funds for other allowable expenses in ClassWallet to reach the minimum amount of $1,000.
School Transfers
School Transfers

• Award funds from the K12 Programs can be sent to a maximum of **two** schools per semester.

• The amount of funds that can be paid to a 2\textsuperscript{nd} school in a semester depends on how long the student attended the 1\textsuperscript{st} school.

To calculate the amount of Opportunity Scholarship and ESA+ funds your student can take to the 2\textsuperscript{nd} school, see the chart and explanations under “How To Transfer Schools” [https://www.ncseaa.edu/k12/k12-forms-resources/](https://www.ncseaa.edu/k12/k12-forms-resources/)
School Transfers: *complications for dual award recipients*

- After the school payment disbursement, any remaining **ESA+ funds** will be transferred to the ESA+ student’s ClassWallet account.

- In ClassWallet, ESA+ students may use remaining funds for **other Qualified Expenses**.

**Tip:** *If you spend your ESA+ funds from ClassWallet, and then transfer to another school, you will not have ESA+ funds from the semester to apply at the new school.*

**The best time to transfer is between semesters.**
Parents should check MyPortal once a week:
• Are there items on the To Do list?
• Look at Notifications. Maybe you’ve missed an email!

ESA+ students need updated documentation of a disability every 3 years (3 years from the evaluation date on file).

HOWEVER: Parents, you will renew annually so that the ESA+ staff know you want your student to continue next year.

ESA+ is not a reimbursement program.
• Very few exceptions (mainly reimbursement for tuition and fees if attending an ESA+ Reimbursement School)
• Do not purchase items or pay for services with the intent to submit a receipt.

Public School? If a student will be in the public school, full-time, as normally assigned, then they are not eligible for ESA+. 

➢ ESA+ is not permitted to provide funds to students who are enrolled in their regular public school (including charter schools).
Summer Training for ESA+ Families

https://www.ncseaa.edu/esa-family-trainings/

Enrollment Options, Updating the Area of Disability, ESA+ Reimbursement Schools, Purchasing Curriculum, Planning for Summer Expenses, Continuing Eligibility, and more …

Register to attend live sessions or view recordings at your convenience.

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