ESA+ Fall Check In

November 3, 2023
Helpful Hints for Zoom

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

Note that Zoom has **closed captioning** available.

**Asking Questions**
- Use the Q & A to ask your questions (chat is disabled)
- Email [ESA@ncseaa.edu](mailto: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

- Payment process
- Transfer process
- Allowable expenses
- Updated eligibility determination
- Tax Implications
ClassWallet Accounts

**Direct Payment School** *(First, SEAA sends ESA+ funds directly to the school on behalf of the student)*

Then, are there funds remaining after tuition and fees are paid?

- **NO**
- **YES** *(remaining funds go to ClassWallet)*

**Timing:** If school & parents are timely with steps, tuition is paid in early September and remaining funds go to ClassWallet by mid-September. Process repeats in January for spring.

**ESA+ Reimbursement Schools & Home Schools**

_all funds go to ClassWallet, at the beginning of each semester_

**Note:** If ESA+ pays for tuition and fees at your Direct Payment School with nothing left over, you won’t interact with ClassWallet.
Families who attend ESA+ Reimbursement Schools should submit a tuition receipt at the end of the semester. ESA+ will email families when it’s time to upload a receipt.
Transfer Process (when transferring *during* the school year)

When a parent selects the Student Transfer Form in MyPortal, they will indicate:

(a) whether the student is withdrawing completely from the ESA+ Program, or
(b) is transferring from one school choice to another, and
(c) the first date of attendance at the new school if transferring.
What Is Allowable?

Purchases must meet the requirements for ESA+ allowable expenses. See the allowable expenses section of the ESA+ website for additional information on each category.

1. Tuition and Fees
2. Tutoring
3. Educational Therapy
4. Curricula
5. Educational Technology
6. Transportation
7. Textbooks
8. Standardized Tests (typically only home school students; Direct Payment Schools are responsible for required testing at schools)
State law requires the North Carolina State Education Assistance Authority (NCSEAA) to confirm a student’s **continuing eligibility** for the ESA+ Program at least every three years.
In mid-October, the Continuing Eligibility task was added to records in MyPortal for students with a 2020 evaluation on file.

The updated document is due by **January 1, 2024**.
Continuing Eligibility Process

- Return to the public school for a re-evaluation via the IEP team process (A full IEP is not required. Seek an updated Eligibility Determination).

OR

- Have a psychologist or psychiatrist sign the Continuing Eligibility Form

*Cannot use if:
  - Student’s only area of disability is Developmental Delay
  - Parent wants to update the student’s area of disability
How to Submit Continuing Eligibility Documents

Checking/Completing Required Actions
You can upload requested documents using the “To Do List” section of your MyPortal account.

Step 1: Log onto your MyPortal account
Step 2: Go to the “To Do List” section
Step 3: Click on the upload link under the “Action Items” column

<table>
<thead>
<tr>
<th>Student:</th>
<th>Application or Required Documentation</th>
<th>Receipt Date</th>
<th>Action Items</th>
<th>Due By</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEC3 Eligibility Determination Form</td>
<td>[Image of upload link]</td>
<td></td>
<td>[Image of upload link]</td>
<td></td>
</tr>
</tbody>
</table>

Step 4: Click Choose File to search your computer and select a document.

MyPortal allows one document to be uploaded per application.
Before uploading, be sure all required pages are saved to one file.
The following file types are allowed: .pdf and .docx. The maximum file size allowed is 10M.

Select file to upload: [Choose File] No file chosen

File name: [File name] 

MyPortal only accepts Word/PDF files. Only one document can be uploaded into the system per task. Combine documents into one file using Adobe Acrobat or an online PDF joiner – [pdfjoiner.com]

Step 5: Click “Upload File” to submit the document.

Step 6: If the file has successfully uploaded, the following message will appear:

Your document has been uploaded successfully.

See page 6 of the MyPortal Guide for Parents:

What Happens if Continuing Eligibility is not Updated?

If your student’s documentation of a disability is due to be updated by January 1, 2024, and you have not submitted it in MyPortal by then ...

- Your school will not be paid for spring 2024.
- No spring deposit will be made to ClassWallet.
- You can’t use any existing funds in ClassWallet.
- Student’s renewal status for 24-25 will be ineligible.

Reach out to ESA+ Program staff ASAP regarding your timeline if you are worried about a delay past January 1.
Need Help with Continuing Eligibility?

https://www.ecac-parentcenter.org/

Phone:
1-800-962-6817
Tax Implications

Our state agency is **required to report** to the IRS your ESA+ funds spent for anything other than tuition and fees.

Whether or not ESA+ funds are taxable income is a **different question**.

In January, ESA+ parents receive a 1099-G for funds spent in the prior calendar year.
- Under $600 not reported
- Tuition and fees not reported
- Report includes funds spent *(not funds deposited to your Wallet account)*

IRS Form W-9 is required for parents of new students. The form comes to you via DocuSign.
2023 Training for ESA+ Families

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

Enrollment Options, Updating the Area of Disability, ESA+ Reimbursement Schools, Purchasing Curriculum, Continuing Eligibility, and more ...

View recordings at your convenience.

Coming up December 1st: “How to Plan for Summer Expenses”

Register:
https://zoom.us/webinar/register/WN_fHyPEnJbQbS79cXwU7p6Mw