

ESA+ Fall Check In

November 3, 2023

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.

Note that Zoom has **closed captioning** available

Asking Questions

- Use the Q & A to ask your questions (chat is disabled)
- Email <u>ESA@ncseaa.edu</u> 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.





Payment Process – ESA+ Reimbursement Schools

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)

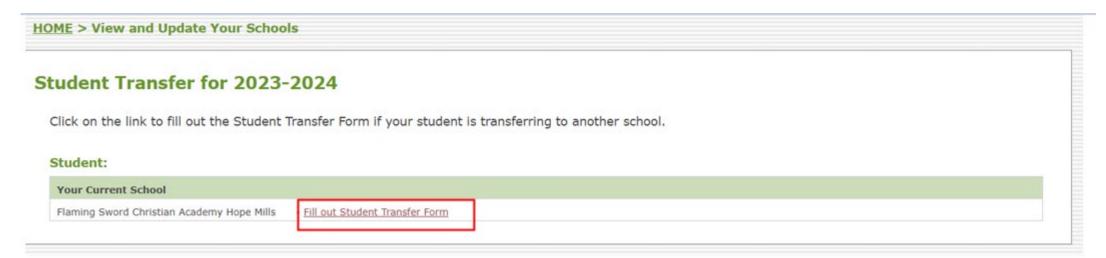
Welcome to MyPortal

Use My Portal to manage your college financial aid and K12 grants and scholarships for K12 dependents.

- To Do List
- Applications and Renewals for K-12th Grade
- Applications and Renewals for College
- School Choice
- Eligibility and Award Information
- Notifications
- My Contact Information
- My Profile

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.





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What Is Allowable?

Purchases must meet the requirements for ESA+ allowable expenses. See the <u>allowable expenses</u> 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)



Continuing Eligibility

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.



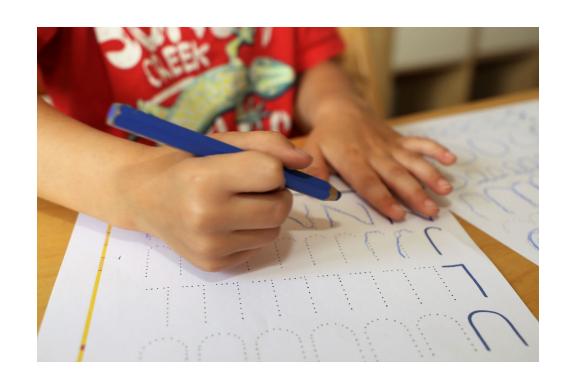




Families with a 2020 Eligibility Determination on File

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

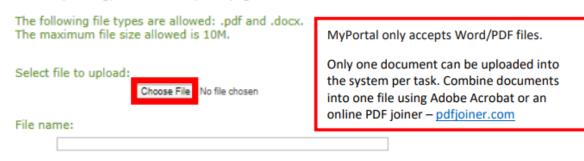
Step 3: Click on the upload link under the "Action Items" column



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.



Step 5: Click "Upload File" to submit the document.

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

Upload File

Your document has been uploaded successfully.

See page 6 of the *MyPortal Guide for Parents*:

https://www.ncs eaa.edu/wpcontent/uploads /sites/1171/202 0/11/MyPortal-Guide-for-ParentsPDF.pdf

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?



Empowering Families * Improving Lives

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

Phone:

1-800-962-6817





Tax Implications

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

Whether or not ESA+ funds are taxable income is a <u>different</u> 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.



CONTACT US



ncseaa.edu



ESA@ncseaa.edu



855-330-3955

Monday-Thursday: 8am-6pm

Friday: 8am-5pm

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 fHyP EnJbQbS79cXwU7p6Mw

