



# ESA+ Fall Check In

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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 [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.*

# 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.

[HOME](#) > [View and Update Your Schools](#)

## Student Transfer for 2023-2024

Click on the link to fill out the Student Transfer Form if your student is transferring to another school.

### Student:

Your Current School

Flaming Sword Christian Academy Hope Mills

[Fill out Student Transfer Form](#)

# 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)*

# 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

Student: [REDACTED]

Application or Required Documentation	Receipt Date	Action Items	Due By
<input type="checkbox"/> DEC3 Eligibility Determination Form		<a href="#">Upload DEC3 Eligibility Determination Form</a>	

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:

No file chosen

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](http://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*:

<https://www.ncseaa.edu/wp-content/uploads/sites/1171/2020/11/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?



<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.

# CONTACT US



**ncseaa.edu**



**[ESA@ncseaa.edu](mailto: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 1<sup>st</sup>: “How to Plan for Summer Expenses”**

Register:

[https://zoom.us/webinar/register/WN\\_fHyPEnJbQbS79cXwU7p6Mw](https://zoom.us/webinar/register/WN_fHyPEnJbQbS79cXwU7p6Mw)