



Plan for Summer Expenses

North Carolina's ESA+ Scholarship Program

Welcome to Plan for Summer Expenses

Helpful Hints for Zoom

*Slides are already posted at [ESA+ Family Trainings - NCSEAA](#) 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

Considerations:

Timing and Availability of Funds

Remaining Funds?

Students who attend a nonpublic school:

- May have funds remaining to use for summer expenses after ESA+ has paid fall and spring tuition.

Students who attend a home school:

- May have funds remaining to use for summer expenses after making purchases and paying approved providers throughout the school year.

Note: If a student's ESA+ funds all go toward tuition, or if a parent with a home school spends the annual amount through the year, there will not be 2023-24 funds left to use for summer expenses!

Things to consider when thinking about using funds for summer 2024:



- Remaining funds
- Timing
- Use of funds

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



ClassWallet access: *timing considerations*



Each summer, ESA+ access to ClassWallet will shut down (for fiscal-year-end reporting) for several weeks beginning in mid-June.

Plan to make final purchases for the year before June 3!

Tip: If you try to make a purchase at the last minute, you won't have time to re-order if the item is unavailable.

Who Are Providers?

Therapists and tutors are providers. Schools or entities that provide summer learning experiences are also providers.

Providers must be registered with and approved by the ESA+ Program.

Registration Process to Become a Provider

The Education Student Accounts Program (ESA+) registers providers to receive direct electronic payments from families for [allowable expenses](#). This process is for **individuals or facilities** that provide tutoring or teaching services and educational therapies (service providers) and companies that sell curriculum (product providers). North Carolina law requires that providers paid with ESA+ funds be qualified.

This process is not for schools.

If you are looking for a list of registered providers, please visit our [Provider Search](#) page.

Step 1: Submit Provider Registration Request and Create Account

Visit the [Provider Portal](#) to register as a provider (for the purposes of this process, a provider may be referred to as a vendor).

Step 2: Submit Required Documents

Once you have created your provider account you will be asked to submit the required documents listed below.

- ESA+ Facility or Individual Provider Agreement (available through the Provider Portal)
- Provider Credentials

<https://www.ncseaa.edu/k12/esa/provider-registration/>

The provider must register themselves, but the parent may want to encourage them to do so, or explain the process.

Providers: *timing considerations*

If a provider has not started the registration process by March 1, 2024, parents will not be able to pay that provider for summer services.



Rollover of Funds: *timing considerations*

1. \$9,000 awardees have until approximately June 3 to spend 2023-24 ESA+ funds.
2. \$17,000 awardees can roll over up to \$4,500 of their 2023-24 funds to use in the summer or through the next year.



Considerations:

Allowable Summer Expenses



Student Accounts (ESA+) Program / 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)

Use of Funds During the Year or for the Summer

Qualified Products

- ❖ Curricula for academic subjects
- ❖ Textbooks
- ❖ Educational Technology

Qualified Services

- ❖ Tutoring/Teaching Services for academic subjects
- ❖ Educational Therapies

Summer Learning Program Providers

Summer learning experiences must be offered by a provider who has successfully registered with ESA+.



Direct Payment Schools are required to register with ESA+ in order to be paid as a provider. *This policy is new; effective for summer 2024.*

Tip: Plan ahead for 2024 summer learning experiences. Check that your providers are successfully registered with ESA+ before March, to be sure.

Summer Learning Experiences

1. Summer services must be paid for by June 3.
2. Summer services may be tutoring, therapies, academic programs, or other summer learning experiences.
3. Like all approved services, summer experiences must be:
 - Therapeutic
 - Academic

or

 - Designed specifically for students with special needs



Tip: Many traditional summer camps are not a qualified expense.

Summer Learning: EXAMPLES

Talisman Camps: Summer Camps for Kids with Autism, Aspergers, and ADHD

<https://talismancamps.com/>

These programs are examples of camps that are registered to be ESA+ providers.

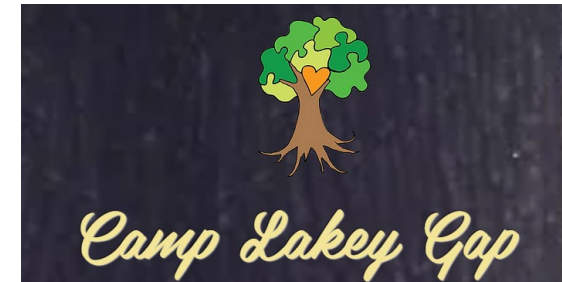
- There may be other services on the ESA+ list, and
- ESA+ will also be glad to register additional qualified programs.



Camp Royall

Welcome to Camp Royall!

<https://www.autismsociety-nc.org/camp-royall/>



<https://www.camplakeygap.org/>



Cornerstone Therapeutic Horsemanship

Marshall, NC 828-380-9554



Tutoring/ Therapies

Services that take place in June/July/August must be paid for in full by June 3.





Refunds For Any Summer Service

Refunds must be returned to ESA+ via ClassWallet. Contact ESA+ via email to ask for help regarding funds to be returned.

Note too that funds returned after the end of the fiscal year (June 30 each year) are not returned to a parent's account.





Home School Families: Will you need Curricula before September next year?

Make plans early, and plan to purchase before June 3!

IMPORTANT ESA+ REMINDERS

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 the ESA+ Reimbursement Schools)
- 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).

2023-24 ESA+ Family Trainings

<https://www.ncseaa.edu/k12/esa/esa-family-trainings/>

➤ Recordings from summer 2023:

June 21 Welcome to the 2023-2024 School Year!

June 28 Enrollment

July 5 Using Your Funds

July 12 ESA+ Reimbursement Schools

July 19 Why Was My Order Rejected? Understanding ClassWallet

July 26 Purchasing Curriculum

August 2 Award Levels & How to Update the Area of Disability

August 9 Navigating Two Programs: Students Who Receive the ESA+ & Opportunity Scholarship

August 23 The Continuing Eligibility Requirement

December 1 How to Plan for Summer Expenses

Contact Us



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