

# North Carolina ESA+ Program

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Participating Family Training Presentation



CLASSWALLET

# Agenda

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- Program Overview
- Allowable Expenses
- ClassWallet Access
  - View and Accept the Affidavit
- Using Your Funds
- Top Vendors
- Bundling your purchases Ed Tech
- Orders - Rejected - Next Steps
- Account Suspension - Next Steps
- Other Important Information



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# Program Overview

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North Carolina's Education Student Accounts (ESA+) program is available to meet the needs of students with disabilities. Funds may be used to pay tuition and fees for eligible private schools, and for expenses such as speech therapy, tutoring services, and educational technology.

- \$9,000 annual award; students with certain designated disabilities may be eligible to receive \$17,000 a year
- Families may choose from a variety of learning environments, including private schools, home schools, or co-enrollment
- Eligibility based on documentation of a disability and other program requirements

For the upcoming school year, parents of some students will spend their funds via ClassWallet.

# Allowable Expenses

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- 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.
- Standardized Tests — (typically only home school students; Direct Payment Schools are responsible for required testing at schools)

# ClassWallet Access

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# Welcome to ClassWallet!

We're pleased to announce that the NCSEAA ESA+ program is using ClassWallet, an online funds management platform, to distribute funds to you. You can use these funds to make purchases within the ClassWallet Platform by way of e-Marketplace and by submitting payments for approved service providers.

The first step to accessing your account is receipt of the Welcome email from ClassWallet. This email provides instructions and briefly explains the products and tools your organization will be utilizing.



## Welcome

The North Carolina State Education Assistance Authority is using ClassWallet to distribute the ESA funds to you. You can use these funds to shop in the marketplace. You can now access your ClassWallet account.

### Access Your Account

Returning users can log in with their existing credentials  
First time users, please do the following steps.

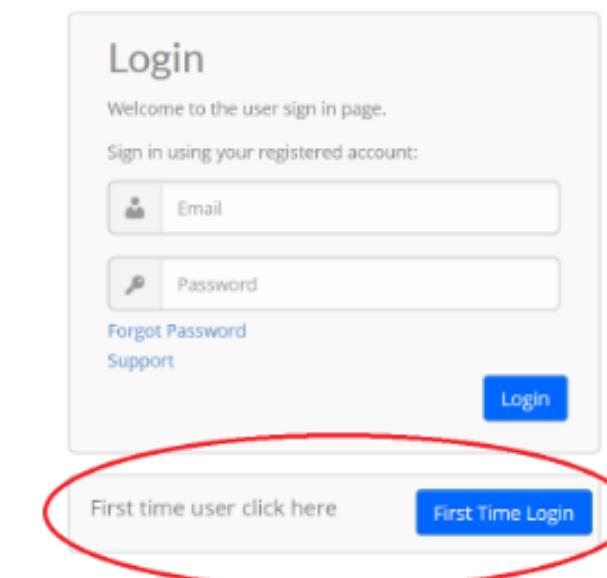
#### **Step 1 - Establish your ClassWallet account:**

Go to [app.classwallet.com](http://app.classwallet.com) and click on "First Time Login". Enter your email address and then follow the prompts.

#### **Step 2 - Verify your account:**

ClassWallet will send you an email to verify your account. Click on the link in that email to complete your ClassWallet registration process.

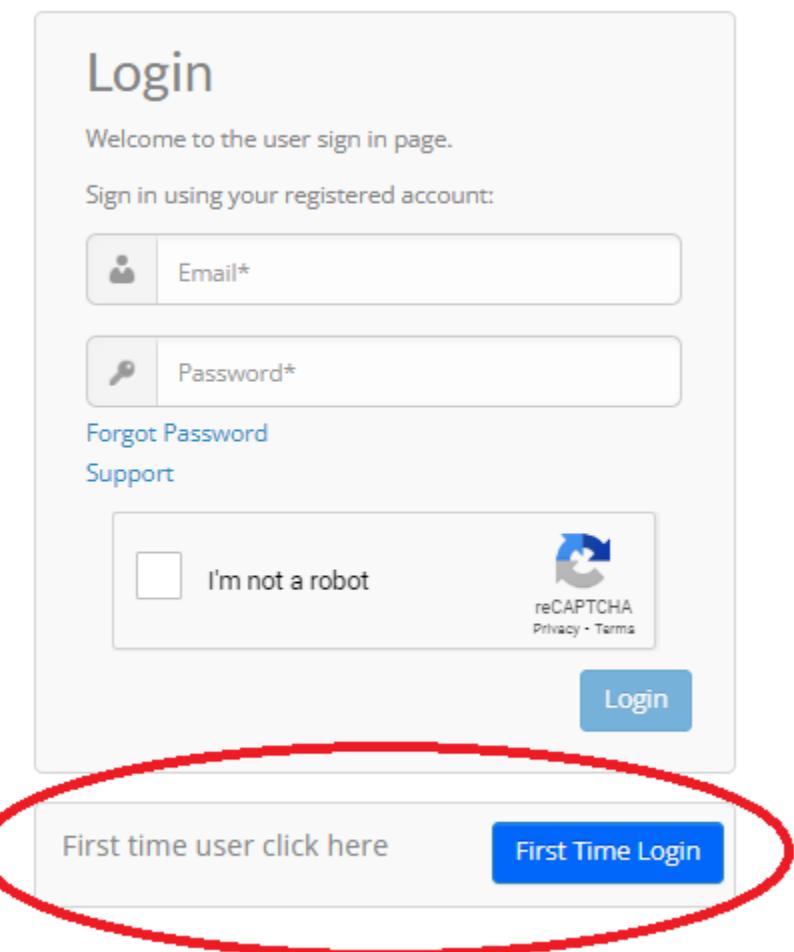
[Please click here to get started.](#)



# Access Account: First Time Login

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1. Go to [app.classwallet.com](http://app.classwallet.com) and click on the “First Time Login” button.



2. Enter your email address, check the box that says, “I’m not a robot” and then click the blue button to verify your email address.

**\*\*Email address must be entered in all lowercase letters\*\***

The image shows a form for verifying an email address. It includes a field for "Your email\*", a reCAPTCHA verification box, and a "Verify Email Address" button.

# Access Account: First Time Login

3. ClassWallet (info@classwallet.com) will send you an email to verify your account. Click "Login" in the email.



4. Create the password you will use to access your account moving forward and read and agree to the Acceptable Use Policy

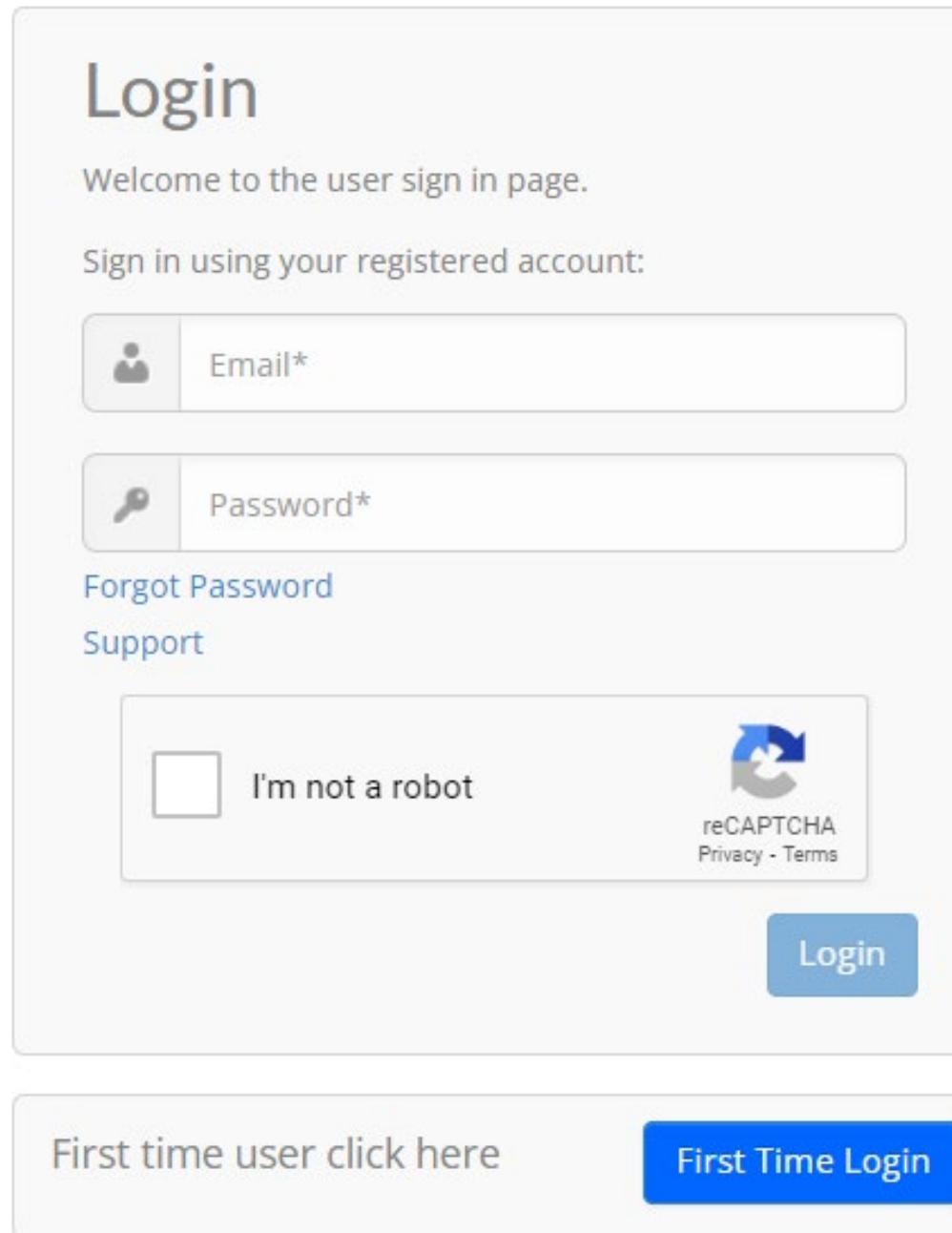
The image shows the "First Time Login" screen. At the top, it says "Please set your new password". Below that is a "Enter Password" field with a placeholder "Enter Password". Underneath is a "Re-Enter Password" field with a placeholder "Enter Password". At the bottom, there is a checkbox with the text "I have read and agree to abide by the terms of ClassWallet's Acceptable Use Policy located at: <https://classwallet.com/acceptable-use-policy>". Below the checkbox are "Logout" and "CONTINUE" buttons.



# Access Account: Login

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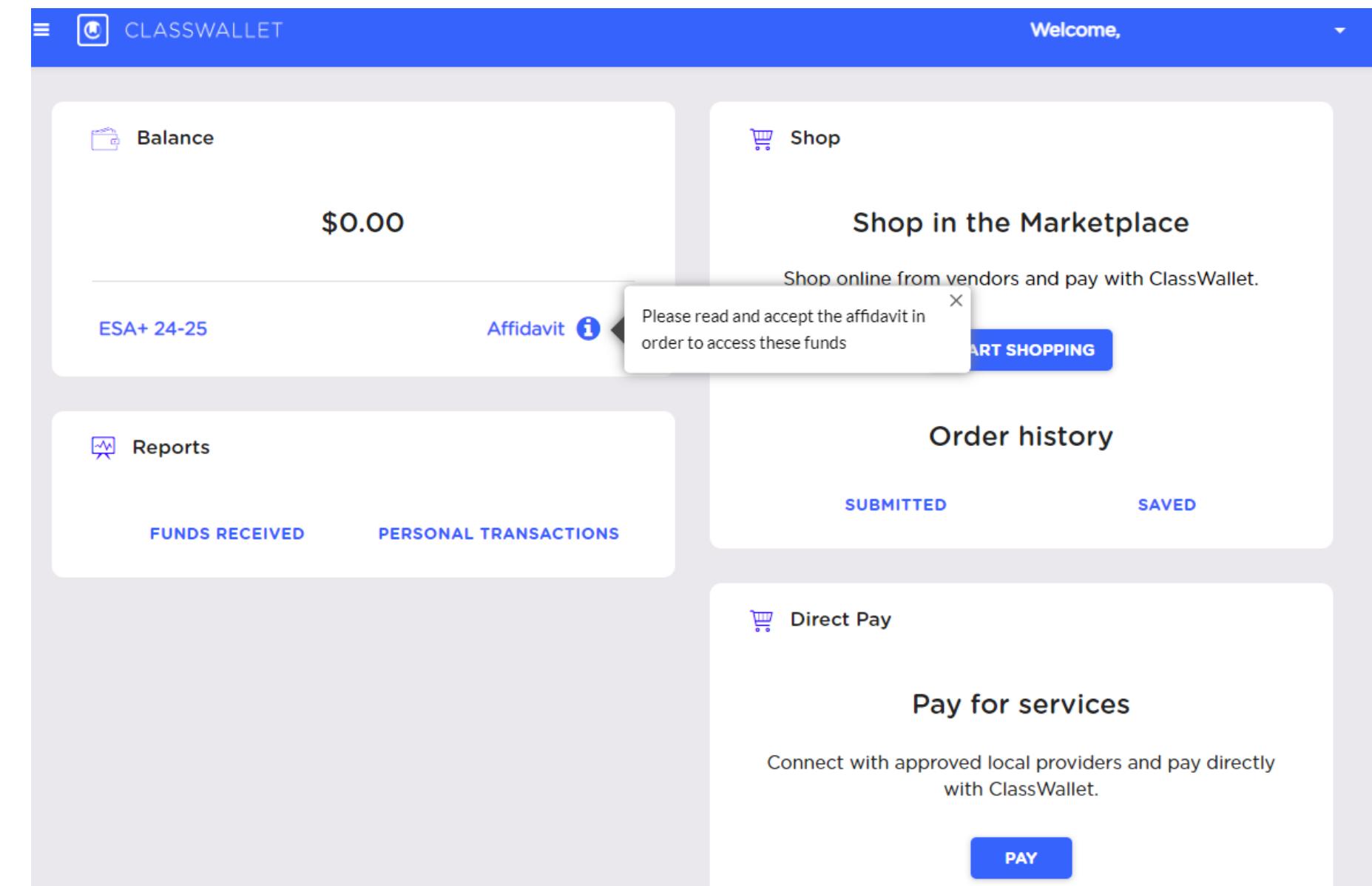
When you are ready to log-in, go to [app.classwallet.com](http://app.classwallet.com) and enter your email and the password you've created.



The image shows a screenshot of a login page. At the top, the word "Login" is displayed in a large, dark font. Below it, a sub-header reads "Welcome to the user sign in page." A instruction "Sign in using your registered account:" is followed by two input fields: one for "Email\*" with a person icon and another for "Password\*" with a key icon. Below these fields are links for "Forgot Password" and "Support". A reCAPTCHA box is present, containing a checkbox labeled "I'm not a robot" and the reCAPTCHA logo. To the right of the checkbox is the text "reCAPTCHA" and links for "Privacy" and "Terms". A blue "Login" button is located at the bottom right of the main form. At the very bottom of the page, there is a white bar with the text "First time user click here" on the left and a blue "First Time Login" button on the right.

# ClassWallet Homepage

- Balance – View your balance and any applicable deadline and / or pending affidavit
- Shop – Shop with the vendors in the Marketplace
- Pay Vendor – Pay a DirectPay Vendor
- Reports – View funds received and all order details
- Support – Find training videos, FAQs or contact Support
- Account Settings – Edit basic info, update your password or your security question and answer



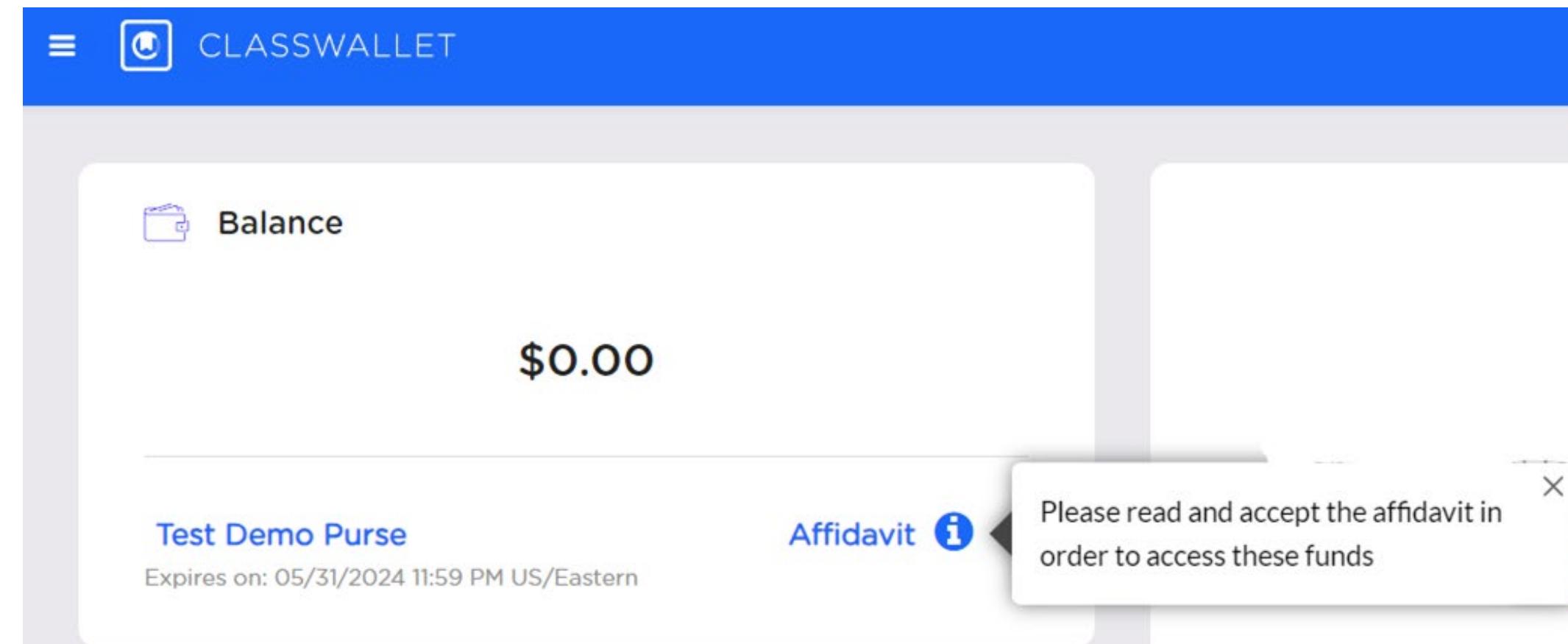
# View the Affidavit

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The program requires the affidavit to be accepted in order to access the funds.

Before you can spend your funds, you must read through and accept the affidavit as outlined by ESA+.

Upon logging in for the first time, you will see the link to the affidavit related to funds made available to you.



# Accept the Affidavit

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## Affidavit Options:

- **Accept** – You will see your account balance displayed and can begin to place orders.
- **Skip for Now** – You will be taken to your ClassWallet account, but your balance related to these funds will display \$0. You must click on the blue “Affidavit” link in order to display the affidavit and “Accept” it in order to use these funds. You can view instructions [here](#).
- **Reject** – On the confirmation message, you can confirm your rejection to use the funds or click “Go Back” to change your selection. If you accidentally rejected the affidavit, you will need to contact ClassWallet support to reset your selection.



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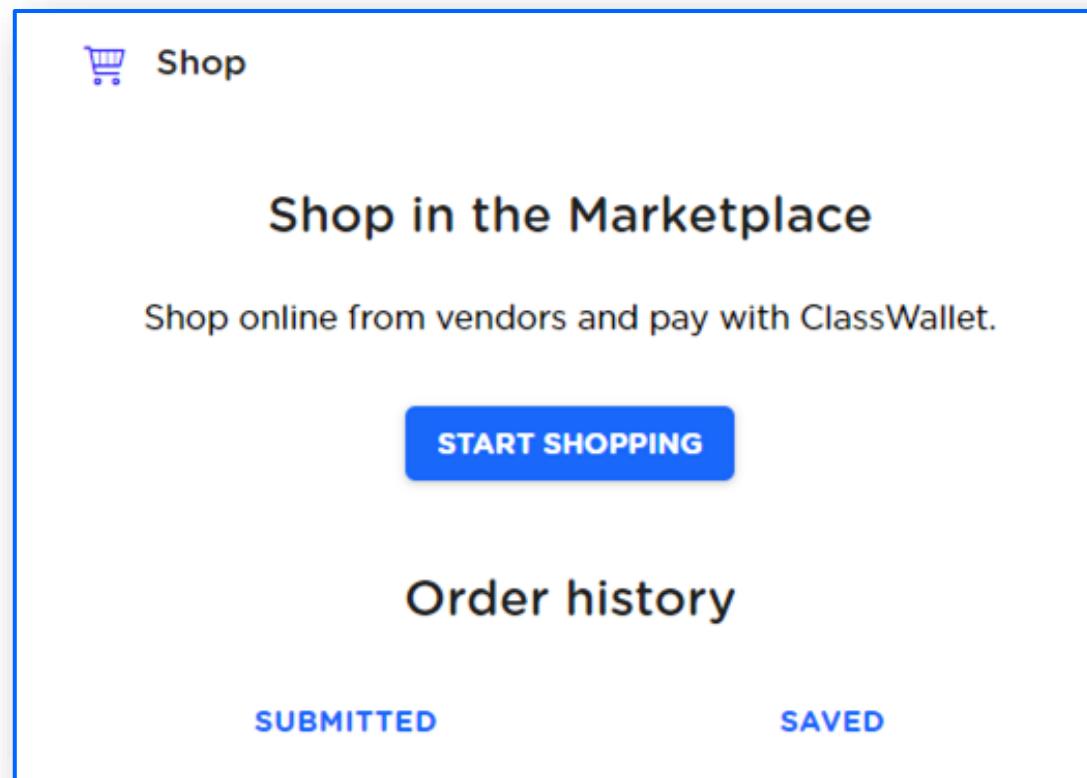
# Ways to Use Your Funds

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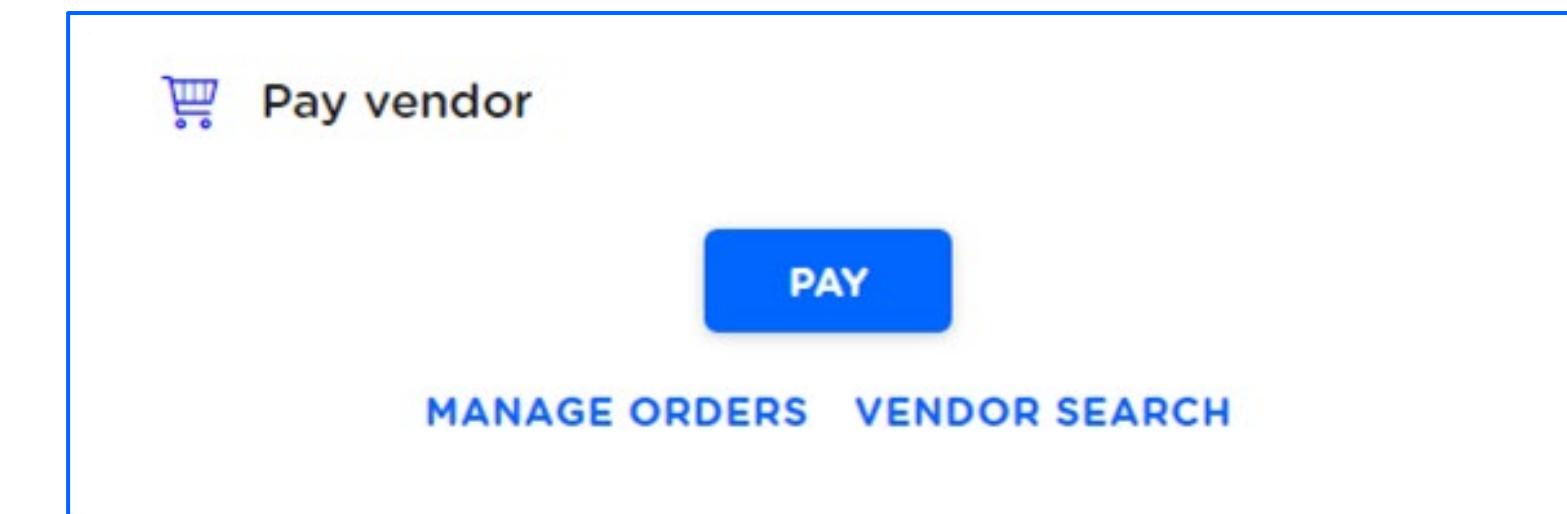
# Ways to Use Your Funds

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You can easily use the funds in your ClassWallet account to make purchases through the below methods



*Shop online with vendors that offer a fully integrated e-commerce shopping experience.*



*Pay enrolled service providers for approved services.*

# Shop Through the Marketplace

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To begin shopping, select "Shop" from the hamburger menu or click on "Start Shopping" from the Shop tile on the home page.

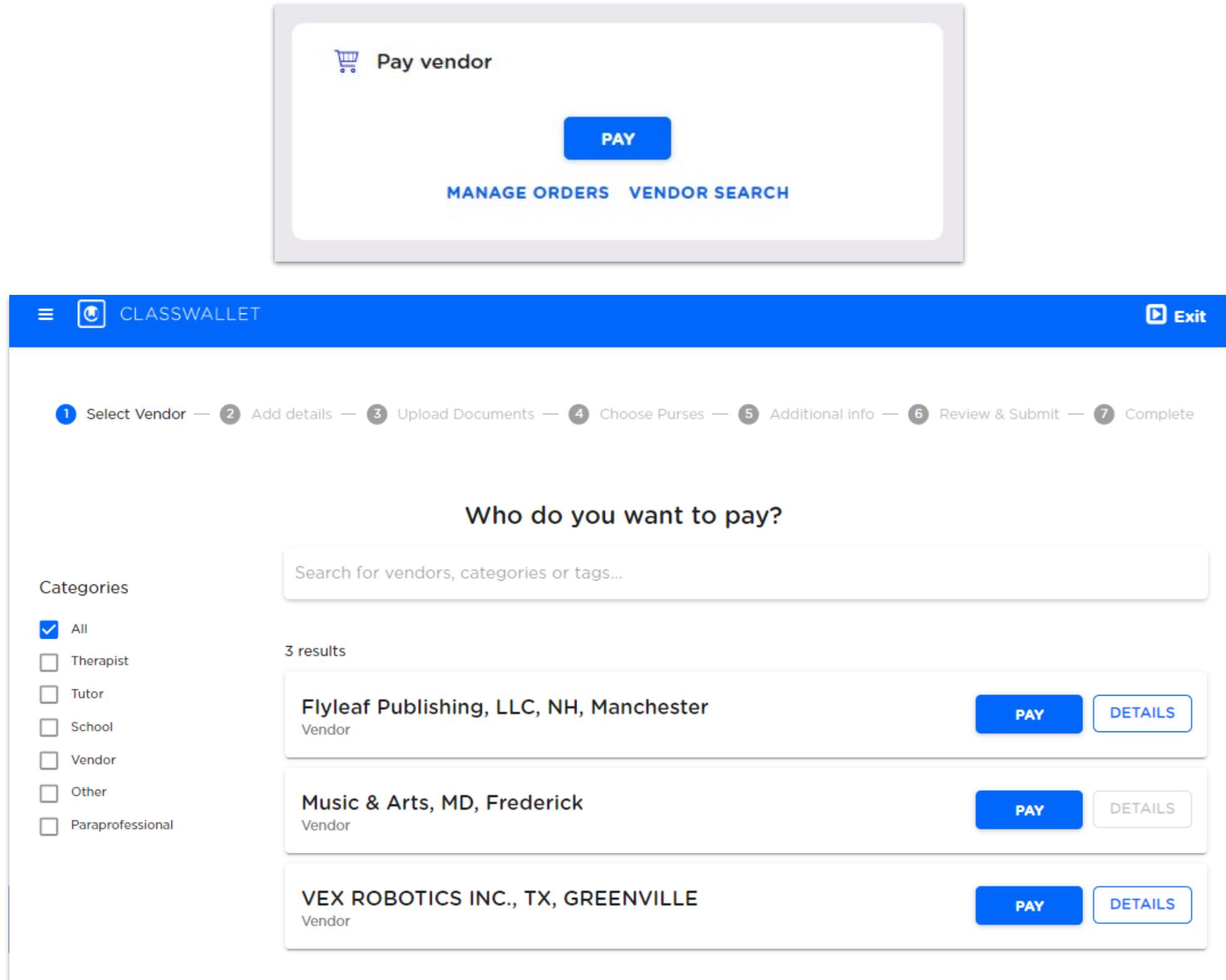
You can view step-by-step instructions here:  
<https://classwallet.my.site.com/classwallet/article/How-to-shop>

Or watch a short 2-minute video here:

- <https://www.youtube.com/watch?v=onmL-KLS1Y>

All orders will be reviewed by ESA+ prior to the completion of the transaction.

# Pay a Service Provider



You can find enrolled service providers in the "Pay Vendor" module and issue payment. You will need to upload an invoice containing the required information.

You can view step-by-step instructions here:  
<https://classwallet.my.site.com/classwallet/s/article/How-to-pay-a-vendor>

You can also watch a short 2-minute video here:  
<https://youtu.be/vt0oLysesB4>

All payments will be reviewed by ESA+.

*\*\*Please keep in mind these videos and articles may not accurately represent the settings of your specific organization.*

# Frequently Used Vendors

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## Marketplace

Amazon  
Best Buy - NC ESA  
Apple for Families  
Lakeshore  
Leaf Box  
Scholastic  
Emerge a Child's Place  
Carolina Biological  
Knowledge Crates

## Direct Pay

Books for School  
Buddy Books  
Carson Dellosa Education By Staples  
CrunchLabs LLC  
Demme Learning  
Dynamic Opportunities  
iBrick  
Hands 4 Building  
Ivy Kids  
and more...



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# Category Selection Requirement

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Upon submitting a transaction through the Marketplace or Pay Vendor module, you will be required to select the appropriate category related to your transaction. Please select the category for each transaction.

Category
Tuition And Fees
Textbooks
Tutoring
Curricula
Testing Fees
Public School Fees
Educational Therapies
Educational Technology
Student Transportation

# Transaction Confirmation Emails

After you submit a Marketplace order or a payment to a Service Provider, you will receive the following emails:

1. Confirmation of submission for ESA+ to review
2. Confirmation of the reviewer's approval or rejection, along with any applicable comments

The image displays three side-by-side screenshots of ClassWallet transaction confirmation emails. All three emails share a similar header with the ClassWallet logo and the text "ClassWallet...brought to you by Kleo, Inc." and a "View this email in your browser" link.

- Left Email (Order Receipt):** The subject is "ClassWallet Order Receipt". It contains the message "Your order has been sent for approval." and a "Order Details" section.
- Middle Email (Order Approved):** The subject is "ClassWallet Order Receipt". It contains the message "Your order has been approved" and "Title: ESA 19/20 Q3" and "Paid amount: \$240.00". It also includes the message "The following comments were left: Approved (MF): Tutoring Services (2/24)" and a "Order Details" section.
- Right Email (Order Rejected):** The subject is "Order Rejected". It contains the message "Administrator has rejected your order for the reason explained below:" and "The following comments were left: Please categorize as reading books." It also includes the message "Please respond by sending an email to your admin [REDACTED]" and "Funds have been moved back into your account and are available for future purposes." and a "Order Details" section.

# Helpful Reports to View

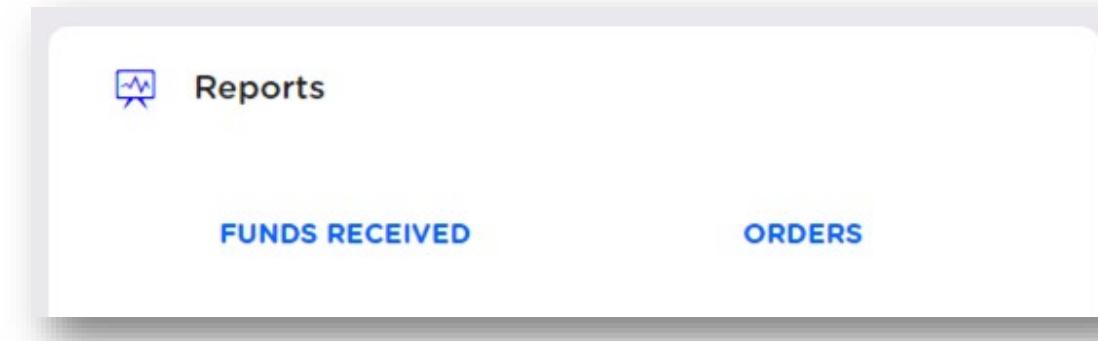
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# Access & View Reports

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**You can view reports and all account activity in your ClassWallet account.** You can find these real-time reports through the Report tile found on the homepage or the sidebar menu.

**Access reports from the homepage tile**



**OR**

**Access reports from the menu**

Reports



Funds Received

Personal Transaction Report

# Approvals and Rejections

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# Approvals and Rejections

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If ESA+ approves your order, you will receive notice of the submission and the vendor will then be sent your order details for fulfillment. Shipping times vary per vendor, but orders typically are to be shipped within 24-48 business hours after receipt.

If ESA+ rejects your order, all funds will be credited back to your ClassWallet account balance.

Inquiries related to the approval / rejection decision should be directed to the designated administrator listed in the **confirmation emails**.

# My order was rejected. What now?

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- Check email regularly to ensure an order has not been rejected.
- You will get a confirmation email about approvals. If you are not seeing the emails, please check your spam/junk folder.
- If an order is rejected, an email will come from [help@classwallet.com](mailto:help@classwallet.com).
- Highly recommend to mark this email as “safe sender” to ensure you always receive these emails.
  - [General Best Practices for Email](#)
- Inquiries related to the approval / rejection decision should be directed to the designated administrator listed in the **confirmation emails**.

# Account Suspended

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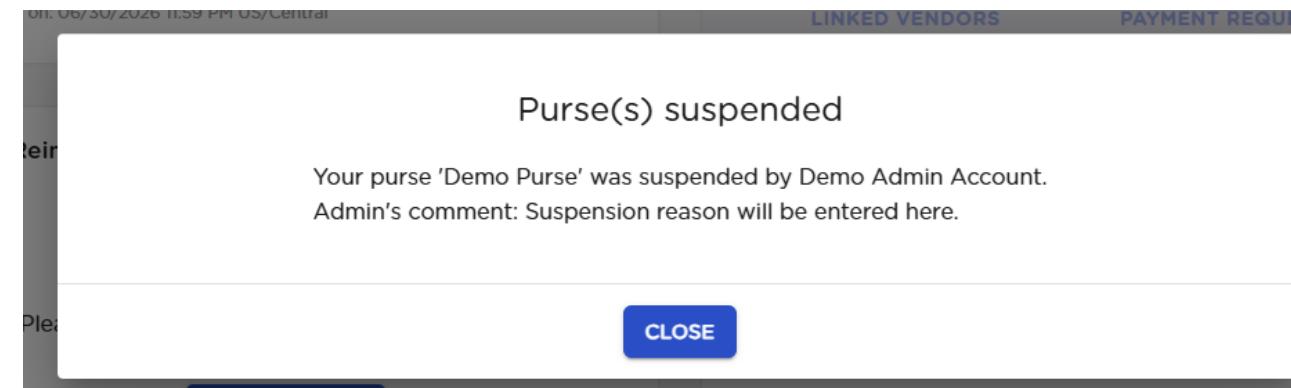


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# My purse is showing suspended. What now?

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- You may not use the funds in your ClassWallet account if your purse is suspended.
- Reason for account suspension listed on the home page.



- Follow the instructions within the suspension message to unsuspend your purse.

# Other Important Information

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## Deadline and Other Important Notes

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Please check your account and emails from ESA+ and ClassWallet related to any upcoming deadlines. If there is an expiration date for your funds, you will have until that day and time to submit any orders.

After your program's deadline, you will not be able to submit a new order if a refund is issued to your account. Because of this, it's recommended that you place Marketplace orders early to account for any delivery delays, returns or refunds.

# General Questions About Security

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## **ClassWallet takes customer security seriously.**

For most users, we only need to capture a valid email address to open the account and a valid address to ship purchases to. For some optional services, we need to capture more personal information.

**Whenever possible, we rely upon our partner banks to capture the data securely and we never store personal data in the ClassWallet system. We employ the same level of security for the bank accounts that we establish for our users.**

Securing customer funds is a top priority at ClassWallet. When deploying funds onto the ClassWallet platform, customer deposits are secured through the use of separate and discrete customer accounts with their own ABA, routing numbers and FDIC insurance. Customer funds are held at BankUnited, a Qualified Public Depository (QPD) in the state of Florida. A QPD is qualified to hold public funds and has stringent collateralization, monthly and annual reporting requirements to the Florida State Treasury.

**View more information here: [General questions about security](#)**

# ClassWallet User Support

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We're here to help! **You can find the SUPPORT tile on your ClassWallet home page for easy access to FAQs, videos and contact information.** ClassWallet Support can be reached by emailing [help@classwallet.com](mailto:help@classwallet.com) or by calling 877-969-5536.

Our support team can assist you with the following:

- First-time login
- Updates to your account
- Affidavit selection or reset
- Vendor inquiries
- Order submissions
- Order updates & delivery
- Returns and exchanges
- Document/invoice upload

## **Customer Support Hours:**

Monday – Friday: 8 AM to 8 PM EST  
Saturday: 10 AM to 4 PM EST

For programmatic inquiries, please contact [esa@ncseaa.edu](mailto:esa@ncseaa.edu).

# Thank You