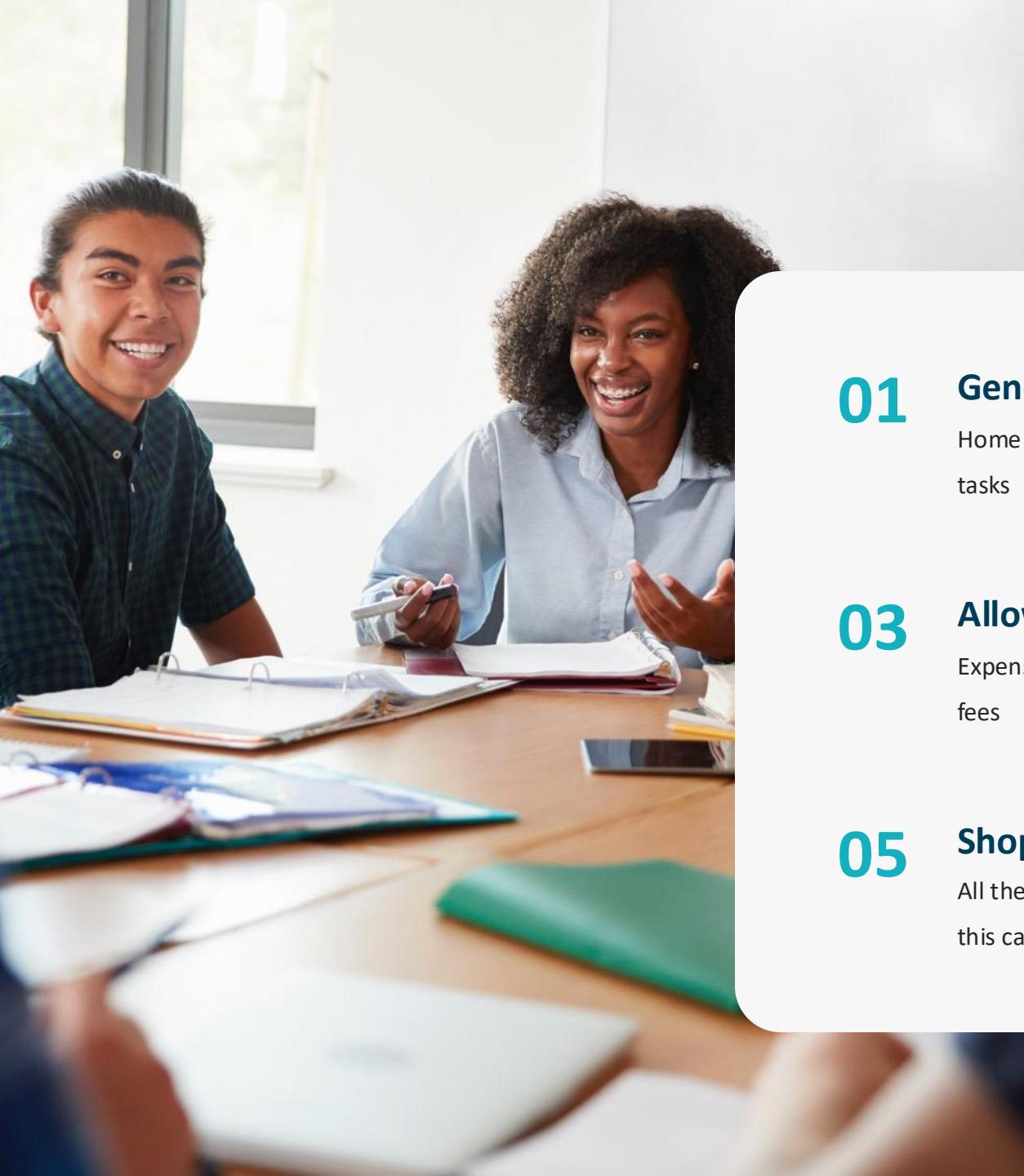




# Welcome! ESA+ for Home Schools

*Expenses other than tuition:  
What is allowable and How to  
purchase or pay*



**01**

## General Info

Home School unique details & tasks

**03**

## Allowable Expenses

Expenses other than tuition and fees

**05**

## Shopping for Curricula

All the scoop for purchasing in this category

**02**

## ClassWallet

Accessing funds via CW

**04**

## Products & Services

Making purchases and paying providers in ClassWallet

**06**

## Tips for ClassWallet

Best practices for an easy experience

# 01

## Home Schools Generally



# Home Schools

- ❑ Parents register their home school with DNPE.
- ❑ ESA+ cannot pay for tuition on behalf of students in a home school.
- ❑ ESA+ is not a program for students in public school full-time.
- ❑ There is no reimbursement for purchases. Parents pay directly for products and services through ClassWallet.
- ❑ Parents who home school use ESA+ funds for educational therapies, tutoring, curriculum, and technology.



## Tasks & Timing

- Everyone signs a Parent Agreement and completes a W9. (*ESA+ staff review and check these in.*)
- Some parents have other tasks such as the LEA Release, Home School Registration, or Enrollment Verification.

### When will funds be in ClassWallet for my student?

- By the end of January, we expect most Home School families to access ESA+ funds.

*Is your student in a Direct Payment School (and not Home School)? The school will receive funds for tuition first, and then, remaining funds move to ClassWallet.*

# Another Form to Sign ...



- ESA+ parents will need to electronically sign a **Release of Public School Services**.
- Only parents of ESA+ students attending a nonpublic (private or home) school full-time will sign the LEA Release.
- \*reference copy-go to <https://www.ncseaa.edu/wp-content/uploads/sites/1171/2023/08/LEA-Release-Reference-Copy-2023-2024.pdf>

**RELEASE OF LOCAL EDUCATION AGENCY FOR THE PERIOD OF TIME THE ESA+  
RECIPIENT RECEIVES ESA+ SCHOLARSHIP FUNDS**

1. I am a Parent or guardian of a student who has been awarded a scholarship ("Scholarship"), consisting of State funds, from the Education Student Accounts for

*Did you know?*

## 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.



Each 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*)

# 02

## ClassWallet



*First things first ...*

# 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
  - submit receipts from an ESA+ Reimbursement School



CLASSWALLET

# ESA+ funds → ClassWallet

- Funds deposited to ClassWallet account at the beginning of each semester after all outstanding tasks have been completed.
- Make purchases and pay providers throughout the school year.



# How will I know when the funds are in ClassWallet?



CLASSWALLET

- Notification will come from [info@classwallet.com](mailto:info@classwallet.com)
- Subject Line: “Welcome to ClassWallet | Access Your ESA+ Funds”
- Sent to your email address as listed in MyPortal

***Hint:** It may end up in your spam or quarantine folders so please check those before contacting ESA+ staff*

# Welcome Email from ClassWallet

EXTERNAL | Welcome to ClassWallet | Access Your ESA+ Funds



ClassWallet <info@classwallet.com>  
To

[View this email in your browser](#)

[Reply](#) [Reply All](#) [Forward](#) [...](#)

Thu 10/20/2022 1:47 PM



## Welcome!

Congratulations on receiving your **ESA+** funds from the North Carolina State Education Assistance Authority (NCSEAA). Your funds have been deposited into an account established for you on ClassWallet. You will be able to view your award balance and make purchases or payments through your ClassWallet account.

- [Step 1 - Access your ClassWallet account](#)
- [Step 2 - Accept the Affidavit](#)
- [Step 3 - Review Ways You Can Use Your Grant Funds](#)
- [Get support if needed](#)

All purchases must be made online at [www.classwallet.com](https://www.classwallet.com). You will not receive a debit card, nor can you use these funds to reimburse purchases made outside the ClassWallet Marketplace.

You can access ClassWallet's Knowledge Base in your account for helpful articles and videos

<https://classwallet.my.site.com/classwallet/s/>

**How to Log In**

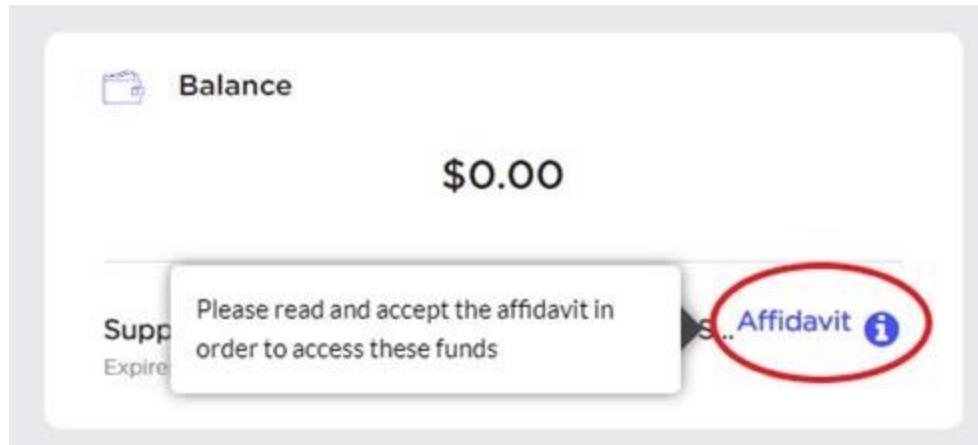
**Accessing the Affidavit**

**Using Funds**

**Links to tutorials and more!**

# What is the Affidavit?

Once you sign into your account after funds have been sent, you will be prompted to **accept the affidavit to access the funds.**



I certify that my student is receiving an education in the subjects of English language arts, mathematics, social studies, and science for at least 75 days of the current semester.

I further acknowledge my understanding that I am required to spend at least \$1,000 of the ESA+ Program scholarship funds by the end of the current school year to pay for an education for my child; an education that consists of education in the subjects of English language arts, mathematics, social studies, and science.

# 03

## Allowable Expenses



# Allowable Expenses



01

**Tuition and Fees**



02

**Services: Educational Therapies, Tutoring, & Transportation**



03

**Products: Curricula & Technology**

# More Detail about Services & Products

- ✓ 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 — Fees for nationally standardized tests

**See the ESA+ website for links to explanations about WHICH expenses are allowable, and HOW parents pay for them.**

# What is Included in the Category “Curricula”?

## Resources that clearly support an academic program

- Lesson plans
- Learning kits
- Workbooks
- Books for reading

## Examples of Excluded Items

- Consumable educational supplies (printer ink, paper, pens, etc.)
- Household items
- Field trips
- Memberships
- Sports equipment
- Musical instruments
- Art supplies

**academic = *math, science, English/language arts, social studies, foreign language***

# Examples of Curricula Purchases

## Allowed



- *A learning kit that contains seeds or plants, a kitchen scale, and rubber gloves. The learning resources in the kit would clearly support a lesson about science.*
- A LEGO®Education building set that includes LEGO® bricks, building inspiration cards, teacher guide with 8 STEAM lessons, and a selection of online learn-to-build animations.

## Not Allowed



- *Separate purchases of seeds or plants, a kitchen scale, and rubber gloves. These would be rejected because they are considered “household items”.*
- A LEGO®Fire Station building set

# 04

## Products & Services

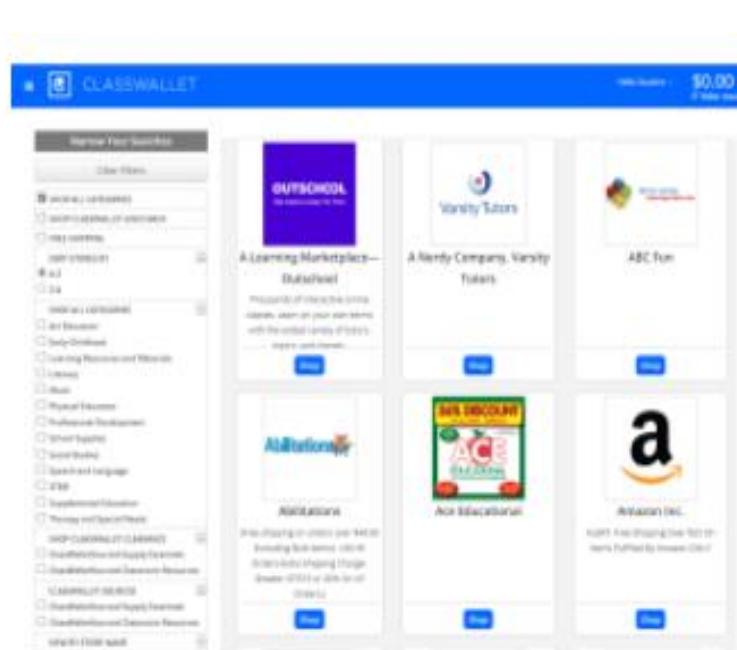


# 2 Paths In ClassWallet

## 1. Direct Pay Vendors (mainly tutors and therapists)

## 2. Marketplace

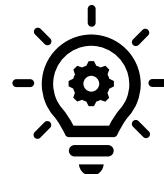
- Stores where you buy curriculum and technology
- A couple national tutoring companies



# Using ClassWallet

Need more help with the ClassWallet payment process?

<https://www.ncseaa.edu/k12/esa/payment-process/>



See the “How to” articles:

<https://classwallet.my.site.com/classwallet/article/How-to-pay-a-vendor>

<https://classwallet.my.site.com/classwallet/article/How-to-shop>

How to Purchase Products on ClassWallet

How to Pay a Service Provider in ClassWallet

How to pay for curricula purchased through providers listed on the NCSEAA Product Provider List on the Curriculum webpage.



CLASSWALLET

# What is a Provider?



*And one final word regarding ...*

# Service Providers

## **What does a therapist or tutor need to do for me to pay for their services?**

The law that governs the ESA+ Program requires that service providers have appropriate credentials. SEAA asks providers to submit a credential and sign a Provider Agreement.

## **How can I find a therapist or tutor that is already enrolled with ESA+?**

SEAA maintains a list of providers who have already documented their credentials. Use the “Search for a Provider” tool on the ESA+ website.

[How to Apply for the ESA+ Scholarship](#)

[ESA+ Awarding Process](#)

[ESA+ Scholarship Families](#)

[ESA+ Family Trainings](#)

[Allowable Expenses](#)

[Curriculum](#)

[Educational Technology](#)

[Educational Therapy](#)

[Tutoring](#)

[Payment Process](#)

[Documentation of a Disability](#)

[Enroll a Provider](#)

[Search for a Provider](#)

[ESA+: Statutes, Rules, & Data](#)

# Service Providers Enroll

## Acceptable credentials

**Tutors** have a teaching certificate from North Carolina or another state, or a bachelor's degree.

**Therapists** must individually hold a license or accreditation that is recognized by a State, regional, or national organization that governs the field of therapy for which they are providing services.

Providers must complete enrollment with the ESA+ staff at SEAA but **you** can show them where to go and / or encourage them to complete.

### 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



### Timeline

The enrollment review process may take several weeks once all documents are received.

# Finding Service Providers Already Enrolled

<https://www2.ncseaa.edu/approvedprovidersk12/default.aspx>

or click “Provider Search” from the left side navigation



## Welcome to the NCSEAA Provider Search Site

Q Type the name of the provider or desired city in the box below.

Please note: If your desired provider is not on the list, please direct them to [NCSEAA Provider Portal](#) to register.

# 05

## Shopping for Curricula

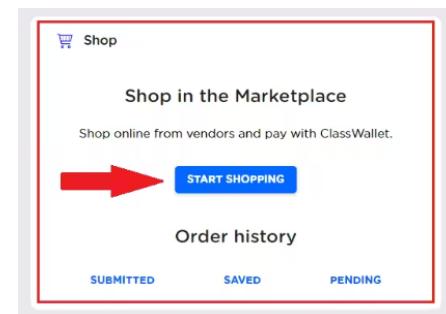


# Curricula: 2 Ways to Purchase

(Parents whose students attend a home school do not pay for tuition.)

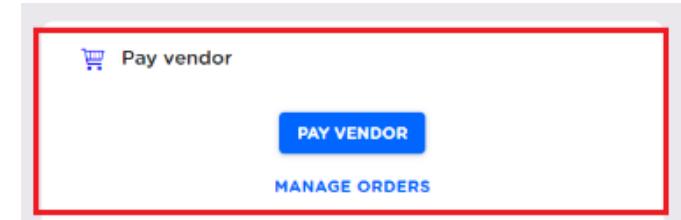
## ClassWallet Marketplace

- Access the Marketplace via your ESA+ ClassWallet account
- Shop at the online stores that appear on the ClassWallet Marketplace

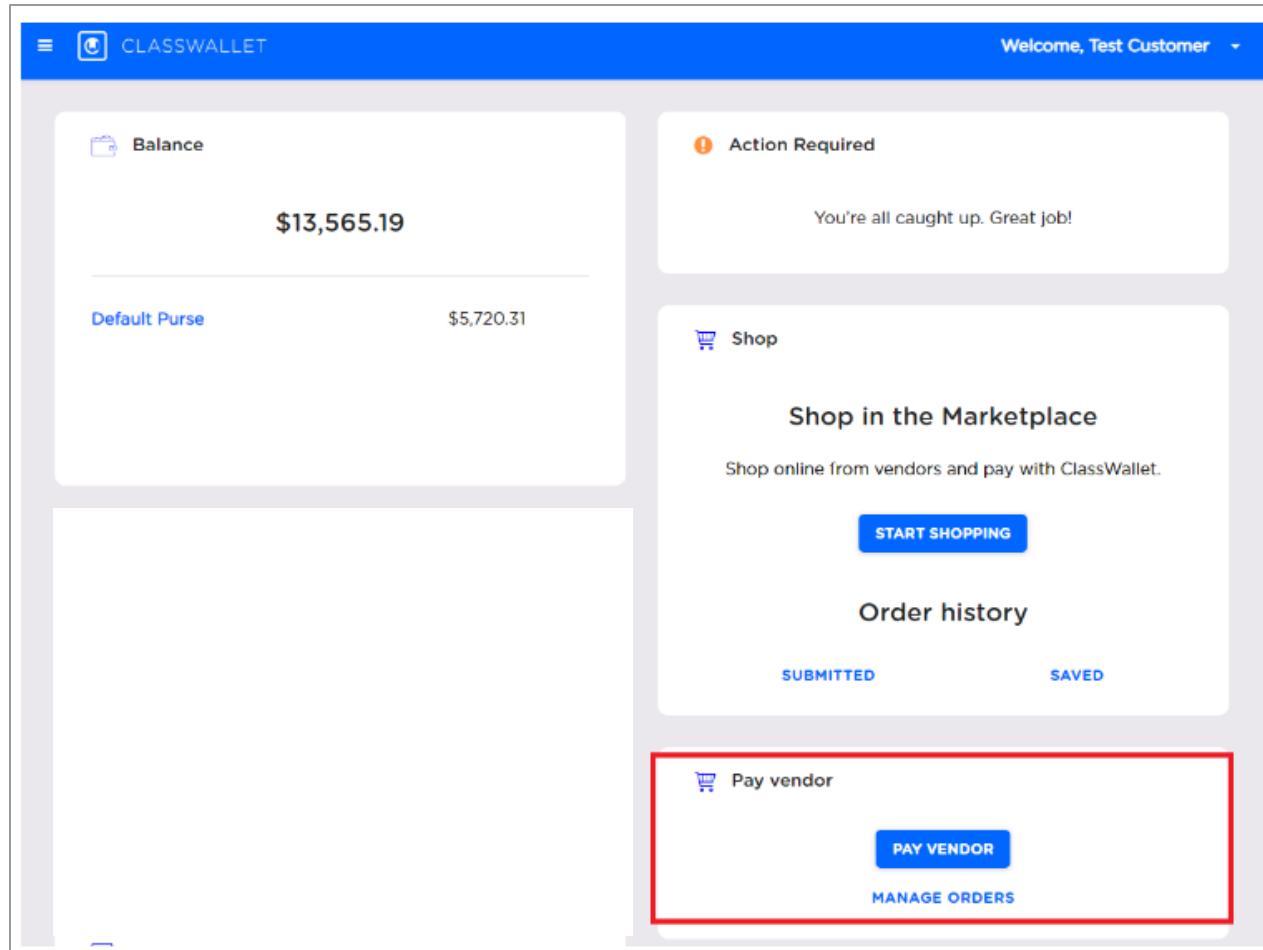


## Companies Listed as “Providers” on ESA+ Website

- Visit provider’s website to view their products
- Pay for products via ClassWallet (Pay Vendor)



# How to Pay for Curricula: ESA+ Providers



**Step-by-step tutorial for “Pay Vendor”:**  
<https://classwallet.my.site.com/classwallet/s/article/How-to-pay-a-vendor>

# ESA+ Curricula Providers: Step by Step

1. Search company's website to find curricula products to purchase.
2. **Obtain a screenshot of the shopping cart on the provider's website, or an invoice/quote/purchase order from the vendor with the exact items and final price.**
3. In ClassWallet, select the provider under the "Pay Vendor" section.
4. Upload screenshot of shopping cart or copy of invoice/quote/purchase order.
5. Enter amount, purse funds, and one expense category.
6. SEAA staff will review the proposed purchase. If approved, the funds will transfer directly to the Product Provider, who will then complete the sale with the parent.

# 06

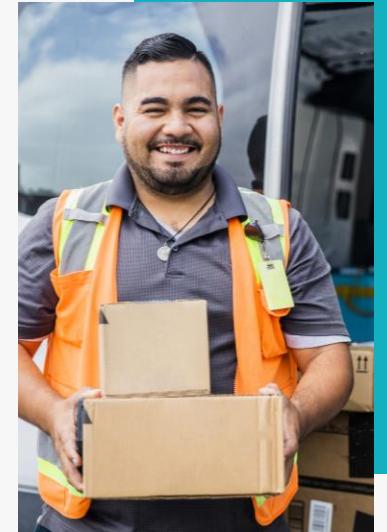
## Tips for ClassWallet



# Products Generally

*Remember that you'll categorize the items you buy when you pay for products (or services) via ClassWallet.*

- Make sure the product is allowable.
- All items in an order must be for the same category. Don't purchase technology AND curriculum in the same order.
- One unallowable item will cause the whole order to be rejected.



*Are you purchasing an item that you are not sure will be allowable?*

Put it in an order by itself so if it must be rejected, the whole order will not be rejected.



# Technology

- **Technology Accessories** (e.g., printer, computer/tablet case) must be purchased within 30 days of buying the device
- **3-year limit** on purchase of computer/tablet/interactive whiteboard (can purchase one of each, every 3 years)
  - Any item over \$600 can only be purchased every 3 years
  - Headphones – only allowed for specialized devices

# Services (tutoring or therapy)

- Check that provider is [approved](#) and service is [allowable](#)
- Payment amount requested must be equal to or less than amount due on invoice



- Student & parent names must match record; no nicknames
- Can pay ahead for services that will occur in **current semester** (cannot prepay for entire year)

**Don't add the 2.5% transaction fee to the payment amount unless the provider has included it as a line item on the invoice.**

# More ClassWallet Troubleshooting

## If your order is rejected ...

- Read the reviewer comment in the automatic email reply from ClassWallet.
- If you still have a question, email program staff. Include the order number and a description of the item.

## Apart from a problem with the item or service, there are OTHER reasons ESA+ staff have to reject orders.

- Student is not in an eligible school *make sure MyPortal shows an accurate school choice*
- Documentation of a disability out of date *update your documentation before January 1*
- Outstanding task *check MyPortal regularly*



# Need to Reorder? Change Your Address?

## What if I need to reorder an item?

- Email program staff before reordering the same item so we can make sure that the funds from your first purchase are returned to your account.
- If you don't notify ESA+ staff before you reorder, and you try to reorder immediately, the reorder will appear to ESA+ staff as a 2<sup>nd</sup> purchase of the same item, and they will reject it.

## Or update my shipping address?

- First, in MyPortal, update your mailing address in **two places**: *Mailing address* and *Permanent Mailing Address*
- Then, let ESA+ know via email that you've updated MyPortal, and we'll contact ClassWallet to change your shipping address.

# Getting Assistance

## *If I have a question about...*

- logging in to ClassWallet
- uploading an invoice
- returning an item
- a shipment (ex. missing item)
- any technical issues related to ClassWallet's website

## *If I have a question about...*

- ESA+ allowable expenses
- a rejected order or invoice
- my providers or the Direct Pay list
- my ESA+ funds and disbursement
- signing the affidavit in ClassWallet

## *Then I should contact...*

[help@classwallet.com](mailto:help@classwallet.com)

1-877-969-5536

## *Then I should contact...*

[ESA@ncseaa.edu](mailto:ESA@ncseaa.edu)

1-855-330-3955

New website: [www.k12.ncseaa.edu](http://www.k12.ncseaa.edu)

*Will launch by the end of January 2025 ...*



Home   Opportunity Scholarship   ESA+   About Us     [Access MyPortal](#)

School Administrators

[Awarded Families](#)

# Explore K12 Scholarships

Welcome to the official home of the Opportunity Scholarship and the Education Student Accounts (ESA+) program, which North Carolina families can use to help pay for their children's education. Questions? We can help.



# Contact Us



[www.k12.ncseaa.edu](http://www.k12.ncseaa.edu)



[ESA@ncseaa.edu](mailto:ESA@ncseaa.edu)



855-330-3955

