

North Carolina ESA+ Program

Participating Family Training Presentation



Agenda

- Program Overview
- Approved Expenses
- ClassWallet Access
- View and Accept the Affidavit
- Service Providers
- Using Your Funds
- Other Important Information

Program Overview

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

- 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

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.



[Info about your ClassWallet account](#)

[View this email in your browser](#)



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.

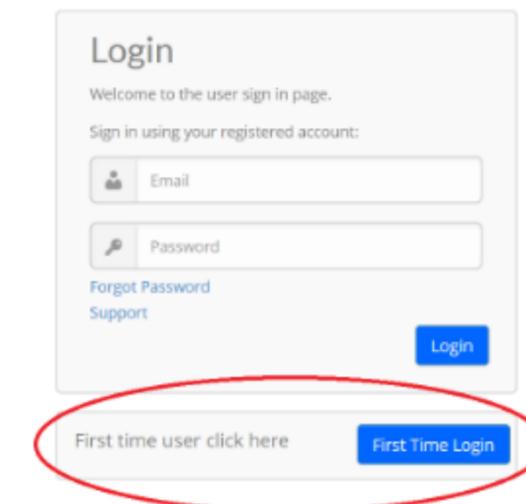
Step 1 - Establish your ClassWallet account:

Go to app.classwallet.com and click on "First Time Login". Enter your email address and then follow the prompts.

Step 2 - Verify your account:

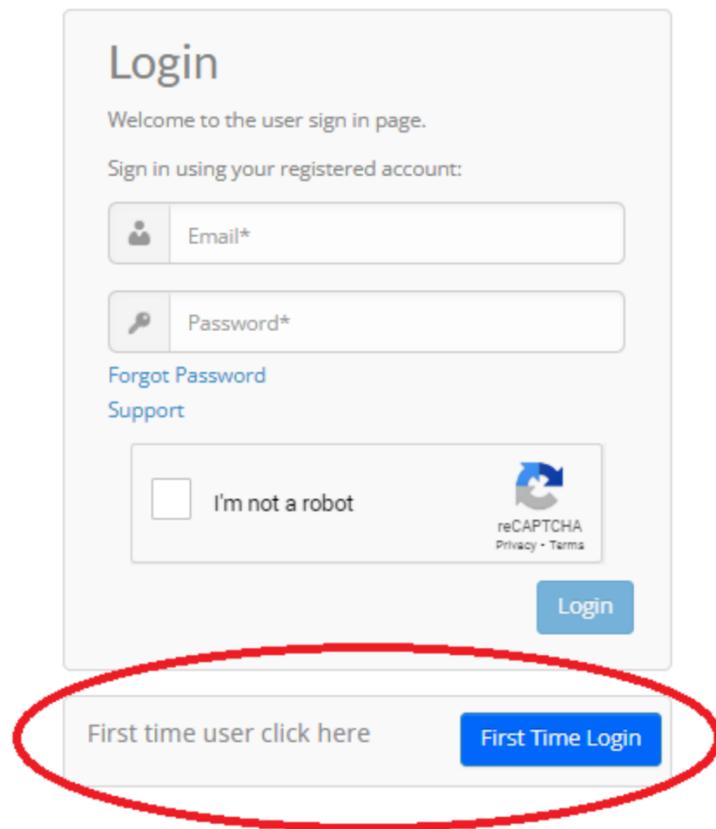
ClassWallet will send you an email to verify your account. Click on the link in that email to complete your ClassWallet registration process.

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



Access Account: First Time Login

1. Go to app.classwallet.com and click on the “First Time Login” button.

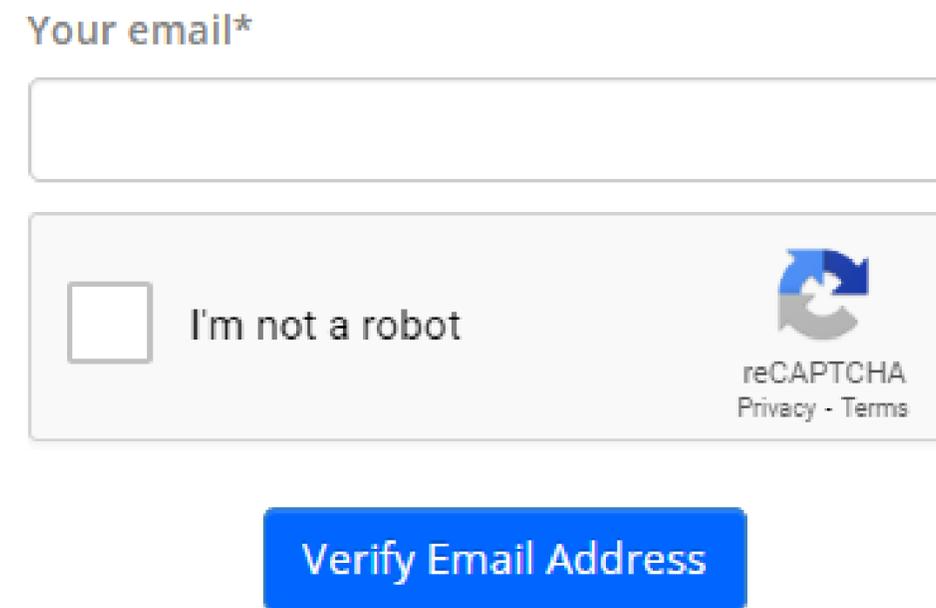


The screenshot shows a login form with the following elements:

- Login** header
- Welcome to the user sign in page.
- Sign in using your registered account:
- Email* input field
- Password* input field
- Forgot Password link
- Support link
- I'm not a robot checkbox
- reCAPTCHA logo and text (Privacy - Terms)
- Login button
- First time user click here text
- First Time Login** button (circled in red)

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 screenshot shows a form for email verification with the following elements:

- Your email* label
- Empty email input field
- I'm not a robot checkbox
- reCAPTCHA logo and text (Privacy - Terms)
- 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.

ClassWallet...brought to you by Kleo, Inc.

[View this email in your browser](#)



Your account has been verified! You're almost done.
Click on the link below to get started.

[Click to Login](#)

For security reasons, you have 24 hours to click on the button above. After 24 hours, click [here](#) and choose the First Time Login button again.



Please note: If your browser is set to block pop-ups, you will need to enable them to complete the verification.

You can see how to do this for any browser by [clicking here](#).

If you wish to contact support, we can help you.



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



Please set your new password

Enter Password

Enter Password

Re-Enter Password

Enter Password

I have read and agree to abide by the terms of ClassWallet's Acceptable Use Policy located at: <https://classwallet.com/acceptable-use-policy>

[Logout](#)

CONTINUE

Access Account: Login

When you are ready to log-in, go to app.classwallet.com and enter your email and the password you've created.

Login

Welcome to the user sign in page.

Sign in using your registered account:

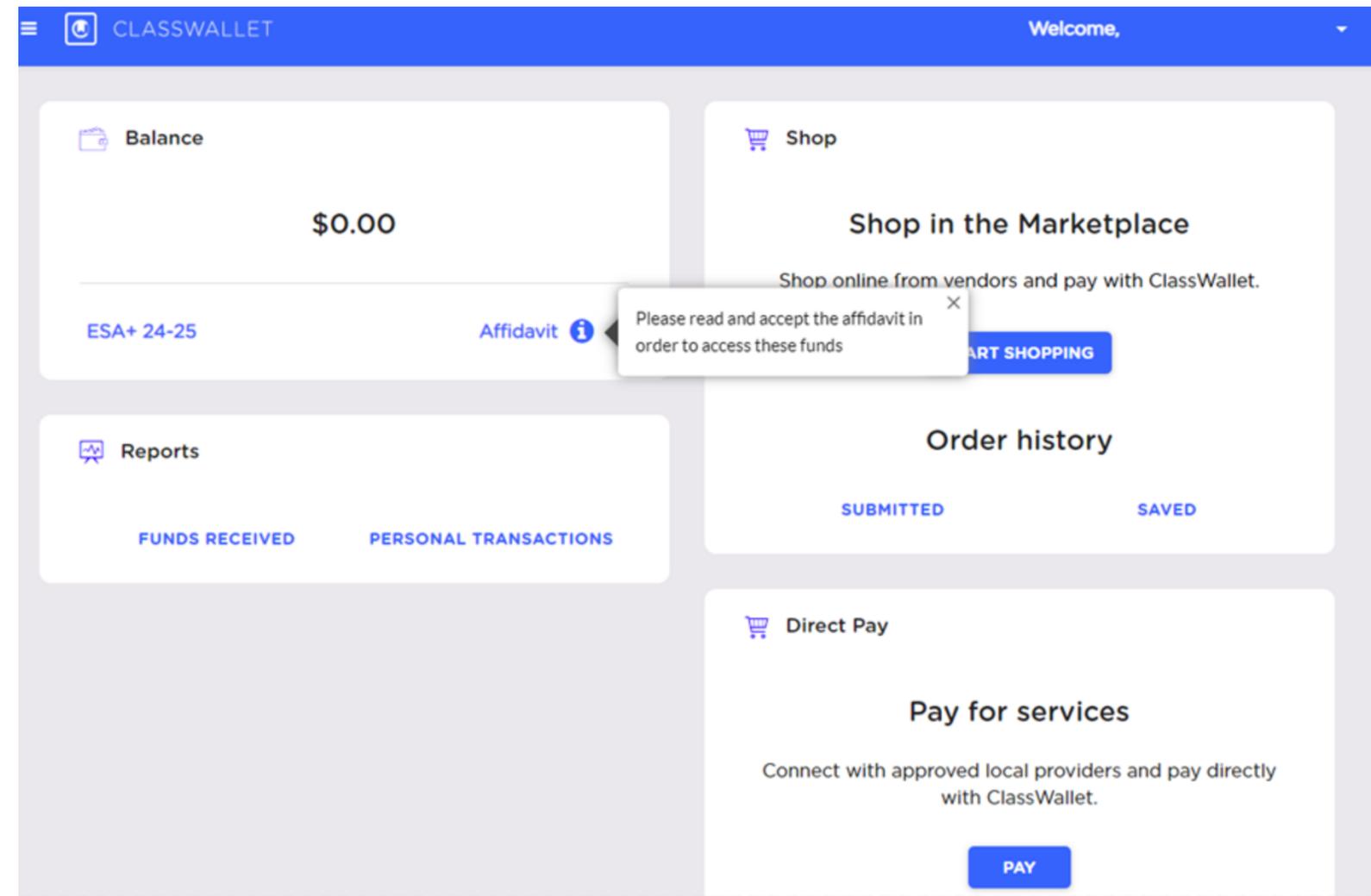
[Forgot Password](#)
[Support](#)

I'm not a robot 
reCAPTCHA
[Privacy](#) - [Terms](#)

First time user click here

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

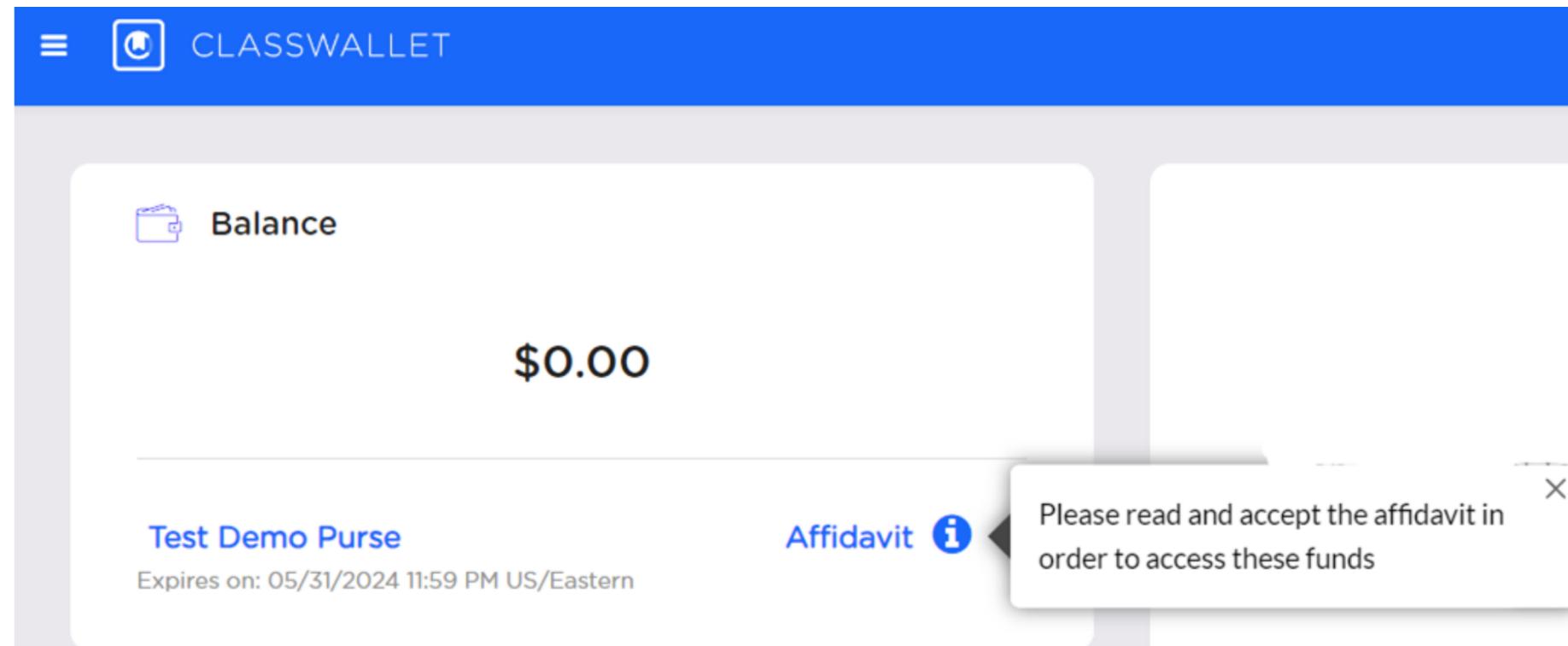


View the Affidavit

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.



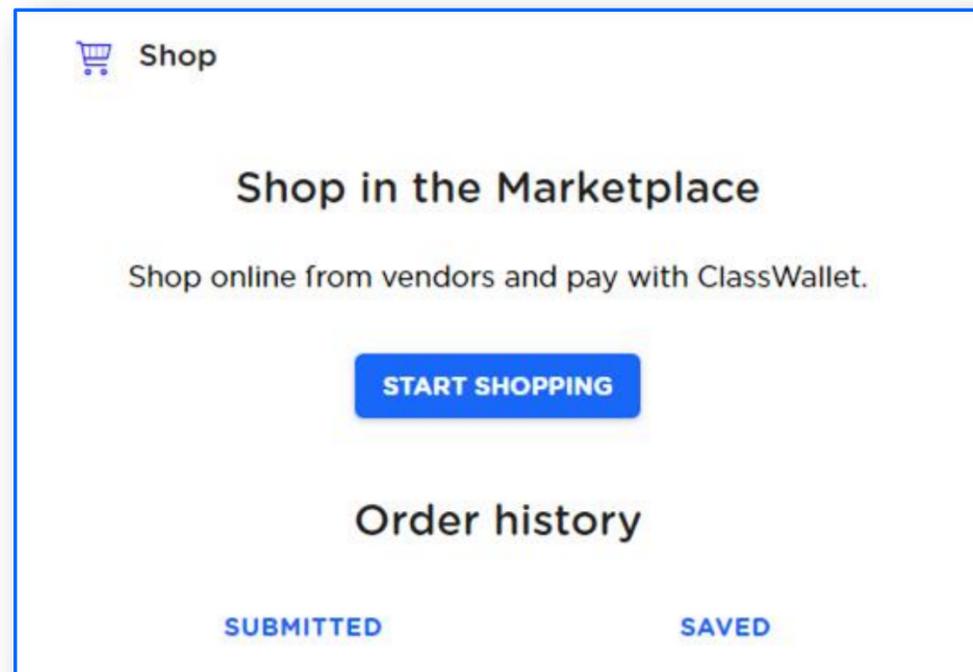
Accept the Affidavit

Affidavit Options:

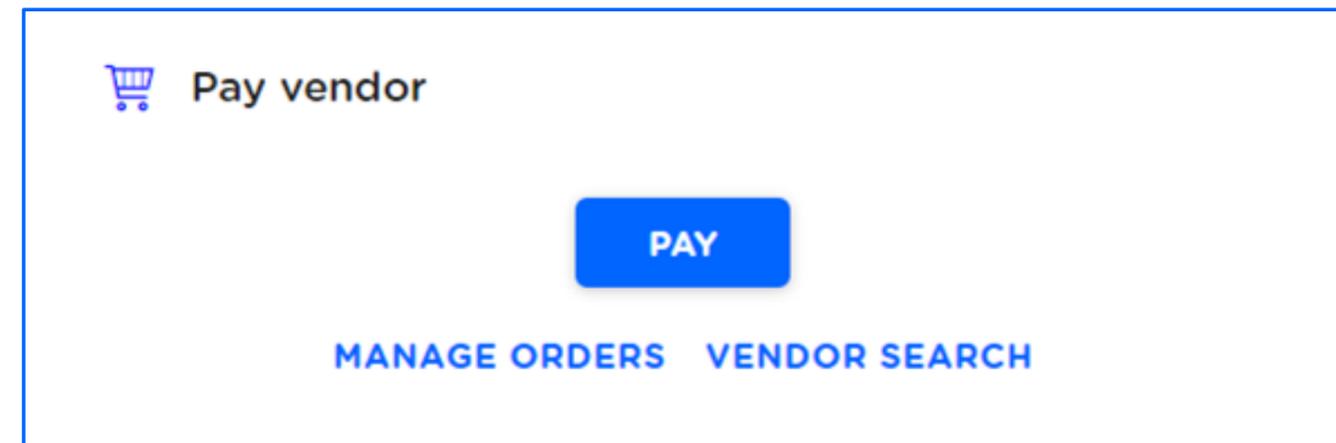
- **Accept** – You will see your account balance displayed and can begin to place orders.
- **Skip for Now** – You will be taken to your ClassWallet account, but your balance related to these funds will display \$0. You must click on the blue “Affidavit” link in order to display the affidavit and “Accept” 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.

Ways to Use Your Funds

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



How to Shop Online with ClassWallet Partners
and Use Your ClassWallet Funds to
Pay for Your Purchases

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://kleo.force.com/classwallet/s/article/How-to-shop>

Or watch a short 2-minute video here:

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

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

Pay a Service Provider

1 Select Vendor — 2 Add details — 3 Upload Documents — 4 Choose Purses — 5 Expense Type — 6 Review & Submit — 7 Complete

Who do you want to pay?

Search vendors

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

| | |
|--|---------------|
| 1st Choice Therapy, Laredo, Texas | SELECT VENDOR |
| 413 Speech and Language Services, PLLC. - Telepractice, Abilene, Texas | SELECT VENDOR |
| A Place for Speech, Corpus Christi, Texas | SELECT VENDOR |
| A2Z Teletherapy Speech and Tutoring of Texas, Mineral Wells, Texas | SELECT VENDOR |
| Ability Play, LLC, kennedale, Texas | SELECT VENDOR |

If your child's service providers are registered on ClassWallet, you can find them in the "Pay Vendor" module and issue payment. You will need to upload any invoices, statements or other supporting documents (.PDF, .JPEG or .PNG format), so have them ready.

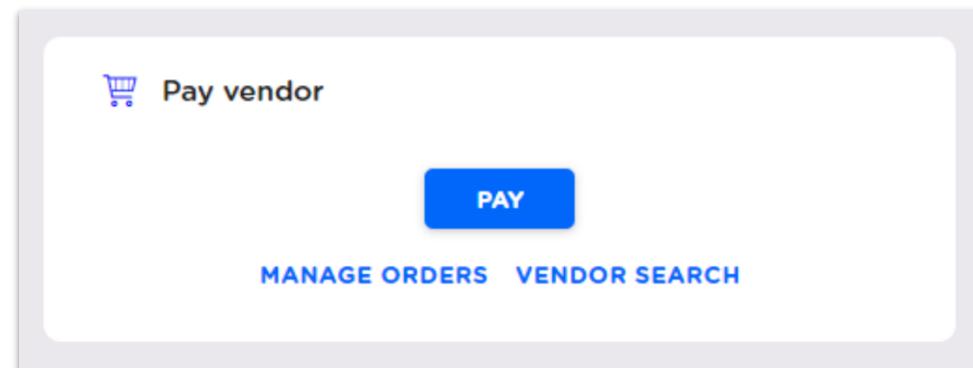
You can view step-by-step instructions here:
<https://kleo.force.com/classwallet/s/article/Pay-a-DirectPay-Vendor>

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

All payments will reviewed by ESA+.

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

Pay a Service Provider



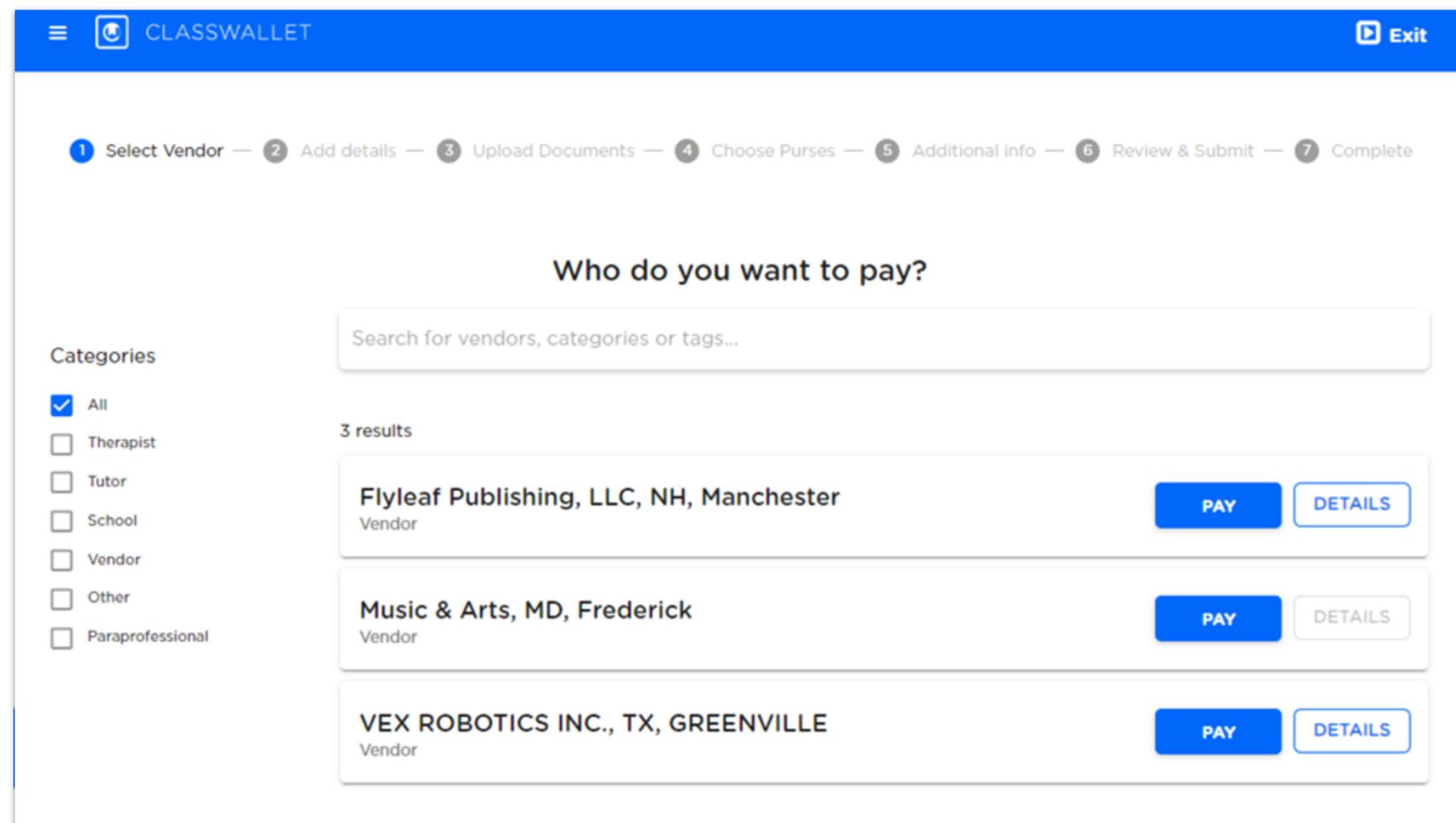
You can find enrolled service providers in the "Pay Vendor" module and issue payment. You will need to upload an invoice containing the [required information](#).

You can view step-by-step instructions here: <https://kleo.force.com/classwallet/s/article/Pay-a-DirectPay-Vendor>

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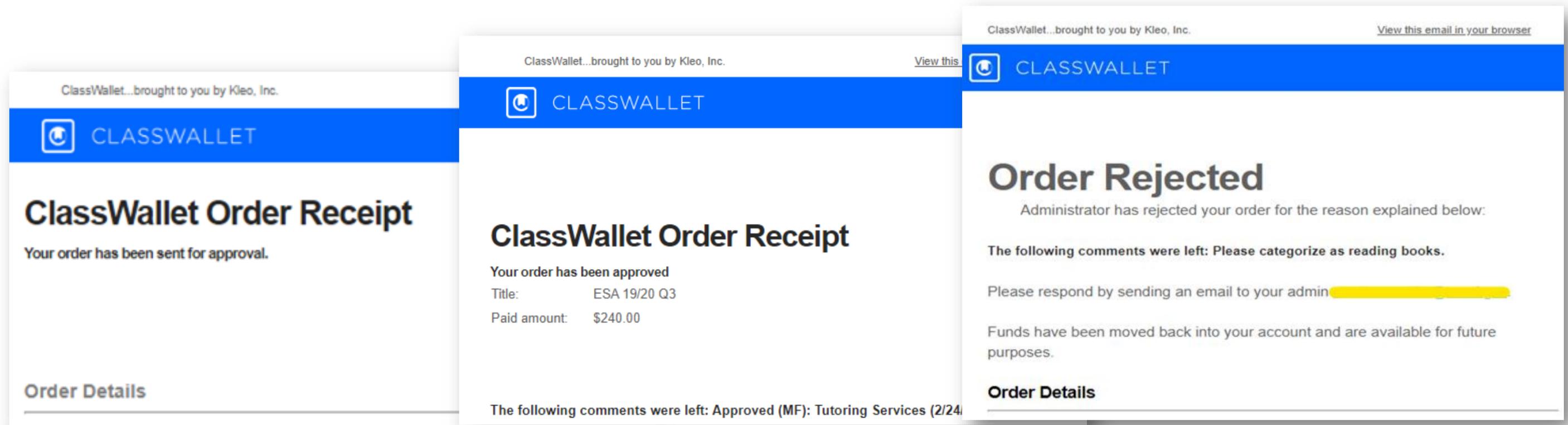
***Please keep in mind these videos and articles may not accurately represent the settings of your specific organization.*



Order and Marketplace 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



Approvals and Rejections

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.

Deadline and Other Important Notes

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

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

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 or by calling (877) 313-1299.

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.

Thank You