



NCSEAA

K12 SCHOLARSHIPS

SCHOOL ADMINISTRATOR HANDBOOK

NCSEAA K12 Scholarship Programs

Supporting School Administrators with Clear, Confident Guidance

Welcome!

Dear Administrator:

Thank you for registering to participate in North Carolina's K12 scholarship programs. As a participating school administrator, you play an essential role in helping families get the information they need to successfully apply for and navigate the state-funded K12 scholarship programs.

This handbook is designed to support you throughout the entire scholarship year. Inside, you'll find clear guidance on program requirements, processes, timelines, along with examples, and answers to common questions about the Opportunity Scholarship and the Education Student Accounts (ESA+) that administrators face.

Our goal is to help you feel informed, confident, and equipped to administer the K12 scholarship programs.

If you have questions that aren't answered in this handbook, we're here to help. Please feel free to reach out to us directly:

919-695-8742
NPS@ncseaa.edu

Sincerely,
Kathryn Marker, Ph.D.
Director of K12 Scholarship Programs
NCSEAA

**View the K12
Scholarships Page for
School Administrators:**



**More about
Opportunity
Scholarship:**



**More about
ESA+ :**



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1 About NCSEAA & Your Role as an Administrator

What NCSEAA Does

NCSEAA has been helping North Carolinians pay for education since 1965. The agency administers two state-funded K12 scholarship programs—the Opportunity Scholarship and the Education Student Accounts (ESA+)—which were created by the North Carolina General Assembly to expand school choice and help families afford nonpublic K12 education.

NCSEAA's work includes:

- Managing applications and award determinations
- Communicating deadlines and program updates
- Processing payments to participating schools on behalf of scholarship recipients
- Providing customer support to families
- Interpreting scholarship program laws and requirements

NCSEAA is the official source for all information relating to the scholarship programs, including program rules and eligibility decisions.

What Schools Do

Schools participating in the K12 scholarship programs are responsible for, including but not limited to::

- Maintaining accurate student rosters related to the Certification, Endorsement, and Disbursement processes
- Submitting required annual documentation, including:
 - Tuition and fee schedule
 - Test scores for the previous school year
 - Graduation data for all high school seniors who received K12 program funds
 - Financial Review (for schools that received funds for 70 or more students during either semester)
 - DNPE Annual Report
- Promptly and accurately submitting information about student withdrawals
- Ensuring your school's bank information is accurate
- Assisting families, which could include:
 - Communicating important information
 - Referring parents to the program website
 - Providing access to a school computer for MyPortal usage
 - Connecting new parents with other families who have experience with K12 programs

Your work ensures students receive the funding they are eligible for in a smooth and timely manner.

2 Programs Overview

North Carolina offers two state-funded K12 scholarship programs administered by NCSEAA. Families may apply to one or both scholarship programs:

Opportunity Scholarship

What is it?

Scholarship funds that help families pay tuition and other required fees at certain nonpublic schools. (Opportunity Scholarship recipients must attend a Direct Payment school)

Who can apply?

North Carolina students entering kindergarten through 12th grade.

How much money is it?

Awards range between approximately \$3,500 to \$7,800 annually, based on family's household income.

ESA+ (Education Student Accounts)

What is it?

Flexible funding that helps families pay for education and services for children with disabilities (this could include tuition as well as allowable expenses such as speech therapy, tutoring, curriculum, and educational technology).

Who can apply?

North Carolina students with disabilities who require special education services (the student's Eligibility Determination from a North Carolina public school will be part of the application process, and updated documentation of the child's disability is required every three years).

How much money is it?

There are two funding levels—the base level is a \$9,000 annual award, while students with certain designated disabilities may be eligible to receive a \$17,000 annual award.



Opportunity Scholarship

Opportunity Scholarship School Choice:



Opportunity Scholarship School Choice:



ESA+

Eligibility Determination:



How to Apply ESA+:



3 The Annual Scholarship Cycle

This section will help you stay on top of application deadlines and other key dates in the scholarship program cycle.

July – August

- Complete annual requirements by July 15
- Certification opens
- Parent orientation: share scholarship expectations

September–October

- Schools complete certification and endorsement
- Schools reconcile payments in portal
- Schools follow up with families who have not endorsed

November–December

- Reconcile and report mid-year withdrawals
- Begin preparing for next year's application cycle

January–February

- Schools and families endorse spring award amounts for current school year
- Opportunity Scholarship and ESA+ new student applications open for next school year
- Families begin submitting new applications
- Tuition and Fee Schedule task opens

March–April

- End of application priority period for new students
- Current scholarship families renew their award for next school year
- Prepare internal rosters for next year
- Expect award notifications for new student applications from NCSEAA
- April 30 - Deadline to complete DNPE annual report

May

- Schools reconcile accounts to ensure scholarship funding is received

Information for
annual scholarship
requirements



4 Submitting a Tuition and Fee Schedule

During Certification, schools report the tuition and fees for each individual student. An accurately itemized Tuition and Fee Schedule is critically important to the Certification process. Discrepancies between the Tuition and Fee Schedule and the cost of attendance certified during Certification for a student may result in payment delays.

What is the Tuition and Fee Schedule?

The Tuition and Fee Schedule provides your school's current, standard tuition and fee rates and billing policies. All Direct Payment Schools must submit a Tuition and Fee Schedule to NCSEAA annually to maintain participation in the K12 programs, regardless of whether scholarship recipients are enrolled in your school for the year for which NCSEAA requests the schedule.

What information should be included in the Tuition and Fee Schedule?

Schools are responsible for clearly providing their current, standard tuition and fee rates as well as billing policies on their Tuition and Fee Schedules. The Schedule must include all tuition and fees charged by the school, regardless of whether the amounts are covered by the K12 Programs and must identify any available or applicable discounts.

Schedules should be comprehensive enough for NCSEAA staff to:

- Compare the reported Schedule amounts to the amounts reported for individual students at the time of Certification
- Easily understand how these amounts were calculated

For more information on the Certification process, visit [Certification and Endorsement on the program website](#).

The Tuition and Fee Schedule must be submitted in MyPortal no later than:

- **July 15th** for returning schools (a task will appear on your school's MyPortal Taskpad in late January)

For more details,
see [Tuition and Fee Schedule](#)



5

Certification: Confirming Enrollment and Costs

Certification is the process of confirming that a student is enrolled in and attending the school and reporting each student's tuition and fee cost. This cost information should be consistent with the Tuition and Fee Schedule submitted in the Portal.

Certification is a required step. As NCSEAA uses the amount you report to determine how much can be paid to your school on behalf of scholarship students, Certification must be completed before NCSEAA can disburse funds for a student. Certification occurs once a year per student, even if the student has more than one program award.

Certification Process:

1

Indicate if the student is enrolled and attending your school for the current school year.

2

Choose the student's Grade Level for the current school year.

3

Review your school's Standard Cost (an annual cost). All dollar amounts should be rounded to the nearest dollar. Do not use a dollar sign (\$), a comma, or a decimal when entering dollar amounts.

4

Enter the Individual Cost for this particular student (an annual cost).

5

Enter the student's Fall Tuition / Fees Owed (first semester cost).

6

Enter the student's Spring Tuition / Fees Owed (second semester cost).

7

If certifying online, the user has to click the Certify checkbox, and then click Save to complete Certification.

8

Repeat Step 1–7 for each student.

If a student is not enrolled and attending your school, schools certify that the student is not enrolled and do not report costs for the student. Click the “Certify” box, certify the student as “Not Attending” your school and then click “Save” to complete Certification.

Certification in MyPortal is available via the “Not Yet Certified” Roster. Rosters have three options:

- **PDF:** View or Print a list of students on the Roster. No data can be entered via the PDF
- **Online:** Enter student cost information via individual student records
- **Download (large batches):** Download a .CSV file, enter student information, upload the file back to certify students in a large batch

Certification Checklist:

Before submitting:

- Confirm costs reported match your Tuition and Fee Schedule
- Ensure all required fees are included
- Ensure no optional fees are included
- Review for accuracy—incorrect certifications can lead to payment delays



For more details, see the official Certification Instructions:



6 Reporting Test Results

Direct Payment Schools are required to submit test results for the previous school year by July 15 for all scholarship recipients in grades 3–12.

Students in 11th grade are required to take the ACT. For grades 3–10 and grade 12, schools must select a nationally standardized test to measure achievement in required subject areas.

Schools should upload test results to the Test Score Portal, not MyPortal. The Test Score Portal will open in April of each year.

Testing and Reporting Process:



Create a Test Score Portal Account

1. Click on the “First time here?” link
2. Select your school from the dropdown list
3. Enter your email address
4. Click “Add User”

Please allow 1–2 business days for the School Support Team to approve your request and send a temporary password to access your account.



Next, upload the original electronic PDF documents provided by the testing companies. (Scanned copies can be accepted if the original document cannot be submitted.) Do not submit hand-graded test results.

Aggregate standardized test performance reports are only required for schools with more than twenty-five (25) 11th-grade scholarship recipients in the semester in which the school administers the test. Aggregate reports will be submitted in MyPortal. Please contact ACT directly for questions about obtaining the aggregate report.

7 Reporting Graduation Data

Schools are required to submit graduation data for all high school seniors who received K12 program funds. Only schools that received funding for a student certified at the 12th grade level will see students listed on their Graduation Roster in the school's MyPortal account.

How to Submit Graduation Data in MyPortal

1. Log in to MyPortal
2. Use the top toolbar to select the school year for which data is being requested
3. Go to "Rosters," and select "All Programs" and "All Terms" in the dropdowns
4. Find the Graduation Roster and choose the "Online" option
5. Has the student satisfied graduation requirements? Select Yes or No
6. Select either "Save" to save results for each individual student, or "Save All" to save your responses for all students on your roster

8 Submitting a Financial Review

Direct Payment schools enrolling seventy (70) or more students who use K12 scholarship funds in either semester of a school year must secure a North Carolina-licensed Certified Public Accountant (CPA) to perform a financial review. Failure to comply may result in a school being deemed noncompliant and ineligible to participate in the K12 Programs.

Students enrolled in both K12 Programs count as one (1) student for the purposes of counting the number of students enrolled.

The financial review:

- Must contain a complete set of financial statements
- Must include a report that indicates the amount of money received in K12 program scholarship funds in the school year, by program
- Must be submitted within 120 days (4 months) of the end of the school's fiscal year
- Must be submitted electronically via MyPortal
- Will be under review for 6–8 weeks from the date the Financial Review is submitted

Financial Review Requirements:



9 Endorsements

Endorsement is the act of officially confirming that the certified costs and resulting award amount to be paid on behalf of the student are correct, as well as verifying that the student is enrolled and attending the school. Endorsement is completed by schools and parents electronically in MyPortal, twice a year, in the fall and spring semesters. Schools and parents should never endorse funding for a student who isn't enrolled in and attending the school.

Schools cannot receive scholarship funds until families endorse their awards through parental endorsement.

Schools must endorse before parents can endorse.

- A) Schools should only endorse "yes" if: the award amount is correct
- B) Schools should only endorse "yes" if: the student is enrolled and attending the school

How to Support Families with the Endorsement Process

- Send endorsement reminders once your school has completed endorsement
- Encourage families to log into their MyPortal accounts regularly
- Give parents access to a school computer so they can log into MyPortal
- Direct any complex questions from families to NCSEAA support



What to expect?

- Some families will endorse immediately
- Others may need reminders
- Endorsement delays will delay payment

Quick Tip: Certification is once per year per student; Endorsement is each semester per student per program.

10 Managing Withdrawals

Student withdrawal information must be submitted within 10 school days of the student's last date of attendance, regardless of whether a K12 scholarship refund is owed. If a refund is owed to NCSEAA, funds must be returned to NCSEAA within 30 calendar days of the student's last date of attendance (most refunds must be made through electronic funds transfer—see below). Schools cannot delay reporting a withdrawal due to a dispute with the family.

When to Report a Withdrawal

If a student has not attended school for 10 consecutive days and you are unable to communicate with the parent, you should assume the student has withdrawn and notify NCSEAA.

Examples of when to report a withdrawal include:

- A student moves or transfers
- A student stops attending
- A family decides not to return
- The school dismisses a student

How to Report a Withdrawal

- Go to the **Student Withdrawal** section under **Recipients** in your school's MyPortal account (this will allow you to complete the withdrawal process for any student who has been certified as enrolled and attending your school)
- Select the pencil icon next to the student targeted for withdrawal
- Click "Withdraw"
- Enter the last date attended and other relevant data in the Student Withdrawal Information form
- Save the update
- Check email for further instructions from NCSEAA.

Common Withdrawal Scenarios

Scenario 1: Student Transfers Mid-Semester

- Report immediately. Do not wait for confirmation from the new school.

Scenario 2: Student Stops Attending but Hasn't Formally Withdrawn

- After the student has not attended for 10 school days, without communication from the family, report withdrawal using the last date of attendance.

Scenario 3: Student Withdraws Before School Starts

- Report a withdrawal if your school certified the student as enrolled and attending and the student does not attend, stops attending, or withdraws. Do not report a withdrawal if your school certified the student as "Not Enrolled".

NCSEAA defines the last date of attendance as the last date the student attended class or submitted an assignment. This may differ from the date the student is determined officially "withdrawn" by the school.



Most Refunds Require Payments via EFT—Here's How to Set up Your School's Account

Your school may occasionally be required to return funds to NCSEAA. Most refunds must be made through electronic funds transfer (EFT), which allows for fast, secure payments. If your school receives payments through ClassWallet for supplemental services, as a registered ESA+ provider contact NCSEAA for assistance with refunds.

Follow these steps to set up your EFT account:

1. Visit the K12 EFT Portal and select "Create New Account"
2. In the Organization field, enter your school's name exactly as it appears in MyPortal
3. Within 72 hours you will receive an email with login information from support@etransfer.com

Next, Link Your School's Bank Account in the EFT Account

1. Open your EFT account and navigate to Tuition Refund Payments (in the navigation menu at the top of the page)
2. Contact your bank: Follow the instructions provided to confirm that your account allows ACH Corporate-To-Corporate debits
3. Link your bank account: Select Payment Methods and follow the instructions to link your account

Make Refund Payments from Your School's EFT Account

1. Open your EFT account. Find Tuition Refund Payments and select "Setup Payments". You will see a list of outstanding refunds owed by your school
2. Select the "Indicate Payment" checkbox next to the name of the student you wish to refund
3. Select "Proceed to Next Step"
4. Review the total amount due. Select "Submit Payment" if everything looks correct
5. You will be prompted to confirm the amount. You must select "Submit Payment" again to complete your payment
6. You will receive confirmation once the payment is complete. Funds will automatically transfer from your bank account to NCSEAA



View Withdrawal Instructions:



Setting up an EFT Account:



11 Understanding Payments

NCSEAA releases payments in scheduled disbursement windows. Payments may be delayed if:

- Tuition amounts were incorrect
- Withdrawal information is overdue
- Parent endorsement is incomplete
- Your bank documents are incomplete
- Your school's legal name or address does not match submitted documents

Reconciliation

After each disbursement:

- Verify the award amounts for each student whose scholarship funds were disbursed. Use the Payment History to view or download the students whose funds were disbursed to your school. Note that disbursements are logged into MyPortal 1–2 weeks before the deposit.

By December 31 (fall) & May 1 (spring):

- Ensure that all students for whom you expected to receive scholarship funds have received their funds. Reconcile your school's student accounts with your semester's disbursements.
1. Ensure that neither the Not Yet Certified nor the Not Yet Endorsed Roster have students listed.
 2. View the Endorsed Roster to see the status of each student, whether paid or not.

Always:

- Review any discrepancies
- Monitor your school's bank account regularly and contact NCSEAA if a payment is missing.
- Follow up with families who still need to endorse.

See more info on
reconciling student
accounts:



12 Updating Bank Account Information

Incorrect or inconsistent bank documentation is a major source of payment delays.

To Update Your Bank Account with NCSEAA:

1. Email NPS@ncseaa.edu to notify NCSEAA of any changes in your banking or tax ID information
2. NCSEAA will add upload links so you can submit several documents to your MyPortal Taskpad.
3. Before uploading, make sure the documents: A) have identical legal names and addresses, B) are clearly scanned (not photographed), and C) are combined into a single PDF

- Documents for upload
 - W-9 Form
 - Vendor Master Form
 - Voided check or bank memo
- Confirm that your school's address is correct in the School Information section of MyPortal
- Program staff will contact you by phone to collect a verbal confirmation once correct documentation has been received

For schools that have received a new Tax ID or EIN number:

- Notify NCSEAA if your school has received a new Tax ID or EIN number
- In addition to the three documents listed above, you will also need to upload the letter your school received from the IRS that confirms the new EIN number

Common Paperwork Issues to Avoid

- City variations (e.g., "Mint Hill" vs "Charlotte")
- Submitting photos instead of scanned documents
- Sending multiple files when a single PDF is required

W9 Form:



Vendor Master Form:



Instructions for MyPortal Document Uploads



13 Communicating With Parents

Schools are often the first place families turn when they have questions.

Best Practices

- Clearly communicate your schools written policies with parents before the school year begins, which may include policies on tuition payments and financial aid.
- Keep explanations clear and factual
- Refer parents to NCSEAA for questions about including but not limited to:
 - Eligibility
 - Award amounts
 - Income documentation
 - Portal issues

Schools should not interpret program rules on behalf of NCSEAA. NCSEAA provides authoritative guidance.



14 Updating HDMA Information

It's important to accurately maintain the data in your school's MyPortal account for your school's staff member with the highest level of decision-making authority (HDMA). Schools may only have two user accounts in MyPortal, one of which must include your school's HDMA.

If the HDMA at your school has changed, you must **notify NCSEAA within 5 business days** of this change, whether a new HDMA has been appointed or there is an interim HDMA.

Additionally, schools are required to take the following steps in order to continue to receive timely communications and payments:

Step 1: Submit a national criminal background check

Direct Payment Schools must submit a criminal background check for their HDMA through CastleBranch. A background check completed by any other means will not be accepted. CastleBranch will deliver the results of the background check to NCSEAA automatically.

Step 2: Complete a MyPortal Credential Request Form (HDMA version)

To establish login credentials for a new HDMA, complete a MyPortal Credential Request Form (HDMA version) and email the form to NPS@ncseaa.edu.

Step 3: Update HDMA Contact Information in MyPortal

Update your new HDMA's contact information in MyPortal so they will receive communication from NCSEAA. This is located in the "School Information" section of your MyPortal account. (Note: Steps 1 & 2 are required—the third step on its own isn't sufficient to make this change.)

CastleBranch:



MyPortal
Credential
Request Form:



15 Administrator Roadmap

If your school is newly registered with the K12 Programs, here's a helpful roadmap to the scholarship year ahead. Note: It's also a good idea to familiarize yourself with the school administrator website.

Step 1: Get Oriented

- Review this handbook
- Log in to your school's MyPortal account
- Watch available training webinars

Step 2: Understand Payment Processing

- Certification
- Endorsement
- Disbursement
- Withdrawals

Step 3: Build Your Internal Process

- Create your communication schedule
- Assign responsibilities to school officials
- Save messaging templates and checklists for easy access

Step 4: Connect With Families

- Share clear expectations
- Offer support with MyPortal navigation

16 Quick Reference Guide

This guide can help you stay ahead of important deadlines and tasks throughout the scholarship year.

Your Weekly Tasks

- Check endorsement status
- Review student roster
- Check for NCSEAA announcements

Your Monthly Tasks

- Reconcile payments
- Prepare any upcoming documentation

Your Annual Tasks

- Tuition and Fee Schedule
- Testing and Reporting
- Graduation Data
- Financial Review*
- DNPE Annual Report

* For schools enrolling 70 or more students who use scholarship funds from the K12 programs for at least one semester during the academic year.

View training webinars



17 Need Help?

This handbook provides information to help your school successfully navigate the K12 scholarship programs. For additional questions or support, NCSEAA's customer service team is here to offer clear, reliable guidance. Want to talk to someone? Our contact information is below.

NCSEAA Support for Schools

Phone: 919-695-8742 (for schools that have registered with NCSEAA)

Hours: Monday-Friday 9AM-3PM

Email Support: NPS@ncseaa.edu

If you are unsure about how to interpret a requirement or respond to a parent question, please reach out to our customer service team for guidance. We're committed to helping schools serve families with clarity, accuracy, and care.

NCSEAA Support for Families:

Phone: 855-330-3955 (K12 Program staff)

On-demand interpreters are available by phone in 230+ languages

Hours: Monday-Thursday 8AM-6PM; Friday 8AM-5PM

Email Support:

MyPortal Login Help

loginhelp@ncseaa.edu

Opportunity Scholarship Help

OpportunityScholarships@ncseaa.edu

Education Student Accounts (ESA+)

ESA@ncseaa.edu

Website: <https://k12.ncseaa.edu/>



K12 Programs Homepage





NCSEAA

K12 SCHOLARSHIPS