



# Navigating Two Programs: Opportunity Scholarship and ESA+

---

North Carolina's ESA+ Scholarship Program



# Helpful Hints for Zoom

*Slides are already posted at <https://www.ncseaa.edu/esa-family-trainings/> 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](mailto: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

# Agenda

Parents of students with awards for both K12 Scholarship Programs have unique challenges. Let us help!

1. Options in each program
2. Differences between ESA+ and Opportunity Scholarship
3. How the \$\$ flows (and when)
4. School Transfers



---

# Program Options

---

# Two Separate Programs

- **The Education Student Accounts (ESA+)** is a program for students with disabilities to attend a nonpublic school (home schools **are** eligible)
- **The Opportunity Scholarship** is an income-based program for students to attend a nonpublic school (home schools **are not** eligible)



# What is a Nonpublic School?

## Public Schools

- Traditional Public Schools
- Magnet Schools
- Charter Schools

## Nonpublic Schools

- Private Schools
- Home Schools





---

# Program Differences

---

# Program Differences: School Choice Options

## Opportunity Scholarship

The school choice must be a K12  
**Direct Payment School**

## ESA+

- May attend a home school
- The nonpublic school can be a K12 **Direct Payment School** or an **ESA+ Reimbursement School**

## PART-TIME ENROLLMENT

**Students who co-enroll in ... will receive...**

- Two private schools: regular award **Opportunity / ESA+**
- Private school and public school: 50% of the award **Opportunity / ESA+**
- Private school and home school: regular award **ESA+ only**



*Home School or Reimbursement School option is available for the ESA+ Program, but not for the Opportunity Scholarship*



# School Choice for Dual Award Students

## REMEMBER

Students who will benefit from both the Opportunity Scholarship and ESA+ ...

- must be enrolled in a Direct Payment School, and
- if part-time, can't be co-enrolled in home school.

# Program Differences: Award Amounts

## Opportunity Scholarship

- SEAA will pay schools on behalf of the student recipients
- Up to \$6,492 (full time, per school year)



## ESA+

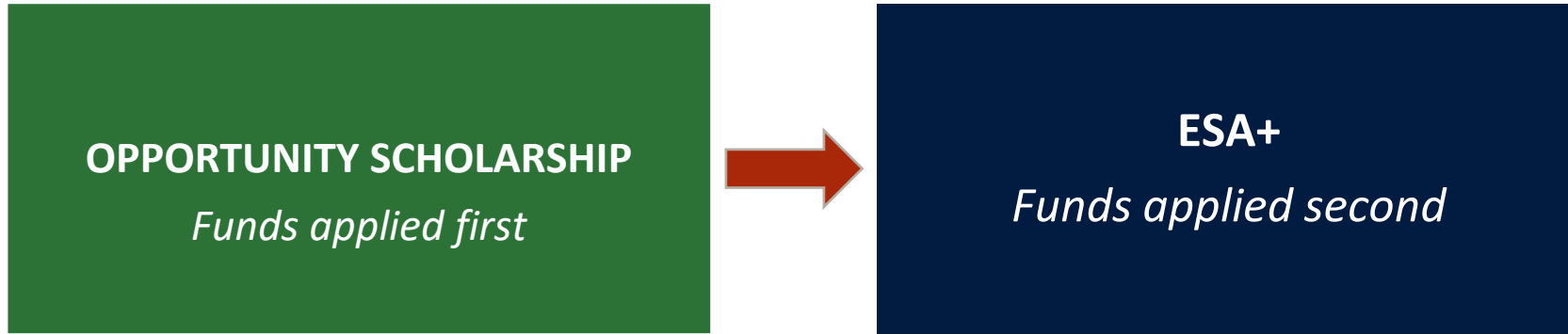
- SEAA will pay schools on behalf of the student recipients
  - Funds remaining after tuition is paid go into an electronic account in Class Wallet for parents to use for Allowable Expenses other than tuition and fees.*
- Up to \$9,000 (full time, per school year)
  - Students with certain designated primary or secondary disabilities may be eligible for up to \$17,000 per full-time nonpublic school student per year.*

---

# Program Funds

---

# Program Funds: Payments



Payment to a school is **program-specific**:

- Opportunity and ESA+ disburse funds directly to schools on behalf of students.
- Schools complete Certification just once per year even if the student has more than one program award. Schools and parents endorse via [MyPortal](#) for each program award, each semester.

# ESA+: Remaining funds to ClassWallet

## After tuition and fees are paid

If your school's reported costs are **less** than your award amounts combined, the remaining ESA+ award funds will move each semester to ClassWallet for you to use for *other* Allowable Expenses.

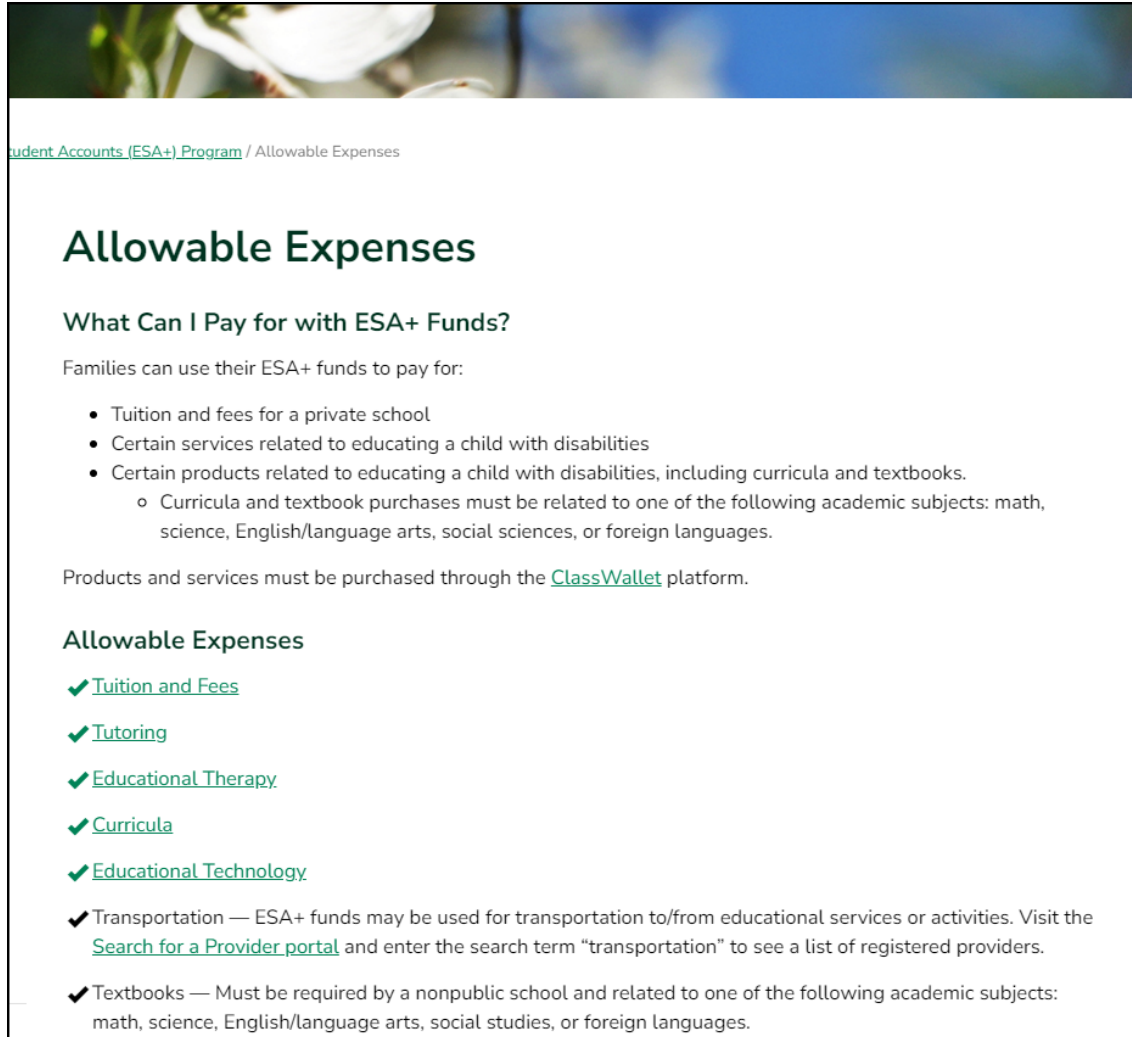
**TIMING:** If your school is efficient with Certification, and your school and you are both efficient with Endorsement, fall funds will be in ClassWallet by mid-September, and spring funds by early February.



# 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





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)

# ESA+: Minimum Spend Requirement

## Reminder!

ESA+ students are required to use at least \$1,000 of their award funds by the end of the school year in order to be eligible for renewing the following year.

*This requirement is met by using at least \$1,000 for tuition, ClassWallet expenses, or a combination of both.*



# ESA+: Minimum Spend Requirement



*When endorsing each semester, check to see how much of the tuition is paid for with ESA+ funds*

- Pay special attention if Opportunity Scholarship covers all or most of your tuition.
- If ESA+ pays less than \$500 each semester, you will need to use funds for other allowable expenses in ClassWallet to reach the minimum amount of \$1,000.





---

# School Transfers

---

- Award funds from the K12 Programs can be sent to a maximum of two schools per semester.
- The amount of funds that can be paid to a 2<sup>nd</sup> school in a semester depends on how long the student attended the 1<sup>st</sup> school.

*To calculate the amount of Opportunity Scholarship and ESA+ funds your student can take to the 2<sup>nd</sup> school, see the chart and explanations under “How To Transfer Schools” <https://www.ncseaa.edu/k12/k12-forms-resources/>*

## School Transfers: *complications for dual award recipients*

- After the school payment disbursement, any remaining **ESA+ funds** will be transferred to the ESA+ student's ClassWallet account.
- In ClassWallet, ESA+ students may use remaining funds for **other Qualified Expenses**.

**Tip:** *If you spend your ESA+ funds from ClassWallet, and then transfer to another school, you will not have ESA+ funds from the semester to apply at the new school.*

**The best time to transfer is between semesters.**

# 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 reimbursement for tuition and fees if attending an ESA+ Reimbursement School)
  - 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).

# CONTACT US



ncseaa.edu



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



**1-855-330-3955**

Monday-Thursday: 8am-6pm

Friday: 8am-5pm

## Summer Training for ESA+ Families

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

Enrollment Options, Updating the Area of Disability, ESA+ Reimbursement Schools, Purchasing Curriculum, Planning for Summer Expenses, Continuing Eligibility, and more ...

**Register to attend live sessions or view recordings at your convenience.**