

Empowerment Scholarship Account (ESA) Information

ESA information

<https://www.azed.gov/esa>

From the AZ Department of Education (ADE) ESA FAQ's:

***What is an ESA?** An Empowerment Scholarship Account (ESA) is an account administered by the Arizona Department of Education (ADE) and funded by state tax dollars to provide education options for qualified Arizona students.*

An ESA consists of 90% of the state funding that would have otherwise been allocated to the school district or charter school for the qualified student (does not include federal or local funding). By accepting an ESA, the student's parent or guardian is signing a contract agreeing to provide an education that includes at least the following subjects: reading, grammar, mathematics, social studies, and science. ESA funding can be used to pay private school tuition, for curriculum, home education, tutoring and more..... Students on ESA cannot be enrolled in a public school (this includes district, charter, and public online programs). This is a violation of the ESA contract.

***Are there application deadlines?** ESA accepts applications online year-round, and the scholarship amount awarded is divided into four quarterly disbursements.*

Q1: July 1 – September 30

Q2: October 1 – December 31

Q3: January 1 – March 31

Q4: April 1 – June 30

***The funding received is based on the quarter that the contract is signed.** For example, if you sign a contract at any point from July 1 – September 30, you'll receive Q1 funding. If you sign the contract from October 1 – December 31, you'll receive Q2 funding, etc.*

From the ESA website, updated FAQ related to H.B. 2853 sheet:

***Q5: How much money will my student receive?** A: The amount varies based on several factors, but approximately \$6,500 for grades 1-12. Kindergarten students receive approximately \$4,000. Students who have a current IEP/MET/504 are eligible to receive additional funding based on their IEP/MET category of eligibility.*

To apply for an ESA, go to: <https://www.azed.gov/esa/eligibility-requirements>

Please note that when applying for ESA under the "Universal" category, you will need to provide the following:

- 1. Student's Birth Certificate*
- 2. Proof of Residency Document in the Applicant's Name (parent/guardian applying)*

The ESA contract is between the AZ Department of Education and your family. The school does not have any access to ESA's data, your ESA or ClassWallet account. Our only involvement is receiving the payments you may send to us and applying them to your child's tuition balance in FACTS. We strongly encourage you to go to the Arizona Department of Education ESA website and read the Parent Handbook, FAQ's, etc. so you understand the rules, laws, and regulations regarding the ESA program. If you have questions, you will need to talk to ESA directly. Please note, you will need to sign a new contract with ESA each school year.

Families are responsible, not the school, for ensuring that they are following the rules, regulations, and laws regarding their ESA accounts. Please see the note from the Diocese of Phoenix at the end of this page.

Please feel free to reach out to our business office with any questions but do keep in mind that for many ESA questions (example, about ClassWallet, applying, funding, etc.) we may need to direct you to ESA, or for STO (i.e., CEA, IBE, APESF, ATC, etc.) questions to your STO.

Families that use STO's (ie. CEA, IBE, APESF, ATC, etc.), note the following:

From the Arizona Department of Education to ESA Account holders on May 5, 2023:

For those of you who will choose a private school please note that beginning July 1, 2023, you will need to choose between an ESA or an STO (tax credit scholarship). You will not be able to use both in the same contract year (July 1 to June 30). If you have any questions, please contact the ESA office at 602-364-1969.

From page 55 of the ESA 2023-2024 Parent Handbook:

Receiving an STO or Tax Credit Scholarship

Pursuant to A.R.S.§15-2402(B)(3), the Account Holder agrees not to receive any STOs or tax credit scholarships in the same contract year as an ESA.

Using ESA funds for tuition

ESA's new policy states that starting July 1, 2024, families will no longer be able to be "Reimbursed" through ClassWallet for Tuition payments. (This does not apply to other qualifying payments, tuition only). Families will have to use the "Pay Vendor" option in ClassWallet to have ESA funds they want to be used for tuition sent directly to the school.

With this news from ESA, please note the following policies regarding using ESA funds to pay for tuition at our school, which will be put into place beginning July 1, 2024.

- 1. We will put the student's tuition on a quarterly payment schedule (The 20th of the month July, October, January and April) and on hold, once the family provides a copy of the signed 2024/2025 ESA contract for the student to our Business Office, Laura Bentzin, lbentzin@saintjohnxxiii.org. We will require a copy of the signed contract each school year.**
- 2. Any tuition amount that is owed over the amount the school will be receiving from ESA will be divided into monthly payments and automatically withdrawn through the families Facts account on the 20th of each month July through April.**
- 3. The expectation is that within 2 days of the student's Class Wallet account being funded for the quarter (July, October, January, and April) the family submits the Pay Vendor request in ClassWallet. ESA has stated they will now also be letting vendors know when ClassWallet accounts have been funded. ESA has committed to a 14-day approval process.**
- 4. If the funds are NOT received at our school within 16 days of the ClassWallet account being funded, families will be billed 1 month of tuition (total tuition rate divided by 10 months) via their FACTS account 3 business days later, and each subsequent month until the account is resolved.**
- 5. The school will not reimburse any tuition payment(s) the family makes due to the student having an ESA or pending ESA funds.**
- 6. The amount we receive from ClassWallet will be applied to the student's first available tuition payment in Facts.**
- 7. If we cannot apply all or a portion of the amount sent to us for the student, it will be returned to ESA/ClassWallet. We cannot hold the funds for future use or apply them to a different student.**
- 8. For Step-by-Step directions on the Facts documentation families need to submit to ClassWallet for a Pay Vendor transaction, please see our school website:
<https://saintjohnxxiii.org/empowerment-scholarship-account-eans-information/>**

As ESA's policies may continue to evolve and change, so may ours, so please read your emails/newsletters from ESA, the ESA website, and refer back to this site frequently for any changes to how we are working with families using ESA.

– ESA payments do not automatically happen, you must login to your ESA ClassWallet account when you receive a disbursement you want to use and request funds are sent to our school.

The school will not refund, back to the family, any tuition/qualifying expenses families have personally paid for the school year due to the student having an ESA or pending ESA funds.

– **ESA overpayments will be sent back to ESA/ClassWallet.** If we cannot apply the full amount sent to us, it will be returned to ESA/ClassWallet. We cannot hold the funds for future use or apply them to a different student. Therefore, if you are sending funds to our school for tuition, please make sure you are not sending over more than the remaining tuition amount due for the school year. This can be found in your Facts account under the “Balances” tab. You can also call the business office if you want to verify the remaining amount due for the school year. Keep in mind the time it will take for us to receive the funds.

– Any questions about your ClassWallet account will need to be directed to ESA or ClassWallet. The school has no access to or involvement with your ClassWallet account.

Facts Financial Documentation

Families can obtain the documentation they need to upload to ClassWallet as proof of tuition due, etc. through their Facts Payment Plan/Financial Account.

To log in to your Facts Payment Plan/Financial portal:

– go to: factsmgmt.com

– Family Log In (located at the top)

– Click on Payment Plans/Financial Aid

– Sign in. (If you have forgotten your username/password, you need to click on “Forgot username/password” and follow it through. If you still are unable to log in, you will need to contact Facts at 1-866-441-4637.

Just a note regarding Facts documentation... we have heard from families that ESA would appreciate it if families would highlight the pertinent information (such as: School name, student name, date or school year, account name (e.g., tuition) and the amount before uploading the documentation, to assist them with their approval process.

Facts Documentation for “Pay Vendor” (sending the funds to St. John XXIII Catholic School):

For ESA funds you want to send directly to the school, you need to show proof that you owe those funds for the student to the school. Please note there is a 2.5% ClassWallet processing fee for Direct Pay to a Vendor. The following are 2 types of documentation families have been telling us they are using. You just need to use one, not both.

“Balances”

- Log in to your Facts Payment Plan/Financial portal (see above)
- Click on “View Details.”
- Under “Term” (towards the top right side), in the drop down select the correct school year.
- Click on the “Balances” tab
- Click on the down arrow next to the student’s name
- Right click on your mouse to print the document. You see it will open a document that will have our school’s name at the top, the students’ name, school year, account, amount due, etc.

Or

“Schedule”

- Log in to your Facts Payment Plan/Financial portal (see above)
- Click on “View Details.”
- Under “Term” (towards the top right side), in the drop down select the correct school year.
- Click on the “Schedule” tab
- Click on “Expand All.”
- Right click on your mouse to print the document. You see it will open a document that will have our school’s name at the top, the scheduled payments, which include the students’ name, date, account, amount due, etc.

A Message from the Diocese of Phoenix Regarding ESA and STOs

NOTICE REGARDING TUITION FUNDING PROGRAMS

The State of Arizona provides several options to assist families in paying for your child’s Catholic education, including the Empower Scholarship Account (ESA) Program and through State Tuition Organization (STO) tax credit funds. These programs are offered through the State and/or through the individual STO, and are not managed by the School.

Therefore, you are responsible for compliance with all terms, conditions to eligibility, and legal requirements related to any programs in which you participate. Please note in particular that pursuant to state law, if you choose to utilize an Empower Scholarship Account, you may not utilize STO funds (or vice versa). The School is not responsible for ensuring your compliance with this or any other term, condition, law or requirement relating to tuition assistance programs.

Furthermore, please be aware that payment of your child's tuition is your responsibility, whether or not you choose to participate in ESA, STO, or any other programs or options to assist your family. These programs may not cover 100% of the cost of tuition and fees, and therefore any outstanding portion will remain your responsibility.