



**Community Supports  
Professional Interest Section Meeting**

January 20, 2022

- Welcome
- Upcoming Events
- Indiana Education Scholarship Account Program
- Transportation Panel
- Section Discussion

## Professional Interest Section Meetings / Professional Development:

- January 20 - Employment Supports (12:30-2:30 PM)
- February 10 - Financial Management (10 AM-Noon) / Human Resources (12:30-2:30 PM)
- February 17 – Child & Family Services (10 AM-Noon)

## Upcoming Member Forum and Board of Directors Meetings:

- January 28 - Member Forum / Board of Directors Meeting
- February 25 - Member Forum / Board of Directors Meeting
- March 25 - Member Forum / Board of Directors Meeting

Registration for each meeting is available 3 weeks in advance. Recordings and materials will be available on the [INARF Member Portal](#) within 2-3 business days following each meeting.



*Alicia M. Boyd, CPA*  
Professional Corporation

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CPAs & Advisors

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## Community Supports

# Indiana Education Scholarship Account Program

Jaclyn A. Guglielmo, Executive Director of Indiana  
Education Scholarship Account Program



# INDIANA'S EDUCATION SCHOLARSHIP ACCOUNT PROGRAM

Jaclyn A. Guglielmo, Executive Director





# MEET THE TEAM

Jackie  
Guglielmo

Ryan  
Locke

Emma  
Vise

Chris  
Vawter

# JACLYN GUGLIELMO, MST, BCBA EXECUTIVE DIRECTOR

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**Bachelor of Arts in Public Policy & Law  
from Trinity College in Connecticut**

**Master of Science in Teaching from  
Fordham University in New York (dual  
degree in Elementary and Special  
Education)**

**Special Education Teacher**

**Board Certified Behavior Analyst,  
licensed in MA and NY**

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**RYAN A. LOCKE**  
**DEPUTY TREASURER OF**  
**STATE**

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**Bachelor of Arts in General Studies**  
**from IUPUI in Indianapolis**

**J.D. from Valparaiso University Law**  
**School**

**Chihuahua Owner**

**Chief of Staff and General Counsel to**  
**the Office of the Indiana Treasurer of**  
**State**



# CHRISTOPHER D. VAWTER, JD DEPUTY GENERAL COUNSEL

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Bachelor of Arts in Political Science from  
Wabash College

J.D. from the Indiana University - Robert  
H. McKinney School of Law

Former Teacher and Prosecutor



# EMMA VISE PROGRAM COORDINATOR

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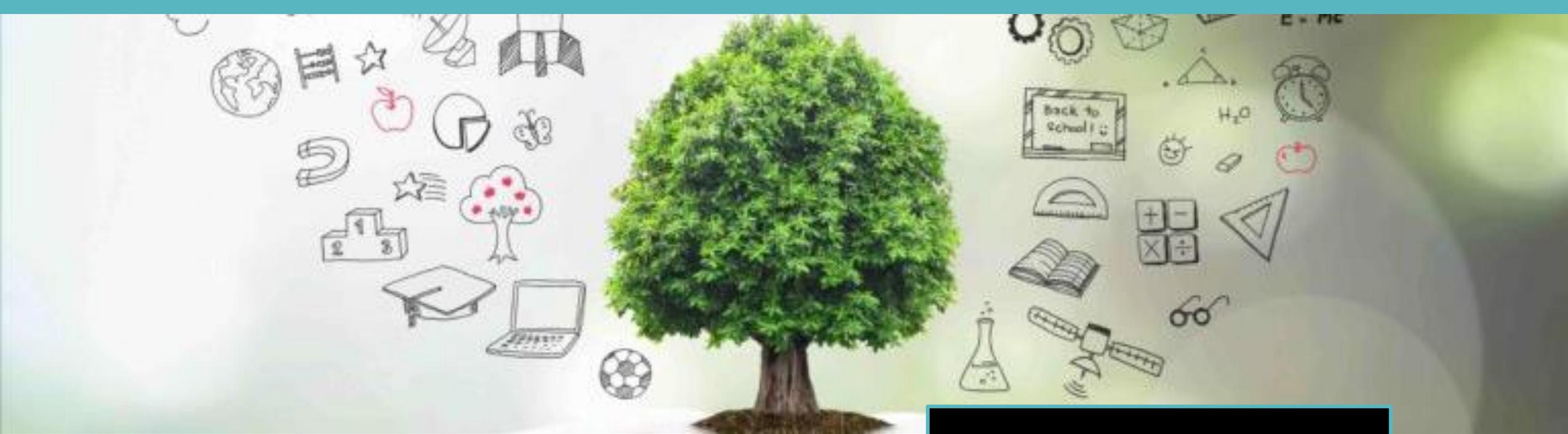
**Bachelor of Arts of General Studies from  
IUPUI**

**Former GED & ESL Teacher with  
Washington Township's Adult Education  
Program**

**Former Customer Service  
Representative at Indiana's Professional  
Licensing Agency**

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# INTRODUCING THE PROGRAM

Overview

Student  
Eligibility

Participating  
Providers

Qualified  
Expenses

# WHAT IS THE ESA PROGRAM ABOUT?

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- The Indiana Education Scholarship Account (INESA) Program was established in 2021, and is projected to take effect in the 2022-2023 school year. This program, administered by the Treasurer of State, is another effort to promote school choice.
- It will provide Indiana's students with disabilities access to scholarship money that may be used for pre-approved educational programs, therapies, services, tuition and fees, and other expenses related to the student's education. These additional funds will help students take advantage of the educational environment that best meets their learning needs.

# SCHOLARSHIPS

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Scholarships can not be counted as income for a family. Therefore ESA would not compromise a family's ability to use other forms of financial aid or Medicaid waiver services.

A student may not use Indiana's Choice Scholarship Program (aka voucher program) AND the ESA in the same school year.

# MEDICAID WAIVER SERVICES

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- Students who are receiving Medicaid waiver may be eligible for an ESA and vice versa.
- Providers can not bill for services simultaneously through Medicaid waiver and ESA. This is double billing, and Medicaid fraud.
- ESA qualified expenses focus on educational services and therapies, while each Medicaid waiver is focused on different categories of expenses.

# REAPPLICATION

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- Both participating providers and students will need to reapply each year.
- Students will need to show proof that they meet the eligibility requirements by uploading documentation such as an IEP or ISP and proof of residency and income.
- Preference will be given to students who are already account holders.

# FUNDING

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The annual grant amount deposited into the student's ESA depends on two factors:

1. The amount of tuition support provided to their local school district per student
2. Whether the family is choosing to have their student's non public school/public school be the special education provider.

# APC (SPECIAL EDUCATION) FUNDING

FIGURES FROM THE 2021-2022 SCHOOL YEAR

Level I  
\$9,614

- Multiple disabilities
- Orthopedic impairment
- Deaf-blind, blind or low vision, deaf or hard of hearing
- Severe intellectual disability
- ASD, TBI
- Emotional Disability with full time placement

Level II  
\$2,415

- Specific Learning Disability
- Developmental delay (ages 5-8 only)
- Mild Intellectual Disability
- Other Health Impairment
- Emotional Disability with all other placements

Level III  
\$500

- Language or Speech Impairment

# STUDENT ELIGIBILITY REQUIREMENTS



Legal Settlement  
in Indiana

Income  
requirement:  
300% FRL

Student with a  
Disability Who  
Requires Special  
Education

Student for  
Whom an IEP or  
ISP has been  
Developed

Student between  
the ages of 5  
and 22 (Aug 1)

# INCOME REQUIREMENT

Household Size	Household Income to Qualify
1	\$71,484
2	\$96,681
3	\$121,878
4	\$147,075
5	\$172,272
6	\$197,469
7	\$222,666
8	\$247,863
9	\$273,060
10	\$298,257

# CAN STUDENTS USE THE ESA WHILE ENROLLED IN PUBLIC SCHOOL?

No. When a student is approved for an ESA, they are disenrolled from the public school. If they re-enroll in the public school, that would result in their ESA account being closed. This includes public charter schools as well.

# CAN STUDENTS USE THE ESA WHILE ENROLLED IN PRIVATE SCHOOL?

Yes. If your student is already enrolled in a nonpublic school, they may apply for the ESA.

Each qualified school must apply to participate in the ESA. Once the applications have been processed for providers, we will make a list of all providers, including qualified schools, available on our website.

# FAMILIES AS SERVICE PROVIDERS

- Families may continue to home educate, however curriculum and curricular materials are not approved qualified expenses.
- Therapy providers need to be individually approved by ESA staff and must present the appropriate certification, licensure or accreditation to provide that therapy.
- Immediate family are not able to pay themselves for qualified expenses.

# PUBLIC SCHOOL RE-ENROLLMENT

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Students may forfeit the ESA and re-enroll in the public school anytime. They must inform their ESA coordinator that they wish to terminate their account and re-enroll in the public school.

ESA Team will notify Department of Education and the pro rated funds will be redistributed back to the public school corporation.

# VOUCHER PROGRAM & ESA COMPARISON

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1. Eligibility
2. Qualified expenses
3. Application timeline and window
4. Funds

In addition, any unused funds from the current year can be rolled over, up to \$1,000 per year.

# ELIGIBILITY

## CHOICE

- Students may be eligible under one of 8 tracks
  - Special education
  - Previous Choice award
  - Previous SGO award
  - “F” public school
  - 2 semesters public school
  - Sibling
  - Pre-K
  - Foster

## INESA

- Student with a disability who requires special education
- and
- For whom an IEP or ISP has been developed

## BOTH

- Legal settlement in Indiana
- Income equal or below 300% FRL
- Between ages 5 and 22 (Aug 1)

# QUALIFIED EXPENSES

## CHOICE

- Tuition and Fees at participating Choice Schools

## INESA

- Tuition and fees at a qualified school
- Statewide assessments
- Educational services for students with disability
- Paraprofessionals and educational aides
- Services contracted through public or charter school (classes, extracurriculars, programs)
- Fee for service Transportation
- Therapies and Services
- ETC...

## BOTH

- Tuition and fees at nonpublic schools

# APPLICATION

## CHOICE

- Families apply directly through the participating Choice School
- Window 1 from Mar-Sept, Window 2 from Nov-Jan

## INESA

- Families apply to the INESA program for approval
- One application window starting in June

## BOTH

# FUNDS

## CHOICE

- At a minimum, Choice Scholarship payments are made once per semester
- The state provides payments **to the school** on the student's behalf.

## INESA

- Quarterly disbursements made directly to an eligible student's ESA account.
- **Parents** of eligible students may use account funds to purchase qualified expenses from a participating entity.
- Funds may roll over, up to \$1,000 per year

## BOTH

- Scholarship award is 90% of state education, plus 100% of special education funds if the qualified school is selected as the special education provider.

# PARTICIPATING PROVIDERS



Qualified School

Individual Tutor or  
Tutoring Agency

Individual or Agency  
that provides  
Services to Students  
with Disabilities

Individual or Agency  
that Offers a Course  
or Program to an  
Eligible Student

Licensed, Certified  
or Accredited  
Service Provider

Entities that Provide  
Assessments

# WHAT IS A “QUALIFIED SCHOOL?”

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According to the definition from the Department of Education, a qualified school is:

**A non public school,**

Accredited by either the state board or a national or regional accreditation agency that is recognized by the state Board of Education,

To which an eligible student is required to pay tuition to attend, and

That agrees to enroll an eligible student

# CAN A PUBLIC SCHOOL APPLY TO BE AN ESA PROVIDER?

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Yes! Though students may not be enrolled in a public school while using an ESA, they may purchase qualified expenses from a participating public school, such as individual classes, extracurricular activities or programs, or additional programs, resources or staffing defined in their child's IEP or ISP.

# CHARGES AND FEES

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By law a provider may not charge a different rate or additional fees for a student paying for services through an ESA.

The ESA Program does not have its own fee structure. When searching for a provider, we encourage families to visit their website and inquire with the provider directly about their cost and any fees associated with services.

# WHAT IF A FAMILY DOES NOT APPROVE OF THE SERVICES THEIR CHILD IS RECEIVING FROM A PROVIDER?

We encourage families to contact the provider directly to resolve any issues regarding the quality of the provider or services received.

Families are responsible for payment of services rendered, pending they meet the specifications outlined in the agreement between the family and the service provider.

# SEARCHING FOR A PROVIDER

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Our portal will have a search function built in where families can search for providers in their area by name and service provided. We will ask providers upon application if they provide any specialized services, and include that in our search function as well.

Through our portal, families will have the ability to “favorite” providers that they want to contact, and an option to type any notes into a text box associated with that provider’s profile.

In addition, when a family clicks on a certain provider in our portal, they will see a photo, logo, and basic information such as address, website and main point of contact.

# CAN FAMILIES SIGN THEIR PROVIDER UP TO PARTICIPATE?

No. Each provider must apply to be approved to receive payments through ESA. There are a few reasons for this, mainly for validating credentials and security through the payment process.

We welcome families to let their providers know about ESA, and to encourage them to apply to participate!

# PROVIDER APPLICATION

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Providers identify what types of services they provide from our list of approved ESA expenses. Then, they would be required to upload documentation, such as a business license, professional license, certification or accreditation proving their scope of practice. Finally, they will be required to sign a provider agreement with conditions for the program. Our team at TOS will review the information provided and approve or deny participation.

# PROVIDER APPLICATION

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We anticipate providers will be able to begin applying in April 2022. Information will be posted on our website at [in.gov/tos/inesa](https://in.gov/tos/inesa), including a link to our application portal.

# QUALIFIED EXPENSES



Tuition and fees  
at qualified  
school

Assessments and  
Examinations

Educational  
services for  
students with a  
disability

Paraprofessionals  
and educational  
aides

Individual classes,  
extracurricular  
activities or  
programs

Services and  
therapies as  
prescribed

Fee-for-service  
transportation

Training  
programs and  
camps with  
specific skill focus

# FUND DISBURSEMENT

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When a student is approved for an ESA, the family will be informed of the total annual grant amount. Funds will be deposited quarterly into the student's account.

Parents will set up the account shortly after being approved for the ESA Program. They will have access to the account through a secure, online portal. This will be the only way families may access their students funds and make payments.

## CAN THESE EXPENSES BE ACCESSED VIRTUALLY?

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This year, a limited number of qualified expenses may be paid for virtually. These are educational services, Occupational Therapy provided in accordance with the student's IEP or ISP, and tuition and fees to attend training programs or camps that have a focus on a number of specific skill areas. Again, that list can be found on our website as well.

# PAYMENT PROCESS

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Either the family or the provider can upload the invoice produced by the provider after services are rendered. The parent then initiates payment by selecting the service provider, and inputting payment amount. Once submitted, our ESA team will review and approve all expenses paid.

Families will not be reimbursed for payments made outside of the ESA payment portal. They will not have access to any debit or credit cards associated with ESA.



**THANK YOU!**

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**Website: [IN.gov/tos/inesa](http://IN.gov/tos/inesa)**

Court House Tree,  
Greensburg, IN



# Community Supports

## Transportation Panel

Yolanda Kincaid, President, Janus Developmental Services, Inc.

Colleen Renie, Executive Director, Village of Merici

Ryan Wilhite, Manager of Special Projects and Regional Mobility Integration, IndyGo

Dan Wolfert, Vice President, Development & Marketing, Hillcroft Services, Inc.



# Community Supports

## Section Discussion

### INARF Community Supports Co-Chairs

Your contributions to the INARF PAC are a critical part of INARF's legislative advocacy efforts. They are used to support elected officials who serve as champions of the provider community. Please consider supporting the INARF PAC today.

For more information and to contribute, visit:

[www.INARF.org/INARF-PAC](http://www.INARF.org/INARF-PAC)



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Thank you!

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