



Individualized Education Account (IEA) Program: New Account Holder Orientation

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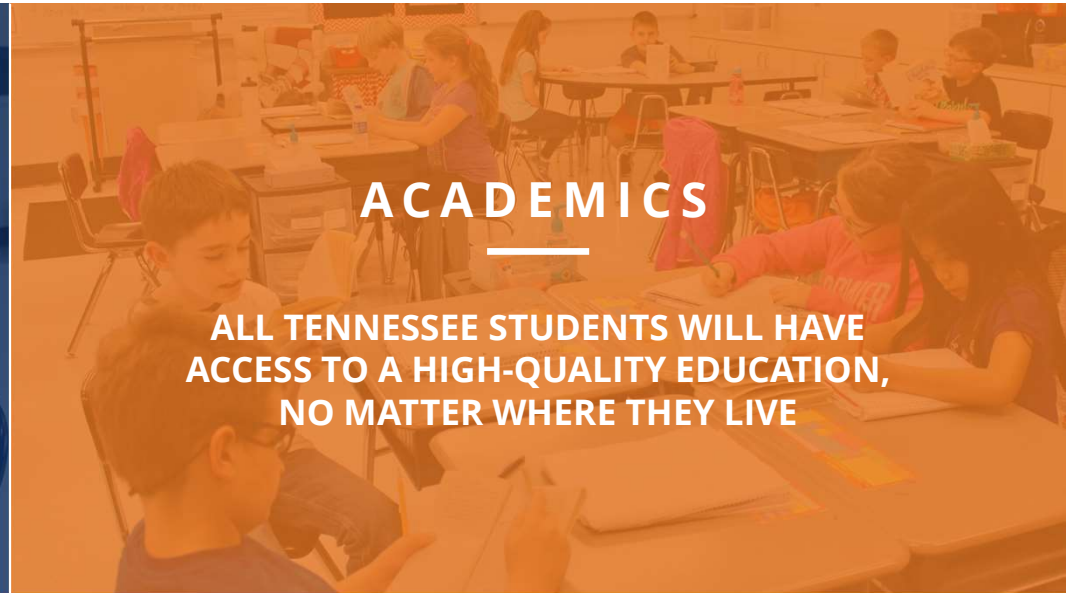
Sr Director of ESA and IEA Programs | Division of Choice





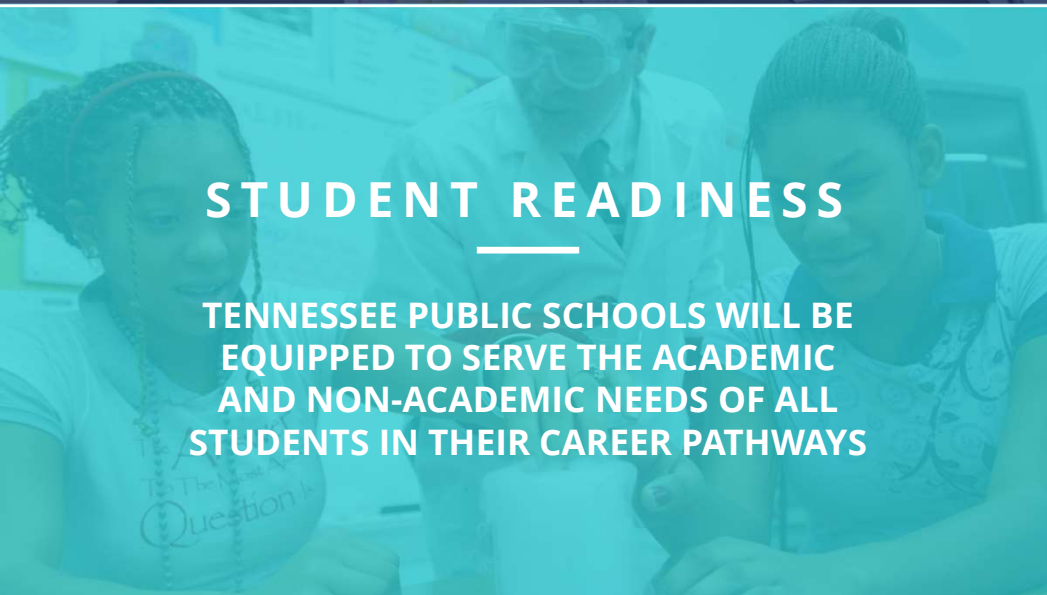
BEST FOR ALL

We will set all students on a path to success.



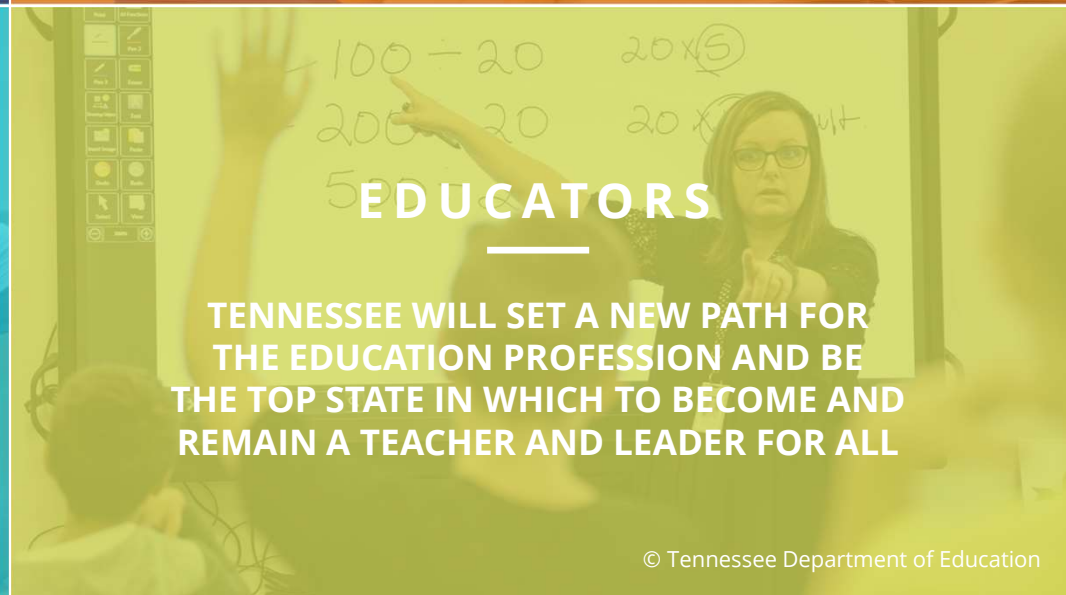
ACADEMICS

ALL TENNESSEE STUDENTS WILL HAVE ACCESS TO A HIGH-QUALITY EDUCATION, NO MATTER WHERE THEY LIVE



STUDENT READINESS

TENNESSEE PUBLIC SCHOOLS WILL BE EQUIPPED TO SERVE THE ACADEMIC AND NON-ACADEMIC NEEDS OF ALL STUDENTS IN THEIR CAREER PATHWAYS



EDUCATORS

TENNESSEE WILL SET A NEW PATH FOR THE EDUCATION PROFESSION AND BE THE TOP STATE IN WHICH TO BECOME AND REMAIN A TEACHER AND LEADER FOR ALL



Agenda

- Navigate the IEA website
- Recall how to access funds
- Recognize approved and non-approved use of IEA funds
- Distinguish expenses that require pre-approval
- Understand the expense reporting process
- Identify when a student is required to participate in state assessments



IEA Program Website

www.tn.gov/education/iea

IEA Program Website

www.tn.gov/education/iea

Homepage

- Announcements
- Contact information
- Office hours
- T.C.A. 49-10-1401 et seq and State Board of Education (SBE) Rule 0520-01-11

Additional information can be accessed via the menu tabs on the left side of the homepage.





IEA Program Website

Forms

- **Account Information**

- Account Holder and Student Information Update
- IEA Student Withdrawal

- **Fiscal**

- ABLE TN Contribution Request
- Coverdell Contribution Request





IEA Program Website

Handbooks

- IEA Account Holder Handbook

Virtual Training Recordings

- Updating account holder and student information
- Pre-approvals
- Scheduling assessments
- Fifty percent spending requirement



IEA Program Website

Parents & Students

- Student application & renewal
- Student eligibility
- Student withdrawal

Resources

- General
 - Key dates
 - FAQs
- Account Holder
 - Steps to establishing an ABLE TN account
 - IEA participating non-public schools list



IEA Program Website

Report Fraud

- Related to the IEA Program

Appeals

- A denial of determination of eligibility
- A denial of an expense paid using IEA funds
- Removal of the student from the IEA Program



Accessing IEA Funds

Accessing IEA Funds

Way2Go Debit Card

- Activate the card, create PIN, or monitor available balance:
 - Mobile app ([Apple Store](#) or [Google Play](#))
 - Online at www.GoProgram.com
 - Call 855-462-5887
- Multiple students?
 - Contact Shelley Johnson at Shelley.R.Johnson@tn.gov
- Keep it safe!



ABLE TN & Coverdell Contributions

ABLE TN

- Must be in student's name
- \$18,000 max annual

530 Coverdell Account

- Financial institute of your choice
- Account holder and student's name
- \$2,000 max annual

Requests for contributions to either account must be made prior to a quarterly allocation; these accounts can only be used for the student's education expenses.



Spending IEA Funds

Approved and Disallowed Expenses,
Pre-approvals, and Expense Reporting



Approved Expenses

- Tuition or fees
 - participating schools
 - eligible postsecondary institution
 - non-public online learning program or course*
- Textbooks
- Tutoring services*
- Curriculum
- Transportation
- Fees for achievement tests/examinations

*requires pre-approval





Approved Expenses

- Contributions to Coverdell and/or ABLE TN
- Educational therapies or services*
- Contracted services with a public school
- Fees to manage the IEA by private financial management firms
- Computer hardware and tech devices*

*requires pre-approval



Disallowed Expenses



Furniture

Desks, workstations, storage cabinets, carts, etc.



Consumables

Paper, pencils, pens, markers, crayons, erasers, folders, glue, backpacks, magazine subscriptions etc.



Medical-related items & services

Medicines and/or supplements, medical services, acupuncture, nutritionists, etc.



Some experiences

Field trips, extracurricular fees, athletic fees, etc.



Certain services

Yoga, music, art, dance, before-and after-school care, physical fitness, lessons, classes, etc.



Add-on technology & some equipment

Cloud services, internet services, televisions, cable services, software, Office suite, binding machines, musical instruments, visual art equipment, etc.



Animals/supplies

Farm animals or pets and/or supplies, etc.

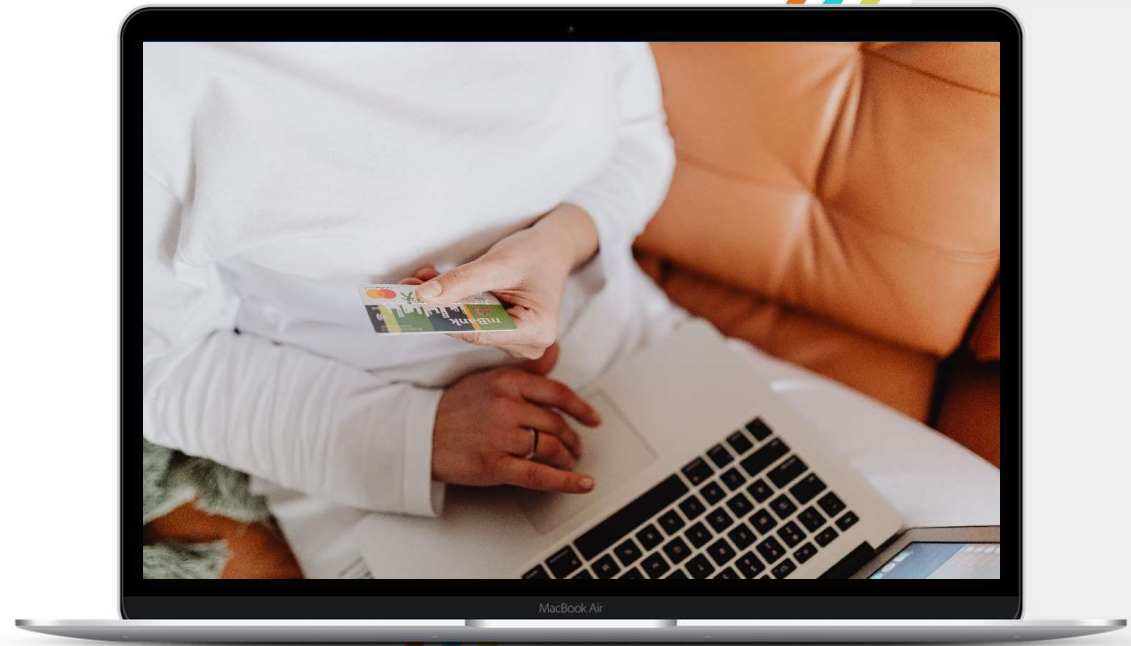


Personal transportation

Mileage or car expenses

Expense Reporting

- **All** expenses paid must be reported
- Itemized receipts must be submitted
 - Date
 - Name
 - Description
 - Amount
 - Refunds (if applicable)

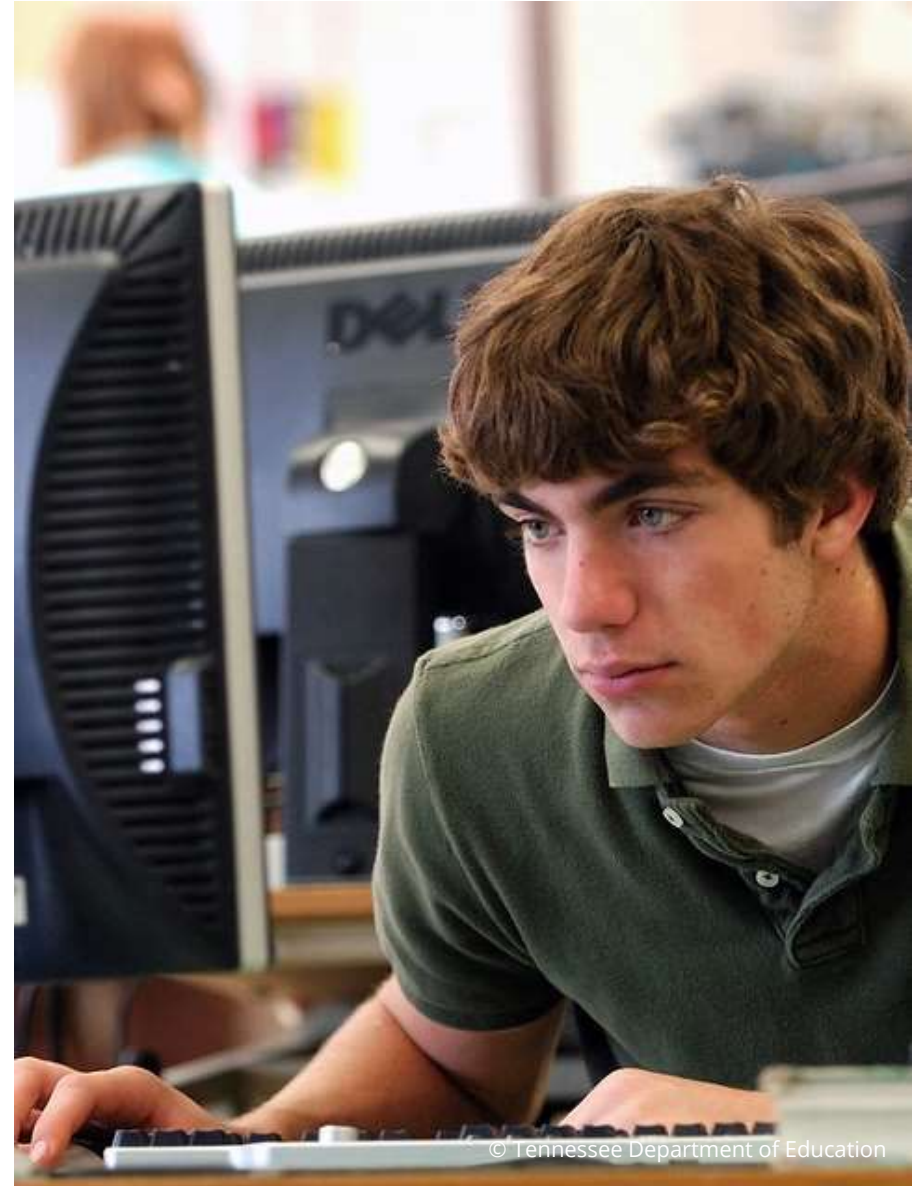


Student Assessments & Reporting

Testing Requirements

- Students in grades 3-8
- Nationally norm-referenced test(s) or TN Comprehensive Assessment Program (TCAP) tests
 - Math
 - English language arts (ELA)

Students are exempt from testing if they would have participated in the TN Alternate Assessment, as determined by their most recent IEP.





Key Takeaways

- Familiarize yourself with the [IEA website](#) and the [IEA Account Holder Handbook](#).
- Enroll your student(s) in a:
 - participating non-public school,
 - home school umbrella program, **or**
 - independent home school.
- Identify key dates and deadlines.
- Watch for the Way2Go debit card.
- Receive approval from the department before making certain purchases.
- Save all receipts from purchases made with IEA funds.
- Look for our emails throughout the year!



Questions & Answers

The remainder of our time will be for questions and answers.





Thank You!

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