

Hope Scholarship Reimbursement Policy Adopted by Motion on August 9, 2023

During the June 5, 2023, meeting, the Board authorized staff to approve reimbursement requests when certain extenuating circumstances exist and to deny other reimbursement requests.

Since our last meeting, Board staff has received a number of inquiries and reimbursement requests for academic curriculum that is not available on MyScholarShop. Board staff has learned that some of the most prevalent homeschool curriculum providers do not participate in any ESA program in the country, and similarly, have elected to not participate in West Virginia's program. Board staff also learned that because of this issue, some states allow *limited* reimbursements for academic curriculum that is not available in the states' ESA portals. Reimbursements for "off the shelf" curriculum are considered to present a relatively low risk for fraud and are administratively easy to process, since the providers are well-established, and curriculum fits well within the definition of a qualified expense.

Additionally, parents often need to order curriculum months ahead of the beginning of the school year, when funds become available, in order to receive it in time for the school year.

Reimbursement requests will only be considered under the following extenuating circumstances:

1. Due to a *documented* disability or other specialized educational need, such as a Career Technical Educational course, a student requires a particular educational service, supply, or specialized piece of equipment and a substantially similar service, supply, or piece of equipment is not offered by an approved Hope Scholarship education service provider or vendor.
2. *Documented* EMA malfunctioning, malfunctioning of Board-administered IT resources, or Board procedural errors significantly prevented the ability to timely pay an approved Hope Scholarship education service provider or vendor, through no fault of the account holder, and timely payment was necessary to continue to receive said provider or vendor's services without disruption to the student's education.
3. The out-of-pocket purchase for **off-the-shelf curriculum** defined as lessons and academic content taught in a specific course, program, or grade level, including supplemental materials directly related to the course of study that is widely and immediately available and not customized or designed for a particular student. Examples include, but are not limited to, the following:
 - Textbooks (including electronic)
 - Workbooks (including electronic)
 - Student/Teacher Curriculum kits
 - Student/Teacher Curriculum Educational videos, DVD's, or CD's
 - Activity/Learning or Study guides
 - Teacher Curriculum Lesson plans

Board staff are authorized to approve reimbursement requests when one of the three extenuating circumstances described above is present. Any other reimbursement request, listing an extenuating circumstance not outlined above, will be brought to the Board for its consideration on a case-by-case basis and the opportunity to provide direction to Board staff.

Board staff are authorized and directed to deny reimbursement requests based on the following circumstances.

1. The student or account holder prefers a particular educational service, supply, or piece of equipment that is not offered by an approved Hope Scholarship education service provider or vendor.
2. The account holder chooses to pay out-of-pocket for a qualifying expense (other than off-the-shelf curriculum) and later wishes to be reimbursed with Hope Scholarship funds, and the request clearly fails to indicate the existence of extenuating circumstances as determined by Board staff.
3. The account holder purchases the item prior to Hope Scholarship funds being available in the student's EMA account, even if the item would have otherwise been considered for approval.