ONLINE EXPENSE PORTAL

TUTORS, THERAPISTS & PARAPROFESSIONALS

ARIZONA DEPARTMENT OF EDUCATION |ARIZONA EMPOWERMENT SCHOLARSHIP ACCOUNT

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INTRODUCTION

The purpose of this manual is to outline the steps required for completing a tutoring, educational therapy, or paraprofessional expense entry, once the user is logged into the Applicant Portal:

1.0 Select Student on the **Home Screen** 4

2.0 Click "**Enter Expense**" to Begin the Expense Entry 4

3.0 Choose the **Expense Type** 5

4.0 Enter Payment Information 6

5.0 Enter Credential Information 6

  5.1 Tutoring Services 6

  5.2 Educational Therapies and Services 7

  5.3 Paraprofessionals 7

6.0 Upload or Select the Credential 8

7.0 Confirm Status says, "**Complete**" 8

  7.1 Fixing and Deleting Entries 8

8.0 Submit the Report or Make a New Expense Entry 9

HELPFUL LINKS

- Applicant Portal Registration Instructions: Steps for registering for the ESA Applicant Portal
    - An account is required for accessing the online expense reporting system

- Glossary: Definitions of common words and terms used throughout the online expense reporting system

- Selecting an Expense Category: Guidance for choosing the appropriate expense type

- Troubleshooting & Fixing Entries: Help for correcting incomplete entries

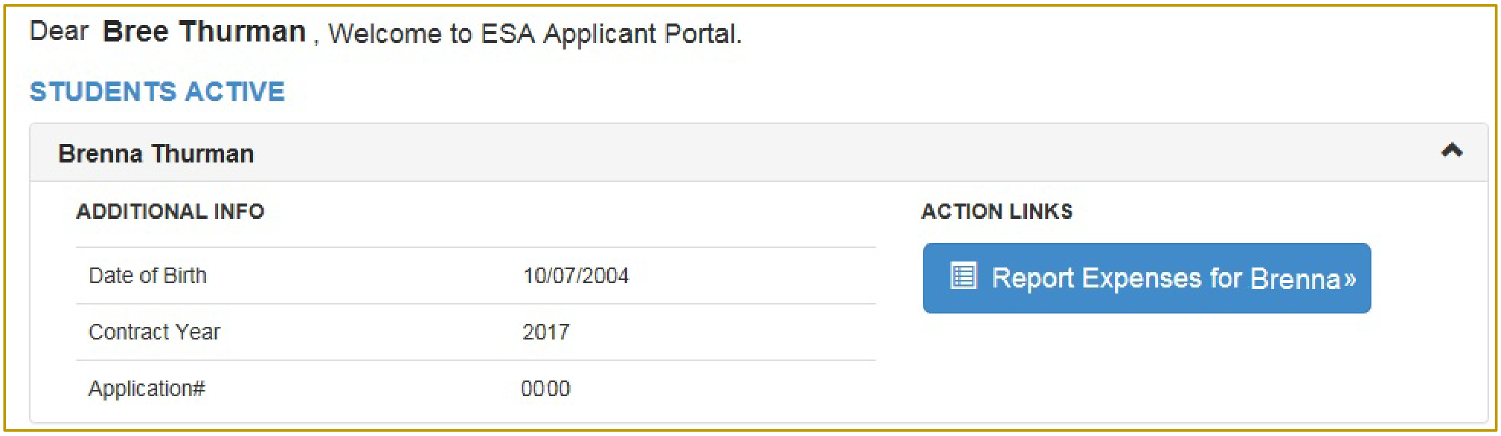
- Uploading Credentials & Receipts: Suggestions for saving copies of credentials and receipts on your computer

All ESA Training Documents are located at: http://www.azed.gov/esa/training/

1.0 Select Student on the **Home Screen**

After logging into the Expense Portal, applicants will see their students listed on the Home screen (**Figure A**). Clicking the Home button at the top of any subsequent screen returns to this screen.

Click the blue **Report Expenses** button to begin (or continue) an expense report for a student.



Dear **Bree Thurman** , Welcome to ESA Applicant Portal.

STUDENTS ACTIVE

Brenna Thurman

ADDITIONAL INFO

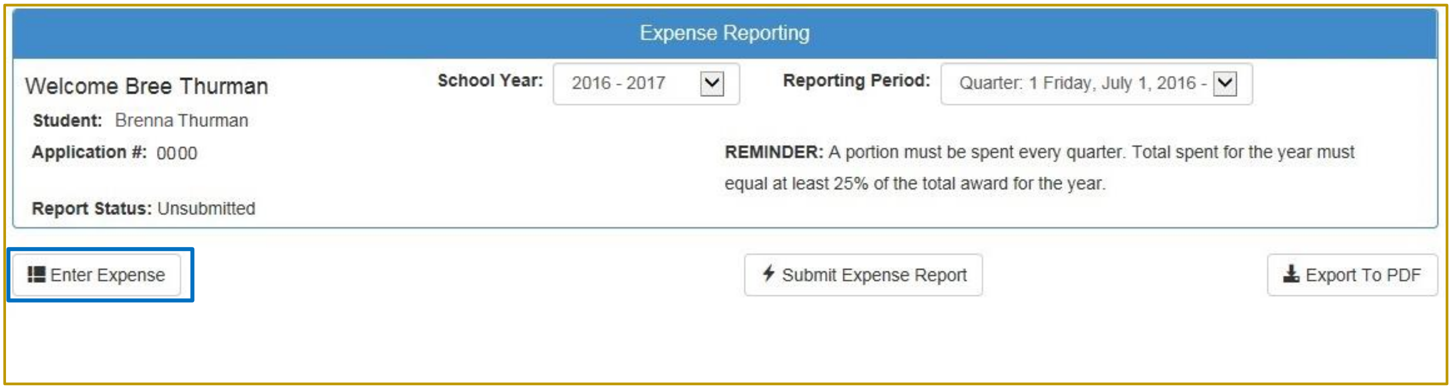
Date of Birth	10/07/2004
Contract Year	2017
Application#	0000

Figure A

2.0 Click "**Enter Expense**" to Begin the Expense Entry

A blank screen, as shown the screenshot below, indicates that this is the first expense entry. Once an expense entry is started (and the information is saved), they will appear on this screen (**Figure B**).

Click the **Enter Expense** button (shown in the blue box) to begin the expense entry.



Expense Reporting

Welcome Bree Thurman

Student: Brenna Thurman

Application #: 0000

Report Status: Unsubmitted

School Year: 2016 - 2017

Reporting Period: Quarter: 1 Friday, July 1, 2016 -

REMINDER: A portion must be spent every quarter. Total spent for the year must equal at least 25% of the total award for the year.

Figure B

➢ **Tips:**

- If correcting (or entering) expenses from a previous school year, choose the previous year from the **School Year** drop-down menu
- If correcting (or entering) expenses from a previous quarter, choose the quarter from the **Reporting Period** drop-down menu
    - If the previous quarter was in the prior school year, select the appropriate school year first

3.0 Choose the **Expense Type**

After clicking the **Enter Expense** button, a pop-up window (**Figure C**) displays with the available expense categories; options on this menu vary depending eligibility. S=

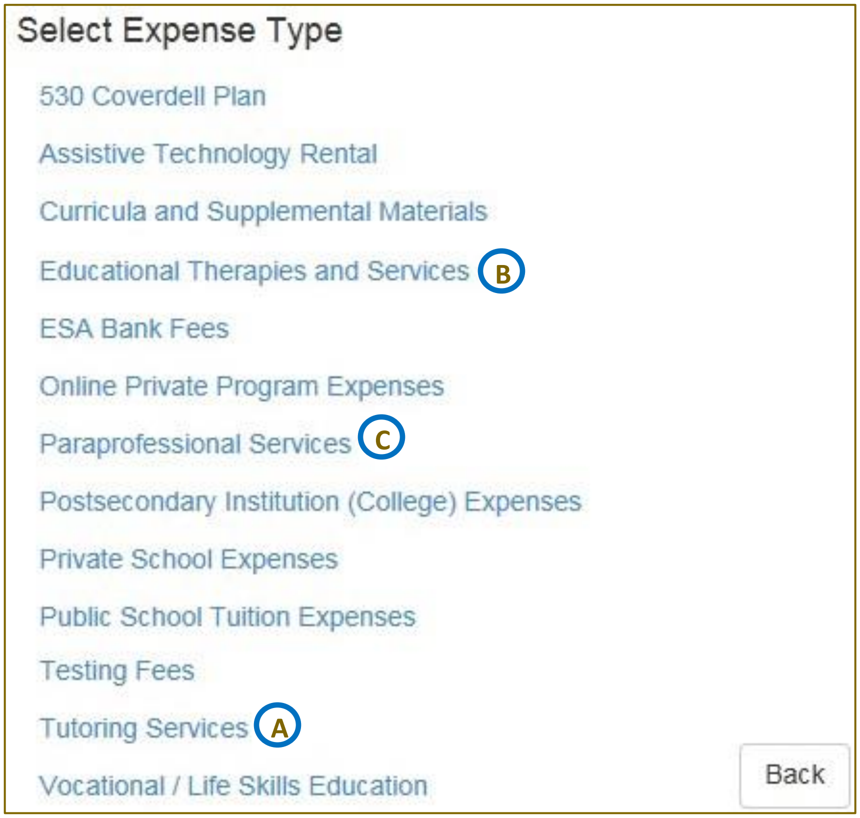

Select Expense Type
530 Coverdell Plan
Assistive Technology Rental
Curricula and Supplemental Materials
Educational Therapies and Services
B
ESA Bank Fees
Online Private Program Expenses
Paraprofessional Services
C
Postsecondary Institution (College) Expenses
Private School Expenses
Public School Tuition Expenses
Testing Fees
Tutoring Services
A
Vocational / Life Skills Education
Back

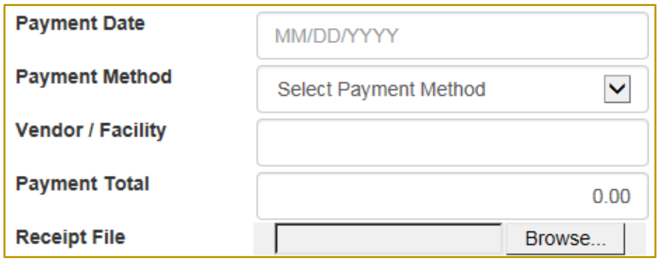
Figure C

➢ **Tips:**

- To enter payment to a tutor or tutoring company, select **Tutoring Services** Ⓐ
- To enter payment to a therapist for an educational therapy, select **Educational Therapies and Services** Ⓑ
- To enter payment to a paraprofessional, select **Paraprofessional Services** Ⓒ
- Click **Back** to close this window

4.0 Enter Payment Information

The first five fields capture details regarding the payment of the transaction. These fields are the same for each category:



Payment Date	MM/DD/YYYY
Payment Method	Select Payment Method
Vendor / Facility	
Payment Total	0.00
Receipt File	Browse...

Figure D

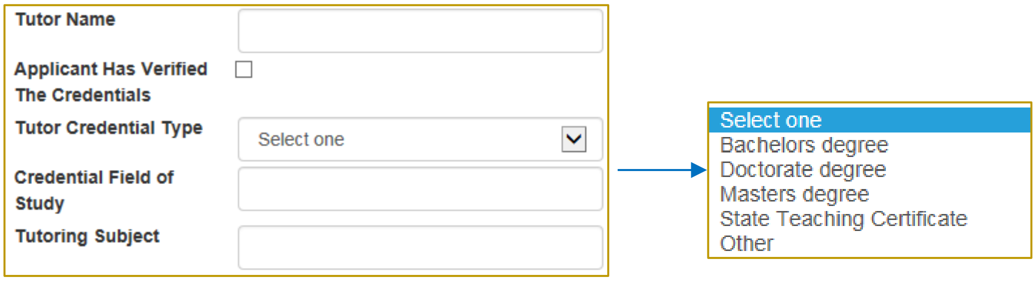
➢ **Tips:**

- Clicking in the **Payment Date** field displays a calendar; select a date from the calendar, or manually enter a date into the textbox instead
- Make sure to enter the date of the payment rather than the date of the invoice
- **Vendor / Facility** is most likely the name of the company providing the service
- **Payment Total** refers to the amount listed on the invoice/receipt
    - Multiple receipts require multiple expense entries

5.0 Enter Credential Information

The remaining fields capture details of the service provider and their credentials. Click **Save** after entering the information.

5.1 Tutoring Services



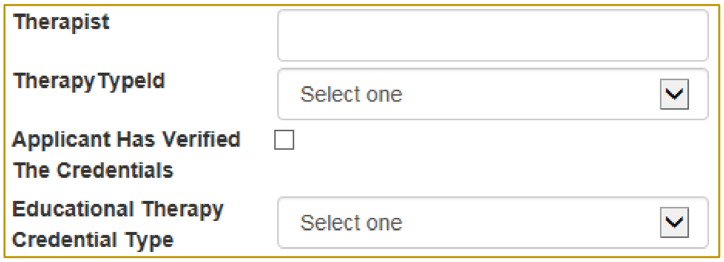
Tutor Name	
Applicant Has Verified The Credentials	☐
Tutor Credential Type	Select one
Credential Field of Study	
Tutoring Subject	

Figure E

➢ **Tips:**

- Provide the **First** and **Last Name** of the tutor
- Core subjects require the tutor to have either a college degree in the subject they are teaching or a state teaching certificate (all options are available in the drop-down menu)
    - Certificates do not have to be issues in Arizona, but cannot be expired
    - Older degrees may not state the specific subject; in the scenario, request transcripts to confirm the tutor is qualified to teach that specific subject
- Extra-curricular subjects require the tutor to have a certificate or license issued by a legitimate agency, or a degree that encompasses the appropriate subject
    - If the credential type is not listed in the **Tutor Credential Type** drop-down menu, select **Other** instead and specify the credential in the **Other Credential Type** textbox that becomes available
    - Confirm certificates/licenses are not expired

5.2 Educational Therapies and Services



Therapist

TherapyTypeId: Select one

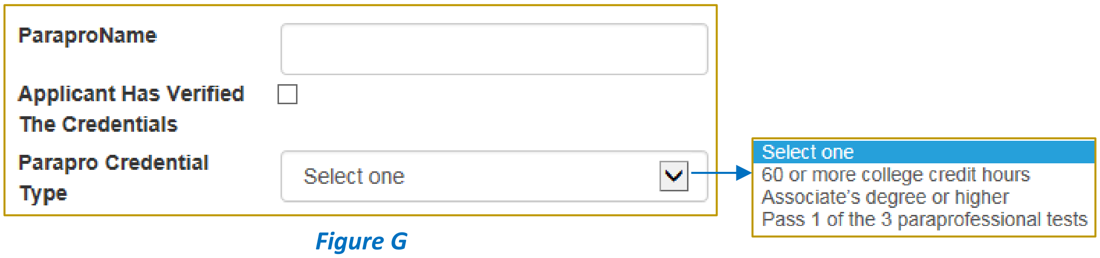
Applicant Has Verified The Credentials ☐

Educational Therapy Credential Type: Select one

Figure F

- **Tips:**
  - Provide the **First** and **Last Name** of the therapist
  - Common therapy types are populated in the **Therapy Typ**e drop-down menu
    - If the therapy type is not listed in the menu, select **Other** instead and specify therapy type in the **Other Therapy Type** textbox that becomes available
  - Appropriate credential types for the selected therapy populate in the **Educational Therapy Credential Typ**e drop-down menu
    - If the credential type is not listed in the menu, select **Other** instead and specify the credential in the **Other Credential Type** textbox that becomes available

5.3 Paraprofessionals



ParaproName

Applicant Has Verified The Credentials ☐

Parapro Credential Type: Select one

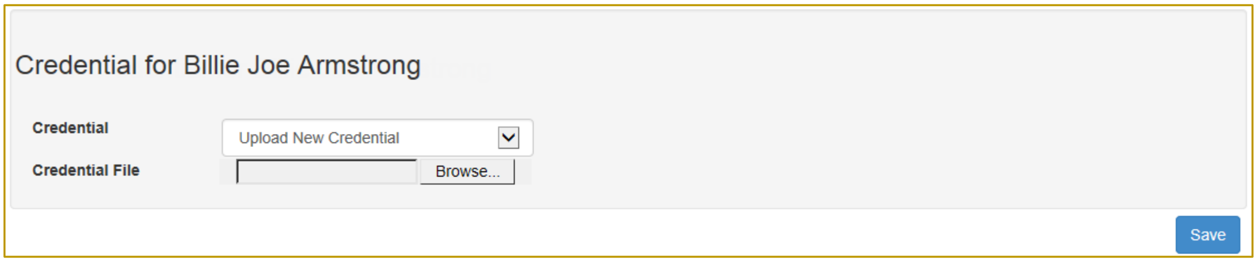
Select one
60 or more college credit hours
Associate's degree or higher
Pass 1 of the 3 paraprofessional tests

Figure G

- **Tips:**
  - Provide the **First** and **Last Name** of the paraprofessional
  - Acceptable credential types are populated in the **Parapro Credential Type** drop-down menu
    - If the therapy type is not listed in the menu, select **Other** instead and specify therapy type in the **Other Therapy Type** textbox that becomes available
      - Transcripts are required for credit hours
      - Results are required for paraprofessional tests (ACT WorkKeys, Paraeducator Assessment, or PRAXIS)

6.0 Upload or Select the Credential

After entering and saving the payment and credential information, the system will require you to either upload a credential, or select a previously-uploaded credential (**Figure H**):



Credential for Billie Joe Armstrong

Credential Upload New Credential

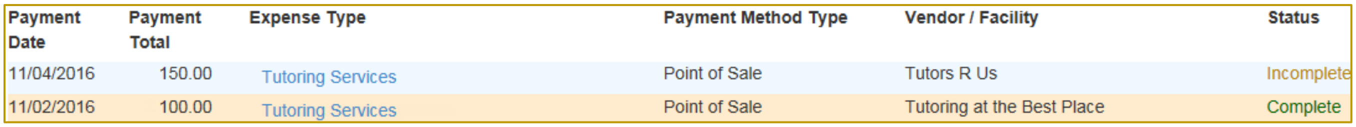
Credential File Browse...

Figure H

- **Tips:**
  - Previously-uploaded credentials populate in the **Credential** drop-down menu
  - Click **Browse** to upload a new credentials
    - This button will read, **Choose Files**, for those using a Chrome browser
  - Click **Save** to complete the expense entry

7.0 Confirm Status says, "**Complete**"

When all the information for an expense entry is provided, the system reads "**Complete**" next to that entry. If something is missing, the status reads, "**Incomplete**" instead (**Figure I**).

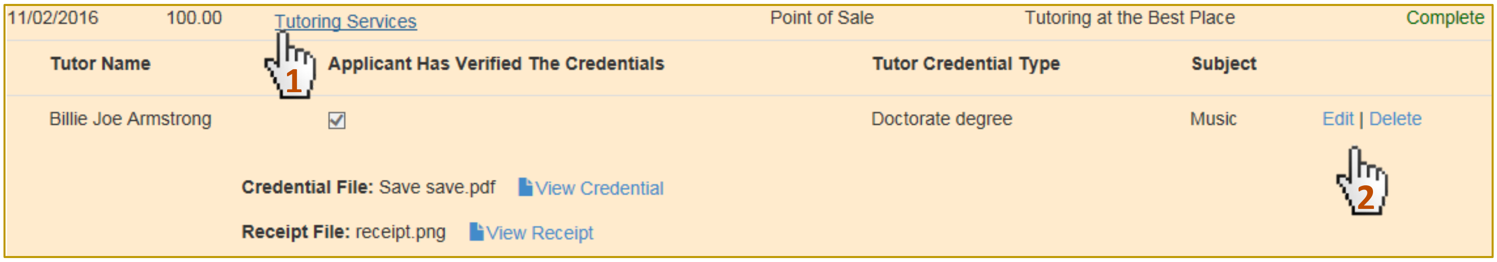


Payment Date	Payment Total	Expense Type	Payment Method Type	Vendor / Facility	Status
11/04/2016	150.00	Tutoring Services	Point of Sale	Tutors R Us	Incomplete
11/02/2016	100.00	Tutoring Services	Point of Sale	Tutoring at the Best Place	Complete

Figure I

7.1 Fixing and Deleting Entries

To correct or delete an entry, click the blue link under **Expense Type** column to expand the information, followed by **Edit** (to modify the entry) or **Delete** (to remove the entry):



11/02/2016 100.00 Tutoring Services Point of Sale Tutoring at the Best Place Complete

Tutor Name	Applicant Has Verified The Credentials	Tutor Credential Type	Subject	
Billie Joe Armstrong	☑	Doctorate degree	Music	Edit | Delete

Credential File: Save save.pdf View Credential

Receipt File: receipt.png View Receipt

Figure J

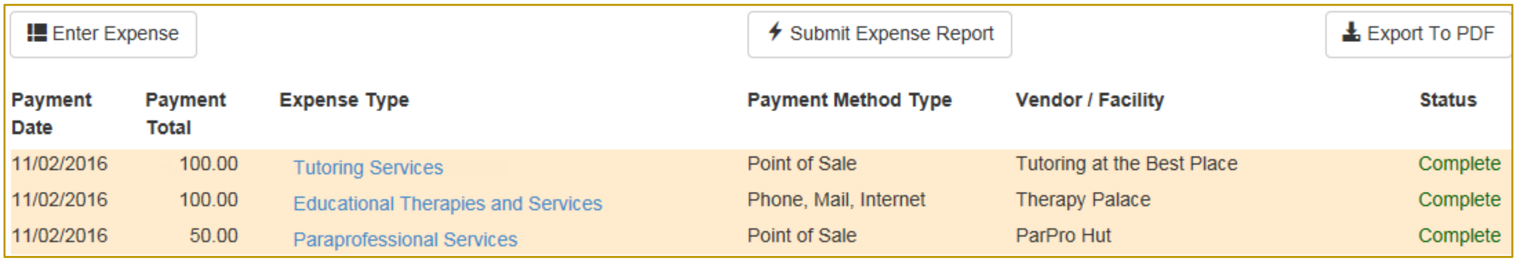
- **Tips:**
  - Confirm the **Receipt File** and **Credential File** are uploaded
  - Confirm the **Applicant Has Verified the Credentials** checkbox is selected

8.0 Submit the Report or Make a New Expense Entry

If you have additional expenses, click **Enter Expense** to begin a new expense entry.

When all your expense entries are complete, click **Submit Expense Report** to submit your expense report to ADE. Please be aware that **reports cannot be modified after submission**.

- If the **Submit Expense Report** button is not available, confirm the **Applicant Has Verified the Credentials** checkbox is selected
- You will receive a confirmation message and a confirmation email (if there is an email address on file) upon submission of an expense report



Payment Date	Payment Total	Expense Type	Payment Method Type	Vendor / Facility	Status
11/02/2016	100.00	Tutoring Services	Point of Sale	Tutoring at the Best Place	Complete
11/02/2016	100.00	Educational Therapies and Services	Phone, Mail, Internet	Therapy Palace	Complete
11/02/2016	50.00	Paraprofessional Services	Point of Sale	ParPro Hut	Complete

Figure K

Approvals, Denials, and Requests for Information will be sent via email.