

Family Portal User Instructions

Tennessee Education Savings Account (ESA) Platform

Overview

Welcome families, to the Tennessee Education Savings Account (ESA) Family User Portal! The Tennessee Department of Education is thrilled to provide an online platform designed to simplify the management of ESA funds.

Thank you for joining us on this journey towards enhancing your student's educational opportunities.

Family Portal Instructions

Account Sign Up

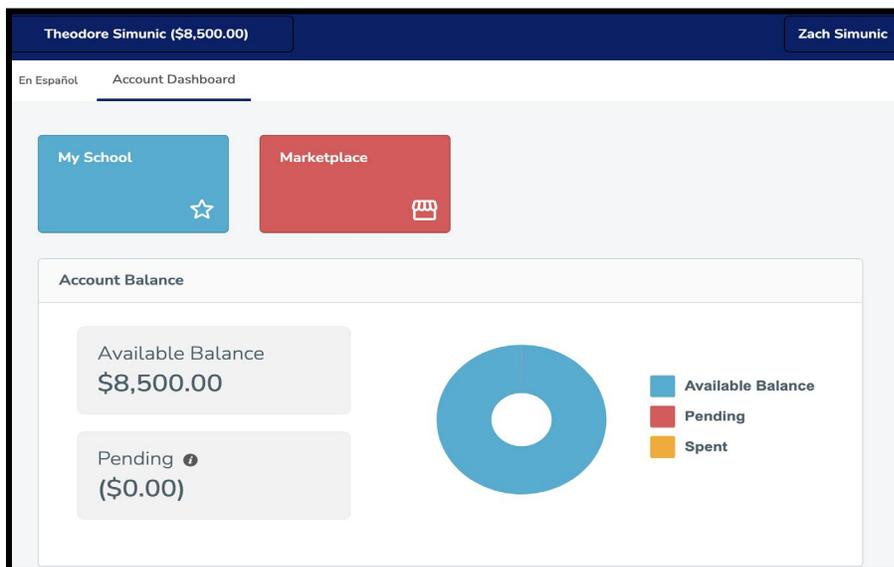
- Expect an email for each participating student with essential resources:
 - Custom link(s) to ESA Platform
 - Webinar video
 - Instructional materials
- Click on the custom link to go to the Account Sign-up page.
- Fill out the form completely:
 - Include a reliable email and phone number for program updates from the Tennessee Department of Education.

Fill out this information to access your student's account

Student Legal First Name Theodore	Student Legal Last Name Simunic
Parent or Legal Guardian First Name	Parent or Legal Guardian Last Name
Email Important information about your account will be sent to this email address	Phone Text messages will be sent to this phone number
Password Must be at least 8 characters	Confirm Password
Sign Up	

ESA Family Dashboard

- Welcome to the Family Dashboard! This is your one-stop hub for all current information on your student's ESA funds.
- Dashboard Locations:
 - Managing Multiple Students
 - Paying Tuition and Fees: A new tab appears once entered.
 - Editing Allocations to Tuition and Fees
 - Scheduling Educational Services/Buying Goods in Marketplace
 - Editing Family User Profile
- We will guide you through each section for a seamless experience.



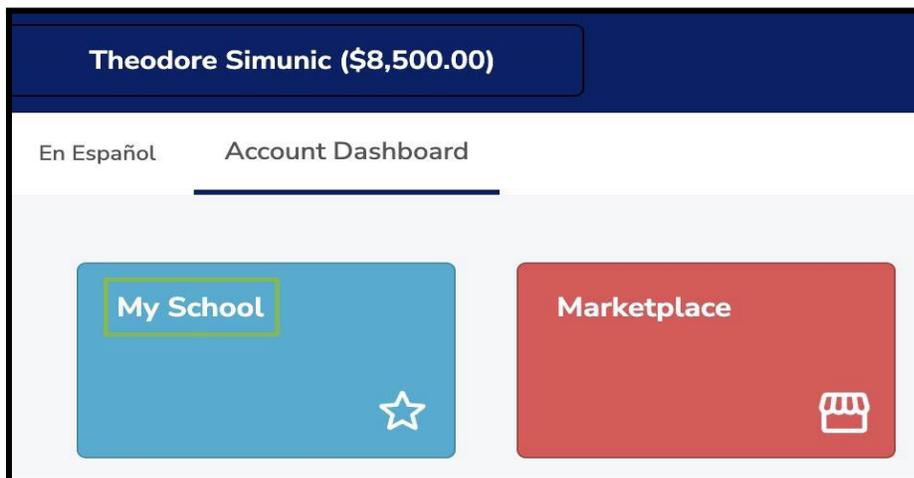
Managing More than One Student

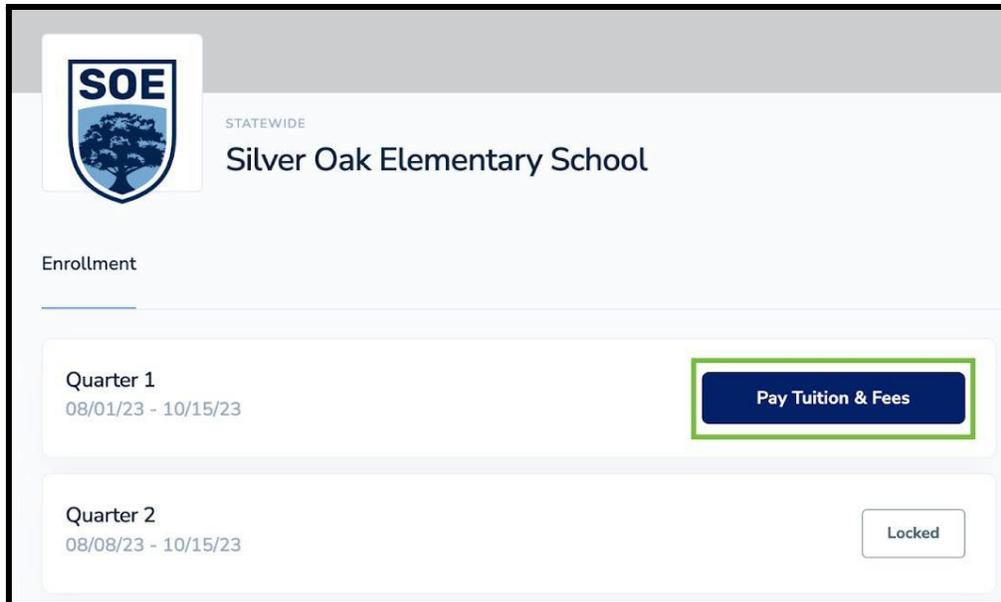
- Managing Multiple Students:
 - To switch between student records, click the current student's name on the top-left corner of the portal.
 - Navigate easily among available students with simple clicks.
- Consistency Across Profiles:
 - All family portal features remain the same for each participating student for a uniform experience.



“My School” Button

- Paying Tuition and Fees
 - Begin by clicking on the 'My School' button.
 - Each participating student is already connected to their enrolled school.
 - Then, click the 'Pay Tuition and Fees' button.
- Allocating to Core School Expenses
 - View the 4 Core School Expenses available for allocation.
 - Enter the amounts you wish to allocate in each field.
- Dashboard Updates
 - Head back to the Family Dashboard.
 - Note the changes in 'Available Balance' and 'Pending' statuses.
 - The simple pinwheel is also updated to reflect the sum of your allocations to each Core School Expense.

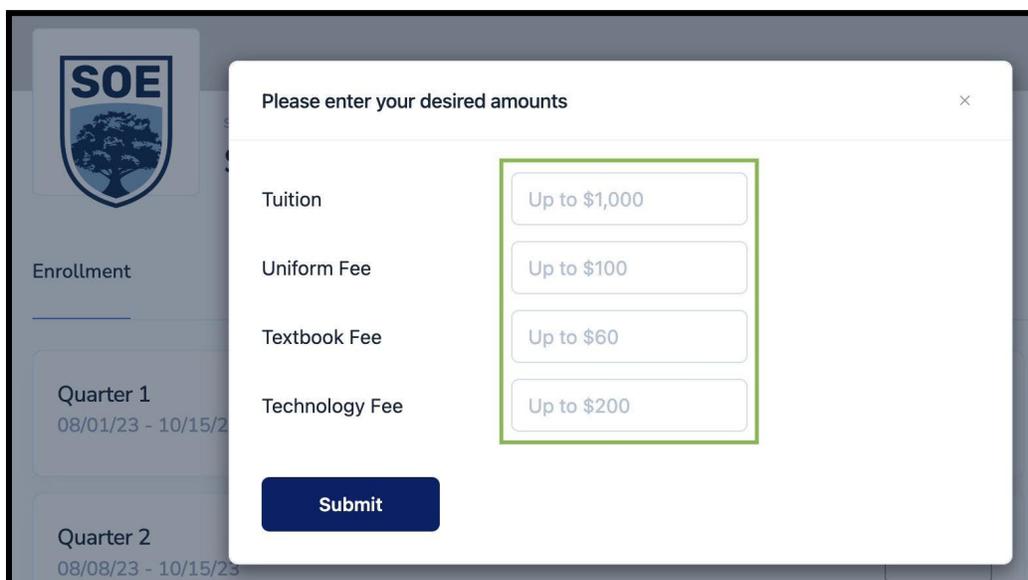




The screenshot shows the enrollment page for Silver Oak Elementary School. At the top left is the SOE logo. Below it, the text 'STATEWIDE Silver Oak Elementary School' is displayed. Under the 'Enrollment' heading, there are two sections: 'Quarter 1' (08/01/23 - 10/15/23) and 'Quarter 2' (08/08/23 - 10/15/23). A blue button labeled 'Pay Tuition & Fees' is highlighted with a green border in the Quarter 1 section, and a 'Locked' button is in the Quarter 2 section.

Editing Allocation to Tuition and Fees

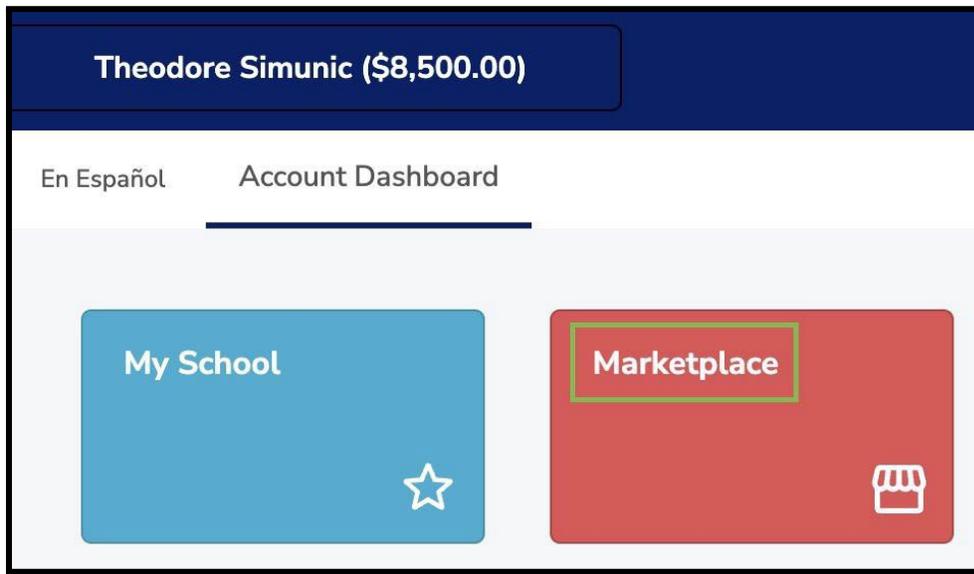
- Navigate to the “My School” section.
- Verify if the committed allocation is unapproved by the school.
- Click the cancel button for any unapproved allocations.
- Feel free to adjust allocations for Core Expenses like tuition, uniforms, textbooks, and technology.
- Go back to the Dashboard to see new and pending allocations.



The screenshot shows a dialog box titled 'Please enter your desired amounts' with a close button (X) in the top right corner. The dialog box contains four input fields, each with a green border, and a 'Submit' button at the bottom. The fields are: 'Tuition' (Up to \$1,000), 'Uniform Fee' (Up to \$100), 'Textbook Fee' (Up to \$60), and 'Technology Fee' (Up to \$200).

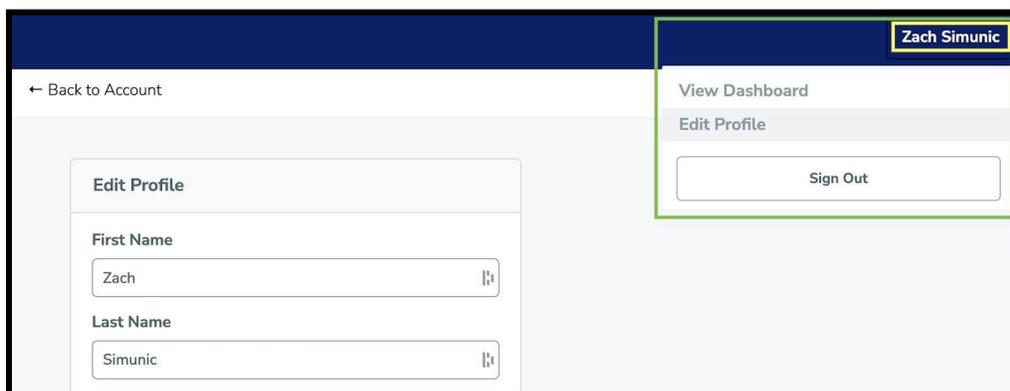
Marketplace

- Marketplace is coming soon for scheduling, tutoring, and other services.
- Enables purchase of educational goods using ESA account funds.
- Stay tuned for future updates on this feature.



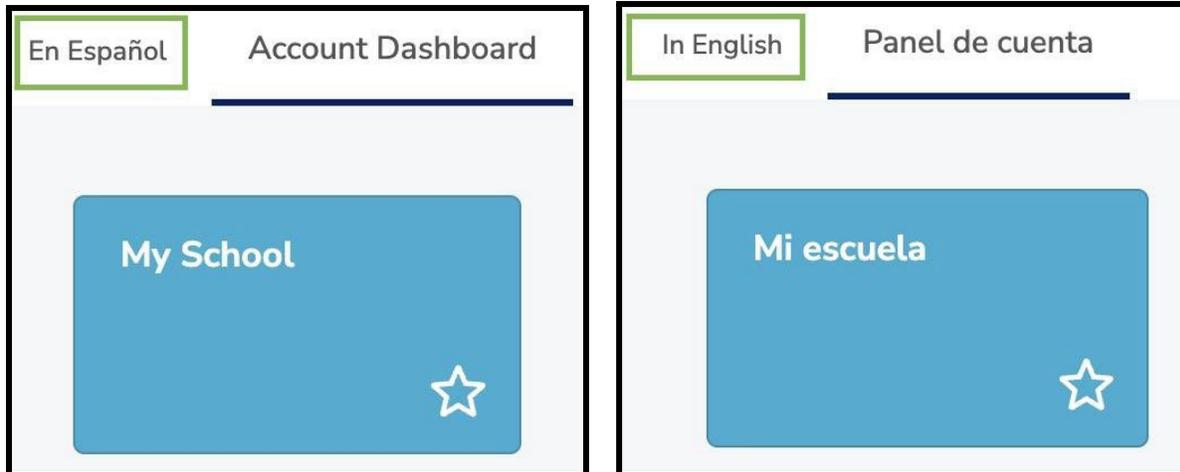
Editing Family User Profile

- Go to Family User's Name at top right of the screen. Click your name.
- Clicking on your name produces a drop-down menu. Click on the "Edit Profile" button.
- Edit any field as needed, including primary name, email, phone number, or communication preferences.
- Edit to create a new password as needed.



Switching Language to En Español and back to English

- Navigate to “En Español” button at the top left of the screen.
- If desired, switch the platform language to Spanish by clicking “En Español”.
- The option is available to revert to English by clicking “English”.



Start Using your TN ESA Digital Wallet!

- The Tennessee Department of Education is excited to welcome you to the new Tennessee ESA Platform.
- Please use these instructions to perform common user actions within the family portal.

Need Help?

If you run into any issues, the department is available to assist you. Email your questions to esa.questions@tn.gov or call (615) 741-9360.

With these steps, you will be well on your way to making the most of your student(s) ESA funds.