



Individualized Education Account (IEA) New Account Holder Orientation

Dr. Kari Miller

*Director of Choice Programs Applications and
Family Support | Division of Choice*

July 9, 2026



DISCLAIMER

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While the State supports your desire to maintain documentation of the meeting and what you learn, **please respect our decision to safeguard information** and do not attempt to use tools such as these. If you choose to use a tool such as this, the State will block that tool from the meeting.

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- About the IEA Team
- Navigating your family's first year in the IEA Program
- Frequently Asked Questions



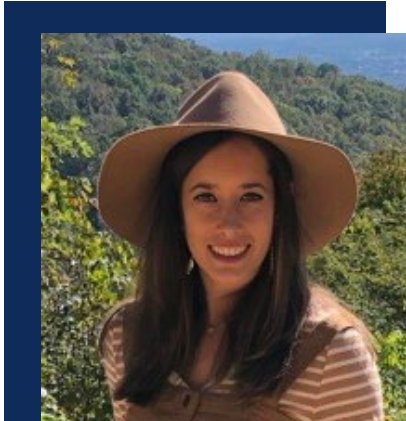
IEA Program Staff



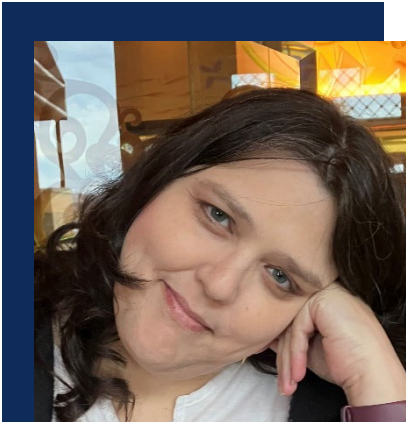
Dr. Kari Miller
*Director of Choice
Programs
Applications and
Family Support*



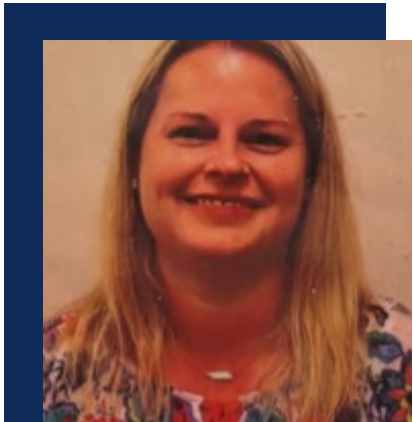
**Marisa
Hunter**
*Senior IEA
Fiscal
Coordinator
(Last names
A-L)*



**Stephanie
Wolaver**
*IEA Fiscal
Coordinator
(Last names
M-Z)*



**Shelley
Johnson**
*IEA Program
Specialist*



**Ashley
McCoy**
*IEA Operations
Assistant*

IEA Program Contact Information

IEA Website: <https://www.tn.gov/education/iea.html>

Support for IEA Families

• Assistance Finding a School • New Student Applications • Pre-Approval Requests • Student Assessments • Student Withdrawals	Shelley Johnson	Program Specialist	Shelley.R.Johnson@tn.gov	(629) 702-0410
• IEA Portal • IEA Resources • IEA Website	Ashley McCoy	Operations Assistant	Ashley.McCoy@tn.gov	(629) 259-1088
• Allowed/Disallowed Expenses • Debit Card Support • Expense Reporting: Last Names M-Z	Stephanie Wolaver	Fiscal Coordinator	Stephanie.Wolaver@tn.gov	(615) 638-5018
• ABLE TN/Coverdell Requests • Account Balances • Expense Reporting: Last Names A-L	Marisa Hunter	Sr Fiscal Coordinator	Marisa.Hunter@tn.gov	(615) 499-0497
• Appeals • Age of Majority (Age 18+) Information • Fraud Reporting	Dr. Kari Miller	Sr Manager of IEA Program	Kari.Miller@tn.gov	(629) 259-0443

Program Email: IEA.Questions@tn.gov



Navigating your First Year in the IEA Program



July

Task	Resource
1. Explore the IEA Program Website! • Link to the IEA Portal • Contact Information for the IEA Team • Forms • Handbook • Resources • Key Dates 2026-27 • Expense Reporting Guidance • Participating School List!	IEA Program Website: www.tn.gov/education/iea

July

Task	Resource
2. Research and choose your School for next year! School Types: 1. Participating non-public school 2. Umbrella home school program 3. Independently home schooled By July 15, submit your <i>School Enrollment Information Form!</i> <i>If you haven't finalized a school yet, please make a selection on the form, and then submit an update form if you change your selection later.</i>	• List of Participating Non-Public Schools is on our IEA Program Website: IEA Resources To use IEA funds to pay tuition at a school, they must be an IEA Participating School. • Home School Division website: Education Choices in Tennessee • School Enrollment Information Form: Forms
3. By July 15, notify your residential Local Education Agency (LEA) that your student will be participating in the IEA Program for 2026-27. Please "cc" IEA.Questions@tn.gov on your email to the LEA.	• List of LEA Liaisons on IEA website: IEA Resources > Local Educational Agency (LEA) Liaison List



July

Task	Resource
4. If you MOVE homes or CHANGE schools any time this year, the IEA Program must know right away! If you change your mind about participating in the IEA Program or return to public school during the 2026-27 school year, you must withdraw from the IEA Program.	Notifying the IEA Program of any changes: Forms



August

Task	Resource
1. Receive student's yearly allocation <u>AMOUNT</u> in August. Disbursements occur later, in four quarters. Quarter 1 – Disbursement projected September 15 Quarter 2 – Disbursement projected November 15 Quarter 3 – Disbursement projected February 15 Quarter 4 – Disbursement projected May 15	IEA Program Website: IEA Key Dates & Deadlines 2026-27



August

Task	Resource
2. It's Back to School time! 😊 By signing the IEA Account Holder Contract, account holders agree to enroll the participating student in a non-public or home school that meets the compulsory school attendance requirements in state law (T.C.A. § 49-6-3001(c)); and to provide an education for the participating student in at least the subjects of English language arts (ELA), mathematics, social studies, and science.	• The IEA Program is guided by state law, Tenn. Code Ann. § 49-10-14 et al. and State Board of Education Rule 0520-01-11. • Our IEA Program Handbook provides guidance based on the legislation. Handbooks

August

Task	Resource
3. Start thinking about any TUTORS or EDUCATIONAL THERAPIES that your child may need this year. Tutoring and Therapy requires Pre-Approval! (Other items that require Pre-Approval: Computer Hardware/Tech Devices, Educational Furniture) August is a good time to submit Pre-Approval Requests for Tutoring, Therapy, and other purchases that require pre-approval. Shelley Johnson is our Pre-Approval Specialist.	• To submit a Pre-Approval Request: Forms • Shelley Johnson, Pre-Approval Specialist: Shelley.R.Johnson@tn.gov

August

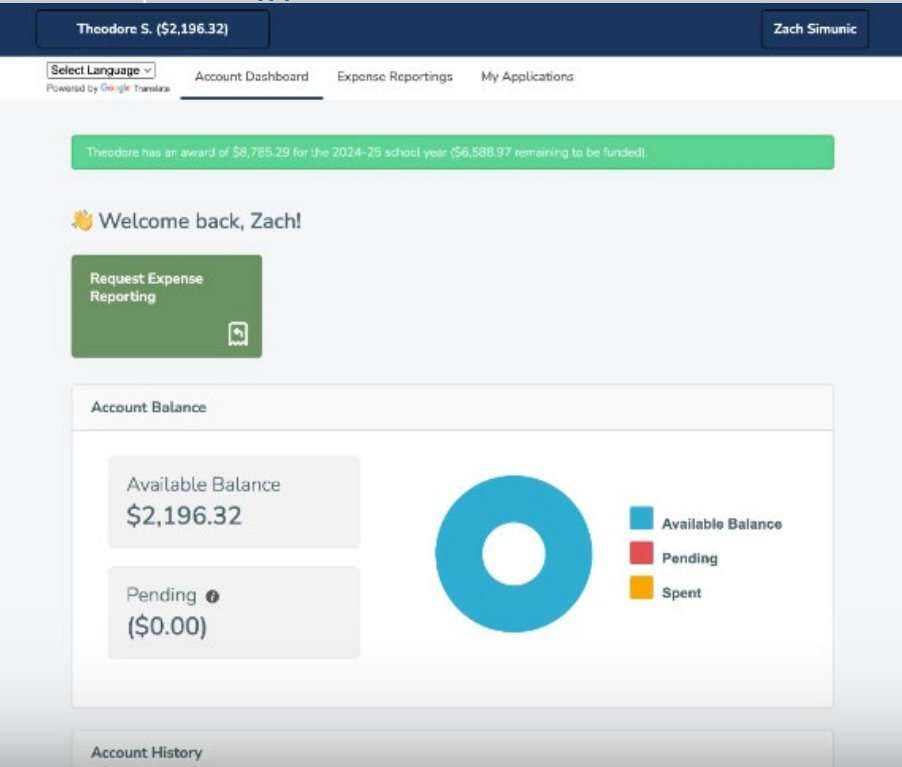


Task	Resource
4. Activate your student's Way2Go Debit Card* Your student's Way2Go Debit Card will arrive in the mail in August. It will not have any funds on it when it arrives. Funding happens in September. • Keep the card safe! • Mark the card so that you don't accidentally use it for a personal purchase! • "Misspent Funds" determinations • Some vendors/purchases might need to be whitelisted. Note: Cash withdrawals are never allowed under any circumstances!	• To activate the card, create PIN, or monitor available balance: • Mobile app (Apple Store or Google Play) • Online at www.GoProgram.com • Call 855-462-5889 * NOTE: If you have multiple IEA students, contact Shelley Johnson <i>BEFORE</i> activating your cards! Shelley.R.Johnson@tn.gov • Contact Conduent (the issuer of the debit card) for activation issues • For whitelisting requests, email IEA.Questions@tn.gov





September

Task	Resource
1. Your student's Quarter 1 Disbursement will be loaded onto their Way2Go <u>debit card</u> <i>around</i> September 15 (projected date). Disbursement amounts will be visible in the <u>IEA Portal</u> approximately 14 days after funds are loaded onto your student's debit card. The IEA Portal is not synced with the debit card. You can always check your student's to-date debit card balance on the Way2Go mobile app, Way2Go website, or by calling Way2Go.	IEA Portal: www.app.iea.tnedu.gov/users/signin 



September

Task	Resource
2. When funds are on your card, you may begin making purchases with your debit card! There are 14 categories of approved expense categories: 1. Tuition or fees at participating schools 2. Tutoring* 3. Educational Therapy* 4. Curriculum 5. Computer hardware/technological devices* 6. Test fees 7. Required textbooks at participating schools 8. Tuition for Online Learning Programs 9. Coverdell 520 Contributions* 10. Public school services 11. Tuition/fees at post-secondary institutions 12. Required textbooks at post-secondary institutions 13. Transportation 14. Financial management fees *Requires Pre-Approval	• Approved Expense Categories: IEA Account Holder Handbook

September

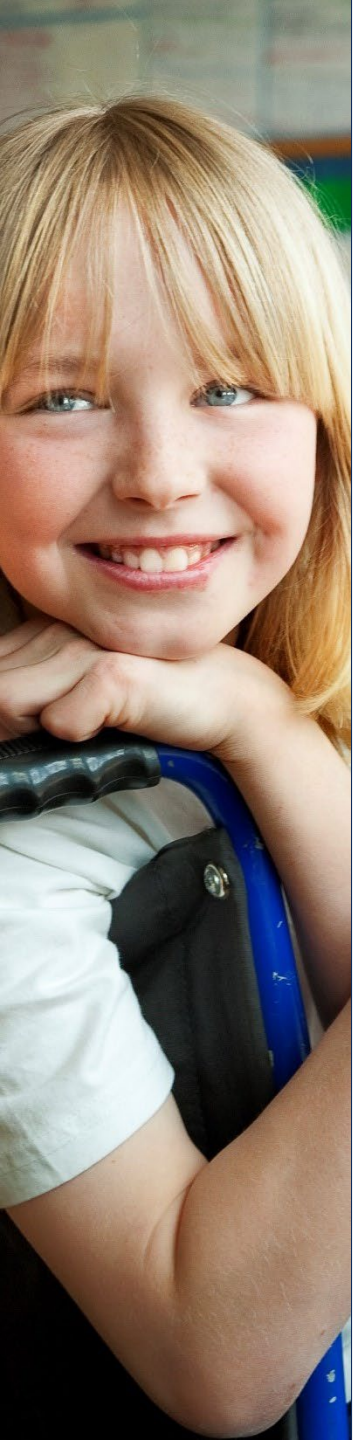
Task	Resource
3. Remember that some expenses are DISALLOWED EXPENSES ! A “misspent funds determination” will occur if these types of purchases are made and not corrected by the account holder.	- Disallowed Expenses and Misspent Funds: IEA Account Holder Handbook -See page 44 in the Handbook for a list of common disallowed expenses - Marisa Hunter (Last Names A-L) Marisa.Hunter@tn.gov (615) 499-0497 - Stephanie Wolaver (Last Names M-Z) Stephanie.Wolaver@tn.gov (615) 638-5018



September

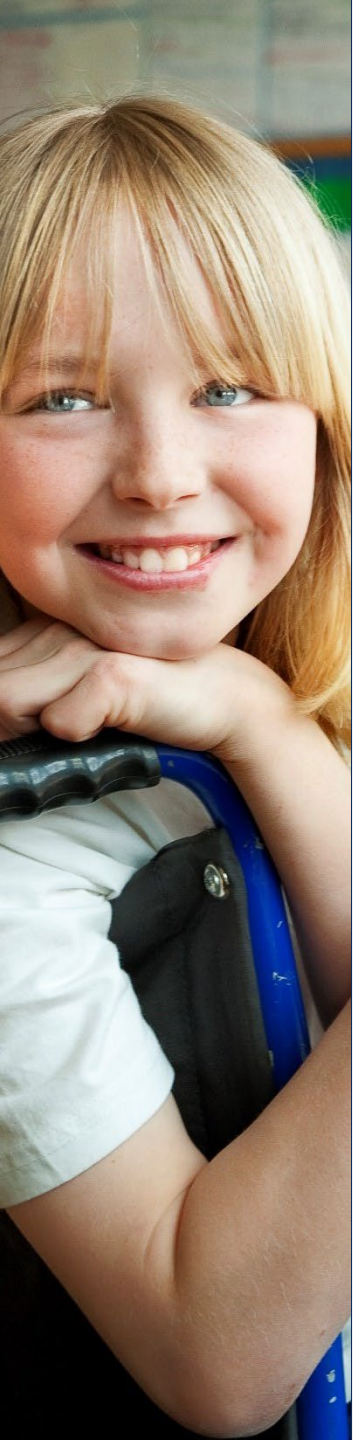
Task	Resource
4. WITHIN FIVE DAYS of making a purchase, you must report the expense and upload the receipt in the IEA Portal. The IEA Portal will only accept one file/upload per expense. If your purchase includes multiple receipts, it is recommended that you <u>combine those receipts into one document</u>.	- How to Report an Expense (also on our IEA Program Website): IEA Expense Reporting Guidance.pdf - Video tutorial on reporting expenses: Expense Reporting in Tennessee IEA Portal 📺 - How to combine receipts: Combining receipts for submission - Marisa Hunter (Last Names A-L) Marisa.Hunter@tn.gov (615) 499-0497 - Stephanie Wolaver (Last Names M-Z) Stephanie.Wolaver@tn.gov (615) 638-5018

The screenshot shows the 'Upload Documentation' form in the IEA Portal. At the top, it says 'Theodore S. (\$2,196.32)' and 'Zach Simunic'. Below that is a 'Back to Account' link and the date 'THURSDAY, SEPTEMBER 13'. The main heading is 'Upload Documentation'. The form is for 'Theodore Simunic'. It has a field for 'Enter Amount' with a note 'Total may change based on tax and shipping charged at time of purchase'. There is a 'Select a Category' dropdown menu with a note 'Please select the category this expense most closely falls under.' Below that is a 'Was this expense pre-approved?' dropdown menu with a note 'Select an option'. There is a section for 'Please upload documentation for this expense reporting' with a 'Choose File' button and a note 'No file chosen'. Below that is a 'Description' text area with a note 'Please describe in detail the purpose of this expense and how it relates to your child's educational needs. Please be as specific as possible and include any links to additional documentation.'



October

Task	Resource
1. Submit all Quarter 1 Expenses by October 1! If you did not spend any funds in the quarter, you do NOT need to submit any reporting of expenses.	How to Report an Expense (also on our IEA Program Website): IEA Expense Reporting Guidance.pdf
2. Remember that all account holders must spend at least fifty percent (50%) of the total amount of funding received annually on approved expenses <u>by the last expense submission deadline of each contract year</u>. Continue to track your spending. Plan ahead!	



October

Task	Resource
3. Understand Assessment 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 <i>exempt</i> from testing ONLY if they would have participated in the TN Alternate Assessment, as determined by their most recent IEP implemented prior to entering the program.	• Assessment Requirements are explained in our IEA Program Handbook Handbooks • Once your assessment is complete, submit the score report using the Assessment Verification Form on our IEA Program Website Forms • Some students may be eligible to take the TCAP test with their LEA. You must contact your LEA before December 15 to inquire if your student may take the TCAP test with the district! IEA Resources



November - June

Task	Resource
1. Continue following all IEA Program procedures and submit all expenses into the IEA Portal within five days of spending the funds. Quarter 1 – Disbursement projected September 15 Quarter 2 – Disbursement projected November 15 Quarter 3 – Disbursement projected February 15 Quarter 4 – Disbursement projected May 15	• How to Report an Expense (also on our IEA Program Website): IEA Expense Reporting Guidance.pdf • Remember to submit Forms for • Address changes • Student/School information changes • Student withdrawals • Assessment verifications Forms • All Key Dates are listed on our IEA Program Website
2. The projected window for 2027-28 renewal applications is February 16 – April 16 (projected dates).	• IEA Program Portal www.app.iea.tnedu.gov/users/sign_in

A young man with dark hair, wearing a yellow and black plaid shirt over a white t-shirt, is looking down at a silver laptop he is holding. He has a blue backpack strap visible over his shoulder. The background is a blurred green foliage.

Key Takeaways

- **Familiarize** yourself with the [IEA website](#) and the [IEA Program Handbook](#).
- **Enroll** your student(s) in a:
 - participating non-public school,
 - home school umbrella program, **or**
 - independent home school.
- **Complete** the School Enrollment Form and LEA Notification by July 15.
- **Identify** key dates and deadlines.
- **Watch** for the Way2Go debit card.
- **Receive** pre-approval from the department before making certain purchases.
- **Save** all receipts from purchases made with IEA funds.
- **Submit** the expense in the portal **within five days** of making the purchase.
- **Look** for our emails throughout the year!

IEA Program Frequently Asked Questions (FAQs) & Answers

IEA Program FAQs

Q: Can a student attend a public school full-time while participating in the IEA Program?

A: No. IEA Students must be enrolled in a non-public school, an umbrella home school program, or be independently home schooled.

Q: If I've submitted the School Enrollment Form, can I change my mind and keep my child in public school? If so, how long do I have to make this final decision?

A: You can withdraw your student from the IEA Program **at any time** using the *IEA Student Withdrawal Form* and then reenroll in public school. We must have your Withdrawal Form!



IEA Program FAQs

Q: If I move to another state, can I transfer my student’s IEA?

A: No. Each state has rules and regulations regarding participation in scholarship programs. The IEA Program or other similar programs cannot be transferred between states.

Q: What happens to the funds if I choose to re-enroll my child in public school, withdraw from the IEA Program, or move out of state?

A: The funds will be returned to the state.



IEA Program FAQs

Q: Do I have to notify the program when I change schools or school types?

A: Yes, you are required to notify the IEA Program of a student’s change in schools or school types by submitting the *Account Holder & Student Information Update Form*. This is also true if you select a school now, and then decide on a different school/school type before the school year begins.

Q: Do I have to notify the program when I move or change addresses?

A: Yes, you are required to notify the IEA Program of a change in address, email address, and/or phone number by submitting the *Account Holder & Student Information Update Form*. An address change may result in a delay in payment, depending on the date it is received. Address and legal name changes require a new W-9 form to be submitted as well. Please note, a change in address may delay the next payment disbursement.



IEA Program FAQs

Q: Which schools accept IEA funds?

A: A list of current IEA Participating non-public schools is available on the *Resources* page of the IEA website. To accept payments for tuition, textbooks, and fees, a school must be on this list.

Q: Do I have to get pre-approval for every expense before spending funds?

A: No, but there are specific expense categories that do require pre-approval before funds can be used. Please refer to the *IEA Program Handbook* for more information about pre-approvals and which expenses require pre-approval. Always reach out to your fiscal coordinator if you have questions about an expense.



IEA Program FAQs

Q: Can I be reimbursed for purchases I make before the Quarter 1 disbursement, which is projected for September 15?

A: No, we are not able pay account holders, for any reason. All purchases must be made with the IEA debit card. You can not be reimbursed for any purchases you make with personal funds.

Q: Do receipts have to show “paid”?

A: The receipt must indicate that the expense was paid. Receipts should also include the item or service, date, and amount paid. Do not submit receipts for purchases where personal funds were used. Only submit expenses when IEA funds were spent.



IEA Program FAQs

Q: How long can my child be in the program?

A: No additional IEA disbursements will be made to a student’s IEA after the student graduates from high school or reaches twenty-two (22) years-of-age.

Additional questions may be directed to IEA.Questions@tn.gov, or use the [Contact List](#) on the IEA Program Website to direct your question to the correct individual!





Thank You!

IEA.Questions@tn.gov

Dr. Kari Miller
Sr Manager of IEA Program

Ashley McCoy
IEA Operations Assistant

Marisa Hunter
IEA Sr Fiscal Coordinator (A-L)

Shelley Johnson
IEA Program Specialist

Stephanie Wolaver
IEA Fiscal Coordinator (M-Z)

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