

UTAH FITS ALL

UFASCHOLARSHIP.COM

(EDUCATION SAVINGS ACCOUNT)

FAMILY HANDBOOK

2024-2025 SCHOOL YEAR

THEIR FUTURE STARTS NOW

FUNDING CUSTOMIZED EDUCATION FOR UTAH'S K-12 STUDENTS

ALL INFORMATION IS CURRENT AS OF PUBLICATION ON APRIL 5, 2024

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DEAR UTAH FAMILIES,

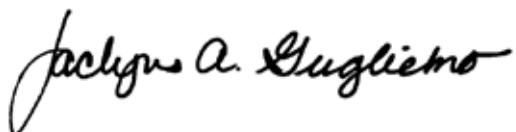
We appreciate your interest in the Utah Fits All Scholarship Program. ACE Scholarships is excited to be part of this initiative, aligning with states nationwide to provide educational flexibility to K-12 students and advocating for expanded school choice. Utah's program offers universal eligibility while prioritizing those students who demonstrate the greatest financial need. An expansive list of approved expenses allows families flexible use of scholarship funds to purchase goods and services that fit their student's unique educational journey.

Quality education can impact a family for generations. We strongly believe every child should have equal access to a learning environment focused on their individualized outcomes, and this program moves us closer to our mission and Utah's goal that every student finds their best educational fit.

At ACE, we know that every child learns differently, and parents make the best educational choices for their child. We hope you find the UFA Scholarship process efficient and effective for your family. The UFA Customer Support Team is here to provide information, guidance, and support. ACE Scholarships is dedicated to education quality through the Utah Fits All Scholarship Program.

We look forward to helping you make your educational dreams a reality.

Sincerely,



Vice President of ESA Programs
ACE Scholarships



CHAPTER 1: INTRODUCTION TO UTAH FITS ALL

THE PURPOSE OF THE FAMILY HANDBOOK

Welcome to the Utah Fits All Family Handbook. The purpose of this handbook is to give you important information about the Utah Fits All Scholarship Program. The objective of this handbook is to help you learn more about:

- 1. What the Utah Fits All (UFA) Scholarship is and how to determine if you are eligible**
- 2. How to apply for a UFA scholarship**
- 3. How the program works, responsibilities of the parent and what educational expenses are approved**
- 4. How to find qualified providers in the marketplace and make payments**
- 5. Resources and getting your questions answered**

THE UTAH FITS ALL SCHOLARSHIP PROGRAM

The Utah Fits All Scholarship Program was established through House Bill 215 during the 2023 General Legislative Session sponsored by Representative Candice Pierucci and Senator Kirk Cullimore and signed into law by Governor Spencer Cox on January 28, 2023.

Beginning in the 2024-25 school year, the Utah Fits All Scholarship Program will provide up to \$8,000 to eligible K-12 students. The scholarship funds will be deposited in an education savings account (ESA) and accessed using a digital wallet. Funds can be used to pay for approved education services and materials, including private school tuition and fees, tutoring services, after school programs and summer camps, materials and curriculum costs, transportation, and more.

ACE Scholarships was chosen by the State of Utah to administer the Utah Fits All Scholarship Program. Be sure to visit the [Program website](#) to find more information about the UFA program, sign up for our monthly newsletter, view the list of qualified providers, learn about the different ways you can use your scholarship funds, or to stay updated on the law and any program changes.

DEFINITIONS

The Utah Fits All Scholarship Program is outlined in House Bill 215 and uses various definitions to help understand and define the program. To review the full definition list in its entirety, visit [Utah Code 53F-6-401](#). Some important UFA terms are defined below:

- 1. Utah Fits All Scholarship Program:** or "UFA," means the scholarship program established in Section 53F-6-402.
- 2. Eligible Student:** a student who is a resident of Utah, including a child of a military service member, as defined in Section 53B-8-102; eligible to participate in K-12 (at least 5 years old and no more than 18 years old on or before September 1 of the year in which you are applying), does not receive the Carson Smith Opportunity Scholarship; is not enrolled in an LEA or in the Statewide Online Education Program (SOEP) upon receiving the scholarship; whose eligibility is not suspended or disqualified, and who completes, to maintain eligibility, the assessment or portfolio requirement.
- 3. Scholarship Student:** an eligible student for whom the program manager establishes and maintains a scholarship account.
- 4. Program Manager:** ACE Scholarships is the organization recognized by the state board as the UFA program manager.
- 5. Qualifying Provider:** an eligible school or service provider that the program manager approves or a participating LEA. Qualifying provider does not include: a parent of a home-based scholarship student or a home school student solely in relation to the parent's child; or any other individual that does not meet the requirements.
- 6. Eligible School:** a private school or an LEA (public charter or district school, not the SOEP).
- 7. Eligible Service Provider:** A private program or service that offers one or more scholarship expenses to an eligible student
- 8. Scholarship Account:** the account to which the program manager allocates funds for the payment of approved scholarship expenses.
- 9. Scholarship Expense:** an expense that a parent or scholarship student incurs in the education of the scholarship student for a service or goods that a qualifying provider provides. Scholarship expenses are further defined in UC 53F-6-401 and UC 53-6-402 and in Chapter 3 and Appendix A of this handbook.
- 10. Scholarship Funds:** funds that the Legislature appropriates for the program.
- 11. SOEP:** Statewide Online Education Program. UFA scholarship students may not enroll or have a SEAT in SOEP, doing so will disqualify them from scholarship eligibility. However, online providers in SOEP are eligible to become UFA-qualifying providers, where UFA students may use their scholarship funds to pay for courses and services.

STUDENT ELIGIBILITY

To be eligible for a UFA scholarship for the 2024-2025 school year, your student:

<p><input checked="" type="checkbox"/> Must be a resident of Utah.</p>	<p>Students of active-duty military personnel are eligible to participate. The family may be stationed in Utah but live elsewhere, or if Utah is their state of legal residence, and they are stationed elsewhere.</p>
<p><input checked="" type="checkbox"/> Must be a K-12 student for the year they are applying for the program.</p>	<p>Kindergarten students must be 5 years of age by September 2nd of the school year to qualify for a UFA scholarship.</p>
<p><input type="checkbox"/> Cannot be enrolled in a public school (district or charter) or the SOEP for the school year in which the scholarship is used.</p>	<p>Students may apply to the UFA scholarship while enrolled in public district, charter schools or the SOEP, but must disenroll upon receiving the UFA scholarship. Waitlist families can remain enrolled in a public school but will need to disenroll if they accept a UFA scholarship award. See Utah Code 53F-6-401.</p>
<p><input type="checkbox"/> Cannot receive the Carson Smith Opportunity Scholarship in the same year as the Utah Fits All Scholarship.</p>	<p>Students may apply for both scholarships but can only use one scholarship during the school year.</p>

Note: Foster parents who are in the process of adoption will indicate their status during the application process so their child can qualify for a UFA Scholarship.

ENROLLMENT PREFERENCE CATEGORIES

For the 2024-2025 school year, there are 10,000 scholarships available and the law gives priority to specific groups of students ([Utah Code 53F-6-402](#)). This first year there are three priority groups:

1. Students in families with a household income at or below 200% of the Federal Poverty Level will be awarded scholarships first.
2. Students in families with a household income at or below 200-555% of the Federal Poverty Level.
3. If scholarships are still available, it opens to all Utah K-12 students, regardless of household income.

		2024 Federal Poverty Level for the 48 Contiguous States (Annual Income)	
		200%	555%
Household/Family Size	1	\$30,120	\$83,583
	2	\$40,880	\$113,442
	3	\$51,640	\$143,301
	4	\$62,400	\$173,160
	5	\$73,160	\$203,019
	6	\$83,920	\$232,878
	7	\$94,680	\$262,737
	8	\$105,440	\$292,596

*Add \$10,760 for the 200% FPL for each person in household over 8 persons
 **Add \$29,859 for the 555% FPL for each person in household over 8 persons

SOURCE: [medicaidplanningassistance.org/federal-poverty-guidelines/](https://www.medicaidplanningassistance.org/federal-poverty-guidelines/)

LOTTERY AND WAITLIST STUDENTS

Applications will first be placed based on the priority categories described above. If there are more applicants in any given category than there are scholarships funds to award, then a lottery will be used for selecting eligible students to award from that category.

Lottery numbers are assigned by a random number generator. ACE Scholarships encourages all parents of waitlisted students to save all receipts from their educational expenses for reimbursement if they ultimately are removed from the waitlist and receive a UFA Scholarship. Waitlisted students can view their application status and waitlist position number. Families on the waitlist should make alternative plans for their student's education in case they do not receive a scholarship.

Each year additional scholarships will be available as the program grows. If you do not receive a scholarship for the current year, you can apply the following year. Waitlisted students who wish to apply in future years, will need to reaffirm their student's application information, including eligibility and income, and are assigned a new lottery number. Families with more than one eligible student will receive just one lottery number per household and should fill out one application adding each of their eligible K-12 students (see next chapter for more details about the application).

Starting in the 2025-2026 school year, and moving forward, students will be selected for scholarships based on the following preferences according to the law ([53F-6-402-6](#)):

1. An eligible student who used a scholarship account in the previous school year.
2. An eligible student who did not use a scholarship account in the previous school year, with a family income at or below 200% of the federal poverty level.
3. An eligible student who is a sibling of an eligible student,
 - a. who uses a scholarship account at the time the sibling applies for a scholarship account
 - b. or used a scholarship account in the school year immediately preceding the school year for which the sibling is applying for a scholarship account.
4. An eligible student who did not use a scholarship account in the previous school year with a family income between 200% and 555% of the federal poverty level.
5. All other eligible students.

In 2025-26 two more tiers will be added:

1. Eligible students who had a UFA scholarship the previous year.
 - Eligible students who did not have a scholarship the previous year and whose family income is at or less than the 200% Federal Poverty Level.
2. Eligible siblings of previous year UFA scholarship students.
 - Eligible students whose family income is at the 200- 555% Federal Poverty Level.
 - All eligible students.

REQUIRED ANNUAL PORTFOLIO OR OPTIONAL ASSESSMENT

To maintain eligibility in the Utah Fits All program, a scholarship student or the scholarship student's parents must complete and deliver to ACE Scholarships a portfolio describing the scholarship student's educational opportunities and achievements under the program for the given year ([53F-6-402-3-d](#)). This will be submitted once a year using the [Unrurl platform](#). Alternatively, a scholarship student can complete an assessment which will satisfy the portfolio eligibility qualification ([53F-6-410-d](#)). Assessments are optional but may be preferred if the scholarship student attends a school that administers an assessment or if the parents or student prefers to do an assessment in place of the portfolio.

RENEWAL OF SCHOLARSHIP

Each year, participating scholarship students must communicate their intent to continue their participation in the Utah Fits All Scholarship Program during the open enrollment period on the [Utah Fits All Scholarship Program website](#). **The parent must verify the scholarship student's and parent's information is current and that the student still meets the eligibility requirements.**

RIGHT TO AUTONOMY

As stated in the law, there is no additional authority to any state agency or LEA to regulate or control a private school, qualifying provider, or home school. Students receiving education from a home school have the freedom of choice in curriculum, resources, developmental planning, or any other aspect of the home school student's education. Note: Homeschooled students who wish to participate in the Utah Fits All program need to be excused from enrollment in an LEA in accordance with Section [53G-6-204](#).

VOLUNTARY WITHDRAWAL

An eligible student who is offered a UFA scholarship can decline the offer when they are notified of their award. The parent only needs to notify ACE Scholarships that they will not be taking the scholarship and the scholarship will be offered to the next student on the lottery waitlist. A scholarship student may voluntarily withdraw from the Utah Fits All Scholarship Program at any time. To withdraw a student(s) from the Utah Fits All Scholarship Program, the following 3 steps must be followed:

- Complete the Utah Fits All Scholarship Program's Student Withdrawal Form within five business days of the student's school withdrawal. Your school will also fill out a withdrawal form, but the parent or guardian should also complete the Student Withdrawal Form to ensure that accurate information is received and to provide where the student will enroll next.
- If applicable, notify the student's current school that you will not be using the Utah Fits All scholarship for tuition and other fees. If you will still be attending the school, follow their instructions for how you will make your payments to the school, or if you are withdrawing, know their procedures. Schools will receive payments for the days the student attended before withdrawing from the Utah Fits All program.
- If applicable, notify any service providers you are using that you will not be paying for services or goods using the Utah Fits All scholarship. If needed, make other arrangements for payment if you elect to continue with their services.

CHAPTER 2: APPLYING FOR A UTAH FITS ALL SCHOLARSHIP

HOW TO APPLY FOR A UTAH FITS ALL SCHOLARSHIP

If your student meets the eligibility criteria as outlined in Chapter 1 you may apply for a UFA Scholarship on their behalf on our [Utah Fits All Program website](#). To apply for a scholarship, the parent of the eligible student must submit an application online. Families can apply for all eligible K-12 children in their household on just one application. The application for the 2024-25 school year opens on February 28 at 8 a.m. and will close on April 22 at 11:59 p.m. It is available in both English and Spanish.

Note: The Utah Fits All Program will announce its open enrollment window each year. Timelines for the Utah Fits All Scholarship Program will be posted on the [Utah Fits All Scholarship website](#). To stay up to date on the enrollment process and other information about the scholarship you can sign up for the UFA monthly newsletter or you can visit the website for current information.



INFORMATION NEEDED FOR THE UFA SCHOLARSHIP APPLICATION

The application process is simple for families. You will need the following information ready to expedite the application process:



1. You may need to provide a photo ID document, such as a driver's license.



2. You will need a birth certificate to verify the age of each student applicant. You will also need to specify their grade level.



3. You will need information about your household income if you would like to be placed in an enrollment preference category. You can have your income instantly verified with an employer or you may choose to upload your income documents, such as a Form 1040, Form W2, or Form 1099.

Providing complete and accurate information regarding your household income will allow us to place your student in the appropriate enrollment preference category. Providing inaccurate or incomplete documentation may result in your student's eligibility being suspended or disqualified.

All information is securely encrypted and isn't shared with any other government agencies or entities.

Note: If you need to exit the application at any time, your progress will be saved and you can return where you left off when you reopen it. However, once you submit the application, you will not be able to re-enter.

WHAT THE APPLICATION PROCESS LOOKS LIKE:

Parent Information

1. Create your account with your email address and a password.
2. Enter your phone number and date of birth.
3. At this point, you will receive a verification code. The code expires in 5 minutes; enter it promptly on your application. If you did not receive the code, click on the option to "resend code".
4. You will receive a confirmation of your information, including your name, date of birth, phone number, address, and SSN. You will have a choice to either update your information or confirm and continue. After continuing, you will receive a notice that your identity has successfully been verified.

Student Information

1. You will enter the student's full name, their grade level for the 2024-25 school year and your relationship to the student.
2. Next, you will have the option to enter your student's Social Security Number (SSN). This unique number will help prevent duplicate applications and helps verify your student's identification.
3. Next, you will be asked:
 - a. Will your student apply for the Carson Smith Opportunity Scholarship? Remember, your student can apply for the Carson Smith and the UFA scholarships, but only one can be used during the school year.
 - b. Will your student participate in an academic or other program at a public or charter school for the scholarship year 2024-2025? All students are encouraged to apply to the UFA scholarship even while enrolled in public district, charter schools or the SOEP, but the student must disenroll upon receiving the UFA scholarship. Waitlist families can remain enrolled in a public school but will need to disenroll if they accept a UFA scholarship award.
4. Now it is time to take a picture of your student's birth certificate. Instructions will be given on how to do this. Once the document is submitted, you will receive a notice that it is being processed.
5. If you do not have a birth certificate, you can enter the student's date of birth and continue with the application.

Additional Students

You will now be asked if you would like to add another student to your application. If so, enter their information as you did previously for your first child's submission.

Note: If you do not have a birth certificate the application may be submitted, but will be considered incomplete. Once the application is submitted, you will receive an email with a link to an affidavit form to complete explaining why you do not have the birth certificate, as well as uploading one of the following alternative documents:

- **a religious, hospital, or physician certificate showing the student's date of birth**
- **an entry in a family religious text;**
- **an adoption record;**
- **previously verified school records;**
- **previously verified immunization records;**
- **documentation from a social service provider;**
- **other legal documentation, including from a consulate, that reflects the student's biological age**

If the birth certificate or alternative documentation is not submitted by April 22, the application will be considered incomplete and the student will be ineligible for a scholarship award.

Skipping Income Verification

If you have applied for a federal benefit program anytime since January 2023, you do not need to verify your income and will be placed in the first preference category, automatically skipping the income verification step.


Don't verify my income

If you do NOT want to verify your income, you can skip this step by selecting **Don't verify my income**. This means you will not be asked to show any proof of income and it will take you to the final steps of the application where you will verify all your application information and agree to the attestations. Again, even if your household meets the income qualifications to receive priority, choosing **Don't verify my income** at this point will place your student(s) in the last eligibility category.

Income Verification

To determine your application priority, you will need to enter your household income.

1. The first option allows you to skip the income verification or to proceed with the income verification. If you choose to skip the income verification you will place your student's application in the last preference category. If you proceed to verify your income, you will go to the next screen which will show your application information. If you see any errors, you can click on the pencil icon to the right of the item and correct the error.
2. Now it is time to enter the number of family members living in your household. When counting your household size you can include yourself, your partner/spouse, or other adults you live with, and all persons you claim as a dependent.
3. You will now be asked some questions about your income:
 - a. Was your 2023 income \$_____ or more?
 - b. Which describes your household, a single-income or dual income household, or other.
 - c. You may now connect to your employer's payroll provider, or you may choose to upload income documentation for the year previous to the UFA participation year.


Verify instantly
 Less than 2 minutes

Verify with employer login





- d. If you choose to enter your information manually. You will be asked different questions:
 - i. Did you file your taxes jointly, individually or did not file
 - ii. You will now add a photo of your 1040 tax form, all household W-2 forms, or all household 1099 forms. You can also submit these forms as pdf files. You will be prompted to remember to upload all forms that demonstrate a complete and accurate representation of your total household income. When the documentation is verified you will receive an email notification.
 - iii. Did your household receive any non-taxable income for 2023 (Social Security or Disability Benefits)? You will be asked to upload the award letter. If you do not have it follow the instructions below to help you find it with a link to the Social Security website.

Note: If you do not have a copy of your document(s) you will be provided a link to the [Social Security Administration](#) to request one. You may submit the application, but without a verified income, your application will be placed in the last priority group. You can leave the application at any time and return at a later time to submit the needed information or documentation. All applications must be submitted by April 22.

Once your income is verified you will be given the option to enter the income information of your spouse/partner. When your income verification has been completed you will receive an email notification.

Agreement to UFA Scholarship Terms

At the end of the application process you will need to agree to the following five statements:

A qualifying provider may not provide the same level of disability services that are provided in a public school.

This means: The public school must adhere to the Individuals with Disabilities Act (IDEA) which guarantees free and appropriate education and specific rights to children with disabilities and their families. Other types of qualifying providers, like private schools, aren't legally obligated to follow IDEA but may use an Individualized Service Plan (ISP) instead of an Individualized Education Plan. ISPs may offer fewer services and accommodations, so before enrolling, the parent or guardian should make sure that any prospective provider is able to meet the special education needs of their student.

I will assume full financial responsibility for the education of my scholarship recipient if I agree to this scholarship account.

This means the Utah Fits All Scholarship Program provides qualified students with up to \$8,000 in scholarship funds. If a student's educational expenses exceed the amount, the parent is responsible for covering the remaining costs.. Please make sure to discuss any payment arrangements with your providers. ACE Scholarships is unable to provide any additional scholarship funds beyond the yearly scholarship amount.

Agreeing to establish this scholarship account has the same effect as a parental refusal to consent to services as described in 34 C. F. R. Sec. 300.300, issued under the Disabilities Educational Act, 20 U. S. C. Sec. 1400 et seq.

When a parent enrolls their child in the Utah Fits All Scholarship program, they are simultaneously declining special education services from the public school. This means that while the student is participating in the program, the public school won't provide any services, hold IEP meetings, or create a new IEP. However, if the parent requests it, the public school district will reassess the student's eligibility for special education services. Please refer to your public school district for instructions on requesting a reassessment.

My child may return to a public school at any time.

To stay eligible for the Utah Fits All Scholarship, a student can't be enrolled in a public or charter school, but can take courses from a public or charter school that is a UFA provider.

The qualifying provider I select for my student's enrollment or engagement is capable of providing education services for my student.

This means that the parent will be responsible for selecting the student's providers, understanding all services offered, who will be providing services, and ultimately making sure that they meet the educational needs of their student.

If you follow the above steps correctly, your application will be submitted and your documents processed. You will receive an email once your documents have been processed.

You can return to your application at any time to make changes or to add your additional children as eligible students before submitting the application. However, once you submit the application you will not be able to re-enter.

Note: Parents will need to update contact information if it changes during the school year to ensure regular and timely communications through their Utah Fits All account and with ACE Scholarships. This includes, but is not limited to, any changes made to the following:

- **email address**
- **physical address**
- **phone number**
- **student's grade level**

NOTIFICATION OF SCHOLARSHIP AWARD

For the 2024-25 school year, the application will be available on February 28 at 8:00 a.m. on the [Utah Fits All Scholarship Program website](#) and will close on April 22 at 11:59 p.m.. Families will be notified by May 3 if they received a scholarship and, if not, where their exact placement is on the waitlist. If families do not receive a scholarship, they should have alternate plans for their student's education.



CHAPTER 3: UTAH FITS ALL SCHOLARSHIP FUNDS

SCHOLARSHIP STUDENTS

Once eligible students are approved for a Utah Fits All Scholarship and receive their award, they become scholarship students, and their parents can then use the student's deposited funds for approved educational expenses by shopping a curated marketplace, paying a qualifying provider using DirectPay, or submitting a receipt for reimbursement. Scholarship funds can only be used for expenses that are outlined in the law and the program manager determines that the scholarship student or their parent incurred in the education of the scholarship student.

Note: Utah Fits All funds used for educational purposes do not constitute state taxable income for families. ACE Scholarships cannot provide tax advice to families. Please consult a tax professional with any questions.

ACCOUNT HOLDER FINANCIAL RESPONSIBILITY

The parent is the account holder and has the responsibility to manage the scholarship funds in compliance with the Utah Fits All Scholarship Program requirements. These responsibilities include:

- use of funds are solely for the education and benefit of the scholarship student for whom the Utah Fits All Scholarship is established. Funds cannot be shared between students.
- paying for educational expenses using the digital wallet to qualified providers.
- submitting receipts for educational purchases that are not made in the marketplace or using DirectPay in a timely manner and according to the UFA procedures.
- any tuition or fees charged by a participating school or postsecondary institution that exceed the Utah Fits All Scholarship amount shall be the parent's responsibility.
- The parent is responsible for the repayment of all ineligible expenses and any eligible expenses spent in excess of the amount of the Utah Fits All Scholarship.
- all contracts entered into are the responsibility of the private parties involved.
- updating parent and student information if it changes.
- If a participating student becomes ineligible to participate in the program for any reason or withdraws from the program, the participating student's Utah Fits All Scholarship will be closed, and any remaining funds returned to ACE Scholarships for redistribution.

ALLOWABLE SCHOLARSHIP EXPENSES

Scholarship expenses are defined as an expense that a parent or scholarship student incurs in the education of the scholarship student for a service or goods from a qualifying provider. In the event that your scholarship student exhausts their scholarship funds, you will need to use an alternate method of payment to pay qualified providers.

Utah Fits All scholarship funds may only be used for educational purposes meant to serve students' learning and educational development. The following chart addresses categories of scholarship expenses that can be approved by the Utah Fits All Program and examples are in Appendix A:



- Tuition and fees of a qualifying provider
- Fees and instructional materials at a technical college
- Tutoring services



- Fees for after-school or summer education programs



- Textbooks, curricula, or other instructional materials, including any supplemental materials or associated online instruction that a curriculum or a qualifying provider recommends
- Educational software and applications
- Supplies or other equipment related to a scholarship student's educational needs
- Computer hardware or other technological devices that are intended primarily for a scholarship student's educational needs



- Fees for the following examinations, or for a preparation course for the following examinations, that ACE Scholarships approves:

- A national norm-referenced or standardized assessment described in Utah Code 53F-6-410, an advanced placement examination, or another similar assessment
- A state-recognized industry certification examination
- An examination related to college or university admission



- Educational services for students with disabilities from a licensed or accredited practitioner or provider, including occupational, behavioral, physical, audiology, or speech-language therapies
- Contracted services that ACE Scholarships approves and that an LEA provides, including individual classes, after-school tutoring services, transportation, or fees or costs associated with participation in extracurricular activities



- Ride fees or fares for a fee-for-service transportation provider to transport the scholarship student to and from a qualifying provider, not to exceed \$750 in a given school year
- Expenses related to extracurricular activities, field trips, educational supplements, and other educational experiences



- Any other expense for a good or service that a parent or scholarship student incurs in the education of the scholarship student
- Any other expense for a good or service that ACE Scholarships approves as a scholarship expense in accordance with [HB0215](#)



- Utah Fits All Scholarship funds can't be used for post-secondary expenses if the scholarship student has graduated from a secondary school or its equivalent,
- but post-secondary expenses for K-12 students are approved.

UTAH FITS ALL SCHOLARSHIP PROGRAM SCHOOL ELIGIBILITY

Utah Fits All Scholarship funds can be used to pay tuition at an eligible school. For an eligible school to be qualified and accept scholarship funds, it must be a private school or a Local Education Agency (LEA)—a public authority responsible for education in a specific area, like school districts, school boards, or other local government bodies, handling public schools and educational programs within their jurisdiction.

If they are qualified providers and have completed the ClassWallet registration process, parents are able to make payments directly to eligible schools using Utah Fits All Scholarship funds through their student's digital wallet. If a family chooses to use an eligible school that is not a qualified provider the family will need to make the payment and then seek reimbursement. Tuition and fees are approved expenses through the Utah Fits All Scholarship Program.

Being awarded a UFA scholarship does not guarantee enrollment in a private school. ACE Scholarships will not notify schools about the student's scholarship award, this is the responsibility of the parent. Parents need to follow the enrollment process and procedures for the schools they choose to enroll their scholarship student(s). ACE Scholarships has no control over a school's enrollment decisions.

Note: The parents or immediate family members of a scholarship student may not receive scholarship funds as payment for time spent educating their child or sibling.

Any district or charter school that wishes to participate may become a qualifying provider if they provide the required information to the Utah Fits All Program Manager, describing the services, courses, and programs with the associated fees they plan to offer UFA scholarship students. Once the public school is onboarded with the Utah Fits All Scholarship Program, families may use their scholarship funds to directly pay for services provided by the school. If a student is awarded the UFA scholarship, they must be disenrolled from a public school no later than the start of the school year in which they wish to use the scholarship. The Utah Fits All program recommends completing the process of disenrollment shortly after the current school year.



Note: If a student's preferred school is not on the qualified provider list, families may contact us and we will invite the school to apply to become a qualified provider. The application to become a qualified provider is on the [Utah Fits All Program website](#).

Academic Accountability

Participating schools are held accountable to the Utah Fits All Scholarship account holder (i.e., the parent of a participating student) for meeting the educational needs of the participating student. This means that, at a minimum, the participating school must annually provide the account holder with a written explanation of the participating student's progress.

Contracts with Schools

Any contract a family signs with a school is the responsibility of the parties represented in the contract. Please carefully read the terms of the contract to ensure that you understand refunds, payment schedules, etc., prior to signing. It is the family's responsibility to fulfill the contract's terms. Depending on the school you choose, Utah Fits All Scholarship funds may not cover the entire cost of tuition. The student's parent is responsible for ensuring the balance is paid in full. The Utah Fits All Scholarship Program and Utah State Board of Education are not parties to the school-family contract and cannot void a private contract, give legal advice, or arrange payment schedules.



ACCOUNT HOLDER OPTIONS FOR TRANSFERRING SCHOOLS

The following options are available for re-enrollment in a new school after a withdrawal from the student's current school:

Enroll the student in a participating school

- The remainder of the Utah Fits All Scholarship can be used at another participating school the student is transferring to, if that school accepts them for enrollment, and the previous school has received payment for any previously rendered services. If tuition has been paid and funds are owed to the student, the first school will need to remit the payment directly to the student's scholarship account. If needed, ACE Scholarships may prorate the scholarship funds between the two providers based on the time the scholarship student received goods or services.

Enroll the student in a homeschool

- If the parent selects this option, the previous school will need to receive any payments due for any rendered services from the student's Utah Fits All scholarship.
- The parent must notify ACE Scholarships of their change to homeschool.
- Remaining scholarship funds can be used for homeschool curriculum and other approved educational expenses for the scholarship student.

UTAH FITS ALL SCHOLARSHIP PROGRAM SERVICE PROVIDERS ELIGIBILITY

Utah Fits All Scholarship funds can also be used to pay for services and materials provided by an eligible service provider. For a service provider to be approved as a qualifying provider and accept scholarship funds, the provider must offer educational services, programs or materials that the UFA Program Manager, ACE Scholarships, approves.

An eligible service provider can accept Utah Fits All Scholarship funds through the student's digital wallet only if they apply to become a qualifying provider through the Utah Fits All Scholarship Program. If families want to use the digital wallet for these expenses they can either use marketplace vendors or they can refer their preferred providers to apply to become qualified providers on the [Utah Fits All Scholarship Program website](#).



EXAMPLES OF ELIGIBLE SERVICE PROVIDERS




TEXTBOOK DISTRIBUTORS



CURRICULUM PROGRAMS



SPECIALIZED CONTRACTED SERVICES



TUTORING



EXTRACURRICULAR ACTIVITIES (FROM LEA)



AFTER SCHOOL PROGRAMS



SUMMER CAMPS



EDUCATIONAL ONLINE COURSES



APPROVED EDUCATIONAL SERVICES



MUSIC LESSONS AND INSTRUMENT PROVIDERS



EDUCATIONAL MATERIAL DISTRIBUTERS






APPROVED THERAPIES SERVICES

PRE-APPROVED AND DENIED EXPENSES

There are many educational options available for scholarship students to spend their scholarship funds on. While scholarship funds can be used for approved educational purposes, there may be some purchases that need to be pre-approved by ACE Scholarships. When seeking pre-approval, you will need to submit the reason for the request and demonstrate how it fits in the student's curriculum. If a parent purchases an item or service out of pocket without pre-approval for a non-approved expense, they take a chance that it may not be approved for reimbursement. Purchases that do not fit into one of the categories outlined in statute will be denied (Utah Code 53F-6-402). Examples of allowable, pre-approved and prohibited expenses are listed in Appendix A.

SCHOLARSHIP EXPENSE LIMITATIONS

-  Scholarship funds may only be used to purchase educational goods and services for which a scholarship student is the sole user.
-  Scholarship funds may not be transferred between any participating scholarship students.
-  Residential facility and travel expenses other than the transportation expenses listed above are prohibited.

Misuse of scholarship funds may constitute disqualification from the UFA program.

TERMS OF THE UTAH FITS ALL SCHOLARSHIP

A student **currently receiving Utah Fits All Scholarship funds remains** eligible for the Utah Fits All Scholarship Program until the student:

- Enrolls in a public school (district or charter) or the SOEP
- Is no longer a resident of the state of Utah
- Is suspended or terminated from the Utah Fits All Scholarship Program
- Graduates or withdraws from high school*
- Special education student reaches 22 years of age

*Certificates of attendance do not equal graduation from high school for the Utah Fits All Scholarship Program. A student may continue in the program until they receive a high school diploma or receive a passing score on all subtests of the General Educational Development test (GED) or High School Equivalency Test (HiSET).

APPEALING A DENIAL

A scholarship student or a scholarship student's parent may appeal any administrative decision of the UFA program manager for resolution including:

- A. Determinations regarding enrollment eligibility, enrollment preference category, suspension, or disqualification
- B. Scholarship expense denials

A scholarship student's parent or scholarship student, if 18 years old, may appeal any administrative decision of the UFA Program Manager, ACE Scholarships, for resolution within 30 days after the day of the appeal. Information regarding the appeals process is available on UFA's website and on the scholarship application. There are two types of appeals, including denied scholarship expenses and eligibility preference or denial. The appeal process is as follows:

Step One:

1. Notice of expense denial, eligibility preference, or application denial, suspension, termination, and/ or removal shall be provided electronically by the UFA Program Manager.
2. An appeal shall be submitted by the scholarship parent to the UFA Program Manager within ten (10) business days of receipt of the notice of the expense denial or eligibility preference or application denial, suspension, termination, and/or removal.
 - a. To file an appeal, a scholarship student's parent shall complete an appeal form emailed to them in their denial notification, and provide the required information and documentation to verify eligibility or expense claims as required by the Utah Fits All Program manager.
 - b. Appeal forms submitted after the ten (10) business day deadline will not be processed and will receive a notification of a denied status.
 - c. Incomplete appeal forms, or appeal forms with vague language that does not clearly articulate the issue on an appeal will receive a notification and additional information may be required before submitting an appeal to the UFA Appeals Committee.

3. Appeals shall be reviewed by the UFA Appeals Committee and a decision shall be issued within thirty (30) calendar days.

- a. The UFA Appeals Committee will include UFA scholarship parents as members of the committee.
- b. The UFA Appeals committee will make determinations regarding eligible expenses and enrollment preference or eligibility or suspension or disqualification according to [Utah Code 53F-6 Part 4](#) and their associated codes.

Step Two:

1. The scholarship parent shall be notified by the UFA Program Manager of the UFA Appeals Committee decision in step one (1) of the appeal process electronically within thirty (30) calendar days of receipt.
2. If the UFA Appeals committee reverses an administrative decision of the program manager on internal appeal, the program manager may not withhold scholarship funds or application approval for the scholarship student on account of the appealed administrative decision unless as the resolution of the internal appeal expressly allows.

REPAID FUNDS

According to Utah Code 53F-6-402(7), if a qualifying provider, scholarship student, or scholarship student's parent repays an expenditure from a scholarship account for an expense that is not approved, the program manager shall credit the repaid amount back to the scholarship account balance within 30 days after the day on which the program manager receives the repayment. The only exception is in cases in which a scholarship student or the scholarship student's parent is convicted of fraud in relation to scholarship funds.

REFUNDS

There may be circumstances where a qualifying provider will be required to refund scholarship funds to a student's account for payment of services that have not been rendered. For example, if a scholarship student uses scholarship funds to pay for an entire semester of private school and then decides to transfer to a different educational provider mid-semester, scholarship funds for the time after the student withdrew must be repaid. The qualifying provider has 30 days to process the refund from when they are notified by ACE Scholarships by email. Refunds can only be made directly to a scholarship student's scholarship account; no other method can be used.

UNUSED FUNDS

Parents are encouraged to spend the entire scholarship each year as any funds remaining at the end of the school year will be returned to ACE Scholarships.

ACCOUNT HOLDER SUSPENSION FOR MISUSED FUNDS

ACE Scholarships may suspend a scholarship student's eligibility for the program in the event of the scholarship student's or the scholarship student's parent's:

- A. Intentional or substantial misuse of scholarship funds.
- B. Violation of the terms of the program.

If ACE Scholarships obtains evidence of fraudulent use of scholarship funds, the case will be referred to the attorney general for collection or criminal investigation.

The state board, scholarship student, and scholarship student's parent will be notified in writing of the suspension, that no further transactions, disbursements, or reimbursements are allowed, and that the scholarship student or scholarship student's parent may take corrective action within 10 business days of the day on which the program manager provides the notification, and that without taking the corrective action within the time period, the program manager may disqualify the student's eligibility.

If ACE Scholarships determines a UFA parent (account holder) has misspent funds, the parent will be required to repay the misspent funds, and the program manager may remove their student from eligibility for a Utah Fits All Scholarship. Suppose the student has exited or been removed from the Utah Fits All Scholarship Program and the program manager sends a notice that the parent holder must repay misspent funds. In that case, the parent must mail ACE Scholarships a certified check or money order matching the amount of the misspent funds' determination.

Checks or money orders should be made payable to ACE Scholarships, the program manager. With the check or money order, the parent must include a letter with the student's name, the parent's name, and the reason the funds are being returned to the state.

Mail the check and letter to:

ACE Scholarships
 ATTN: Utah ESA Accounting
 5251 DTC Pkwy, Ste 300
 Greenwood Village, CO 80111

CHAPTER 4: USING A DIGITAL WALLET

SCHOLARSHIP PROGRAM PAYMENTS

ClassWallet is the Utah Fits All Scholarship Program account management partner. The DirectPay feature and the ClassWallet marketplace are both quick and easy ways to spend funds directly toward approved educational expenses with qualifying providers. If a parent would like to purchase an education related expense that they do not see offered in the marketplace or provider list, they may pay out of pocket and submit a receipt for reimbursement in ClassWallet.

Note: To ensure a wide range of eligible service providers, ACE Scholarships is open to accepting new providers anytime during the school year. A current list of qualified providers participating in the UFA program can be found on the [Utah Fits All Program website](#). This list will grow and be updated regularly. You may refer any provider you plan to use to our website to apply to become a qualified provider. Accepting new service providers meets the ongoing mission of giving options to scholarship families.

HOW TO PAY PROVIDERS FOR SERVICES



Parents receive funds via Digital Wallet



Approved providers add their business banking information



Parents pay providers with Digital Wallet funds



Digital Wallet funds are directly deposited into providers bank account

UFA SCHOLARSHIP ACCOUNTS

Upon approval of the student's application, the parent will receive a Welcome Email from ClassWallet that contains important information on accessing their student's UFA scholarship funds. Each scholarship student will have their own account and purchases should be made only for the student from their own scholarship funds. **Note:** See step-by-step instructions on making payments and purchases using your student's UFA funds through ClassWallet in Appendix B.

Note: Providers may not receive payments from multiple sources for the same services paid using Utah Fits All Scholarship funds. Violating this rule could lead to civil and criminal penalties for the parties involved.

Remember, Utah Fits All Scholarship Program funds are specifically meant for qualified scholarship expenses, and any costs not falling under the scholarship expense category cannot be included on the invoice. Those expenses may be paid for using alternative payment methods.

Note: If ACE Scholarships finds an invoice contains ineligible items or lacks sufficient details during the review, it will be sent back to the scholarship student's parent for correction or clarification. The parent must work with providers to address the issue. Once everything is updated or clarified, the parent can resubmit the invoice for further review.

INVOICE REQUIREMENTS

Providers can issue invoices to participating families at the cadence they choose, but are responsible for including the detail required to receive approval. Invoices should break down each scholarship expense. It's an essential step to keep everything transparent and well-documented. Invoices must include the following components:

- **Scholarship student's full, legal first and last name**
- **Date(s) of service**
- **Invoice date**
- **An itemized list of scholarship expenses with a detailed description**
- **Total amount due**
- **Payment due date**



EMAIL SENT

30 DAYS



NEED REFUND



IMPORTANT INFORMATION ABOUT QUALIFYING PROVIDER DISCRETION

A qualifying provider is not obligated to take or enroll eligible students who do not meet their specific enrollment criteria or if they are already at capacity. Both parents and qualifying providers must be open about their needs and capabilities before entering into contractual agreements. This ensures everyone is on the same page and can make informed decisions.

DISPUTES ABOUT SERVICES PROVIDED TO STUDENTS

If any questions or disputes arise concerning the services provided to students through the Utah Fits All Scholarship Program, the qualifying provider and the parents of a scholarship student need to address these matters directly. Likewise, any questions or disputes involving the qualifying provider, its subcontractors, independent contractors, or other third parties should be resolved between those parties. It's important to note that the Utah Fits All Scholarship Program, ACE Scholarships, are not involved in these disputes and won't interfere with the contractual obligations arising from these agreements. Parents will be given the opportunity to rate their qualified providers on the services given to their scholarship student through a survey link that will be sent to them by email.

CHAPTER 5: RESOURCES AND SUPPORT

STAY INFORMED

All families can sign up for updates to the program and other news and information by visiting our Utah Fits All Scholarship Program website and clicking the link to join our mailing list. Subscribers will receive newsletters containing program information, events, and more.

HANDBOOK UPDATES

This handbook will be reviewed and updated regularly to align with the latest legislation, court decisions, and best practices. We'll notify you through our website and email when there are significant updates to the handbook. Always check the date at the bottom of the first page of the handbook to ensure you have the latest version.

RESOURCES AND SUPPORT

Information regarding the Utah Fits All Scholarship Program will be available within this handbook, and up-to-date information is always available on our website in both English and Spanish.

If you have questions about the Utah Fits All Scholarship Program, or require support, you can visit our website to get help with specific

questions using chat, email, or contact our support team by phone. Support is available in both English and Spanish. For technical issues, you can submit a ticket through the dashboard portal for a program specialist to investigate and resolve the matter.

GENERAL INFORMATION

Contact us at info@UFAScholarship.com

If you need help with the following:

- Need more information regarding the program
- Questions regarding student eligibility
- Questions about the waitlist or lottery
- Questions about approved expenses

You can also call our support team at 385-503- UFAS (8327)

TECHNICAL HELP

Issue a ticket at info@UFAScholarship.com

If you need help with the following:

- Questions about the application
- Questions regarding required documentation
- Uploading a required document for your application
- Pre-approval request for an educational expense
- Help submitting a receipt for reimbursement
- Help using ClassWallet

You can also call our support team at 385-503- UFAS (8327)

APPENDIX A: UTAH FITS ALL PROGRAM

EXPENSE GUIDELINES AND LIMITATIONS

ACE Scholarships is honored to serve as the program manager of the Utah Fits All Scholarship Program. ACE Scholarships desires to empower parents in their educational choices for their students. It would be impossible to create an exhaustive list of all expenditures that might be incurred in the education of a scholarship student. What ACE Scholarships can provide are examples of expenses that you may consider that could be funded with your Utah Fits All Scholarship funds, as well as a few that are expressly prohibited, according to the language of the law that created the program (Utah Code Annotated 53F-6 Part 4).

If you do not see an item you are considering either on this list, or that fits naturally in one of the categories below, or if you are concerned about whether something will be approved, please feel free to reach out to us and ask. We are here to help you make the most of your student’s education. If it is an expense that can legitimately be tied to the education of your child, and it is not expressly prohibited by the law, it is likely to be approved.

As the program grows and we receive feedback from scholarship families, we will update this document and add more items to the list that do not need pre-approval. We encourage you to check back often.

We wish you and your student the best in your educational journey!



TUITION & FEES

<p>APPROVED: Tuition and fees of a qualifying provider</p>
<p>Examples of types of qualifying providers that may offer tuition and fees: Microschool, college or university, private school, LEA, online schools or instructors</p>
<p>Allowable fees include: Tuition, fees for books or other educational materials, educational field trips, computer lab fees, science lab fees, activity fees, musical instrument fees, technology fees, registration/application or enrollment fees, athletic fees; independent study course</p>
<p>Prohibited fees include: Room and Board fees, meal fees, early withdrawal fees, late fees, non educational field trip fees, or other non-educational fees</p>

TECHNICAL COLLEGE

APPROVED: Fees and instructional materials at a technical college

Career and technical education is a term applied to schools, institutions, and educational programs that specialize in skilled trades, applied sciences, modern technologies, and career preparation. *Reminder that a scholarship student cannot have graduated from high school.

Allowable fees include: Fees for books or other instructional materials, educational field trips, activity fees, technology fees, examination fees, registration/application or enrollment fees

Prohibited fees include: Room and Board fees, meal fees, early withdrawal fees, late fees, non educational field trip fees, or other non-educational fees

TUTORING

APPROVED: Fees for tutoring or private lessons

Tutors must provide a bachelor's degree in education or field related to tutor concentration. If the tutor has not yet obtained a bachelor's degree, they may submit a transcript of completed coursework

Scholarship student's tutor may not be a parent or other immediate family member

PROGRAMS

APPROVED: Fees for after-school or summer education programs

After school and summer programs must be educational in nature. Curriculum or program outline will be collected from all qualifying providers who complete an application to provide one of these services. Some examples are academic programs that focus on STEM, language immersion programs, study abroad programs, and internships

Allowable fees include: Program fee, fees for books or other educational materials, educational field trips, activity fees, technology fees, registration/application or enrollment fees, athletic fees

Prohibited fees include: Room and Board fees, meal fees, early withdrawal fees, late fees, non educational field trip fees, or other non-educational fees

CURRICULA

APPROVED: Textbooks, curricula, or other instructional materials, including any supplemental materials or associated online instruction that a curriculum or a qualifying provider recommends

To receive approval for supplemental materials, documentation must be provided that clearly demonstrates that the item is recommended or required by a curriculum or course of study, though the specific words "recommended" or "required" need not be present. When providing documentation, please highlight, or otherwise indicate with page numbers, screenshots, or any other method that specifies exactly where the item is: required or recommended, or other language that indicates or conveys that the item is needed or necessary to complete the curriculum. This documentation can include, but is not limited to:

Allowable fees include: Allowable curriculum examples: Teacher guides, teacher manuals, courses of study, class learning objectives, learning guides, study guides, lesson plans, activity guides

Note: Utah Fits All does not limit faith based curriculum

Allowable materials and associated online instruction recommended by a qualifying provider. Examples: Online courses accessed from a university that are related to the area of instruction

Allowable curriculum and materials independent of a qualifying provider recommendation. Examples: project oriented materials related to any area of instruction

SOFTWARE

APPROVED: Educational software and applications

Educational software and applications must be age, grade and or developmentally appropriate for the student for whom it is purchased

Prohibited purchases include: Streaming services, including but not limited to Hulu, Disney +, Netflix, Sling, Fubo and Apple TV

SUPPLIES

APPROVED: Supplies or other equipment related to a scholarship student's educational needs

Examples: Consumables and other school supplies including but not limited to writing implements (i.e. paper, pens, pencils, crayons, highlighters, chalk, dry erase markers), staples, staplers, tape, glue, erasers, white out, post its, clips, fasteners, scissors, printer ink, index cards, poster board, etc.

- Books, including but not limited to audio, digital and players and educational magazines (including magazine subscriptions)
- Folders, files, binders, notebooks, planners, calendars, dividers, sheet protectors, hole punchers, etc.
- Education related manipulatives including but not limited to items that promote counting, measuring, shapes, addition (i.e. math cubes, dominoes, blocks and tangrams)

SUPPLIES CONT.

- Calculators (standard, graphing or scientific), compass, protractors and rulers, microscopes, telescopes
- Board games, strategy games and puzzles
- School mats or rugs (Ex: circle time rugs with letters, numbers, shapes, colors, maps, etc.)
- Craft/Art supplies
- Dry erase boards, bulletin boards and easels
- Educational kits (may be purchased for up to one year from the date of purchase only), flash cards, atlases, maps, globes
- Backpacks and laptop bags
- Student specific workspace furniture or supplies (i.e. desk, desk chair, bookshelf, desk lamp, desk organizer) – May only be purchased once every 3 years per student

EXAMS

APPROVED: Fees for the following examinations, or for a preparation course for the following examinations, that the program manager approves:

- a national norm-referenced or standardized assessment
- an advanced placement examination, or another similar assessment
- a state-recognized industry certification examination
- an examination related to college or university admission

HARDWARE

APPROVED: Computer hardware or other technological devices that are intended primarily for a scholarship student's educational needs

- Laptop purchases for each student once every 3 years
- Tablet purchases for each student once every 3 years.
- Technological devices (i.e. external devices printers, mouse, webcam, microphones, headphones, 3D printers, digital camera, etc.) are approved.

Items that require pre-approval with the provision of a curriculum, coursework or program supply list: Gaming devices (i.e. products made by Nintendo, PlayStation, Xbox, etc.); Virtual Reality equipment

Prohibited items: General household internet; Cell phones and cell phone plans; home theater and home audio equipment

SPECIAL EDUCATION

APPROVED: Educational services for students with disabilities from a licensed or accredited practitioner or provider, including occupational, behavioral, physical, audiology, or speech-language therapies

- Disability must be education related, and affect the acquisition of knowledge or skills
- Parents of scholarship students wishing to process an expense for any of the services listed above will be asked to produce their student's Individualized Education Program (IEP), Service Plan or a written note from the child's treating physician.
- Allowable expenses will extend to education related technological devices, supplies or equipment purchased for the scholarship student's use during these services.

CONTRACTED SERVICES

APPROVED: Contracted services that the program manager approves and that an LEA provides, including individual classes, after-school tutoring services, transportation, or fees or costs associated with participation in extracurricular activities.

Prohibited: Students may not be enrolled in the LEA in which they are accessing contracted services.

TRANSPORTATION

APPROVED: Ride fees or fares for a fee-for-service transportation provider to transport the scholarship student to and from a qualifying provider, not to exceed \$750 in a given school year

- Parents or other immediate family members are prohibited from paying themselves for gas or other transportation related costs incurred during the transportation of their own child to and from an approved provider.
- Receipts submitted for reimbursement must show details of the ride for the scholarship student, including pick up and drop off locations, date and total cost.
- Allowable transportation expenses include pick up and drop off point as home, school or other qualifying provider. No additional stops may be included in the receipt in order for the receipt to be approved.
- Transportation costs are restricted to \$750 total per student per year.

Examples of approved transportation fees: Ride share (i.e. Lyft, Uber, etc.), vanpool service, transportation company

Prohibited expenses include: Any ride fees or fares for parent/guardian who may be accompanying the scholarship student during travel. It does not include expenses related to a personal vehicle, payments, gas, insurance, etc.

EDUCATIONAL EXPERIENCES

APPROVED: Expenses related to extracurricular activities, field trips, educational supplements, and other educational experiences.

ACE Scholarships may request to review curriculum, program or grade level learning materials and expectations to ensure compliance.

Extra-curricular expenses: Are *only* for the scholarship student, not parents, siblings, or chaperones. These activities generally take place in clubs, classes, teams, orchestras, bands and other groups:

1. Examples of approved extracurricular activities: athletics, ballroom, dance, band, orchestra, music, drama, student government, community service clubs, debate, language clubs, STEM, DECA, FBLA, 4-H, scouting, robotics, etc.
2. Examples of approved extracurricular related expenses: related equipment, uniforms, transportation (as outlined in transportation, to and from a location related to the activity), club participation, instrument rentals, etc.

Educational experiences and field trips: Are approved for the individual scholarship student. The purchase of an accompanying parent ticket is approved per scholarship family, as appropriate for the activity:

1. Examples of approved field trips: museums, art centers, aquariums, zoos, gardens, farms, national or state parks, conservation centers, capitol building, historical sites, etc. for educational purposes, not entertainment venues.
2. Examples of approved field trip related expenses: admission tickets, educational activities at the venue (i.e. buying tickets to the IMAX show at the planetarium).

EDUCATIONAL EXPERIENCES CONT.

3. Examples of approved educational experiences: shows (i.e. musicals, ballet, play), orchestra performances, historical, reenactments, etc.
4. All other trips, shows or concerts require pre-approval.

Annual family memberships are approved for museums, aquariums, planetariums, state and national parks, city recreation centers, etc. Parents will need to decide which scholarship student's funds they wish to charge the expense. If you have a question about a family membership or would like pre-approval please inquire at our help center or contact our customer support team.



PROHIBITED EXPENSES

Prohibited use of UFA Funds:

- Residential Treatment Facilities
- Travel expenses other than fee for service transportation services, including but not limited to gas, airfare, meals and lodging
- Paying for a parent or guardian's time educating their student
- Blades or knives or items that include blades or knives
- Firearms
- Cell phones and cell phone plans
- General household internet
- Streaming services including but not limited to Disney+, Hulu, Sling, DirectTV, Fubo, philo, apple TV, Paramount, Starz, etc.
- Food, including but not limited to candy, gum, culinary ingredients, or pre-measured "do it yourself" ingredient kits
- Tools, materials or supplies for the purpose of home construction or refinishing (for example, finishing an unfinished room or area of the home to be used as an educational space."
- Household items (Electronics) including but not limited to digital routers, digital radios, radio scanning devices/ base stations, surround sound systems, televisions and t-shirt screen printing machines
- Household items (common area furniture): including but not limited to couches, lounge chairs, beds, bedside tables, dressers, coffee tables, etc.
- Household items (other) including but not limited to kitchen appliances, cookware, buckets, toilet paper, paper towels, tissues, cleaning products, disinfecting wipes, storage bins
- Medical equipment including but not limited to CPR/first aid training dummies, first aid kits, bandages and other first aid consumables and supplies
- Recreational items including but not limited to swimming pools, pool tables, jacuzzis, bounce houses, bicycles, roller blades, trampolines and inflatable slides
- Theme park admissions or annual passes
- Toys including but not limited to action figures, toy cars/trucks and remote-controlled vehicles



APPENDIX B: HOW TO USE CLASSWALLET

HOW TO SHOP THE MARKETPLACE

Families can make educational purchases from a variety of approved vendors through the ClassWallet marketplace. Step-by-step instructions are provided below. In addition, a video tutorial on shopping in the marketplace is available [here](#).

Step 1: After logging in to ClassWallet, to begin shopping, select "Shop" from the menu (3 lines on top left of the ClassWallet homepage) or click on "Start Shopping" from the Shop tile

Step 2: The marketplace landing page will show discounted shipping offers, best sellers, and trending stores and give the option to view all available stores. Vendors currently offering F=free shipping are displayed at the bottom, along with the corresponding amounts needing to be spent to activate the offer. To see all vendors available to you in the Marketplace, click the "View All Stores" button. You can select a category to narrow your search or select a store, by clicking on the blue "Shop" on the store's icon.

Step 3: After choosing the vendor and selecting the items you wish to purchase, you will be redirected to the vendor's checkout page and then redirected to your student's ClassWallet account to finalize the payment. You will see an option as transfer, send cart to procurement, or checkout. After clicking on the blue checkout button you'll have three steps to complete the payment process. These steps will allow you to do the following:

1. Step 1 allows you to pay for the order by entering the dollar amount from your ClassWallet digital balance. If you have insufficient funds, you will be prompted to go to Step 2.
2. If needed, Step 2 lets you pay any remaining balance using your personal credit card. NOTE: This step disappears if your student has enough UFA funds to complete the transaction.
3. Step 3 directs you to select the categories related to your order. These categories are determined based on the UFA approved expense categories.

After entering all the required information and clicking on the blue "Next" button below the order total, a new screen will appear requesting you to confirm your current shipping address.

Once confirmed, the payment will go through and the order will be submitted for processing. No further action is needed on your part. You will be sent a confirmation email and the order will be sent for fulfillment and shipped to the address you provided.

PAY A PROVIDER USING DIRECT PAY

Go to your ClassWallet account and select [Pay Vendor](#) on the homepage. You will need your invoice or receipt to complete the payment. Step-by-step instructions on using Direct Pay are available below. In addition, a video tutorial is available [here](#).

Step 1: Select the vendor. You can find your vendor by typing the name or using the search features. When you find your vendor, click PAY.

Step 2: You will be prompted to enter the payment amount that matches your invoice total.

Step 3: Upload supporting documents (invoice, receipt, etc.). You can drag and drop the image or click BROWSE to search your saved image files. You can upload multiple documents in a single transaction. Please note JPEG, PNG, or PDF (10 MB, 5 pages max) is the file format and size accepted.

Step 4: Choose the purse that will fund the transaction and select the appropriate expense category for the expense.

Step 5: (OPTIONAL) Enter additional information or comments for the UFA program manager

Step 6: Review your transaction; if everything is correct, click NEXT, and your order will be submitted. You will receive a confirmation email.

Step 7: The transaction will be reviewed and either approved or rejected by the UFA program manager.



MANAGE ORDERS

You can check the status of an order at any time and even cancel an order submitted by mistake.

[How to check the status of orders submitted](#)

[How to cancel an order](#)

[Uploading additional documents](#)

REIMBURSEMENTS

If you are unable to find your preferred vendor in the ClassWallet platform, you can refer them to the [Utah Fits All Program website](#) to apply to become a qualified provider.

Using the ClassWallet platform marketplace is the easiest, safest, and quickest way to make payments and purchases. However, if there is an approved educational expense that you need to pay for and you cannot use the platform, you can pay using your own funds and request reimbursement through ClassWallet. You will need to have your complete receipt or invoice showing the name of the provider, the date of service or purchase, the list of qualified expenses with a description of the service or product, and the total amount paid (see invoice requirements above). Step-by-step instructions on submitting a reimbursement through ClassWallet are provided below. In addition, a video is available here. When submitting receipts it is important that they include ONLY approved educational expenses for the scholarship student or they will be denied.

Note: You can save time and effort by preparing all of your expenses and combining them into a single reimbursement request. There is no limit to how many receipts you can upload in a single transaction. As a reminder, you will need to have your receipts or invoices available to upload to complete the reimbursement request.

Step 1: Select 'Start New Reimbursement' from the menu or click the 'Start New Reimbursement' button on the ClassWallet homepage.

Step 2: Add details for your transaction, including the name of your vendor and the dollar amount for your reimbursement transaction.

Step 3: Upload your documentation. You can upload as many images as necessary to document the transaction. Please note JPEG, PNG, or PDF (10 MB, 5 pages max) is the file format and size accepted.

Step 4: Choose Purse. The final step is to choose which purse you want to use and make sure all the information is correct. Once complete, click the green 'Next' button and your reimbursement request will be submitted to the UFA program manager for review. You will receive an email after submitting the request and once the reimbursement request is approved, a transfer will be initiated to your bank account. This typically takes 2-10 days after approval.

APPENDIX C: FREQUENTLY ASKED QUESTIONS



WHAT IS THE UTAH FITS ALL (UFA) SCHOLARSHIP PROGRAM?

The Utah Fits All Scholarship Program, launching for the first time in the 2024-2025 school year, offers tax free scholarship funds to eligible students for use toward eligible education related expenses.

WHO IS ADMINISTERING THE PROGRAM?

The Utah Fits All Scholarship Program is administered by ACE Scholarships, a non-profit organization founded in 2000 to provide K-12 students from lower income families with scholarship funds to attend private schools. ACE is proud to have been serving Utah families since 2022 by partnering with 26 private schools and administering more than 160 scholarships totaling over \$500,000. ACE Scholarships is contracted with the Utah State Board of Education for the administration of the Program.

HOW DO I KNOW IF MY CHILD IS ELIGIBLE?

A student who is a resident of Utah, including a child of a military service member, as defined in [Section 53B-8-102](#); eligible to participate in K-12 (at least 5 years old and no more than 18 years old on or before September 1 of the year in which you are applying), does not receive the Carson Smith Opportunity Scholarship; is not enrolled in an LEA or in the Statewide Online Education Program (SOEP) upon receiving the scholarship.

WHEN DO APPLICATIONS OPEN FOR STUDENTS? IS THERE AN APPLICATION WINDOW?

Yes, there is an application window for eligible students. Applications for students will open on February 28, 2024 and will close April 22, 2024.

WHAT DOES THE APPLICATION PROCESS ENTAIL?

The UFA application process is simple and light touch. Family members will create an account with their email address and a password. We verify the applicant's identity, as well as their Utah residency with a phone number and date of birth. An applicant may be asked to upload a photo of a government issued photo ID if their information has recently changed. The applicant will then be asked to verify their household income by entering their household size and linking to either their employer payroll or bank through an effortless, secure process. The applicant may also opt to upload documentation manually. Finally, they will enter information for each student whom they wish to apply for, including the student's name, date of birth and grade level. The last step is agreeing to the requirements of the program.

It's important to note that an applicant is not required to provide any income verification information. There are a couple of ways that any applicant may manually bypass income verification, with the understanding they will be placed in the last enrollment preference category. The first is on the initial screen for income validation.



They will have the option to "continue" or "skip income verification." If the latter is chosen, they will see a screen reminding them that the application will be placed in the last enrollment preference category. If they choose to proceed, they will bypass income verification.

The second chance to bypass is when they are prompted to enter their household size. Based on the calculation of a total household income of 555%, we ask if their household income exceeds this figure. If they choose "yes," they are attesting that their income places them in the last enrollment preference category, and no further income information is collected.

Additionally, it's important to note that if we verify a family is using government assistance, like SNAP, we do not require that applicant to upload any additional information.

WHEN WILL I FIND OUT IF I'VE BEEN APPROVED?

Within 24-48 hours of submitting an application, families will receive a notification verifying their student's eligibility in the program, as well as the enrollment preference category they belong to. This notification means we have verified the student as a K-12 eligible student who is a state resident. Approval notifications will go out no later than May 3, just a few short days following the close of the application window. Because applications must be assigned an enrollment preference, we are unable to make award notifications prior to the close of the window. If a student is placed on the waitlist, the email notification will include that student's place in line, along with a link to the ACE Access portal where families can check their waitlist placement throughout the school year.

HOW ARE APPLICATIONS PLACED IN AN ORDER OF PREFERENCE?

For 2024-2025 school year there are three levels of preference:

1. Students whose family income is at the 200% Federal Poverty Level or less will be awarded scholarships first.
2. Next, are students whose family's income is between 200-555%.
3. Last, it is open to all Utah K-12 students regardless of family income.

WILL THE APPLICATION PROCESS BE DIFFERENT IF MY CHILD REQUIRES SPECIAL EDUCATION AND HAS AN IEP OR SERVICE PLAN?

No, we do not require any additional information during the application period for a student who requires special education.

CAN MY CHILD BE ENROLLED IN A PUBLIC SCHOOL WHILE PARTICIPATING IN THE PROGRAM?

A student may not be enrolled in a public (charter or district) school or in the State Online Education Program (SOEP).

However, any charter or district school that wishes to participate as a qualifying provider can provide their information to the UFA program, including describing the services, courses and programs they plan to offer UFA scholarship students, with the associated fees. Once the public school completes the onboarding process, UFA families may use their scholarship funds to directly pay for services provided

by the school. SOEP providers may also become UFA providers, but UFA students cannot directly have a SEAT in the SOEP.

HOW MUCH IS THE AWARD AMOUNT, AND IS IT THE SAME AMOUNT FOR EVERY CHILD?

All scholarship students will be entitled to \$8,000 per school year. Funds do not roll over into the following school year, so families are encouraged to budget accordingly in order to maximize use of their student's funds.

HOW AND WHEN WILL MONEY BE DISBURSED TO FAMILIES?

Funds will be disbursed in early August 2024. A separate digital wallet will be established for each scholarship student. Parents can expect a single sign on using the ACE Access Portal, where their digital wallet dashboard will inform them of their student's account balance and any outstanding invoices. The digital wallet is where parents will upload invoices, initiate payments to approved vendors, request reimbursements and shop the digital marketplace for goods and services using their student's funds.

Though awarded students will receive the funds in their account in August, we encourage families (even those who are waitlisted) to save receipts for all education related expenses. Awarded scholarship students may submit for reimbursement for any time sensitive purchases prior to fund disbursement. Waitlisted students are also encouraged to keep track of receipts in the event they are awarded, they are able to upload receipts for reimbursement from July 1 until award date.

WHAT HAPPENS IF I USE MY CHILD'S FUNDS BEFORE THE END OF THE YEAR?

We encourage maximum use of every child's scholarship funds, since there will be no option to roll funds over into the following school year. If a parent exhausts their scholarship funds prior to the end of the school year, they must pay for education related goods and services by other means.

WHAT MAY SCHOLARSHIP FUNDS BE USED FOR?

A scholarship expense is an expense that a parent or scholarship student incurs in the education of the scholarship student for a service or goods that a qualifying provider provides. The following list describes the approved expense categories. Families are encouraged to reach out to an ACE customer service representative if they have questions about individual purchases.

1. Tuition and fees of a qualifying provider
2. Fees and instructional materials at a technical college
3. Tutoring services
4. Fees for after-school or summer education programs
5. Textbooks, curricula, or other instructional materials, including any supplemental materials or associated online instruction that a curriculum or a qualifying provider recommends
6. Educational software and applications
7. Supplies or other equipment related to a scholarship student's educational needs
8. Computer hardware or other technological devices that are intended primarily for a scholarship student's educational needs

9. Fees for the following examinations, or for a preparation course for the following examinations, that the program manager approves:
 - A national norm-referenced or standardized assessment
 - An advanced placement examination, or another similar assessment
 - A state-recognized industry certification examination
 - An examination related to college or university admission
 - Educational services for students with disabilities from a licensed or accredited practitioner or provider, including occupational, behavioral, physical, audiology, or speech-language therapies
 - Contracted services that the program manager approves and that an LEA provides, including individual classes, after-school tutoring services, transportation, or fees or costs associated with participation in extracurricular activities
 - Ride fees or fares for a fee-for-service transportation provider to transport the scholarship student to and from a qualifying provider, not to exceed \$750 in a given school year
 - Expenses related to extracurricular activities, field trips, educational supplements, and other educational experiences

Please keep in mind that this list is not inclusive of all allowable categories and expenses, and will include any other expense for a good or service that a parent or scholarship student incurs in the education of the scholarship student and the program manager approves. Details about a pre-approval process, where families may confirm the qualification of any scholarship expenses prior to purchase, are forthcoming.

WHAT IF I WOULD LIKE TO USE A SCHOOL OR SERVICE PROVIDER, BUT I DON'T SEE THEIR NAME ON THE LIST OF APPROVED PROVIDERS?

There are a few options that parents have. A parent can seek pre-approval for the expense, or make the purchase with their own funds, then submit a receipt of purchase and request reimbursement. We also encourage families to refer schools and providers they are engaged with, or would like to be engaged with, to apply to become a UFA qualifying provider. Families can also [use our referral form](#), providing us with some basic information about them. We will send families an email with information about the program they can share with their desired providers. Additionally, we will mail a postcard to the potential provider with an invitation to apply to become a qualifying provider.

DOES MY CHILD NEED TO TAKE THE STATE TEST?

No, it is not a requirement of the Utah Fits All Program that a student take a standardized test. In order to maintain eligibility in UFA each year, a student may complete and deliver to ACE Scholarships a portfolio describing the scholarship student's educational opportunities and achievements for the given year.

If a student attends a private school where they are already administered a norm referenced test, the family may submit proof that their student was administered the test, and the requirement is fulfilled.

If a student does not attend a school where they are administered an examination, parents may request that one of the following assessments be administered to their child, fulfilling the requirement in lieu of the portfolio. Optional assessments include a standards assessment, a high school assessment, a college readiness assessment, an assessment of students in grade 3 to measure reading grade level or a nationally norm references assessment. By completing any one of these assessments the requirement would be fulfilled, and the portfolio would be waived.

