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ACKNOWLEDGEMENTS

Thank you for your time and hard work in developing this Scholarship Manager Handbook

2021-2022
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INTRODUCTION

Arizona has 5 educational choice scholarship programs. 1. Original Individual Income Tax Credit 2. Switcher Individual Income Tax Credit 3. Low Income Corporate Income Tax Credit 4. Disabled/Displaced Corporate Income Tax Credit 5. Empowerment Scholarship Account (ESA). These scholarship programs allow families to obtain a quality Catholic education for their children. The purpose and goal of this handbook is to assist in understanding how these programs work. The Diocese of Tucson Catholic Schools depend and count on these scholarship programs every year. In 2020, 86% of our K-12 students received Tax Credits and ESA’s totaling more than $32 million dollars. As you can see, these scholarship programs are essential to the existence and to the future of our Catholic Schools.

HISTORY OF ARIZONA STATE TAX CREDIT SCHOLARSHIPS (DONORS)

The original individual income tax credit for donations to private school tuition organizations (STOs) was passed by the Arizona legislature and became law in January 1998. The low-income corporate income tax credit for donations to STOs became law in September 2006. The disabled/displaced corporate income tax credit became law in August 2009. The switcher individual income tax credit for donations to STOs became law in January 2012.

1. Original Individual Income Tax Credit
   Also referred to as Original, Individual, FNB: Financial Need Based
   The amount of the original individual income tax credit is indexed annually, based on the growth in the Metropolitan Phoenix CPI and therefore can change every tax year. If the CPI decreases, the credit amount is not to be indexed downward.

2. Switcher Individual Income Tax Credit
   Also referred to as Switcher, Plus, Overflow
   The amount of the switcher individual income tax credit is indexed annually, based on the growth in the Metropolitan Phoenix CPI and therefore can change every tax year. If the CPI decreases, the credit amount is not to be indexed downward.
3. Low-Income Corporate Income Tax Credit
   Also referred to as Corporate/Low Income
   The corporate STO credits are available only to corporate taxpayers, exempt organizations with unrelated business income, corporate partners of a partnership (if passed through by a partnership), or an S corporation (may be passed through to their individual shareholders).

4. Disabled/Displaced Corporate Income Tax Credit
   Also referred to as Disabled/Displaced or D/D
   The disabled/displaced tax credit donation limitation remains constant from year to year. Credit cap increase to 6 Million.

FOUR TYPES OF TAX CREDIT SCHOLARSHIPS EXPLAINED (RECIPIENTS)

Scholarship qualification varies per student. One child may be eligible for a certain type of scholarship while a sibling may be eligible for a different type within the same household. Students enrolled in Arizona private schools may be eligible for 1, 2, 3, or all 4 types. There are four types of tax credit scholarships, STOs refer to them by different names:

1. Original, Individual, FNB (Financial Need Based)
2. Switcher, Plus, Overflow
3. Corporate/Low Income
4. Disabled/Displaced or D/D

The following are guidelines to determine which category each student falls into:

1. ORIGINAL INDIVIDUAL INCOME TAX CREDIT
   Also referred to as Original, Individual, FNB: Financial Need Based
   • Student must be enrolled in a private school K-12.
   • Student will need to apply annually to receive a scholarship.
   • No income limits by law however some STOs may award by financial need base.

Note: If you do not apply, you will not receive anything! No application, No award.

Scholarship Guidelines
• K-12 students
• Preschool students with disabilities
• STO cannot award scholarship solely based on donor recommendations
• STO shall consider financial need when awarding scholarships
• No scholarship cap
Scholarship Prerequisites

- A preschool student with disabilities must have an MET or IEP from an Arizona public school. A 504 plan does not meet this requirement.

2. SWITCHER INDIVIDUAL INCOME TAX CREDIT

Also referred to as Switcher, Plus, Overflow

- Student has transferred from a public school to a private school in the current year. Attended a public school for 90 days of the prior school year and transferred to a qualified private school (Kinder-12th grade).
- Student enrolls in a qualified private school Kindergarten program.
- Received a switcher scholarship in a prior year and the child continued to attend a private school in subsequent years.
- Received a scholarship from a Corporate Low-Income program, issued by an Arizona STO, and had uninterrupted continual enrollment in a private school.

Scholarship Guidelines

- K-12 students
- Preschool students with disabilities
- Priority given to students and siblings of students on the STO’s waitlist
- STO shall consider financial need when awarding scholarships
- No scholarship cap

Scholarship Prerequisites

Scholarship applicants must meet ONE of the following prerequisites

- Student attended an Arizona public school as a full-time student for at least 90 days of the prior fiscal year and then transferred from the public school to a private school.
- Student is enrolling or currently enrolled in a private school kindergarten.
- Student is enrolling or currently enrolled in a private preschool program for students with disabilities. Preschool students must have an MET or IEP from an Arizona public school. A 504 plan does not meet this requirement.
- Student is a dependent of a member of the armed forces of the United States who is stationed in Arizona pursuant to military orders. Preschool students must also have an MET or IEP from an Arizona public school (a 504 plan does not meet this requirement).
- Student was homeschooled before enrolling in a private school.
- Student moved to this state from out of state before enrolling in a private school.
- Student participated in an Arizona Empowerment Scholarship Account (ESA) and did not renew the account or accept the ESA scholarship in order to accept a Switcher scholarship. Participated means the student received ESA funds from the ESA program.
• Student received a Switcher individual scholarship under one of the above criteria in a prior year and the child continued to attend a private school in subsequent years.
• Student received a Low-Income corporate scholarship or a Disabled/Displaced corporate scholarship in a prior year and the child continued to attend a private school in subsequent years.

Note: If student only received an Individual scholarship last year and no prior Corporate or Switcher scholarship, the student will not be able to qualify for a Switcher scholarship the current year.

3. LOW-INCOME CORPORATE INCOME TAX CREDIT

Also referred to as Corporate/Low Income
• Income MUST be below the income cap (185%-342% Poverty Level of free/reduced lunch federal guidelines). Check each STO for their own income table.
• And a student must have received at least one tax credit scholarship (Individual, Switcher, Corporate, or D/D) in the past year.
• Or student transfers from an Arizona Public School in the past school year or they move from out of state or they transferred off an ESA scholarship.

Scholarship Guidelines
• K-12 students
• Preschool students with disabilities
• Student’s family income cannot exceed 185% of the income required to qualify a child for reduced price lunches.

Scholarship Prerequisites

Scholarship applicant’s family income cannot exceed 185% of the income required to qualify a child for reduced price lunches AND must meet ONE of the following prerequisites:
• Student attended an Arizona public school as a full-time student for at least 90 days of the prior fiscal year or one full semester and then transferred from the public school to a private school. Those students who transfer to a qualified school after the first full semester are eligible to receive a scholarship that same academic year.
• Student is enrolling or currently enrolled in a private school kindergarten.
• Student is enrolling or currently enrolled in a private preschool program for students with disabilities. Preschool students must have an MET or IEP from an Arizona public school. A 504 plan does not meet this requirement.
• Student is a dependent of a member of the armed forces of the United States who is stationed in Arizona pursuant to military orders. Preschool students must also have an MET or IEP from an Arizona public school (a 504 plan does not meet this requirement).
• Student was homeschooled before enrolling in a private school.
• Student moved to this state from out of state before enrolling in a private school.
• Student participated in an Arizona Empowerment Scholarship Account (ESA) and did not renew
  the account or accept the ESA scholarship in order to accept a Low-Income scholarship. Participated means
  the student received ESA funds from the ESA program.
• Student received a Low-Income corporate scholarship under one of the above criteria in a prior
  year and the child continued to attend a private school in subsequent years.
• Student received an Original individual scholarship or a Switcher individual scholarship in a prior
  year and the child continued to attend a private school in subsequent years.

4. DISABLED/DISPLACED CORPORATE INCOME TAX CREDIT

Also referred to as Disabled/Displaced or D/D
• Student has an IEP, MET, or 504 plan.
• Or student has gone through the Arizona Foster System at any point in their life. (social security #
  required).
• There is no income cap, but parent must report income to the STO.

Scholarship Guidelines
• K-12 students
• Preschool students with disabilities
• The SUM of a student’s DD scholarships is limited to 90% of state aid or cost of tuition, whichever
  is less.

Scholarship Prerequisites

Scholarship applicants must meet ONE of the following prerequisites:

• Student is in Preschool or Grades K-12 and has a MET or IEP from an Arizona public school.
• Student is in Grade K-12 and has a 504 plan from an Arizona public school. Does not apply to
  Preschool students.
• Student is in Grade K-12 and was placed at one time in the Arizona foster care system (will be
  verified with the Arizona Department of Child Safety). Does not apply to Preschool students.

Note: The above information is subject to change. The most recent version can be determined by the
date on the information posted to the Arizona Department of Revenue website, www.azdor.gov

1 Arizona Department of Revenue, Office of Economic Research & Analysis, “Manual for School Tuition Organizations”, 9-26-2021
PRESCHOOL REQUIREMENTS

The following requirements must be met for a preschool applicant to qualify for a scholarship.

- The applying student must be at least 3 years old.
- The applying student has a disability as defined in A.R.S. § 43-1601 as a student who has a hearing impairment, a visual impairment, a development delay, a preschool severe delay, or a speech/language impairment.
- The parents will provide documentation of the child’s disability in the form of IEP or MET issued by the public school district.
- The applying student’s tuition to the private school is NOT PAID in part or full by a public school.
- The applicant is not currently receiving Empowerment Scholarship Account (ESA) funding from the Arizona Department of Education. Funding from the ESA program is on a quarterly basis and begins in the quarter following acceptance to the program. Once ESA funding begins, any outstanding STO scholarship money must be refunded by the private school to the STO.

ARIZONA EMPOWERMENT SCHOLARSHIP ACCOUNTS (ESA)
EMPOWERMENT SCHOLARSHIP ACCOUNT (ESA) ALSO REFERRED TO AS EMPOWERMENT SAVINGS ACCOUNTS 2

Arizona was the first state to enact an education savings account program, the newest school choice mechanism. The passage and launch of the Empowerment Scholarship Accounts program in 2011 opened the door to new learning opportunities for students with special needs and circumstances. As of April 2021, the ESA program serves approximately 9800 students throughout the state. While the program is always evolving, the core mission is to facilitate ESA families in customizing an education that works for each individual student. This program allows ESA families to seek an array of alternative educational services ranging from private school to home-based education. The mission of the Arizona Department of Education (ADE or the Department) is to serve all ESA families effectively and efficiently, and ESA staff will provide guidance and support to help families navigate the program.

Even though the ESA program was launched in 2011, the program is relatively new compared to other educational institutions in Arizona, and as such, information is subject to change. Administrative Law Rules created by the State Board of Education (SBE) limit substantive changes to the handbook no more frequently than every three years. However, policies can and will be added and/or redacted in response to newly enacted legislation, court decisions, and/or suggestions for best practices, which may result in more frequent updates to the handbook. The Department will notify ESA families of any changes. See Handbook Updates section on page 3. https://www.azed.gov/esa/parent-handbook
What is an Empowerment Scholarship Account?

- An Empowerment Scholarship Account is an account established to provide an education for qualified students. The program’s main purpose is to provide options for parents to freely choose within the law on how and where to educate their children with financial assistance from the state.
- It is an account administered by the Arizona Department of Education (ADE).
- It is funded fully by state tax dollars to provide options for the education of qualified students in Arizona.
- 90% of the student’s State aide that would have gone to a student’s school district or charter school is allocated to the applicant parent of the qualified student to provide an education. In other words, students are awarded 90% of the funding they would be receiving at a public school.
- The ESA program allows parents of qualified students to utilize public monies to purchase educational services from private schools, education providers, and or vendors. Funds may also be utilized for educational therapies, online school, private tutoring, etc.
- By choosing to opt out of the public-school system, this program allows parents to seek an array of alternative educational services from private school to home-based education and control their child’s educational needs.
- While a student is under an ESA contract, the Account Holder (applicant parent) agrees not to receive any State Tuition Organization (STO) or tax credit scholarships concurrently with an ESA. In other words, with an ESA you cannot stack or receive money from an STO.

Potential money a student can receive for ESA depends on each individual’s situation. Students in Kinder receive 50% of the advertised tuition and students in 1st-12th grade could receive $6,300 to $7,200 or over $20,000 if in the autism spectrum. Any funds left on student accounts can be used for college.

ESA Eligibility Requirements

There are specific requirements for all eligibility types

- Preschool student with a disability
- K-12 student with disability
- Student with a parent who is active-duty military
- Student with a parent who was killed in the line of duty
- Student with a parent who is legally blind, deaf, or hard of hearing
- The student attends a D or F rated school [A-F Letter Grades | Arizona State Board of Education](az.gov)
- The student resides within a Native American Reservation
- The student is a sibling of a current or previous recipient
- The student was a ward of court
- The student was a previous ESA recipient
NOTE: The ESA eligibility requirements page is updated regularly to provide the most current requirements reflecting legislative and administrative changes and updates. Prior to applying visit https://www.azed.gov/esa/eligibility-requirements to make sure all documents and information meet these requirements for ease of applying.

Parent Requirements

- Parents would submit an application through the ESA portal at https://www.azed.gov/esa. The application process helps determine initial eligibility by asking a series of questions at the start of the application process.
- Once approved, parents will receive an electronic contract from ESA. Parents must sign a contract electronically and return it to ESA.
- Contracts are between parents and ESA - private schools are simply a vendor where parents can use funds to pay for private tuition.
- Parent must sign an agreement to:
  - Not enroll student in a public/charter school.
  - Release the school district from all obligations to educate the child.
  - Not accept a scholarship under the Arizona tax credit program for the same time period.
  - Use the money deposited in the ESA for purposes specified in the law and spend accumulated ESA dollars on basic education subjects.

ESA Benefits

- Empowers parents to customize their child’s education.
- Provides public funding for personalized learning.
- Covers a wide range of education expenses.
- Simple, straightforward application process
- Students with special needs may start as early as Pre-K.

Funding and Tuition payments

- ESA deposits funds into the student’s account quarterly (see below dates).
- Parent must create an account with ClassWallet through the ESA portal to pay vendors including private schools.
- ClassWallet charges a processing fee which is paid by parents and should be included in the invoice (see below).
  - The processing fee is 2.5%. Please note that the processing fee applies to the entire payment total, including fees added to cover processing fees. If you are adding a fee to cover processing to your payment invoice, a fee of 2.5641% would make the settlement amount fee neutral.
Example:
$1,000.00 invoice amount
2.5641% = $25.64
Total invoice amount = $1,025.64
2.5% of $1,025.64 = $1,000.00 settlement amount (paid to school)

- Every quarter, the school must provide a detailed invoice for parents to upload to ClassWallet and pay school via direct deposit. Invoice must include:
  - Student’s name
  - Name of private school
  - Transaction date
  - Tuition or type of fees charged
  - Total amount to be paid
  - ClassWallet fee

- Parents with multiple children receiving ESA will be able to access all students accounts under the same ClassWallet account.
- Schools must be registered with ClassWallet to receive payments. Contact ESA directly if your school is not yet registered for instructions.

ClassWallet Instructions for Tuition Payments

Once parents receive an invoice from the school and save it to their computer, they would follow the following steps:

1. Visit this website https://www.azed.gov/esa/portal
2. Click on Existing Users Click Here
3. Enter your username and password
4. Click on blue icon Go To ClassWallet Account
5. Click on Pay Vendor (right side)
6. Type the school’s name, select school, click next
7. Enter total invoice amount and click next
8. Click browse and search for your invoice and click next
9. Select AZ ESA and click next
10. Select Private School Related Expenses and click next
11. You will receive a message your report has been Submitted
12. Complete the same process for each student if necessary

Receiving ClassWallet Payments

- School representative will receive an email notification for each ClassWallet deposit including the student’s name and tuition amount.
- School can also access the ClassWallet vendor portal at https://vendor.classwallet.com/login# to view payments processed.
- Tuition payments will be made via direct deposit.
Application and Funding Dates

Parents only submit an application in the first year and receive subsequent renewal contracts annually. Application deadlines vary. Refer to the following table for 2021-22 application deadline and funding dates.

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Quarter Dates</th>
<th>Application Deadline</th>
<th>Contract Deadline</th>
<th>Funding Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>July 1 - September 30</td>
<td>May 1</td>
<td>September 30</td>
<td>July 1 - September 30</td>
</tr>
<tr>
<td>Q2</td>
<td>October 1 - December 31</td>
<td>August 1</td>
<td>December 31</td>
<td>October 1 - December 31</td>
</tr>
<tr>
<td>Q3</td>
<td>January 1 - March 31</td>
<td>November 1</td>
<td>March 31</td>
<td>January 1 - March 31</td>
</tr>
<tr>
<td>Q4</td>
<td>April 1 - June 30</td>
<td>February 1</td>
<td>June 30</td>
<td>April 1 - June 30</td>
</tr>
</tbody>
</table>

Helpful Tips

- Ask questions during new family interviews to help determine eligibility for ESA.
- Educate parents on ESA and tax credit options available. Encourage them to visit ESA website for more information.
- ESA would not allow students to receive both tax credit and ESA scholarships for the same time period (quarter) but a student may qualify for tax credit for quarter 1 and subsequently be approved for ESA and receive funding for quarters 2-4 in a given year (school would need to refund tax credit scholarship to STO for quarters 2-4).
- Kindergarten ESAs are typically in the $3,200.00 range. Work with parents to determine if they are able to pay the remaining tuition balance as ESA funding would increase for future years covering the majority if not all of their tuition.
- Visit the ESA website to stay up to date with ESA changes/updates.
- Follow up with parents each quarter to ensure payment processing through ClassWallet is complete.
- ESA used to process all payments via a debit card program where funds would be deposited into a debit card account and parents would pay the school directly. A few parents may still be utilizing that program and waiting to be transitioned to ClassWallet.

2
Arizona Department of Education, “Parent Handbook Empowerment Scholarship Account Program School Year 2021-2022”, 4-5-21
**RECORD KEEPING**

- Set up a spreadsheet for students and what scholarships they qualify for.
- Track scholarships on an annual Scholarship Tracking Spreadsheet.
- Maintain a scholarship file for each STO per year to keep important information.
- Maintain accurate records of scholarships per student.
- Note AAA application dates for students to be prepared for renewal year.

**STUDENT VISAS**

- Student Visas are issued to students who are born in a country other than the United States. Most of the students that request Visas are from Mexico especially if your school is close to the border. The school must seek certification through an immigration program and the process to get certification can take from 6 months to a year. The cost for a school to apply is between $2,300-$2,500. Once the school is approved, the school receives a manual with instructions on how to complete Visa forms for students. The student may get enrolled in a school but may not attend in person until the Visa is approved.
- All STOs work with Visa students only if the student is living in the US and the guardian/s have student as a dependent (on their taxes), and if the student is not commuting across the border to reside in Mexico.
- The parent must provide a physical address from their country since that will be entered on the system. The form the school must complete for student is called F-1 also known as I-20. The parent must take this form to the consulate office of their country to make an appointment to start the Visa process. The process may take between 4-12 weeks and once the student is approved for a Visa, the student may get approved for 1 to 5 years.
- Students with Visas that live in Mexico may commute and cross the border every school day.
- Students with Visas that come from other countries, example, Canada, China; can live in the United States for their Visa term.
- SEVIS Webpage: [https://egov.ice.gov/sevis](https://egov.ice.gov/sevis)
**SAMPLE INCOME TABLE**

- Refer to STO’s website for Income Table Guidelines, they change every year.
- The family must meet the following income guidelines based on household size and income.

**Federal Low-Income Guidelines for 2020-2021**

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Income Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$59,004</td>
</tr>
<tr>
<td>3</td>
<td>$74,337</td>
</tr>
<tr>
<td>4</td>
<td>$89,670</td>
</tr>
<tr>
<td>5</td>
<td>$105,002</td>
</tr>
<tr>
<td>6</td>
<td>$120,335</td>
</tr>
<tr>
<td>7</td>
<td>$135,668</td>
</tr>
<tr>
<td>8</td>
<td>$151,001</td>
</tr>
</tbody>
</table>
**WHICH SCHOLARSHIPS TO APPLY FOR AND WHEN**

**Catholic Tuition Support Organization (CTSO)** - Encourage all families to apply to FAIR to determine scholarship eligibility. CTSO offers all four types of scholarships, **D/D has a separate application.** Start Applying December 1st, ($19 for the short form and $24 for the long form) [www.fairapp.com](http://www.fairapp.com) *(schoolcode:800, password: ctso800, once in the application select school code that corresponds to your school. www.ctso-tucson.org (520)-838-2558.*

**AAA Scholarship Foundation** - This is a “Corporate” donation STO they will offer the maximum, if eligible, of $5,500 (2021-2022 for K-8th) and $7,500 (2021-2022 for 9th-12th) per year, but you cannot accept any other STO scholarship at the same time. This scholarship may not cover the full tuition amount at your school and the parent may find it more beneficial to transfer to other types of STOs, especially in high school. [www.aaascholarships.org](http://www.aaascholarships.org) *(888)707-2465.*


**Arizona Leadership Foundation (ALF)** - Known by many as the Geico one! Applications open mid-April. The application is offered online. ALF has strict guidelines and has a deadline every year of June 15th. They only offer Corporate and D/D types. **ALF has a separate application for D/D.** [www.arizonaleader.org](http://www.arizonaleader.org) *(602)-525-7355.*


**Arizona School Choice Trust (ASCT)** - Opens the application process early on January 15th each year for the fall semester through TADS. ($30 fee) Apply right away; they are a First Come-First Serve STO! (THEY GIVE PRIORITY TO THOSE ALREADY IN THEIR SYSTEM) [www.asct.org](http://www.asct.org) *(623)-414-3429.*

**Arizona Tax Credit (AZTXCR)** - They work like ATC and IBE, in that they accept student recommended donations. [www.azxcr.org](http://www.azxcr.org) *(480)-939-2151.*

**Arizona Tuition Connection (ATC)** - This organization deals mostly with donor-based designations, like IBE and AZTXCR. They do a great job of assisting you in finding donors. They offer all four types of awards and applications open at the end of May. Apply and learn about their donor program at [www.arizonatuitionconnection.com](http://www.arizonatuitionconnection.com) *(480)-409-4106.*

**AZ4EDUCATION (AZ4ED)** - This STO offers all 4 award types. [www.az4education.org](http://www.az4education.org) *(480) 478-0624.*

**Brophy Community Foundation** - These awards are primarily Corporate scholarships. There are 2 deadline dates with two different fees. February 1st - April 14th $17.50; After April 14th : $35.00. [www.brophy.org/apply](http://www.brophy.org/apply) *(602)-264-5291* (They use FACTS grant and aid division for applications).
Catholic Education Arizona (CEA) - [www.catholiceducationarizona.org](http://www.catholiceducationarizona.org) (602) 218-6542.

Institute for Better Education (IBE) - This fund is available to all students, all 4 types of scholarships are available. *D/D has a separate application*. They have a Donor Recommendation Program. Family and friends can recommend your student as recipient of their tax credit donation. The law only allows a recommendation and not a guarantee of their donation to these students. They usually have two rounds of general funds, and they help with emergency funds at the end of the year. [www.IBEscholarships.org](http://www.IBEscholarships.org) (520)-512-5438.

Pappas Kids Schoolhouse Foundation - Usually Corporate and Individual. They offer back packs and some fees awards based upon GPA eligibility and these are for very low-income families. [www.pappaskidssf.org](http://www.pappaskidssf.org) (602) 441-5707.

School Choice Arizona (SCA) - This STO offers 3 of the 4 types. Applications open all year and expire May 31st, of the school year. They pay monthly and no D/D scholarships. [www.schoolchoicearizona.org](http://www.schoolchoicearizona.org) (480)-722-7502.

STAY (School Tuition Association of Yuma) - Opens their applications on March 1st and closes it on February 28th of the same school year. It offers all 4 types of scholarships [www.azstay.org](http://www.azstay.org) (928)782-5786.

STO4KIDZ - Applications open April 15, offering all 4 types of scholarships. [www.sto4kidz.org](http://www.sto4kidz.org) (602)698-8855.

Students First Foundation - They will start taking applications May 1, 2021. They will offer all 4 types of scholarships. [www.studentswin.org](http://www.studentswin.org) (480)-787-9314.

TOPS for Kids (TOPS) - This STO offers all 4 award types. Applications start May 1st. [www.topsforkids.com](http://www.topsforkids.com) (480)-414-8677.

YesFundforKids (Yuma’s Education Scholarship) - Application opens mid-March and closes on December 31st. They offer all 4 types of scholarships. [www.yesfundforkids.org](http://www.yesfundforkids.org) (928)314-0033.

**ESAs Scholarship is NOT an STO:** ESA (Empowerment Scholarship Award) is a different state program for military families, disabled/displaced eligible students, or a student coming from a D or F grade public school. If a parent accepts ESA for their child/ren, the student(s) will not be eligible to receive any other STO scholarship. Parents work with the scholarship manager to decide the best option whether ESA or STOs. [www.azed.gov/esa](http://www.azed.gov/esa) (602)542-5393 or toll-free (800)352-4558.

**NOTE:** For more Arizona School Tuition Organizations certified to receive donations for Individual Income Tax Credit and Corporate Income Tax Credit visit the Arizona Department of Revenue under Resources: [https://azdor.gov/tax-credits/certification-school-tuition-organizations](https://azdor.gov/tax-credits/certification-school-tuition-organizations)
HELPFUL INFORMATION FOR FAMILIES

Documentation families will need to be eligible to apply:

• Parents must provide proof of income, example: Income Taxes, Social Security Income, Food Stamps Income, Check Stubs, Child Support Income.
• Public school representative must complete Previous Attendance Verification Form from public school for each STO organization if child is transferring from a public school.
• Scholarship Managers or parents must provide proof of Previous Award Verification to STOs if student is a returning private school student in the state of Arizona.
• Parent must provide a copy of IEP, MET or 504 plan if applying for a Disabled/Displaced Scholarship to both ESA and STOs.
• Parent must provide proof of physical address if required by STO (utility bill, mortgage letter), especially if student is not on tax return. (Ex. Parents divorced and claim student alternate years, or ESA).

Families can help themselves by finding donors to recommend their students with tax-credit donations and which STOs takes those recommendations, etc.

• Some STOs (except ESA) can take recommendations, but by law, cannot guarantee a designation.

Many taxpayers do not know the difference between a Credit and a Deduction. Here are some helpful points.

• A Credit reduces taxes owed dollar-for-dollar while a deduction reduces taxable income. Taxable income is used to determine the taxes owed. In effect, the benefit of a deduction depends on the tax bracket of the donor. The benefit of a Deduction ranges from 0% to 5% of the donation. The benefit of a Credit is 100%.

How do I know if I owe Arizona Taxes?

• Look at Line 40 of Arizona Tax Form 140. If that number is greater than 0, you pay Arizona Income Tax.

What does Arizona Tax Liability mean?

• In simple words, if you owe income taxes to Arizona, you have an Arizona Tax Liability.
WORKING WITH FAMILIES

- Encourage parents to keep a scholarship folder to keep all award letters/application information to access year after year.
- Educate parents on the different types of scholarships.
- Some parents will need more assistance than others in completing applications.
- Provide parents with a scholarship guide detailing all information paying particular attention to deadlines.
- Send periodic reminders via email/phone call/social media of scholarship windows, open dates/deadlines, etc.
- Schedule appointments to complete applications for parents that need help completing applications.
- Encourage parents to apply for as many scholarships as possible and to not exclude themselves if they meet initial income qualifications.

Preparing Families for Private High School Scholarships

- Educate parents on the types of scholarships their student has received prior years.
- Provide a prior Scholarship Verification Form for family to provide to future high school (need to implement).
- Increase tax credit education for parents to be better prepared prior to high school years.
- Parent should discuss with a high school scholarship manager before transferring off an ESA.
- Parents can start finding donors early if they plan to transfer off ESA. Have them set up an account with CTSO or IBE RF account, so they can have others donate early so that the first year off ESA they have Individual funds ready.

Working with PK families

- Schedule tax credit meetings with PreK families.
- Conduct interview with each parent to understand their scholarship eligibility.
- Continue to follow up to ensure applications are submitted on time.
- Families can start soliciting tax credits during PreK for Kindergarten year.
- STO can hold tax-credit funds for up to 2 years after the year of donation for a student to be ready to receive it.
- The sooner families solicit funds for their child's education the better. Most people will continue to recommend your student for their tax credit donation however, the law only allows a recommendation and cannot guarantee a designation.
SCHOLARSHIP TIMELINE

The following is what a typical year for a scholarship manager may look like - what happens when?

Spring
- Enrolling families, meeting incoming families.
- Setting up your scholarship spreadsheet for the new year.
- Qualifying your students on what scholarship they are eligible for, schedule one-on-one meetings as necessary.
- Educating your families to know what they should apply for and when.
- Confirming families have applied to all STOs needed – track student applications biweekly by visiting STO portals.
- Follow up with families on incomplete applications.
- Updating Scholarship Guide for the following school year.
- Schedule tax credit seminars with IBE, CTSo, etc.
- In the Spring STOs will contact you for the completion of the school agreements for the new school year.

Summer
- Reviewing the STO lists of your students that have applied.
  - Confirming Enrollment and Tuition balance to be able to receive awards.
  - Updating spreadsheets as awards are accepted.
- Determining who will need what type of scholarship and from where you may be able to help them get it.
- Create family financial contracts – formal or informal.
- Communicate tuition responsibility to the person in charge of tuition management to initiate payment plans i.e., FACTS.

Fall
- Handling the Financial records as payments are received.
- Adjusting payment plans as needed.
- Helping those families that will need more scholarships.
  - Teaching them how to find potential donors.
  - Working with STOs to see what additional funds may be available for a 2nd round.

Winter
- Finalizing current year agreements.
- Preparing for new incoming students.
- Updating website with scholarship open enrollment dates, etc.
- Round 2 award verifications with STOs.
EXCEPTIONS AND UNIQUE SITUATIONS

Sample Scenarios

Parent does not have a social security number to apply for scholarships.
- Parent can apply using their ITIN number provided by the IRS. It is the number individuals utilize to file taxes if they do not have a social security number.

Parent is paid via cash/personal checks thus no W2s or pay stubs and no taxes are filed.
- CTSO: Parent would complete an Income Verification Form in lieu of taxes (if needed depending on income level).
- IBE: Parent would complete the IBE Self-employed income verification form.
- Brophy: Parent would select the “does not file” box on the application.
- ALF: Parent would submit income documentation for any income he/she receives plus a letter of explanation.

Parent does not claim student on income taxes for a particular year.
- CTSO: Parent could complete an Income Verification Form in lieu of taxes (if needed depending on income level)
- IBE: IBE requires paystubs for income verification not tax returns.
- ALF: Parent would complete a Student Not Listed as Dependent on Guardian’s Taxes Form
- Brophy: Parent would submit their income taxes and provide a letter of explanation of circumstances.

Parent does not file taxes due to income level and receiving government assistance such as Section 8, food stamps, assistance.
- CTSO: Parent can complete the Income Verification Form in lieu of taxes (if needed depending on income level)
- ALF: Parent can submit income documentation for any assistance he/she receives
- Brophy: Parent would select the “does not file” box on the application.
- IBE: Parent would complete the Self-employed Income Verification Form and submit a letter of explanation as well.

Student attended a school in Mexico the prior school year – what scholarship would he qualify for?
- Parent would apply for CTSO and IBE as the student would only qualify for Individual funds.
- Parent can solicit tax credit donations from friends and family and ask them to designate their child or school as the recipient. Keep in mind that the law only allows a recommendation and not a guarantee of the donation to students.
- New law allows eligibility for Plus and Corporate scholarships.

High School student received tax credit contributions at IBE but was told they only qualify for the individual funds, not switcher. High School complete the Previous Scholarship Verification Form based on the records they have.
• Complete the Previous Scholarship Verification Form for student based on elementary/middle school scholarship information.
• Email the form to IBE directly specifying that you are completing the form in addition to the form submitted by the high school as they can confirm continuous enrollment.

**Student is the son/daughter of a school’s principal and/or assistant principal – can they get AAA?**

• Student cannot receive AAA per one of their guidelines:
  “I certify that no parent/guardian of a student on this application is an owner, operator, principal, or person with equivalent decision-making authority of an eligible private school or not at the school which my student will attend.”

**Student is transferring from another Catholic School within the Diocese, does the scholarship follow the student?**

• The application follows the student, STO must be notified of change in school.
• The award does not follow the student as awards are given based on school – some exceptions exist if the school has returned the funds to the STO instead of reallocating the award (with STO permission) to a different student with need.
  o One parent household
  o Parent has no verifiable income source
  o Parent with custody doesn’t file taxes or claim student this year
  o Parent doesn’t file taxes
  o Etc.

**GENERAL TIPS WHEN WORKING WITH STOs**

• Introduce yourself as the new scholarship manager by email and follow up with a phone call as soon as you can after being hired.
• Maintain an open line of communication during the school year.
• Send them a thank you card and/or Christmas card from the school.
• Always ask questions when you have doubts, they appreciate your questions and are always willing to help.
• Invite them to conduct tax credit trainings at your school and Open Houses.
• Utilize the refund forms that each STO supplies for processing refunds.
SPECIFIC STO TIPS

ALF

- Schools do not have access to application database to see what parents have applied for ALF. Send an email to an ALF representative to ask for a current list of applicants. Recommended to do it every week to two weeks once the application window opens.
- ALF is flexible in reallocating funds approved to students with higher need. In late July ALF sends a list of approved students to the scholarship manager. Send an email to Richard Kirsch with names of students that may not need ALF funds due to AAA/ESA approvals and ask for approval to increase award for other students.
- ALF makes one scholarship payment to the school at the beginning of the school year.
- ALF also offers D/D scholarships

CTSO

- CTSO allows schools to choose their own deadline as well as payment schedule which best fits the school budget’s needs.
- CTSO sends periodic lists of students with Referral Program (RP) funds available. Send an email to CTSO if you need information on RP funds throughout the year.
- CTSO will post spreadsheets on FAIR with recommended amounts for Switcher, Individual and Corporate eligibility after your application window is closed. CTSO is flexible and allows the school to increase/decrease awards based on need and other STO approvals.
- CTSO offers D/D scholarships. Parents must complete a separate application found on the CTSO website to apply for D/D funds.
- CTSO has two rounds and makes scholarship payments to the school twice a year plus an emergency round in April for families facing financial hardships.
- Typically, families cannot receive Emergency Funding two years in a row for the same hardship.

IBE

- IBE’s portal is very user friendly, and they are consistent on opening their portal for allocations every 1st of the month.
- IBE will open a Nominal tab in March/April allowing scholarship managers to allocate a nominal award to kindergarten students and students transferring from public school to ensure future Switcher eligibility (if needed).
- IBE has many video tutorials on their website to help parents understand tax credits and how to solicit contributions.
- IBE offers D/D scholarships – same application.
- IBE makes monthly payments to school – (RF) when funds are available and accepted by the school.
- IBE usually has 2-3 general scholarship award rounds as well.
Brophy

- Brophy has two application windows, for maximum consideration parents should meet the first deadline.
- Brophy now does student verifications and award confirmation of enrollment and eligibility online through FACTS Grant and Aid.
- Brophy sends two award letters to the school after awarding. One copy is for parent records, the second copy is to be retained by the school.
- Brophy makes one full scholarship payment at the beginning of the school year. (Sometimes they have a second round in late October).

ASCT

- In recent years ASCT typically only funds prior ASCT recipients and siblings.
- ASCT makes 2 scholarship payments to the school during the year – they are not consistent on dates.
- *Alert High School when an 8th grader is on ASCT so that we can ensure they receive this scholarship in 9th grade. Must keep each year to be considered for the following year.

AAA

- AAA’s application is the most comprehensive and detailed application.
- Having the school review AAA applications prior to submitting to AAA is a best practice to avoid mistakes.
- AAA approves applications on a first come/first serve basis – encourage families to apply early.
- It is recommended for the school to keep track of what year a family applies for AAA to know when it is time to reapply. Parents normally do not remember when the three years expire.
- AAA sends quarterly attendance/financial status reports for the school to complete. School does not have to wait until the quarterly report to involve AAA in delinquent accounts/excessive absences.
- AAA makes payment four times a year to schools.
- Advise parents that (Parent A) left side of application column is who AAA will require to endorse the quarterly checks. Make sure that person can get to the school during school hours to sign. AAA does not allow schools to send the check home for a parent to sign there.
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<thead>
<tr>
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<th>CONTACT PERSON</th>
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<tr>
<td>Catholic Tuition Support Organization (CTSO)</td>
<td>Gracie Quiroz Marum</td>
<td><a href="mailto:gqmarum@diocesetucson.org">gqmarum@diocesetucson.org</a></td>
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<td>AAA Scholarship Foundation</td>
<td>Amber Botamer</td>
<td><a href="mailto:amber@aaascholarships.org">amber@aaascholarships.org</a></td>
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<td>Chad Bays</td>
<td><a href="mailto:info@academicopportunity.org">info@academicopportunity.org</a></td>
<td><a href="http://www.academicopportunity.org">www.academicopportunity.org</a></td>
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<td>Arizona Leadership Foundation (ALF)</td>
<td>Aaron Muth, Ariana Muth</td>
<td><a href="mailto:Info@arizonaleader.org">Info@arizonaleader.org</a>, <a href="mailto:amuth@arizonaleader.org">amuth@arizonaleader.org</a></td>
<td><a href="http://www.arizonaleader.org">www.arizonaleader.org</a></td>
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<tr>
<td>AZ Private Education Scholarship Fund, Inc (APESF)</td>
<td>Robin Anderson</td>
<td><a href="mailto:robin@apesf.org">robin@apesf.org</a>, <a href="mailto:helpdesk@apesf.org">helpdesk@apesf.org</a></td>
<td><a href="http://www.apesf.org">www.apesf.org</a></td>
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<tr>
<td>AZ4Education (AZ4ED)</td>
<td>Brian Sanders</td>
<td><a href="mailto:brian.sanders@az4education.org">brian.sanders@az4education.org</a>, <a href="mailto:helpdesk@az4education.org">helpdesk@az4education.org</a></td>
<td><a href="http://www.az4education.org">www.az4education.org</a></td>
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<td>Arizona School Choice Trust (ASCT)</td>
<td>Elizabeth Dreckman “Liz”</td>
<td><a href="mailto:ldreckman@asct.org">ldreckman@asct.org</a></td>
<td><a href="http://WWW.ASCT.ORG">WWW.ASCT.ORG</a></td>
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<td>AZ Education &amp; Scholarship Opportunity Program (AESOP)</td>
<td><a href="mailto:info@aesopkids.org">info@aesopkids.org</a></td>
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<td>Arizona Tax Credit (AzTxCr)</td>
<td>Janet Oitzman &amp; Robyn Brown</td>
<td><a href="mailto:info@aztxcr.org">info@aztxcr.org</a></td>
<td><a href="http://www.aztxcr.org">www.aztxcr.org</a></td>
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<td>Arizona Tuition Connection (ATC)</td>
<td>Tim Kuhn</td>
<td><a href="mailto:tim@arizonatuitionconnection.com">tim@arizonatuitionconnection.com</a></td>
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<td>Brophy Community Foundation</td>
<td>Heather Chapman</td>
<td><a href="mailto:hchapman@brophyprep.org">hchapman@brophyprep.org</a></td>
<td><a href="http://www.brophyfoundation.org">www.brophyfoundation.org</a></td>
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<td>Catholic Education Arizona (CEA)</td>
<td>Nancy Padberg</td>
<td><a href="mailto:npadberg@ceaz.org">npadberg@ceaz.org</a>, <a href="mailto:info@ceaz.org">info@ceaz.org</a></td>
<td><a href="http://www.catholiceducationarizona.org">www.catholiceducationarizona.org</a></td>
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<tr>
<td>Institute for Better Education (IBE)</td>
<td>Kim Kirschner</td>
<td><a href="mailto:kim@ibescholarships.org">kim@ibescholarships.org</a></td>
<td><a href="http://www.ibescholarships.org">www.ibescholarships.org</a></td>
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<td>Pappas Kids Scholarship Foundation</td>
<td>Dayna Sandoval</td>
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<td>Amber Ronan</td>
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<td>School Tuition Association of Yuma, Inc. (STAY)</td>
<td>Rex Pope</td>
<td><a href="mailto:stay@azstay.org">stay@azstay.org</a>, <a href="mailto:rexpope@azstay.org">rexpope@azstay.org</a></td>
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<td>Harry Miller</td>
<td><a href="mailto:Services@topsforkids.com">Services@topsforkids.com</a></td>
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HELPFUL WEBSITES

Arizona Department of Revenue

- Arizona Department of Revenue
  https://azdor.gov/

- School Tuition Organization Manual

- For Arizona School Tuition Organizations certified to receive donations for Individual Income Tax Credit and Corporate Income Tax Credit visit the Arizona Department of Revenue under Resources:
  https://azdor.gov/tax-credits/certification-school-tuition-organizations

Empowerment Scholarship Account ESA Program

- Empowerment Scholarship Account Program
  https://www.azed.gov/esa
  Telephone: (602)364-1969
  Email: esa@azed.gov

- Empowerment Scholarship Account ESA Program Parent Handbook
  https://www.azed.gov/esa/parent-handbook

- Empowerment Scholarship Account ESA Program Eligibility Requirements & Application
  https://www.azed.gov/esa/eligibility-requirements

- A-F Letter Grades for Public Schools
  A-F Letter Grades | Arizona State Board of Education (az.gov)

ClassWallet

- ClassWallet banking system for the management of ESA accounts
  www.classwallet.com
  Telephone: 1-877-969-5536
  Email: help@classwallet.com

- ClassWallet vendor portal to view payments processed
  https://vendor.classwallet.com/login#
Student Exchange Visitor Information System SEVIS (Student Visas)

- SEVIS
  [Student and Exchange Visitor Program | ICE](https://egov.ice.gov/sevis)
  Help Desk: 1-800-892-4829
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<td>Lori Soehl</td>
<td><a href="mailto:Loris@stcyril.com">Loris@stcyril.com</a></td>
</tr>
<tr>
<td>St. Elizabeth Ann Seton, Tucson</td>
<td>Nadia Cronin</td>
<td><a href="mailto:nchronin@school.seastucson.org">nchronin@school.seastucson.org</a></td>
</tr>
<tr>
<td>St. Francis of Assisi, Yuma</td>
<td>Veronica Lopez</td>
<td><a href="mailto:vlopez@diocesetucson.org">vlopez@diocesetucson.org</a></td>
</tr>
<tr>
<td>St. John the Evangelist, Tucson</td>
<td>Claudia Chavez</td>
<td><a href="mailto:cchavez@stjohnhigh.org">cchavez@stjohnhigh.org</a></td>
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<tr>
<td>St. Joseph, Tucson</td>
<td>Claudia Teran</td>
<td><a href="mailto:cteran@stjosephhigh.org">cteran@stjosephhigh.org</a></td>
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<td>Sts. Peter &amp; Paul, Tucson</td>
<td>Linda Suida</td>
<td><a href="mailto:lsuida@sspptucson.org">lsuida@sspptucson.org</a></td>
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<td>James Lemas</td>
<td><a href="mailto:jlemas@diocesetucson.org">jlemas@diocesetucson.org</a></td>
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<tr>
<td>Yuma Catholic HS, Yuma</td>
<td>Jennifer Domingos</td>
<td><a href="mailto:jdomingos@yumacatholic.org">jdomingos@yumacatholic.org</a></td>
</tr>
<tr>
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<td>Email</td>
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<tr>
<td>Sheri Dahl</td>
<td>Superintendent</td>
<td><a href="mailto:sdahl@diocesetucson.org">sdahl@diocesetucson.org</a></td>
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<td>Angelina Schmidt</td>
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<td><a href="mailto:aschmidt@diocesetucson.org">aschmidt@diocesetucson.org</a></td>
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<tr>
<td>Lupita Sandoval</td>
<td>School Operations Manager</td>
<td><a href="mailto:lsandoval@diocesetucson.org">lsandoval@diocesetucson.org</a></td>
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SAMPLE ASK LETTER

Sample letters can be beneficial for parents when asking friends, family, and businesses for donations. Sample letters can be found in the STO's websites. Below is a sample letter from an STO:

SOME PERSON
123 Any Street
Yuma, AZ 85364

Dear So & So:
As you may know, our son John is attending Local Yuma Private School. Local Yuma is a private school which qualifies to receive tuition payments made possible by contributions made in accordance with the Arizona Private School Tax Credit to a School Tuition Organization such as STAY. In essence, AZ taxpayers can donate to STAY and reduce their AZ tax liability dollar for dollar. In effect, the taxpayer is pre-paying part of their AZ income taxes by contributing to STAY. For example, if you made a $500 donation to STAY and your AZ tax refund was going to be $400, it will generally now be $900 because the $500 dollar donation was a tax credit not a deduction. You must have an AZ tax liability for the program to help you as a taxpayer, but many of us have a liability and do not realize it. The real beauty of this program is that you can recommend a specific student to receive the benefit of your contribution. If you recommended John, it could reduce his tuition by as much as 90% of your donation.
It is through the generosity and understanding of people like you that enable us to put our son in a private school. I know that this investment will pay dividends for years to come. ****************DESCRIBE HOW THIS EDUCATION MAKES A DIFFERENCE TO YOUR CHILD******************.
Enclosed you will find a STAY brochure. We hope you feel moved to contribute so that our son can continue to be nurtured in a healthy environment. If you have any questions, please give us a call at home or call STAY at (928) 782-5786.

Sincerely,
YOUR NAME
(***) ***-****
Dear Friends and Family,

We are excited to share with you that _____ (name of student) ____ will be attending _____ (School) _____ in the fall. We have chosen _____ (School) _____ because we believe _______ (your reason for choosing school here) ___________.

Did you know that you can be a part of helping us achieve this goal of sending _____ (name of student) ____ to _____ (School) _____? If you owe income taxes to the state of Arizona, then you can chose to redirect that money and take a dollar-for-dollar state tax credit, recommending _____ (name of student) _____. Arizona Private Education Scholarship Fund will then take your tax credit and award tuition scholarships. Below is some more information on how the tax credit works. There is also a short video on the APESF website that explains the program in a clear, comprehensive way. You can view that video here.

What's a tax credit? A donation that reduces what you owe in Arizona State taxes. This can be up to $2,269 (filing married) or $1,135 (filing single) for 2019 tax year and $2,365 (filing married) or $1,183 (filing single) for the 2020 tax year.

Why are we telling you about it? Because you can recommend a student when you make a private school tax credit donation, and we’d love it if you’d recommend ours!

So, what do you need to know?

• If you will pay Arizona income tax (or have been paying it throughout the year), you are eligible to be a donor. See examples.

• Your private school tax credit donation is eligible for a dollar-for-dollar Arizona state tax credit.

• You can determine your previous state tax liability by reviewing Line 47 on Arizona Form 140.

• Ninety percent or more of your donation goes directly to tuition scholarships.

• The Private School Tax Credit Program does not take money away from public schools.

• Tax forms you or your accountant will complete when filing (301, 323 and possibly 348) can be found here. Need a tax preparer that can help? See APESF’s list.

• You can take multiple State tax credits in one year. Find out more here.

Ready to participate? Give online with your credit card, or download a form to be sent with your check. There will be a place for your recommendation on either form.

Thanks, in advance, for your support!

Sincerely,

NOTICE A school tuition organization cannot award, restrict or reserve scholarships solely on the basis of a donor’s recommendation. A taxpayer may not claim a tax credit if the taxpayer agrees to swap donations with another taxpayer to benefit either taxpayer’s own dependent.
**SAMPLE SCHOLARSHIP TRACKING SPREADSHEET**

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<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Grade</th>
<th>In FACTS for Brophy</th>
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<th>EDA</th>
<th>Tuition Billed</th>
<th>Parish Discount</th>
<th>Sibling Discount</th>
<th>Employee Discount</th>
<th>Total Billed</th>
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<th>ALF Did</th>
<th>CTSO Did</th>
<th>IBE Did</th>
<th>CTSO Rd 1 (STC)</th>
<th>CTSO Rd 1 (ITC)</th>
<th>Brophy Rd</th>
<th>ALF Rd 1</th>
<th>APESF</th>
<th>Round 1 B E Ind</th>
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</tr>
</tbody>
</table>

**Note:** For spreadsheet tutorial contact Lupita Sandoval, lsandoval@diocesetucson.org
Immaculate Conception School
501 S. Avenue B
Yuma, Arizona 85364  (928) 783-5225
Email: gadiaz@diocesetucson.org (Grisell Diaz - Principal)
cnieves@diocesetucson.org (Claudia Nieves - Tuition Coordinator)

Sample Tuition Guide for Families

Date
Applied

___ FAIR (CTSO) – Catholic Tuition Support Organization (www.fairapp.com)
IC School Code: 800 IC School Password: ctso800 – OPEN 2/8/2021 and AVAILABLE ONLINE
1st Round Deadline for 2021-2022 Application is May 17, 2021 - Awards in August 2021
2nd Round Deadline for 2021-2022 Application is January 1, 2022-Awards in March 2022
Contact Fair for questions: customerservice@fairtuition.com
Notes/Passwords:

___ YES - Yes Fund for Kids (www.yesfundforkids.org) Contact #: (928)314-0033
Application AVAILABLE ONLY ONLINE and can be submitted to YES starting March 1, 2021
Notes/Passwords:

___ STAY - School Tuition Association of Yuma, Inc. (www.azstay.org) Contact #: (928)782-5786
Application AVAILABLE ONLY ONLINE – and can be submitted to STAY starting March 1, 2021.
Notes/Passwords:

___ ALF - Arizona Leadership Foundation (www.arizonaleader.org) Contact #: (602)525-7355
Application for the 2021-2022 school year will be AVAILABLE ONLY ONLINE – Application opens on April 15, 2021 and closes June 15, 2021.
Notes/Passwords:

___ IBE - Institute for Better Education (www.ibescholarships.org) Contact #: (520)512-5438
Application is AVAILABLE ONLY ONLINE – Open February 1, 2021 and deadline to submit application is June 1, 2021.
Notes/Passwords:

Tuition Cost:
K-8 $5,800.00
PreK Full-Time $5,150.00
PreK Part-Time $4,150.00

PLEASE CHECK THE WEBSITES FOR APPLICATION DEADLINES!
Arizona Tax Credit (www.aztxcr.org) Contact #: (480)939-2151
Application will be AVAILABLE ONLY ONLINE starting March 16, 2021.
Notes/Passwords:

STO4Kidz (www.sto4kidz.org) Contact #: (602)698-8855
Application will be AVAILABLE ONLY ONLINE starting May 1, 2021-July 1, 2021.
Notes/Passwords:

Arizona Tuition Connection (www.arizonatuitionconnection.com) Contact #: (480)409-4106
Application for 2021-2022 will be AVAILABLE ONLY ONLINE after May 15, 2021.
Notes/Passwords:

Tops for Kids (www.TOPSforKids.com) Contact #: (480)414-8677
Application for the 2021-2022 school year will be AVAILABLE ONLY ONLINE May 1, 2021.
Notes/Passwords:

AAA Scholarship Foundation (www.aaascholarships.org) Contact #: 1-888-707-2465
Application for the 2021-2022 school year will be mailed to fully renewing students in February 2021. Applications will be open to the public ONLY ONLINE in mid-March 2021.
Notes/Passwords:

ESA Empowerment Scholarship Account by the Arizona Department of Education (www.azed.gov/esa)
ESA is now accepting applications for the 2021-2022 School Year, AVAILABLE ONLY ONLINE. The deadline to apply for Quarter 1 funding is May 1st, 2021.
Notes/Passwords:
Important Scholarship Tips:

✓ Please include all paperwork/documents with the applications when you submit them. The organizations are not responsible for letting you know if you are missing paperwork, therefore your application may not be processed if missing documents.

✓ Make sure you have a copy of the award letter/e-mails (or STO Award Verification Form for each organization) that you received during the 2020-2021 school year. You must submit a copy of this information with your 2021-2022 school year applications. Organizations either email parents or send a letter by US mail of the STO award notifications.

✓ Make sure to save all award letters (STO Award Letters) that you receive for the 2021-2022 school year from any organization, you will be asked to submit and include them with the applications for the following school year (2022-2023).

What do most applications require?:

- Application Form (Sometimes one application is required to be completed for each child)
- Proof of Income-(Copy of Income Taxes 2020)
- Copy of STO Letters (Award Verification Letters from Previous Year)
- Other documents (Public School Verification Form-If student is transferring from a public school to IC)

Please send all required forms to the organizations with your applications, if you are missing STO Letters or tax documents the applications will not be processed.

Receiving an email or letter confirmation indicating that your application has been processed and/or completed by an organization does not mean that such organization is required or will award money to your child. All organizations relay on DONATIONS FROM THE COMMUNITY AND CORPORATIONS TO BE ABLE TO FUND CHILDREN!

KEEP IN TOUCH WITH THE SCHOLARSHIP ORGANIZATIONS TO CHECK THE STATUS OF YOUR APPLICATIONS.

PLEASE CALL MRS. CLAUDIA AT (928)783-5225 TO SCHEDULE AN APPOINTMENT IF YOU NEED HELP WITH THE APPLICATION PROCESS.
Preschool-Registration Requirements

Documents/Fees Information:
- Birth Certificate
- Baptismal Certificate
- Immunization Record
- $200.00 Registration Fee per child
- $10.00-$12.00 Uniform Shirts for PE Days
- $350.00 Fundraising Fees (2 required fundraisers for the school year)
- 20 Parent Service Hours (required to be worked by parents)

PreK Tuition Cost:
- $5,150.00 ($515.00 Per Month) Full-Time
- $4,150.00 ($415.00 Per Month) Half-Time

Kinder — 8th Grade- Registration Requirements

Documents/Fees Information:
- Birth Certificate
- Baptismal Certificate, First Communion Certificate, Confirmation Certificate (if applicable)
- Immunization Record
- Copy of Last Report Card
- $100.00 Registration Processing Fee per child
- $3.10 Daily Cost for Lunch/$1.60 Daily Cost for Breakfast
- $10.00-$12.00 Uniform Shirts for PE Days
- $350.00 Fundraising Fees (2 required fundraisers for the school year)
- 20 Parent Service Hours (required to be worked by parents)

K-8th Tuition Rates for 2021-2022 School Year:
- **Tuition Cost:** $5,800.00 per child ($580.00 per month)

TUITION ASSISTANCE IS AVAILABLE FOR FAMILIES - Kinder-8th Grade.
School Tuition Support Organizations (STOs) offer tuition assistance in addition to what Immaculate Heart is able to provide. Please contact the following preferred STOs directly for information about their program requirements and application process. For maximum consideration, please note the STOs application open dates for the 2019-2020 school year. You may apply and receive assistance from multiple STOs, in many cases.

- **Catholic Tuition Support Organization (CTSO)**
  Applications open January 1st until May 18th (SCHOOL CODE: 800  PASSWORD: ctso800) (520) 838-2558 [www.ctso-tucson.org](http://www.ctso-tucson.org)

- **AAA Scholarship Foundation (AAA)**
  Applications open March 22nd until April 12th (888) 707-2465 [www.aaascholarships.org](http://www.aaascholarships.org)

- **Arizona Community Foundation (ACF)**
  Applications open Late Spring (602) 381-1400 [www.azfoundation.org](http://www.azfoundation.org)

- **Arizona Leadership Foundation (ALF)**
  Applications open April 15th- June 15th (602) 525-7355 [www.arizonaleader.org](http://www.arizonaleader.org)

- **Arizona Private Education Scholarship Fund (APESF)**
  Applications open March 1, no deadline, scholarships awarded monthly (480) 699-8911 [www.apesf.org](http://www.apesf.org)

- **Arizona School Choice Trust (ASCT)**
  Applications open early January 15 until April 30 (623) 414-3429 [www.asct.org](http://www.asct.org) (select Oro Valley on application)

- **Arizona Tuition Connection (ATC)**
  Applications open May 15th – no deadlines (480) 409-4106 [www.arizonatuitionconnection.com](http://www.arizonatuitionconnection.com)

- **Empowerment Scholarship Account (ESA)**

- **Institute for Better Education (IBE)**
  Applications open January through March 31st (520) 512-5438 [www.ibescholarships.org](http://www.ibescholarships.org)

- **School Choice Arizona (SCA)**
  Applications open March 1st through mid-May 15 (480) 722-7502 [www.schoolchoicearizona.org](http://www.schoolchoicearizona.org)

- **Tuition Organization for Private Schools (TOPS)**
  Applications open May 1st, no deadline listed (480) 414-8677 [www.topsforkids.com](http://www.topsforkids.com)

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*Felicia Gonzales (IHS Scholarship Director) at scholarships@ihschool.org 520-297-6672*
For more information, please contact:

Mr. Jose Luis Arvizu
Scholarship Manager
Telephone: (520) 747-1027
E-mail: Jarvizu@omosschool.com

There are many resources of financial assistance available to our families. The criterion for each STO varies from source to source. These are the most frequently used sources at Our Mother of Sorrows Catholic School.

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**Catholic Tuition Support Organization (CTSO) (FAIR)**
Telephone: (520) 838-2558
Web: [www.fairapp.com](http://www.fairapp.com)  School code 800 & Password cts0800
Application Fee: $24  (Original, Corporate, and Plus are all on one application)
Opens:
01/22/2019 – 05/17/2019 for First round
05/19/2019 – 01/17/2020 for second round

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**Institute for Better Education (IBE)**
Telephone: (520) 512-5438
Web: [www.ibescholarships.org](http://www.ibescholarships.org)
Application Fee: No Fee (Original, Corporate, and Plus all one application)
Opens: March 15 – May 1, 2019 for first round
Opens: May 1- August 15, 2019 for second round
Arizona Leadership Foundation (ALF)
Telephone: (520) 433-0209
Web: www.arizonaleader.org
Application Fee: No Fee (Low Income Corporate - D/D)
Opens: 4/08/2019
Ends: 6/15/2019

Arizona School Choice Trust (ASCT) (TADS)
Telephone: (623) 414-3429
Web: http://www.asct.org
Application Fee: $30
Opens: January 15th, 2019
Ends: April 30th, 2019
Important: Once ASCT reaches 2,000 applicants, they will go to an interest list only

Arizona Tax Credit (ATC)
Telephone: (480) 939-2151
Web: www.aztxcr.org
Application Fee: No Fee
Opens: March 16, 2019 (Still open for 2018-19 till March 1st)

Pappas Kids Scholarship Foundation (Pappas)
Telephone: (602) 441-5707
Web: www.pappaskidssf.org
Application Fee: No Fee
Opens: Feb 1, 2019
Ends: May 15, 2019

Arizona Education & Scholarship Opportunity Program (AESOP)
Telephone: (480) 315-8263
Web: www.aesopkids.org
Application Fee: No Fee
Opens: TBD
Ends: TBD
Academic Opportunity of Arizona (AOA)
Telephone: (480) 378-6650
Web: info@academicopportunity.org
Application Fee: No Fee
Opens: May 1, 2019
Ends: TBD

TOPS for Kids (TOPS)
Telephone: (480) 414-TOPS (8677)
Web: www.topsforkids.com
Application Fee: No Fee
Opens: May 1, 2019
Ends: TBD

AAA Scholarship Foundation (AAA)
Telephone: (888) 707-2465
Web: www.aaascholarships.org
Online Application Fee: $30 - Paper Application $35
Opens: 3/21/2019
Ends: 5/3/2019
Apply only if qualify for 100% award! Talk to Scholarship Manager

Department of Education Empowerment Scholarship (ESA)
Telephone: (602) 364-1969
Web: www.azed.gov/esa
Application Fee: No Fee
Opens: February 1, 2019
Special Criteria must be met. Talk to Scholarship Manager

Lastly, please also consider making a Tax Credit Donation. If you have not already done so, please make your 2018 State Tax Credit Donation by April 15, 2019 to CTSO for Our Mother of Sorrows Catholic School. Together, we can make a difference in providing a quality education for all students!

If you have any questions, please do not hesitate to contact us at the School Office, 747-1027 or email to info@omosschool.com or Jarvizu@omosschool.com
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<th>STO SCHOOL TUITION ORGANIZATION</th>
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<td>Tops for Kids</td>
<td>TOPS</td>
<td><a href="http://www.topsforkids.com">www.topsforkids.com</a></td>
<td>TCPS</td>
<td>FREE</td>
<td>5/1/2023</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Empowerment Scholarship Account</td>
<td>ESA</td>
<td><a href="http://www.azed.gov/esa">www.azed.gov/esa</a></td>
<td>Arzona Department of Education</td>
<td>FREE</td>
<td>Year Round</td>
<td>Year Round</td>
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</tbody>
</table>

** ESA Eligibility requirements must be met, please see Mrs. Tejeda, Scholarship Director, or Mrs. Gamas, Business Manager, for additional information

** Updates will be communicated via email
Financial Aid Independent Review.......................................................Catholic Tuition Support Organization

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<th>User Name:</th>
<th>Password:</th>
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The application period begins January 1, 2019, for maximum consideration; please apply no later than January 22, 2019.

Incoming students will need to forward a copy of their 2017 tax return as well as final 2017 paystubs to FAIR. Existing students must have their 2017 tax return on file (or submit if a first time applicant) and submit their final 2017 paystubs. In addition, applications received after January 22 will need to provide 2018 tax returns.


After Applying to FAIR, consider applying to the following organizations that allow Private School Tuition Tax Credits and donations to be recommended to schools and/or to recommend students. The Department of Revenue requires prospective recipients to complete an application prior to the release of funds for tuition assistance.

### Arizona Leadership Foundation (ALF) [www.arizonaleader.org](http://www.arizonaleader.org) 928-231-2122

Applications open April 15–June 15, 2019

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<th>User Name:</th>
<th>Password:</th>
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### Institute For Better Education [www.ibescholarships.org](http://www.ibescholarships.org) 520-512-5438

Application opens February 1

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<th>User Name:</th>
<th>Password:</th>
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### Arizona School Choice Trust (ASCT) [www.asct.org](http://www.asct.org) 623-414-3429

Applications open February 1–April 30, 2019

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<th>User Name:</th>
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### Arizona Community Foundation [www.azfoundation.org](http://www.azfoundation.org) 602-381-4100

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### AAA Scholarship Foundation [www.aaascholarships.org](http://www.aaascholarships.org) 888-707-2465

Application opens

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<th>User Name:</th>
<th>Password:</th>
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### Tuition Organization for Private Schools for Kids (TOPS) [www.topsforkids.com](http://www.topsforkids.com) 480-414-8677

Applications open May 1

<table>
<thead>
<tr>
<th>User Name:</th>
<th>Password:</th>
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Financial aid and tax credit funds may be available to your student regardless of your income. For more information, please contact Lori Soehl at 520-881-4240 or loris@stcyril.com.
2020-2021 TUITION ASSISTANCE GUIDE

All SEAS K-8th students qualify for tuition support through the Arizona Tax Credit Program regardless of the family’s income. However, Pre-K students with disabilities, MET, or IEP will also qualify for tuition support. New families who apply to three (3) Scholarship Tuition Organizations (STO) (CTSO and two other STOs) and provide proof by June 30, 2020, will receive -$200 off tuition per student.

TAX CREDIT & CORPORATE SCHOLARSHIPS

All SEAS students qualify regardless of income

Catholic Tuition Support Organization (CTSO)
520-838-2558 | www.CTSO-Tucson.org
Financial Aid Independent Review (FAIR) is the organization to contact when applying for CTSO scholarships: www.fairapp.com
School code: 800 Password: cts0800
Please use your individual “fee waiver” code to by-pass the application fee.
Application: Now open
☐ Applied on: _______ User Name:___________ Password:__________

Arizona Tuition Connection (ATC)
480-409-4106 | www.arizonatuitionconnection.com
Application: Open May 17th
☐ Applied on: _______ User Name:___________ Password:__________

Arizona Tax Credit (AzTxCr)
480-939-2151 | www.aztxcr.org
Application: Open March 16th
☐ Applied on: _______ User Name:___________ Password:__________

Institute for Better Education (IBE)
520-512-5438 | www.ibescholarships.org
Application: Open January 15th
☐ Applied on: _______ User Name:___________ Password:__________

Tuition Organization for Private Schools (TOPS)
480-414-8677 | www.topsforkids.org
Application: Open May 1st
☐ Applied on: _______ User Name:___________ Password:__________

School Choice Arizona, Inc. (SCA)
480-722-7502 | www.schoolchoicearizona.org
Application: Open March 1st
☐ Applied on: _______ User Name:___________ Password:__________

CORPORATE SCHOLARSHIPS ONLY

Family must meet income requirement

Arizona Leadership Foundation (ALF)
602-525-7355 | www.arizonaleader.org
Application: Open April 15th
☐ Applied on: _______ User Name:___________ Password:__________

Academic Achievement Accessible Scholarship Foundation (AAA)
888-707-2465 | www.aaascholarships.org
*if a student accepts AAA they may NOT accept an award from another STO
Application: Open mid-March
☐ Applied on: _______ User Name:___________ Password:__________

ARIZONA DEPARTMENT OF EDUCATION SCHOLARSHIP

Specific criteria must be met to qualify for this program

Empowerment Scholarship
Account Program (ESA)
602-364-1969 | esa@azed.gov/esa
*if a student accepts ESA they may NOT accept an award from another STO
Application: Now open
☐ Applied on: _______ User Name:___________ Password:__________

For more information or to schedule an appointment, please contact Lynn Randall, Registrar/Scholarship Director at lrandall@school.seastucson.org or at 520-219-7650.