



## Career Scholarship Accounts

Department of Education | Commission for Higher Education | Treasurer of State

### PARENT STUDENT AGREEMENT EMANCIPATED STUDENT AGREEMENT

#### INTRODUCTION

The Career Scholarship Account (CSA) program is administered by the Treasurer of State (TOS) in coordination with the Commission for Higher Education (Commission) and the Department of Education (IDOE).

Parents of eligible students or emancipated students who participate in a CSA program offered by an approved CSA provider may use scholarship money towards eligible expenses directly related to the student's CSA program.

A student will be eligible if they meet specific eligibility requirements at the time of application. Scholarship funds are deposited into an eligible student's parent or emancipated student CSA account through a secure online portal four times per year. TOS uses a financial management vendor to disburse payments to CSA providers for eligible expenses provided to CSA students.

*Note: a debit card or direct reimbursement(s) to a parent/emancipated student are not allowed with the CSA program.*

What follows must be completed for a parent of an eligible student or emancipated student to participate in the CSA program. For additional information on the CSA program review the information provided on the Treasurer of State's CSA [website](#).

#### ASSURANCES

As a condition of the CSA program, the parent ("Parent") of an Eligible Student, or the Emancipated Eligible Student ("EES") makes the following assurances:

**1. Authority to Act.**

I confirm I am the:

- a. Parent of the student named at the end of this agreement with the authority and capacity to act on behalf of the student, or
- b. Emancipated student as defined by IC 20-26-11-4, named at the end of this agreement, with the authority and capacity to enter into this agreement.

**2. Declarations; Eligibility.**

- a. I confirm the information provided in this agreement is true and accurate. Any misrepresentation could result in termination of the student's enrollment in the CSA program.
- b. I agree to follow the terms and policies of the CSA program.
- c. I declare that the individual named at the end of this agreement is an eligible student, and meets the following eligibility requirements: (IC 20-51.4-2-1.5)
  - i. Has legal settlement in Indiana;
  - ii. Is at least five (5) years of age and less than twenty-two (22) years of age on the date in the school year specified in IC 20-33-2-7; and
  - iii. Is enrolled in grade 10, 11, or 12 in Indiana.



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- d. An eligible student must be enrolled in a joint Career and Technical Education (CTE) program, modern youth apprenticeship, registered apprenticeship or Indiana College Core (ICC) program by an approved CSA participating entity in accordance with IC Chap. 20-51.4-5.5.
  - i. An eligible student program must have a work-based learning apprenticeship, internship, or experience of 75 hours or more, as required by IDOE.
- e. An eligible CSA student may only receive a grant amount for a sequence, course, apprenticeship, or program of study that aligns with the career scholarship student's graduation plan.

### 3. Student Test Number.

Parent/EES understands that an Eligible Student must obtain a student test number (STN) through the Indiana Department of Education as described in IC 20-19-3-9.4 to participate in the CSA program. TOS and/or IDOE will assist with this process. (IC 20-51.4-4-1(h))

### 4. Qualified Expenses.

- a. Parent/EES agrees that a grant deposited in the eligible student's account and any interest that may accrue in the account will be used only for the eligible student's qualified expenses as defined by IC 20-51.4-2-3.8 at a CSA approved participating entity as defined by IC 20-51.4-2-3.2. The TOS may request a refund for any funds used beyond those described under qualified expenses. (IC 20-51.4-2-3.8)
- b. Parent/EES will use the CSA grant fund for their student to enroll in and attend sequences, courses, apprenticeships, or programs of study designated and approved under IC 20-51.4-4.5-6, including:
  - i. Career coaching and navigation services,
  - ii. Postsecondary education and training,
  - iii. Certification and credentialing examinations.
  - iv. Equipment
  - v. Transportation and costs related to obtaining a driver's license:
    - Transportation
      1. Parent/EES may use up to \$625 of the CSA annual grant amount for transportation expenses IF the student's CSA provider matches the transportation expense AND the student must prove hardship.
    - Driver's license
      2. Parent/EES may use up to \$1,000 of the CSA annual grant amount received for costs related to obtaining a driver's license. A driver's license must be a requirement of the CSA participating entity program AND the student must prove hardship.
    - vi. Any other expenses approved by the treasurer of the state under IC 20-51.4-4.5
- c. Any other expenses approved by the treasurer of the state under IC 20-51.4-4.5Parent/EES agrees that purchases cannot be made with personal funds to then receive reimbursement from a CSA account. (IC 20-51.4-4.5-10)
- d. Parent/EES agrees CSA expenses must be related to their student's program of study to be qualified expense from a CSA account.
- e. Parent/EES is responsible for the payment of any tuition or required fees for a sequence, course, apprenticeship, or program of study that is not paid from the CSA grant fund. (IC 20-51.4-4.5-9)

### 5. Single Account; Single School Year.

- a. Parent/EES understands to enter into a separate agreement for each child of the Parent or for each EES and that no more than one account can be established for each eligible student.



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- b. Parent/EES understand that I must establish a CSA account for a school year no later than 30 days after the date that the TOS approves an application. (IC 20-51.4-4.5-1(d))
- c. Parent/EES understands and agrees that this agreement is valid for one (1) school year while the Eligible Student is in 10<sup>th</sup>, 11<sup>th</sup> 12<sup>th</sup> grades and may be renewed annually (IC 20-51.4-4.5-1(e))
- d. Parent/EES may roll over for use in a subsequent year with a maximum of one thousand dollars (\$1,000). For each year thereafter, the Parent/EES may roll over one thousand dollars (\$1,000) plus any amount rolled over in a previous year. (IC 20-51.4-4.5-3(c))
- e. If the Eligible Student participates in the Indiana Education Scholarship Account (INESA) and enters into a CSA written agreement with the TOS for the CSA program, the Eligible Student must participate in the CSA program using the student's INESA account instead of establishing a CSA account. However, if the student ceases to participate in the ESA program, the parent of the student or the emancipated student must establish a CSA account to participate in the CSA program. (IC 20-51.4-4.5-1(f)(2))
- f. Parent/EES will participate in the annual satisfaction survey.

### 6. Tax Treatment.

- a. Parent/EES agrees that any distribution made to an CSA account or money in the account may not be treated as income or a resource for purposes of qualifying for any other federal or state grant or program administered by the state or a political subdivision. (IC 20-51.4-4-12)
- b. Parent/EES understands and agrees that a distribution made to an eligible student's CSA fund is considered tax exempt if the distribution is used for a Qualified Expense. (IC 20-51.4-4.5-12)

### 7. Termination.

- a. Parent/EES agrees that this agreement is terminated automatically for an eligible student if:
  - i. The Eligible Student no longer resides in Indiana while the eligible student is eligible to receive grants under section 2 of this chapter; or
  - ii. The account is not renewed within three hundred ninety-five (395) days after the date the account was either established or last renewed. Parent/EES is not entitled to any remaining money once an account terminates, and any new accounts opened will begin with no balance. (IC 20-51.4-4.5-1(be)(2))
  - iii. Upon graduation or receiving a certificate of completion under the career scholarship student's individualized education program or an Indiana high school equivalency diploma. (IC 20-51.4-4.5-1(e)(1) & (2))
- b. Parent/EES agrees that an agreement made for an eligible student while the eligible student is in grades 10, 11, 12 may be terminated before the end of the school year if the Parent/EES student notifies the TOS by email to [CSA@tos.in.gov](mailto:CSA@tos.in.gov) with the following process.

Information required to discontinuing participation in the CSA program:

- Email TOS: [CSA@tos.in.gov](mailto:CSA@tos.in.gov)
- Subject line: Close account - CSA
- Student name, reason for discontinuing participation in the CSA program, and any feedback of the CSA program.

*Phone calls will not be accepted as notice to discontinue participation in the CSA program.*

- c. Parent/EES agrees that money in the account when the account is terminated is reverted to the state general fund.