



2017-2018 FUNDING POLICY and Receipt Submission Requirements – Updated.

WISDOM has set basic receipt submission expectations of our families. This policy is in effect from September 1, 2017, and adheres to Alberta Education's 2017 Standards for Home Education Reimbursements.

- 1) **The receipts being submitted should reflect a balanced education.** It is preferable not to reimburse very large receipts, unless there is evidence of other resources being used. Long-term families with many resources that they are re-using for younger children may have larger receipts reimbursed. You may send a note of explanation along with a large receipt to help our process.
- 2) **We require that receipts be sorted, numbered, and itemized on an Expense Form,** with corresponding dates and totals for books and non-book items filled into the form, and "B" written on the receipt beside books claimed. **Foreign currency** receipts must have exchange rate documentation or cannot be accepted. A copy of your VISA or PayPal statement should be sent with the receipt to show exchange rate. As we cross-reference receipts with education program plans (EPPs), **if a purchase is unique to one child**, it is helpful to note that on the receipt so we know which EPP to check.
- 3) **Receipts must be original.** We **can not** accept copies or emailed receipts at this time. We do recommend that you photocopy receipts before sending them to us, for your own record and in case original receipts are lost in transit.
- 4) The Expense Form must be **signed and dated**, and receipts must be sent any time before the final **May 31 submission deadline**. ****Additional deadlines for payment occur throughout the year.** Receipts submitted by Sept 30 will be reimbursed on Nov 15, Jan 31 reimbursed Mar 15 (for those who did not use their entire first half of funding), submitted Mar 30 for reimbursement May 15, and May 31 for reimbursement July 15. Receipts may be sent in at any point during the year to apply to the next available payment date, but those sent after the last business day in May will apply to the following school year. *Remember that funding is available by halves – half in October and half in May.*
- 5) ****Be sure we have your EFT form.** Reimbursements are made as electronic funds transfers (EFTs). We require an EFT form and void cheque to process your payment. Failure to send us your EFT form will delay your refund.
- 6) We require that receipts **itemize items purchased** and **contain complete vendor information**. Non-itemized receipts cannot be accepted. If an item is not readily identifiable as a book or non-book item, please write details on the receipt. (Note: blank notebooks/planners/journals are not considered books.)
- 7) **If not all items on the receipt are being claimed**, the items not being claimed must be crossed off.
- 8) Please note that any **shipping, exchange, or tax** incurred in purchasing materials is part of the cost of the items, and can therefore be submitted for reimbursement.
- 9) Receipts are to reimburse parents for consumable and non-consumable resources **that correspond to their Education Program Plan** for their child. Ensure your EPP is up to date. WISDOM requires that EPPs are approved by the facilitator.
- 10) **Receipts must be for educational supplies or services corresponding to the following list.** If the item falls in a "grey area" the parent must attach a note indicating the specific way the resource contributes to the plan.
- 11) **Receipts not adhering to this policy will not be reimbursed.** You may appeal our decision in writing, if you believe something should be claimable that was not accepted. We will not return receipts unless requested.
- 12) **Receipts expire two years** from the date of purchase, which helps keep current reimbursements reflecting the current plan. Unclaimed and expired receipts may be returned to you, if you wish. Resources affected by annual changes to AB Ed's Standards for Home Education Reimbursement will be limited to current-year funding.
- 13) Please remember to send a **Carry-Over Letter** to finance@trinitychristian.ca (or fax to 780-741-2204, or mail to our Derwent office) **before June 30th**, to carry unclaimed funds the following school year. A deadline is a requirement of Alberta Education, and is the only way funds may be carried over. Letters may be mailed, faxed or emailed. Even if you believe you have sent sufficient receipts on file to use all funding, please consider sending a carry-over request as a precaution.
- 14) **Purchase Orders** may be used for approved purchases, where funding is available to be claimed. See more on our website under Resources > Funding.

Consistent with the Home Education Regulation and clearly reflected in your Home Education Program Plan, **we will reimburse parents who provide us with original receipts for:**

- ❖ learning resources related to the home education program, including:
 - textbooks, workbooks
 - consumables such as paper, pens, notebooks, etc
 - resource books, extra reading books
 - learning aids/manipulatives
 - Audio/Video
 - instructional DVDs
 - instructional audio CDs
 - documentaries and other identifiably educational DVDs
 - technology – one per family per year unless approved based on your letter justifying need
 - desktop or laptop computer hardware (including upgrades)
 - printer and ink
 - educational software
 - tablet
 - e-reader
 - monitor, DVD player etc up to \$200
 - science equipment and supplies
 - materials needed to construct projects that are clearly part of the learning program as indicated on the EPP (eg. play-dough, clay, glue, building blocks, fabric, science projects, craft supplies, etc.)
- correspondence courses and online learning programs
- internet service, 50% September 1 to Aug 30 **with specific monthly receipt**
- ❖ educational extras/“tangible assets”

Note: tangible assets’ combined cost may be up to 50% of your yearly funding.

 - musical instruments
 - one sewing machine, camera, telescope, tools, clearly reflected in EPP
 - physical education equipment
- ❖ admissions/fitness/field trips (passes & memberships) **Note: student cost only up to a maximum of 50% of annual funding.** Family passes allowed, and we will reimburse student portion.
 - zoo admission
 - museum/science centre
 - theatre tickets related to literature study
 - federal park pass
 - cultural events
 - fitness centre passes and classes
- admission fees to conferences **only if the conference is a listed resource in the Education Program Plan**
- ❖ home school management
 - planners
 - photocopying costs
 - organizational bins or totes (ie Workboxing materials)
- ❖ Lessons or classes

Note: up to a maximum of 50% of annual funding may be used for lessons. Lessons considered on a per-year basis.

 - group classes : group swimming classes, art classes, music classes, dance classes, language classes, etc
 - individual private lessons
 - tutoring necessary for student’s program, delivered by a subject matter expert who is not immediate family member to the student; must be detailed receipt listing tutoring dates, subject(s), number of hours and tutor contact information
- ❖ membership fees **student only**
 - library
 - support group

WISDOM Home Schooling does NOT reimburse parents for:

- ❖ competitions (e.g. swim meets, tournament costs)
 - ❖ registration fees, eg sports teams, community leagues, summer camps
 - ❖ phone plan or long distance costs
 - ❖ postage
 - ❖ phones, including smart phones
 - ❖ travel costs, including
 - fuel
 - meals
 - accommodation
 - camping equipment
 - camping fees
 - ❖ food stuffs
 - ❖ furniture of any kind
 - ❖ personal items, including
 - clothing
 - shoes of any kind, including sport shoes
 - kitchen supplies
 - cosmetology supplies
 - lumber/renovation costs
 - ❖ yard and garden expenses such as:
 - lumber, garden shed, garage...
 - quads, tractors or other equipment
 - swimming pools
 - playground equipment
 - playhouse or treehouse materials or packages
 - ❖ pet related expenses, including
 - animal purchase costs or “adoption” fees
 - animal food
 - grooming
 - pens/cages/terrariums/aquariums etc
 - veterinary fees
 - ❖ animal husbandry, training, etc
 - ❖ entertainment
 - movie tickets
 - TV/cable/satellite expense
 - Netflix/other movie-rental fees
 - amusement park tickets circus tickets
 - non-educational videos and DVDs
 - gaming consoles or handheld gaming devices
 - video or computer games
 - ❖ sport extras
 - fishing license
 - hunting or gun license
 - boating license
 - weapons (including archery)
 - ❖ graduation supplies (ie cap and gown, grad ring or other attire and materials)
 - ❖ photography sessions (including grad photos or other school photographs)
 - ❖ personal remuneration to parents or siblings of a student
 - ❖ post-secondary courses or training from a college or university (this includes any course taught at a college or university, including classes or lessons in a college fitness facility, for instance)
 - ❖ warranties/insurance, including
 - HSLDA
 - computer warranty
- Questions may be directed to: finance@trinitychristian.ca