

# **Home Education Funding Manual 2019-2020**



*September 2019*

## What is student funding?

Student funding is made available to families to provide financial support for educating their children at home.

### **Reimbursement is based on three conditions:**

1. Necessary for and related to the student's program;
2. Paid for and supported by invoices; and
3. Not usually paid for by parents of students in a brick-and-mortar school or not a form of remuneration to the parent.

These standards apply with respect to parent-developed and parent-directed home education programs, as well as home education programs following the Alberta programs of study.

### **Standards for Home Education Reimbursement**

Alberta Education strongly encourages emphasis on the importance of student program development. As reimbursement of funding is closely tied to the student program, the details of the program must be developed in compliance with the regulation.

***For those home education programs not following the Alberta programs of study, the written description of the program must include:***

- 1) Activities with an explanation of how those activities will enable the student to achieve the outcomes appropriate to the home education program;***
- 2) Instructional methods and resources;***
- 3) The means of evaluating student progress; and***
- 4) The name of the person instructing the home education program if not the parent.***

Whether a particular cost may be reimbursed depends, in part, on whether it is required by each student's program. This means that what is reimbursable for one student may not necessarily be reimbursable for another.

## Who receives student funding?

All students registered with RDCRS Home Education on or before the official count date per Alberta Education are eligible for student funding. This date is the last business day of September.

## What is the amount of student funding?

Students are eligible for funding in the amount of 50% of the grant the school receives from Alberta Education. This year the amount is \$835.00 per student.

## When is funding available?

Funding is available commencing Oct. 15, 2019. Because of the large volume of claim forms at the beginning and end of the year, expect the process to take longer than it would during the middle of the year.

## When can I make purchases?

Purchases can be made between June 1, 2019 and April 30, 2020. The date on the receipt must be within this time frame. Purchases made at the AHEA Convention 2019 may be considered for reimbursement in October of the 2019/20 school year and must be clearly indicated on the receipts. The purchases made must always be tied in with the student plan.

## When is the deadline to have receipts submitted?

The deadline for submission of receipts is April 30, 2020. If submissions are being forwarded by Canada Post, please ensure you allow enough time for delivery by this date. This is a firm deadline and it will be strictly honoured. Receipts cannot be submitted or received after this date.

## If all the funding is not used in one year, does the amount carry over to the next year?

Student funding cannot be carried forward from one year to another.

## Can I exceed my student funding if I have special circumstances or extraordinary expenses?

The total amount of student funding cannot be exceeded.

## How do I access my student funding?

Accessing these funds requires the family to first pay for the items and then seek reimbursement. All claims must be submitted according to the timelines previously stated and on the reimbursement form available on our website ([www.stgabrielschool.ca/home-school](http://www.stgabrielschool.ca/home-school)). Claims are processed in the order in which they are received. The claim is then sent to Central Office for payment through direct deposit. During our busiest times, it is not unusual for several weeks to go by before a family will receive their reimbursement. Be assured; our staff work diligently to offer you service.

## What items are covered by student funding?

**Determine if the expense being claimed is for something related to:**

- the programs of study;
- instructional materials; or
- other resources related to the home education program.

**NOTE:** "Other resources" must be related to the home education program, not the home education school.

**For clarification please contact your facilitator.**

- **Books:** such as novels, readers, maps, educational posters, etc.
- **Curriculum based:** such as workbooks, textbooks, reading books
- **Online curriculum programs** - learning programs on CD
- **School Supplies:** such as paper, pencils, art supplies, scissors, etc. (excluding stamps)
- **Language Programs:** pertaining to grade and/or skill level
- **Learning aids** – manipulatives (supported in the student program plan)
- **Computers, technology equipment** (i.e., printers), including repairs and upgrades
- **Internet services** – **50% of monthly fee** from September to end of June (original bill in its entirety for only one month is required - indicate how many and which months you wish to be reimbursed for)
- **Tutoring** – group or individual lessons necessary for the student's program delivered by a subject matter expert who is not an immediate family member
- **Lessons (up to a maximum of 50% of the funding provided to parents)** – including but not limited to music, swimming and language lessons taught by a certified instructor and in relation to the student's program
- **Tangible assets (up to a maximum of 50% of the funding provided to parents)** – e.g., cameras, telescopes, musical instruments, physical education equipment, sewing machines
- **Home economic edibles**
- **Postage/shipping and handling charges from vendors to home education family**
- **Admissions/field trips (up to a maximum of 50% of the funding provided to parents)** – ensure reimbursements are for activities related to the student's program, which may include zoo admission, theatre tickets related to literature study, museum admissions, science centre entrance fees, and multiuse recreation centres

Reimbursable amounts should be for the fees paid for the student only. The purchase of family admission is permissible in cases where it is more cost-effective than purchasing multiple individual student admissions. Multiple admissions or annual passes are acceptable for activities when directly related to the student's home education plan.

Reimbursement for parent admissions and travel costs are not acceptable.

## What items are NOT covered by student funding?

- **Transportation/Travel Costs:** Gas, Parking, Bus/Train Tickets, etc.
- **Accommodations**
- **Driver Training/Lessons**
- **Amusement Park Entrance and Ride Fees:** Galaxyland, Callaway Park, etc. (unless arranged by RDCRS)
- **Tutoring or Lessons by Family Members of the Student**
- **Musical accompanists, Exams (Including RCM), Festival Fees, Competition and Choir Dress Fees**
- **Competitions** - including, but not limited to swim meets and tournament costs
- **The Purchase of Gift Certificates/Coupons**
- **Clothing, Uniforms, Costumes, Helmets and Footwear**
- **Warranties and Insurance Fees**
- **Furniture**
- **Home Education Group Memberships and Conference Fees:** AHEA Convention, Home School Legal Defense, etc.
- **Room or Gym Rental**
- **Backpacks, Locks, Lunch Kits**
- **Registration fees** – including, but not limited to, sports teams, community leagues and summer camps
- **Gaming Consoles:** Xbox, PlayStation, Nintendo DS, Smart Phones, etc.
- **Testing, Tournament, Competition or Referee Fees, or Fees Charged in Lieu of Volunteer**
- **Time/Fundraising**
- **Any Motorized Sport:** Aircraft, Skydiving, Motocross, Snowmobiling, etc.
- **Postage, fax costs and long-distance charges to an associate school board or private school and its teachers**
- **Instrument Repairs**

## What information needs to be on the receipt?

1. **Original** – The receipt must be the original receipt and not a photocopy. If it is an electronic receipt (such as an emailed receipt) you can simply print it. You could keep a photocopy for yourself for warranty purposes.
2. **Vendor Name** - Name of the company or person you purchased from.
3. **Date** - The date of purchase.
4. **Items Purchased**- A list of items must be shown to make it clear what items were purchased. No personal items along with educational items are allowed. All items must be educational items for funded students. A till receipt alone will not be sufficient to support an expense claimed for reimbursement and must be accompanied by a detailed receipt.
5. **Total Price** - The total price paid and any Canadian tax must be shown.
6. **GST Number** - If GST was charged, the vendor's GST Registration Number must be shown. This is included on most receipts and will look something like this "R135664739". Some very small businesses are not required to have a GST Registration Number so they may tell you they do not have one. If a receipt is missing the GST Number you can write it on.
7. **Proof of Payment** - If it says "Receipt" then that is all that is needed.

If it does not say "Receipt", and says something like "Invoice", "Packing Slip", or "Order Confirmation" then the following is required depending on how it was paid for.

- a. Credit Card- It must say the type of credit card, for example "MasterCard", or have the last four digits of the credit card shown.
- b. Debit Card- It must say "Debit" or "Interac" or have the last four digits of the debit card shown.
- c. Cheque- It must say "Paid by Cheque" or "Cheque".
- d. Cash- It must say "Paid by Cash" or "Cash".

If the receipt does not show the proper information (or if you want to claim the Canadian dollar equivalent for a U.S. receipt) it must be accompanied by a bank statement, credit card statement, PayPal receipt, or copy of the cancelled cheque which shows the purchase and has a matching total.

## What steps do I take to submit my receipts? If steps are not followed below your claim will be returned to you for resubmission.

1. **Remove Staples** – Take all staples completely off all receipts. This allows the receipts to be scanned without jamming.
2. **Tape Receipts** – Tape all four sides of the original receipts onto one side only of a normal sized (8.5x11") sheet of paper unless they are already that size. **Do not tape receipts to both sides of the paper.** You can put more than one receipt on each page as long as they do not overlap. If a receipt is too long for the page, you must cut the receipt to make it fit without folding it. **Please do not highlight or cover any important information with the tape** – this will render the print invisible which will prevent reimbursement.

3. **Enter Receipts in Order by Date** - Going through each page of receipts **in date order**, enter the information from each receipt on the claim form. (See information below)
4. **Sign the Claim Form** – It is very important to put your name, mailing address and the date you filled out the form at the top and to sign it at the bottom. The student’s name must also be entered on the claim in the space provided at the bottom. **One claim per student.**
5. **Paper Clip or Staple Claim to Receipts** – The claim form should be on top of the pages of receipts and paper clipped or stapled (1 staple) to hold them together.
6. **Submit** - You can give your claim form to your facilitator or mail it to:  
**RDCRS Home Education**  
**St. Gabriel Learning Centre**  
**103 4706 48 Avenue**  
**Red Deer, AB T4N 6J4**

## What information do I enter on the claim form?

1. **Date** – The date of transaction which is on the receipt. When using the excel document it is helpful to put the date in this format Oct 22/19 so that it fits in the cell.
2. **Vendor** – Where the receipt is from. For example Best Buy or Brave Writer.
3. **Description** – What did you purchase? For example Math Curriculum or School Supplies or Computer or Learning Resources.
4. **Receipt Total** – This is the total cost of the resources you bought. It includes any tax (Canadian or U.S.) and shipping/handling. Whatever the total is on the receipt, which is what you enter here.
5. **GST & HST** – Enter any Canadian tax here (GST, PST, HST and QST). Do not enter the tax from a U.S. receipt unless it specifically says GST.
6. **Unit Amount** – This is the Receipt Total minus the GST. Don’t pay attention to what the receipt says the unit amount is, as sometimes it will not be the number we are looking for.

## Frequently asked questions about the Claim Form:

### **Which claim form should I use, the Excel or the PDF?**

You can use either one. Filling it out on your computer using the Excel claim form is preferred for a few reasons: it is easily readable, the unit amount is calculated for you and the totals are calculated for you. Not everyone is able to use the Excel file and that is why there is a PDF that you can print and write out by hand.

### **What about the GST Number?**

All companies in Canada that make over \$30,000 a year are required to have a GST Registration Number. This is sometimes also called the Business Number. Most receipts will have this printed on them and usually it will say “GST/HST” or “GST Number” followed by a series of numbers. If there is a receipt where GST was charged and there is no GST Registration Number, you will need to contact the company and ask them for it. You can simply write the number on the receipt before submitting it. If they are a very small company and do not have a GST Number then it is ok to submit without one.

**I still don't understand the Unit Amount.**

The Unit Amount column is just the Receipt Total minus the GST. It doesn't matter what the receipt says the unit amount is. Sometimes the receipt will be correct but sometimes it will separate out shipping/handling or other things. To double check that you have the right number, add the Unit Amount to the GST and the shipping and handling and it should equal the Receipt Total. If there is no GST or shipping and handling, then the Unit Amount will be the same number as the Receipt Total.

**My Receipt is from the U.S. What do I need to do differently?**

One difference is the tax. Unless the receipt specifically says that they are charging GST, then put a zero in the GST & HST Column. This means that the Receipt Total and Unit Amount will be the same number. Please include any shipping/handling and U.S. tax in the Total and Unit Amount.

Another difference is Canadian vs U.S. funds. You can always claim the amount shown on the receipt (which is usually the U.S. dollar amount). However, if you want to claim the Canadian dollar equivalent, it must show the exchange rate and Canadian total. If the receipt does not have that information you can provide a bank statement, credit card statement or PayPal receipt showing the exchange rate and the Canadian dollar amount.

**What if my order was made with separate payments?**

Whatever the receipt shows is what you should put on the claim form. If you received multiple receipts for a single order then they will need to be separate lines on the claim form. If there is just one receipt but it was taken out of your bank account or credit card on separate occasions then enter it all on one line.

**Can I group similar receipts (such as monthly piano lessons) onto one line of the claim form?**

No, please keep them separate. If you receive one receipt for 6 months of lessons then that can go on one line, otherwise each receipt should be a separate line on the claim form.

**I bought some personal items along with educational items. Can I use this receipt?**

No. Receipts must be for educational items only. Almost all stores are fine with you asking to pay for things separately.

**I have other questions about the claim form or funding. Whom should I contact?**

Your facilitator will be very happy to help you with any questions you may have.



## Claim Form Checklist

*Use this checklist to double check that everything is correct before sending in your claim form. These points are explained in greater detail in the Funding Manual on the website at [rdcrs.ca](http://rdcrs.ca).*

### All of my receipts show the following:

- Vendor Name
- Date
- Item(s) Purchased – must be clearly indicated on the receipt and should not include personal items, eg. groceries
- Total Price
- GST Registration Number (if GST was charged)
- Proof of Payment

### In addition:

- All of my receipts have all staples removed
- All of my receipts are taped onto one side only (not front and back) of an 8.5 x 11" piece of paper if they are not already that size **\*\*receipts must be taped down on all four sides**
- All receipts are cut to fit an 8.5x11" piece of paper and are not folded
- The tape does not cover any important information/print
- The claim form is attached to the top of the pages of receipts
- I have dated the claim form in the space provided at the top of the form
- I have provided my Family Mailing Address in the space provided at the top of the form (NOTE: this is not your email address)
- I have signed the claim form at the bottom
- My student's/child's name is on the bottom of the claim in the space provided (NOTE: only one child/student per form)
- I have entered all Canadian Tax in the GST column including GST, PST, HST and QST
- I only included Canadian Tax in the GST column and not U.S. Tax
- I have totaled each column and written the totals at the bottom
- When I add the Unit Total to the GST/HST Total it equals the Total Claim
- Packing slips, statements or order forms will not be accepted as proof of purchase. You must supply the receipt.
- I have not used a highlighter on any information/print on my receipts

**NOTE:** The above checklist must be completed in order to process your claim form. Failure to do so will result in your claim form being returned to you which could delay payment.