

# ODYSSEY

Iowa's Students First Act  
Education Savings Accounts  
Parent/Guardian Training

# Agenda

<b>Overview</b>	<b>Duration</b>
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Odyssey Support Team	5 minutes



# What is an ESA?

# What is an ESA?

- ✓ **ESA** is an acronym for “**E**ducation **S**avings **A**ccount.”
- ✓ An ESA holds funds for an eligible student until they are spent on eligible education expenses.
- ✓ Each state that offers ESAs has different rules and guidelines, as determined by law.
- ★ Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey portal. Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.



# Iowa's Students First Act ESA

For Iowa's Students First Act ESA, funds must *first* be used to pay accredited nonpublic school tuition and fees.

Any remaining funds can be used to pay other eligible educational expenses.





# **Iowa's Students First ESA Eligibility Criteria**

# Iowa's Students First Act ESA Eligibility Criteria

- ✓ Student is an Iowa resident.
- ✓ Enrolls in and attends a grade K-12 Iowa accredited nonpublic school for the 2025-2026 school year.
- ✓ Student will be 5 years old by September 15, 2025.



# Parent/Guardian Timeline



**Parent/Guardian  
Applications  
Open**

April 16, 2025



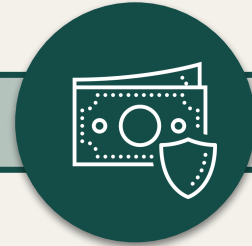
**Parent/Guardian  
Applications  
Close**

June 30, 2025



**Verification  
(Automated &  
Manual)**

April, May, June  
and July



**First Day for  
Approved ESAs  
to be Funded**

July 15, 2025\*

\*or 30 days after application approval,  
whichever is later.







# **Introduction to Parent/Guardian Application**



# Students Continuing the ESA Program

- Annual ESA applications are required for all prospective ESA participants.
- Parent/Guardian will use the same email address and password to log in to their account and complete the 2025-2026 application.

# Login Screen

- Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey portal.
- Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.

Language below text boxes: "By signing up, I understand that Odyssey needs to gather and share information about each child for which I seek an ESA and for each claim I make against that child's ESA. I give my consent to Odyssey to gather and share information necessary to implement my child's participation in the ESA program, including with the Iowa Department of Education and with the accredited nonpublic schools and providers serving my child. I understand my child will not be able to participate in the Students First Act ESA program if I refuse to grant my consent to Odyssey to gather and share necessary information.

Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey portal. Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.

Sign In

E-mail

Password

Keep me signed in

Login Create Parent Account

[Forgot your password?](#)

[Español](#)

By signing up, I understand that Odyssey needs to gather and share information about each child for which I seek an ESA and for each claim I make against that child's ESA. I give my consent to Odyssey to gather and share information necessary to implement my child's participation in the ESA program, including with the Iowa Department of Education and with the accredited nonpublic schools and providers serving my child. I understand my child will not be able to participate in the Students First Act ESA program if I refuse to grant my consent to Odyssey to gather and share necessary information.

Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey platform. Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.

# Parent/Guardian Application

- Parent/Guardian Information
  - Parent/Guardian Legal Name
  - Email Address
  - Phone Number
  - Preferred Language
- Address Information
  - Current Residential Address
  - If your 2024 Iowa State Tax Return lists a different address, please check the box and input that address.
- Save & Exit Feature

Iowa's Students First ESA Application

Step 1 of 4

### Parent/Guardian Information

Enter Parent/Guardian contact information.

Parent/Guardian's Legal First Name *	Parent/Guardian's Legal Middle Name
<input type="text"/>	<input type="text"/>
Parent/Guardian's Legal Last Name *	Email Address *
<input type="text"/>	<input type="text" value="help.ia@withodyssey.com"/>
Phone Number *	Preferred Language *
<input type="text" value="(XXX) XXX - XXXX"/>	<input type="text" value="English"/>

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### Address Information

Enter current residential address.

Parent/Guardian Address \*

Address Line 1

Address Line 2

<input type="text"/>	Iowa
City	State
<input type="text"/>	

Zip Code

A different address was used on my 2024 Iowa State Tax Return

# Student Application

- Student Legal Name
- Student Date of Birth
- Student Address
- Ability to Add Additional Students

Step 2 of 4

### Household Information

**Student Applications**

Add each student for whom an ESA is being requested.

Enter student's legal name and date of birth. Click the checkbox if the student does not share the same residential address as the parent/guardian.

After all students have been added, click "Next".

Click the "Save & Exit" button to save the application progress in order to return and complete it at a later time.

**Student's Legal First Name \***

**Student's Legal Middle Name**

**Student's Legal Last Name \***

**Date of Birth \***

Month:  Day:  Year:

Same Address as Parent/Guardian

[+ Add Student](#)

[Previous](#) [Next](#) [Save & Exit](#)

# Program Eligibility

- Parent/Guardian ID Type and Parent/Guardian Identification Number
- Spouse ID type and Spouse Identification Number
- This information will be used to verify Iowa residency with the Iowa Department of Revenue.
- If you did not file a 2024 Iowa State Tax Return, please click the checkbox.

Step 3 of 4

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**Consent & Approvals**

Please enter your Individual Tax Identification Number (ITIN) or Social Security Number (SSN) to verify program eligibility.

If you filed your 2024 Iowa State Tax Return in a married status, whether jointly or separately, **you must include the Spouse's information** to proceed with the application.

I did not file a 2024 Iowa State Tax Return.

**ID Type \*** **Parent/Guardian Identification Number \***

Social Security Number

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**Spouse Tax Identification Information**

Add Spouse's Tax Identification Number to application.

**Spouse's Legal First Name \*** **Spouse's Legal Last Name \***

**ID/Type \*** **Spouse's Identification Number \***

Social Security Number

# Consent & Approvals

- Guardianship Checks
- Site Release
- Communication Consent

Review each individual statement and check the box to affirm your understanding and agreement.

#### Guardianship Checks

- I have the legal authority to request an education savings account for the student(s) in this application.
- I confirm the student(s) included in this application have not been claimed on another application.

#### Site Release

- The State of Iowa and Odyssey may share information to verify my application information.

#### Communication Consent:

Please select at least one communication preference to proceed.

- I agree to receive email communications related to this application and the education savings account(s).
- I agree to receive text communications related to this application and the education savings account(s).
- I agree to receive phone call communications related to this application and the education savings account(s).

[Previous](#)

[Next](#)

[Save & Exit](#)

# Parent/Guardian Acknowledgements

- Review each statement and check the box to affirm your understanding and agreement.
- Sign electronically.
- Click "Submit" when completed.

Step 4 of 4

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### Parent/Guardian Acknowledgments

Review each individual statement and check the box to affirm your understanding and agreement.

**Please note: All boxes must be checked in order to proceed.**

- I affirm that the information in this application is true and complete.
- I understand that I must follow [Iowa Code section 267.11B](#) and the administrative rules implementing the statute.
- I understand students participating in an educational savings account are required to take all applicable state and federally required student assessments, which may or may not be provided directly by the school, and for which results are required to be submitted to the Iowa Department of Education.
- I understand it is my responsibility to know and follow the applicable law.
- I understand that the State of Iowa and Odyssey will take action if my information is incorrect or if any improper benefits are awarded to the education savings account of any of the students included in my application.
- I consent to sharing my information and each child's information with and by any individual or organization necessary for my participation and each child's participation in this program, including financial information and personally identifiable information from student records under [FERPA \(20 U.S.C. § 1232g\)](#).
- I understand that any individual or organization will keep the information private and protected and not release it without my consent, unless my consent is not required by this release or under applicable state or federal law.
- I understand this agreement is binding for as long as I participate and each child participates in the program and applies to any information given or benefit received.
- I understand that ESA funds will be used first to pay each semester's bill of tuition and fees (after any credits to that bill, such as scholarships or discounts) for my child. I may not pay a portion of my child's tuition bill out of my own pocket if I have currently available funds in my child's ESA account.
- By marking this checkbox, the undersigned authorizes the Iowa Department of Revenue (IDR) to release to the Iowa Department of Education any of the undersigned's tax information pertinent to this form, including but not limited to information related to state income tax.

**Parent/Guardian Digital Signature \*** **Date \***

4

11

2025

**Spouse Digital Signature \*** **Date \***

4

11

2025

[Previous](#) [Submit](#) [Save & Exit](#)





# Application Statuses

The majority of applications will be approved through the automatic approval process.

This process will make approvals simple, straightforward, and easy for parents.

## ***Pending***

- Your application is currently being reviewed. This process can take up to 30 minutes.

## ***Approved***

- 2024 Iowa State Tax Return verified residency.

## ***Not Eligible***

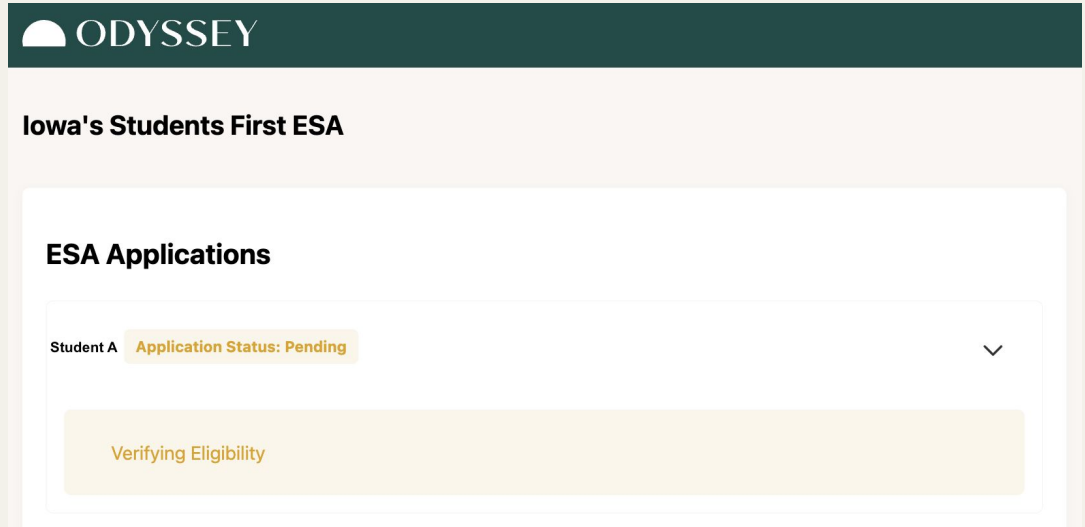
- Iowa residency was not able to be verified.

## ***Additional Information Needed***

- There was not enough information provided on the application to determine eligibility and more information is needed.

# Application Status: Pending

Applications are updated with responses typically within seconds of submission.



The screenshot shows the ODYSSEY logo at the top left. Below it, the text "Iowa's Students First ESA" is displayed. Underneath, there is a section titled "ESA Applications". A table lists "Student A" with an "Application Status: Pending" tag. Below the table, a yellow box contains the text "Verifying Eligibility".

**ODYSSEY**

**Iowa's Students First ESA**

**ESA Applications**

Student A	Application Status: Pending	▼
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Verifying Eligibility

# Application Status: Approved

Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey portal. Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.

- A student's application status appears behind their name.
  - Student A, Application Status: Approved.
- As soon as the application status is changed to "Approved," parents can select the school each student plans to attend for the 2025-2026 school year.

**ODYSSEY**

**Iowa's Students First ESA**

**ESA Applications**

Next steps: Click 'Select School' below to select the school your student plans to attend for the 2025-2026 school year.

- Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey platform.
- Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.

**Student A** Application Status: Approved

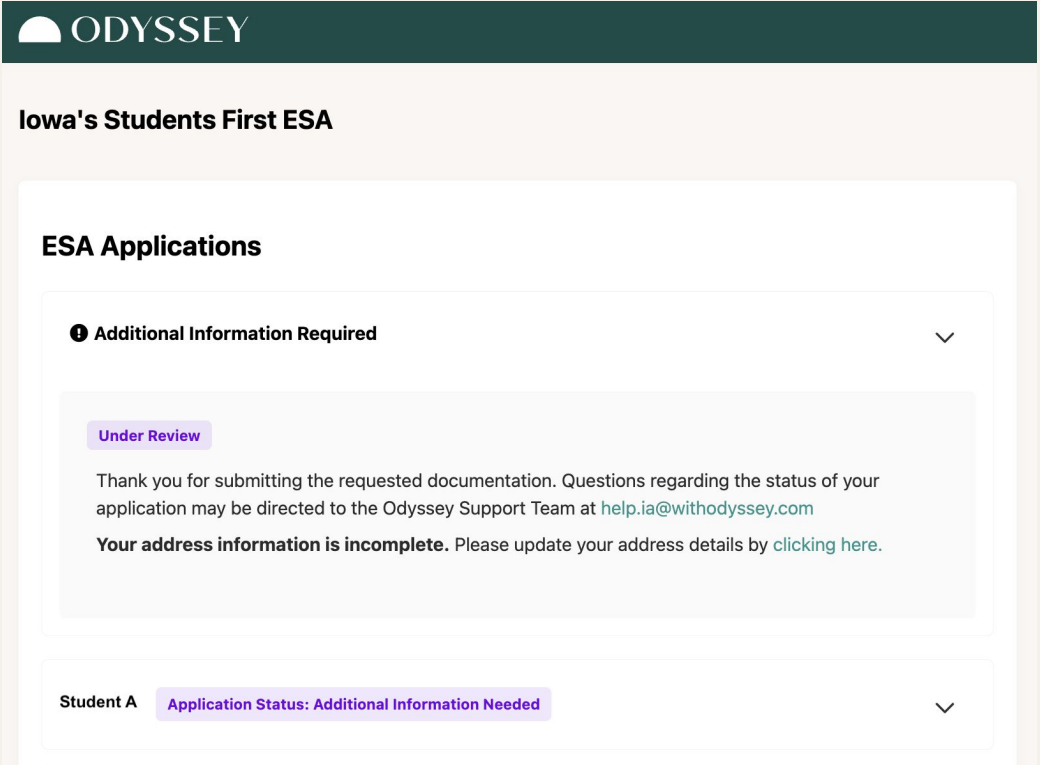
Your student application has been approved. Next Step: Select your school of choice. [Select School](#)

**Student B** Application Status: Approved

Your student application has been approved. Next Step: Select your school of choice. [Select School](#)

# Application Status: Additional Information Needed

- If the automated process is unable to confirm eligibility, Odyssey will prompt the parent/guardian to update information or upload additional documents.
- This status will apply to uncommon scenarios where additional documentation and manual review may be required.



The screenshot shows the Odyssey logo at the top left. Below it, the text "Iowa's Students First ESA" is displayed. The main heading is "ESA Applications". A dropdown menu is open, showing "Additional Information Required" with a downward arrow. Below this, a purple box labeled "Under Review" contains the text: "Thank you for submitting the requested documentation. Questions regarding the status of your application may be directed to the Odyssey Support Team at [help.ia@withodyssey.com](mailto:help.ia@withodyssey.com). Your address information is incomplete. Please update your address details by [clicking here](#)." At the bottom, another dropdown menu is open, showing "Student A" and a purple box with the text "Application Status: Additional Information Needed" and a downward arrow.

# Manual Review: Update Residency Information

- Odyssey may ask the parent/guardian to update their address used on their 2024 Iowa State Tax Return in order to further process verification.

**Additional Verification**

Please enter the address used on your 2024 Iowa State Tax Return.

- Please update the address that you shared on your form.

Address Line 1

Address Line 2

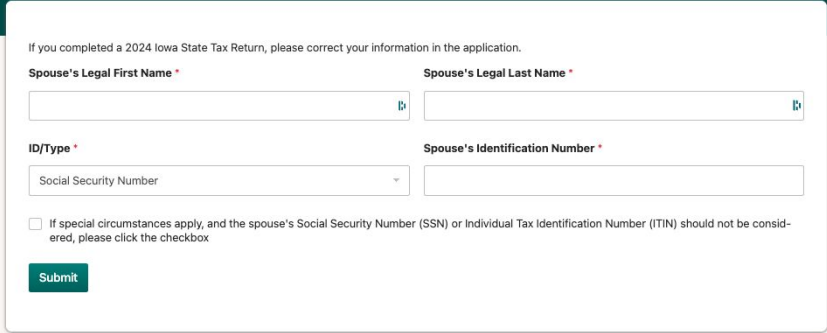
Iowa

City State

Zip Code

# Manual Review: Update Spouse Information

- If the parent/ guardian filed their 2024 Iowa State taxes jointly but didn't enter their spouse's information on the application initially, Odyssey may ask the parent/guardian to enter their spouse's information in order to further process verification.
- If special circumstances apply, click the check box and the parent/guardian will be asked to provide further documentation to verify eligibility.



The screenshot shows a web form titled "Update Application" with a dark green header. Below the header, a white box contains the following text: "If you completed a 2024 Iowa State Tax Return, please correct your information in the application." The form has four main input fields: "Spouse's Legal First Name" and "Spouse's Legal Last Name" (both text boxes with a small 'i' icon), "ID/Type" (a dropdown menu currently showing "Social Security Number"), and "Spouse's Identification Number" (a text box). Below these fields is a checkbox with the text: "If special circumstances apply, and the spouse's Social Security Number (SSN) or Individual Tax Identification Number (ITIN) should not be considered, please click the checkbox". At the bottom left of the form is a green "Submit" button.

# Application Status: Under Review

- Once documents have been uploaded, the Odyssey team will manually review.
- If additional documentation is required, Odyssey will contact the parent/guardian.

## Iowa's Students First ESA

### ESA Applications

#### Additional Information Required

##### Under Review

Thank you for submitting the requested documentation. Questions regarding the status of your application may be directed to the Odyssey Support Team at [help.ia@withodyssey.com](mailto:help.ia@withodyssey.com)

#### Residency Verification Uploaded:

Drivers License.png

Utility Bill.png

#### John Smith Application Status: Requires Manual Review

Your application requires manual review. To proceed, please ensure you submit all the required documents.

# 2025-2026 School Information

Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey portal.

For each student:

- Select school.
- Select grade.
- Click "Submit" to finish.

It is possible a newly accredited school for the 2025-2026 school year may not be available to select immediately. You may check with your school to confirm their participation in the program.

## Select School

Joe Smith

Select the Iowa accredited nonpublic school that this student plans to attend in the 2025-2026 school year.

Applying for enrollment to an Iowa accredited nonpublic school is a separate process from applying for an ESA through the Odyssey platform. Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.

It is possible a newly accredited school for the 2025-2026 school year may not be available to select immediately. You may check with your school to confirm their participation in the program.

Name of School:

Select School

Grade Level:

Select Grade Level

Cancel

Submit

**Nonpublic school enrollment is unrelated to the Students First ESA application and is strictly between the family and the school.**





# How Odyssey Verifies Eligibility



# How Odyssey Verifies Eligibility

## *Iowa Department of Revenue System Connection*

- Odyssey works with the Iowa Department of Revenue to automatically verify Iowa residency from each applicant's 2024 Iowa State Tax Return.
  - **This will verify a majority of applicants.**

## *If Additional Verification is Needed*

- If the automated check fails, the Odyssey system will request a parent/guardian to upload additional verification documents to determine eligibility.



# How Odyssey Verifies Eligibility

## ***If Additional Verification is Needed***

If the automated check for residency is unsuccessful, the Odyssey system will request the parent/guardian to upload additional verification documents.

### **Option 1:**

- Current Iowa Driver's License (dated no later than June 30, 2025)

### **Option 2:**

- Proof of Residence (current mortgage, lease, utility bill) and one of the following:
  - Iowa Voter Registration Card
  - Claim of Homestead Credit or Military Tax Exemption on a home in Iowa
  - Active checking or savings account with an Iowa address
  - Other documents and correspondence initiated during tax periods with an Iowa address

### **Option 3:**

- Other written and signed narrative from parent/guardian including a stated claim of Iowa residency, and related documentation reflecting residency.



# School Attendance

Schools are required to inform Odyssey if an invoice was submitted for a student who did not attend.

***Scenario:***

Tuition was billed to Odyssey on July 15, school started August 23, but the student did not attend.

**Students are not eligible for an ESA if they do not attend an Iowa accredited nonpublic school.**

**ESA funds must be returned by the school for the semester(s) in which the student did not attend.**

- ESA ineligibility does not absolve individuals from financial obligations they have directly entered into with a nonpublic school or any other vendor.



# How can I use my ESA funds?



**ESA Funds must first be used to  
pay accredited nonpublic school  
tuition and fees.**



# After Tuition and Fees Are Paid

- Remaining ESA funds can be used to pay for other eligible educational expenses.
- A list of [ESA - Eligible and Ineligible Expenses](#) is available on the Department of Education's ESA web page.



# Eligible Expenses

Beyond tuition and fees, examples of eligible expenses are provided below.

- Microsoft Office and Adobe products
  - Laptops, desktops, and tablets
  - Textbooks
  - Tutoring
  - Course materials
- ★ A list of [ESA - Eligible and Ineligible Expenses](#) is available on the Department of Education's ESA web page.





# Ineligible Expenses

Examples of ineligible expenses are provided below.

- Personal bags (e.g., backpack, laptop bag, purse)
  - Clothing (e.g., uniforms, hats)
  - Basic school supplies (e.g., paper, glue, pens, pencils, cleaning supplies)
  - Childcare (e.g., before and after school care)
  - Camps (e.g., summer, winter, holiday, athletic)
- ★ A list of [ESA - Eligible and Ineligible Expenses](#) is available on the Department of Education's ESA web page.



# How do I spend my ESA funds?

- Purchases with ESA funds can only be made through the Odyssey Marketplace.
- Any purchases made outside of the Odyssey Marketplace are ineligible and will not be reimbursed.



# What is the Odyssey Marketplace?

- The Odyssey Marketplace is a closed marketplace with eligible vendors, products, and service offerings specifically approved for Iowa's Students First Act ESA program.
- Examples of Odyssey Marketplace vendors are provided below.
  - Iowa's accredited nonpublic schools
  - Computer stores
  - Educational therapies
  - Tutoring
  - Local and national vendors



# Odyssey Support Team



# Customer Support Availability

***Contact Odyssey for technical issues.***

We have a fantastic support team that has experience working with parents and vendors to help answer their questions and troubleshoot any issues.

We provide service in both English and Spanish on phone, chat, and email. Our Knowledge Center is available at [support.withodyssey.com](https://support.withodyssey.com).

Monday-Friday  
7am-9pm CT

Saturday-Sunday  
10am-4pm CT



# Questions Following Training

If you have questions regarding the application, please contact the Odyssey support team during regular business hours at:

help.ia@withodyssey.com

515-368-9564

- ★ This slide deck is available on the Iowa Department of Education's [Students First Act ESA web page](#).