

**HOME EDUCATION REIMBURSEMENT REQUEST  
PHOENIX EDUCATION FOUNDATION  
2021-2022**



**Student Name:** \_\_\_\_\_ **Parent Name:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_ **Postal Code:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Phone:** \_\_\_\_\_ **Learning Coach:** \_\_\_\_\_

Date	Supplier	Amount	OFFICE USE: Listed on Ed Plan
Grand Total:			

**REMINDERS**

1. Purchases must be necessary for and related to the student's program and listed on the Ed Plan.
2. Only submit original and itemized receipts.
3. Purchases must be for items or services that a school normally provides to all students.

**REIMBURSEMENT PROCESS**

1. Fill out Reimbursement form.
2. Attach receipts. Tape loose receipts to one side of an 8.5" x 11" piece of paper.
3. Hand in form and receipts to **FRONT DESK** or email to **frontdesk@phoenixfoundation.ca**
4. Please allow 30 days for processing.
5. Funding is released 3 times over the year:
  - 1. Oct 31: \$340.00 or 40%**  
For claims received between Sept 1 - Oct 31
  - 2. Jan 31: \$170.00 or 20%**  
For claims received between Nov 1 - Jan 31
  - 3. June 30: \$340.00 or 40%**  
For claims received between Feb 1 - June 15

**Parent Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Office Use Only					Learning Coach:
Date	Amount	Carry Forward	Posted	chq #	
					<b>Date:</b> _____  <i>I verify that all of these purchases are listed in the student's Education Plan and relate specifically to Schedule Outcomes and the student's program</i>

## HOME EDUCATION REIMBURSEMENT GUIDELINES

2021 - 2022

Funding will not be released until you have met the requirements for a given timeframe. These include; completing the application form, paying your application fee, having an approved Education Plan, attending Report Card meeting(s), returning rental items like textbooks and Chromebooks.

- \*\* If you submit \$637.50 worth of receipts (75% of your funding), your entire \$850.00 will be disbursed according to our disbursement schedule.
- \*\* You have 2 years to access your funding.
- \*\* You may transfer any portion of your Home Education funding to Phoenix by signing the Parent Declaration to Transfer Home Education Funding.
- \*\* If you do not claim or transfer the unused portion of your grant, the unclaimed portion will be returned to Alberta Education.

### WHAT CAN I SUBMIT?

**\*\* All items MUST be part of your student's education plan and be listed on your Ed Plan \*\***

**Consumables** - paper, pencils, art supplies, ink

**Curriculum-Based** - workbooks, textbooks, reading books, online programs

**Learning Aids** - manipulatives

**Technology** - computers, ipads, printers; including repairs and upgrades

**Internet Services** - 50% of monthly fee - September thru August of current school year

**Tutoring** - group or individual lessons as part of the student's program delivered by a subject matter expert who is NOT an immediate family member

**Lessons** - including, but not limited to; music, swimming, language lessons. Taught by a certified instructor.

**Tangible Assets** - including, but not limited to; cameras, telescopes, musical instruments, phys ed equipment, sewing machines.

**Admissions** - **Up to a maximum of 50% of the funding provided to parents.**

\* Includes; zoo admission, theatre tickets, museum admissions, science centre, multi-use recreation facilities

\* Reimbursable amounts are 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 single student admissions.

\* Multiple admission or annual passes are acceptable.

\* Reimbursement for parent admission and travel costs are NOT acceptable.

**Postage/Shipping** - from vendors to the home education family.

### NOT RECOMMENDED FOR REIMBURSEMENT:

\* Furniture

\* Warranties/Insurance

\* Travel Costs

\* Competitions - ie. swim meets, tournament costs

\* Registration Fees - ie. community leagues, summer camps, sports teams

\* Postage, fax, long-distance charges to an associate school board or private school and its teachers.

### RECEIPT GUIDELINES:

- \* Must be **ORIGINAL** and **ITEMIZED**. No photocopies. No credit card statements or debit card receipts. If you require an additional receipt for warranty, please ask for a duplicate when you make your purchase, or keep a photocopy for yourself.
- \* For internet claim, please submit **ONE** month's invoice **ONLY**.
- \* Pay for your educational items **SEPERATELY** from your personal items, such as groceries.
- \* Purchases made in foreign currency must show the paid value in Canadian dollars.
- \* Handwritten receipts are acceptable and must include: seller's name, date, amount, payment method and brief description of item(s).
- \* Receipts must be dated during the current year of your student's education plan.

### SUBMITTING YOUR CLAIM:

- \* Drop off at Front Desk
- \* Mail to: Phoenix Foundation, 320 - 19 Street SE, Calgary, AB T2E 6J6
- \* Email to: [frontdesk@phoenixfoundation.ca](mailto:frontdesk@phoenixfoundation.ca)
  - \* Scan all receipts as a **SINGLE** attachment. Do **NOT** send each receipt as an individual attachment.
  - \* Attachments **MUST** be .pdf format. Photographs of receipts sent as .jpg, .gif, etc will not be processed.
- \* **ALL RECEIPTS and CLAIM FORMS MUST BE RECEIVED BY JUNE 15.**