

Step by Step Guidance on Adding and Uploading Student Documentation in APEX ESA

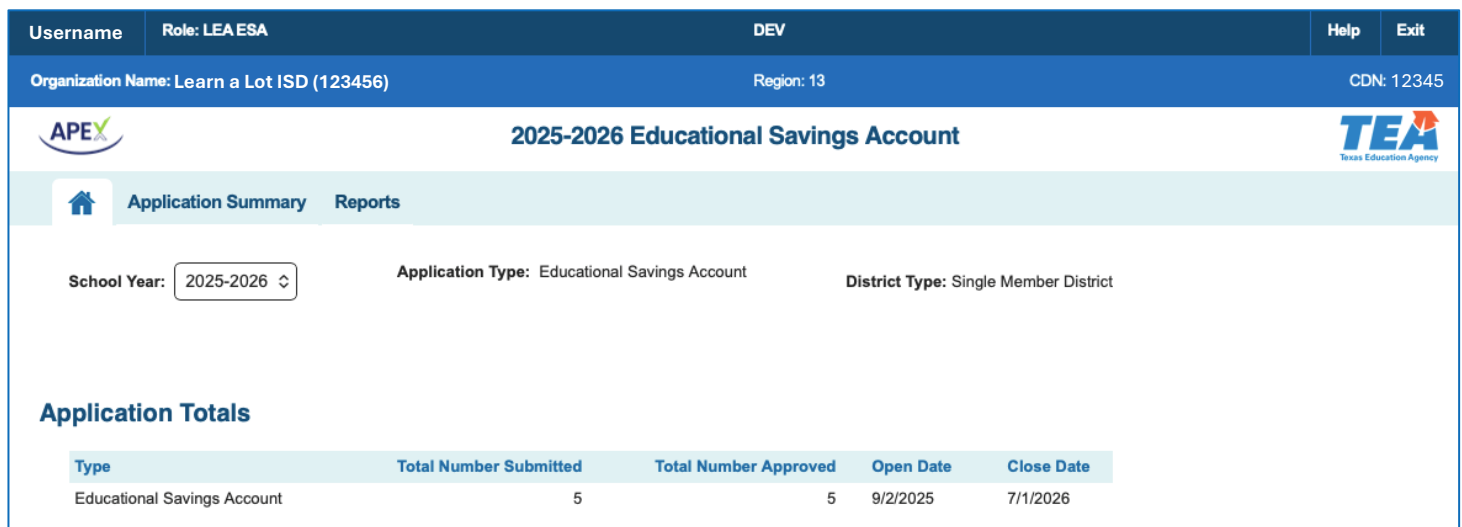
Request TEAL Access

This application and upload will be done in APEX ESA – built from the existing APEX system.

- This will require additional TEAL access if you already have APEX access.
- LEAs should request access to **APEX in TEAL**. This will be by LEA, so superintendents will be the approvers for individual access. **“LEA ESA Rep”** is the access needed for uploading documentation and adding a student.
- Note: Single member districts – in special education shared services arrangement (SSA) – will only be able to request **LEA ESA Viewer** and will be unable to submit an application. In these cases, your fiscal agent will need to submit the APEX-ESA application on your behalf.

Home Screen/Dashboard:

- Across the top you’ll see the username, role, LEA name, the region, and the CDN.

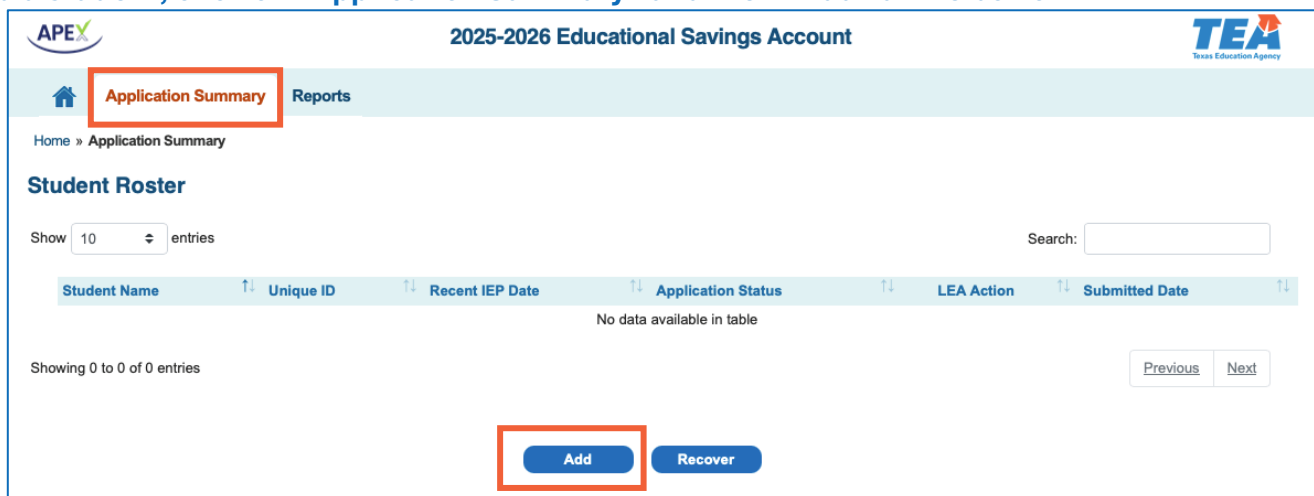


The screenshot shows the APEX ESA Home Screen/Dashboard. At the top, there is a header bar with the following information: Username, Role: LEA ESA, DEV, Help, and Exit. Below this, there is a section for Organization Name: Learn a Lot ISD (123456), Region: 13, and CDN: 12345. The main content area features the APEX logo, the title "2025-2026 Educational Savings Account", and the TEA logo. Below this, there is a navigation bar with "Application Summary" and "Reports". The "Application Summary" section displays the School Year: 2025-2026, Application Type: Educational Savings Account, and District Type: Single Member District. Below this, there is a section titled "Application Totals" with a table showing the following data:

Type	Total Number Submitted	Total Number Approved	Open Date	Close Date
Educational Savings Account	5	5	9/2/2025	7/1/2026

Add Students, Enter Student Information, and Upload Documentation

To add a student, click on “Application Summary” and then “Add” at the bottom.



The screenshot shows the APEX ESA Application Summary page. At the top, there is a header bar with the following information: APEX logo, title "2025-2026 Educational Savings Account", and TEA logo. Below this, there is a navigation bar with "Application Summary" and "Reports". The "Application Summary" section displays the breadcrumb "Home » Application Summary" and the title "Student Roster". Below this, there is a search bar and a table with the following columns: Student Name, Unique ID, Recent IEP Date, Application Status, LEA Action, and Submitted Date. The table is currently empty, with the message "No data available in table" displayed below it. At the bottom of the page, there are two buttons: "Add" and "Recover".

After you have added student(s), you will see the list of applications here as well – screenshot in the “Application Summary” section.

Lookup Student:

When you click on “Add”, you will see this pop-up window. You must know the student’s 10-digit UID. **Students must have a 10-digit UID to apply as a student with a disability.** Once the UID is entered, click “ID Search” – the other fields below will auto-populate. re

Add Student

Unique ID:

ID Search

First Name:

Last Name:

Date of Birth:

Gender:

Add

Cancel

After you have clicked “Add”, you will return to the “Application Summary” page. You can then click on the student’s hyperlinked name to begin the actual application.

Enter Student Information:

When you click on a student’s name from the “Application Summary” page, you will be taken to this screen. All fields below are required. See each section below for what is needed.

Student Information

Status : Not Started

Unique ID

1234567890

District Name

Learn a Lot ISD

First Name

First Name

Date of Birth

09/18/1995

Last Name

Last Name

Gender

F

Most Recent Evaluation Date

12/31/2025

Most Recent IEP Date

12/31/2025

Special Education

☐ Yes
 ☐ No

ESA Applicant

--- SELECT ---

Current Education Setting

--- SELECT ---

Student Details For Funding

Instructional Setting

--- SELECT ---

Disability Area

--- SELECT ---

Student Information:

The top section – that is grayed out - will auto-populate based off of the student’s UID and you cannot edit this section.

LEAs will need to manually enter the following student information:

- Enter the “Most Recent Evaluation Date” – this should match the information on their FIE/FIIE or IEP.

Most Recent Evaluation Date

12/31/2025

- Enter the “Most Recent IEP Date” – this should match the information on the IEP you upload/attach.

Most Recent IEP Date

12/31/2025

- If you know the student is an ESA Applicant, please choose “Yes” or “No” here, if you do not know, you can select “Unknown”.

ESA Applicant

✓ -- SELECT --

Yes

No

Unknown

Student Details For

- If this student would be receiving special education services, please select “Yes”. If the student would not be receiving special education services, please select “No”. **Note**, if “No” is selected here, make sure you choose “student was not identified for special education” from the dropdowns for both “Instructional Setting” and “Primary Disability” in the “Student Details for Funding” section below.

Special Education

☒ Yes
 ☐ No

- Select the student’s “Current Education Setting” – “Public”, “Private”, or “Homeschool”.

Special Education

Current Education Setting

-- SELECT --

Public

✓ Private

Homeschool

Student Details for Funding:

- Choose the “Instructional Setting” from the dropdown that the student would be placed in should they attend your LEA and according to their IEP.
 - Note: “0-No Instructional Setting” is the same as “00-No Instructional Setting (Such as Speech Therapy)”.
 - If the **student does not qualify for special education services**, and you’ve selected “no” for “Special Education” in the section above, this section will be grayed out.

--- SELECT ---

- 0-No Instructional Setting
- 1-Homebound
- 2-Hospital class
- 8-Vocational Adjustment Class/Program
- 30-State Supported Living Center
- 40-Mainstream
- 41-Resource Room <21%
- 42-Resource Room at least 21% and less than 50%
- 43-Self-Contained, Regular Campus at least 50% and no more than 60%
- 44-Self-Contained, Regular Campus more than 60%
- 45-Full-Time Early Childhood Special Education Setting
- 50-Residential Nonpublic School Program
- 60-Nonpublic Day School
- 81-Residential Care & Treatment (RCT), Mainstream
- 82-Residential Care & Treatment (RCT), Resource Room <21%
- 83-Residential Care & Treatment (RCT), Resource Room at least 21% and <50%
- 84-Residential Care & Treatment (RCT), Self-Cont. Reg Camp. >=50% and <60%
- 85-Residential Care & Treatment (RCT), Self-Cont. Reg Camp. more than 60%
- 86-Residential Care & Treatment (RCT), Separate Campus
- 87-Residential Care & Treatment (RCT), Community Class
- 88-Residential Care & Treatment (RCT), Vocational Adjustment Class/Program
- 89-Residential Care & Treatment (RCT), Full-Time Early Childhood Special Ed
- 91-Off Home Campus, Mainstream
- ✓ 92-Off Home Campus, Resource Room <21%
- 93-Off Home Campus and Resource Room at least 21% and less than 50%
- 94-Off Home Campus, Self-Contained, Regular Campus at least 50% & <=60%
- 95-Off Home Campus, Self-Contained, Regular Campus more than 60%
- 96-Off Home Campus, Separate Campus
- 97-Off Home Campus, Community Class
- 98-Off Home Campus, Full-Time Early Childhood Special Education

- After an “Instructional Setting” has been selected, you will see the option to select if the student has a **“Speech Indicator”** – “Select “Yes” if the student is receiving speech therapy – this should match their IEP.

Student Details For Funding

Instructional Setting: 40-Mainstream

Speech Indicator: ☐ Yes ☐ No

Primary Disability: --- SELECT ---

- Important:** If the student has an “Instructional Setting” of **“0-No Instructional Setting”**, you will not see the **“Speech Indicator”** option as their funding will come from the “Instructional Setting” only.

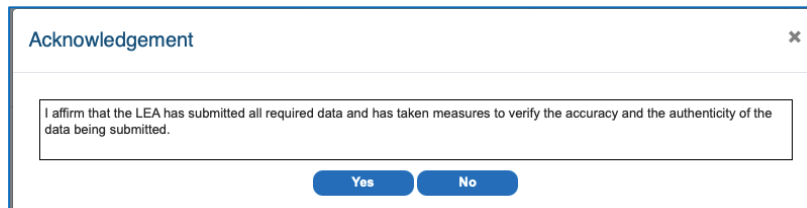
Student Details For Funding

Instructional Setting: 0-No Instructional Setting

Primary Disability: --- SELECT ---

- Choose their “Primary Disability” from the dropdown – this should match their disability on their IEP. If the student **was not found eligible for special education** and does not have a primary disability, choose “student was not identified for special education” from the dropdown.

- After you click on “View” you will see the pop-up below, with the “Acknowledgement” of: “I affirm that the LEA has submitted all required data and has taken measures to verify the accuracy and the authenticity of the data being submitted.”
- You must select “Yes” to be able to submit the application.



A pop-up box titled "Acknowledgement" with a close button (X) in the top right corner. Inside the box, there is a text area containing the statement: "I affirm that the LEA has submitted all required data and has taken measures to verify the accuracy and the authenticity of the data being submitted." Below the text area are two buttons: "Yes" and "No".

- After you’ve selected “Yes”, it will close the box. Now the “Accepted” box on the main screen is checked.



A box titled "Statement of Acknowledgement". It contains a "View" button and a radio button labeled "Accepted" which is selected.

Clarification/Communication Notes:

- You can add a note to the application using the “Add Note” button here. If there is clarification needed or if the reviewers have left notes on the application, you can view those here.



A box titled "Clarification/Communication Notes" with a question mark icon. It contains an "Add Note" button.

Certify and Submit:

- After you have entered all the information, select “Certify and Submit” to submit the application.
- If you wish to come back to this application later to complete it, you can select “Save” and it will save the current progress on this application and set the status to “Pending”.
- After you’ve selected “Certify and Submit”, the person submitting will receive a confirmation email.



Two buttons: "Save" and "Certify and Submit".

Application Summary:

On the “Application Summary” view/tab, you can see the status for each of the students with active applications.

Student Roster:

- Student names are hyperlinked; clicking on a name will open the “Student Information” page. If applications are “Approved”, the information on the “Student Information” page will not be able to be edited. Other application statuses will be editable.
- These are sorted by the student’s first name by default. You can click on the arrows to sort by any of the other columns.

Organization Name: Learn a Lot ISD (123456)
Region: 13
CDN: 123456

2025-2026 Educational Savings Account

Home » Application Summary
Reports

Student Roster

Show 10 entries Search:

Student Name	Unique ID	Recent IEP Date	Application Status	LEA Action	Submitted Date
Amanda Banks	5044568791	12/02/2025	Approved		12/29/2025
John Smith	1234568790	12/02/2023	Pending	<button>Delete</button>	
Jonny Doe	2044568795	10/31/2025	Approved		12/29/2025
Jose Garcia	7044568795		Not Started	<button>Delete</button>	
Mary Smith	6044568791		Not Started	<button>Delete</button>	

Showing 1 to 10 of 14 entries

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- You can “Search” using the “Search” field – the “Search” will search all the columns, so you can search by application statuses, name, etc.
- If you wish to “Delete” an application, you can do so by clicking the “Delete” button on the “LEA Actions”. Once you’ve clicked “Delete”, you will need to “Select Delete Reason”. If you select “Other” you will be provided with an open response text box to enter the reason for deletion.

Please Select Delete Reason

Delete Reason:

✓ -- SELECT --

Parent enrolled student in District

Parent withdrew evaluation request

Student moved from District

Other

- If you delete a student, you’ll need to use the “Recover” button next to the “Add” button on the “Application Summary” page.

Add
Recover

- If you try and add a student and get this message: “This Student was previously deleted and cannot be added again. Please Recover the student by selecting the “Recover” button”

Add Student

This Student was previously deleted and cannot be added again.
Please Recover the student by selecting the "Recover" button

Unique ID: 5044568791 ID Search

First Name: Last Name:

Date of Birth: Gender:

Add Cancel

- This message means this student has been previously added; you'll need to use the "Recover" button next to the "Add" button on the "Application Summary" page to "Add" this student.

Add
Recover

- When you click on "Recover", this will show all students that have been removed/deleted. Check the checkbox next to the student's name to add them back to your "Application Summary" list. You'll see the "Delete Reason" here on all deleted applications.

Recover ESA Applications

Student Name	Placement Status	Delete Reason
☐ Amanda Banks	Recover	Other (Test)

Cancel