



ESA Families,

The Office of Public Instruction is grateful to implement [HB 393](#), a new legislative request from the 2023 legislative session. This fall marks the initial year of the Education Savings Account (ESA) program which provides families of students with unique abilities the opportunity for choice in their child's educational resources. Students with identified IDEA disability categories and were enrolled in a public school the prior year, are eligible for the program. We are excited to announce that we have a total of 19 students participating in the ESA program! Below you will find information about the reimbursement process and upcoming events.



There was a preliminary injunction against HB 393. The district court denied the injunction order, so work continues to go forward on the ESA program. There will still be a court date scheduled in the future, but for now, we continue as the law prescribes. See a [press release here](#).

You're invited! Please join me, Whitney Williams, ESA Specialist, for a virtual *ESA Q&A session* on August 21, 2024 @ 1:00pm- 2:00pm. This will be an opportunity for participating families and school districts representatives to ask questions about this new program.

Join the meeting at the following link: [Join the meeting now](#)

Reimbursement process:

The [reimbursement request form](#) and submission instructions can be located on the [ESA Website](#). Families can start submitting reimbursement requests for allowable expenses incurred on/after July 1, 2024. Reimbursement requests must be completed and submitted to OPI by the 25th of the month. Approved requests will be paid during the following month. The first round of reimbursements will occur in September 2024 for reimbursements submitted through July 1 – August 25, 2024.

Reimbursement receipts must include vendor details, shipping information, the purchase date, and proof of payment received for the items. If multiple items are ordered through one company, such as Amazon, please make sure to include an itemized receipt. Order confirmations are not acceptable as they do not provide proof of payment. Parents must provide a description of the reimbursable items and their intended use.

REMINDER:

Before reimbursements can be distributed to enrolled families, a W-9 form will need to be completed and returned to OPI. This will allow the Office of Public Instruction to create an account within our payment system. If you would prefer to have reimbursements directly deposited into an account, you will need to complete the EFT (Direct Deposit) form and include

a voided check. If you prefer to have a check distributed, please disregard the EFT form. OPI will not be able to distribute funds until the completed W-9 has been received back.

The W-9 and EFT (Direct Deposit) forms were sent out to families on July 11, 2024, but are also attached to this document.

The forms can be returned to OPI through the [Montana File Transfer Service Portal](#). To protect your private information, please do not send documents directly through email. To utilize the portal, you will first have to register with an account. Below you can find instruction manuals on how to create an account and submit forms. Completed forms can be sent to Whitney Williams - Whitney.Williams2@mt.gov.

<https://transfer.mt.gov/Home/Instructions>

<https://boards.bsd.dli.mt.gov/docs/fnr/fts-instructions.pdf>

This W-9 form is for Montana state administrative purposes only and is not considered taxable income. The information provided to the Office of Public Instruction is intended only for the purposes of the Education Savings Account reimbursement. All information provided will be kept secure and confidential to protect privacy.

New to Montana Families:

Students who were approved for the Education Savings Account program will still need to be registered with the local school district so they can be counted for ANB purposes.

Upcoming Events:

We are in the process of launching a new on-line system for the ESA Reimbursement program that will be more user friendly for parents participating in the program. This system will allow parents to log in to their students account to submit reimbursements, view receipt uploads, track payments processed, and check balances. As soon as we have more information, we will share it with families along with detailed instructions on how to utilize the system.

The Office of Public Instruction will be sending notifications to the resident school district for students enrolled in the Education Savings Account Program. Please be aware that the school districts may contact parents for additional information.

Next ESA Parent Steering Committee Meeting – August 12th 4pm – 5:30pm – Virtual.

The steering committee provides strategic advisory support to ensure the ESA program meets the needs of the families in the ESA program. Please visit the [ESA website](#) to view previous meetings. To request a link for the upcoming meeting, please contact Whitney Williams (OPIESA@mt.gov).

Please share with friends and family who might benefit from enrolling in the Education Savings Account program. The second round of applications will be opening November 1 - December 1, 2024.