

# **ESA Reimbursement Form**

The Education Savings Account reimbursement form can be located on the [ESA website](#).

To access, click the “[Reimbursement Request Form](#)” link:

**Qualified ESA Parents can begin submitting receipts July 1st, 2024.**

The first round of reimbursements submitted to OPI will be processed after September 10th, 2024.

1. [Reimbursement Request Form](#)
2. List of Eligible Reimbursements
3. Instructions

- 1) Please read through the information provided on the first page of the reimbursement form. Click the blue arrow at the bottom right of the screen to start the application:



## **Education Savings Account Reimbursement Form**

Welcome to the ESA program! The following form is for families who have been approved for the program and have successfully returned a signed contract back to the Office of Public Instruction. For more information on eligible reimbursements go to the [ESA webpage](#) or visit page 8 of the [Parent Handbook](#). Please read through this list carefully before submitting reimbursement receipts to OPI.

Reimbursements will be processed for allowable expenses incurred on/after July 1, 2024. To ensure timely processing, all reimbursement requests must be completed and submitted to OPI by the 25th of the month for processing after the 10th of the following month. The OPI will review all receipts for accuracy, request additional information as necessary, and verify that sufficient funding is available in the trust account. Once approved, payment will be processed after the 10th of the following month.

Note - The first round of approved reimbursements requests submitted to OPI between July 1 and August 25, 2024, will be paid after September 10, 2024.

Questions regarding ESA reimbursements can be directed to Whitney Williams via email at [opiesa@mt.gov](mailto:opiesa@mt.gov) or 406-444-3408.



- 2) Enter student and parent information on the form as shown below. This information should match what was provided on the original application. When complete, click the blue arrow to move to the next page:

Enter Student Information

First Name:	<input type="text" value="Charlie"/>
Last Name:	<input type="text" value="Brown"/>
Birthdate (mm/dd/yyyy):	<input type="text" value="07/01/2024"/>

Enter Custodial Parent/Guardian Information

First Name:	<input type="text" value="Miriam"/>
Last Name:	<input type="text" value="Brown"/>
Email:	<input type="text" value="MBrown@gmail.com"/>



- 3) Certify that the receipts to be uploaded are eligible purchases through the ESA program, and that your child is not currently enrolled in public school. To move forward, click the blue arrow. To go back and make changes to the previous page, click the back arrow highlighted in purple below.

Today's Date

I certify that the attached receipts are approved purchases through the ESA Program.

I certify

I certify that my child is not currently enrolled in public school.

I certify



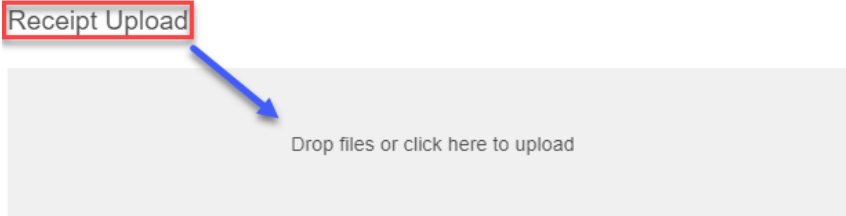
- 4) The next page will allow you to upload 5 eligible receipts for the ESA program. Please ensure that all receipts are ESA eligible reimbursements. For more information on eligible reimbursements go to the [ESA webpage](#) or visit page 8 of the [Parent Handbook](#).

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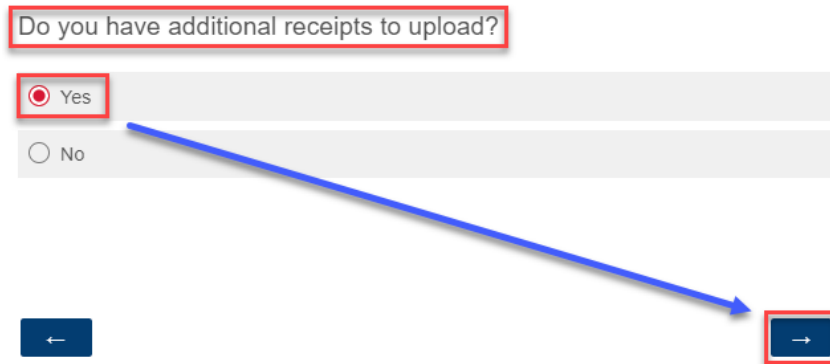
If you have questions about a specific allowable item, contact Whitney Williams at [opiesa@mt.gov](mailto:opiesa@mt.gov).

Upload receipts in the file upload boxes below.

**Note:** Only one file per upload



**If you have more than 5 receipts to upload, click YES under the “Do you have additional receipts to upload” and click the blue arrow. The next screen will allow you to upload an additional 10 receipts for reimbursement.**



- 5) After you have uploaded all eligible receipts, click the blue Submit button located at the bottom right.



The reimbursement form has now been successfully submitted to OPI for review! Please remember that all 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.