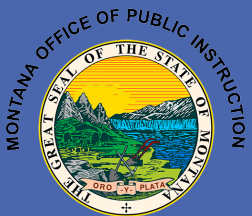


# EDUCATION SAVINGS ACCOUNT

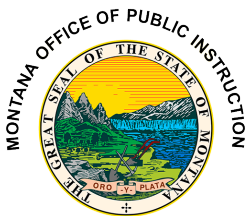
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District Webinar – January 14, 2025



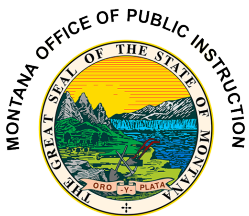
# What is the Education Savings Account?

- The Education Savings Account is a reimbursement program for parents of a child with a disability under IDEA. The purpose of this program is to provide parents with more flexibility when it comes to their child's education outside of a public school system.
- If a student is determined eligible and enrolls in the ESA program, they cannot be enrolled in a Montana public school at the same time. If a student were to re-enroll back into a public school, then it would terminate them from the program and any future funding they would receive.
- If a student is approved for the program, funds will be deposited into the students trust account monthly. The parent of the approved ESA student can submit reimbursement requests for tutoring expenses, textbooks, tuition costs, or additional online courses that their child may require to succeed. For a full list of allowable and unallowable reimbursements, please visit our [ESA website](#).
- The team at OPI will review the requests monthly to determine if the expenses are allowable before reimbursements are drawn from the student's trust account.
- If the child remains enrolled in the ESA program, they will have access to these funds up until their 24<sup>th</sup> birthday.



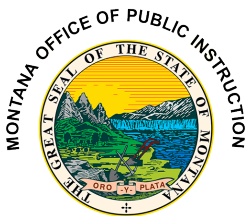
# What determines if a student is eligible for ESA?

- To have been eligible for the ESA program in May 2024 and November 2024, students must:
  - Be between the ages of 5-19 by September 10<sup>th</sup>
  - Be identified as a “child with a disability” under IDEA
  - Have been enrolled in a Montana public school in the 2023-2024 school year and have been counted for ANB purposes
  - Be eligible to enter kindergarten
  - Be a new to Montana resident
- When applying for the program, the parent is asked to provide a current copy of the child’s IEP, evaluation report, or private place service plan from the school district to review.
- The Parent must provide two documents as proof of address, so we can verify that the student resides within that district.
- The next round of applications will be in May 2025 and November 2025 where we will be reviewing data from the 2024-2025 school year.



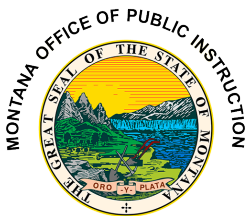
# District Student Amounts:

- District and student amounts for FY24 are located on our [ESA website](#) under “What do school districts need to know?”
- ESA students approved in May 2024 – Payments were split into 10 equal payments for the fiscal year.
- ESA students approved in November 2024 – Payments were split into 5 equal payments for the remainder of the fiscal year.
- Allocation amounts will be calculated each year and posted to the website.



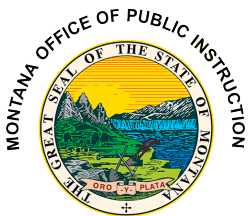
# Payment Schedule

- Districts will receive a monthly invoice from OPI following the distribution of the BASE aid payment.
  - The invoice will include the students and remit total.
  - Payments were split into 5 equal payments for the remainder of the fiscal year.
- Payments will need to be remitted back to the OPI by the 10<sup>th</sup> of each month.
- OPI will deposit the funds into the students trust account.
- The following fiscal year, new allocations will be awarded to each student and split into 10 equal payments.



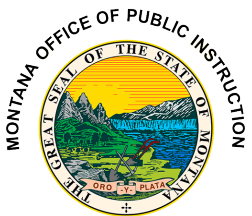
# School District Coding:

- Fund: X01 General Fund
  - Program Code: 999 Transfers to OPI
  - Function Code: 62XX Resource Transfers
  - Object Code: 950 Transfer to the OPI for the ESA Program
- 
- Monthly invoices will include the coding to remit the funds back to the Office of Public Instruction.



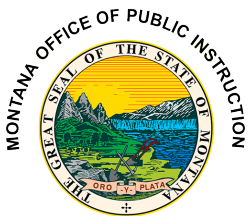
# What if the student is out of district or moved?

- The district the student was enrolled in for the prior year (2023-2024) will be responsible for remitting payments back to OPI during the 2024-2025 school year since they are currently receiving the ANB funding.
- The following year, the resident school district will be responsible for remitting payments back to OPI during the 2025-2026 school year.



# District Responsibilities:

- Ensure that OPI receives payment back by the 10<sup>th</sup> of the month to be deposited into the students trust account for reimbursements.
- If a student were to enroll back into public school, the district will need to notify OPI as soon as possible as this terminates the participation in ESA.
- Ensure ANB flag is set up in AIM.





# Office of Public Instruction's Responsibilities:

- Invoice districts monthly
- If a student is removed from ESA for any reason, the district will be notified
- Verify that expenditures submitted to OPI are for allowable educational expenses.

