

# [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.

- [Reimbursement Request Form](#)
- [Reimbursement Form Instructions](#)
- [List of Allowable Reimbursements](#)
- [Mileage Reimbursement Form](#)

Please read through the information provided on the first page of the reimbursement form.

1) Click the “**Start Reimbursement Form**” tab to begin.



## Education Savings Account Reimbursement Form

Welcome to the ESA program! The following reimbursement 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 information on eligible reimbursements, please review the [list of allowable reimbursements](#). This is available on the [ESA webpage](#) and page 8 of the [Parent Handbook](#). Please read through this list carefully before submitting reimbursement receipts to OPI.

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 purpose.

Upon receipt of the signed contract, parents of students enrolled in July may begin submitting receipts for allowable expenses incurred on or after July 1. For students enrolled in January, parents may submit receipts for expenses incurred on or after January 1.

To ensure timely processing, all reimbursement requests must be completed and submitted to OPI by the 25th of the month. Requests submitted by this deadline will be processed for payment by the end of the following month. *This timeline allows OPI to review all receipts for accuracy, request additional information as necessary, and verify that sufficient funding is available in the students trust account.*

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

[Start Reimbursement Form](#)

- 2) Enter student and parent information in the sections provided.
- This information should match what was provided on the original application.

Enter Student Information

First Name:

Last Name:

Birthdate (mm/dd/yyyy):

Enter Custodial Parent/Guardian Information

First Name:

Last Name:

Email:

- 3) Enter in the number of receipts that you will be uploading into the form for reimbursement.
- The number entered will populate the exact number of pages necessary to complete.

How many receipts will be uploaded today?

*The form will populate an upload section based on your response*

- 4) If you have mileage reimbursements to submit, click “Yes” on the last question.  
If you do not have mileage reimbursements to submit, click “No.”

Will you include a Mileage Reimbursement today?

*if yes, the mileage reimbursement form will populate after you have successfully uploaded allowable receipts*

Yes

No



- 5) Click the blue arrow at the bottom right of the page to continue to the next page.

6) If you clicked “Yes” to including mileage reimbursements, the below message will appear on the next screen. Fill out the number of mileage reimbursement claims you will be including.

- If you have multiple dates of travel to the same location, you only need to complete one request per location. The form will populate a reimbursement section based on your response.
- If you clicked “No” then you will be taken to the receipt upload section.

How many Mileage Reimbursement Claims will you be filling out today?  
*If you have multiple dates of travel to the same location, you only need to complete one request per location.*  
*The form will populate a reimbursement section based on your response*

[Input Field]

[←] [→]

**When completing the receipt upload form, make sure that your receipt includes vendor details, shipping information, the purchase date, and proof of payment for each item.**

7) Select or drop files into the upload section on the form.

Receipt Upload

Drop files or click here to upload

8) Include the amount that you are requesting for reimbursement.

9) Write a description of what the items you are requesting reimbursement are for.

- There is no character limit on this section, so please include as much information as possible.

Receipt Details

Reimbursement Amount

Description



10) Click the blue arrow at the bottom right to continue to the next page.

## Mileage Reimbursement Instructions

After you have completed all your receipt upload forms, you will be directed to the mileage reimbursement form if you clicked “Yes”.

Mileage reimbursement claims can be filled out if a parent transports their student to and from tutoring sessions, therapy appointments, or for other educational purposes. The state rate for mileage is 0.67 cents per mile. When completing the form, you will need to include starting and ending locations, the total miles traveled, date of travel, and the reason for travel. All mileage will be verified by OPI utilizing Map Quest.

**If you have multiple dates of travel to the same location, you only need to complete one request per location. This form will allow you to enter in all the dates that you traveled to this location.**

11) Enter in the dates traveled, starting and ending locations, the number of miles you traveled, and description of travel below:

Date(s) of Travel (mm/dd/yyyy)	<input type="text"/>
Starting Location Address (City, State, Zip):	<input type="text"/>
Ending Location Address (City, State, Zip):	<input type="text"/>
Number of Miles Traveled (round trip):	<input type="text"/>
Description of Travel:	<input type="text"/>

12) Enter in the total reimbursement amount you are requesting for mileage.

- To calculate, take the number of days you traveled, multiply by the total miles traveled per day, and multiply by the state rate of 0.67 cents.

Calculate the total reimbursement amount:

Total Reimbursement =  $D \times M \times 0.67$

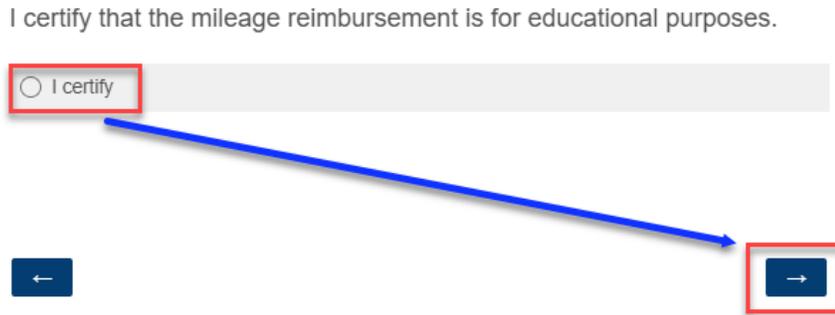
- D = Number of days traveled
- M = Miles traveled per day
- 0.67 = Mileage rate in dollars per mile

13) Click “I certify” that the mileage requested is for educational purposes.

I certify that the mileage reimbursement is for educational purposes.

I certify

← →



14) Click the blue arrow at the bottom right to continue to the next page.

- If you had more than one mileage reimbursement request to submit, another form will populate.
- If you need to adjust the form, you can always click the back arrow to return to previous pages on the form.

15) Lastly, certify all receipts uploaded are eligible purchases through the ESA program, and that your child is not currently enrolled in public school.

Today's Date

7/8/2024

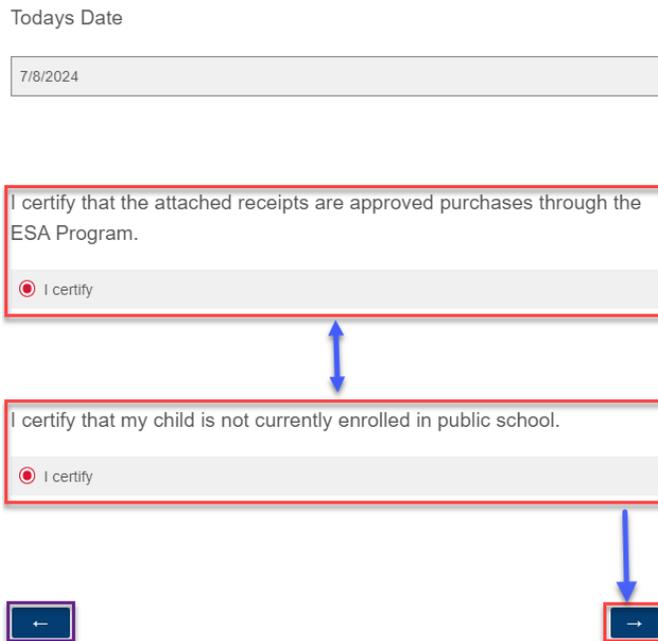
I certify that the attached receipts are approved purchases through the ESA Program.

I certify

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

I certify

← →



16) To submit the form to OPI, click the blue arrow. To go back and make changes to the previous pages, click the back arrow highlighted in purple below.

**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 25<sup>th</sup> of each month. Requests submitted by this deadline will be processed for payment by the end of the following month.**