

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](#)

- 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.

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.

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 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

<input type="text" value="7/8/2024"/>

I certify that the attached receipts are approved purchases through the ESA Program.
<input checked="" type="radio"/> I certify

I certify that my child is not currently enrolled in public school.
<input checked="" type="radio"/> 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 the [List of Allowable Reimbursements](#).

Fill in the reimbursement amount requested for each receipt and provide a description



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.

Information on eligible reimbursements can be located on the [ESA webpage](#) or by visiting page 8 of the [Parent Handbook](#). Please read through this list carefully before submitting reimbursement receipts to OPI.

To request transportation reimbursements for mileage, please complete this [Mileage Reimbursement Form](#). Upload the completed form in one of the receipt upload sections below.

If you have questions about a specific allowable item, contact Whitney Williams at opiesa@mt.gov.

Upload receipts in the file upload boxes below.

Note: Only one file per upload

Receipt #1 Upload

Drop files or click here to upload

Receipt #1 Details

Reimbursement Amount

Description

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.

The screenshot shows a form with the question "Do you have additional receipts to upload?" highlighted by a red box. Below the question are two radio button options: "Yes" (selected, also highlighted by a red box) and "No". A blue arrow points from the "Yes" option to a blue right-pointing arrow button at the bottom right, which is also highlighted by a red box. A blue left-pointing arrow button is visible at the bottom left.

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

Submit

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.