



ESA Newsletter April 2025

ESA Families,

The program has had a strong and impactful start, supporting Montana families as they engage in their children's educational journey. We are proud to currently support 46 students, building momentum for continued growth and success. As we approach the end of the program's first year, please take a moment to review the important information below regarding your students' trust account and preparations for the upcoming year.

Yearly Address Verification

The Office of Public Instruction (OPI) updates student records annually to ensure information is accurate for families participating in the Education Savings Account (ESA) program. To provide accurate reporting to your resident school district and ensure your student receives the correct allocation award, please complete the address verification form below. If your address has changed since enrollment into the ESA program, you will be required to upload two proof of residency documents. For a list of acceptable documents, please refer to [23-3-183, MCA](#).

When filling out the form, you will be asked to enter your resident school district, which is the public school district where your student lives and is entitled to attend based on where the parent resides. This information is essential for determining your student's allocation award for the upcoming school year. **All forms are due back to OPI by June 1, 2025.**

Link to form: [ESA Address Verification Form](#)

July Reimbursements

Please note that reimbursements will not be issued during the month of July 2025. This temporary pause is due to the fiscal year-end close-out with the state and the required accounting procedures that must take place during that time. Reimbursement requests submitted by May 25th will be processed after June 10th, with regular processing resuming after August 10th, 2025.

SY2025-2026 Allocations

The OPI is currently working to calculate awards for the upcoming 2025-2026 year. Parents will receive a notification letter with details about their student's award amount. Newly awarded funds will be available in the students trust accounts beginning in August, once the first round of deposits has been received from the resident school district. Families with remaining award funds from the previous 2024-2025 year may continue to submitting receipts throughout the summer. If a student's trust account has been fully expended, parents may still submit receipts; however, reimbursements will be held until additional funds are deposited into the account.

Reimbursements and Student Trust Account Deposits

The student trust accounts receive monthly deposits, which are received from the resident school district. Deposits are received September through June, and deposited into the students trust account monthly. By the end of June, students will have received the full allocation designated to their account. If reimbursement requests exceed the current balance in the account at the time of the request, the remaining balance will be paid out in the following month, after the new deposits have been received. Families who enrolled in the ESA program in July will receive 10 equally split deposits, and families that enrolled in January will receive 5 equally split deposits.

Reimbursement requests submitted by the 25th of the month will be applied to the available balance for reimbursement after the 10th of the following month. This is dependent upon the date that the deposit is received from the district and applied to the students' trust account.

Please see the attachment below for a list of allowable and unallowable expenses.



Allowable_Unallowable Expenses.pdf

Homeschool Registration

Students enrolled in the ESA program must be registered as homeschool students with their County Superintendent. This registration is required for accurate reporting and tracking with the Office of Public Instruction (OPI). It is the responsibility of the parent or guardian to notify their County Superintendent of intent to homeschool and to unenroll their student from their resident school district upon enrolling in the ESA program. For more information, please see § 20-5-102 and 20-5-109, MCA.

Private School Tuition

If a parent chooses to utilize the ESA funds for private school tuition, in accordance with [20-7-1708, MCA](#), the Office of Public Instruction is required to collect quarterly reports of services provided to the qualifying student under this program. To comply with this requirement, the private school must provide quarterly reports to OPI confirming the students' enrollment dates and services provided. If these reports are not received, the Office of Public Instruction may not be able to provide reimbursement to the parent(s) of the ESA student. The direct link where these quarterly reports can be submitted is now available on the [ESA Website](#) under the [Quarterly Report Submission Form](#).

Mileage Reimbursements

If a parent transports their student to and from tutoring sessions, therapy appointments, or for other educational purposes, they may be eligible for mileage reimbursement. Mileage will be reimbursed at the current state rate of 67 cents per mile. When completing the form, parents will be required to provide the starting and ending locations, the total miles traveled, the date of travel, and the reason for travel. The mileage submitted will be verified by OPI utilizing [MapQuest](#).

Parents will soon be able to submit mileage requests directly within the reimbursement form. This updated form is currently being developed, and parents will be notified and provided with instructions once it is available. In the meantime, please use the [mileage reimbursement form](#) located on the [ESA website](#).

Coming Soon! Mileage & Reimbursement Form Changes

OPI is in the process of updating the reimbursement form to include a section for mileage reimbursements directly within the form, eliminating the need to download and upload mileage separately. When launched, the new form will ask if you have mileage to report. If you select “yes,” a mileage section will automatically populate for you to complete after uploading receipts for other educational expenses. This update is designed to streamline the process and make submitting reimbursement requests more convenient. Once the updated form is ready, parents will be notified and provided with instructions on how to complete it.

Applications

OPI is preparing to open another round of Education Savings Account (ESA) applications, which will go live on the [ESA Website](#) May 1, 2025. Students who are not currently enrolled in the ESA program will have the opportunity for their application to be submitted for the ESA program from May 1, 2025, through June 1, 2025. Applications are not required for students currently enrolled in the ESA program. We look forward to welcoming new applicants and continuing the growth of this valuable program.

If you know someone who might benefit from this program, please share the ESA flyer below to help them learn more about the benefits.

[Education Savings Account Flyer](#)

Always keep your eye on our ESA website, as we will post updates and information for families.