# How to Submit a Reimbursement in EMA

You paid out of pocket for a product or service related to your student's educational journey. Now what? To submit a reimbursement request for your student, please follow these instructions:
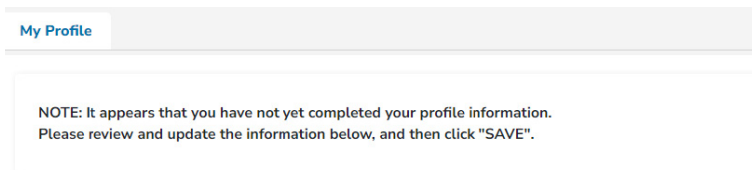
1. Log in to EMA.

2. When submitting a reimbursement for the first time, you will need to take the steps below to select your reimbursement payment method.

   a. **From your EMA dashboard, select the profile icon at the top right corner of the screen.**

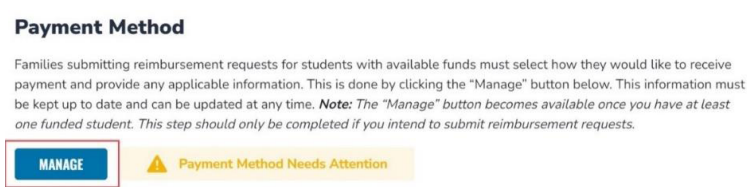   b. Select **EDIT PROFILE** from the popup window that displays.
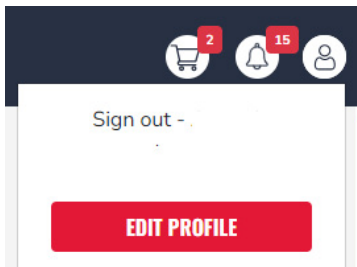
   c. The **Guardian Profile** screen displays (under the My Profile tab).

   d. Scroll down to the **Payment Method** section (middle of the page).

3. Read the agreement in the yellow box, select the checkbox to acknowledge you have read it, and then select **MANAGE**.

4. The **Payment Method** popup window displays.

5. On the **Payment Method** screen, your information populates from your EMA profile.

6. If all your personal information is correct, select **NEXT**.

7. Use the drop-down menu to select one of the three options for payment (ACH, Check, or PayPal):

- Direct deposit / ACH

Payment Method:	Direct Deposit / ACH ▾
Name on Account	
Bank Name	
Routing Code ⓘ	
Account Number	
Account Type	○ Checking ○ Savings

  o Complete the fields:
    i.   Name on Account
    ii.   Bank Name
    iii.   Routing Code
    iv.   Account Number
    v.   Account Type
            - Checking or
            - Savings

Note: To help keep your information secure, your banking information is not stored in EMA.

- Check

| Payment Method: | Check ▾ |

Checks are sent by post to the address below. Please allow 15 business days for the check to arrive.
Checks are for deposit only, and cannot be transferred.
The checks' currency will be as displayed above.

Currency	USD
Name on Check	
Address to Send Check	

  o Complete the fields:
    i.   Currency *(Please select USD for United States Dollars to receive payment in US currency)*
    ii.   Name on Check
    iii.   Address to Send Check

- PayPal

| Payment Method: | PayPal ▾ |

Fees listed at www.paypal.com may apply.

| Payment Currency | USD ▾ |
| Email Address | |

No transaction fees. FX fees: View tiers.

  o Complete the fields:
    i.   Payment Currency
    ii.   Email address

Note: FX fees (applied when a transaction involves foreign currency) may apply.

8. Next, select the **checkbox** to agree to the terms of Tipalti's Privacy Policy then select **Next**.

☑ I agree to the Terms of Service and Tipalti's Privacy Policy.

← Back   → Next →

9. You're all set! The green message (above **step 3**) populates when your payment method is complete.
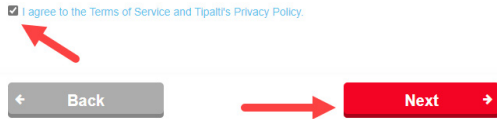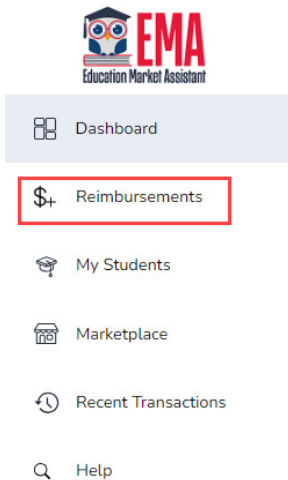
Payment Method

Families submitting reimbursement requests for students with available funds must select how they would like to receive payment and provide any applicable information. This is done by clicking the "Manage" button below. This information must be kept up to date and can be updated at any time. **Note:** The "Manage" button becomes available once you have at least one funded student. This step should only be completed if you intend to submit reimbursement requests.
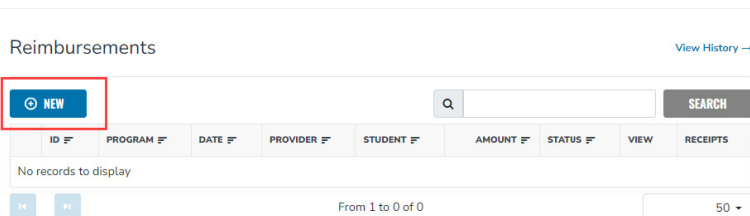
MANAGE   ✓✓ Payment Method Connected

Note: It may take up to 12 hours for this change to be reflected in your EMA account. If you continue to see the "Payment Method Needs Attention" message after updating your payment method, please log out, open a new window, and log back in.
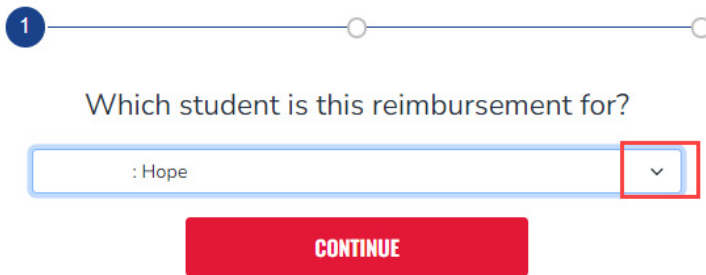
10. To return to your reimbursement request, select **Reimbursements** from the left panel of the Dashboard.

EMA
Education Market Assistant

⊞ Dashboard

$₊ Reimbursements

🎓 My Students

🏬 Marketplace

🕐 Recent Transactions

🔍 Help

11. From the **Reimbursements** screen, select **NEW**.

Reimbursements   View History →

⊕ NEW   🔍 [   ]   SEARCH

ID ⌐ PROGRAM ⌐ DATE ⌐ PROVIDER ⌐ STUDENT ⌐ AMOUNT ⌐ STATUS ⌐ VIEW RECEIPTS

No records to display

|◄ ►| From 1 to 0 of 0   50 ▾
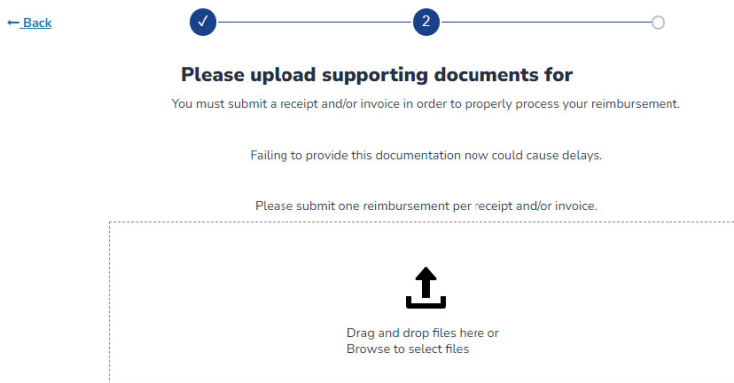
12. From the dropdown menu, select a student, and then select **CONTINUE**.

13. Drag-and-drop a file onto the ⬆ icon to upload the invoice statement, proof of payment, or receipt for the student selected.
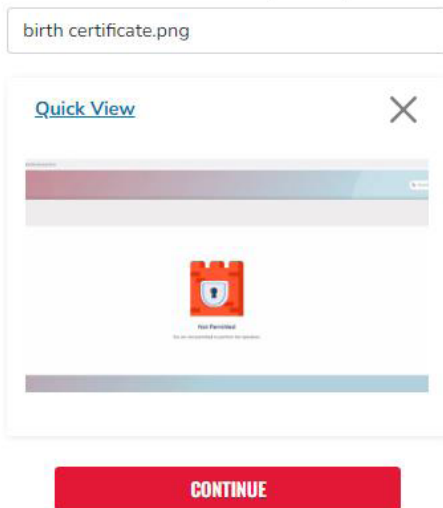

Note 1: File must be a png, jpg or PDF.
Note 2: Select the ⬆ icon to browse for documents, which may be added later (see below).

a. Use **Quick View** to review your document. Select **CONTINUE**.

14. Select **CONTINUE** on the **Next, you'll enter information for your Receipt**... screen.

15. The required information screen displays.

   a. Complete the **required fields** for each item.

   - Purchase Date
   - Invoice #
   - Category (*Scholarship funds can be spent on the categories listed in the dropdown menu, shown below. Please select the appropriate category below. If you are unsure, please reference the Parent Handbook available in the Help section to review the list of qualifying expenses for the Program.*)

   - Amount
   - Service Provider Name
   - Educational Benefit (*Please include a brief description of how this item or service is meeting the educational needs of your student.*)

   b. If necessary, add attach additional documents in the space that populates for some category types near the bottom of this screen.

Note: When requesting a reimbursement, you must provide official documentation/receipts from the educational service provider that clearly shows the Student's name, qualifying educational expenses, and the amount of each expense, along with the amount paid and payment dates. You must attach detailed, itemized receipts, or invoices that reflect the educational expenses. A bank statement alone, without any of the other criteria above, is not sufficient support for a reimbursement request.

c. To add another item to the reimbursement request select **ADD ITEM**. When all items are added and fields are complete, select **DONE**.
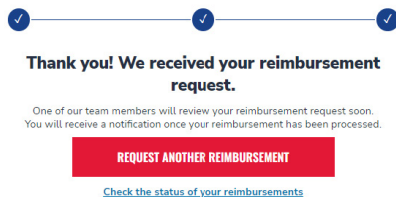
Note 1: Select **Download** to review the primary document or receipt uploaded to the reimbursement.
Note 2: Select **Back** to go back and make any edits necessary.

16. The review screen displays. Select **SUBMIT FOR APPROVAL** to complete the reimbursement request.
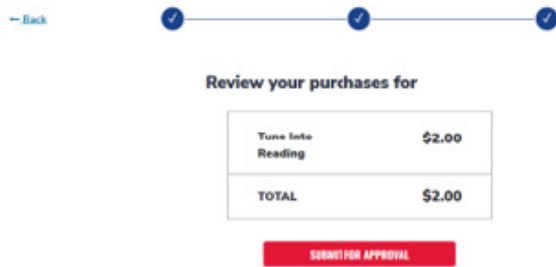
17. You will see the screen below after submitting your reimbursement request.

Note: If your requested amount exceeds the balance in your student's account, an onscreen error will appear as shown below. The screen will refresh and will go back to the request form so you can adjust the amount. When you adjust the amount, please add a comment explaining the requested amount no longer ties to the attached documentation because the reimbursement was capped at the amount of available funding.