

How to Submit a Reimbursement in EMA

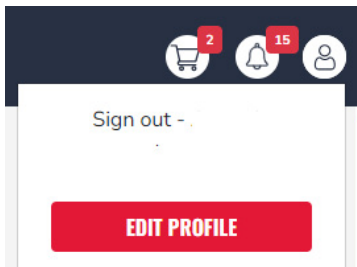


You paid out of pocket for a product or service related to your student's educational journey. Now what? To submit a reimbursement request for your student, please follow these instructions:

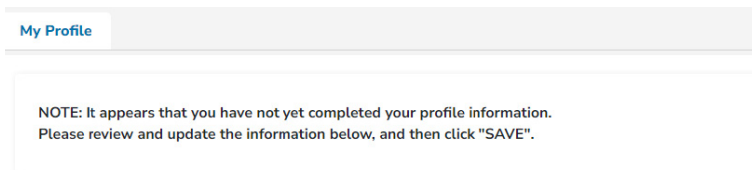
1. Log in to [EMA](#).
2. When submitting a reimbursement for the first time, you will need to take the steps below to select your reimbursement payment method.
 - a. From your EMA dashboard, select the profile icon at the top right corner of the screen.



- b. Select **EDIT PROFILE** from the popup window that displays.



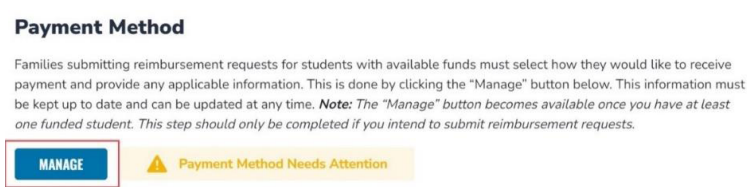
- c. The **Guardian Profile** screen displays (under the My Profile tab).



Guardian Profile

Please confirm that all profile information is accurate. This data will also be used to complete your applications.

- 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**.

Payment Method


I, as Guardian to a student receiving HOPE Scholarship funding, understand that payment processing for this Agreement operates through a third-party software owned and operated by Tipalti Inc. ("Tipalti"). Through acceptance of this Agreement, I will be presented with the terms and conditions of use of Tipalti's platform and services pursuant to its "Payee Agreement." I consent to the jurisdiction of West Virginia courts and when presented with this Payee Agreement, I understand and agree to the modification of the section therein entitled "Contracting Entity, Governing Law, and Venue" to implement following language ("the Addendum"):

6. CONTRACTING ENTITY, GOVERNING LAW, AND VENUE - The agreement shall be governed exclusively by the laws of the State of West Virginia. Any dispute shall take place with venue in the appropriate West Virginia state or federal court. This provision replaces any references to any other State's governing law or any previous choice of venue provisions.

For the avoidance of doubt, any language purporting to stipulate that California laws will apply to this Addendum or the Payee Agreement, or that any disputes in relation to the same are to take place in California courts, shall be amended to replace "California" with "West Virginia."

In the event of conflict between this addendum and the Payee Agreement, the terms of this addendum shall control.


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 in accordance with the Hope Scholarship Board's Reimbursement Policy.


MANAGE  Payment Method Needs Attention


4. The **Payment Method** popup window displays.
5. On the **Payment Method** screen, your information populates from your EMA profile.


Payment Method

Contact Email _____

Phone Number  _____

First Name  _____

Middle Name  _____

Last Name  _____

Street Address _____

Address 2 _____


City _____

Country United States

State WV

ZIP 26711


Edit

Next 

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):

Payment Method Powered by tipalti

1 2 3
Address Payment Method Done

Payment Method: Direct Deposit / ACH 

- Direct deposit / ACH

Payment Method:

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:

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

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:

Fees listed at www.paypal.com may apply.

Payment Currency

Email Address

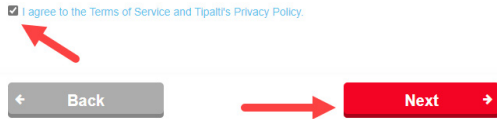
No transaction fees. FX fees: [View fees](#).

- 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**.



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

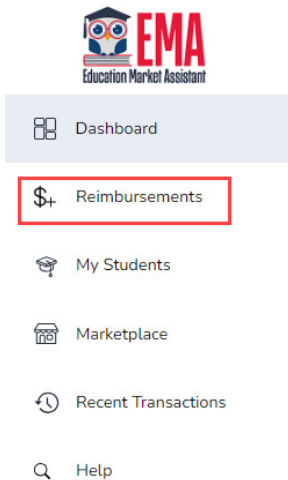
Payment Method

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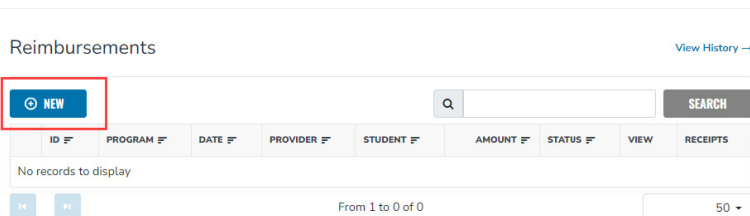


Note: It may take up to 12 hours for this change to be reflected in your EMA account. If you continue to see the "Payment Method Needs Attention" message after updating your payment method, please log out, open a new window, and log back in.

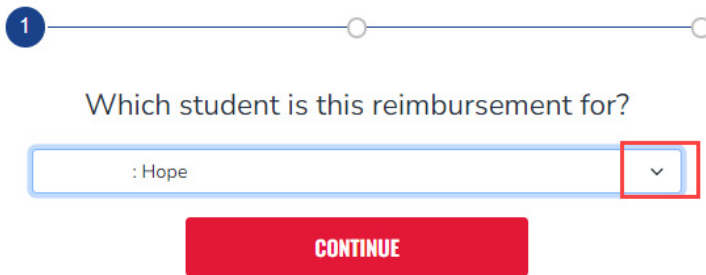
10. To return to your reimbursement request, select **Reimbursements** from the left panel of the Dashboard.




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

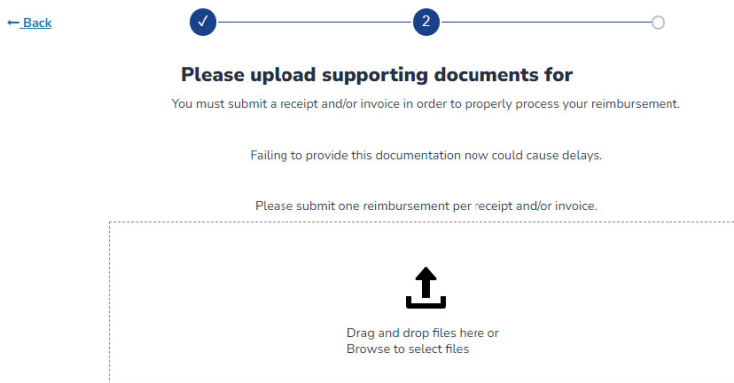


12. From the dropdown menu, select a student, and then select **CONTINUE**.



A progress bar at the top shows step 1 as the active step. Below it, the text reads "Which student is this reimbursement for?". A text input field contains the name ": Hope" and a dropdown arrow icon. A red box highlights the dropdown arrow. Below the input field is a red button labeled "CONTINUE".

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



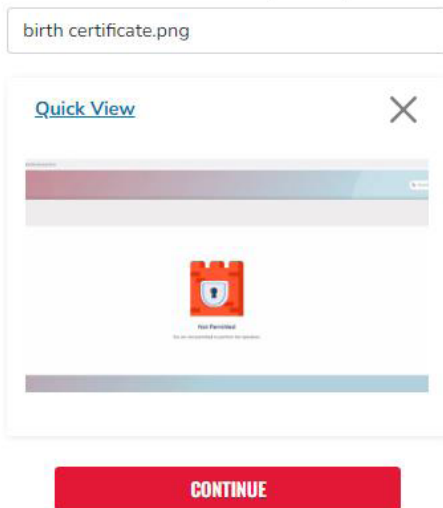
A progress bar at the top shows step 2 as the active step. A "Back" link is on the left. The main heading is "Please upload supporting documents for" followed by the instruction "You must submit a receipt and/or invoice in order to properly process your reimbursement." Below this, it says "Failing to provide this documentation now could cause delays." and "Please submit one reimbursement per receipt and/or invoice." A large dashed box contains an upload icon and the text "Drag and drop files here or Browse to select files".

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**.

Please submit one reimbursement per receipt and/or invoice.



A text input field contains the filename "birth certificate.png". Below it is a "Quick View" window with a close button. The window shows a preview of a document with a red "Not Permitted" error message. Below the preview is a red button labeled "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.

Please enter the requested information below

Providing accurate details now, ensures no delays occur while processing reimbursements.

Please use "Add Item" for each line item of your receipt/invoice.

microsoftteams-image (28).png [Quick View](#)

ITEM 1

Purchase Date:

Invoice #:

Category:

Amount:

Service Provider Name:

Educational Benefit:

ADD ITEM

DONE

- 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.)

Educational Svcs., Other
Instructional Material/Curriculum
Tutoring
Therapy

- 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.

Attach Additional Documents

You may attach any additional supporting documentation for this reimbursement at this time which includes proof of payment.

Drag and drop files here or
Browse to select files

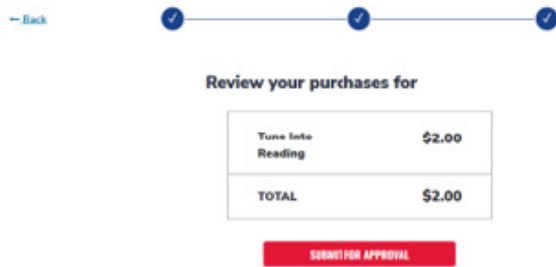
Note: When requesting a reimbursement, you must provide official documentation/receipts from the educational service provider that clearly shows the Student's name, qualifying educational expenses, and the amount of each expense, along with the amount paid and payment dates. You must attach detailed, 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**.

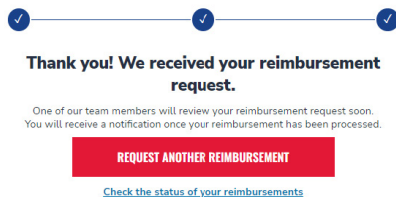
Note 1: Select **Download** to review the primary document or receipt uploaded to the reimbursement.

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.

