



## Tip Sheet: Top Things to Remember for Refunds

If a spouse is entitled to money back from a MyCAA payment, then the GPC attached to the original invoice must be refunded. Please keep in mind the following:

- Refunds should NOT be given directly to spouses.
- The funds will be returned manually to the spouse's MyCAA account by the billing team.
- MyCAA does not accept any other type of refund (e.g., checks or school credit).

### How to process a refund to the MyCAA Government Purchase Card (GPC/MASTERCARD)

1. Log in to [AI Portal](#) and locate the original invoice and authorization letter. Only refund the card that was originally charged.
2. Apply the credit using your merchant credit card processing system.
3. Submit the refund information to MyCAA using the following steps:
  - Log in to [AI Portal](#)
  - Click 'Online Services' at the top of the page. When the drop down box appears, click 'Submit Refund'
  - When asked to choose a system, click 'MyCAA'
  - Locate the invoice that includes the enrollment(s) you are refunding. Select the invoice by clicking the blue magnifying glass on the right.
  - Select the enrollment to be refunded by clicking its blue icon on the right.
  - When prompted, input the refund amount and any remarks. When finished, click 'Add'.
  - Click 'Select File' to upload a copy of the refund receipt.
  - Click 'Submit' to complete the refund process.

### POC access to AI Portal

- Users must have invoice and/or finance tech permissions in the portal.
- Contact the school's user account controller (or UAC) or AI Portal technical support team at [aiportal@bamtech.net](mailto:aiportal@bamtech.net) to get permissions.

