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## Contact Us

The Step Up Service Center is available Monday through Friday from 8:00 a.m.– 5:00 p.m. ET. Parents/guardians who have questions or need assistance can contact Step Up via chat at [StepUpForStudents.org](https://StepUpForStudents.org), call (877) 735-7837, or email [Info@SUFS.org](mailto:Info@SUFS.org).

## Overview

Step Up For Students is a state-approved, nonprofit Scholarship Funding Organization (SFO) that empowers families to pursue and engage in the most appropriate learning options for their children.

Step Up For Students administers Florida’s school choice programs. These programs include the Family Empowerment Scholarship for Educational Opportunities (FES-EO), the Family Empowerment Scholarship for Students with Unique Abilities (FES-UA), the Florida Tax Credit Scholarship Program (FTC), the Hope Scholarship for students who are bullied or are victims of violence in a public school, and the New Worlds Scholarship Accounts Program for public school students in kindergarten through fifth grades who struggle with math and/or reading.

On July 1, 2023, the state of Florida expanded educational choice programs to all K-12 Florida students with the conversion of the FES-EO and the FTC Scholarship Program into educational savings accounts (ESAs). With this expansion also came the Personalized Education Program (PEP). Beginning with the 2023-24 school year, every Florida resident student eligible to enroll in a public K-12 school may receive a school choice scholarship to utilize in one of the following ways:

- **Private School Option (with ESA):** Enrollment in an eligible participating private school [s. 1002.395](#)
- **Transportation Option:** Transportation to a public school, including magnet or charter school, other than the school that the student is assigned to [s. 1002.394 \(4\)](#)
- **Personalized Education Program (PEP) Option ESA:** A “Personalized Education Program” means the sequentially progressive instruction of a student directed by his or her parent/guardian in order to satisfy the attendance requirements of ss. [1003.01 \(13\)](#), and [1003.21 \(1\)](#) while registered with an eligible nonprofit scholarship funding organization pursuant to s. 1002.395. PEP students are a subset of the Florida Tax Credit (FTC) Scholarship Program and participation is limited to 20,000 PEP students for the 2023-24 school year as outlined in [HB 1](#).

This handbook focuses on the FES-EO and FTC scholarships, including the PEP and Transportation option programs.



## **Scholarship Eligibility and Application**

### **Eligibility Requirements**

Contingent upon available funds, and on a first come, first-served basis, a student must meet the eligibility criteria and household income requirements to qualify for FES-EO/FTC.

#### **Student Eligibility Criteria**

- The student is a resident of the state of Florida.
- The student is eligible to enroll in grades K–12 in a public school in the state of Florida.
  - A student entering kindergarten must be 5 years old on or before September 1 of the applying school year.
  - A student entering first grade must be 6 years old on or before September 1 of the applying school year.
- The student is not enrolled in full-time Florida public school (including the Florida School for the Deaf and the Blind, the College-Preparatory Boarding Academy, or a charter school), a school providing education to youth in Department of Juvenile Justice programs, or a virtual school (including FLVS), correspondence school, or distance learning program that receives state funding.
- The student is not participating in any other scholarship, including FES-UA, Hope, or New Worlds Scholarship Accounts programs, whether administered by Step Up For Students or another SFO.

Families awarded more than one scholarship must indicate to Step Up the scholarship they intend to utilize for the school year and decline the scholarship they will not utilize. A student may utilize only one scholarship. To decline the FES-EO/FTC scholarship, complete [this survey](#).

#### **Program Priority**

Scholarships are awarded to eligible students in the following priority order:

- Tier 1 Priority: Students whose families have a household income up to 185% of Federal Poverty Level by household size, or students who are in foster or out-of-home care,
- Tier 2 Priority: Students whose families have a household income of between 186% and 400% of Federal Poverty Level by household size.
- No Priority: Students whose families have a household income of greater than 400% of Federal Poverty Level by household size, or students whose families do not wish to be considered for application priority.

Household members include anyone who permanently resides at the residence.



Persons in family/household	Priority 1 >185%	Priority 2 185%-400%
1	Up to \$26,973	Up to \$58,320
2	\$36,482	\$78,880
3	\$45,991	\$99,440
4	\$55,500	\$120,000
5	\$65,009	\$140,560
6	\$74,518	\$161,120
7	\$84,027	\$181,680
8	\$93,536	\$202,240
9	\$103,045	\$222,800
10	\$112,554	\$243,360
11	\$122,063	\$263,920
	Each additional member +\$9,509	Each additional member +\$20,560

Examples of proof of income include:

- Paychecks
- Cash wages
- Unemployment benefits
- Social Security
- Income/disability for every household member (including children)
- Child support
- Any other income

Any misrepresentation of the information provided to Step Up For Students for eligibility purposes will result in the revocation of the student's scholarship and could be punishable as a crime.

Families may choose to decline to provide income documentation and may instead provide a [Form 1070 – Statement of Nonpriority Form](#). In submitting this form in lieu of income documentation, the applicant understands they will be processed as a non-priority income and will be reported as a household with an income of greater than 400% of the federal poverty level by household size.

Prohibitions: An owner, operator, superintendent, or principal of an eligible private school or a person with equivalent decision-making authority over an eligible private school does not qualify for an FTC scholarship. However, they may qualify for FES-EO if they meet the requirements.

### **Scholarship Continuity**

Once a student qualifies for a scholarship, as long as the student is a resident of Florida and eligible to enroll in a Florida public school, the student remains eligible for the scholarship until



they return to public school, graduate high school, or turn 21, whichever occurs first, regardless of income.

## Student Categories

Eligible students will fall into one of the following categories:

- **Renewal:** Student who utilized scholarship funding in the prior school year.
  - Renewal students are not subject to income prioritization after their initial eligibility year. Students must renew each year they wish to remain in the program.
- **New:** Student who did not utilize scholarship funds in the prior year.

## Apply for a Scholarship

Families apply online [here](#) or use the [how-to guide](#) to assist with the application. For new families, [use this guide](#) to help create a parent/guardian account on the EMA platform. [Click here](#) for a helpful checklist for applications. There is no fee to apply.

Applications are processed on a first-come, first-served basis in the order all documents are received, and in accordance with statutory application priority.

Parents/guardians may apply or check the status of their application via their secured login on the Step Up For Students website. **The contact information provided by the parent/guardian during the application process MUST belong to the parents/guardians on the application.** Once a student is awarded, the parent/guardian will be able to access their student's award number via their secured login.

**Please note: A participating school or provider may not apply on behalf of a parent/guardian, submit documentation, or otherwise act on behalf of the parent/guardian. Schools or providers MUST NOT request access to or obtain the parent/guardian information to access the student's scholarship account. Doing so may result in loss of provider participation and/or scholarship eligibility and funding for the student and may carry financial or criminal penalty for the school or provider.**

[Click Here](#) for more information on eligibility.

## Choosing a Program

All scholarship awards default to an eligible private school award. Upon Award Notification, the family may choose to pursue the Transportation or PEP scholarship options. If interested in one of these options, a parent/guardian should indicate their interest using the form provided in their Award Notification email as soon as possible. PEP has a capacity limit of 20,000 students for the 2023-24 school year. In the event interest exceeds program capacity, students will be moved into PEP based on household income priority.



## Scholarship Amounts

The Florida Tax Credit Scholarship and Family Empowerment Scholarship (FES) maximum allowable award amounts are based on the county of residence and grade of the student for the eligible private school and PEP scholarship programs, and the county of residence for the student for the Transportation option.

[Click here](#) to view 2023-24 private school and PEP scholarship award amounts.

[Click here](#) to view 2023-24 Transportation option award amounts.

## Prorated Awards

The student's funding is based on the **latest** of the following three factors:

- Date of the student's scholarship award,
- Student's first day of attendance at the school, or
- Date the school became compliant with the Florida Department of Education (DOE)

## Scholarship Funding

Scholarship funding is deposited into the student scholarship account four times a year for the Private School and PEP options, and at least twice a year for the Transportation option.

Scholarship funds for Private School and PEP students will be deposited into the student's scholarship account on or around the following dates:

- Quarter 1: August 15 – September 15
- Quarter 2: November 15 – December 1
- Quarter 3: January 15 – February 1
- Quarter 4: April 15 – May 1

After funds have arrived, families will be notified by email. For students utilizing the private school option, each quarter's funds will first be committed to the private school tuition and fees.

**Please note:** The above dates are for the Private School and PEP options are for regularly scheduled funding distributions for the FES-EO/FTC programs. Students who miss a regularly scheduled distribution may be paid in a supplemental payment.

Scholarship funds for Transportation option students are distributed at least twice a year and may depend on when scholarship funds are received.

## What is Covered?

The Florida Tax Credit Scholarship and the Family Empowerment Scholarship offer three options for eligible students: Transportation option, Private School option ESA, and FTC-PEP option ESA.





## Transportation Option

If the option to transport the student to a public school other than the student is assigned to is selected, the parent/guardian may receive the greater of \$750 or the value of the local school district's per-pupil expenditure on transportation, to assist with the cost of transportation to a school other than the one the student is assigned to.

If awarded a scholarship and the student meets the requirements above, the parent or guardian can complete the Transportation option interest form linked in the student's scholarship Award Notification.

[Click here](#) for detailed information about awards.

Parents/guardians will need to upload a report card or progress report from the student's school on a quarterly basis through their [EMA portal](#) to receive payment.

## Personalized Education Program (PEP) Option

Beginning with the 2023-24 school year, scholarship students may choose to participate in the Personalized Education Program (PEP).

"Personalized Education Program" means the sequentially progressive instruction of a student directed by his or her parent/guardian in order to satisfy the attendance requirements of ss. [1003.01 \(13\)](#), and [1003.21 \(1\)](#) while registered with an eligible nonprofit Scholarship Funding Organization (SFO) pursuant to s. [1002.395](#).

PEP is an educational opportunity under the Florida Tax Credit Scholarship Program. PEP scholarship funds may be used to pay tuition and fees for programs, courses, or classes offered to PEP students. These services must be part of the student's sequential instruction per the definition of a PEP student.

"Parent" is either or both parents of a student, any parent/guardian of a student, any person in a parental relationship to a student, or any person exercising supervisory authority over a student in place of the parent (s. [1000.21\(5\)](#)).

PEP students must meet the following requirements:

- Declare a grade level, which is used to determine student eligibility and scholarship values.
- Submit a Student Learning Plan (SLP) annually. The SLP is available to parents/guardians within their EMA dashboard. This must be submitted prior to receiving PEP funding. Parents/guardians develop this customized learning plan to guide instruction for their students and address the services needed to fulfill their child's academic needs. It does not determine what a parent/guardian can purchase with scholarship funds. [Click here](#) to learn more about the SLP.



- Take a state-approved national norm-referenced test, and provide those results to the Step Up For Students prior to scholarship renewal for the 2024-25 school year, and each year annually so long as the student remains a PEP student.
- Withdraw as a full-time public or private school student or terminate a home education program with their school district and enroll as a PEP student with Step Up For Students.

**Please note:** PEP students may not enroll full-time at an eligible private school through the EMA portal. PEP students may participate in part-time enrollment at an eligible private school as a PEP/non-private school student and may be billed by the private school through the Provider Marketplace or may pay out of pocket to the school and submit a reimbursement request.

PEP students may not be enrolled in any private school, regardless of scholarship program eligibility or participation, and reported for attendance by the school to the DOE. Students enrolled in any private school program are ineligible for the PEP scholarship.

[Click here](#) for detailed information about an award status.

### Eligible Private School Option

All FES-EO/FTC recipients not registered in the PEP or Transportation option programs will be required to enroll in an eligible private school using EMA. Students utilizing the eligible private school option must be full-time private school students and must be educated full-time, onsite at the school's physical location. The school will initiate student enrollment and the parent/guardian will confirm enrollment.

Once a student has been approved for the scholarship, the next step is to select an eligible, participating private school. [Click here](#) to find private schools that accept FES-EO or FTC.

Once a private school has been selected, the parent/guardian should provide the student's Award ID to the selected private school. The Award ID is available to the parents/guardians under the My Students tab in the EMA portal. The selected private school will use the Award ID to enroll the student in the EMA platform. The parent/guardian will then be asked to confirm enrollment.

**Please note:** Enrollment is not complete until the parent/guardian has confirmed the enrollment, and the school cannot receive any payment of scholarship funds until enrollment is complete. [Click here](#) for detailed information about award statuses.

During enrollment, the school and parent/guardian must both certify the agreed-upon tuition and fee rate for that student. The agreed-upon tuition and fee rate for the student may include discounts or other considerations and may be less than the school's published tuition & fee rate for the student's grade level but may not be less than \$4.



Step Up will commit the total amount of tuition & fees for the student and bill them quarterly before a parent/guardian can access any remaining funds for other eligible expenses. Should a non-PEP student unenroll from an eligible private school at any time during the school year, they will be unable to access any funds for other eligible expenses. To access any non-committed ESA funds for other eligible expenses, the student must be enrolled again with an eligible private school, with an agreed-upon tuition and fees rate.

The agreed upon amount of tuition and fees for each student should not exceed any contractual agreement between the parent/guardian and the eligible private school.

Schools participating in the scholarship program may not charge a different rate for scholarship students. The same published tuition schedule must apply to all students, whether they are on scholarships or paying privately. Likewise, Step Up For Students may not pay for fees not included on the published fee schedule provided to all prospective parents/guardians.

Many eligible, participating private schools charge more than the value of the scholarship. In some cases, eligible, participating private schools may decide to provide scholarship students with supplemental financial assistance at their own discretion. Parents/guardians should work with the school but may be required to pay the difference between the value of the scholarship and the full tuition and fees.

Keep in mind if a student is enrolled before an application has been received or prior to being found eligible the parent/guardian will be responsible for paying any tuition and fees due to the school. Awards are not guaranteed and are on a first-come, first-served basis.

## Transferring Schools

One of the benefits of FTC and FES-EO are they can be transferred. If a parent/guardian is not satisfied with the eligible, participating private school they have chosen, they may find another one.

Before a parent/guardian withdraws their student from the private school, they should notify the school and understand the school's policy regarding transferring to another school.

Step Up For Students will not transfer a scholarship until it has confirmation of the student's withdrawal from the school and notification from the new eligible, participating private school of the student's start date.

The transfer process may include a final payment to the private school the student is leaving. If a payment is owed to that school, it must be approved by the parent/guardian. If the school has been overpaid, the school will be invoiced for the overpayment.

Once a student is enrolled and attending a school for 10 or more days during a quarterly payment period, that school will receive the full quarter's distribution. If a student transfers to a different participating school in the same quarter, the first school the student attended for 10



days or more in the quarterly payment period will receive the full quarter's payment. It is acceptable for the parent/guardian and the two schools to negotiate any amount owed to the new school from the quarterly payment made to the first school by Step Up For Students. This is not required, but, in the spirit of partnership for the good of the student, is highly recommended.

Allow five business days for the current school to withdraw the student. If the student has not been withdrawn after five business days, [contact Customer Support](#) at Step Up For Students.

## Eligible ESA Expenses

Below is a list of statutory eligible expenses under the Private School and PEP education savings account programs. For additional detail about the eligible expense categories, please refer to the [FES-EO/FTC Purchasing Guide](#).

- Tuition and fees
  - Eligible private school
  - Home education instructional program (for PEP students only)
  - Eligible postsecondary institution
  - Approved preapprenticeship program
  - Fees for part-time tutoring or Choice Navigator services
  - Full-time private tutoring program (for PEP students only)
  - Approved online or virtual provider
  - Private-pay student for Florida Virtual School
  - Contracted services provider by a public school or school district
- Instructional materials
- Curriculum
- Standardized testing fees
- Contracted services provided by a public school or school district

## Eligible Private School Payment Eligibility

After a student has been awarded a scholarship and the parent/guardian provides the award ID to the school, the school must enroll the student through EMA portal, and the parent/guardian must confirm enrollment in their EMA account. For the student to be eligible for a quarterly payment to an eligible private school, the school and parent must complete this process by the following dates:

- For Quarter 1, a student must be enrolled through the EMA platform at least 30 days before the quarterly payment, which is August 1 or after 75% of FTC funds have been obligated.
- November 1, enrollment deadline is October 1
- February 1, enrollment deadline is January 1



- April 1, enrollment deadline is March 1

As a reminder, once a student is enrolled and attending a school for 10 or more days during a quarterly payment period, that school will receive the full quarter's distribution. If a student transfers to a different participating school in the same quarter, the first school the student attended for 10 days or more in the quarterly payment period will receive the full quarter's payment. It is acceptable for the parent/guardian and the two schools to negotiate any amount owed to the new school from the quarterly payment made to the first school by Step Up For Students. This is not required, but, in the spirit of partnership and for the good of the student, it is highly recommended.

## **Pre-Authorization**

Many items and services have been pre-approved as authorized uses of scholarship funds. These items or services fall into different categories, such as instructional material, curriculum, and services. The first step for a parent/guardian in using scholarship funds is familiarizing themselves with the types of items and services listed as eligible expenses in the program [FES-EO/FTC Purchasing Guide](#). Items on MyScholarShop are pre-approved by program.

If the item or service is not available on MyScholarShop or identified as eligible in the Purchasing Guide or is indicated to require a pre-authorization, the pre-authorization must be submitted **before** purchasing the item or service. The pre-authorization is for the item or service only and is based on the rules at the time of approval. The pre-authorization is not confirmation of a provider's participation or the funding available for the reimbursement. A pre-authorization will require supporting documentation and an explanation of how the item is in an eligible expense category and will meet the individual educational needs of the student and/or will allow the student to access instruction or instructional content. In other words, parents/guardians will need to demonstrate how the item or service is an eligible expense that helps their student learn.

The pre-authorization should be specific to the student and contain as much detail about the specific item or service being requested, including the approximate cost of the item or service. If approved, the items or services submitted on the reimbursement that corresponds to the pre-authorization should match those on the pre-authorization. If they do not, Step Up For Students reserves the right to deny the reimbursement request.

Approval of pre-authorization requests are made on a case-by-case basis relevant to the circumstances of the individual student. An approved pre-authorization is valid for purchases in the school year in which it was approved.

**Please note:** Pre-authorizations for approved items or services will be denied.



## Submitting Pre-Authorization Requests

Pre-authorizations may be submitted through the EMA portal once a student's account has been funded. The pre-authorization request will be reviewed in the order it was received, and a notification of the outcome will be sent via email. **If the pre-authorization is approved, once the parent/guardian has purchased the item or service, they may submit a reimbursement request in the parent/guardian portal.**

Pre-authorizations may be submitted until April 30, 2024. This will ensure pre-authorizations have time to be approved and parents have time to make the purchase and submit a reimbursement request prior to the end of the school year on June 30, 2024.

## Submitting Reimbursement Requests

Families and providers may elect to participate in direct payment, or the parent/guardian may also pay for eligible expenses such as tuition and fees, tutoring, services, and/or goods out of pocket, and submit a reimbursement request.

Reimbursements will require parents/guardians to provide certain information to Step Up For Students so funds can be disbursed from the student's scholarship account for eligible expenses paid out of pocket.

The information available behind the parent/guardian login is confidential and personal. A parent/guardian may not assign the responsibility for submission of any reimbursement documentation to another user. DO NOT provide anyone, especially service providers or personnel at a private school, with access to a student's scholarship account by providing a username and password.

Doing so may result in loss of scholarship eligibility and funding, future eligibility, or financial or criminal penalties.

Reimbursement requests are year-specific. Unused funds from a prior year will roll forward into the current school year's balance. Requests for reimbursements for items or services purchased between July 1, 2023, and June 30, 2024, must be submitted by July 31, 2024, to be approved.

**Please note:** Allow up to 60 days for a reimbursement request with required supporting documentation to be fully reviewed.

## Submitting a Reimbursement Request – Required Supporting Documentation

When submitting reimbursement requests, the parent/guardian will be required to submit documentation supporting the purchase of the item or service and proof of the method of payment. Reimbursement requests must include an original, unaltered receipt or invoice from the vendor or provider. The type of information required may differ from one category of



reimbursement to another. An invoice or statement marked “PAID” or showing a zero balance will not be accepted as proof of payment. Reimbursement requests placed ON HOLD for additional documents longer than 30 days will be denied and will require resubmission.

### Proof of Payment

Proof of payment will be required for any reimbursement request where the payee is the parent/guardian. Proof of payment can be any of the below:

- Credit card receipt with the full transaction date (mm/dd/yy), payee name, and amount.
- Credit card/bank statement with the full transaction date (mm/dd/yy), payee name, and amount.
- PayPal receipt with the full purchase date (mm/dd/yy), payee name, amount, and funding source.
- Copy of the front and back of the cleared check with the full payment date (mm/dd/yy), payee name, and amount.
- FACTS statement with the school’s name, student’s first and last name, description of each payment to be reimbursed (i.e., tuition, registration, etc.), full payment dates (mm/dd/yy), and amounts.
  - This information can be found on the FACTS mobile website under Payment Plan & Billing – Transactions.
  - Include the individual payment details specific to the student and current reimbursement request.
- Cash payments to a provider require a signed, dated letter from **the provider** on their letterhead including the provider’s name, student’s first and last name, description service (i.e., tuition, registration, etc.), full payment dates (mm/dd/yy), amounts, and payment method (i.e., cash)
  - Requests for reimbursement of cash purchases from private sellers, not affiliated with a company, (i.e., garage sale, Craigslist, private tutors, private therapists, etc.) will be denied.
  - When making purchases from private sellers, payment in the form of a personal or cashier’s check, money order, PayPal, Venmo or other electronic payment method is REQUIRED. This form of payment provides verification of the purchase, which is required for reimbursement.

**Please note:** Purchases made using reward/loyalty points or credits are not eligible for reimbursement. For purchases discounted by use of reward/loyalty points or credits, only the actual paid portion is eligible for reimbursement.

If the payee’s name on the proof of payment does not match the provider listed on the invoice or receipt, supporting documentation will be required to explain the difference by the provider (this can be in the form of a letter).



**Step Up For Students staff may request additional documentation or clarification when the reimbursement request is reviewed. The parent/guardian will be notified via email to the email address associated with their account.**

### **Instructional Materials and Curriculum**

Invoice or receipt that includes the following:

- Item purchased
- Full date of purchase, including year
- Place of purchase
- Amount of purchase, including item price, subtotal, taxes, fees, discounts, and grand total
- Method of payment (see [Proof of Payment](#) section)

If there are several items in the receipt, underline or highlight the item(s) the reimbursement request is for. If possible, purchase the item(s) in a different transaction.

### **For Instructional Materials – Elective/Enrichment**

Requests for reimbursement for elective or enrichment classes or lessons from providers who do not meet the criteria of part-time tutors must include documentation demonstrating the provider has the following:

- A valid or expired Florida educator's certificate.
- At least three years' experience in the relevant subject area as demonstrated by employment records.
- Currently enrolled in a post-secondary educational institution as a student of the relevant subject area.
- A degree from a postsecondary educational institution in the relevant subject area.
- A certification or national accreditation in the relevant subject area.

Additionally, the invoice or receipt must include the following:

- Scholarship student's first and last name
- Provider's first and last name
- Company name, if applicable
- Type of service rendered
- Dates and hours of instruction, including year
- Service rate

Proof of payment if the payee is the parent/guardian (see [Proof of Payment](#) section).

### **Full-Time Tutoring (For PEP Students Only)**

Invoice or receipt on business letterhead that includes the following:

- Scholarship student's first and last name
- Tutor's first and last name
- Tutor's DOE certification number





- Company name, if applicable
- Type of service rendered
- Dates and hours of instruction, including year
- Tutor's hourly rate
- Total amount due for the service
- Proof of payment if the payee is the parent/guardian (see [Proof of Payment](#) section)

If the provider is not listed in the provider marketplace, then a Step Up For Student's [full-time tutor participation agreement](#) and W-9 is required.

### **Part-Time Tutoring or Choice Navigator Services**

Part-time tutoring and Choice Navigator services include tuition and fees for services provided by a person who:

- Holds a valid Florida educator's certificate pursuant to s. 1012.56, F.S.
- Holds an adjunct teaching certificate pursuant to s. 1012.57, F.S.
- Has a bachelor's degree or a graduate degree in the subject area in which instruction is given.
- Is certified by a nationally or internationally recognized research-based training program as approved by the department.
- Has demonstrated a mastery of subject area knowledge pursuant to s. 1012.56(5), F.S. by one of the following ways:
  - For a subject requiring only a baccalaureate degree for which a Florida subject area examination has been developed, achievement of a passing score on the Florida-developed subject area examination specified in state board rule.
  - For a subject for which a Florida subject area examination has not been developed, achievement of a passing score on a standardized examination specified in state board rule, including, but not limited to, passing scores on both the oral proficiency and written proficiency examinations administered by the American Council on the Teaching of Foreign Languages.
  - For a subject for which a Florida subject area examination has not been developed or a standardized examination has not been specified in state board rule, completion of the subject area specialization requirements specified in state board rule and verification of the attainment of the essential subject matter competencies by the district school superintendent of the employing school district or chief administrative officer of the employing state-supported or private school.
  - For a subject requiring a master's or higher degree, completion of the subject area specialization requirements specified in state board rule and achievement of a passing score on the Florida-developed subject area examination or a standardized examination that is directly related to the subject specified in state board rule.
  - Documentation of successful completion of a United States Defense Language Institute Foreign Language Center program.



- Documentation of a passing score on the Defense Language Proficiency Test (DLPT).
- For a subject requiring only a baccalaureate degree for which a Florida subject area examination has been developed, documentation of receipt of a master's or higher degree from an accredited postsecondary educational institution that the Department of Education has identified as having a quality program resulting in a baccalaureate degree or higher in the certificate subject area as identified by state board rule.

Tuition and fee schedules must be published and made publicly available.

Invoice or receipt on business letterhead that includes the following:

- Scholarship student's first and last name
- Tutor's/service provider's first and last name
- Company name, if applicable
- Type of service rendered
- Dates and hours of services rendered, including year
- Tutor's hourly rate
- Total amount due for the service
- Proof of payment if the payee is the parent/guardian (see [Proof of Payment](#) section)

Documentation of certification: (The documentation below must be included with the first reimbursement request with the provider)

- The DOE certification number if the tutor is certified, or
- The school district issuing the adjunct teaching certificate, or
- A bachelor's or graduate degree in the subject area.
  - This may be a copy of the bachelor's or graduate degree diploma or official college transcript stating the degree conferred.
  - If the diploma does not show the tutor's major, submit the transcripts instead.

### **Contracted Public-School Services**

The parent/guardian may pay for services and request reimbursement, or the school district may choose to be paid directly as a provider.

The reimbursement request must include the following:

- Scholarship student's first and last name
- Name and address of the school
- Services provided
- Date the services were provided, including year
- A statement showing the amount paid (or billed)
- Proof of payment if the payee is the parent/guardian (see [Proof of Payment](#) section)



## **Fees for Florida Virtual School**

The parent/guardian may pay for services and request a reimbursement, or the parent/guardian may choose to bill directly for FLVS courses through the Service Provider Marketplace.

The reimbursement request must include the following:

- Scholarship student's first and last name
- Student courses paid for
- Dates/terms for the courses
- A statement showing the amount paid (or billed)
- Proof of payment if the payee is the parent/guardian (see [Proof of Payment](#) section)

If the student withdraws from the course within 14 days, a refund will be issued to the entity/individual from which payment was received.

## **Approved Pre-Apprenticeship Program**

Invoice or receipt on craftsperson/company letterhead that includes the following:

- Scholarship student's first and last name
- Name of the FLDOE-approved pre-apprenticeship course
- Craftsperson name and company name, if applicable
- Dates and hours of instruction, including year
- Program rate
- Total amount due for the service
- Proof of payment if the payee is the parent/guardian (see [Proof of Payment](#) section)

## **Fees for an Eligible Post-Secondary Institution, a Home Education Instructional Program, a DOE-Approved Online Provider, and a DOE-Approved Online Course**

Reimbursement requests submitted by the parent/guardian must include the following:

- Scholarship student's first and last name
- Name of the institution or course provider
- Course description
- Dates of course/service, including year
- Amount of tuition and fees
- Proof of payment, on institution letterhead, if applicable (see [Proof of Payment](#) section).

## **Reimbursement Mechanism**

Once approved, reimbursements can be paid to a parent from one of three ways to the student's scholarship account: via direct deposit (ACH), check, or PayPal. If direct deposit (ACH) is selected, families will be asked to submit personal banking information.



**Please note:** To help keep information secure, banking information is not stored in EMA. Reimbursements for multiple scholarship students on multiple scholarship programs will be paid separately.

[Click here](#) to learn more about how reimbursement payments are made and how to receive payment.

## **Direct Payment of Services**

To provide an additional level of service to the families of ESA students, Step Up For Students has developed a method of direct payment to approved providers. Providers wishing to participate in direct payment from families must set up a provider account in the EMA system and submit a service catalogue.

## **MyScholarShop**

Step Up For Students has developed an e-purchasing platform to assist purchasing items without any upfront cost to parents/guardians.

Items available through MyScholarShop are approved for purchase using FES-EO or FTC funds. If an item is not in MyScholarShop or in the Purchasing Guide, it does not mean the item is not approved; however, it is strongly suggested to submit a pre-authorization if unsure if the item is eligible for reimbursement.

Please read these instructions very carefully.

1. Make sure to have available funds in the scholarship account to cover the entire purchase.
2. This partnership is ONLY for goods purchased through MyScholarShop and does NOT apply to in-store purchases or purchases from the vendor's website.
3. If an item requires pre-authorization, the pre-authorization process must be completed and there must be an approval *prior* to placing the order.
4. If an item has an associated purchasing rule, such as size limitation, multiple items or frequency, those rules will apply when using the MyScholarShop platform.
5. MyScholarShop orders cannot be shipped out-of-state or to a post office box.
6. When purchasing multiple items, include ALL items in one order.
7. Be aware Step Up For Students reserves the right to deny requests.
8. Access to MyScholarShop will be activated once the student's account has funding.
9. Step Up For Students reserves the right to limit or deny access to MyScholarShop.



## Purchasing

MyScholarShop is accessible once funds have been deposited into a student's account. Once funds have been deposited, log in to the [EMA portal](#) to access MyScholarShop.

## Returns

Returns are completed through the vendor they were purchased from and not through Step Up For Students. It may not be returned to a store.

1. To return an item purchased via MyScholarShop, [click here](#).
2. Find the correct vendor and follow the instructions.

Once the vendor has received the item, it may take up to 14 days for the funds to be credited to the student's scholarship account

## Status Definitions

- **Composing:** Request is pending; the cart has not been submitted for purchase.
- **Submitted:** Request was submitted and is pending review.
- **Approved:** Items requiring review have been approved and sent to the vendor/s for fulfillment.
- **Denied:** Items requiring review have been denied. One appeal is allowed.
- **Ordering:** A fully approved order is in the process of being generated.
- **Ordered:** All items associated with an order or requisition have been sent to the vendor to fulfil.
- **Cancelling:** Order was canceled after it was placed.
- **Cancelled:** Order was cancelled after being submitted and approved.
- **Receiving:** Ordered items have been shipped and are in the process of being delivered.
- **Received:** Ordered items have been fully received.

[Click here](#) for more in-depth information on MyScholarShop.

## Account Balances

A student's unspent ESA funds may be rolled over from one school year into the next school year. However, if the student's scholarship account balance reaches \$24,000, Step Up For Students may not transfer scholarship funds into the student's scholarship account.

Parents/guardians are encouraged to monitor their student's scholarship balance and spending to ensure they remain eligible for scholarship payments.



## Closure of Accounts

A student's scholarship account must be closed, and any remaining funds will be returned to the state after:

- Denial or revocation of program eligibility by the commissioner for fraud or abuse, including, but not limited to, the student or student's parent accepting any payment, refund, or rebate, in any manner, from a provider of any services received;
- Any period of two consecutive fiscal years in which an account has been inactive.

## Actions That May Lead to a Loss of the Scholarship

Actions that may lead to a loss of the scholarship include, but are not limited to:

- SFO determines the student is not eligible for program renewal.
- Commissioner of Education suspends or revokes program participation or use of funds.
- Misrepresenting or withholding information on the scholarship application, application or reimbursement documentation.
- Enrolling the child in a private school that is not eligible to participate in the scholarship program.
- Failure to satisfy state compulsory requirements.
- Failure of the parent/guardian to approve quarterly scholarship payments.
- Failure of the student to take a required nationally norm-referenced test or the statewide assessment.
- Moving or residing outside of the state of Florida.
- Returning to a public school or utilizing another statewide scholarship; however, if a student enters a Department of Juvenile Justice detention center for a period of no more than 21 days, the student is not considered to have returned to a public school on a full-time basis for that purpose.
- Fraudulent activity, including taking possession of any scholarship funds by refund, rebate, or credit from a provider or direct good purchase.
- Student graduates high school or reaches 21 years of age, whichever occurs first.
- Allowing another party, including a provider or school representative, to access or manage a student's scholarship account; or
- For PEP students only:
  - Enrolling in a program that reports the student as a private school student.
  - Failure to submit or maintain a Student Learning Program for the student.
  - Failure to take a norm-referenced assessment or to submit assessment results to Step Up For Students.



## Parent/Guardian Responsibilities

Parents/guardians of students receiving FES-EO/FTC Scholarship funds may not take possession of funds at any time and are prohibited from providing services to their own scholarship student. Parents/guardians are subject to all FES-EO/FTC responsibilities as outlined in the annual Sworn Compliance Statement, the EMA Terms & Conditions, and relevant statutes. If a parent/guardian receives a refund for any services or goods purchased with scholarship funds, those funds must be returned to Step Up For Students for deposit into the student's scholarship account.

Parents/guardians may not assign the application or management of their scholarship application or any spending or reimbursement submission to any other user. Parents/guardians must not provide login information to ANYONE. Providing login information will allow them to access this critical information, make changes, and approve expenditures from the student's account. Step Up For Students will not be responsible for changes and/or charges made by anyone other than the account owner if the login information has been shared.

**Please note:** Any violation of the FES-EO/FTC Scholarship statutes, rules, policies or procedures may result in the loss of the scholarship, future scholarship ineligibility, or financial or criminal penalties.

## Important Items to Note

### About Reimbursements

- Reimbursement requests for goods or services purchased between July 1, 2023, and June 30, 2024, must be received by Step Up For Students by July 31, 2024.
- If an ACH payment is rejected by the banking institution, the funds will revert to the student's account after 30 days.
- Cash payments to private sellers will not be eligible for reimbursement. The parent/guardian must use a money order, personal or cashier's check, PayPal or other electronic payment method for reimbursement to be considered. When submitting a copy of a cleared check, black out the routing and account numbers and submit a copy of the front and back of the cleared check.
- If money is not spent from the account for two consecutive fiscal years (July 1 – June 30), the account will be closed, and all remaining funds, current and those rolled over from a prior year, will be returned to the state of Florida.
- FES-EO/FTC fund purchases may be subject to frequency of purchase rules. Please refer to the Frequency rules are by calendar rule. For example, an item with a two-year purchasing frequency, meaning a student who purchases an eligible on November 10, 2023, will be eligible to purchase another of the same item using scholarship funds on or after November 11, 2025.



- Step Up For Students staff may request additional documentation or clarification when they review the reimbursement request. These requests will arrive via email to the primary email address associated with the account.
- Step Up For Students reserves the right to close any reimbursement request submitted for payment.
- If the parent/guardian has been reimbursed from scholarship funds for an item that is returned OR have been reimbursed for lessons or tutoring in advance of the scheduled lesson or session and do not attend the session, any refund for which they receive cash should be returned to the student's scholarship account. A check, made payable to Step Up For Students, indicating the scholarship student's name and ID number, should be sent to Step Up For Students at the following address:

Step Up For Students  
Attention: Accounts Receivable  
4655 Salisbury Road, Suite 400  
Jacksonville, Florida 32256

- If a reimbursement request is denied, the parent/guardian may appeal the decision **ONE TIME** by submitting a new reimbursement request, noting in the description box it is an appeal or reconsideration request and providing documentation to supports the reconsideration request. The decision made by the Step Up For Students appeal team is final. After the appeal decision is made, any additional appeals for the same item will **not** be reviewed.
- **Please note:** Appeals will only be reviewed through the established process; Step Up For Students is unable to review appeals or resubmission requests that come via email or any other customer service channel.
- Always check the balance of the student's account prior to making purchases and when submitting reimbursement requests. The parent/guardian may view the balance on the online statement provided within their login. As a reminder, the amount reimbursed cannot exceed the available balance in the student's account.
- Step Up For Students approves reimbursement of items within the guidance of Florida statutes related to the scholarship program, as well as DOE rules and Step Up For Students policies and procedures. In addition to demonstrating educational benefit, Step Up For Students considers the manufacturer's recommended minimum age when processing reimbursement requests. Prior approval of items or services due to error does not constitute policy.
- Reimbursement requests to be paid directly to the parent/guardian may be approved for service dates up to three months in advance from the date of reimbursement submission. Requests submitted for services beyond the three-month window may be approved through the remainder of the school year (up to one year) if there is attestation from the provider that the services paid in advance are non-refundable. This





may be in the form of a signed and dated letter from the provider stating the payment is non-refundable or provider published financial policies evidencing these requirements. Requests for payment directly to a provider may only be approved after the service has been rendered.

## Continuing Program Eligibility

- Scholarship renewal:
  - Student must complete a renewal application each school year to receive additional funding and remain active in the FES-EO/FTC program.
  - Students must complete a renewal application to access any rollover funds from a previous school year.
  - Student who does not renew and receive FES-EO/FTC funding and “sit out” a year will lose renewal status and priority.
  - Student who leaves the FES-EO/FTC program and who chooses to later reapply for an FES-EO/FTC scholarship will be considered a new student.
- If the student returns to public school, does not renew program participation, or otherwise leaves the program, turns 21, or graduates high school but still has funds remaining in their account, the student may continue to spend scholarship funds that are in their account from prior years unless the account must be closed pursuant to Florida statute.
- Step Up For Students **MUST** be notified immediately if the scholarship student enrolls in one of the options listed below, **or if the student moves out of state**. Failure to do so could result in a loss of funding, loss of future eligibility, or financial or criminal penalties.
  - Public school or any public-school classes
  - Charter school
  - Services funded through the Florida Education Finance Program
  - Florida Virtual School – as a public-school student, not as a scholarship, private-pay, student
  - Family Empowerment Scholarship for Students with Unique Abilities (FES-UA)
  - Hope Scholarship Program
  - New Worlds Scholarship Accounts
- If a scholarship student is placed in any residential program, it is important the parent/guardian ask about the mandatory school attendance requirement while the student is in the program. If the program uses any Florida public school option (district school, charter school, Florida Virtual School), the student’s scholarship will be in jeopardy. If the program uses a private school option, and if the private school is an eligible, participating private school, the student’s scholarship funds may be available to cover the cost of tuition and fees while the student is attending.



## Important Notes

- Parents/guardians should keep contact information current, especially the primary email address. This is the primary way Step Up For Students will communicate important information related to the student's scholarship.
- Parents/guardians should update email filters to accept messages from Step Up For Students so emails are not sent to the spam or junk folders.
- Periodic surveys intended to validate a scholarship student's continued participation may be sent to the parent/guardian during the school year. Participation in these surveys is required.
- Students in grades 3-10 attending an eligible, private school using scholarship funds are required to take an approved, nationally standardized, norm-referenced assessment. Students with disabilities for whom standardized testing is not appropriate are exempt from this requirement. [Click here](#) for more information about this requirement.
- Scholarship students who choose to attend a private school will not be entitled to services under IDEA Part B unless they have been evaluated by the public-school district.
- The terms outlined in this handbook are subject to change.

Please DO NOT provide parent/guardian login information to ANYONE. Providing login information will allow them to access this critical information, make changes, and approve expenditures from a student's account. Step Up For Students will not be responsible for changes and/or charges made by anyone other than the account owner if the login information has been shared.

## Step Up For Students Related Web Pages

- [Document Library for Applicants](#)
- [Resources Page](#)
- [FES-EO Frequently Asked Questions](#)
- [PEP Frequently Asked Questions](#)
- [FES-EO Program Facts](#)
- [Find a School Tool](#)

## Videos


- [Information about the PEP scholarship](#)
- [Information about the Student Learning Plan in the EMA portal](#)

## Contact Information


Step Up For Students wishes all scholarship students a productive and fun-filled 2023-24 school year.



There are 3 ways to reach Step Up For Students:

 Chat with a live agent at [StepUpForStudents.org](https://StepUpForStudents.org)

 Email [Info@SUFS.org](mailto:Info@SUFS.org)

 Call (877) 735-7837

The Service Center is generally open from 8:00 a.m. - 5:00 p.m. Eastern. During peak periods, hours may be extended. For Service Center hours, please visit the [Contact Us](#) page on the Step Up For Students website.

If at any point there is a change of address, telephone, cell phone or e-mail address, the information can be updated by logging into the student's account.