Appendix C - FES-UA Eligible Private School Direct Payment Checklist



The checklist below will guide Eligible Private Schools with a current provider account on submitting requests directly to Step Up For Students for payment from students' accounts for services rendered.

▶ Log in to Your Step Up For Students Provider Account

- Go to stepupforstudents.org and choose "APPLY/LOGIN"
- Go to "FES-UA School & Provider Login" and click "Login"
- Enter your user ID and password

Submit a Reimbursement Request

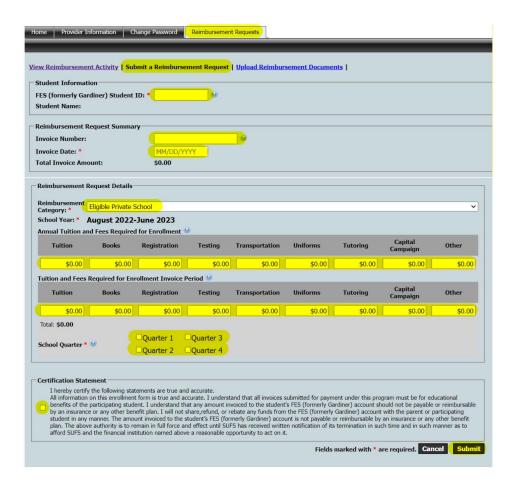
- Choose "Reimbursement Requests"
- Choose "Submit a Reimbursement Request"
- Enter the Student ID number
- Enter the Invoice Number
 - This is optional. If you do not have an invoice number, you could create one using the student's first and last initials and date of the quarter for which you are invoicing (e.g., AB070122).
- Enter the Invoice Date
 - This should be the start date of the quarter which you are invoicing for, such as 7/1 for Quarter 1.
 - Quarter 1 July 1 through September 30
 - Quarter 2 October 1 through December 31
 - Quarter 3 January 1 through March 31
 - Quarter 4 April 1 through June 30
- Choose "Eligible Private School" as the reimbursement category
- Enter the "Annual Tuition and Fees Required for Enrollment"
- Enter the "Tuition and Fees Required for Enrollment Invoice Period" using the following schedule

Date	Amount billed
July 1	25% of annual tuition and UP TO 100% of fees mandatory for enrollment if funds are available in the student's account to cover the fees. Students transitioning from McKay and those who are NEW to the FES-UA scholarship may not have additional funds in their account beyond the first quarter amount.
	Mandatory fees may be divided into quarters (25%) to avoid exceeding the student's quarterly award amount.
	If an invoice request exceeds available funds in the student's account, the provider will receive an error message; please work with the parent to calculate how much to invoice the student.
October 1	25% of annual tuition and any remaining fees mandatory for enrollment if funds are available in the student's account to cover the fees.
January 1	25% of annual tuition and any remaining fees mandatory for enrollment if funds are available in the student's account to cover the fees.
April 1	25% of annual tuition and any remaining fees mandatory for enrollment if funds are available in the student's account to cover the fees.

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- Choose the correct "School Quarter"
- Read and acknowledge the Certification Statement and click "Submit"
 - If, after clicking "Submit" an error is found on the form, you may be required to complete the form again.
- Once the request has been accepted, the system will navigate to the upload documents screen.
 IMPORTANT: Documents are NOT required to be submitted unless the request for payment includes additional fees or services not included in the annual tuition and fees required for enrollment.



Parent Approval

- After the request has been submitted, the parent will receive a notification email that a request is pending approval. Until the parent approves the request, no further action will be taken by Step Up For Students.
- You will be able to follow the status of submitted requests by choosing "View Reimbursement Activity" in your Step Up For Students provider portal.

Payment to Your Account

After the request has been reviewed and approved for payment by the parent, a payment request will be sent to the bank. Payment requests will be made on the Monday, Wednesday, or Friday following the date of approval by the parent. Allow 2-3 business days after parent approval for the ACH deposit to post to your account.

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Tips

- Please keep in mind that you will need to work with the parent/guardian of the student to calculate how much you may bill the scholarship. Providers cannot invoice for more than is available in the student's account. If the school is owed additional fees, the parent is responsible for those fees.
- Ensure that Eligible Private School is chosen as the Reimbursement Category. Failure to do so may result in processing delays.
- Include descriptions and itemized amounts for any fees placed in the "Other" category, including if they are mandatory or required for enrollment.
- You do NOT need to upload documents for charges included in the annual tuition and fees. However, if you choose to upload an invoice, ensure it includes the school's name and address, student's full name, invoice dates and school year, description of charges, and amount due.
- Inform parents when you submit a payment request. Parents have 30 days to approve the request. Payment requests not approved by the parent within 30 days will be denied as an incomplete submission and will need to be resubmitted by the school.
- Schools may not submit for reimbursement for quarters ahead of time, but they may submit for reimbursement for quarters that have already taken place.