



# **FLORIDA CHOICE SCHOLARSHIPS**

**FAMILY EMPOWERMENT SCHOLARSHIP FOR EDUCATIONAL OPTIONS  
FLORIDA TAX CREDIT SCHOLARSHIP PROGRAM  
PERSONALIZED EDUCATION PROGRAM  
PARENT/GUARDIAN HANDBOOK**



Click on any line within the Table of Contents to go directly to the section.

**Table of Contents**

Contact Step Up For Students..... 4

Overview ..... 4

Parent and Guardian Rights and Responsibilities..... 4

    Data Confidentiality..... 5

    Data Security ..... 5

    Access to School District Courses and Services..... 5

    Maintaining Up-to-Date Contact Information ..... 6

Qualifying and Applying for a Scholarship ..... 6

    Eligibility Requirements..... 6

    Choosing the Right Scholarship: Private School and PEP Options..... 6

        Full-Time Eligible Private School Option ..... 6

        Personalized Education Program (PEP) Option ..... 7

    Applying for a Scholarship ..... 7

    Multiple Applications Prohibited ..... 7

    Proof of Residency..... 8

        Proof of Residency for Active-Duty Military Families..... 8

    Award Prioritization ..... 9

        Household Members..... 9

        Proof of Income ..... 10

        No Priority ..... 10

    Application Deadlines ..... 10

        Application Deadline Exceptions ..... 11

Scholarship Participation Requirements ..... 11

    Full-Time Eligible Private School Option..... 12

        Transferring Among Participating Private Schools..... 13

    Personalized Education Program (PEP) Option..... 13



Leaving the Scholarship Program .....	14
Annual Assessment Requirement .....	14
Continuing Program Eligibility.....	15
Placement in Residential Programs.....	15
Funding for Scholarships.....	15
Scholarship Amounts .....	16
Scholarship Funding Requirements and Proration.....	16
Scholarship Funding Schedule.....	16
Funding Continuation and Rollover .....	17
Accrued Interest .....	17
Account Closure and Fund Revocation .....	17
Transferring Among Scholarship Funding Organizations.....	18
Authorized Uses of Scholarship Program Funds.....	18
General Purchasing Rules.....	19
Making Successful Purchases .....	19
Pre-Authorization Requests .....	19
Educational Benefit Form.....	20
Receiving Payments, Refunds or Rebates .....	20
Frequency of Purchase Limitations .....	21
Items that are Lost, Stolen or Broken Beyond Repair.....	21
Direct Payment to Eligible Private Schools .....	22
Full-Time Eligible Private School Students .....	22
Individual Classes, Extracurricular Activities, or Services at an Eligible Private School.....	22
Part-Time PEP Students.....	22
PEP Hybrid Eligible Private School Students .....	23
Direct Payment for Services.....	23
MyScholarShop .....	23
MyScholarShop Guidelines .....	24
MyScholarShop Returns .....	24




---

Status Definitions .....	24
Submitting Reimbursement Requests .....	25
Reimbursement Timing .....	25
Reimbursement Status Definitions .....	26
Advance Reimbursement .....	26
Required Supporting Documentation .....	26
Proof of Payment .....	27
Documenting Eligible Uses of Scholarship Funds .....	29
Reimbursement Mechanism.....	33
Appeals.....	33
Actions That May Lead to a Loss of the Scholarship .....	33
For More Information .....	34
Videos.....	35
Contact Information .....	35



## **Contact Step Up For Students**

The Step Up For Students Customer Engagement Center is available Monday through Friday from 8:00 a.m. to 5:00 p.m. EST. Parents and guardians who have questions or need assistance can contact Step Up via chat at [StepUpForStudents.org](https://StepUpForStudents.org), phone at (877) 735-7837, or [visit the Contact Us page](#) on the Step Up For Students website.

Parents or guardians should be prepared to provide the phone number or email address associated with their profile, security question answers, or other details to verify their identity.

## **Overview**

The Florida Tax Credit (FTC) Scholarship, including the Personalized Education Program (PEP) and Family Empowerment Scholarship for Educational Options (FES-EO), are scholarships that help parents and guardians customize their student's education.

Since 2023, any Florida student who is eligible to enroll in a public school for kindergarten through 12<sup>th</sup> grade is eligible for these scholarships.

The Florida Tax Credit Scholarship and the Family Empowerment Scholarship for Educational Options allow families to pay tuition and fees at an eligible private school. Families may use remaining funds for other education-related expenses allowed by law.

The Personalized Education Program (PEP) supports parent-directed learning for students who are not enrolled full-time in a public or private school. The student scholarship account functions like a bank account from which a parent or guardian directs funds to pay for tuition and fees for eligible PEP Hybrid and part-time private schools, home education instructional programs, tutoring, curriculum, and other education-related expenses allowed by law.

Participating students must develop a Student Learning Plan (SLP) annually that outlines how the funds will support a comprehensive education and must also complete and submit prior year scores from an annual norm-referenced assessment.

Step Up For Students is a nonprofit Scholarship Funding Organization (SFO) approved by the state of Florida to administer education choice scholarship programs.

This handbook helps parents and guardians understand the rules governing the scholarship programs and guides them through the process of applying for and using the FTC, FES-EO, and PEP scholarships.

## **Parent and Guardian Rights and Responsibilities**

Parents and guardians of scholarship students are subject to all scholarship program rules and responsibilities, including the annual Sworn Compliance Statement, Terms & Conditions in EMA, relevant statutes, and rules set by the Florida Department of Education (FLDOE).



Parents or guardians of students receiving and using scholarship funds may not take possession of scholarship funds at any time and are prohibited from being paid from scholarship funds for services provided to their own scholarship student.

The terms outlined in this handbook are subject to change.

## Data Confidentiality

The information available behind the parent or guardian login in EMA is personal and confidential.

A parent or guardian may not assign the responsibility for submitting any application or reimbursement documentation to another user and must not provide anyone, including service providers or personnel at a private school, access to a student's scholarship account by providing a username and password.

Doing so may result in loss of scholarship eligibility and funding, and/or financial or criminal penalties. Step Up For Students will not be responsible for changes or purchases made by anyone other than the account owner if the login information has been shared.

This policy is intended to prevent misuse of scholarship funds and protect the confidentiality of sensitive financial and educational information that belongs to students and their parents or guardians.

## Data Security

Step Up For Students will never ask a parent or guardian for the following information via email, phone call, or text message:

- Full account password or any part of it
- Full social security number (Step Up may ask for the last 4 digits for account verification purposes)
- Credit card number or banking details
- Any personal identification numbers other than the PIN provided on the scholarship application

Parents or guardians who receive any communication requesting this type of information or have received a suspicious email should not respond or click on any links. Instead, they should [report the activity immediately on the Contact Us page](#) on the Step Up For Students website.

## Access to School District Courses and Services

PEP scholarship students must be provided the same flexibility and opportunities outlined in sections (3) – (12) of [Florida's Home Education statute](#), including access to classes and extracurricular activities offered by their local public schools.

Parents and guardians may use their student's scholarship to pay for classes or services provided by public schools. Public schools may not report the student to the state for funding.



A scholarship student who receives services from a public school or district is considered to be attending a public school part time as authorized under s. [1002.44](#), F.S.

## Maintaining Up-to-Date Contact Information

Parents or guardians should keep contact information current, especially their primary email address. This is the primary way Step Up For Students will communicate important information related to a student's scholarship.

Parents or guardians should update email filters to accept messages from Step Up For Students so emails are not sent to spam or junk folders.

If there is a change of physical or mailing address, telephone number, cell phone number or email address, the information must be updated in EMA. Parents or guardians should contact Step Up For Students to [update their Proof of Residency](#).

## Qualifying and Applying for a Scholarship

### Eligibility Requirements

The FTC, FES-EO and PEP scholarships are available to students who are:

- Florida residents or dependent children of active-duty members of the United States Armed Forces who have received Permanent Change of Station (PCS) orders to Florida or renewing students whose home record or state of legal residence is Florida and have received PCS orders outside of Florida, and
- Eligible to enroll in grades K – 12 in a Florida public school or received a Hope Scholarship in the 2023-24 school year.

A student entering kindergarten must be 5 years old on or before September 1 of the school year of their scholarship application.

Please note: Active-duty members of the United States Armed Forces who do not have a Florida residential address at the time of application but have received Permanent Change of Station (PCS) orders must provide a copy of their PCS orders in the application documents and list the Florida address of the unit to which they are being assigned or from which they are being relieved.

Misrepresenting any information provided to Step Up For Students in a scholarship application could result in the revocation of the student's scholarship and may be punishable as a crime.

## Choosing the Right Scholarship: Private School and PEP Options

A parent or guardian may choose an eligible private school or PEP scholarship.

### Full-Time Eligible Private School Option

Students who receive an FTC or FES-EO scholarship and do not participate in PEP must enroll at an eligible, participating private school and receive full-time instruction in-person at the school's physical location.



## Personalized Education Program (PEP) Option

“Personalized Education Program” means the sequentially progressive instruction of a student directed by his or her parent or guardian to satisfy Florida’s compulsory education requirements (see of ss. [1003.01 \(13\)](#) and [1003.21 \(1\)](#), F.S.).

PEP scholarships are funded through the FTC Scholarship Program. Scholarship funds may be used to pay tuition and fees for programs, courses, or classes allowed by law. More information is available in [Authorized Uses of Scholarship Program Funds](#).

To apply for a PEP scholarship, the parent or guardian must indicate their preference on the [scholarship application](#). PEP has a statutory capacity limit of up to 60,000 students for the 2024-25 school year.

## Applying for a Scholarship

Step Up For Students requires parents and guardians to submit a complete scholarship application each year through their EMA account, which can be accessed at [StepUpForStudents.org](#).

EMA, the Education Market Assistant, is the system Step Up For Students created to help parents and guardians manage every facet of their student’s scholarship, starting with the online scholarship application.

[This video](#) and [this guide](#) how to create a parent or guardian profile in EMA. Using their EMA login, parents and guardians can [complete an online application](#) and submit documentation required to confirm the student’s age, income (if applicable), Florida residency, and compliance with program rules.

[This guide](#) explains how to complete an application and [this checklist](#) outlines the documents a parent or guardian should prepare when they apply.

A parent or guardian must use their phone number, physical address and email address, and no one else’s, in their guardian profile.

A participating school or provider may not apply on behalf of a parent or guardian, submit documentation, or otherwise act on behalf of the parent or guardian. Schools or providers must not request access to or obtain the parent’s or guardian’s information to access the student’s scholarship account.

Doing so may result in revocation of the provider’s participation in the program or the student’s scholarship eligibility and funding and may carry a financial or criminal penalty.

## Multiple Applications Prohibited

Scholarship program statutes prohibit a student from applying for more than one scholarship for the same student at the same time.





If a parent or guardian applies for both a Family Empowerment Scholarship for Students with Unique Abilities (FES-UA) and an FTC or FES-EO scholarship for the same student, that student will remain on the FES-UA scholarship and the other scholarship will be declined.

If a parent or guardian has applied for one scholarship for their student and would like their student to participate in a different scholarship program, they must [contact Step Up For Students](#) to submit a Scholarship Change form before applying to avoid a funding delay. If a student attends an eligible private school, parents or guardians should communicate with their child's school before changing scholarship programs to confirm which scholarships their school accepts. If they are leaving their private school for a different scholarship, they must contact their school to withdraw their student's enrollment.

A parent or guardian may only submit one application per scholarship program. Parents or guardians should make sure all students for whom they wish to apply are added to the My Students section in EMA before submitting their application.

A scholarship student may only be associated with one parent or guardian profile. If a student has multiple parents or guardians and appears on multiple parent or guardian profiles, there may be a delay in the student's scholarship processing or funding. If a current scholarship student's guardianship is updated, their parent or guardian must contact Step Up to update this information.

## Proof of Residency

The applying parent and guardian must prove they are a resident of Florida to be eligible for an FTC, FES-EO or PEP scholarship.

[This checklist](#) outlines documents that can serve as proof of residency.

### Proof of Residency for Active-Duty Military Families

Students who are dependent children of active-duty members of the United States Armed Forces with Permanent Change of Station (PCS) orders to move into or current scholarship students under orders to move out of Florida can apply for a PEP scholarship.

If a new student is moving to Florida, but has not yet established residency, the parent or guardian should:

1. Upload the PCS orders in the Proof of Residency section of the scholarship application.
2. Be sure the physical address in their guardian profile matches the newly assigned unit address on the PCS orders they submit.
3. Once residency in Florida is established, call Step Up For Students at (877) 735-7837 to provide an updated Proof of Residency.

Students will not receive funds until an updated Proof of Residency is received and the physical address is updated in the guardian profile in EMA.



If a renewal student is moving out of Florida, the parent or guardian should use the physical address of the unit from which they are relieved on the PCS orders in their guardian profile and:

1. Upload a Leave and Earnings Statement, IRS Domicile 2058 or DFAS Form 702 in the Student Information section of the scholarship application.
2. Upload the PCS orders in the Proof of Residency section of the scholarship application.

### Award Prioritization

Scholarship applications will be reviewed on a first-come, first-served basis. Scholarships will be awarded in this order of priority:

1. Renewal students (those who received and utilized FTC, FES-EO, PEP or Hope Scholarship funding during the 2024-25 school year),
2. 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,
3. Students whose families have a household income between 186% and 400% of Federal Poverty Level by household size,
4. Students whose families have a household income greater than 400% of Federal Poverty Level by household size, or students whose families do not provide income information to be considered for application priority.

Persons in family/household	Priority 1 ≤ 185%	Priority 2 186%-400%
1	\$27,861	\$60,240
2	\$37,814	\$81,760
3	\$47,767	\$103,280
4	\$57,720	\$124,800
5	\$67,673	\$146,320
6	\$77,626	\$167,840
7	\$87,579	\$189,360
8	\$97,532	\$210,880
9	\$107,485	\$232,400
10	\$117,438	\$253,920

Each additional member +\$9,953      Each additional member +\$21,520

Based on guidelines published by the Department of Health & Human Services in National Registry on January 2024

### Household Members

To calculate the correct household size and establish application priority, all household members must be included on an application.

The application will prompt parents or guardians to add additional household members, if applicable. An additional household member is anyone residing at the same address who is not listed on the scholarship application as a student, parent, or guardian.



- If a household member is under the age of 18, they must be a dependent to be included as a household member on the application.
- If the household member is 18 years or older, employment information must be provided for this person if they share expenses or income.

### Proof of Income

To be considered for application priority, the scholarship application must list all income sources for all household members 18 years or older.

Sources of income include:

- Paychecks
- Cash wages
- Self-employment or business income
- Unemployment benefits
- Social Security
- Income/disability for every household member (including children)
- Child support
- Interest or investment income

### No Priority

A parent or guardian may choose to decline to provide income documentation. To do so, the parent or guardian must select “YES” to opt out of providing income documentation within the scholarship application.

The application will be processed without priority. For record-keeping purposes, the household will be reported as having an income greater than 400% of the [federal poverty level](#).

### Application Deadlines

**For renewal Private School students**, the last day to submit a scholarship application for the 2025-26 school year is April 30, 2025. This process for renewal students also requires parents to confirm the scholarship is being accepted or declined by May 31, 2025.

**For new Private School students**, the last day to submit a scholarship application for the 2025-26 school year will be November 15, 2025. This process for new students also requires that parents and guardians then confirm that the scholarship is being accepted or declined by December 15, 2025.

**For new and renewal PEP students**, the last day to submit a scholarship application for the 2025-26 school year is April 30, 2025. This process for renewal students also requires parents to confirm the scholarship is being accepted or declined by May 31, 2025.

Applications may close earlier if the program reaches its full capacity before these dates. When applications reach capacity, parents and guardians will be able to register for a program interest list to receive notifications if more applications become available. Any applications submitted after the renewal application deadline will be treated as new applications.



## Application Deadline Exceptions

The following students are excluded from the standard application deadline and can apply for a scholarship any time during school year:

- Dependents of active-duty members of the United States Armed Forces
- Students in foster care or out-of-home care
- Students who experience a bullying or harassment incident at their public school

Exceptions from the application deadline do not exclude students from the limits on PEP scholarship program capacity.

Parents and guardians with these exceptions applying for a scholarship outside of application season will need to call Step Up For Students at (877) 735-7837 to have an application opened for their student.

The following documents are requested for the appropriate deadline exclusions:

- Dependents of an active-duty member of the United States Armed Forces have three options depending on the scenario:
  - Established Florida residents: A copy of the Service Member's Leave & Earnings Statement (LES) for the month the application is submitted.
  - Moving out of Florida: (renewal students only) A copy of the Permanent Change of Station orders and Leave and Earnings Statement, IRS Domicile 2058 or DFAS Form 702.
  - Moving into Florida: (new students only) A copy of the Permanent Change of Station orders.
- Foster child: A copy of the Foster Placement documentation, or other similar legal documentation.
- Adopted child: A copy of an Adoption Decree, or other similar legal documentation.
- Students who experience bullying: A completed [Hope Scholarship Notification Form](#).

## Scholarship Participation Requirements

Once awarded a scholarship, the parent or guardian can access their student's Award ID by logging in to EMA, [as outlined in this video](#). Parents or guardians may also print this notice to save for their records or document their student's participation in the scholarship program.

A student awarded an FTC, FES-EO, or PEP scholarship may not enroll full-time in any public school, including:

- A charter school
- A developmental research school
- Any other Florida public school
- Florida Virtual School or any other online public school as a non private-pay student
- The College-Preparatory Boarding Academy
- The Florida Scholars Academy
- The Florida School for Competitive Academics



- The Florida School for the Deaf and the Blind

Parents and guardians may use their student's scholarship to pay for classes or services provided by public schools, but public schools may not report the student to the state for funding.

Students may not receive multiple K – 12 scholarships under FES-UA, FES-EO, FTC, or PEP at the same time

More information for students who want to leave their current scholarship program for another option is available in [Leaving the Scholarship Program](#).

In addition, participating families have different requirements depending on whether they choose the PEP or full-time private school scholarship options.

### Full-Time Eligible Private School Option

Students who do not use a PEP scholarship must be educated full-time at the physical location of an eligible private school. Step-by-step instructions for parents or guardians whose student has been awarded a scholarship are [available from Step Up For Students here](#).

Once a student is awarded a scholarship:

1. The parent or guardian must select an eligible, participating private school. [This tool](#) can help families find participating schools in their area.
2. Once a private school has been selected, the parent or guardian should provide the student's Award ID to the selected school. The Award ID is available under the My Students tab in EMA. [This video](#) provides a step-by-step guide.
3. The school will use the Award ID to enroll the student in EMA.
4. The parent or guardian will confirm enrollment in EMA.

After a student enrolls in an eligible private school, the school and parent or guardian must both certify the agreed-upon tuition and fee rate for the student. The agreed-upon tuition and fee rate may include discounts or other considerations. It may be less, but not more, than the school's published tuition and fee rate for the student's grade level. It may not be less than \$4.

The agreed-upon amount of tuition and fees in EMA should not exceed any amount the parent or guardian has agreed to pay the eligible private school. Schools participating in the scholarship program cannot charge a different rate for scholarship students and non-scholarship students. The same published tuition schedule must apply to all students, whether on scholarship or paying privately.

For example: If a school and a parent agree to a tuition and fee rate of \$8,000, the amount charged in EMA should be \$8,000 or less.

Many participating private schools charge more than the value of the scholarship. In some cases, they may decide to provide scholarship students with supplemental financial assistance.



The parent or guardian 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.

If a student is enrolled at a school before a scholarship has been awarded, the parent or guardian will be responsible for paying any tuition and fees due to the school.

Once funding has begun, if a full-time student unenrolls from their private school at any time during the school year, the student will be unable to access any funds for [other expenses](#) until they have enrolled again in a participating private school.

### **Transferring Among Participating Private Schools**

Students using the private school scholarship option may transfer their scholarship among participating private schools. If a parent or guardian is not satisfied with the private school they have chosen, they may find another one.

Before a parent or guardian withdraws their student from the private school, they should notify the school and understand the school's transfer policy.

A student must withdraw from their school in EMA before they can enroll in another participating private school in EMA.

If a student's scholarship requires full-time enrollment in an eligible private school, funding has been distributed to their account, and the student withdraws and does not re-enroll in an eligible private school within 30 days, the student's scholarship account must be closed and any remaining funds for that quarterly payment period must revert to the state.

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 or guardian. If the school has been overpaid, Step Up will invoice the school for the overpayment.

If a student transfers to a different participating school in the same quarter, the first school the student attended for 10 days or more during that quarter will receive the full quarter's payment.

The parent or guardian and the two schools may negotiate any amount owed to the new school from the quarterly payment made to the first school. This is not required, but, in the spirit of partnership for the good of the student, is highly recommended.

Parents or guardians should allow five business days for the current school to withdraw the student. If the student has not been withdrawn after five business days, they should [contact the Customer Engagement Center](#) at Step Up For Students.

### **Personalized Education Program (PEP) Option**

PEP scholarship students must meet the following requirements:

- Declare a grade level, which is used to determine eligibility and scholarship funding.
- [Submit a Student Learning Plan \(SLP\)](#) annually. The SLP is located on the dashboard in EMA and must be submitted before a student can receive scholarship funding. The



parent or guardian must develop this customized learning plan to guide instruction for their student and address the services needed to fulfill their child's academic needs. It does not determine or limit what the parent or guardian can purchase with scholarship funds.

- PEP students enrolled in an approved PEP Hybrid eligible private school option must address their student's remaining instructional time in their SLP.
- Withdraw as a full-time public or private school student or terminate a home education instructional program with their school district after receiving PEP scholarship funding.
- Take a statewide assessment or a state-approved national norm-referenced test annually and provide those results to Step Up For Students. [This video](#) explains how to submit results. To view a list of the state's approved norm-referenced tests [click here](#).

PEP scholarship students may not enroll full-time at an eligible private school. However, they may enroll part-time. More information is available in [Part-Time PEP Students](#) and [PEP Hybrid Eligible Private School Students](#).

## Leaving the Scholarship Program

Parents or guardians must notify Step Up For Students immediately by calling to submit a Scholarship Change Request form, if a scholarship student:

- Plans to enroll in any public school, including Florida Virtual School or another online school, where they will be reported to the state for funding. (Students may use their scholarships to pay for courses or other services provided by these institutions.)
- Intends to apply for a Family Empowerment Scholarship for Students with Unique Abilities, the Transportation Stipend, or New Worlds Scholarship Accounts program.
- Moves out of state (except for renewing students of active-duty members of the United States Armed Forces who receive permanent change of station orders out of state while maintaining legal residence in Florida).

Failure to notify Step Up For Students could result in a loss of funding, loss of future eligibility, and/or financial or criminal penalties.

If state records show a student enrolled in a public school after receiving scholarship funds, the funds deposited into the student's account for that school year will be returned to Step Up For Students or the state of Florida.

If a student is found enrolled in public school or another scholarship program, their parent or guardian will be notified by email and should contact Step Up For Students immediately.

## Annual Assessment Requirement

Students in grades 3 – 10 attending an eligible private school using FTC or FES scholarship funds are required to take a nationally norm-referenced test [identified by the Florida Department of Education](#) or to take the statewide assessments pursuant to s. [1008.22](#), F.S.



Students in grades K – 12 participating in the PEP scholarship program are required to take an assessment approved by the Florida Department of Education and [submit the results](#) to Step Up For Students annually before receiving funding for any scholarship.

More information, including a list of approved assessments, is [available from the department here](#).

Students with disabilities for whom standardized testing is not appropriate are exempt from this requirement. These students must submit the [Standardized Testing Exemption Form](#).

## Continuing Program Eligibility

Once a student's scholarship has been funded, a parent or guardian may submit a renewal application each year to continue with the scholarship as long as they meet residency requirements and remain eligible to enroll in a Florida public school.

The student will remain eligible until they return to public school, graduate high school, or turn 21 years old.

A student will need to apply for the scholarship as a new student if they:

- Do not renew their scholarship and “sit out” a year.
- Leave the program and later seek to resume participation.

If a student turns twenty-one (21) years old, graduates high school, or enrolls full-time in public school, but still has funds remaining in their scholarship account, the parent or guardian may continue to access and spend those funds on eligible expenses until no funds remain in the scholarship account. Accounts will be closed after two years without any spending activity.

## Placement in Residential Programs

If a scholarship student is placed in any residential program, the parent or guardian must confirm how participating students meet the mandatory school attendance requirement.

- If the program uses any Florida public school, including a full-time online school, the student may lose their scholarship eligibility if the online school reports them to the state for funding.
- If the program includes a private school that is approved by the Florida Department of Education, the student's scholarship funds may be available to cover the cost of tuition and fees.

## Funding for Scholarships

Funding for FTC scholarships, including PEP scholarships, comes from [tax credit funds raised from corporate donors](#) by Step Up For Students.

Funding for the Family Empowerment Scholarship for Educational Options (FES-EO) comes from the state of Florida.





## Scholarship Amounts

Scholarship funding is based on two factors:

- A student's grade level
- The county where they live

The 2024-25 scholarship funding amounts are [available here](#).

## Scholarship Funding Requirements and Proration

To receive scholarship funding:

- Students using the private school option must confirm enrollment at an eligible private school in EMA.
- PEP scholarship students must complete a Student Learning Plan (SLP) in EMA.
- Prior year PEP scholarship students must submit their annual assessment results in EMA.

Scholarship funding is prorated based on the dates when the above steps are complete:

- Students who complete steps by October 15, 2024 = funded 100% of total award amount
- Students who complete steps by January 15, 2025 = funded 50% of total award amount

Students who do not complete their enrollment or SLP and Assessment Results by January 15 will not receive scholarship funding for the 2024-25 school year.

## Scholarship Funding Schedule

Scholarship funds are deposited into student scholarship accounts quarterly.

A Scholarship Funding Organization must verify a student's eligibility to participate in the program at least 30 days before receiving funding from the state.

Once the Florida Department of Education receives a verified list of eligible students from Step Up, they will distribute scholarship funds quarterly on the following dates:

Enrollment or SLP deadline	Funds delivered to Step Up
June 30*	August 1*
July 26*	September 1*
September 15	November 1
December 15	February 1
February 15	April 1

\* There are two funding dates for the first quarter.

For students enrolled full-time in an eligible private school, Step Up will make quarterly payments for tuition and fees within seven (7) business days after both the school and the parent or guardian have approved the payment. If a student attends their school for at least 10 days during a quarterly payment period, their school will receive the full distribution for that quarter.



Step Up may sometimes provide supplemental funding to students who were not funded on the above schedule. Step Up will communicate this with impacted families via email.

Once tuition and fees are paid to the private school, students may use any remaining funds for other eligible expenses. More information is available in [Authorized Uses of Scholarship Program Funds](#) or the program [Purchasing Guide](#).

If Step Up For Students deposits excess funds in error to a student's scholarship account, Step Up will recover the excess funds by potentially adjusting future funding amounts. Parents and guardians should be aware of the amount of funds in the student's scholarship account when making purchases, and try to avoid spending any funds that may have been deposited into the student's account by mistake. If a student switches scholarship programs mid-year, Step Up may need to recover excess funds tied to their previous scholarship program.

### **Funding Continuation and Rollover**

Once funds are deposited into the student's account, parents or guardians may use the funds for items and services described in the sections below.

A student's unspent scholarship funds may be rolled over from one school year to the next. However, under Florida law, Step Up For Students cannot transfer funds into the student's scholarship account that would raise the balance above \$24,000.

If a student enrolls in a public school, graduates from high school, or reaches 21 years of age on or before July 1 (whichever comes first), the student will not be eligible for additional scholarship funding. Funds received while a student is eligible for the program will remain in their account in EMA.

### **Accrued Interest**

Florida law requires Step Up to establish separate scholarship accounts for each scholarship student. It also requires us to record interest accrued on each student's account and make sure any interest is reserved for that student's benefit. This means accrued interest counts toward each student's scholarship funds.

### **Account Closure and Fund Revocation**

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

- Denial or revocation of program eligibility by the commissioner for fraud or abuse,
- Any period of two consecutive fiscal years (July 1 – June 30) with no spending activity,
- Withdrawing from a private school after receiving funding and not re-enrolling for full-time instruction in an eligible private school within 30 days.

More information for students who want to leave their current scholarship program for another option is available in [Leaving the Scholarship Program](#).



## Transferring Among Scholarship Funding Organizations

Students may only have a scholarship funded by one Scholarship Funding Organization (SFO) at a time. If a student wants to transfer from one SFO to another, they must follow these steps:

### Step 1: Has the student already applied for a scholarship with an SFO other than Step Up For Students?

- If yes, proceed to Step 2.
- If no, they may apply for a scholarship at any SFO.

### Step 2: Has the student already been awarded a scholarship or received funding from an SFO other than Step Up For Students?

- If yes, proceed to Step 3.
- If no, the student must decline the scholarship before applying with Step Up For Students.

### Step 3: Has the student submitted a new, completed application to Step Up For Students and been found eligible for a scholarship?

- If yes, the student must contact their current SFO to initiate a scholarship transfer.
- If no, the student must apply for a scholarship with Step Up For Students and be found eligible before initiating the scholarship transfer process.

A parent or guardian of a student with a scholarship currently funded by Step Up For Students should contact Step Up if they want to request a transfer to another SFO. Step Up For Students will work with the other SFO to begin the transfer process.

If a student wishes to decline a scholarship they received from Step Up For Students, they must call Step Up to complete a Scholarship Change Request form.

Transferring funds may take several weeks to complete.

## Authorized Uses of Scholarship Program Funds

Scholarship program funds must be used for eligible expenses that meet the individual educational needs of the scholarship student.

The following categories of items and services are approved uses for the scholarship funds.

Eligible expenses are detailed in the program [Purchasing Guide](#).

- Instructional materials
- Curriculum and curriculum materials
- Tuition and fees:
  - At an eligible private school
    - For full-time in-person learners (private school scholarship option students)
    - For part-time (PEP students only)
    - For hybrid private school program (for PEP students only)
  - For home education instructional program (for PEP students only)\*
  - At an eligible postsecondary institution
  - For dual enrollment



- For an approved pre-apprenticeship program
- For a full-time private tutoring program (for PEP students only)
  - At an approved online or virtual provider
  - As a private-pay student for Florida Virtual School
- Standardized testing fees, including test proctoring and administration
- Contracted services provided by a public school or school district
- Part-time tutoring and Choice Navigator services

Reimbursement requests submitted for an item or service not listed as an eligible expense may result in delayed processing or denial of the reimbursement if the request does not include an approved pre-authorization. More information is available below under [Pre-Authorization](#).

\* Note: For purposes of the scholarship program, a home education instructional program as an authorized use of funds is different than a home education program as defined in s. 1002.01(1), F.S.

## **General Purchasing Rules**

### **Making Successful Purchases**

Before making purchases out-of-pocket, submitting reimbursement requests, or ordering through MyScholarShop, parents and guardians should check to ensure:

1. The purchase is an eligible use of scholarship funds. (Note: If a purchase was previously approved due to error, under another program, or under a previous year's rules, that does not mean it will be approved in the future).
2. The student has sufficient funds in their account to cover the purchase.

The parent or guardian may view the student's account balance on the online statement provided in EMA. A family cannot receive reimbursements for amounts that exceed the available balance in the student's account.

Step Up For Students approves purchases and reimbursement requests in accordance with Florida statutes related to the scholarship program, rules set by the Florida Department of Education, and internal policies and procedures.

### **Pre-Authorization Requests**

Pre-authorization requests can be submitted for expenses planned in the future. Once a request is approved, it can be used to submit a reimbursement or to make a MyScholarShop purchase. (Note: the New Worlds Scholarship Accounts program does not allow reimbursements.)

Payment method information must be kept up to date in EMA to complete a pre-authorization.

Include detailed information about the item or service requested for pre-authorization, along with any supporting documents for the purchase.

Complete the Educational Benefit Form, including:



- **Student Name:** As it appears in the student's scholarship account.
- **Student ID Number:** In EMA under the "My Student" tab in the Student Profile.
- **Item for Reimbursement:** Specify the item to be reimbursed.
- **Educational Benefit:** Describe how this item will benefit the student's education.
- **Acknowledgement:** Read the acknowledgment statement and check the box to agree to the statement.
- **Parent/Guardian Name:** Print the parent or guardian's name.
- **Signature:** Sign the parent or guardian's name.
- **Submit:** Press submit to complete.

If the pre-authorization request is approved, the item or service on the proof of purchase must match the approved pre-authorization; otherwise, the request may be denied.

If the pre-authorization request is put on hold, log into EMA to see the reason why it was put on hold, provide the required information or documentation, and re-submit the pre-authorization request.

If the pre-authorization request is denied, the reason for the denial will be listed in EMA. Denied pre-authorization requests may not be appealed, so no further action may be taken.

The status of pre-authorization requests can be monitored in EMA.

## Educational Benefit Form

Some purchases require documentation of their educational benefit. This must be done through the Educational Benefit Form, [which is available here](#). Details about which purchases require the educational benefit form are available in the [purchasing guide](#).

Educational benefit is defined as supporting and advancing student learning. To be approved, an educational benefit form should clearly explain how the purchase will help the student learn.

Fields in EMA may ask for parents to provide information on the educational benefit of a purchase, but filling out these fields does not replace the need to fill out the [Educational Benefit Form](#).

In addition to educational benefit, Step Up For Students may consider the manufacturer's recommended minimum age to approve purchases or reimbursement requests, primarily for student safety purposes.

## Receiving Payments, Refunds or Rebates

Parents or guardians may not receive a payment, refund, or rebate of scholarship funds from a provider.

If a school, service provider or vendor issues payment, refund, or rebate to a parent or guardian, the funds must be returned to the student's scholarship account.



Parents and guardians may not keep the proceeds from selling an item purchased using scholarship funds. Proceeds of the sale must be returned to the student's scholarship account.

A check, made payable to Step Up For Students, indicating the scholarship student's name and student ID, should be sent to Step Up For Students at the following address:

Step Up For Students  
Attention: Accounts Receivable  
P.O. Box 54429  
Jacksonville, FL 32245-4367

If the funds are not returned to the student's scholarship account, the student could lose scholarship funding and eligibility for violating program rules.

### Frequency of Purchase Limitations

Program rules limit the frequency with which families can purchase certain items using scholarship funds.

These rules apply by calendar year. For example, a desk may have a two-year purchasing frequency, meaning a student who purchased a desk on November 10, 2024, will be eligible to purchase another desk using scholarship funds on or after November 11, 2026.

Frequency of purchase rules apply to all scholarship programs, even if a student changes programs. For example, if a parent or guardian purchased a desk with FES-UA funds on November 10, 2024, the student would not be eligible to purchase a desk using any other scholarship until November 11, 2026.

More details are available in the program [Purchasing Guide](#).

### Items that are Lost, Stolen or Broken Beyond Repair

If an item purchased with scholarship funds is broken beyond repair, it may be replaced with a similar item of equal or lesser value.

A parent or guardian must submit a pre-authorization request and documentation from a repair shop or service technician showing the item is beyond repair. Photos of the damaged item do not qualify as sufficient documentation.

If the item can be repaired, scholarship funds may be used to cover the cost of repair, but they cannot be used to cover the cost of a replacement.

If an item was stolen, a parent or guardian must submit a pre-authorization request and police report for review.

Replacement of lost devices will not be approved.

If a replacement item is authorized, the two calendar-year period will reset. For example, a student who purchased a television on July 10, 2024, but then is authorized to purchase and



purchases a replacement on October 10, 2025, will not be eligible to purchase another television using scholarship funds until on or after October 11, 2027.

## **Direct Payment to Eligible Private Schools**

### **Full-Time Eligible Private School Students**

Students with a private school scholarship (all FES-EO students and non-PEP FTC students) must enroll in a participating private school through EMA. A list of schools eligible to serve scholarship students can be found in the [Florida Private Schools Directory](#).

Once a student's enrollment is confirmed, the school can receive payment of scholarship funds by submitting an invoice for tuition and fees and the parent or guardian has approved payment to the school.

Step Up commits eligible private school tuition and fees from student's account quarterly before a parent or guardian can access any remaining scholarship funds.

**Note:** If a school charges more than a student's scholarship amount for tuition and fees, families may pay for the difference using rollover funds in their account

### **Individual Classes, Extracurricular Activities, or Services at an Eligible Private School**

Students enrolled full-time at an eligible private school may use any scholarship funds remaining after paying for full-time tuition and fees to take individual classes or participate in extracurricular activities at a different eligible private school.

Students who wish to do so must not enroll in multiple private schools as a full-time student.

Each class or activity must be paid for through the school's EMA marketplace account or by reimbursement.

- Eligible expenses include: academic services, athletics/clubs/activities participation, individual classes, and testing.

Payments made to a private school that is not approved by the Florida Department of Education to participate in a student's scholarship program cannot be reimbursed.

### **Part-Time PEP Students**

PEP students may also enroll part-time in eligible private schools they attend in-person. Eligible private schools may choose to accept direct payment by creating service offerings in the EMA Marketplace.

The school must accept the FTC Scholarship to provide part-time enrollment to PEP students. A list of schools eligible to serve scholarship students can be found in the [Florida Private Schools Directory](#).



PEP scholarship students may pay for part-time private school classes directly through the EMA Marketplace for participating schools. PEP scholarship students may not utilize the school enrollment function in EMA, which is for full-time, in-person learners only.

### **PEP Hybrid Eligible Private School Students**

PEP students may also enroll in PEP Hybrid eligible private schools they attend in-person at least two full school days per week if their Student Learning Plan addresses the remaining instructional time. Eligible private schools may accept direct payment by creating service offerings in the EMA Marketplace.

PEP Hybrid eligible private schools must meet state eligibility requirements and receive approval to participate in the program with the Florida Department of Education.

**Note:** Not all FTC participating schools are PEP Hybrid eligible private schools. A list of PEP Hybrid private schools eligible to serve PEP students can be found in the [Florida Private Schools Directory](#).

PEP scholarship students may pay for PEP Hybrid eligible private school programs directly through the EMA Marketplace for participating schools. PEP scholarship students may not utilize the school enrollment function in EMA.

Note: Full-time enrollment in a PEP Hybrid eligible private school is not the same as full-time enrollment in a traditional eligible private school, which is prohibited under PEP. PEP Hybrid eligible private schools must be approved by the FLDOE to participate.

### **Direct Payment for Services**

Step Up For Students allows parents and guardians to pay directly for some eligible educational services. Providers wishing to participate in direct payment for educational services from scholarship students must set up an account in EMA and submit a service catalog.

Requests for payment directly to a provider may only be approved after the service has been rendered.

### **MyScholarShop**

Step Up For Students has developed [MyScholarShop](#), an e-purchasing platform where parents or guardians can purchase pre-approved items without any upfront cost.

MyScholarShop will become accessible within a few weeks after funds are deposited into a student's account. Parents or guardians can log in to EMA to access MyScholarShop.

If an item is not in MyScholarShop or the program [Purchasing Guide](#), it may still be an eligible expense. If an item is in MyScholarShop, it may not be an eligible item for all scholarship programs for direct purchasing or reimbursement. Additionally, if a parent purchases an item out of pocket that is identical to one within MyScholarShop for a lesser amount, the parent must be reimbursed for that item if it is eligible for their scholarship program.





Parents or guardians should submit a pre-authorization form if they are unsure an item is eligible.

## MyScholarShop Guidelines

- The parent or guardian should ensure they have enough available funds in the student's scholarship account to cover the entire purchase.
- These policies, including pre-approval of items available for purchase through MyScholarShop, do not apply to in-store purchases or purchases from vendor websites.
- If an item requires pre-authorization, the pre-authorization request must be approved before a parent or guardian places the order. The approved pre-authorization number must be included in the appropriate field to avoid a delay or denial of order.
- If an item has an associated purchasing rule, such as size, quantity, or frequency limitation, those same rules apply in MyScholarShop.
- The parent or guardian should include all purchases in a single order.
- MyScholarShop orders will ship to the physical address listed in the guardian profile in EMA.
- Step Up For Students reserves the right to deny requests.
- MyScholarShop will become accessible once funds are deposited into a student's account. Parents or guardians can log into EMA to access MyScholarShop.

## MyScholarShop Returns

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

Individual vendors list their return policies and instructions in MyScholarShop.

Once the vendor has received the item, it may take up to a few weeks for the funds to be credited to the student's scholarship account.

## Status Definitions

Below is a glossary of the statuses that describe the progress of an order in MyScholarShop.

- **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 fulfill.
- **Cancelling:** Order was cancelled after it was placed.
- **Cancelled:** Order was cancelled after it was submitted and approved.
- **Receiving:** Ordered items have been shipped and are in the process of being delivered.
- **Received:** Ordered items have been shipped and delivered.



## **Submitting Reimbursement Requests**

Parents and guardians who choose to pay for eligible tuition, fees, items or services out of pocket may apply to have those expenditures reimbursed from their student's scholarship account.

Step Up For Students approves reimbursement of items within the guidance of Florida statutes related to the scholarship program, as well as Florida Department of Education rules and Step Up For Students policies and procedures and reserves the right to close or deny any reimbursement request submitted for payment.

Step-by-step instructions for submitting a reimbursement request in EMA are [available here](#).

## **Reimbursement Timing**

Reimbursement requests are year-specific. Requests for reimbursements using scholarship funds from the 2024-25 school year may be submitted at any time after the purchase is made, as long as the items or services were purchased between July 1, 2024, and June 30, 2025.

In addition, reimbursements for purchases made in the following categories between July 1, 2023 and June 30, 2024 are eligible for reimbursement with scholarship funds.

- Eligible Private School Tuition and Fees (including individual classes or extracurricular activities at an eligible private school other than the school the student attends on a full-time basis)
- Home Education Instructional Program Tuition and Fees
- Public School Contracted Services
- Full-Time Private Tutoring
- State-Approved Virtual Instruction Provider
- State-Approved Online Course
- Curriculum

In these instances, reimbursements should be submitted during the school year in which the service is rendered (or curricula is used), but the proof of purchase may be from the immediately preceding fiscal year.

For example, if a student receives instruction from a home education instructional program during the 2024-25 school year, a parent or guardian should apply for reimbursement between July 1, 2024 and June 30, 2025, but the proof of purchase may be dated July 1, 2023 or later.

This policy is intended to help families cover expenses they paid for in advance in preparation for the 2024-25 school year.

Students funded at any point during the 2024-25 school year can submit reimbursements for purchases dated between July 1, 2024 and June 30, 2025.

Please allow up to 60 days for a reimbursement request with the required supporting documentation to be fully reviewed.



## Reimbursement Status Definitions

As a reimbursement is processed in EMA, it will progress through three statuses:

- **Submitted:** Step Up For Students has received the reimbursement request for the identified purchase.
- **In Review:** Step Up For Students is reviewing the reimbursement request.
- **Completed:** Step up For Students has reviewed the reimbursement request, and a decision on the reimbursement request is pending.

Once the reimbursement is completed, it will be flagged as:

- **Approved:** The reimbursement request will be fulfilled for the identified purchase, and payment is on the way.
- **Denied:** The reimbursement request will not be fulfilled for the identified purchase. Step Up For Students will provide the denial reason via email to the email address in EMA. Common denial reasons include incorrect or insufficient documentation for the purchase, or the purchase was submitted using the wrong category. More information about appealing a denied reimbursement is available in [Appeals](#).
- **On Hold:** The reimbursement request needs further action, information, or documentation from the parent or guardian. Step Up For Students will provide information via email to the email address in EMA.

If additional documents are requested for an On Hold reimbursement and none are submitted within 30 days, it will automatically be denied, and the parent or guardian will need to submit a new reimbursement request.

## Advance Reimbursement

Parents or guardians can apply for reimbursement for services up to three months in advance. For example, if a tutor asks for payment in advance, a parent can apply on September 1 for reimbursement of tutoring fees paid through the end of November.

Requests submitted for services more than three months in advance may be approved through the remainder of the school year, up to one year, if the provider attests that the services paid in advance are non-refundable.

Parents or guardians must submit a signed and dated letter from the provider stating the payment is non-refundable or submit published policies from the provider showing these requirements.

## Required Supporting Documentation

For a reimbursement request to be approved, the parent or guardian will need to show that:

1. Proof of payment.
2. The purchase is a qualified use of scholarship funds.



Step Up For Students may request additional documentation or clarification when the reimbursement request is reviewed. The parent or guardian will be notified via email to the email address in EMA.

### **Proof of Payment**

The following documents can serve as proof that the parent or guardian paid for the purchase:

- Credit card receipt showing the full transaction date (mm/dd/yy), provider name, and amount.
- Credit card/bank statement showing the full transaction date (mm/dd/yy), provider name, and amount.
- PayPal receipt showing the full purchase date (mm/dd/yy), provider name, amount, and funding source.
- Copy of the front and back of the cleared check showing the full payment date (mm/dd/yy), provider name, and amount. When submitting a copy of a cleared check, black out the routing and account numbers.

An invoice that does not show it has been paid in full and does not show the means of payment (such as the number of the credit or debit card used), will not count as proof of payment.

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

### **Proof of Payment for Private School Tuition Using Tuition Management Systems**

A private school's tuition management system (e.g. FACTS, Blackbaud, TADS) may include the information needed to provide proof of payment.

The billing statement should include:

- School's name and address
- Scholarship student's first and last name as listed in EMA
- Description of each payment to be reimbursed (including but not limited to: tuition, registration fee, book fees, etc.)
- Date of full payment (mm/dd/yy)
- Amount of each transaction.

A tuition management system account may show activity related to multiple students and transactions. Each reimbursement request should include the specific scholarship student, and the specific transactions, for which the parent or guardian is seeking reimbursement.

If a private school's tuition management system groups students by family and does not show spending for individual students, a parent or guardian can submit an invoice from the school with appropriate documentation as stated in [Tuition and Fees at an Eligible Private School](#).



### Cash, Checks and Private Sellers

Cash payments to a provider require a signed, dated letter from the provider on their letterhead that includes:

- Provider's name
- Scholarship student's first and last name
- Description of service (tuition, registration, etc.)
- Date of full payment (mm/dd/yy)
- Amount of purchase
- Method of payment (cash/check)

Requests for reimbursement of cash purchases from private sellers that are not affiliated with a company or institution (garage sale, Facebook Marketplace, Craigslist, private tutors) 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.

When submitting a cashier's check, a copy of the cashier's check or a bank receipt confirming the purchase is required.

### Payment with Credit Card Points, Gift Cards and Cash Equivalents

Purchases made using reward or loyalty points, credits or gift cards may only be eligible for reimbursement if the proof of payment clearly shows the cash value of the payment method.

For example: A parent or guardian makes an eligible purchase for \$40.48. They pay \$30 with their credit card and \$10.48 using reward points.

They can be reimbursed for the full purchase price of \$40.48 if the receipt from their purchase clearly shows a full price of \$40.48, and the full purchase was for eligible expenses.

If the receipt does not show the full purchase price, they can only be reimbursed for \$30 – the portion paid with a credit card.

### Reimbursement for Installment Payments

If an approved purchase is made using layaway, an installment plan, or a buy now, pay later service such as Klarna or Affirm, Step Up For Students cannot reimburse the full purchase amount until all payments have been made.

However, each installment payment on the approved purchase is eligible for reimbursement once the payment has been made.

Note: Parents or guardians utilizing a payment plan for Florida Theme Park admission must wait until the ticket or pass has been paid in full (or up to \$299) before submitting their reimbursement request.



## Documenting Eligible Uses of Scholarship Funds

Each purchase category has specific requirements for documentation demonstrating that it qualifies as an eligible use of scholarship funds.

Details on eligible uses of scholarship funds are available in the program [Purchasing Guide](#).

### Instructional Materials and Curriculum or Curriculum Materials

The invoice or receipt must include:

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

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

### Physical Education (P.E.)

The invoice or receipt must include:

- Scholarship student's first and last name\*
- Instructor's first and last name or provider's company/league name
- Type of service rendered
- Any date format that lists the calendar month(s) and year when instruction took place and hours of instruction
- Service rate
- Method of payment (see [Proof of Payment](#) section).

\*The scholarship student's first and last name are required for classes, instructional services or lessons. They are not required for purchased goods, rentals, or general admission tickets.

### Electives and Enrichment

Reimbursement requests for elective classes, enrichment or lessons must include documentation demonstrating the provider meets the requirements for part-time tutoring or Choice Navigator services, or has one of the following:

- A valid or expired Florida educator's certificate
- Minimum of three years of experience in the relevant subject area as demonstrated by employment records
- Currently enrolled in a postsecondary educational institution as a student of the relevant subject area
- Degree from a postsecondary educational institution in the relevant subject area
- Certification or national accreditation in the relevant subject area

Additionally, the invoice or receipt must include:



- Scholarship student's first and last name
- Instructor's first and last name
- Provider's company name, if applicable
- Type of service rendered
- Any date format that lists the calendar month(s) and year when instruction took place and hours of instruction
- Service rate
- Method of payment (see [Proof of Payment](#) section).

### Approved Pre-Apprenticeship Program

The invoice or receipt on craftsperson/company letterhead must include:

- Scholarship student's first and last name
- Name of the FLDOE-approved pre-apprenticeship course
- Craftsperson name, and company name (if applicable) and license number or listed on FLDOE website
- Any date format that lists the calendar month(s) and year when instruction took place and hours of instruction
- Program rate
- Total amount due for the service
- Method of payment (see [Proof of Payment](#) section)

### Full-Time Private Tutoring Program (PEP Students Only)

Full-time private tutoring is an option for students to satisfy state attendance requirements outlined in s. [1002.43](#), F.S. Parents must select a credentialed provider and participate in a minimum number of instructional hours by grade level.

The invoice or receipt on business letterhead must include:

- Scholarship student's first and last name
- Tutor's first and last name
- Tutor's DOE certification number
- Tutor's company name, if applicable
- Any date format that lists the calendar month(s) and year when instruction took place and hours of instruction
- Tutor's hourly rate
- Total amount due for the service
- Method of payment (see [Proof of Payment](#) section)

The invoice or receipt must also show that the reimbursement is for full-time tutoring, and the parent must ensure they are seeking reimbursement under the full-time tutoring category.

To ensure correct processing, each reimbursement request should include documentation of the service provider's license number and/or credentials.



For their services to be eligible for reimbursement, full-time tutors who have not previously received payment via scholarship funds will be required to submit a Step Up For Students [Full-Time Tutor Participation Agreement](#) and W-9. Parents or guardians should consult with their provider.

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

The invoice or receipt on business letterhead must include:

- Scholarship student's first and last name
- Tutor's or choice navigator's first and last name
- Tutor's company name, if applicable
- Type of service rendered
- Any date format that lists the calendar month(s) and year when services took place and hours of services
- Tutor's hourly rate (not required for Choice Navigator services)
- Total amount due for the service
- Method of payment (see [Proof of Payment](#) section)

To ensure correct processing, each reimbursement request should include documentation of the service provider's license number and/or credentials.

### **Documentation of Credentials**

To qualify as a part-time tutor or a Choice Navigator, a provider needs to document their credentials.

If the provider of these services has not already been approved in EMA, reimbursement requests for these services should include documentation of their credentials.

Options for acceptable documentation are detailed in the program [Purchasing Guide](#).

### **Contracted Services Provided by a Public School or District**

The reimbursement request must include:

- Scholarship student's first and last name
- Name and address of the school
- Services provided
- Any date format that lists the calendar month(s) and year when services were provided and hours of services
- A statement showing the amount paid (or billed)
- Proof of payment (see [Proof of Payment](#) section)

### **Tuition and Fees at an Eligible Private School**

Requests for reimbursement of tuition and fees at an eligible, participating private school submitted by the parent or guardian must include a complete invoice and proof of payment containing the following information:

- Tuition and fee rates
  - School's published tuition and fee rates





- Annual tuition rate for the scholarship student
- Invoice that includes:
  - Name and address of the private school
  - Scholarship student's first name and last name (The student's name on the invoice must match Step Up For Student's records. Nicknames, middle names as first names, etc. are not accepted.)
  - Date of invoice
  - School year the payment is for
  - Proof of Payment (see [Proof of Payment](#) section)
  - Itemized charges for each tuition or fee payment

The program [Purchasing Guide](#) lists prohibited and eligible fees. School lunch and before- and after-school care are not covered.

PEP students may not enroll full-time in a private school, but they may enroll in part-time classes or PEP Hybrid eligible private school programs that are approved to participate in the PEP Scholarship Program.

If the private school uses a tuition management system (e.g. FACTS, Blackbaud, TADS), only the annual fee for use of the billing service will be eligible for reimbursement. Any fees charged for use of a credit card will not be reimbursed.

If a student withdraws or transfers, refunds (if any) will be based on the school's policy and must be paid back to Step Up For Students for credit to the student's scholarship account. The parent or guardian may not accept refunds of scholarship dollars from the school.

Tuition and/or fees paid to an ineligible private school that does not participate in the scholarship program are not eligible for reimbursement.

### **Tuition and Fees as a Private-Pay Student for Florida Virtual School (FLVS)**

The reimbursement request must include:

- Scholarship student's first and last name
- Name of course paid for (or billed)
- Any date format that lists the calendar month(s) and year when instruction took place and hours of instruction
- A statement showing the amount paid (or billed)
- Proof of payment (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.

### **Tuition and Fees for an Eligible Postsecondary Institution, a Home Education Instructional Program (PEP Students Only), an Approved Online or Virtual Provider**

Reimbursement requests must include:

- Scholarship student's first and last name
- Name of the institution or course provider



- Course description
- Any date format that lists the calendar month(s) and year when instruction took place and hours of instruction
- Amount of tuition and fees
- Proof of payment, on institutional letterhead, if applicable (see [Proof of Payment](#) section)

### **Fees for Standardized Testing, Including Test Proctoring and Administration**

Reimbursement requests must include:

- Scholarship student's first and last name
- Date of the evaluation/test, including year
- Description of the services provided
- Amount of fees for the evaluation/test
- Documentation of the teacher's FLDOE certification number
- Proof of payment (see [Proof of Payment](#) section).

### **Reimbursement Mechanism**

Once approved, reimbursements can be paid to a parent or guardian from the student's scholarship account via direct deposit (ACH), check, or PayPal.

If direct deposit (ACH) is selected, the parent or guardian will be asked to submit personal banking information. If an ACH payment is rejected by the banking institution, the funds will revert to the student's scholarship account after 30 days.

Reimbursements for multiple scholarship students on multiple scholarship programs will be paid separately.

More information about reimbursement payments [is available here](#).

### **Appeals**

If a reimbursement request is denied, the parent or guardian may appeal the decision once by submitting a new reimbursement request, noting in the description box it is an appeal or reconsideration request, and providing additional documentation.

After the appeal decision is made, additional appeals for the same item will not be reviewed.

Appeals will only be reviewed through the established process. Step Up For Students is unable to review appeals or resubmission requests that are sent via email or through any other customer service channel.

Reimbursement requests placed on hold for longer than 30 days after a request for additional documentation will be denied and require resubmission.

### **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 or reimbursement documentation.
- Failure to satisfy state compulsory attendance 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. With the exception of renewal PEP scholarship students of active-duty members of the United States Armed Forces with Permanent Change of Station (PCS) orders to move out of Florida.
- Enrolling in a public school, including the Florida Virtual School, the Florida School for the Deaf and Blind, the College-Preparatory Boarding Academy, the Florida School for Competitive Academics, the Florida Scholars Academy, a developmental research school, a charter school, or any other Florida public school, on a full-time basis. 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, resale, 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 as a full-time, in-person private or public-school student.
  - Failure to submit or maintain a Student Learning Plan for the student.
  - Failure to take or submit assessment results to Step Up For Students from the prior school year (for renewal students).

The above actions, or any violation of scholarship statutes, rules, policies, or procedures may result in the loss of the scholarship, loss of future scholarship eligibility, and/or financial or criminal penalties.

### **For More Information**

- [Document Library](#)
- [Resources Page](#)
- [FTC/FES-EO Scholarship Information](#)
- [PEP Scholarship Information](#)
- [FTC/FES-EO/PEP Handbook Feedback Form](#)
- [FTC/FES-EO Purchasing Guide](#)
- [Program Facts](#)
- [Find a School Tool](#)
- [Scholarship Decline Form](#)
- [Educational Benefit Form](#)



## **Videos**

- [About the PEP scholarship](#)
- [How to complete and upload a PEP Student Learning Plans](#)
- [How to upload a PEP assessment](#)

## **Contact Information**

Step Up For Students wishes all scholarship students a productive and fun-filled 2024-25 school year.

There are three ways to reach Step Up For Students:



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



Call (877) 735-7837



Submit inquiry through [Contact Us](#)

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