



Florida Choice Scholarships

# PRIVATE SCHOOL HANDBOOK

(Private School Providers)





## Welcome

This handbook is designed to help eligible private schools navigate the Florida Tax Credit (FTC) Scholarship, Family Empowerment Scholarship for Educational Options (FES-EO), and students enrolled in a private school while participating in the Family Empowerment Scholarship for Students with Unique Abilities (FES-UA) programs.

If you need assistance along the way, our team is ready to help. The Step Up For Students Customer Engagement Center is available Monday through Friday from 8:00 a.m. to 5:00 p.m. EST to support providers with any questions or concerns.

You can connect with us by:



[Inquiry Form](#)

Send us a question or message online



(877) 735-7837

Speak directly with a team member



[Live Chat](#)

Click the red “Chat with Us” tab on the right-hand side of our website



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

**Table of Contents**

Welcome ..... 1

Overview ..... 4

About Step Up For Students..... 4

    Our Work ..... 4

    Our Mission ..... 4

Scholarship Eligibility Requirements ..... 4

    How Students Apply..... 5

    Accepting The Scholarship ..... 5

    Award Notification ..... 5

    Private School Obligations For Admitting Students ..... 5

    Multiple Applications Prohibited ..... 6

Funding For Scholarships ..... 6

    Funding Amounts ..... 6

    Scholarship Funding Proration ..... 7

    Scholarship Funding Schedule ..... 7

Authorized Uses of Scholarship Program Funds..... 8

Eligible Private Schools..... 8

    Setting Up An Account In EMA ..... 9

    Adding Tuition & Fees In EMA ..... 9

    Direct Billing In EMA..... 10

        Full-Time, In-Person Eligible Private School Students..... 10

Invoice Approval Requirement..... 11

    Part-Time PEP Eligible Private School Students ..... 12

    Individual Classes, Extracurricular Activities, or Services At An Eligible Private School..... 12

    PEP Hybrid Eligible Private School Students..... 13

    Students Transferring Schools ..... 13




---

Annual Assessment Requirements.....	14
Payment Options.....	14
Direct Payment For Services.....	14
Reimbursement Requests.....	15
Reimbursement Documentation.....	15
Reimbursement Timing.....	15
Advance Reimbursement.....	16
School Rights & Responsibilities.....	16
Agreed-Upon Procedures.....	16
Data Confidentiality.....	16
Data Security.....	17
Maintaining Up-To-Date Contact Information.....	17
Compliance.....	17
Schools.....	17
Contact Step Up For Students.....	17
For More Information.....	18
Appendix A—Authorized Uses of Scholarship Funds Chart.....	19



## Overview

The Florida Tax Credit (FTC) Scholarship, Family Empowerment Scholarship For Educational Options (FES-EO), and Family Empowerment Scholarship For Unique Abilities (FES-UA) are scholarships that help parents and guardians customize their student's education.

Any Florida students who are eligible to enroll in a public school for kindergarten through 12<sup>th</sup> grade are eligible for FTC or FES-EO. Students who also have qualifying disabilities are eligible for FES-UA. For more information on qualifying for an FES-UA scholarship, see the [FES-UA Parent & Guardian Handbook](#).

The FTC, FES-EO, and FES-UA scholarships allow families to pay private school tuition and fees. Families may use the remaining funds for other education-related expenses allowed by law.

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 guide schools approved by the Florida Department of Education who offer services to scholarship students.

## About Step Up For Students

### Our Work

Step Up For Students is a nonprofit Scholarship Funding Organization approved by the state of Florida to administer the Florida Tax Credit, Florida Empowerment Scholarship for Educational Options, and Personalized Education Program and other education choice programs.

To explore the various programs administered by Step Up For, we invite you to watch these helpful [videos](#).

### Our Mission

Beyond administering scholarship programs, our mission is to empower families to access the best possible learning options for their children. Since 2002, we have worked to be deeply integrated in the community, highlighting innovation in education and sharing inspiring family stories. To learn more about how we put our mission into action, please visit our [website](#).

## Scholarship Eligibility Requirements

The FTC and FES-EO 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, and
- Eligible to enroll in grades K-12 in a Florida public school or recipients of a Hope Scholarship in the 2023-2024 school year.



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

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.

### How Students Apply

Before students can apply, they'll need to set up an account in **EMA (Education Market Assistant)**, Step Up For Students' secure online platform.

#### With EMA, they can:

- Apply for the scholarship
- Upload required documents
- Track scholarship funds
- Approve private school tuition and fee payments
- Submit reimbursement requests

Private schools are prohibited by law from creating or managing EMA accounts for families. Parents and guardians are responsible for completing the student application and submitting required documentation directly through EMA.

#### ⚠ Important:

- **Schools and Providers Cannot Apply on the Student's Behalf:** Schools and providers also cannot request or use the student's EMA login credentials.
- **Penalties:** Doing so may result in loss of scholarship eligibility for the student or penalties for the provider.

Private schools should be aware of application and funding timelines each year, as enrollment confirmations and invoice submissions in EMA are tied to those dates.

### Accepting The Scholarship

Upon receiving notification from Step Up For Students that the student is eligible, Florida law requires the parent or guardian to accept or decline the scholarship by a certain date. The parent or guardian must log into their EMA account to accept or deny the scholarship.

#### Award Notification

After the scholarship has been accepted, Step Up For Students will notify the parent or guardian by email and on a rolling basis whether their student has been awarded a scholarship or if the scholarship program has reached capacity.

### Private School Obligations For Admitting Students

Schools must provide to the SFO all documentation required for a student's participation in the scholarship, including

- Confirmation of the student's admission to the private school,
- The private school's and student's fee schedules, and



- Any other information required by the organization to process scholarship payment

This information must be provided by the deadlines established by the SFO and in accordance with the requirements of Florida statute section 1002. A student is not eligible to receive a quarterly scholarship payment if the private school fails to meet the established deadlines.

### 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 has applied for one scholarship for their student and would like their student to participate in a different scholarship program, they must decline the first scholarship before applying for a different one. The only exception to this is students who want to switch from a private school scholarship to a Personalized Education Program (PEP) scholarship or vice-versa. Those families should contact Step Up For Students to request a program switch.

If a student attends an eligible private school, parents and guardians should communicate with their child's school before changing scholarship programs to confirm which scholarships the school accepts. If the student is leaving their private school to use a different scholarship, their parent or guardian must contact the school to withdraw the student's enrollment before they are able to decline their scholarship.

### Funding For Scholarships

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

Funding for the FES-UA and FES-EO Scholarship comes from the State of Florida.

### Funding Amounts

Scholarship funding amounts are determined by the Florida Legislature annually. Step Up For Students will publish the funding amounts as soon as they are available. In the meantime, families may refer to this [2025-2026 funding chart](#) for a general idea of funding amounts from the immediately preceding school year. To understand how the scholarship funding amount is determined, please see the information below.

The amount of scholarship funding a student receives is based on multiple factors:

- The student's grade level
- The student's county of residence
- The level of special education services they receive (for FES-UA students only)

The funding amount, based on the student's grade level and county of residence as entered by the parent on the application, will be determined with Quarter 1 funding, and any grade level or county changes made after Quarter 1 funding will not impact funding for that school year.

Please note: Scholarship funding is not based on the grade level entered in the school enrollment in EMA; it is determined by the expected grade level entered by the parent in the application.



## Scholarship Funding Proration

To receive scholarship funding, students using the private school option must confirm enrollment at an eligible private school in EMA.

Scholarship funding is prorated based on the dates when the student accepts a scholarship and approves their enrollment in EMA:

- Students who accept a scholarship and approve their enrollment in EMA by September 30, 2025, will receive 100% of the total award amount for that school year
- Students who accept a scholarship and approve their enrollment in EMA by January 15, 2026, will receive 50% of the total award amount for that school year

Students who do not accept a scholarship and approve their enrollment in EMA by January 15 will not receive scholarship funding for the 2025-2026 school year.

## Scholarship Funding Schedule

Scholarship funds are deposited into the student's scholarship account on a quarterly basis.

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

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

Enrollment Deadline	Funds Delivered To Step Up For Students
June 15*	August 1*
July 15*	September 1*
September 30	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 For Students 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 school is expecting an invoice, but has not yet received it, or needs to delete or edit an invoice, the school should [contact the Customer Engagement Center](#).

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

Once the tuition and fee amount is paid to the private school, students with additional funds available in their accounts may use them for other eligible expenses. More information is available



below in Authorized Uses of Scholarship Program Funds or the program Purchasing Guide, found [here](#).

If Step Up For Students overpays or makes a payment in error to a school, Step Up will recover excess funds by adjusting future payments to the school. If a school is overpaid after a student switches scholarship programs during the school year, Step Up will reduce a subsequent payment to the school, potentially in the following quarter, to account for the overpayment.

### **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.

If a parent or guardian receives a refund or rebate 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.

The following categories of items and services are approved uses for the scholarship funds. Eligible expenses and credentialing details are outlined in the Purchasing Guide, found [here](#).

- 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 (for PEP students only)
    - For hybrid private school 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
- Contracted services provided by a public school or school district
- Part-time tutoring and Choice Navigator services

### **Eligible Private Schools**

An “eligible private school” is defined in Florida Statute [1002.395\(2\)\(i\)](#) as a private school located in Florida that educates students in any grades K-12 and meets the requirements of state laws governing [private schools](#) and scholarship programs.

If a private school fails to meet the requirements in state law, the state education commissioner may determine that the private school is ineligible to participate in the scholarship program.



Tuition and fees or services paid for by a parent or guardian to an ineligible private school that does not participate in the scholarship program are not eligible for reimbursement.

Private schools interested in serving students through the FTC, FES-EO, or FES-UA scholarships must register with the Florida Department of Education and complete the requirements for those programs.

Private schools interested in serving PEP students in a PEP Hybrid program must register with the Florida Department of Education and complete the requirements for PEP Hybrid schools. Please see the [PEP Hybrid External Guide](#) for more information.

Schools can call the Florida Department of Education toll-free hotline at (800) 447-1636, contact their local Florida Department of Education [Regional Managers](#) or visit [Requirements for Participating in State Scholarship Programs](#).

## Setting Up An Account In EMA

Eligible private schools should not create their own provider account in EMA. A unique invitation link will be sent to the school via email once a school is approved by the Florida Department of Education. Once the school receives the link, an EMA account can be created.

When creating an account, the dashboard options will be limited until the profile setup is complete. Some school information will auto-populate based on Florida Department of Education records. As an eligible, participating private school providing full-time education, setting up an EMA account will require payment information including your account type, email, phone number, full name, and complete address. As part of the EMA account creation for eligible private schools, an electronic W-9 must be completed. Please ensure the information entered on the digital version matches what is on file with the Internal Revenue Service (IRS).

Account users will have the ability to make changes to the school's profile. Account contacts will receive general communication from EMA. The email address and phone number for each account contact and account user should be unique to that individual. An account user's email address can only be used at one school. A different account user email address must be entered when setting up an account in EMA for a school with multiple locations. The physical address of each location must match what is on file with the Florida Department of Education.

Note: Account contact and account user email addresses cannot be used as parent or guardian or provider account email addresses.

## Adding Tuition & Fees In EMA

Once an eligible private school has an account created in EMA, tuition and fees may be added by doing the following:

1. Input the maximum tuition amount for each grade level approved to serve under the "Tuition" tab.



- Additional tuition and fees should be entered for any applicable eligible fees (listed below) for scholarship students that will enroll.
  - Schools can create a specific tuition and fees group to streamline the invoicing process (e.g., multi-student discount, parishioner discount, employee discount, etc.).
  - Fees included in a school's tuition and fee schedule must be required for enrollment.
2. Submit tuition and fee schedule. Once submitted, and the tuition and fees are reviewed by Step Up For Students, the school's account in EMA will reflect a "Verified" status.
  3. Begin to enroll students (see below).

#### **Eligible fees include:**

- Academic services fee
- Activity fee (i.e. choir, band, etc.)
- Application fee (payable in the fiscal year preceding the academic year)
- Athletics fee
- Club fee
- Book fee
- Enrollment fee
- Graduation fee
- Other fees as unique to the needs of the student, including transportation, enrollment, field trip, supplies and materials, ESE or special needs services, and therapy fees
- Registration fee (payable in the fiscal year preceding the academic year)
- Security fee
- Technology fee
- Test fee
- Uniform fee (basic uniform pieces purchased from a school-required vendor and sports uniforms)

#### **Prohibited fees:**

- Annual funds
- Before- or after-school care
- Costs associated with scholarship management
- Food fees (i.e. lunch)
- Fundraising fee/donation fee/volunteer waiver fees
- Giving funds
- Optional fees
- Shoes and accessories fees

## **Direct Billing In EMA**

### **Full-Time, In-Person Eligible Private School Students**

Eligible private schools serving students with a private school scholarship must establish tuition and fees and enroll all full-time, in-person FES-EO and FTC scholarship students. FES-UA students have the option of enrolling through EMA or paying out of pocket and submitting for reimbursement.



Enrollment in EMA will allow schools to invoice scholarship funds directly from students' accounts quarterly. Step Up For Students commits the total amount of tuition and fees, up to the amount of funding a student was awarded that school year, to the selected school. Step Up For Students bills the student's account quarterly for tuition and fees before a parent or guardian can access any remaining scholarship funds.

When 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 for the student may include discounts or other considerations. The rate can be less, but not more than the school's published maximum tuition and fee rate for the student's grade level. 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.

The agreed-upon tuition and fee rate for a student in EMA should not exceed any amount the parent or guardian has agreed to pay the eligible private school.

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.

Eligible private schools may charge more than the value of the scholarship, and in some cases, may decide to provide scholarship students with supplemental financial assistance at their own discretion. Schools should work with parents and guardians if they are required to pay the difference between the value of the scholarship and the full tuition and fees.

**Note:** If a school charges more than a student's scholarship amount for tuition and fees, families may choose to pay for the difference using rollover funds in their account. To be paid directly from scholarship funds, the school must set up a separate tuition and fees service offering as a provider in EMA. A video with details on how schools can navigate the EMA Marketplace is [available here](#).

### Student Award Details

Parents and guardians with students enrolled in a full-time, in-person, eligible private school will need to provide an Award ID to the school at which they wish to enroll. Upon enrollment in EMA, the school can review the expected payment for that student, which will be the lower of the enrolled tuition and fees or the student's annual award amount. Parents and guardians are not required to provide award amounts to schools. More information about scholarship amounts is available in [Scholarship Amounts](#).

### Invoice Approval Requirement

Parents and guardians must approve private school tuition and fee invoices in EMA within 30 calendar days of the school submitting them.



- If the invoice is not approved within this time frame, it will be deleted.
- For students funded under FES-EO, the funds are returned to the Florida Department of Education.
- For students funded under FTC, the funds are returned to the funding source
- For students funded under FES-UA, the funds are returned to the student's scholarship account.

**⚠ Important:** Schools should remind families to approve invoices promptly. If a parent does not approve an invoice required for enrollment, the student will not be eligible for funding for the rest of that scholarship year.

### **Part-Time PEP Eligible Private School Students**

Eligible private schools may serve PEP students if the students attend in-person, part-time. Schools may choose to accept direct payment by creating service offerings in the EMA Marketplace. Schools may not enroll part-time PEP students in EMA, as private school enrollment is for full-time, in-person learners only.

The eligible private school must accept the FTC Scholarship to provide part-time enrollment to PEP students.

Note: A virtual, remote, or online instruction program provided by a private school is not an eligible expense for scholarship funds. An eligible private school may not receive funds for these services and may not submit such service in the EMA Marketplace.

DOE-approved online and virtual providers may provide these services through the EMA Marketplace but are not eligible to set up as an eligible private school and enroll students in EMA. Providers wishing to offer virtual instruction to scholarship students must complete the approval process outlined [here](#) to be approved by the Florida Department of Education before submitting their services as a service offering in EMA.

### **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 the other private school 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, 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.



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

Eligible private schools may also enroll PEP students in PEP Hybrid learning if they attend in-person at least two full school days per week and their Student Learning Plan in EMA addresses the remaining instructional time. PEP Hybrid eligible private schools may choose to accept direct payment by creating service offerings in the EMA Marketplace but may not utilize the school enrollment function in EMA, which is for full-time, in-person learners only.

Not all FTC participating schools are PEP Hybrid eligible private schools. PEP Hybrid eligible private schools must be approved by the Florida Department of Education to participate. Schools can call their toll-free hotline at (800) 447-1636, contact local [Regional Managers](#) or visit [Requirements for Participating in State Scholarship Programs](#).

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 the PEP program.

### **Students Transferring Schools**

Enrollment at an eligible private school in EMA is required for full-time, in-person private school scholarship students. Students utilizing the private school scholarship (FTC or FES-EO) may transfer their scholarship among eligible participating private schools. If a parent or guardian is not satisfied with the private school they have chosen, they may find another one.

If a parent or guardian requests to withdraw or transfer their student from a school, the school should provide their withdrawal or transfer policies. Once the student has withdrawn or transferred, the school must promptly unenroll the student in EMA. A student cannot be enrolled in a new eligible private school in EMA until they have been withdrawn from the prior school in EMA.

The transfer process may include a final payment to the private school the student is leaving. If a school is owed an additional payment, the payment must be approved by the parent or guardian. If the school has been overpaid, Step Up For Students will invoice the school for the overpayment.

### **Ten-Day Rule: Student Transfers and Payment Distribution**

If a student transfers to a different participating school in the same quarter, the first school the student attended for ten (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.

The school should withdraw the student in EMA within five (5) business days of their last day at the school.



## Annual Assessment Requirements

Students in grades 3-10 attending an eligible private school using FTC or FES-EO scholarship funds are required to take a standardized assessment approved by the Florida Department of Education.

Students with disabilities for whom standardized testing is not appropriate are exempt from this requirement.

A participating private school must report a student's scores to the parent or guardian and annually report the scores of all participating students to an independent researcher by August 15<sup>th</sup> of the following school year. More information on this requirement is available from the Florida Department of Education [here](#).

A participating private school that chooses to administer statewide standardized assessments must submit a request in writing to the Florida Department of Education by March 1<sup>st</sup> for the subsequent school year.

Students in grades K-12 participating in the PEP scholarship program are required to take a standardized, nationally norm-referenced or statewide assessment approved by the [Florida Department of Education](#) and [submit the results](#) to Step Up For Students annually. An eligible private school or approved home education instructional program provider may not submit test results on behalf of a PEP student. Test results for PEP students must be submitted directly to Step Up For Students by the parent or guardian through EMA.

## Payment Options

Parents and guardians can pay schools and providers directly through EMA or can pay for services out of pocket and submit reimbursement requests.

Parents and guardians may request supporting documentation from providers to support reimbursement requests.

## Direct Payment For Services

As explained above, Step Up For Students allows schools and providers to receive direct payment for some eligible educational services.

Eligible private schools serving students with a private school scholarship (FES-EO students and non-PEP FTC students) must establish tuition and fees and [enroll full-time, in-person scholarship students](#) in EMA.

New providers wishing to participate in direct payment for educational services from scholarship students must [set up a business or personal account in EMA](#) and submit a service catalog.

Parents and guardians cannot request direct payment to a provider until after the service has been rendered.



## Reimbursement Requests

Parents and guardians who choose to pay for eligible tuition and fees to an eligible private school or items or services out of pocket to a provider 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.

## Reimbursement Documentation

Documentation required for reimbursement is dependent on the category in which the service(s) are located. Details regarding the requirements for each service category are available in the [Parent Handbook](#) and [Purchasing Guide](#).

## Reimbursement Timing

Reimbursement requests are year specific. Parents and guardians requesting reimbursements using scholarship funds from the 2025-2026 school year may submit the request any time after the purchase is made, prior to the reimbursement deadline, as long as the items or services were purchased between July 1, 2025, and June 30, 2026.

In addition, reimbursements for purchases made in the following categories between July 1, 2024, and June 30, 2025, are eligible for reimbursement with scholarship funds:

- Eligible Private School Tuition and Fees
- Home Education Instructional Program Tuition and Fees
- Public School Contracted Services
- Full-Time Private Tutoring
- State-Approved Virtual Instruction Provider

In these instances, parents and guardians should submit the reimbursement requests 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 an eligible private school required a tuition payment for the 2025-2026 school year by June 15, 2025, the parent or guardian can apply for reimbursement for that payment any time between July 1, 2025, and June 30, 2026, as long as the proof of purchase is dated July 1, 2024, or later.

For eligible private schools, this policy is not applicable to anything outside of standard tuition and fees (e.g. summer programs, after-school programs, etc.).

This policy is intended to help parents and guardians cover purchases made in advance in preparation for the 2025-2026 school year.



## Advance Reimbursement

Parents and guardians can apply for reimbursement for services up to four months in advance. For example, if a tutor asks for payment in advance, a parent can submit on September 1<sup>st</sup> for reimbursement of tutoring fees paid through the end of December.

Requests submitted for services more than four 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 and 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.

## School Rights & Responsibilities

The requirements for school and provider participation are the same regardless of how a family pays for their services.

Providers, including schools, may not limit, restrict, or attempt to control a parent or guardian's use of student funds for tuition, fees, or other eligible expenses.

## Agreed-Upon Procedures

Private schools must adhere to the established agreed-upon procedures (AUPs) found [here](#) to receive scholarship funds. The AUPs apply uniformly to all private schools and establish that a private school must:

- Be verified as eligible to participate by the Florida Department of Education;
- Have an adequate accounting system, system of financial controls, and process for deposit and classification of scholarship funds; and
- Have properly expended scholarship funds for education-related expenses

Under Florida Statute [1002.421\(1\)\(g\)](#), schools who receive more than \$250,000 in scholarship dollars from the below programs, or in aggregate scholarship dollars from multiple programs for the 2025-26 school year, must contract with a currently licensed Certified Public Accountant (CPA) with a firm licensed to perform attest engagements to conduct a set of AUPs regarding your usage of those funds.

More information about the AUP process can be found [here](#).

## Data Confidentiality

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

Schools and providers may not ask for or require a parent or guardian to provide the username and/or password to their scholarship account. Schools and providers should never access a student's scholarship application or account for any reason.



Doing so may result in loss of provider participation or scholarship eligibility and funding for the student, as well as financial or criminal penalties.

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 and guardians.

## Data Security

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

- Full account password or any part of it
- Banking details
- Full Social Security Number or any part of it

Providers who receive any communication requesting this type of information or have received a suspicious email must 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.

## Maintaining Up-To-Date Contact Information

Schools should keep contact information current, especially their email address. This is the primary way Step Up For Students will communicate important information.

If there is a change of a school or provider's eligibility to participate in scholarship programs, educator or service provider credentials or licenses, physical or mailing address, telephone number, or email address, the information must be updated in EMA and the Florida Department of Education portal when applicable.

## Compliance

### Schools

If there is a change in a school's eligibility to participate in scholarship programs, the Florida Department of Education will notify Step Up For Students. Step Up For Students is not permitted to disburse funds to any school whose approval to participate in scholarship programs has been suspended or revoked.

Multi-Level Marketing corporations with downline representatives will only be onboarded into MyScholarShop at the corporate level. To ensure simplicity, individual representatives or distributors associated with MLMs will not be eligible for onboarding to MyScholarShop. This policy allows us to maintain a streamlined vendor management process while still offering the product line to our students and families.

## Contact Step Up For Students

The Customer Engagement Center is generally open from 8:00 a.m. to 5:00 p.m. EST. During peak periods, hours may be extended. For Customer Engagement Center hours, visit the Contact



Us page on the Step Up For Students website. Providers who have questions or need assistance can contact Step Up For Students by 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.

Providers should be prepared to provide their:

- Name
- Email address associated with the EMA account
- Florida Department of Education school code, if applicable
- Service provider license number, where applicable
- Full business name
- Full business address
- Business tax ID

### **For More Information**

- [Schools and Providers Login and Resources](#)
- [Schools and Providers Marketing Toolkit](#)
- [Parent and Guardian Resources](#)
- [Private School Handbook Feedback Form](#)



## Appendix A—Authorized Uses of Scholarship Funds Chart



# Authorized Use of Scholarship Funds 2025-26

Authorized Use of Funds	Scholarship Program				Payment Method
	FES-UA	FES-EO/FTC	PEP	NWSA	
<b>Instructional materials</b>	X	X	X	X (DP)	DP or R
<b>Curriculum and curriculum materials</b>	X	X	X	X (DP)	DP or R
<b>Tuition and fees for:</b>					
Full-time, in-person private school	X	X			DP or R
Part-time, in-person eligible private school	X		X		DP or R
Hybrid private school			X		DP or R
Home education instructional programs	X		X		DP or R
Eligible postsecondary institution	X	X	X		DP or R
Dual enrollment	X	X	X		DP or R
Approved pre-apprenticeship programs	X	X	X		Reimbursement
Approved online or virtual provider	X	X	X		DP or R
Private-pay Florida Virtual School	X	X	X		DP or R
Approved VPK program provider	X				DP or R
Approved school readiness provider	X				DP or R
<b>Standardized testing fees</b>	X	X	X		DP or R
<b>Contracted services provided by a public school or school district</b>	X	X	X		DP or R
<b>Private tutoring</b>					
Full-time private tutoring	X		X		DP or R
Part-time private tutoring	X	X	X	X (DP)	DP or R
<b>Services provided by a Choice Navigator</b>	X	X	X		DP or R
<b>Contributions to approved college savings programs</b>					
Stanley G. Tate FL Prepaid College Program	X				DP or R
FL 529 Savings Program	X				Direct Pay
<b>Specialized services by approved providers or a Florida hospital</b>					
Applied behavior analysis	X				DP or R
Speech-language pathologist services	X				DP or R
Occupational therapy services	X				DP or R
Physical therapy services	X				DP or R
Listening and spoken language specialist services	X				DP or R
Psychotherapy or counseling by a licensed Psychologist, School Psychologist, Mental Health Counselor, Marriage and Family Therapist, or Clinical Social Worker	X				DP or R
Vision therapy by a licensed Optometrist	X				DP or R
<b>Fees for specialized summer education programs</b>	X				DP or R
<b>Fees for specialized after-school education programs</b>	X				DP or R
<b>Fees for summer education programs that improve reading, literacy, or math skills</b>				X (DP)	Direct Pay
<b>Fees for after-school education programs that improve reading, literacy, or math skills</b>				X (DP)	Direct Pay
<b>Transition services provided by job coaches</b>	X				Reimbursement
<b>Annual home education evaluation fees</b>	X				DP or R
<b>Fees for horse therapy</b>	X				DP or R
<b>Fees for music and art therapy</b>	X				DP or R

"DP" = Direct Pay through EMA or MSS; "R" = Reimbursement. All NWSA purchases must be made by Direct Pay

11/2025

"DP" = Direct Pay through EMA or MSS; "R" = Reimbursement. All NWSA purchases must be made by Direct Pay