



Personalized Education Plan (PEP)

Open House

November 23, 2023



Agenda

Scholarship Updates & Reminders

Reimbursement reminders and refreshers

Using the PEP Handbook

Frequently Asked Questions

Please note: We do not have the Q&A option available; but you can submit questions in the post-webinar survey.





Scholarship Updates & Reminders

Q2 Funding Has Arrived!

PEP families received funding in student ESA accounts:

- **The received amount constitutes 25% of the yearly award.**
- **Scholarship Funds for PEP students will be deposited into the student's scholarship account on or around the following dates for the upcoming quarters:**
 - **Quarter 3: January 15 – February 1**
 - **Quarter 4: April 15 -May 1**
- **PEP families will utilize EMA for MyScholarShop and reimbursements.**

PEP Funding Updates

Florida Tax Credit Scholarship Program Personalized Education Program



Dear Parent/Guardian,

Thank you for your interest in the Personalized Education Program (PEP) Scholarship. **At this time, we have activated a waitlist for the PEP Scholarship to ensure we do not over-award as we approach the 2023-24 scholarship capacity.**

If a scholarship becomes available and your student is found eligible at any time this year, your student's status in EMA will be updated to reflect "FTCPEP" and you will be notified via email. **Please note:** When possible, students are moved from the waitlist in the order they were determined eligible, and award amounts are based on the date of award, not the date of eligibility.

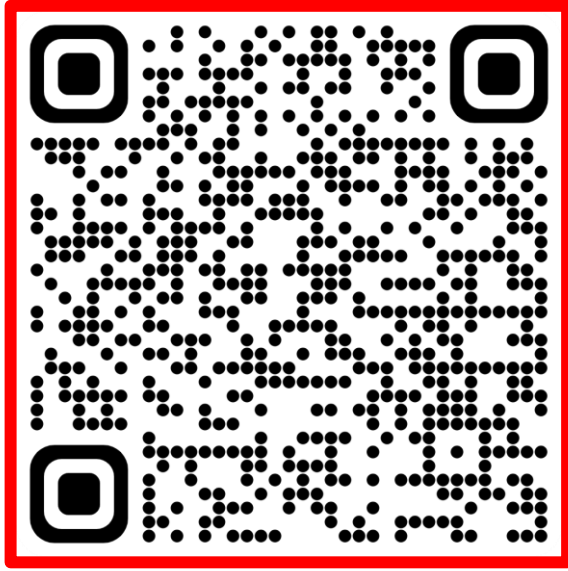
Your student is still awarded the Florida Tax Credit (FTC) Scholarship or Family Empowerment Scholarship for Educational Options (FES-EO), and you can continue to utilize that scholarship if you choose. For more information about how to utilize one of these scholarships, please [click here](#). If you are no longer interested in pursuing the PEP Program, please fill out the PEP Decline Form [here](#).

Subject: PEP Waitlist Notification
Sent: 10.30.23



"At this time, we have activated a waitlist for the PEP Scholarship to ensure we do not over-award as we approach the 2023-24 scholarship capacity."

Funding Information and Resources



PEP Parent Handbook



Purchasing Guide

NEW MyScholarShop **VENDOR ALERT**



MyScholarShop New Vendors



Home Works for Books: Family-run homeschool bookstore owned by a homeschooler with 25 years of experience. Offers various curricula, school supplies, manipulatives, learning supplements, and consults.

Website: <https://homeworksforbooks.com/>



Really Good Stuff: Offers products that are designed and aligned to state and national standards. A team of teachers creates the proprietary assortment in conjunction with industry experts and the educator advisory panel. From fun and engaging learning solutions including social-emotional and curriculum support, to teacher supplies, easels and the bins that keep it all organized, Really Good Stuff has it all.

Website: <https://www.reallygoodstuff.com/>



TUNE into READING: A research-based reading intervention program that uses the rhythm and melody of song to engage students in a fun singing game. Songs lessons have been specifically designed and leveled for reading difficulty, strategic vocabulary, and comprehension. Students are assigned a Song Folder that includes 20 song lessons.

Website: <https://tuneintoreading.com/>

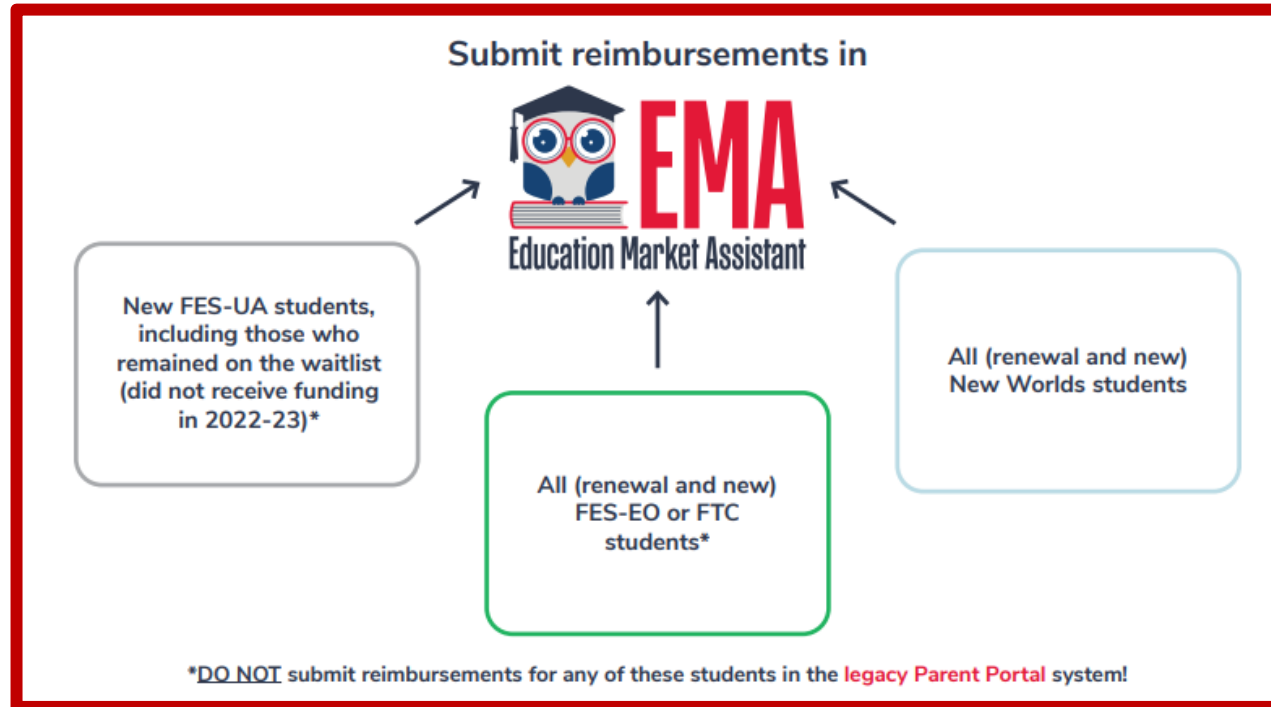




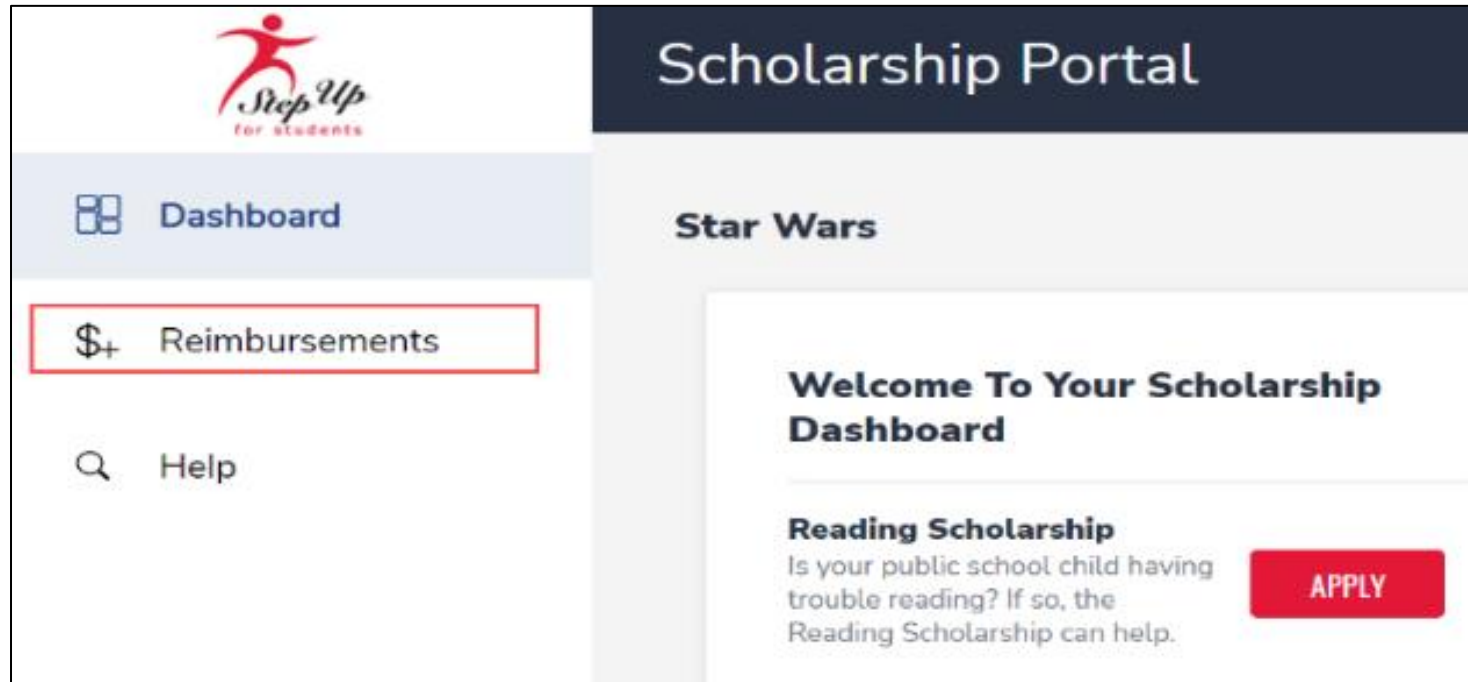
Revisiting Reimbursements

HELP! Where Do I Submit my Reimbursements?

Personalized Education Program Scholarship Recipients



Reimbursements in EMA



Once you are signed into EMA, click Reimbursements on the left panel of the Dashboard.

Reimbursements in EMA

Reimbursements

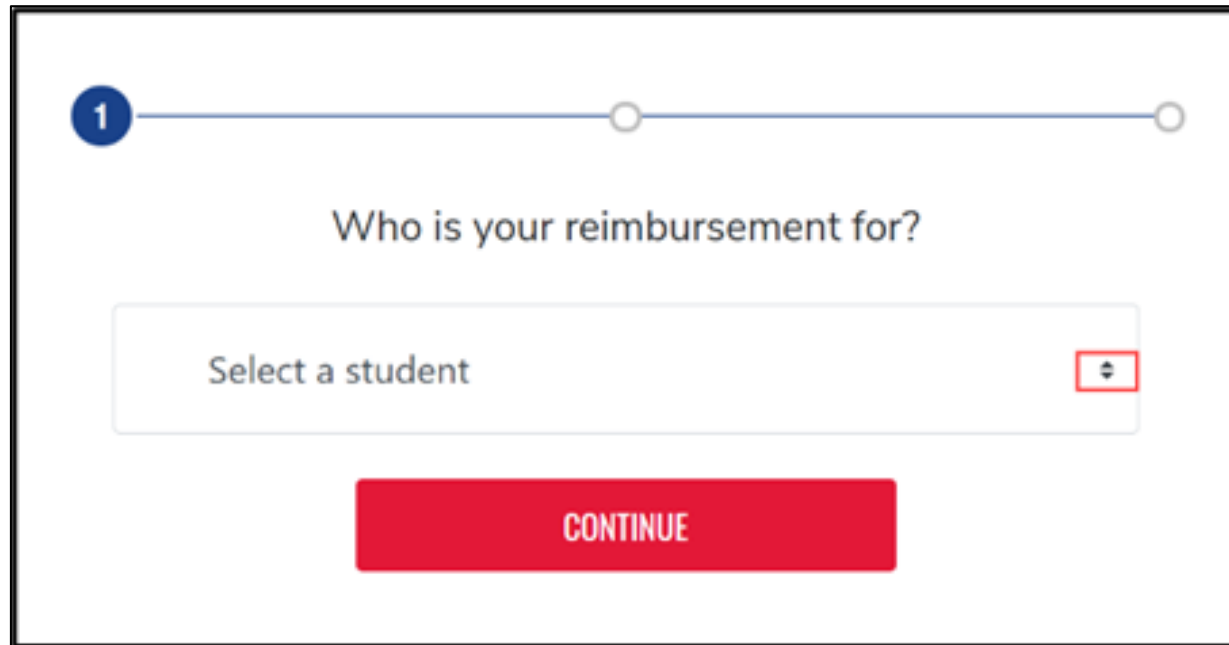
[+ NEW](#)

REIMBURSEM	PROGRAM	DATE	PROVIDER	STUDENT	AMOUNT	STATUS	VIEW	RECEIPTS
No records to display.								

From 1 to 0 of 0

From the Reimbursements screen, select NEW

Reimbursements in EMA



1

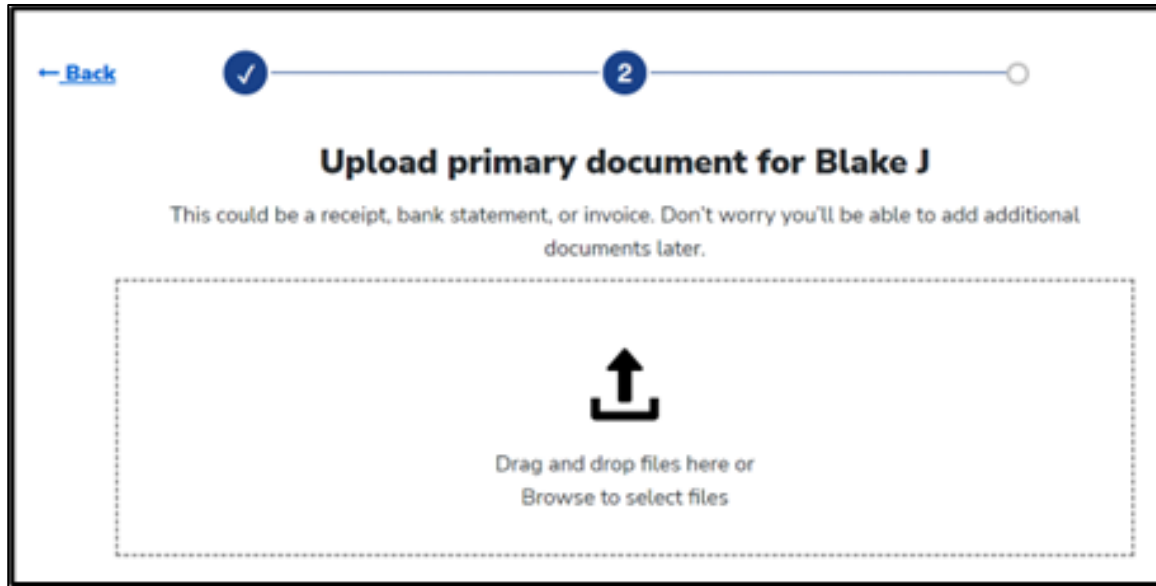
Who is your reimbursement for?

Select a student


CONTINUE

From the dropdown menu, select a student, and then select **CONTINUE**.

Reimbursements in EMA



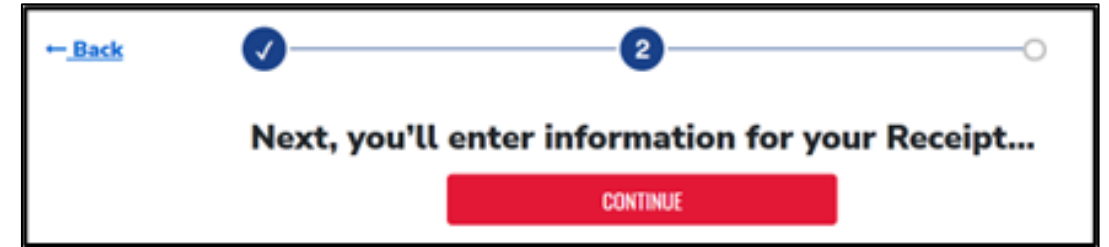
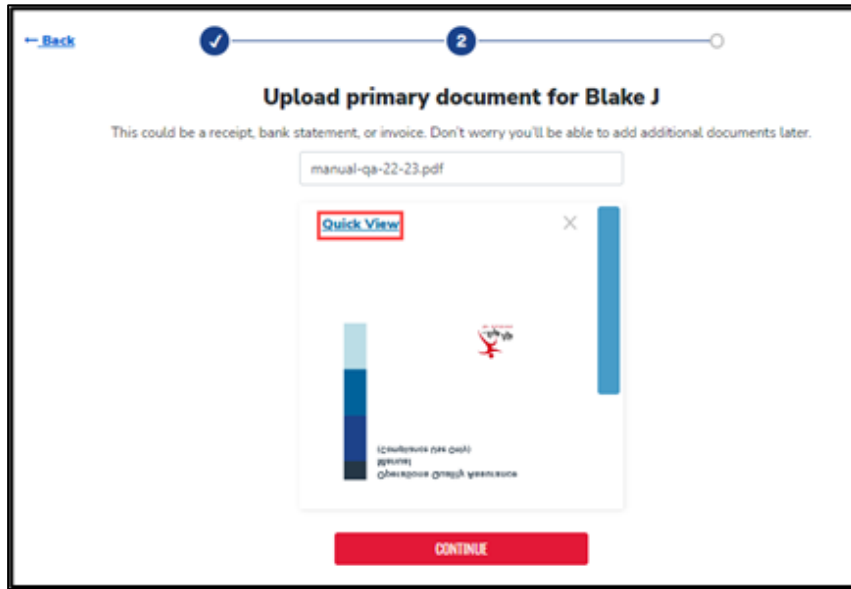
The screenshot shows a web interface for uploading a document. At the top left is a "[← Back](#)" link. A progress bar at the top has three steps: the first is a checked circle, the second is a circle with the number "2", and the third is an empty circle. The main heading is "Upload primary document for Blake J". Below this is a sub-heading: "This could be a receipt, bank statement, or invoice. Don't worry you'll be able to add additional documents later." A large dashed rectangular box contains a central upload icon (an upward arrow inside a square) and the text "Drag and drop files here or Browse to select files".

Drag-and-drop a file onto the  icon to upload the primary document or receipt for the student selected.

Note:

- You will be able to upload additional documents later in the process.
- The file must be a PNG, JPG, jpeg, or PDF.

Reimbursements in EMA



Select **CONTINUE** again.

Select **Quick View** to review the document or receipt, as necessary, and then select **CONTINUE**.

Reimbursements in EMA

Complete the **required fields** for each item. To add another item to the reimbursement request select **ADD ITEM**. When all items are added and fields are complete, select **DONE**.

Note:

- Select **Download** to review the primary document or receipt uploaded to the reimbursement.
- Select **Back** to go back and make any edits necessary.

The screenshot shows a web interface for entering receipt information. At the top, there is a progress bar with three steps: a back arrow, a checkmark, and a '3' in a circle. Below the progress bar, the title is 'Enter information for each line of your Receipt'. A sub-header reads: 'Want to get reimbursed faster? We recommend providing as much information as you can to get your money back faster.' Below this is a text input field containing 'gardiner-parent-handbook-2.pdf' and a 'Download' button with a document icon. The main form area is titled 'ITEM 1' and contains several input fields: 'Purchase Date' with a date picker showing 'mm/dd/yyyy', 'Invoice #' with an empty text box, 'Category' with a dropdown menu, 'Amount' with a text box containing '\$0.00' and a currency symbol, and 'Educational Benefit' with an empty text box. At the bottom of the form are two buttons: a blue 'ADD ITEM' button and a red 'DONE' button.

Reimbursements in EMA

Review your purchases for [blurred]

Tablet-Boogieboard LCD	\$ [blurred]
TOTAL	\$ [blurred]

SUBMIT FOR APPROVAL

The review screen displays. Select **SUBMIT FOR APPROVAL** to complete the reimbursement request.

Reimbursements in EMA

▼	30 [REDACTED] ES-UA	09/19/2023	Barnes & Noble	N [REDACTED]	\$27.50	Submitted	Details	View
ID	CATEGORY	TYPE	DESCRIPTION	AMOUNT	STATUS			
30 [REDACTED]	Instructional Material	Books	Print	\$27.50	Submitted			

To check the status of a submitted reimbursement, simply click **REIMBURSEMENTS** again and you will be able to see that status of each reimbursement you have submitted.

Educational Benefit Form: What is it?



Educational Benefit Form

Student Name: _____

Student ID: _____

Reimbursement Type (example: PE equipment, field trip, etc.): _____

Item for which Reimbursement is Requested (the item you purchased or plan to purchase): _____

Learning subject area(s) (for example: math, reading, physical education, social development): _____


Supporting curriculum or course description (curriculum or course with which the item requested will be used; curriculum may either be purchased or parent-designed. **Note:** This section required for Cooking, Gardening, Mechanical, and Woodworking Equipment and Supplies): _____

How will this item help my student learn? (Describe **in as much detail as you can** how this purchase will benefit your student's education): _____

REMINDER

The Educational Benefit Form (EBF) helps you better define the educational benefit of a purchase and **MUST** be submitted for reimbursement requests in the **Elective** or **Field Trips** categories.

Educational Benefit Form: What's its purpose?

- The EBF was added for the Electives and Field Trip categories as these two categories have substantially grown based on parent/guardian feedback. This form allows us to collect more detailed information about the educational benefit of some of the more innovative uses of the ESAs.
 - Parents/guardians are welcome to use it for reimbursements in other categories as well, but it will help our teams make more informed decisions, ultimately allowing faster responses as well as fewer reimbursements being placed on hold.
- 

Educational Benefit Form

- This form must be used by new families in EMA .
- Elective and Field Trip reimbursements that do not include the EBF will be put on hold until the form is submitted.
- If a reimbursement is miscategorized and should have been in the electives or field trip category, then the reimbursement will be re-categorized and put on hold if the EBF was not submitted.
- If a parent/guardian seeks reimbursement for something like Legos or blocks or other items that already have their own defined category to go under curriculum, then the parent/guardian needs to give the curriculum demonstrating that it's required. The definition of curriculum includes required supplemental materials, so please demonstrate this at the time of submission.

PEP Parent/Guardian Handbook



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

PEP Parent/Guardian Handbook



The PEP parent handbook serves as a guide on how to utilize your scholarship funds.

Over the next few slides, we will show you where to find answers to some of the most frequently asked questions we get about the PEP scholarship.

Approved Usage of Funds

Tuition and Fees

- Eligible Private School
- Home Education Instructional Program (for PEP Students Only)
- Eligible Postsecondary Institution
- Approved Pre-apprenticeship Program
- Fees for Part-time Tutoring or Choice Navigator Services
- Full-time Private Tutoring Program (for PEP Students Only)
- Approved Online or Virtual Providers
- Private-Pay Student for Florida Virtual School
- Instructional Materials such as digital materials, stand-alone online classes, internet resources, physical education, books, musical instruments & equipment, electives, field trips, at home classroom furnishings, school supplies, learning manipulative/creative play items, educational subscription kit, educational software/subscriptions,
- Curriculum
- Standardized Testing Fees
- Contracted Services Provided by a Public School or School District

Full-time Tutoring (for PEP students only)

Full-Time Tutoring (For PEP Students Only)

Invoice or receipt on business letterhead that includes the following:

- The scholarship student's first and last name
- The tutor's first and last name
- The tutor's DOE certification number
- The company name, if applicable
- The type of service rendered
- Dates and hours of instruction, including year
- The tutor's hourly rate
- Proof of payment if the payee is the parent/guardian (refer to Proof of Payment section above)

Providers who have not previously received payment via scholarship funds will be required to provide a Step Up For Student Full-Time Tutoring Agreement and W9.

Tuition & Fees for Home Education Instructional Programs for PEP Recipients

Tuition and Fees for Home Education Instructional Programs for Personalized Education Program (PEP) Students

- A “Personalized Education Program” means the sequentially progressive instruction of a student directed by his or her parent in order to satisfy the attendance requirements of ss. 1003.01(13), and 1003.21(1) while registered with an eligible nonprofit scholarship funding-organization pursuant to s. 1002.395.
- FTC-PEP scholarship funds may be used to pay tuition and fees for programs, courses, or classes offered to PEP students. These services must be part of the student’s sequential instruction per the definition of a PEP student.
- “Parent” is either or both parents of a student, any guardian of a student, any person in a parental relationship to a student, or any person exercising supervisory authority over a student in place of the parent (s. 1000.21(5)).

The following considerations apply when determining whether a program is an eligible home education instructional program tuition and fee expense.

Eligible programs must:

- Be a program selected by the parent as a part of their PEP student’s parent-directed instruction. (Programs may not be full-time or full-time equivalent). Private schools, virtual schools, and public or charter schools are not considered home education program.
- Provide courses and/or activities for PEP students that enhance or enrich the child’s learning opportunities.
- *For a comprehensive list, please see the Purchasing Guide on page 10*

Proof of Payment

Proof of payment is required for any reimbursement request where the payee is the parent/guardian.

Proof of payment can be any of the below:

- Credit card receipt with the full transaction date (mm/dd/yy), payee name, and amount
- Credit card/bank statement including the full transaction date (mm/dd/yy), payee name, and amount
- PayPal receipt including the full purchase date (mm/dd/yy), payee name, amount, and funding source
- Copy of the front and back of the cleared check including the full payment date (mm/dd/yy), payee name, and amount
- FACTS statement including the school's name, student's first and last name, description of each payment to be reimbursed (i.e., tuition, registration, etc.), full payment dates (mm/dd/yy), and amounts
 - This information can be found on the FACTS mobile website under Payment Plan & Billing - Transactions.
 - Include the individual payment details specific to the student and current reimbursement request.

Proof of Payment Cont.

- Cash payments to a provider require a signed, dated letter from the provider on their letterhead including the provider's name, student's first and last name, description service (i.e., tuition, registration, etc.), full payment dates (mm/dd/yy), amounts, and payment method (i.e., cash)
- Requests for reimbursement of cash purchases from private sellers, not affiliated with a company, (i.e., garage sale, Craigslist, private tutors, private therapists, etc.) **will be denied.**
- When making purchases from private sellers, payment in the form of a personal or cashier's check, money order, PayPal, Venmo or other electronic payment method is **REQUIRED**. This form of payment provides verification of the purchase, which is required for reimbursement.

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

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



Q&A

Q. You Had Questions?

A. We've Got Answers!



It's Q & A Time!

Once we do the end-of-the-year testing, to whom are we submitting the scores?

Those results will be provided to Step Up For Students prior to scholarship renewal for the 2024-25 school year, and each year annually so long as the student remains a PEP student.

Can they make this presentation in Spanish for families that cannot understand all the words in English?

We have enabled the Zoom translated captions function to allow for the webinar to automatically translate in real-time to captions as well as several other languages. Here is the link for instructions on how to use the function as a webinar participant: [Viewing caption in another language](#)

If my current PEP student is taken off the waitlist for the Unique Abilities scholarship mid-year, what is the process for switching over?

You will be emailed requesting that you accept the UA scholarship and decline the PEP scholarship via the Scholarship Decline Form.

If I purchased my homeschool curriculum in July 2023 and only got the funds in October 2023, can I get reimbursed?

Yes, eligible purchases made any time after July 1, 2023, may be submitted for reimbursement, even if you were funded at a later date.

It's Q & A Time!

MSS denial reason for orders created over 2 weeks ago:

Unfortunately, this order is being denied because the order was created/started more than 2 weeks ago and the items may no longer be available. Please submit a new order for review and approval.

Could you please clarify what caused the denial?

There are a few reasons: items in the cart could be out of stock, pricing could have changed, and the address on the order will not change if the parent updated it in EMA/SAS after the order was created. A denial for being over 2 weeks old does not mean they are not eligible for the items or cannot reorder. It's a safeguard to ensure we're not sending items to the wrong place or sending a bunch of orders to our vendors that will be canceled.

Parents can follow the below steps to copy their order and resubmit it. This will update the "date created" to today's date (or whichever date they copy the order).

Here are the steps:

- Enter MyScholarShop
- Go to Your Requests
- Find the denied order
- Click "Buy Again"
- Submit the new order

Missed A Previous PEP Open House?



September Open House

- Legislative Updates
- Scholarship Overview
- Funding Information
- MyScholarShop
- Purchasing Guide – instructional materials and specialized services
- Reimbursements in EMA



October Open House

- Scholarship Updates & Reminders
- Finding a provider in EMA
- Using MyScholarShop in EMA
- Resources

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3 videos

Step Up Parent

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Three new exciting YouTube Videos!



Navigating
MyScholarShop in EMA



Finding Providers &
Services in the EMA
Marketplace for Parents



What a provider sees
when invoicing and billing

Contact Us



Call: 877-735-7837



Email: PEP@sufs.org



Chat: www.stepupforstudents.org

Monday – Friday 8:00 AM – 5:00 PM ET





Help Us Serve You Better...

**PLEASE COMPLETE
OUR SURVEY!**

**Thank you
for attending
our webinar**

**Upcoming Webinar
December (Pre-recorded)**



See you next time!

A Thanksgiving greeting card featuring a central text box with a dark green background and a gold border. The text inside the box reads "HAPPY - THANKSGIVING - DAY" in a serif font. The box is surrounded by a decorative border of autumn leaves in shades of orange, yellow, and brown, with clusters of red berries on thin stems.

— HAPPY —
- THANKSGIVING -
— DAY —