



PEP OPEN HOUSE

PERSONALIZED EDUCATION PROGRAM

Personalized Education Plan (PEP) Open House

January 25th, 2024



Agenda

Scholarship Updates & Reminders

Funding Updates

MyScholarShop: New Vendor Alert

Parent/Guardian Handbooks

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



Happy
New year
2024

May 2024 be your best year for you



Scholarship Updates

Scholarships for Florida Schoolchildren



Dear Parent/Guardian,

In preparation for the 2024-25 school year, we wanted to give you advanced notice that applications for the following programs will be available in the **spring**:

- Family Empowerment Scholarship for Students with Unique Abilities (FES-UA)
- Family Empowerment Scholarship for Educational Options (FES-EO) and the Florida Tax Credit Scholarship (FTC) (including PEP and Transportation).

Reminder: After completing a renewal application for a student who is currently using an FTC/FES-EO or FES-UA scholarship, the student may be automatically awarded a scholarship for the 2024-25 school year.

Step Up For Students will send you more information about the application process next month.

Questions?

Chat with a live agent at www.sufs.org.

**Subject: Looking ahead: 2024-2025
Scholarship Application Update
Sent: 1.20.24**

**Florida Tax Credit Scholarship Program &
Family Empowerment Scholarship for Educational Options**



Dear Parent/Guardian,

Florida state law now requires Scholarship Funding Organizations (SFOs), including Step Up For Students, to collaborate to prepare agreed-upon purchasing guidelines for authorized uses of scholarship funds by December 31, 2023, and to update the guidelines at least annually.

The Agreed-Upon Purchasing Guidelines, found [here](#), contain general guidelines.

As a Step Up family, we encourage you to also review the following resources as they contain more detail on policies and procedures related to scholarship spending through Step Up:

- [Step Up's FTC/FES-EO Purchasing Guide*](#)
- [FTC/FES-EO/PEP Handbook*](#)

**Please note: You will notice some changes in the agreed-upon purchasing guidelines, for example, the new inclusion of maintenance for musical instruments as an eligible expense. Additionally, all caps are being eliminated.*

**Subject: Purchasing Guidelines for
FTC/FES-EO and PEP programs
Sent: 12.31.23**







FTC/FES-EO Purchasing Guide

NEW
MyScholarShop
VENDORS



MyScholarShop New Vendors



 The Piper logo consists of five colored squares: red with 'P', yellow with 'I', green with 'P', blue with 'E', and red with 'R'.	<p>Piper was created in 2014 with a simple vision: to create experiences around learning with technology that are hands-on, effective, and fun. Piper is committed to providing quality STEAM educational opportunities to students around the globe.</p>	<p>https://www.playpiper.com/</p>
 The Luminous Minds logo features a stylized purple smiley face icon followed by the text "LuminousMinds" in a purple sans-serif font.	<p>Luminous Minds offers premium reading comprehension Phonics & Sight Word worksheets for parents and teachers, making early learning accessible for all.</p>	<p>https://www.luminousmindsinc.com/</p>
 The Leaf'd Box logo features a green leaf icon with a plant growing from it, with "ESTD. 2020" on either side. Below the icon is the text "LEAF'D BOX™" and "GARDENING REIMAGINED" in a smaller font.	<p>Pick your garden, grow your plan and enjoy your harvest. Their gardens come delivered with 30 plants and with the experience of your choosing. They offer two different experiences, Basic & Advanced.</p>	<p>https://leafdbox.com/</p>
 The Exploration Education logo features a blue circular icon with the letters "EE" inside, followed by the text "EXPLORATION EDUCATION" in a bold, blue, sans-serif font.	<p>Exploration Education focuses on project-based learning that makes it enjoyable for students to learn and easy for the parent or teacher to implement.</p>	<p>https://explorationeducation.com/</p>

Florida Tax Credit Scholarship Program &
Family Empowerment Scholarship for Educational Options



*This message does not apply to FES-UA renewal students at this time.**

Dear Parent/Guardian,

We are pleased to announce that Step Up For Students families may NOW choose how they would like to be reimbursed.

Families may choose from these three options:

- **Direct Bank Transfer:** Securely deposit funds directly into your bank account via an ACH transfer.
- **Check:** Have a physical check mailed to your provided address.
- **PayPal:** Opt for PayPal, a widely used and trusted online payment platform.

Important details:

- *Until further notice, FES-UA renewal students will continue to use the legacy system.
- For all other ESA students**, a payment method must be selected to continue submitting reimbursement requests. If your family is only using your student's scholarship for tuition and fees paid directly to an eligible

Subject: AVAILABLE NOW: More ways to be reimbursed!

Sent: 1.9.24



More Ways to Receive Reimbursements

Choose How to Receive Payment for Approved
Reimbursements

Important Notice

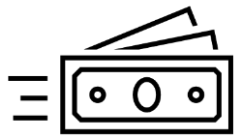
We are pleased to announce improvements to our reimbursement services for Step Up's ESA scholarship families. This new process can be managed within the family's EMA account and will replace the U.S. Bank Focus Cards.

Families submitting reimbursement requests in EMA must select a payment method before submitting a new request. *Note: This step should only be completed if you intend to submit reimbursement requests.*

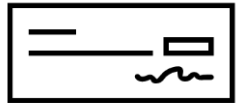
Renewal FES-UA students are not impacted at this time and will continue to use the legacy system until further notice.

Payment Method Options

Families with an approved reimbursement request can now select from one of the following payment methods:



Direct Bank Transfer: Securely deposit funds directly into your bank account via an ACH transfer.

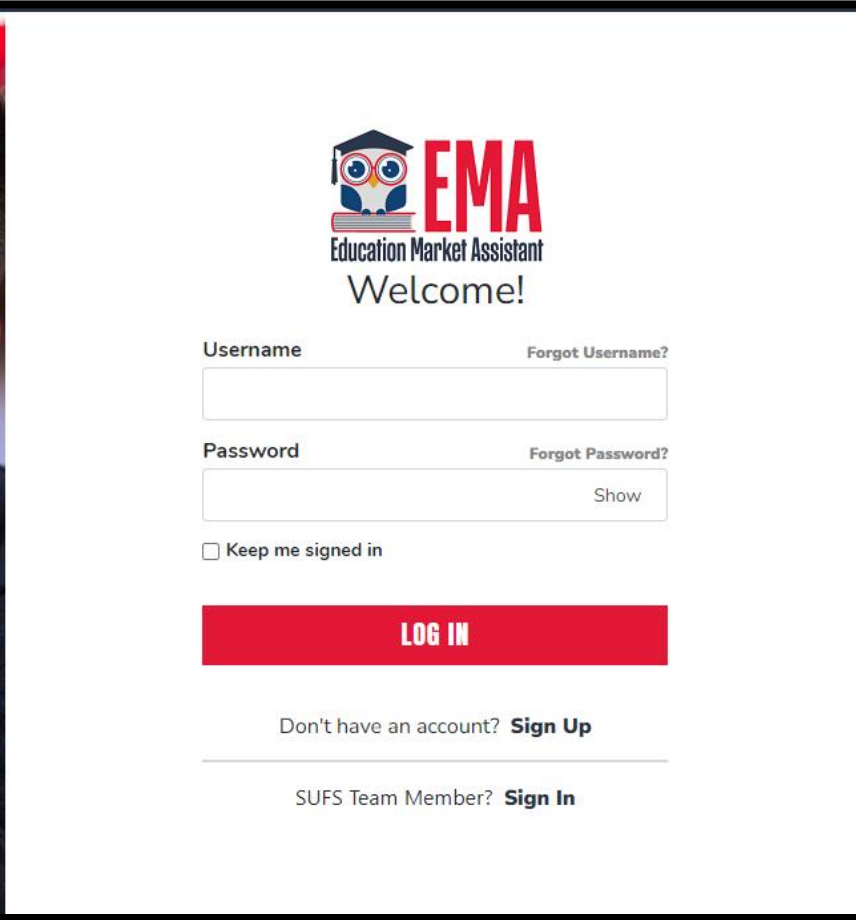


Check: For a more traditional approach, you can select a physical check for your reimbursement payment method. The check will be mailed to your provided address.



PayPal: Opt for PayPal, a widely used and trusted online payment platform, to receive your reimbursement with ease.

Setting Up Your Payment Profile



The image shows a login page for the Education Market Assistant (EMA) system. At the top center is the EMA logo, which features a stylized owl wearing a graduation cap, with the letters 'EMA' in large red font to its right. Below the logo, the text 'Education Market Assistant' and 'Welcome!' are displayed. The login form consists of two input fields: 'Username' and 'Password'. The 'Username' field has a 'Forgot Username?' link to its right. The 'Password' field has a 'Forgot Password?' link to its right and a 'Show' button to its left. Below the password field is a checkbox labeled 'Keep me signed in'. A prominent red button with the text 'LOG IN' in white is centered below the form. At the bottom of the page, there are two links: 'Don't have an account? Sign Up' and 'SUFS Team Member? Sign In'.

EMA
Education Market Assistant
Welcome!

Username [Forgot Username?](#)

Password [Forgot Password?](#) Show

Keep me signed in

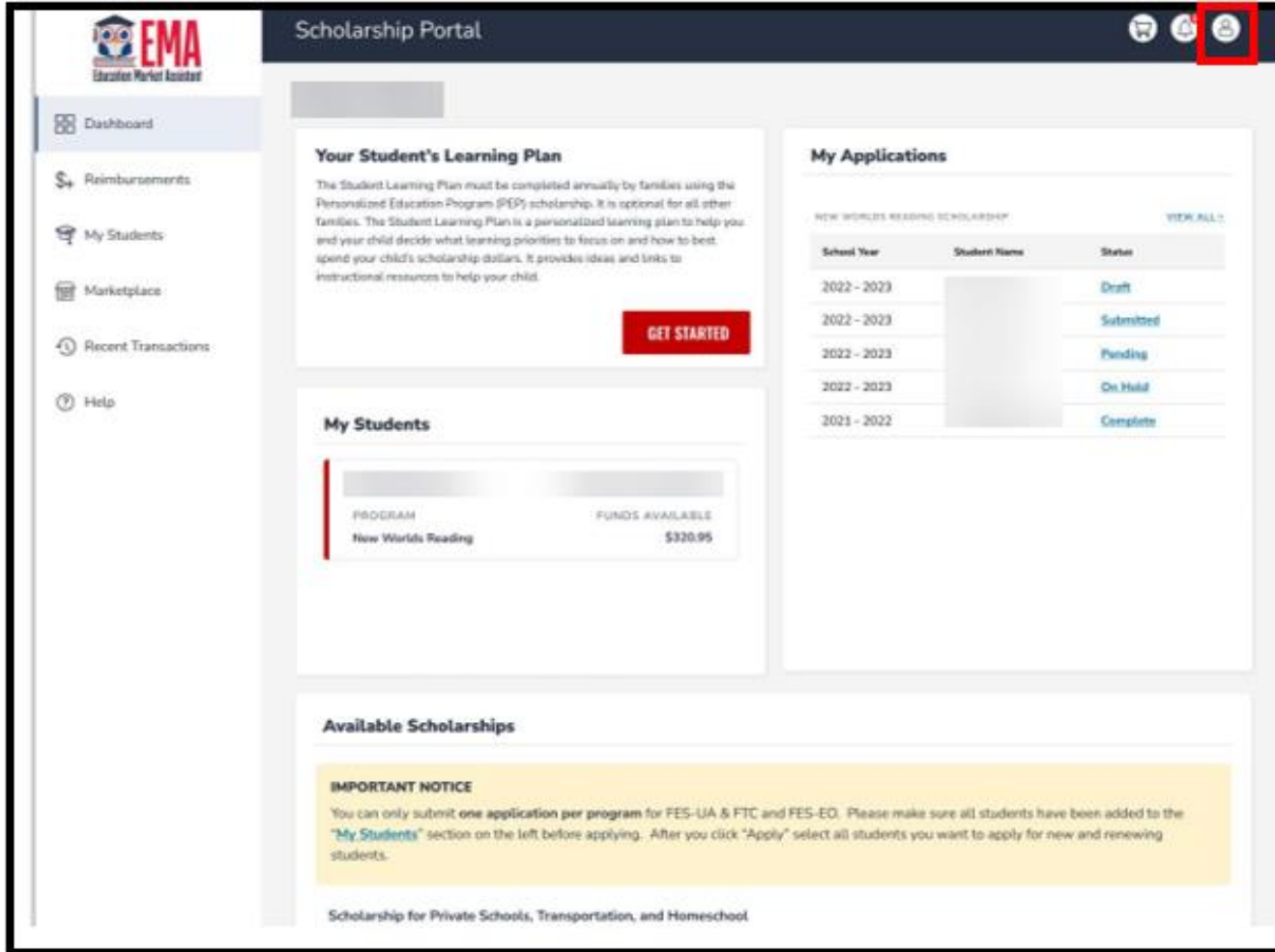
LOG IN

Don't have an account? [Sign Up](#)

SUFS Team Member? [Sign In](#)

Log in to your EMA account.

Setting Up Your Payment Profile



The screenshot shows the Scholarship Portal dashboard. The top right corner features three icons: a shopping cart, a lock, and a person icon. The person icon is highlighted with a red box. The dashboard includes sections for 'Your Student's Learning Plan', 'My Applications', 'My Students', and 'Available Scholarships'. The 'My Applications' section contains a table with the following data:

School Year	Student Name	Status
2022 - 2023		Draft
2022 - 2023		Submitted
2022 - 2023		Pending
2022 - 2023		On Hold
2021 - 2022		Complete

The 'My Students' section shows a table with the following data:

PROGRAM	FUNDS AVAILABLE
New Worlds Reading	\$320.95

The 'Available Scholarships' section includes an 'IMPORTANT NOTICE' box with the following text: 'You can only submit one application per program for FES-UA & FTC and FES-EO. Please make sure all students have been added to the "My Students" section on the left before applying. After you click "Apply" select all students you want to apply for new and renewing students.'

Click on the person icon on the top right corner of the dashboard and then click **“Edit Profile.”**

Setting Up Your Payment Profile

Scroll down to the **“Payment Method”** section on your profile and click the **“Manage”** button. This information must be kept up to date and can be updated at any time, however, the address should not be altered and must match the information in your guardian profile.

Payment Method

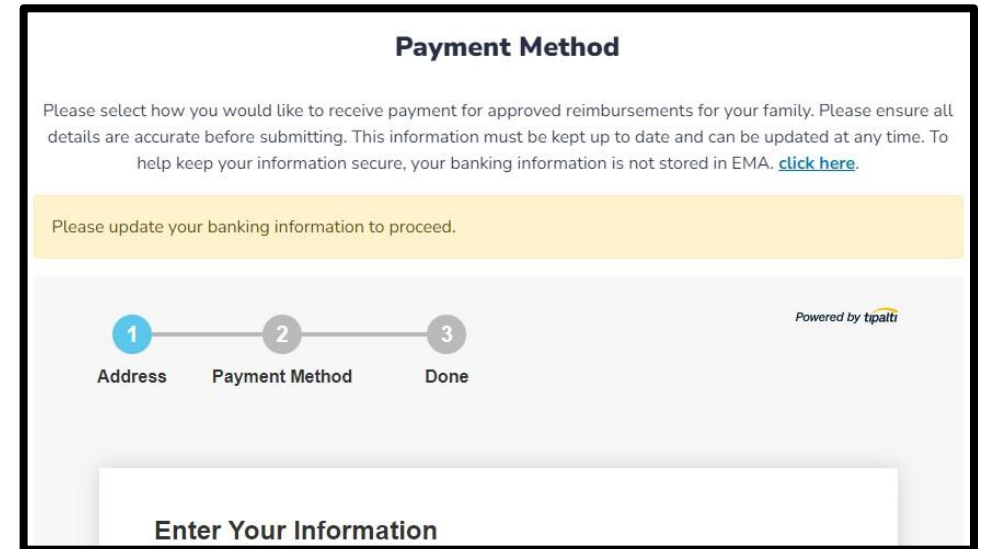
Families submitting reimbursement requests for students with available funds must select how they would like to receive payment and provide any applicable information. This is done by clicking the “Manage” button below. This information must be kept up to date and can be updated at any time. **Note:** The “Manage” button becomes available once you have at least one funded student. This step should only be completed if you intend to submit reimbursement requests.

[MANAGE](#) ⚠ Payment Method Needs Attention

Note: The “Manage” button becomes available after the profile is saved for the first time.

Setting Up Your Payment Profile

- Once you click “**Manage**,” you’ll be brought to the payment method screen.
- Your address information will be pre-populated from your EMA profile.
 - **DO NOT EDIT YOUR ADDRESS HERE.**
 - If you need to change your address, please do so in your EMA parent profile then return to the Payment Method screen.
- Click “**Next**” to continue to select a payment method.



The screenshot shows a web form titled "Payment Method". At the top, it asks the user to select how they want to receive payment for approved reimbursements and to ensure all details are accurate. A yellow banner below this text says "Please update your banking information to proceed." Below the banner is a progress indicator with three steps: "1 Address", "2 Payment Method", and "3 Done". The "Payment Method" step is currently active. In the bottom right corner, it says "Powered by tpatr". At the bottom of the form, there is a large white input field with the text "Enter Your Information" below it.

Setting Up Your Payment Profile

Payment Method

Please select how you would like to receive payment for approved reimbursements for your family. Please ensure all details are accurate before submitting. This information must be kept up to date and can be updated at any time. To help keep your information secure, your banking information is not stored in EMA. [click here](#).

1 Address 2 **Payment Method** 3 Done

Powered by tipalti

Payment Method: Direct Deposit / ACH

Name on Account: test twohundred

Bank Name: Required field

Routing Code: Required field

Account Number: Required field

Account Type: Checking Savings

Next, select how you would like to receive payment for approved reimbursements. You can choose from: **Direct Bank Transfer, Check or PayPal.**

The fields will vary based on the **Payment Method** selection.

Please ensure all details are accurate before submitting.

Please note: To help keep your information secure, your banking information is not stored in EMA.

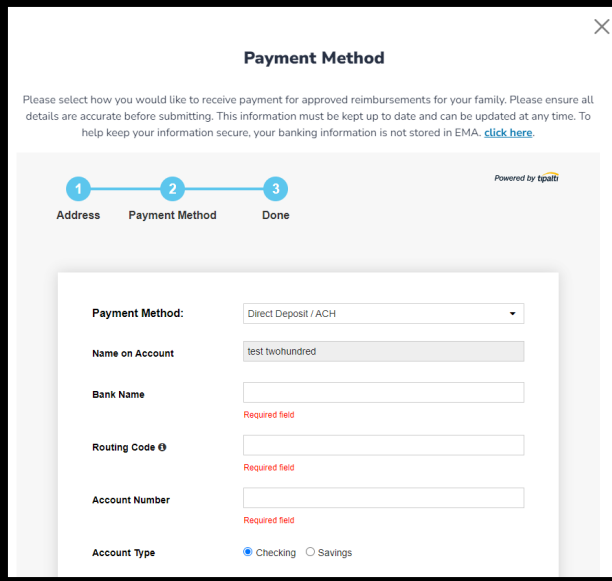
Setting Up Your Payment Profile

Payment Options

Direct Deposit: Once a reimbursement request is approved, Step Up will initiate the transfer of funds which will be electronically transferred into the families' bank account two business days later. This option requires a bank account and is convenient for families who prefer an automated process.

Mailed Check: A check will be mailed roughly one week after the reimbursement request is approved by Step Up. This option may be preferred by those who are more comfortable with traditional transactions and/or families who do not have a bank account.

PayPal: Transactions often occur in real-time or within a few hours. However, it may take additional time to transfer funds from a PayPal account to a bank account or a credit/debit card. PayPal is also widely accepted on various websites, and it allows for quick peer-to-peer transfers.



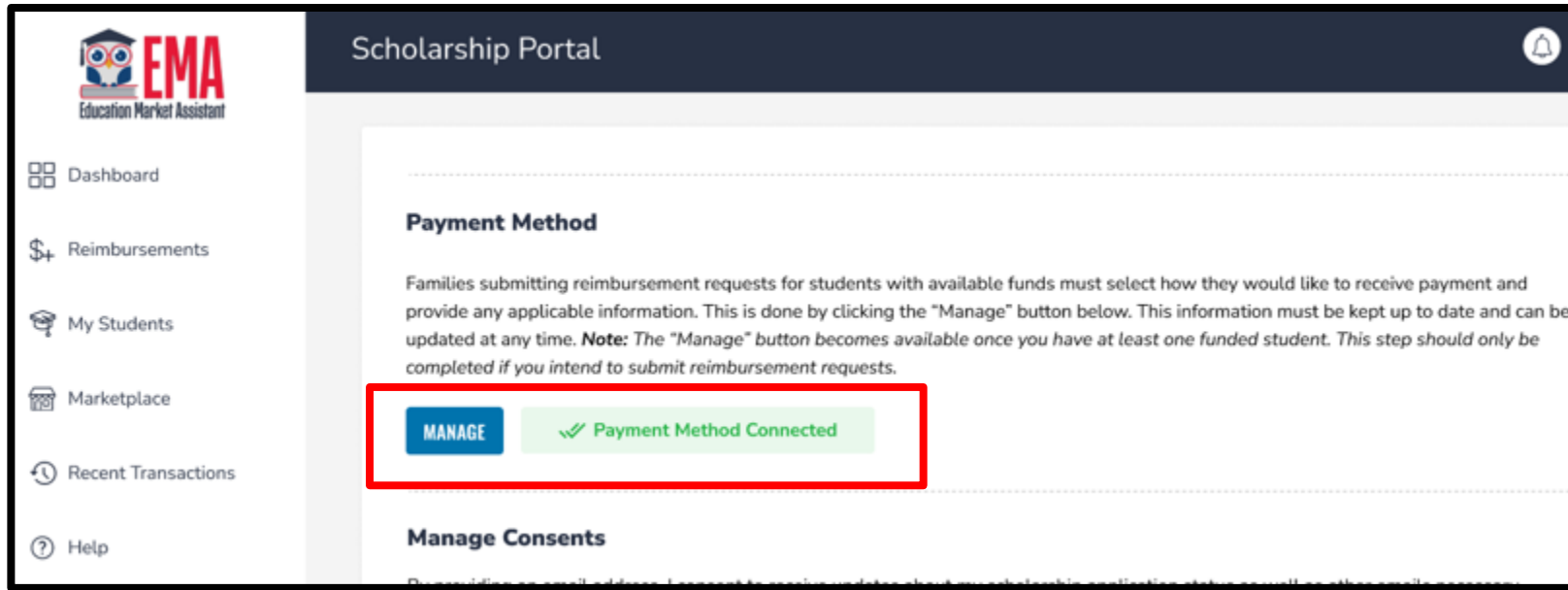
The screenshot shows a web form titled "Payment Method" with a close button (X) in the top right corner. Below the title is a disclaimer: "Please select how you would like to receive payment for approved reimbursements for your family. Please ensure all details are accurate before submitting. This information must be kept up to date and can be updated at any time. To help keep your information secure, your banking information is not stored in EMA. [click here](#)".

A progress indicator at the top shows three steps: 1. Address, 2. Payment Method (current step), and 3. Done. A "Powered by tpasti" logo is in the top right of the form area.

The form fields are:

- Payment Method:** A dropdown menu with "Direct Deposit / ACH" selected.
- Name on Account:** A text field containing "test twohundred".
- Bank Name:** A text field with a red "Required field" label below it.
- Routing Code @:** A text field with a red "Required field" label below it.
- Account Number:** A text field with a red "Required field" label below it.
- Account Type:** Radio buttons for "Checking" (selected) and "Savings".

Setting Up Your Payment Profile




When the green message
“Payment Method
Connected” displays,
you are good to go!

Please note: It may take up to 12 hours for this change to be reflected in your EMA account. If you continue to see the "Payment Method Needs Attention" message after updating your payment method, please log out, open a new window and log back in.

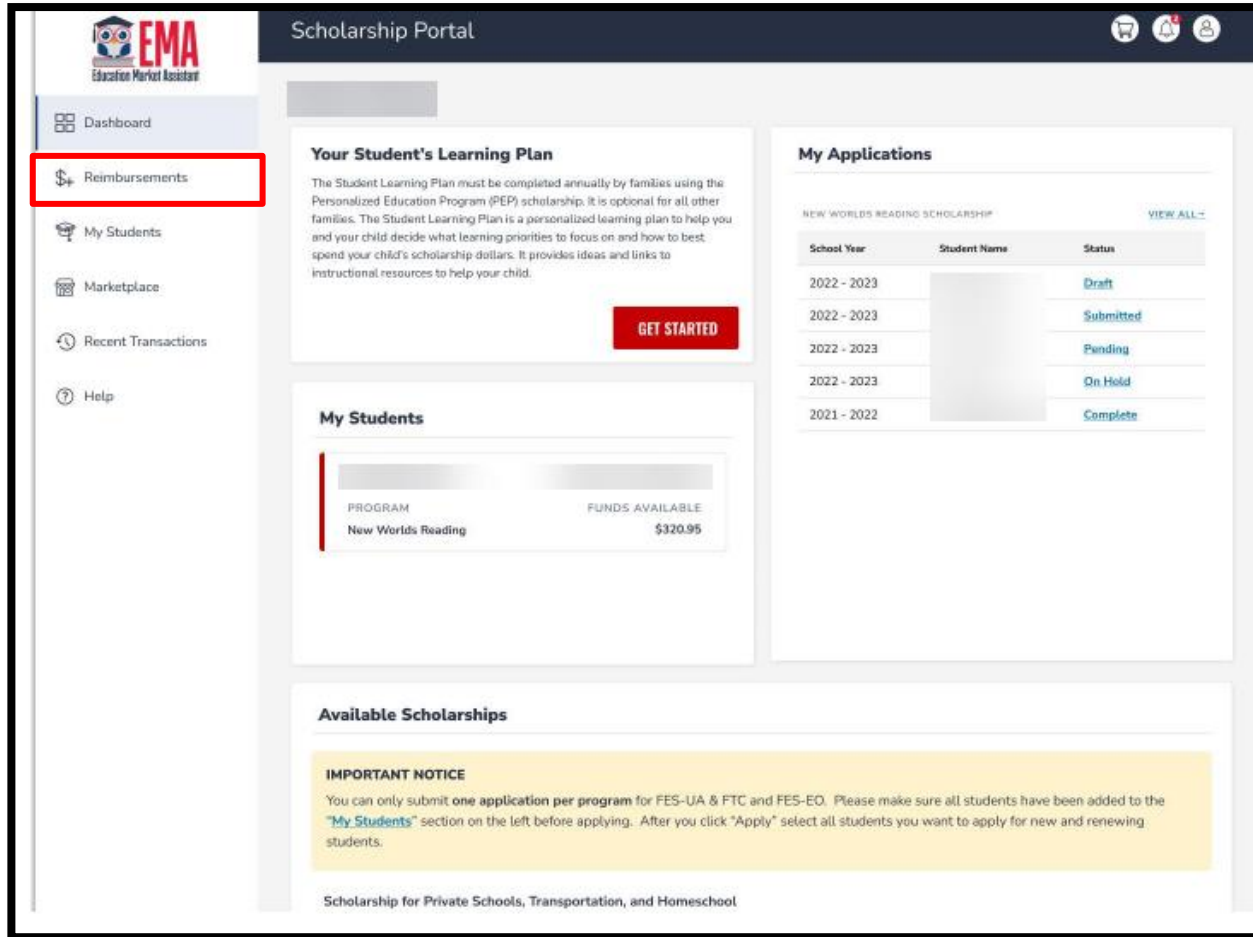
Not Ready to Update Right Now?

To continue submitting reimbursement requests within EMA, you will need to select a payment method.

If you do not update this information in your profile today, you will be reminded on various screens in EMA before you can submit a reimbursement.



Setting Up Your Payment Profile



The screenshot shows the Scholarship Portal interface. The left sidebar contains navigation tabs: Dashboard, Reimbursements (highlighted with a red box), My Students, Marketplace, Recent Transactions, and Help. The main content area is titled 'Scholarship Portal' and includes sections for 'Your Student's Learning Plan', 'My Applications', 'My Students', and 'Available Scholarships'. The 'My Applications' section displays a table for 'NEW WORLDS READING SCHOLARSHIP' with columns for School Year, Student Name, and Status.

School Year	Student Name	Status
2022 - 2023		Draft
2022 - 2023		Submitted
2022 - 2023		Pending
2022 - 2023		On Hold
2021 - 2022		Complete

My Students

PROGRAM	FUNDS AVAILABLE
New Worlds Reading	\$320.95

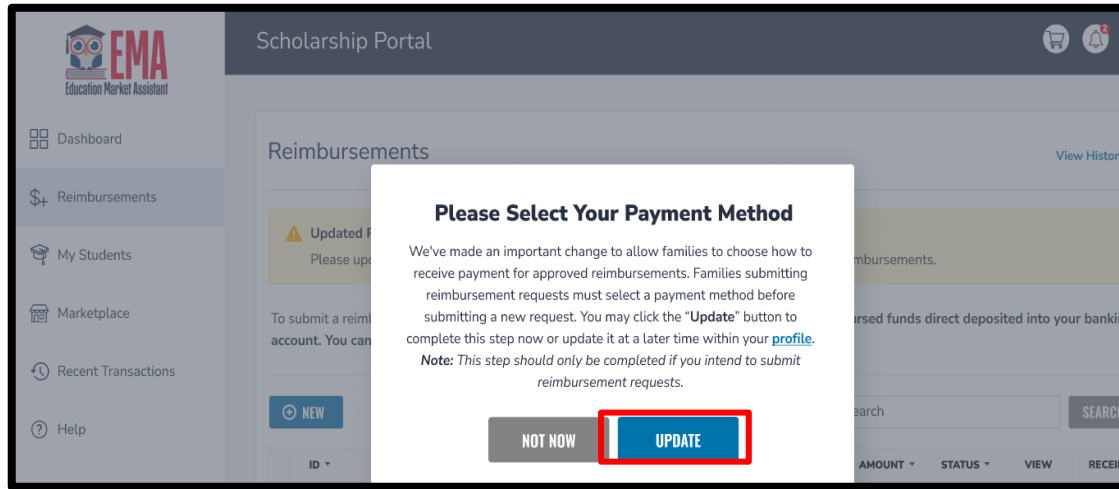
Available Scholarships

IMPORTANT NOTICE
You can only submit **one application per program** for FES-UA & FTC and FES-EO. Please make sure all students have been added to the **"My Students"** section on the left before applying. After you click "Apply" select all students you want to apply for new and renewing students.

Scholarship for Private Schools, Transportation, and Homeschool

Another way you'll be prompted to update your Payment Method is when you click on the **"Reimbursements"** tab on the left panel on the dashboard.

Setting Up Your Payment Profile

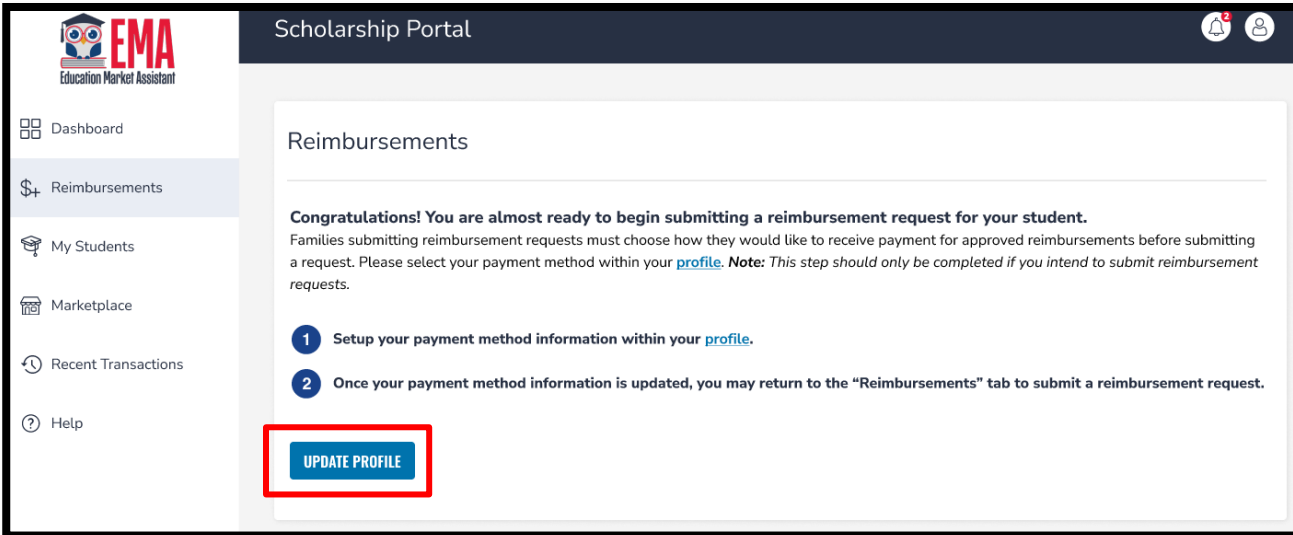


If you **HAVE** submitted a reimbursement previously and have **NOT** already selected your payment method, a window will appear asking you to update your payment method information. Again, this change is required to continue submitting reimbursements.

Note: If you bypass this popup, you will see another reminder on the Reimbursements page.

Click the **“UPDATE”** button to complete this step now or update it later within your profile.

Setting Up Your Payment Profile



If you **HAVE NOT** submitted a reimbursement previously **AND** have a funded student, you will see a message on the “Reimbursements” screen prompting you to select your payment method on your profile.

Click the **“Update Profile”** button to complete this step now or update it later within your profile.

Managing Funds Already On Your Reimbursement Card

This slide only pertains to families with a balance on their U.S. Bank Focus Card. They can:

Continue to use those funds until they run out.

- Families can use the card like any other debit card to make purchases or get cash.

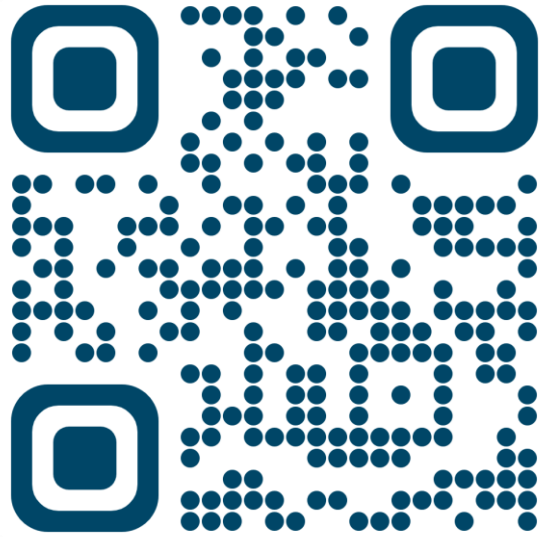
Withdraw them at a bank.

- Cardholders can make a cash withdrawal from a network of ATMs.

Call U.S. Bank and request a check for the balance that remains on the card.

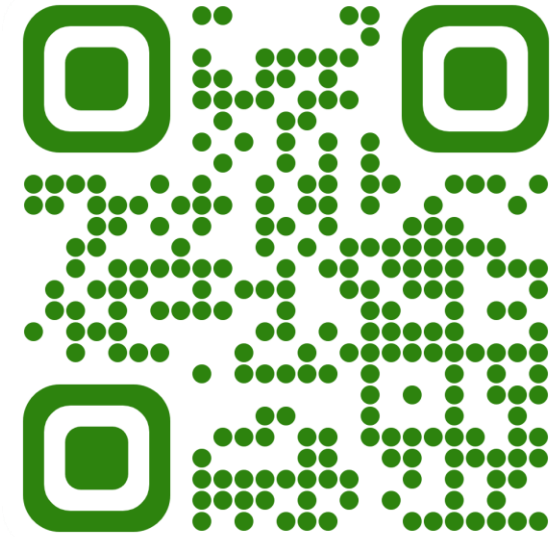
- Families can call the number on the back of their card (888-863-0681) to request to withdraw their funds. They should be prepared to verify their address on this call.

New reimbursement funds will not be added to the U.S. Bank Focus Card after January 8, 2024, if you need assistance with your U.S. Bank Focus Card, call (888) 863-0681.



English Video

We are pleased to announce improvements to our reimbursement services for Step Up's ESA scholarship families. This new process can be managed within the family's EMA account and will replace the U.S. Bank Focus Cards. This video covers how families may submit reimbursements in EMA by selecting a payment method before submitting new requests. This step should only be completed if you intend to submit reimbursement requests. Note: FES-UA renewal families are NOT impacted at this time and will continue to use the legacy system until further notice.



Spanish Video

Nos complace anunciar mejoras en nuestros servicios de reembolso para las familias de beca de la ESA de Step Up. Este nuevo proceso se puede administrar dentro de la cuenta EMA de la familia y sustituirá a las Tarjetas Focus de U.S. Bank. Este video cubre cómo las familias pueden presentar reembolsos en EMA seleccionando un método de pago antes de presentar nuevas solicitudes. Este paso sólo debe completarse si tiene intención de enviar solicitudes de reembolso.

Nota: Las familias de renovación de FES-UA NO se verán afectadas en este momento y continuarán utilizando el sistema anterior hasta nuevo aviso.

Personalized Education Program Parent/Guardian Handbook



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

Parent/Guardian Handbook



The 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.

Scholarship Continuity

Once a student qualifies for a scholarship, as long as the student is a resident of the state of Florida and eligible to enroll in a Florida public school, the student remains eligible for the scholarship until he or she returns to public school, graduates from High School or turns 21, whichever occurs first, regardless of income.

Student Categories

Eligible students will fall into one of the following categories:

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



Scholarship Amounts

The Family Empowerment Scholarship maximum allowable award amounts are based on the county of residence and grade of the student for the Eligible Private School and PEP scholarship programs, and the county of residence for the student for the Transportation scholarship.

Click [here](#) to view the 2023-24 Private School and PEP Scholarship Award Amounts.

Click [here](#) to view the 2023-24 Transportation Scholarship Award Amounts.

Refer to p. 6 – 7 of the Parent Handbook



FLORIDA TAX CREDIT SCHOLARSHIP PROGRAM AND FAMILY EMPOWERMENT SCHOLARSHIP FOR EDUCATIONAL OPTIONS

Basic Scholarship Amounts for 2023-24

If a student received scholarship funding in 2018-19 and has renewed and utilized the scholarship annually since, the amount of the award will be the greater of the amount calculated below OR these amounts: K-5th grade – \$6,519; 6-8th grade – \$6,815; 9-12th grade – \$7,111.

Note: The county is the one the student lives in according to their 2023-24 scholarship application.

District	Grades K-3	Grades 4-8	Grades 9-12
Alachua	\$7,915	\$7,288	\$7,226
Baker	\$8,487	\$7,842	\$7,779
Bay	\$8,003	\$7,376	\$7,314
Bradford	\$8,575	\$7,930	\$7,867
Brevard	\$7,971	\$7,344	\$7,282
Broward	\$8,070	\$7,428	\$7,365
Calhoun	\$8,805	\$8,160	\$8,097
Charlotte	\$8,355	\$7,728	\$7,666

District	Grades K-3	Grades 4-8	Grades 9-12
Lake	\$7,877	\$7,250	\$7,188
Lee	\$8,369	\$7,734	\$7,671
Leon	\$7,970	\$7,343	\$7,281
Levy	\$8,611	\$7,966	\$7,903
Liberty	\$8,963	\$8,318	\$8,255
Madison	\$8,447	\$7,802	\$7,739
Manatee	\$8,051	\$7,424	\$7,362
Marion	\$7,897	\$7,270	\$7,208

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

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

- The scholarship student's first and last name
- The name of the institution or course provider
- Course description
- Dates of course/service, including year
- Amount of tuition and fees
- Proof of payment, on institution letterhead, if applicable (refer to Proof of Payment section above).

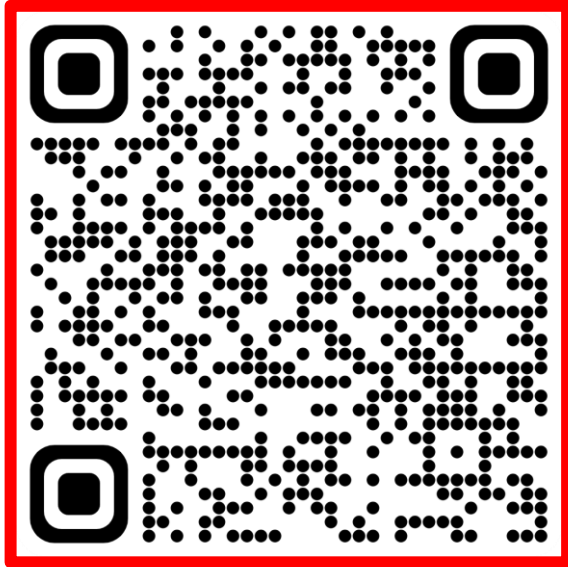
Refer to p. 19 of the Parent Handbook

PEP & Assessments

The screenshot shows the Florida Department of Education website. At the top left is the logo for the Florida Department of Education. To its right is a search bar with the text "What are you looking for today?". Further right are navigation links for "DIVISIONS", "EXPLORE", and "FEATURED TOPICS". Below the navigation is a dark blue banner with the text "Florida Tax Credit Scholarships". Underneath the banner is a breadcrumb trail: "Home | Schools | School Choice | K-12 Scholarship Programs | Florida Tax Credit Scholarships | Annual Assessment Requirement". The "Annual Assessment Requirement" link is highlighted with a red box. On the left side of the page, there is a sidebar with links for "Contact Us", "School Choice Resources for Parents", "Secured Login", "Directories", and "Facts & Figures". The main content area has the heading "ANNUAL ASSESSMENT REQUIREMENT" and a paragraph of text: "Florida Statutes require a private school participating in either prong of the Family Empowerment Scholarship Program, the Florida Tax Credit Scholarship Program or the Hope Scholarship Program to demonstrate academic accountability by annually administering or making provisions for students participating in a scholarship program to take one of the nationally norm-referenced tests identified by the Department of Education or the statewide assessments pursuant to Section 1008.22, Florida Statutes. Students with disabilities for whom standardized testing is not appropriate are exempt from this requirement."

In compliance with statute, all PEP families are required to provide a standardized assessment result prior to scholarship renewal. Please refer to <https://www.fldoe.org/schools/school-choice/k-12-scholarship-programs/ftc/annual-assessment-requirement.html> for further details. Information on the submission process will be coming in the spring.

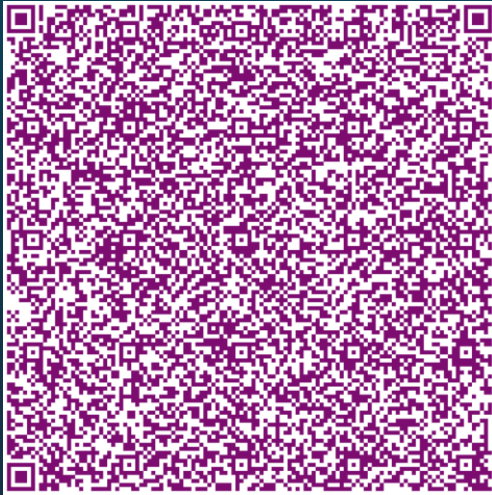
Funding Information and Resources



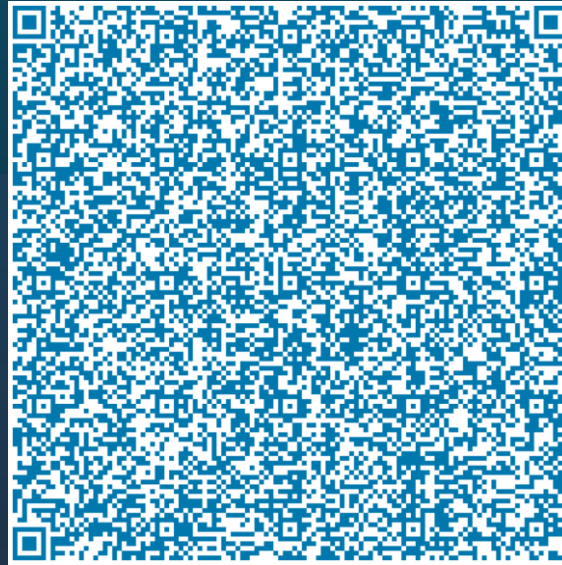
FTC/EO/PEP Parent Handbook



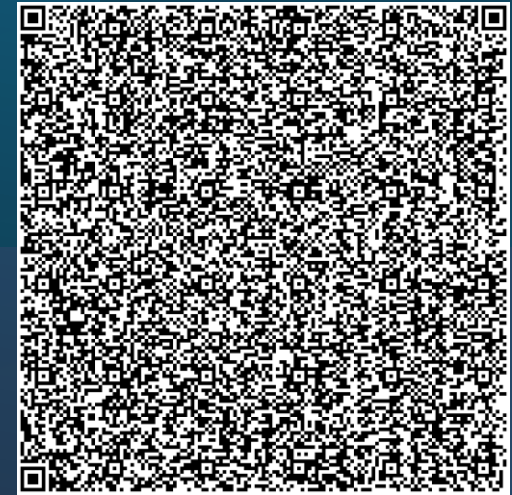
Purchasing Guide



October Open House



November Open House



December Open House

DID YOU MISS AN PEP OPEN HOUSE?
NOT TO WORRY, WE HAVE THE RECORDINGS HERE FOR YOUR REVIEW.

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Step Up Schools

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7 videos

Step Up Parents

[View full playlist](#)

3 videos

Step Up Parent

[View full playlist](#)

Three frequently visited YouTube Videos!



**Navigating
MyScholarShop in EMA**



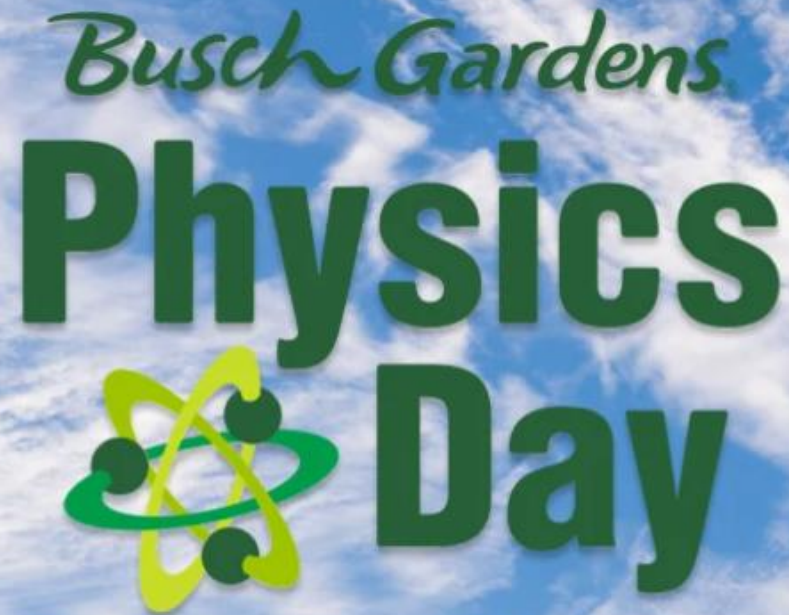
**How to Reset Your
Password in EMA and
Legacy**




**Finding Providers &
Services in the EMA
Marketplace for Parents**



SCAN ME



Busch Gardens
**Physics
Day**



Information regarding the purchase of a Theme Park Ticket may be found on pg. 6 of the purchasing guide! The Educational Benefit form is found on Appendix B of this guide.



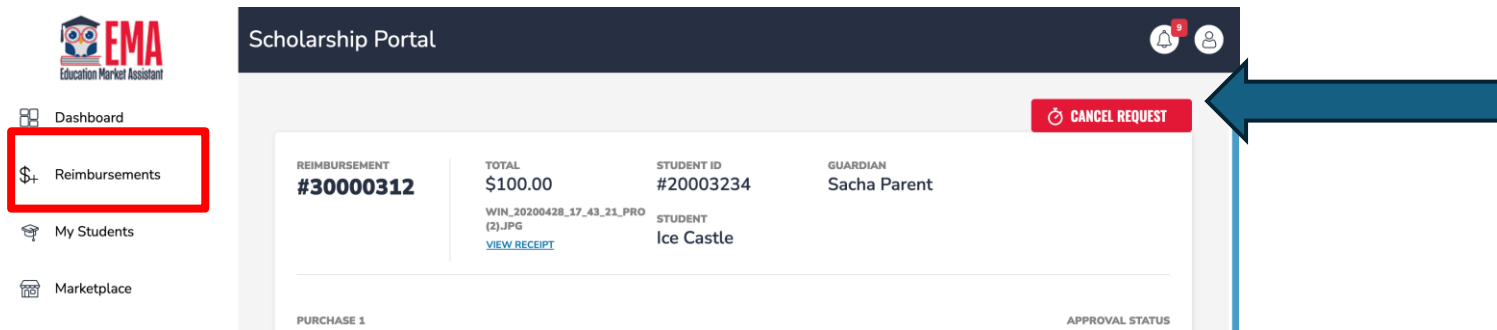
It's Q & A Time!

It's Q & A Time!

I want to switch to a different scholarship type for the upcoming year. Can you please explain the process for doing this?

At this time, our scholarship season is closed; however, when the scholarship season reopens in the spring, you will be able to apply for your desired scholarship in your EMA account.

How do we cancel or delete a reimbursement request if it's on hold? I can't provide the receipt requested with my child's name listed on it, so I'd like the funds returned to their account instead of being on hold.



The screenshot displays the Scholarship Portal interface. On the left is a navigation menu with the following items: Dashboard, Reimbursements (highlighted with a red box), My Students, and Marketplace. The main content area is titled "Scholarship Portal" and contains a reimbursement request card. The card includes the following information:

REIMBURSEMENT	TOTAL	STUDENT ID	GUARDIAN
#30000312	\$100.00	#20003234	Sacha Parent

Below the table, there is a "VIEW RECEIPT" link and a "STUDENT" field with the name "Ice Castle". In the top right corner of the card, there is a red "CANCEL REQUEST" button with a circular arrow icon. A blue arrow points from the right side of the image towards this button.

Log into your EMA account > Access your reimbursements via the “Reimbursement Tab” on the left panel > Locate the reimbursement and open it > Click on the cancel button in the upper right corner. *(This action can only be completed in EMA)*

It's Q & A Time!

Can you review the PEP parent/guardian responsibilities?

The parent of a student participating in PEP is responsible for

- Submitting a student learning plan to the SFO and revising the plan at least annually before renewal
- Procuring the services necessary to educate the student
- Requiring his or her student to take a nationally norm-referenced test identified by the Department of Education, or a statewide assessment under s. 1008.22, and providing assessment results to the SFO before the student's program renewal
- Using program funds only for authorized purposes that serve the student's educational needs. The parent of a scholarship student who receives a payment, refund, or rebate of PEP funds in any manner is in violation of scholarship program law and is subject to denial or revocation of program eligibility.
- Fulfilling financial obligations for all eligible expenses in excess of the amount of the scholarship as applicable.
- Renewing participation in the program each year and providing any necessary documentation in support of the application or renewal.
- Signing an agreement with the SFO annually, to include a sworn compliance statement, and meeting deadlines and other requirements established by the SFO.

Contact Us

Monday – Friday 8:00 AM – 5:00 PM ET



**Call: 877-735-
7837**



**Chat:
www.stepupforstudents.org**



**Thank you
for attending
our webinar**

**Upcoming Webinar
February 22, 2024**

See you next time!