PEP OPEN HOUSE

PERSONALIZED EDUCATION PROGRAM

Personalized Education Plan (PEP) Open House

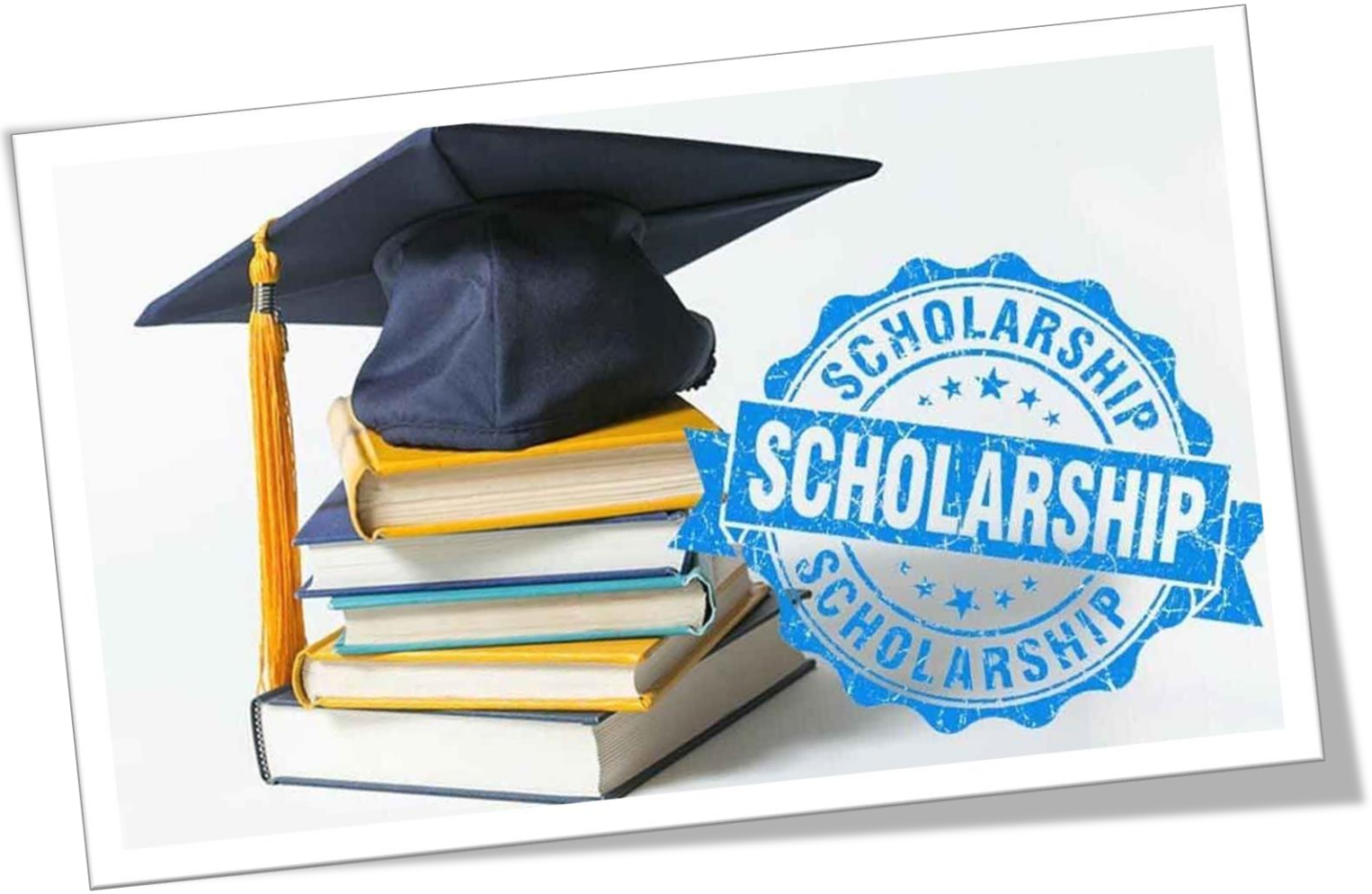
January 25th, 2024

Step Up for students

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.



Scholarship Updates

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

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.

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

PIPER	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.	https://www.playpiper.com/
LuminousMinds	**Luminous Minds** offers premium reading comprehension Phonics & Sight Word worksheets for parents and teachers, making early learning accessible for all.	https://www.luminousmindsinc.com/
ESTD. 2020 LEAF'D BOX™ GARDENING REIMAGINED	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.	https://leafdbox.com/
EXPLORATION EDUCATION	Exploration Education focuses on project-based learning that makes it enjoyable for students to learn and easy for the parent or teacher to implement.	https://explorationeducation.com/

Subject: AVAILABLE NOW: More ways to be reimbursed!
Sent: 1.9.24

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

More Ways to Receive Reimbursements

Choose How to Receive Payment for Approved Reimbursements

Important Notice

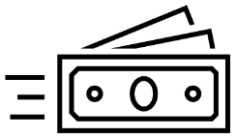
We are pleased to announce improvements to our reimbursement services for Step Up's ESA scholarship families. This new process can be managed within the family's EMA account and will replace the U.S. Bank Focus Cards.

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.*

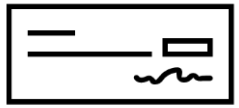
Renewal FES-UA students are not impacted at this time and will continue to use the legacy system until further notice.

Payment Method Options

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



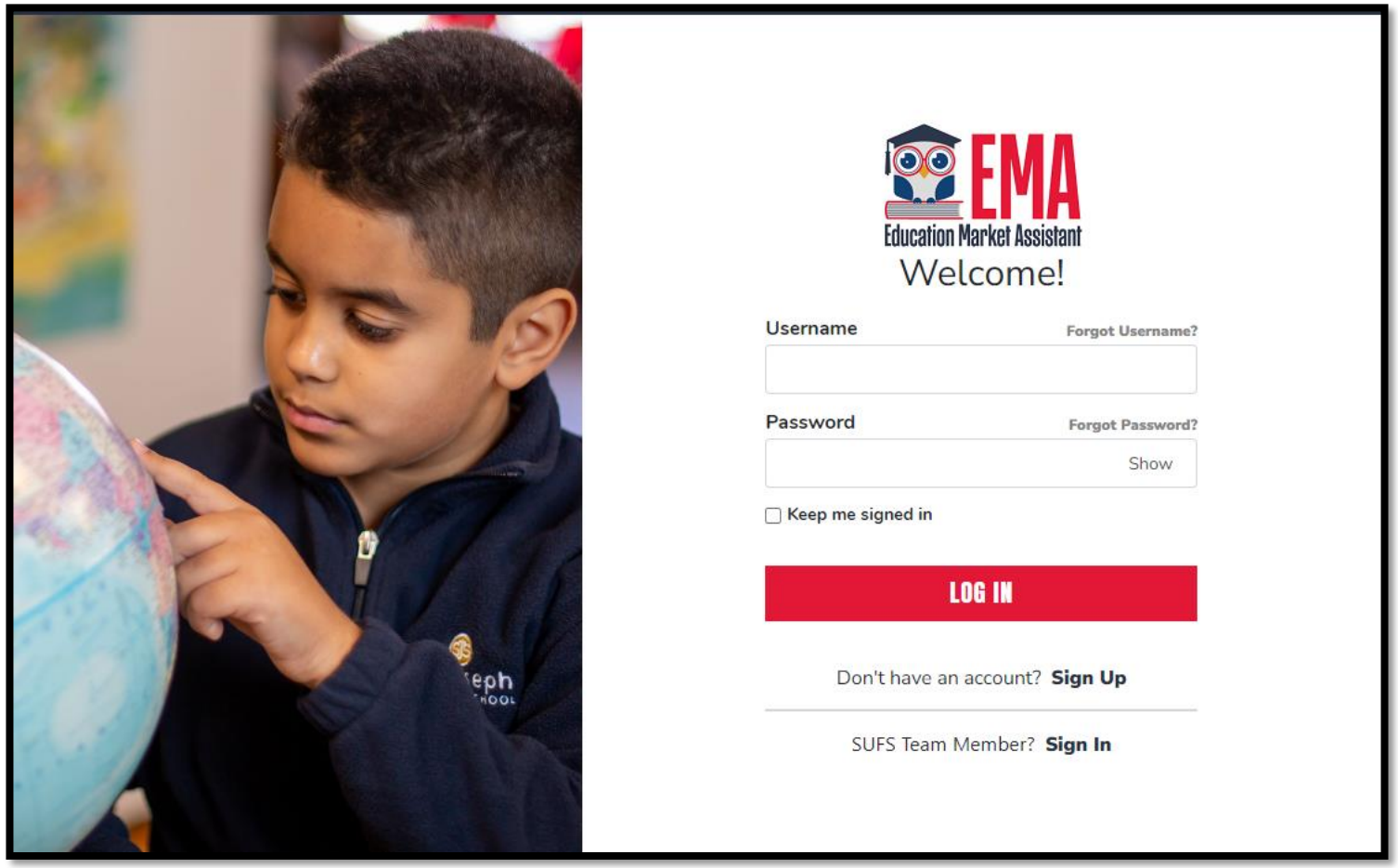
Direct Bank Transfer: Securely deposit funds directly into your bank account via an ACH transfer.



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.

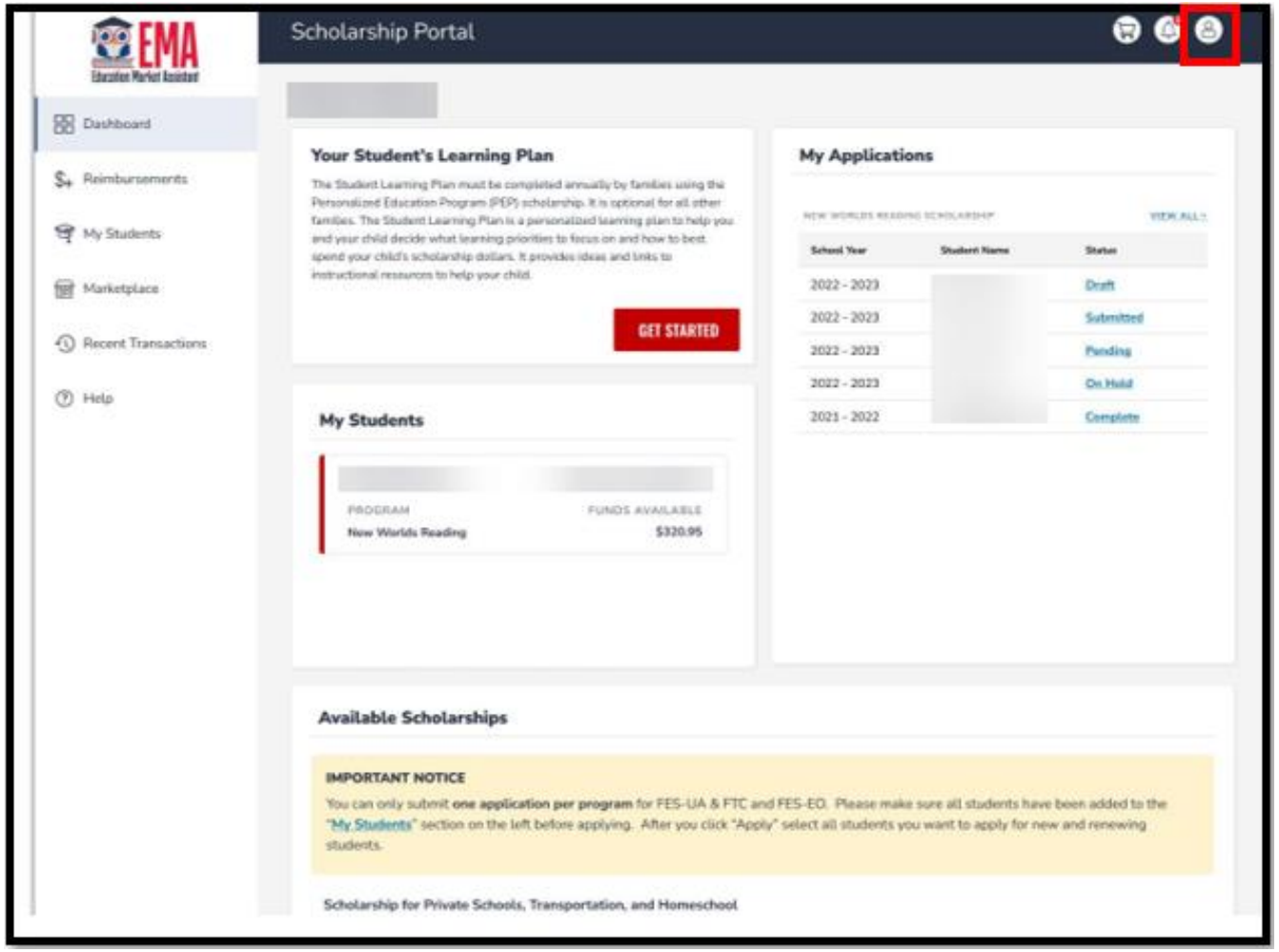
PayPal: Opt for PayPal, a widely used and trusted online payment platform, to receive your reimbursement with ease.

Setting Up Your Payment Profile



Log in to your EMA account.

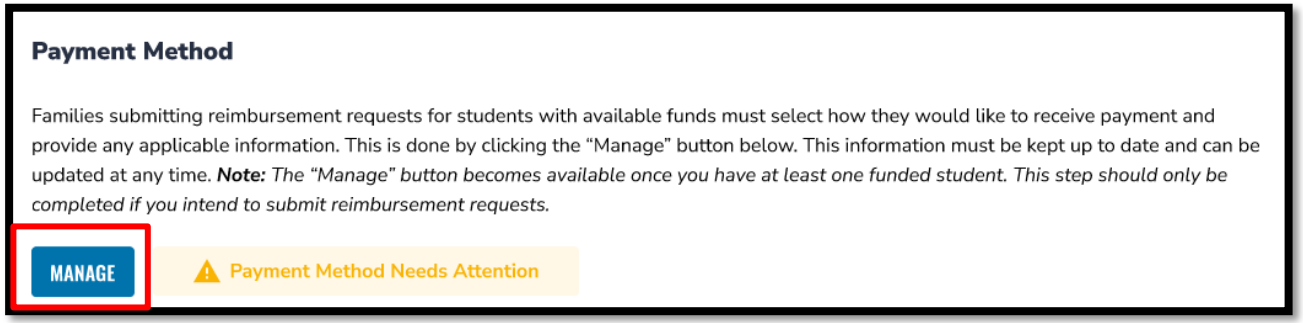
Setting Up Your Payment Profile



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

Setting Up Your Payment Profile

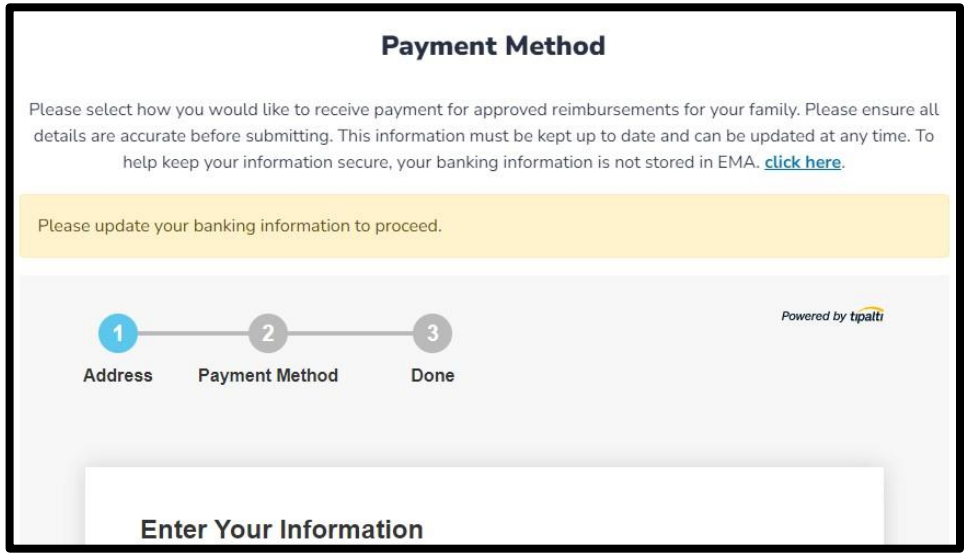
Scroll down to the "Payment Method" section on your profile and click the "Manage" button. This information must be kept up to date and can be updated at any time, however, the address should not be altered and must match the information in your guardian profile.



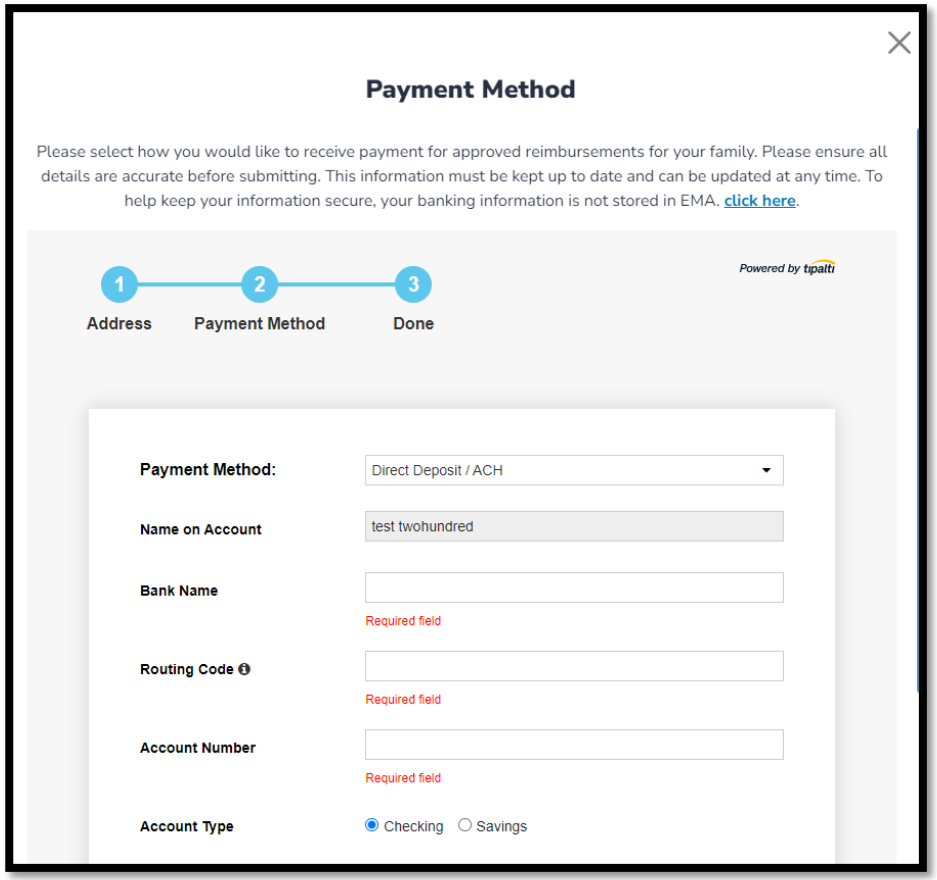
Note: The "Manage" button becomes available after the profile is saved for the first time.

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.



Setting Up Your Payment Profile



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

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

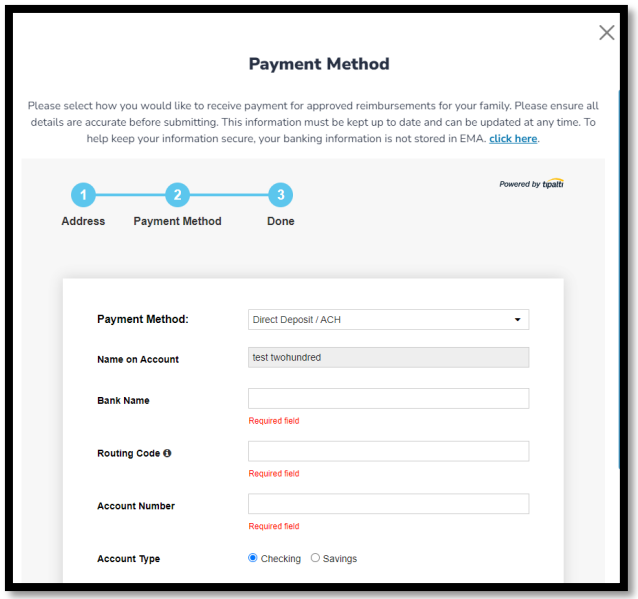
The fields will vary based on the Payment Method selection.

Please ensure all details are accurate before submitting.

Setting Up Your Payment Profile

Payment Options

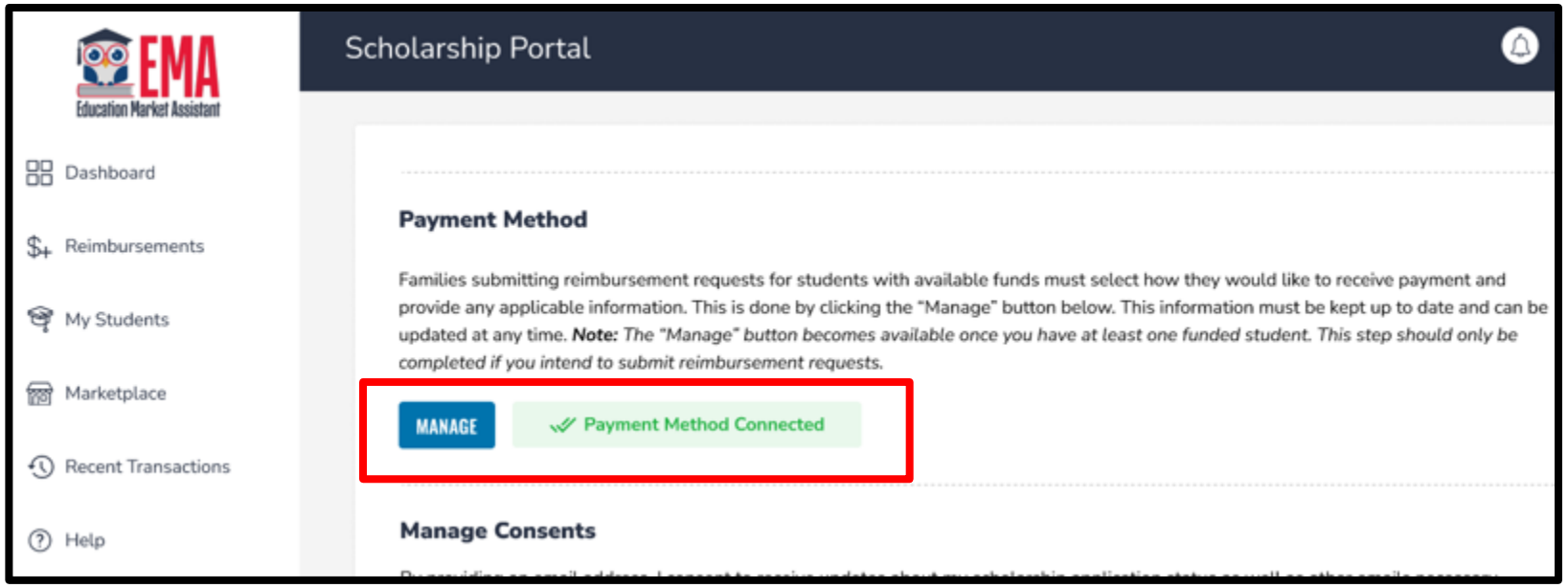
Direct Deposit: Once a reimbursement request is approved, Step Up will initiate the transfer of funds which will be electronically transferred into the families' bank account two business days later. This option requires a bank account and is convenient for families who prefer an automated process.



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.

Setting Up Your Payment Profile



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

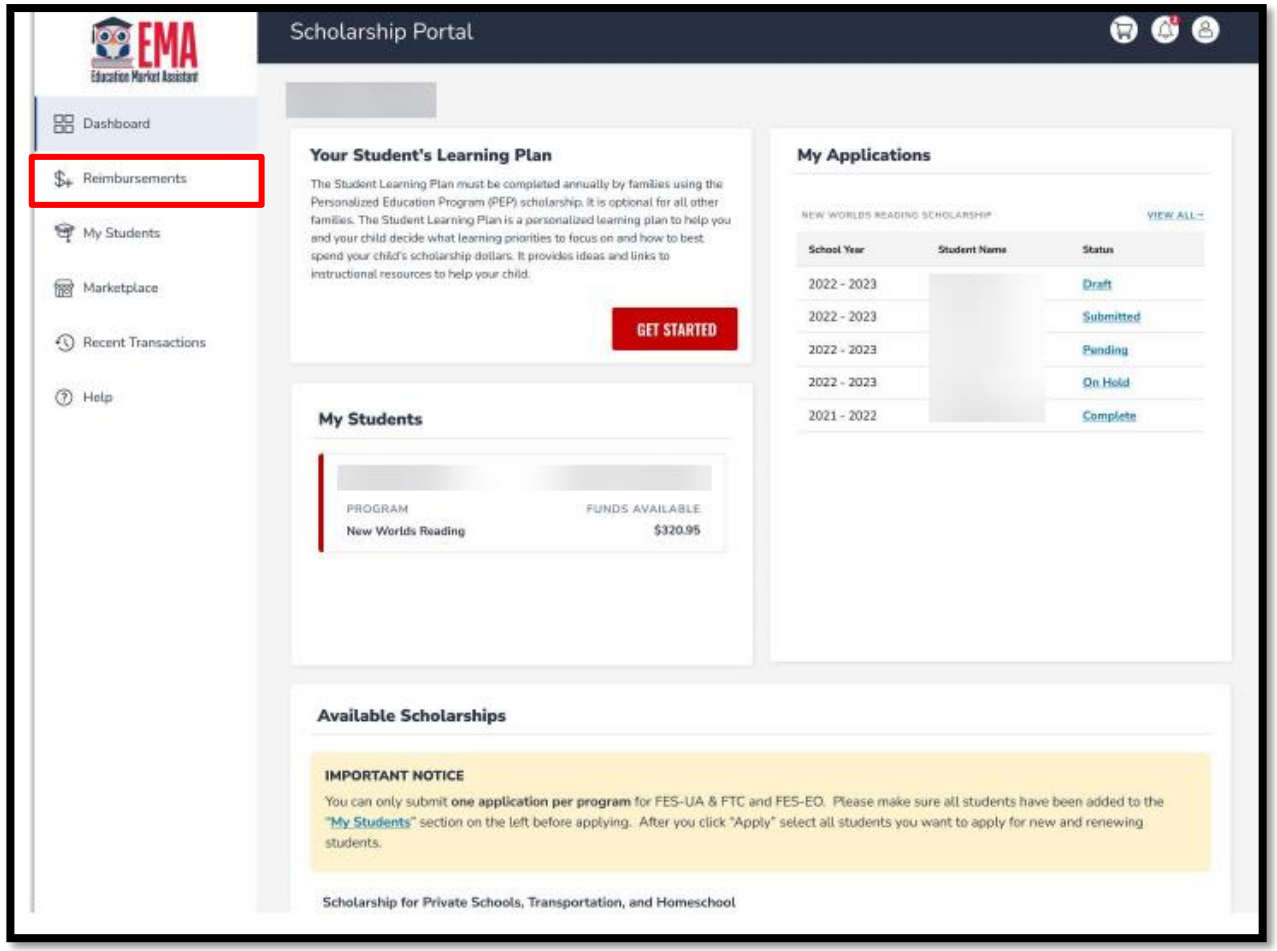
Please note: It may take up to 12 hours for this change to be reflected in your EMA account. If you continue to see the "Payment Method Needs Attention" message after updating your payment method, please log out, open a new window and log back in.

Not Ready to Update Right Now?

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

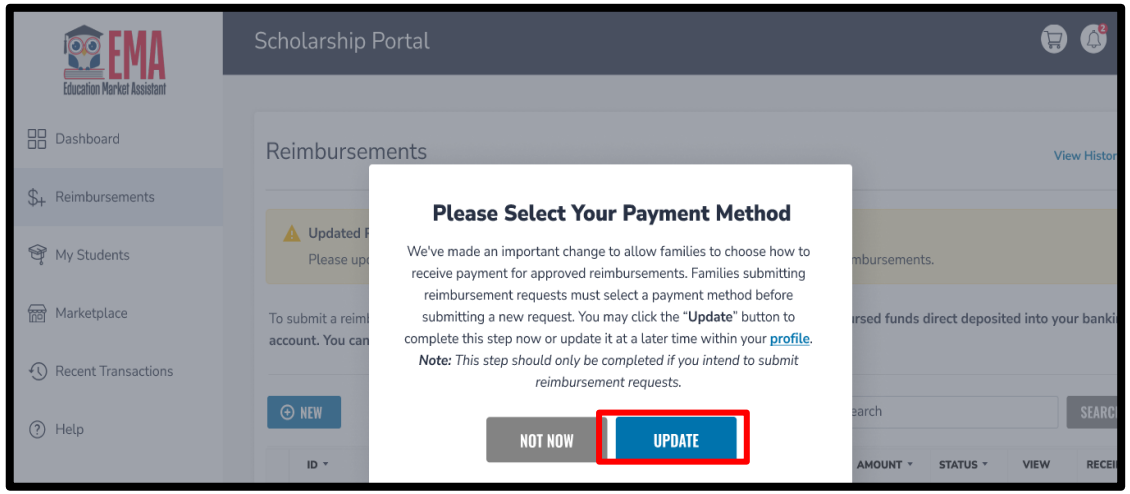
If you do not update this information in your profile today, you will be reminded on various screens in EMA before you can submit a reimbursement.

Setting Up Your Payment Profile



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

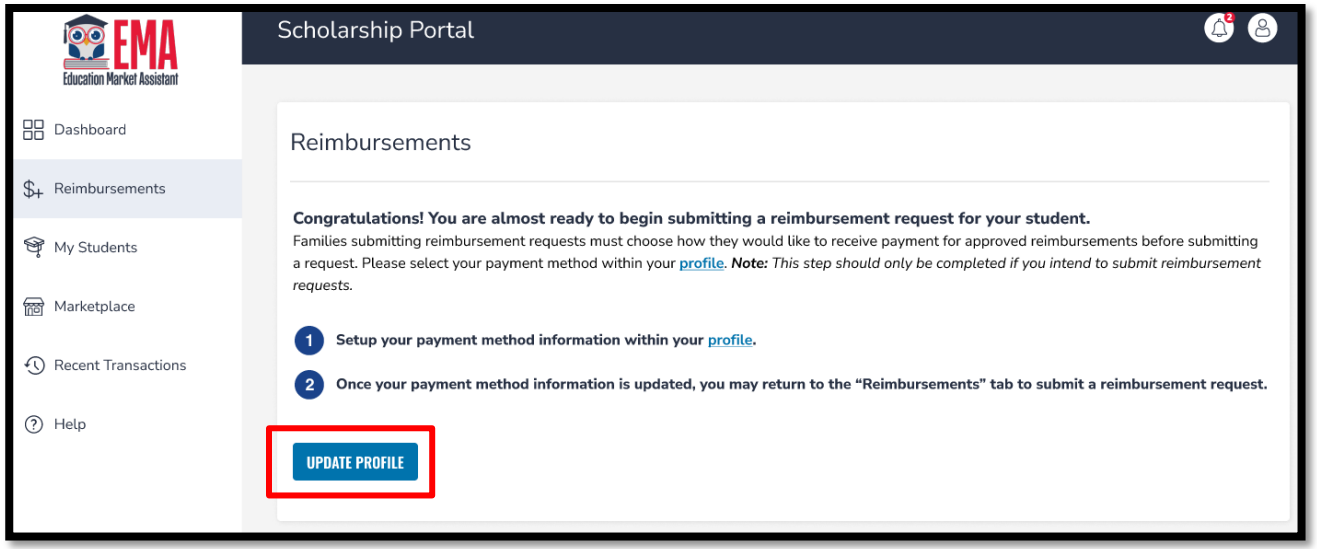


Note: If you bypass this popup, you will see another reminder on the Reimbursements page.

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.

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

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.

Refer to p. 5 of the Parent Handbook

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

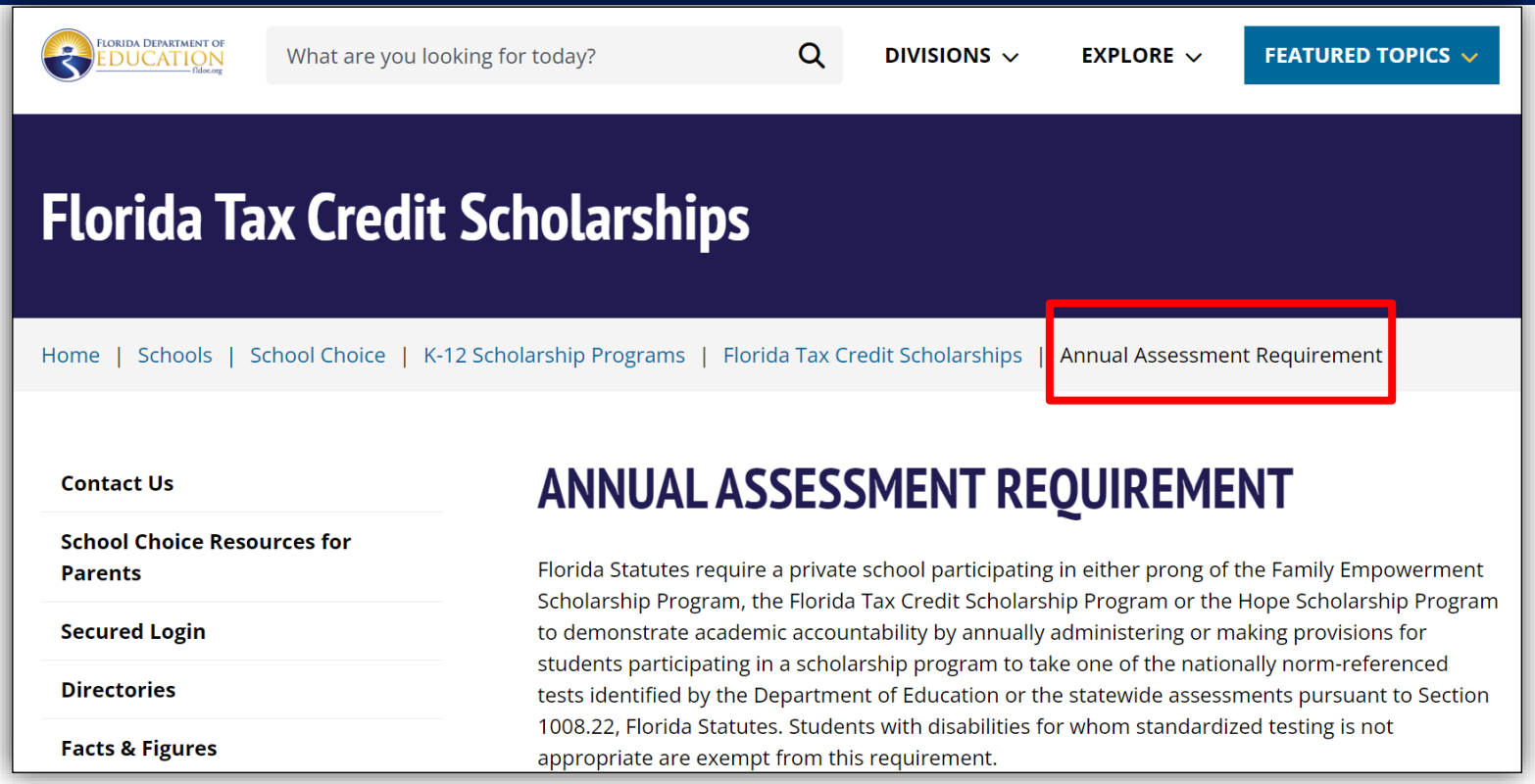
Fees for Eligible Post-Secondary Institution, a Home Education Instructional Program, a DOE-Approved Online Provider, and a DOE-Approved Online Course

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



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.stml 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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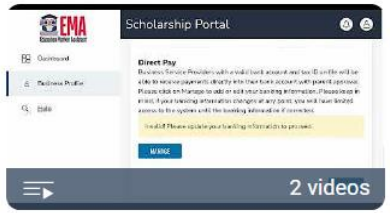

Hope WV Provider

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Hope WV Parent

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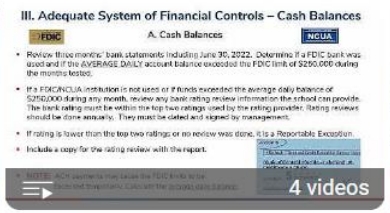

Step Up Schools

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Step Up Parents

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Step Up Parent

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Three frequently visited YouTube Videos!

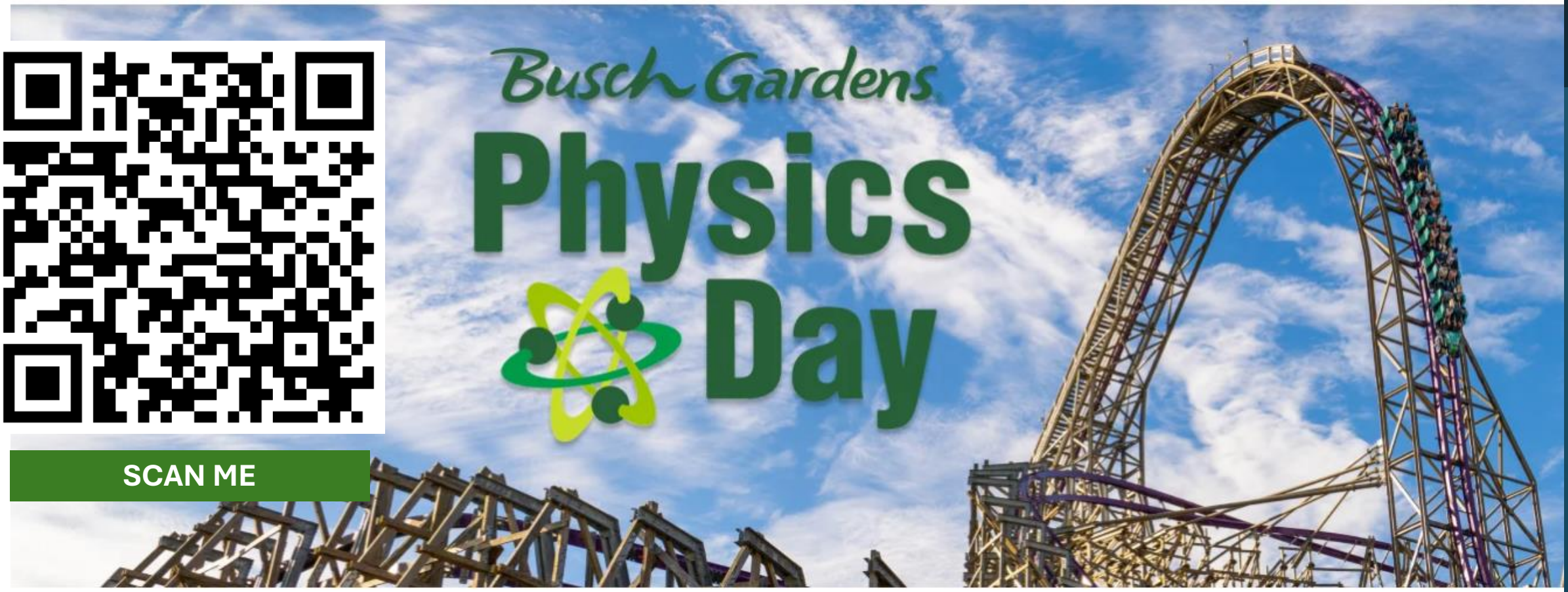
Navigating MyScholarShop in EMA

How to Reset Your Password in EMA and Legacy

Finding Providers & Services in the EMA Marketplace for Parents

Busch Gardens TAMPA BAY

Park Info | Things to Do | Events | Buy Upgrades | Pass Members



SCAN ME

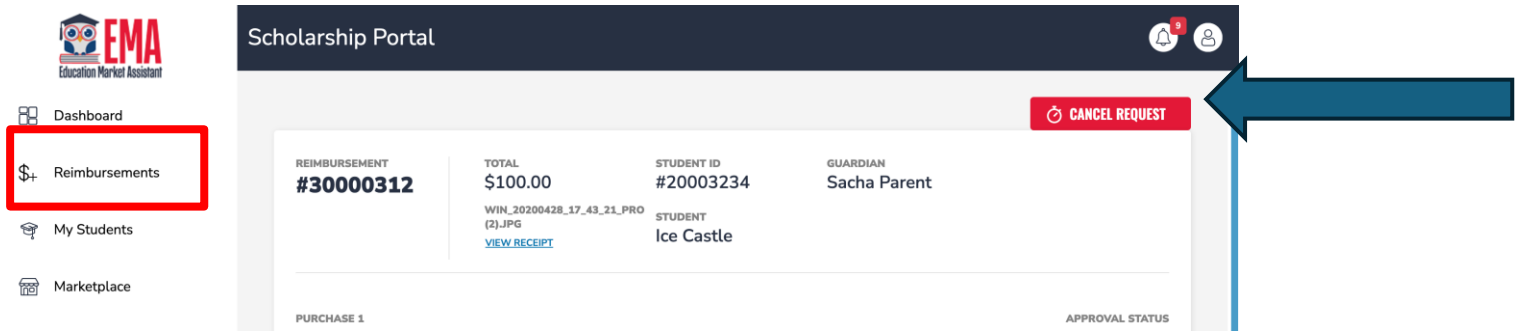
Information regarding the purchase of a Theme Park Ticket may be found on pg. 6 of the purchasing guide! The Educational Benefit form is found on Appendix B of this guide.

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.



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!