

Service Provider Account Types and Document Checklist

August 2023



Table of Contents

Service Provider Account Types	2
Who will create a “Business” account?.....	2
Who will create a “Personal” account?.....	2
Who will create both a “Business Account/Personal” account?.....	2
Required Documents by Provider Type	3
Specialized Service Providers	3
Tutoring Services	4
Full-time tutor	5
Part-time tutor	5
Choice Navigator	6
Horse Therapy	7
Public School or School District approved by FLDOE	7
Approved VPK.....	8
Elective or Enrichment Providers.....	8
Home Education Program/Home Education Instructional Program.....	10
Music and Art Therapy.....	11
Job Coaches	12
Tuition and Fees for an Approved Pre-apprenticeship Program.....	14

Service Provider Account Types

Please note that if you have a Step Up For Students Education Market Assistant (EMA) parent account, you must create a separate provider account **using a different email address**.

In EMA, providers must create a business and/or personal account.

Businesses must have a Business Account to receive direct payments through the EMA platform. If a service requires a credential, all employees who will provide services must also create a Personal Account. **All payments will be made to a business account.**

Who will create a “Business” account?

Create a “**Business**” account if you . . .

- Owner/operator of a business that will bill for services
OR
- Contract with or employ service providers, whose services to students will be payable to your business

**NOTE: All employees of a business who provide services that require individual credentials must create a “Personal” account as well. Once employee personal accounts are created, the business must approve/connect the employee “Personal” accounts to the “Business” account.*

Who will create a “Personal” account?

- Create a “**Personal**” account if you:
 - Have a credential or license that qualifies you to provide services, *and*
 - Are employed by, or contract with, a “Business” account on the Provider Marketplace

**NOTE: A “Personal” account will not receive payment. Direct payment will be made to the associated Business account. Individuals who will create a Personal account must provide the required documentation based on service type to be approved. Please check the required document checklist below for details.*

Who will create both a “Business Account/Personal” account?

Create both a “**Business/Personal**” account if you:

- Meet the criteria above for creating a “Business” account, *and*
- Have a credential or license that qualifies you to provide services

Required Documents by Provider Type

Below is a list of documents that current and new providers will be required to submit when creating an EMA account. Parents/guardians and providers can find details about each of these services and what they entail in the Provider Handbook and scholarship purchasing guides.

[FTC/FES-EO Purchasing Guide](#)

[FES-UA Purchasing Guide](#)

Specialized Service Providers

I am an accountant/business administrator for a therapeutic business creating an EMA account on behalf of the business. I do not work with students directly. There are other credentialed therapists who work with students.

Create a “Business” account ONLY.

Create a “Business” account only and upload your W-9 information. Your employees or contractors who provide services will need to create a “Personal” account. Once their “Personal” accounts are created, you will need to approve their request to link their “Personal” accounts to your business. The business will receive direct payment.

Business Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

I am the business owner of a therapeutic business. My accountant/business administrator will or has already created a “Business” accountant for the business. I provide services as a licensed therapist, and I have employees or contractors who also provide services to students.

Once the business account is created, create a “Personal” account.

The “Business” account can be created by you or someone who manages accounting and billing for you and your providers. Once your “Business” account is created, you and the licensed therapists will create “Personal” accounts. After the “Personal” accounts are created, you will need to request to join your associated “Business” and the “Business” account owner will approve/link your and their “Personal” accounts to the business. The business will receive direct payment.

Personal Account Requirements

- Copy of Florida license with legible license number

Note: OTA/RBT/Interns cannot create “Business” accounts. OTA/RBT/Interns will need to be connected to a Business.

I am an OTA/RBT/Intern who works for a therapeutic business. I do not own the business and my clients do not pay me directly.

Once the business account is created, create a “Personal” account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business” and the “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Personal Account Requirements

- Copy of Florida license with legible license number

I am a licensed therapist who works for a therapeutic business. I do not own the business and my clients do not pay me directly.

Once the business account is created, create a “Personal” account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business”. The “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Personal Account Requirements

- Copy of Florida license with legible license number

I am a licensed therapist who works for a therapeutic business. My clients pay me directly, but I do not have an EIN.

Create a combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and your service provider credentials. Use your SSN or ITIN instead of an EIN. The business will receive direct payment.

Combined Business/Personal Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS
- Copy of Florida license with legible license number

Tutoring Services

I am a business administrator for/owner of a tutoring business. I have been tasked with creating an EMA account. I do not work with students directly. There are credentialed employees who tutor students.

Create a “Business” account ONLY.

Create a “Business” account only and upload your W-9 information. Your credentialed employees who tutor students will need to create a “Personal” account. Once their “Personal” accounts are created, you will approve/link their “Personal” accounts to the business. The business will receive direct payment.

Business Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

I am the business owner of a tutoring business. I provide tutoring services, and I have employees or contractors who also provide services to students.

Once the “Business” account is created, create a “Personal” account.

The “Business” account can be created by you or someone who manages accounting and billing for you/your providers. Once your “Business” account is created, you and the credentialed employees will create “Personal” accounts and upload your individual credentials. After the “Personal” accounts are created, you will need to request to join your associated “Business” and the “Business” account owner will approve/link your and their “Personal” accounts to the business. The “Business” account will receive direct payment.

Personal Accounts for Full-Time Tutors

- Full-Time Private Tutoring Provider Participation Agreement

- Copy of a valid, current, teaching certificate for the subject or grade level
- Valid Certificate of Occupancy, if applicable

Personal Accounts for Part-Time Tutors

- Copy of a valid, current, Florida Educator’s Certificate, pursuant to Florida Statute 1012.56

OR

- Copy of adjunct teaching certificate from a Florida school district pursuant to Florida Statute 1012.57

OR

- A bachelor’s or graduate degree in the subject area. This may be a copy of the bachelor’s or graduate degree diploma or official college transcript stating the degree conferred.

OR

- Copy of one of the documents listed in the Provider Handbook to demonstrate mastery of subject area knowledge.

Full-time tutor

I am a full-time tutor for a tutoring business. I am not a business owner.

Create a “Personal” account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business” and the “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Personal Accounts for Full-Time Tutors

- [Full-Time Private Tutoring Provider Participation Agreement](#)
- Copy of a valid, current, teaching certificate for the subject or grade level
- Valid Certificate of Occupancy, if applicable

Part-time tutor

I am a part-time tutor for a tutoring business. I am not a business owner.

Create a “Personal” account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business” and the “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Personal Accounts for Part-Time Tutors

- Copy of a valid, current, Florida Educator’s Certificate, pursuant to Florida Statute 1012.56

OR

- Copy of adjunct teaching certificate from a Florida school district pursuant to Florida Statute 1012.57

OR

- A bachelor’s or graduate degree in the subject area. This may be a copy of the bachelor’s or graduate degree diploma or official college transcript stating the degree conferred.

OR

- Copy of one of the documents listed in the Provider Handbook to demonstrate mastery of subject area knowledge

Choice Navigator

I am a choice navigator business owner. I do not provide choice navigator services. I have several other employees who provide services to students and are paid directly by my/the business.

Create a “Business” account ONLY

Create a “Business” account only and upload your W-9 information. Employees who provide services will need to create a “Personal” account. Once their “Personal” accounts are created, you will approve/link their “Personal” accounts to the business. The business will receive direct payment.

Business Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

I own a tutoring/choice navigator service business and would like to become a choice navigator provider. I have an EIN. There are other employees who work with me or for my business that provide services to students and are paid by my business.

Create a combined “Business/Personal” account ONLY.

The “Business” account can be created by you or someone who manages accounting and billing for you and your providers. Once your “Business” account is created, you and the credentialed employees will create “Personal” accounts. After the “Personal” accounts are created, you will need to request to join your associated “Business” and the “Business” account owner will approve/link your and their “Personal” accounts to the business. The business will receive direct payment.

Combined Personal Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS
- Copy of a valid, current, Florida educator’s certificate, pursuant to Florida Statute 1012.56

OR

- Copy of adjunct teaching certificate from a Florida school district pursuant to Florida Statute 1012.57

OR

- Copy of one of the documents outlined to demonstrate

I am a choice navigator and/or a tutor. I do not have an EIN. There are no other employees who work with me or for my business that provide services to students.

Create a combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and your service provider credentials. Use your SSN or ITIN instead of an EIN. The business will receive direct payment.

Combined Personal Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN

- Bank information
- Name, as it is registered with the IRS
- Copy of a valid, current, Florida educator’s certificate, pursuant to Florida Statute 1012.56

OR

- Copy of adjunct teaching certificate from a Florida school district pursuant to Florida Statute 1012.57

OR

- Copy of one of the documents outlined to demonstrate

I am a Choice Navigator who works for a business. I am not a business owner.

Once the “Business” account is created by the business, create a “Personal” Account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business” and the “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Personal Account Requirements

- Copy of a valid, current, Florida educator’s certificate, pursuant to Florida Statute 1012.56

OR

- Copy of adjunct teaching certificate from a Florida school district pursuant to Florida Statute 1012.57

OR

- Copy of one of the documents outlined to demonstrate

Horse Therapy

I am an accountant for/I own a business that provides horse therapy to students. I have other employees who provide services.

Create a combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and your service provider credentials. The business will receive direct payment.

Combined Business/Personal Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS
- Demonstration of center membership or accreditation in Professional Association of Therapeutic Horsemanship International

I provide horse therapy as an employee for a business, but I do not own a business.

The business will create a “Business” account. You will not need to create a “Personal” account.

Public School or School District approved by FLDOE

I am an accountant/business administrator for an approved Public School or School District approved by FLDOE.

Create a combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and tuition/fees. The business will receive direct payment.

Business Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS and FDOE

I am a teacher who works for a Public School or School District approved by FLDOE that provides VPK services to students.

The school/district will create a “Business” account. You will not need to create a “Personal” account.

Approved VPK

I am an accountant/business administrator for or I own a business that is an approved VPK business. I also provide VPK services to students.

Create a “Business” account ONLY.

Create a “Business” account. Upload your W-9 information and tuition/fees. The business will receive direct payment.

Combined Business/Personal Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

- Copy of the tuition and fee schedule for the current school year

This should include any fees for additional services for students with special needs, if applicable. The published rate should be used as the standard amount charged.

Note: For VPK/School Readiness Providers to be approved, their school must be on the [Early Learning Coalition \(ELC\)](#) approved list of providers that is submitted to Step Up For Students annually in July. Step Up For Students sends reminders each July to all ELC’s, so it is imperative that the ELC’s inform Step Up For Students of any contact changes to ensure receipt of information.

I am a teacher who works for an approved VPK provider that provides VPK services to students.

The business will create a “Business” account. You will not need to create a “Personal” account.

Elective or Enrichment Providers

I am an enrichment business owner or business administrator/accountant. I do not provide enrichment services. I have several other employees who provide services to students and are paid directly by my/the business.

Create a “Business” account ONLY.

Create a “Business” account only and upload your W-9 information. Employees who provide services will need to create a “Personal” account. Once their “Personal” accounts are created, you will approve/link their “Personal” accounts to the business. The business will receive direct payment.

Business Account Requirements:

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

I own an enrichment business owner or business administrator/accountant. I provide enrichment services and I have several other employees who provide services to students and are paid directly by my/the business.

Create a combined “Business/Personal” account ONLY.

The “Business” account can be created by you or someone who manages accounting and billing for you and your providers. Once your “Business” account is created, you and the credentialed employees will create “Personal” accounts. After the “Personal” accounts are created, you will need to request to join your associated “Business” and the “Business” account owner will approve/link your and their “Personal” accounts to the business. The “Business” account will receive direct payment.

Combined Business/Personal Account Requirements:

- Items to complete W-9
 - EIN *or* SSN *or* ITIN
 - Bank information
 - Name, as it is registered with the IRS

Eligible providers for enrichment or elective subjects should upload proof with one of the following:

- A valid or expired Florida Educator’s Certificate

OR

- At least 3 years of experience in the relevant subject area as demonstrated by employment records

OR

- Currently enrolled in a postsecondary educational institution as a student of the relevant subject area

OR

- A degree from a postsecondary educational institution in the relevant subject area

OR

- A certification or national accreditation in the relevant subject area

I am an enrichment service provider. I do not have an EIN. There are no other employees who work with me or for my business that provide services to students.

Create a combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and your service provider credentials. Use your SSN or ITIN instead of an EIN. The business will receive direct payment.

Combined Business/Personal Account Requirements:

- Items to complete W-9
 - EIN *or* SSN *or* ITIN
 - Bank information
 - Name, as it is registered with the IRS

Eligible providers for enrichment or elective subjects should upload proof with one of the following:

- A valid or expired Florida Educator’s Certificate

OR

- At least 3 years of experience in the relevant subject area as demonstrated by employment records

OR

- Currently enrolled in a postsecondary educational institution as a student of the relevant subject area

OR

- A degree from a postsecondary educational institution in the relevant subject area

OR

- A certification or national accreditation in the relevant subject area

I am an elective instructor (not for a school) who works for a business. I am not a business owner.

Once the “Business” account is created, create a “Personal” account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business” and the “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Personal Account Requirements:

Eligible providers for enrichment or elective subjects should upload proof with one of the following:

- A valid or expired Florida Educator’s Certificate

OR

- At least 3 years of experience in the relevant subject area as demonstrated by employment records

OR

- Currently enrolled in a postsecondary educational institution as a student of the relevant subject area

OR

- A degree from a postsecondary educational institution in the relevant subject area

OR

- A certification or national accreditation in the relevant subject area

Home Education Program/Home Education Instructional Program

I am an accountant/business administrator for a Home Education Program/Home Education Instructional Program.

Create a Combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and Home Education Program/Home Education Instructional Program agreement. The business will receive direct payment.

Combined Business/Personal Account Requirements:

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

- [Home Education Program/Home Education Instructional Program Provider Participation Agreement](#)

I am a teacher who works for a Home Education Program/Home Education Instructional Program that provides services to students.

The Home Education Program/Home Education Instructional Program will create a “Business” account. You will not need to create a “Personal” account.

Music and Art Therapy

I am a music and art therapy business owner or business administrator/accountant. I do not directly provide music and art therapy services. I have several other employees who provide services to students and are paid directly by my/the business.

Create a “Business” account ONLY.

Create a “Business” account only and upload your W-9 information. Employees who provide services will need to create a “Personal” account. Once their “Personal” accounts are created, you will approve/link their “Personal” accounts to the business. The business will receive direct payment.

Business Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

I own a music and art therapy business owner. I provide music and art therapy services and I have several other employees who provide services to students and are paid directly by my/the business.

Create a Combined “Business/Personal” account ONLY.

The “Business” account can be created by you or someone who manages accounting and billing for you and your providers. Once your “Business” account is created, you and the credentialed employees will create “Personal” accounts. After the “Personal” accounts are created, you will need to request to join your associated “Business” and the “Business” account owner will approve/link your and their “Personal” accounts to the business. The “Business” account will receive direct payment.

Combined Business/Personal Account Requirements:

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS
- Demonstration of certification by the Certification Board for Music Therapists
OR
- Demonstration of certification by the Certification Board for Art Therapists

I am a music and art therapist provider. I do not have an EIN. There are no other employees who work with me or for my business that provide services to students.

Create a combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and your service provider credentials. Use your SSN or ITIN instead of an EIN. The business will receive direct payment.

Combined Business/Personal Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS
- Demonstration of certification by the Certification Board for Music Therapists
OR
- Demonstration of certification by the Certification Board for Art Therapists

I am a music and art therapist who works for a business. I am not a business owner.

Once the “Business” account is created by the business, create a “Personal” account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business” and the “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Job Coaches

I am a job coach business owner or business administrator/accountant. I do not directly provide job coach services. I have several other employees who provide services to students and are paid directly by my/the business.

Create a “Business” account ONLY.

Create a “Business” account only and upload your W-9 information. Employees who provide services will need to create a “Personal” account. Once their “Personal” accounts are created, you will approve/link their “Personal” accounts to the business. The business will receive direct payment.

Business Account Requirements:

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

I own a job coach business owner. I provide job coach services and I have several other employees who provide services to students and are paid directly by my business.

Create a combined “Business/Personal” account ONLY.

The “Business” account can be created by you or someone who manages accounting and billing for you and your providers. Once your “Business” account is created, you and the credentialed employees will create “Personal” accounts. After the “Personal” accounts are created, you will need to request to join your associated “Business” and the “Business” account owner will approve/link your and their “Personal” accounts to the business. The “Business” account will receive direct payment.

Combined Business/Personal Account Requirements

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

Eligible job coaches should upload proof with one of the following:

- Hired by the private school as a job coach
OR
- Hired by the public-school system as a job coach
OR
- Meet the criteria/training of the Florida Agency for Persons with Disabilities for job coaches
OR
- Meet the criteria/training of the Florida Association of Rehabilitation Facilities
OR
- Have an Association of Community Rehabilitation Educators (ARCE) certification
OR
- Have an Association of People Supporting Employment First (APSE) certification
OR
- Have an Institution for Community Inclusion certification

I am a job coach provider. I do not have an EIN. There are no other employees who work with me or for my business that provide services to students.

Create a combined “Business/Personal” account ONLY.

Create a “Business/Personal” account. Upload your W-9 information and your service provider credentials. Use your SSN or ITIN instead of an EIN. The business will receive direct payment.

Combined Business/Personal Account Requirements:

- Items to complete W-9
 - EIN or SSN or ITIN
 - Bank information
 - Name, as it is registered with the IRS

Eligible job coaches should upload proof with one of the following:

- Hired by the private school as a job coach
OR
- Hired by the public-school system as a job coach
OR
- Meet the criteria/training of the Florida Agency for Persons with Disabilities for job coaches
OR
- Meet the criteria/training of the Florida Association of Rehabilitation Facilities
OR
- Have an Association of Community Rehabilitation Educators (ARCE) certification
OR
- Have an Association of People Supporting Employment First (APSE) certification
OR
- Have an Institution for Community Inclusion certification

I am a job coach who works for a business. I am not a business owner.

Create a “Personal” Account ONLY.

Create a “Personal” account only and upload your service provider credentials. Once you create your account, you will need to request to join your associated “Business” and the “Business” account owner will need to approve/link your “Personal” account to the “Business.” The business will receive direct payment.

Personal Account Requirements:

Eligible job coaches should upload proof with one of the following:

- Hired by the private school as a job coach
OR
- Hired by the public-school system as a job coach
OR
- Meet the criteria/training of the Florida Agency for Persons with Disabilities for job coaches
OR
- Meet the criteria/training of the Florida Association of Rehabilitation Facilities
OR
- Have an Association of Community Rehabilitation Educators (ARCE) certification
OR
- Have an Association of People Supporting Employment First (APSE) certification
OR
- Have an Institution for Community Inclusion certification

Tuition and Fees for an Approved Pre-apprenticeship Program

If you are interested in onboarding as a Pre-Apprenticeship Provider, please complete the [interest form](#).

Tuition and fees for an organized course of instruction designed to prepare a person 16 years of age or older to become an apprentice in a course approved by and registered with the department and sponsored by a registered apprenticeship program under s. [446.052](#).

Tuition and fee schedules must be published and made publicly available.