



CUSTOMER EXPERIENCE



CREATING AMAZING EXPERIENCES WITH EVERY INTERACTION

Special Edition: Office Hours

September 20th, 2023

Paula Nelson, Ed.S., Vice President, CX
Dr. Ronda Dry, Senior Director CX

AGENDA

- Scholarship Updates
- Invoicing Guidance in EMA
- Enrolling Students
- Invoicing Guidance
- Q & A
- Resources



Please note: We cannot answer questions about specific students; however, we can help with general questions you may have about any of the school communications from this week.

2023-24 Scholarship Updates

FES-EO and FTC

Students on Applications: 358,143

Total Students Awarded: 345,607

FES-UA

Students on Applications: 97,652

Total Students Awarded: 79,295

TOTAL STUDENTS AWARDED: 424,902



**Guest Speaker
Senior Director
Enterprise Systems & Reporting**



Tuition/Fees, Funding, Invoicing Guidance

Tuition and Fees:

- A maximum published tuition and fee schedule must be entered for each K-12 grade level
- Verify that the student's grade level is listed accurately before invoicing. If the grade level is incorrect, do not proceed with invoicing that student(s), contact SUFS.
- Scholarship students **CANNOT** be assessed additional fees just because they are scholarship recipients

Incorrect Tuition and Fee Amounts:

- Schools with students with incorrect tuition and fees entered, must unenroll the student(s), select the correct tuition and fee schedule and reenroll the student. It is important for the student withdraw date to be the same as the start date and enter 0 days when making these corrections . Parents will have to go in and reapprove the student's revised tuition and fee schedule.

Funding Concerns:

- We are currently still working through some funding issues due to data clean up from converting to EMA, so you may have students that have not appeared on the billing tab yet. We are actively working to resolve these issues as quickly as possible and will continue to fund these students as these issues are resolved. Please make sure you check your billing tab weekly to process these students.

Tuition/Fees, Funding, Invoicing Guidance

2022-2023 FESUA Remaining Funds:

- You may see amounts on your T&F Invoicing tab that do not agree to your tuition amounts for your enrolled students. Any FES-UA student that had prior year funds remaining and is "enrolled" when we run our process to create school invoices will have an invoice created for the lesser of the two amounts – student account balance or quarterly tuition/fee amount.

For example:

Student is enrolled and has not received funding. Student a has a balance from 22/23 of \$100. Their 23/24 tuition fees are \$2,000. SUFS processes school invoices. An invoice will be created in the amount of \$100 because it is the lesser of the two amounts.

Same student is funded \$2,200 the following week. Student now has a balance of \$2,200. SUFS processes school invoices. The school's Q1 Tuition/Fees that is still due is \$1,900. An invoice will be created for \$1,900 because the lesser of the two is the tuition/fee remaining amount.

Tuition/Fees, Funding, Invoicing Guidance

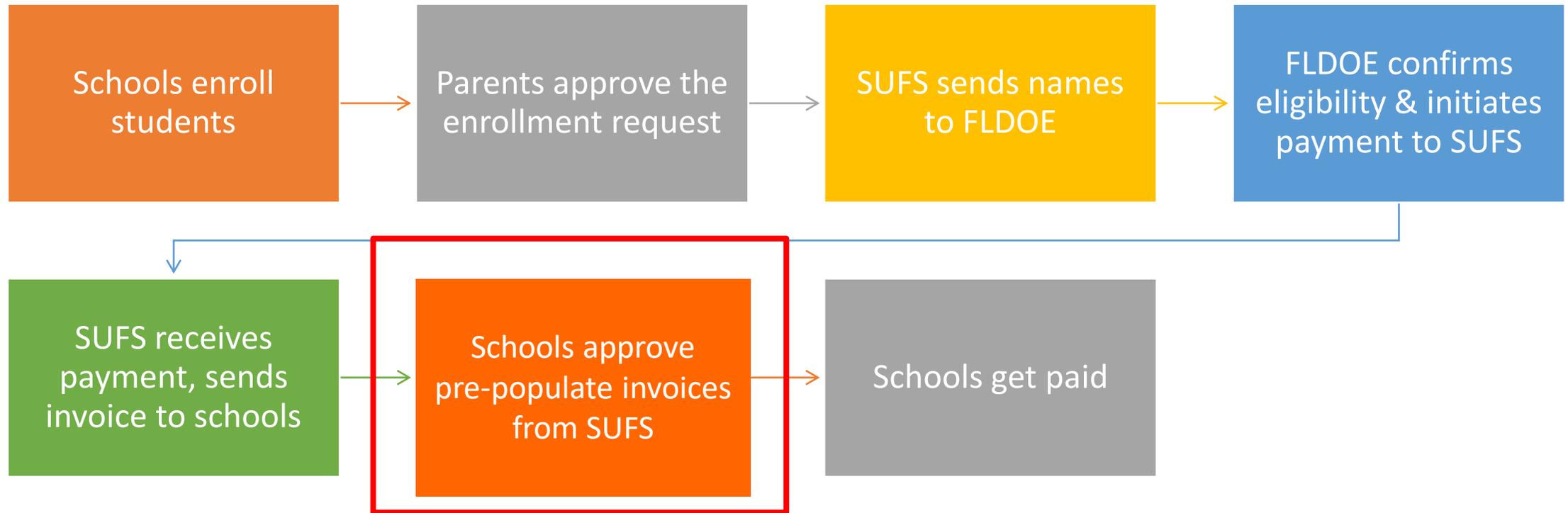
- **Tuition and Fee overpayments**

- In the event a school is overpaid for tuition and fees, SUFS will create a debit memo that will be included with invoice payments.

For example:

Student is enrolled with tuition and fees of \$2,500 and paid under FTC (\$2,000) but is also funded under FESUA(\$2,500). The parent elects the FESUA scholarship. The school will have to withdraw the student which will create an accounts receivable amount due to SUFS. The school reenrolls the student using the FESUA award ID and will be paid the correct amount. When SUFS processes the payment, the school will see an invoice payment amount listed for \$2,500 and a debit of \$2,000, which equals a net payment of \$500.

23-24 School Year Payment Process for SUFS FES-EO and FTC Providers



Check Your Enrollment

Student Enrollment Form

The School Enrollment Form connects the student and their scholarship to the school's invoicing system within EMA. Submitting a School Enrollment Form for a student creates an invoice that will need parent/guardian approval prior to payment.

Please review the student information below. If the student information is accurate, please enter the student's grade for the school year the student will attend your school, the Tuition and Fee Schedule for that particular student, and the start date for the student. All three required values will be autosaved as you enter them. You may include a tuition discount amount if applicable.

If you select the red, 'X' button next to the student's name, the student will be added back to the 'Enrollment Requests' tab. The invoice for that student will not be submitted.

IMPORTANT: Students without all required information entered into the form (grade, Tuition and Fee Schedule, start date) will not be able to be submitted in this tab.

After all the information has been completed for each student and you're ready to send your request for enrollment, select the 'Request' button. You'll have one more chance to review before parents/guardians are notified of the request.

School Year: 2023-2024

STUDENT NAME	AWARD ID	START DATE	GRADE	TUITION/FEE SCHEDULE	ANNUAL TUITION	DISCOUNT	TOT.
Mickey Mouse 98354		mm/dd/yyyy	Select	Select Schedule			

From 1 to 1 of 1

Student Reporting

School Year: 2023-2024

TYPE	TUITION	DISCOUNT	TOTAL	SEF DATE	START DATE	SWF DATE	STATUS
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled
NewRequest							InProgress
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023	08/25/2023	Withdrawn
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled
NewRequest	\$8,050.00		\$8,050.00	08/21/2023	08/14/2023		Enrolled

From 1 to 33 of 33

If you did not receive funding for a particular student or group of students, it is essential to verify whether they are listed on the enrollment form. If they are listed on this tab, it indicates that you have not yet completed the enrollment process for them. To complete the process, you must add the appropriate tuition, discounts, or fees and submit the form. You can also review the reporting tab, where students listed as "in progress" indicate that their enrollment is incomplete.

Invoicing Tuition and Fees: Reporting Statuses

Reporting status definitions

- **In Progress-** The school began the enrollment process but has not assigned them a tuition and fee. **Action Required by school to complete enrollment process**
- **Pending-** Waiting for school to invoice
- **Approved-** School has approved the invoices, waiting to be paid
- **Paid-** School has been paid
- **Deleted-** A student was removed due to a withdrawal form
- **Receivable-** School owes us money, due to a withdrawal after payment



EMA: Invoicing Tuition and Fees

Invoicing Tuition and Fees: Step 1

1

- Under Tuition, click “**ADD**.” The option appears to name the tuition amount. Select the K-12 grade levels associated with the amount and enter the amount. You can enter as many tuition schedules as needed to cover any discounts (multi-student, employee). Later, you will use these tuition schedules and school fees to create maximum and additional tuition & fee schedules.
- You can click on the green check mark to save the line.

Tuition
Please add your school tuition. You will have the ability to enter each grade you serve.

NAME OF TUITION	GRADES	Amount		
pk-2	PK, K, 1, 2	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Fees
Please add your school fees. Examples: L...ation, registration, test fees, etc.

PK 4 9
 K 5 10
 1 6 11
 2 7 12
 3 8

Invoicing Tuition and Fees: Step I cont...

To edit your tuition amounts, click on the blue pen icon. If you want to completely remove a tuition amount, click the red X icon.

Tuition
Please add your school tuition. You will have the ability to enter each grade you serve.

[+ ADD](#)

NAME OF TUITION	GRADES	Amount		
9-12	9, 10, 11, 12	\$5,500.00		
7-8	7, 8	\$4,500.00		
3-6	3, 4, 5, 6	\$3,500.00		



Invoicing Tuition and Fees: Step II:

Fees
Please add your school fees. Examples: Uniforms, books, transportation, registration, test fees, etc.

+ ADD

FEE CATEGORY	NAME OF FEE	Amount	
Select		\$0.00	

Fee Category Dropdown:
Select
Digital Devices and Internet Access
Uniforms
Books
Tutoring
Registration
Other
Capital Campaign
Transportation

Tuition & Fee Schedules
schedule for every grade you serve. IMPORTANT: Once a School Enrollment Form is sent, all locked and unable to be edited until the following school year. Make sure to enter every grade you

2

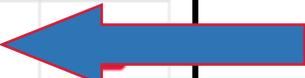
Fees are entered by clicking the **ADD** button and selecting the applicable fee category. You can give the fee a name and add an amount. Once you are done, click on the green check to save.

Invoicing Tuition and Fees: Step II cont...

To edit your fee amounts or details, click on the blue pen icon. If you want to completely remove a fee, click the red X icon.

Fees
Please add your school fees. Examples: Uniforms, books, transportation, registration, test fees, etc.

[+ ADD](#)

FEE CATEGORY	NAME OF FEE	Amount		
Transportation	Transportation	<i>To edit</i> \$100.00		
Registration	All	\$50.00		
Books	High School books	<i>To remove</i> \$250.00		 

Invoicing Tuition and Fees: Step III

3

Enter a maximum tuition and fee schedule for each grade level you serve. Click “Add” and choose the highest tuition amount and all applicable fees for those grade levels.

If you want to completely remove a fee, click the red X icon.

Maximum Published Tuition & Fee Schedules

Please add your maximum tuition and fee schedule for every grade you serve. IMPORTANT: Once a School Enrollment Form is sent, all maximum published tuition schedules are locked and unable to be edited until the following school year. Make sure to enter every grade you serve.

ADD

NAME OF TUITION & FEE SCHEDULE	GRADES	Amount	SEF SUBMITTED?		
PK-2 Max	PK, K, 1, 2	\$2,650.00	N	<input checked="" type="checkbox"/>	
3-6 max	3, 4, 5, 6	\$3,650.00	N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7-8 max	7, 8	\$4,650.00	N	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9-12 max	9, 10, 11, 12	\$5,900.00	N	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional Tuition & Fee Schedules

Please create your tuition and fee schedules. These are the schedules you will use for invoicing. IMPORTANT: Once a School Enrollment Form is sent using a tuition schedule, it will be locked and will not be able to be edited. You can still create new schedules, as long as they do not exceed the maximum published amount for any particular grade. Make sure to enter every grade you serve.

ADD

NAME OF TUITION & FEE SCHEDULE	GRADES	Amount	SEF SUBMITTED?		
--------------------------------	--------	--------	----------------	--	--

IMPORTANT: NO CHANGES WILL BE ALLOWED after tuition and fees have been certified by Step Up and at least one School Enrollment Form has been submitted.

Invoicing Tuition and Fees: Step IV

Under “Additional Tuition and Fee Schedules,” you will be able to create specific tuition and fee groups such as:

- Multiple Student Discount
- Parishioner Discount
- Employee Discount

4

This will save you time during the invoicing process. You can create as many additional schedules as necessary.

Remember you cannot charge additional fees for scholarship students. If you provide a discount for non-scholarship students, you must also apply it to scholarship students.

Additional Tuition & Fee Schedules

Please create your tuition and fee schedules. These are the schedules you will use for invoicing. IMPORTANT: Once a School Enrollment Form is sent using a tuition schedule, it will be locked and will not be able to be edited. You can still create new schedules, as long as they do not exceed the maximum published amount for any particular grade. Make sure to enter every grade you serve.

ADD

NAME OF TUITION & FEE SCHEDULE	GRADES	Amount	SEF SUBMITTED?		
pk-2 low	PK, K, 1, 2	\$2,500.00	N	<input type="checkbox"/>	<input type="checkbox"/>
3-6 low	3, 4, 5, 6	\$3,500.00	N	<input type="checkbox"/>	<input type="checkbox"/>
7-8 low	7, 8	\$4,500.00	N	<input type="checkbox"/>	<input type="checkbox"/>
9-12 low	9, 10, 11, 12	\$5,500.00	N	<input type="checkbox"/>	<input type="checkbox"/>

Add Tuition & Fee Schedule

Name of Tuition and Fee Schedule

Base Tuition

All Grades

- PK
- K
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11
- 12

All Fees

- Transportation (\$100.00)
- All (\$50.00)
- High School books (\$250.00)

Total Amount

CANCEL

SAVE

Invoicing Tuition and Fees: Step IV cont...

To edit additional tuition and fee schedules, click on the blue pen icon. If you want to completely remove a schedule, click the red X icon. You **CAN** add additional schedules **AFTER** you've started enrolling students!

Additional Tuition & Fee Schedules

Please create your tuition and fee schedules. These are the schedules you will use for invoicing. IMPORTANT: Once a School Enrollment Form is sent using a tuition schedule, it will be locked and will not be able to be edited. You can still create new schedules, as long as they do not exceed the maximum published amount for any particular grade. Make sure to enter every grade you serve.

[+ ADD](#)

NAME OF TUITION & FEE SCHEDULE	GRADES	Amount	SEF SUBMITTED?		
pk-2 low	PK, K, 1, 2	\$2,500.00	N		
3-6 low	3, 4, 5, 6	\$3,500.00	N		
7-8 low	7, 8	\$4,500.00	N		
9-12 low	9, 10, 11, 12	\$5,500.00	N		

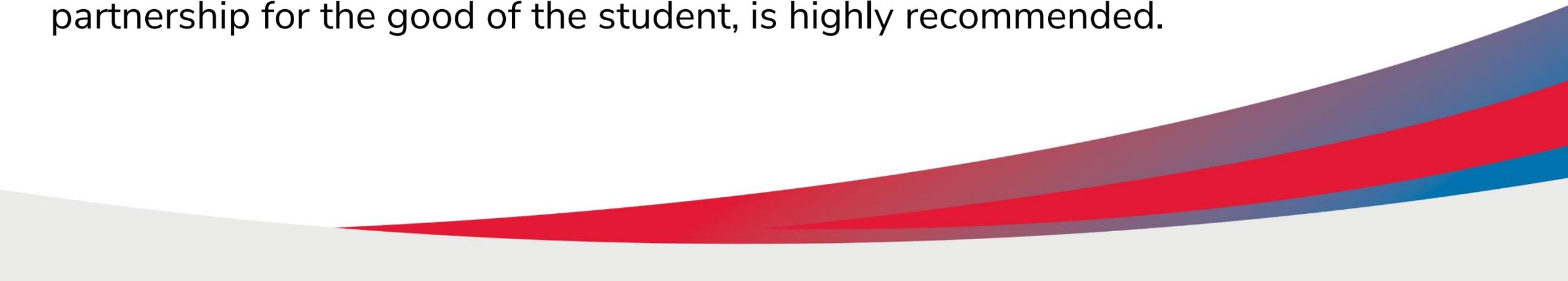
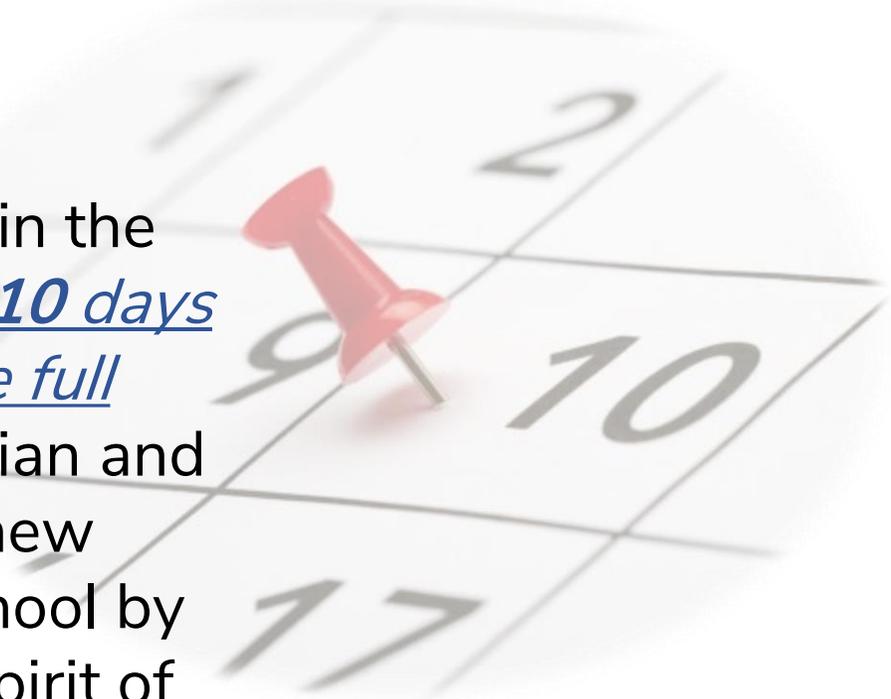
To edit (blue arrow pointing to the blue pen icon)

To delete (red arrow pointing to the red X icon)

Invoicing Tuition and Fees: 10 Day Rule

10 – Day Rule

If a student transfers to a different participating school in the same quarter, the first school the student attended for 10 days or more in the quarterly payment period will receive the full quarter's payment. It is acceptable for the parent/guardian and the two schools to negotiate any amount owed to the new school from the quarterly payment made to the first school by Step Up For Students. This is not required, but, in the spirit of partnership for the good of the student, is highly recommended.



Remittance Reports

Step Up For Students - West Virginia
4655 Salisbury RD STE 400
Jacksonville FL 32256

Phone: 1-877-735-7837
Fax: 904-758-3491

Date: 2/22/2023
Page 1

No: 95 **Remittance Advice**

Payment:

Bank/Remit To: Tipalti Email: [Redacted]

USD

Invoice	Date	Description	Student Name	Net Amount
20002955-1	2/8/2023	20002955-1	[Redacted]	2,307.50
20002955-2	2/8/2023	20002955-2	[Redacted]	1,991.10

Schools will receive two remittances via email. The first remittance, which they receive, is a notification that money is on the way. This notification is from **Tipalti** and does not contain any student details. (Received the day SUFS makes the payment)

The second remittance will come from **Epicor** during the payment posting process. The remittances generated from **Epicor** will include the student's details. (Received approx. 72 hours from when SUFS makes the payment)

Note: Both remittances will be sent from APReports@sufs.org

How to Navigate the Tipalti Remittance Report

1

The schools are receiving an email with a list of payments from Tipalti without details.

<u>Amount</u>	<u>Type</u>	<u>Document number</u>	<u>Document date</u>
USD 1,943.50	Invoice	12789	8/29/2023
USD 1,943.50	Invoice	14136	8/29/2023
USD 1,943.50	Invoice	14137	8/29/2023

2

If they click on the hyperlink, they will see the complete invoice number and amount for each student. However, the student name isn't available on either document. Finance is working on including student names.

Invoice Date: Aug 29, 2023
Month of activity: [%Custom1%]
Invoice Ref: 20001479-1
SAP ID: [%Custom2%]

FROM:
[REDACTED]

United States

TO:
Step Up For Students
P.O. Box 54429
Jacksonville
FL 32245
United States

Item #	Description	Quantity	Unit Price	Tax Code	Tax Amount	Total
	Tuition and Fees					USD 1,943.50
TOTAL						USD 1,943.50

3

The school can compare the invoice number in EMA.

PO #	BUSINESS INVOICE #	PURCHASE DATE	SERVICE TYPE
20001479-1		08/29/2023	Tuition and Fees

STUDENT NAME
[REDACTED]



Service Marketplace: FES-UA Pre-K Tuition and Fees

FES-UA PRE-KINDERGARTEN

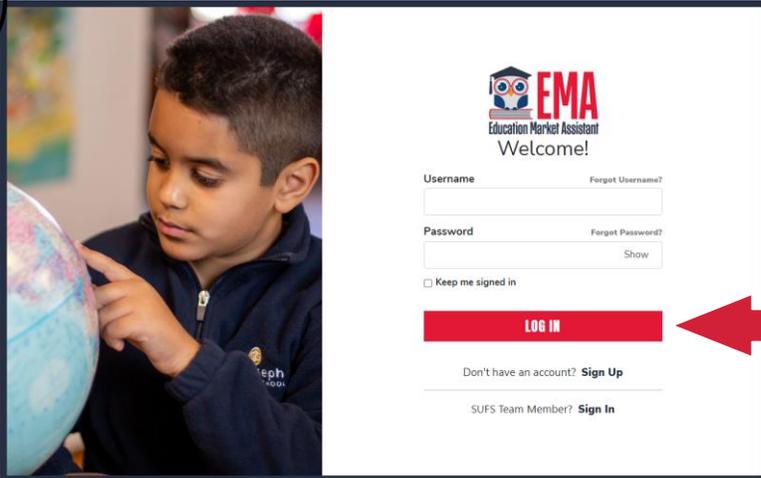
- UA PK students will NOT ever be enrolled on a private school account. Parents can pay out of pocket and ask for reimbursement or tuition can be invoiced through provider marketplace (which will include some school accounts under different tab).
- UA PK students cannot use both VPK voucher and UA scholarships.
- UA PK students can participate in PK4 classes (that may include a PK4 class that accepts VPK program).
- Schools must be approved providers by ELC.

For more information, see the Provider FES-UA Handbook p. 20



FES-UA Pre-K Tuition and Fees

1



The screenshot shows the EMA login page. On the left is a photo of a young boy looking at a globe. On the right is the login form with the following fields and options:

- EMA Education Market Assistant logo and "Welcome!" message.
- Username field with a "Forgot Username?" link.
- Password field with a "Forgot Password?" link and a "Show" button.
- Keep me signed in
- LOG IN** button (highlighted with a red arrow)
- Don't have an account? [Sign Up](#)
- SUFS Team Member? [Sign In](#)

Log into your
EMA account

2



 Business Profile

 Enrollments

 Service Offerings

 Service Providers

 Billing

 Help

Click on Service Offerings in the left dashboard.

FES-UA Pre-K Tuition and Fees

3

The screenshot shows the 'Service Provider Portal' interface. On the left is a navigation menu with items: Business Dashboard, Business Profile, Service Offerings (highlighted), Service Providers, Billing, and Help. The main content area has a 'Service Offerings' tab highlighted with a red box. Below the tab, there is a heading 'Service Offerings' and a note: 'Service offerings are tied to locations. You may enter more than one location; however, each location must be under the same tax ID and bank account for invoicing purposes.' Below this, there are dropdown menus for 'Service Category *' and 'Service Type *', a text input for 'Rate *' (pre-filled with '00000.00'), and another dropdown for 'Per *'. A 'Description' field is also present. At the bottom, there is a 'Locations*' section with a 'Select All' checkbox and several other checkboxes.

4

The screenshot shows the 'Service Offerings' form. The 'Service Category *' dropdown menu is open, displaying a list of categories. The option 'Programs Offered by VPK and School Readiness Providers' is highlighted with a blue background and a red box. Other categories in the list include 'Florida Virtual School (F...)', 'Nationally or Internation...', 'Contracted Public Schoo...', 'Specialized Services (AE)', 'Specialized Services (SL)', 'Specialized Services (OT)', 'Specialized Services (PT)', 'Specialized Services (LSL)', 'Specialized Services', 'Home Education Tuition / Fees', 'Private Full-Time Tutoring Services', 'Standardized Testing Fees', 'Annual Home Education Evaluation Fees', 'Part-Time Tutoring Services', 'Specialized Summer Education Program Fees', and 'Specialized After-School Education Program Fees'. The main form area shows the 'Service Category *' dropdown set to 'Programs Offered by VPK and Sch...', 'Service Type *' set to 'Tuition', 'Rate *' set to '\$700.00', and 'Per *' set to 'Month'.

Click on the Service Offerings tab at the top of the page.

Choose "VPK and School Readiness Providers" under Service Category to enter tuition and fees for school readiness.

FES-UA Pre-K Tuition and Fees

5

Scholarship Portal

Service Offerings

Service offerings are tied to locations. You may enter more than one location; however, each location must be under the same tax ID and bank account for invoicing purposes.

Service Category *
Programs Offered by \

Description
Maximum character count 5

Locations *
Please select the location(s) that will be offering this service.
 Select All

Documentation Upload
Please upload any supporting documentation (Maximum 5 Files).

Service Type *
✓ Select Type
Tuition
Application Fees
Book Fees
Graduation Fees
Enrollment / Registration Fees
Technology Fees
Uniform Fees

Rate *
\$0.00

Per *
Select

Please choose the type of service for which you want to create an offering.

6

Scholarship Portal

Service Category *
Programs Offered by \

Service Type *
Tuition

Rate *
\$480.00

Per *
Month

Description
Maximum character count 150

Locations *

Enter your rate per as indicated above.

FES-UA Pre-K Tuition and Fees

assistant Vivian Jimenez's Zoom Meeting

Scholarship Portal

Service Offerings

Service offerings are tied to locations. You may enter more than one location; however, each location must be under the same tax ID and bank account for invoicing purposes.

Service Category * Programs Offered by \ v

Service Type * Tuition v

Rate * \$0.00

Per *

- √ Select
- Semester
- Hour
- Program
- Fee
- Month
- Week
- Quarter
- Session
- Year
- Activity

Description

Maximum character count 150

Locations *

Please select the location(s) that will be offering this service.

Select All

Primary

Documentation Upload

Please upload any supporting documentation (Maximum 5 Files).



7

Under the **per box**, you have several sections available such as semester, hour, program, and fee

Click the box next to the **location** or select all locations.

Upload any **supporting documentation** needed and click save.

FES-UA Pre-K Tuition and Fees

8

Screenshot of the Scholarship Portal interface showing the 'Service Offerings' section. The page displays a table with the following data:

CATALOG ITEM ID	SERVICE CATEGORY	SERVICE TYPE	RATE	PER	SUBMITTED DATE	STATUS	
20003210	Programs Offered by VPK and School Readiness Providers	Tuition	\$480.00	Month	09/14/2023	Submitted	 

Below the table is a blue button labeled "ADD A SERVICE OFFERING".

Once you have saved the tuition or fee, you will see this screen confirming that the service has been submitted.

To edit the service, use the eye icon and to delete, click the red “X”.

9



Once approved, parents will be able to select these services in the marketplace to start the direct pay process.

YouTube Videos: FES-UA Pre-K Tuition and Fees & Navigating the Service Marketplace for School Providers



FES-UA Pre-K Tuition and Fees



Navigating the Service Marketplace for School Providers



CUSTOMER EXPERIENCE

CREATING AMAZING EXPERIENCES WITH EVERY INTERACTION

Liz Heron
eheron@sufs.org
904.746.0583

Kate Coughlin
kcoughlin@sufs.org
904.746.0584

Ronda Dry
rdry@sufs.org
386.747.5215

Nathan Nadeau
nnadeau@sufs.org
904.746.0588

Step Up for Students Provider Contacts:

1-877-735-7837

enrollment@sufs.org (FTC/FES-EO)

FES-UAprovider@sufs.org (FES-UA)

hopeenrollment@sufs.org (Hope)

Step Up for Students Regional Managers directly serve Florida private schools. Families should contact our Service Center via 1-877-735-7837 or by utilizing our Online Chat at sufs.org.

Melissa Jaramillo
mjaramillo@sufs.org
904.595.6814

Stephanie Love
slove@sufs.org
904.352.2250

Dina Damus
ddamus@sufs.org
904.746.0586

Carla Hernandez
chernandez@sufs.org
904.352.2243

Amy Allman
aallman@sufs.org
813.402.0175

Sacha Walker
swalker@sufs.org
904.352.2247

