



**FAMILY EMPOWERMENT SCHOLARSHIP FOR
STUDENTS WITH UNIQUE ABILITIES
PARENT/GUARDIAN HANDBOOK**



Click on any line within the Table of Contents to go directly to the section.

Table of Contents

Contact Step Up For Students	4
Overview	4
Parent & Guardian Rights & Responsibilities	4
Access To School District Courses & Services.....	4
Data Confidentiality.....	5
Data Security.....	5
Federal Special Education Law.....	5
Maintaining Up-To-Date Contact Information.....	6
Qualifying & Applying For A Scholarship	6
Eligibility Requirements.....	6
Documenting A Child’s Diagnosis.....	7
Applying For A Scholarship.....	8
Multiple Applications Prohibited.....	9
Proof of Residency.....	9
Proof of Residency For Active-Duty Military Families.....	9
Award Prioritization.....	10
Program Capacity.....	10
Program Cap Exceptions.....	10
Application Deadline.....	11
Scholarship Participation Requirements	12
Annual Assessment Requirement.....	13
Leaving The Scholarship Program.....	13
Continuing Program Eligibility.....	13
Placement In Residential Programs.....	14
Funding For Scholarships	14
Scholarship Amounts.....	14



Previous Gardiner & McKay Scholarship Recipients.....	15
Student Matrix Level of Services	15
Scholarship Funding Proration.....	16
Scholarship Funding Schedule.....	16
Funding Continuation & Rollover	17
Accrued Interest.....	17
Account Closure & Fund Revocation.....	17
Transferring Among Scholarship Funding Organizations	17
Authorized Uses of Scholarship Program Funds	18
General Purchasing Rules	19
Making Successful Purchases	19
Pre-Authorization Requests	19
Educational Benefit Form.....	20
Receiving Payments, Refunds, or Rebates	20
Frequency of Purchase Limitations.....	21
Items That Are Lost, Stolen, or Broken Beyond Repair.....	21
Direct Payment For Services	22
Direct Billing For Eligible Private School Enrollment	22
Full-Time Eligible Private School Students	22
Part-Time Eligible Private School Students	23
Individual Classes, Extracurricular Activities, or Services At An Eligible Private School	23
Pre-K Eligible Private School Students.....	24
Transferring Among Participating Schools	24
Direct Payment for College Savings Plans	25
Florida 529 College Savings Plans	25
MyScholarShop	25
MyScholarShop Guidelines.....	25
MyScholarShop Returns.....	26
Status Definitions	26



Submitting Reimbursement Requests	26
Reimbursement Timing	27
Reimbursement Status Definitions	27
Advance Reimbursement	28
Required Supporting Documentation	28
Proof of Payment.....	28
Documenting Eligible Uses of Scholarship Funds	30
Reimbursement Mechanism	37
Appeals.....	38
Actions That May Lead To A Loss of The Scholarship	38
For More Information	39
Contact Information	39
Appendix A	40



Contact Step Up For Students

The Step Up For Students Customer Engagement Center is available Monday through Friday from 8:00 a.m. to 5:00 p.m. EST. Parents and guardians who have questions or need assistance can contact Step Up via chat at StepUpForStudents.org, phone at (877) 735-7837, or [visit the Contact Us page](#) on the Step Up For Students website.

Parents or guardians should be prepared to provide the phone number or email address associated with the account, security question answers, or other details to verify their identity.

Overview

The Family Empowerment Scholarship for Students with Unique Abilities (FES-UA) is a scholarship program that helps parents and guardians customize their student's education.

The student scholarship account functions like a bank account from which a parent or guardian directs funds to pay for tuition and fees for an eligible private school, home education options, therapies, tutoring, and other education-related expenses allowed by law.

Step Up For Students is a nonprofit Scholarship Funding Organization approved by the state of Florida to administer education choice scholarship programs.

This handbook helps parents and guardians understand the rules governing the scholarship program and guides them through the process of applying for and using the FES-UA scholarship.

Parent & Guardian Rights & Responsibilities

Parents and guardians of scholarship recipients are subject to all scholarship program rules and responsibilities, including the annual Sworn Compliance Statement and Terms & Conditions in EMA, relevant statutes, and rules set by the Florida Department of Education.

Parents or guardians of students receiving and using scholarship funds may not take possession of funds at any time and are prohibited from being paid from scholarship funds for services provided to their own scholarship student.

The terms outlined in this handbook are subject to change.

Access To School District Courses & Services

FES-UA scholarship students who do not attend a private school full-time must be provided the same flexibility and opportunities outlined in sections (3)-(12) of [Florida's Home Education statute](#), including access to classes and extracurricular activities offered by their local public schools.

Public schools may not report scholarship students to the state for funding. If a public school reports a scholarship student for public funding, that student may lose their scholarship, even if they only attend the public school on a part-time basis.



Parents and guardians may use their student's scholarship to pay for classes or services provided by public schools.

A scholarship student who pays for services from a public school or district is considered to be attending a public school part time as authorized under Florida Statute [1002.44](#). Please see the [Scholarship Participation Requirements](#) section for more information on public school enrollment.

Data Confidentiality

The information available behind the parent or guardian login in EMA is personal and confidential.

A parent or guardian may not assign responsibility for submitting any application or reimbursement documentation to another user and must not provide anyone, including service providers or personnel at a private school, access to a student's scholarship account by providing a username and password.

Doing so may result in loss of scholarship eligibility and funding, and/or financial or criminal penalties. Step Up For Students will not be responsible for changes or purchases made by anyone other than the account owner if the login information has been shared.

This policy is intended to prevent misuse of scholarship funds and protect the confidentiality of sensitive financial and educational information that belongs to students and their parents or guardians.

Data Security

Step Up For Students will never ask a parent or guardian for the following information via email, phone call, or text message:

- Full account password or any part of it
- Full social security number (Step Up may ask for the last four (4) digits for account verification purposes)
- Credit card number or banking details
- Any personal identification numbers other than the PIN provided on the scholarship application

Parents and guardians who receive any communication requesting this type of information or have received a suspicious email must not respond or click on any links. Instead, they should [report the activity immediately on the Contact Us page](#) on the Step Up For Students website.

Federal Special Education Law

The federal Individuals with Disabilities Education Act (IDEA) provides important procedural safeguards for students with disabilities.

A student participating in the scholarship program has the rights afforded to unilaterally or parentally placed private school or home educated students under the law. School districts are



not obligated to provide that student with a free appropriate public education (FAPE). More details are outlined in [this document from the Florida Department of Education](#).

Scholarship students may be entitled to special education services provided by their local school district under Part B of IDEA. To receive those services, they must have a need identified in a current Individualized Education Plan (IEP) or receive an evaluation from their district.

Parents and guardians may contact their [local school district's special education department](#) or Parentally Privately Placed office for more information on how to request an evaluation and access special education services for a student who does not attend a public school. School districts are not required to evaluate non-public school students, but evaluations completed by a private, licensed provider may be provided to the school district in order to create an IEP and matrix level of services for the student.

Scholarship students have a right to an IEP or matrix level of services developed by their local school district. More information about matrix level evaluations is available in [Revising a Student's Matrix of Services](#).

Maintaining Up-To-Date Contact Information

Parents and guardians should keep contact information current, especially their primary email address. This is the primary way Step Up For Students will communicate important information related to a student's scholarship.

Parents or guardians should update email filters to accept messages from Step Up For Students so emails are not sent to spam or junk folders.

If there is a change of physical or mailing address, telephone number, cell phone number or email address, the information must be updated in EMA. Parents or guardians should contact Step Up For Students to [update their Proof of Residency](#).

Qualifying & Applying For A Scholarship

Eligibility Requirements

The Family Empowerment Scholarship for Students with Unique Abilities is available to students who are:

- Age three (3) or older (with a 3rd birthday on or before December 31 of the year their parent or guardian applies for a scholarship) or eligible to enroll in a Florida public school (if applicable for their age);
- Less than twenty-two (22) years old;
- Florida residents, or dependent children of active-duty members of the United States Armed Forces who have received Permanent Change of Station (PCS) orders to Florida or renewing students whose home record or state of legal residence is Florida and have received PCS orders outside of Florida; **and**
- Diagnosed with one of the following conditions:



- [Anaphylaxis](#)
- [Autism Spectrum Disorder](#)
- [Cerebral Palsy](#)
- [Down Syndrome](#)
- [Emotional or Behavioral Disability](#)
- [Hearing Impairment, including deafness](#)
- [High-Risk Child](#)
- [Hospital or Homebound](#)
- [Identification as Dual Sensory Impaired](#)
- [Intellectual Disability \(severe cognitive impairment\)](#)
- [Language Impairment](#)
- [Muscular Dystrophy](#)
- [Orthopedic Impairment](#)
- [Other Health Impairment](#)
- [Phelan-McDermid Syndrome](#)
- [Prader-Willi Syndrome](#)
- [Rare Diseases \(defined by NORD\)](#)
- [Specific Learning Disability](#)
- [Speech Impairment](#)
- [Spina Bifida](#)
- [Traumatic Brain Injury](#)
- [Visual Impairment, including blindness](#)
- [Williams Syndrome](#)

Detailed definitions are available by clicking a specific diagnosis listed above or in [Appendix A](#) at the end of this document.

A parent or guardian may share the list of qualifying diagnoses with a medical or mental health professional before applying to understand if their child meets the requirements.

Misrepresenting any information provided to Step Up For Students in a scholarship application could result in the revocation of the student's scholarship and may be punishable as a crime.

Please note: Active-duty members of the United States Armed Forces who do not have a Florida residential address at the time of application but have received Permanent Change of Station (PCS) orders must provide a copy of their PCS orders in the application documents and list the Florida address of the unit to which they are being assigned or from which they are being relieved.

Documenting A Child's Diagnosis

A student may qualify for the scholarship with an Individualized Education Plan (IEP) identifying one of the conditions above, approved by their school district within the past three years, in



accordance with the rules of the Florida Board of Education or the rules of another state OR a diagnosis validated by one of the following medical or mental health professionals:

- Physician licensed in Florida or another state or territory of the United States (including the District of Columbia or Puerto Rico).
- Florida-licensed Autonomous Advanced Practice Registered Nurse
- Florida-licensed psychologist

Parents and guardians usually only need to document a child's diagnosis the first year they apply for a scholarship, except for students who qualify as High-Risk, Dual Sensory Impaired, or Hospital or Homebound.

Parents and guardians of students who initially qualify under the High-Risk designation must provide documentation of eligibility for the student, under one of the other diagnoses outlined above, if the student will turn six (6) years old on or before September 1 of the school year they apply.

A current IEP is required to demonstrate a dual sensory impaired or a Hospital or Homebound diagnosis, and Hospital or Homebound IEPs must be updated each year.

In general, birth certificates are only needed for new students between the ages of three (3) and six (6). However, once the student ages out of the high-risk category at age six (6), they will be considered a new student when the new diagnosis is submitted with the application. These students will be asked for a birth certificate.

Applying For A Scholarship

Step Up For Students requires parents and guardians to submit a complete scholarship application each year through their EMA account, which can be accessed at StepUpForStudents.org.

EMA, the Education Market Assistant, is the system Step Up For Students created to help parents and guardians manage every aspect of their student's scholarship, starting with the online scholarship application.

[This video](#) and [this guide](#) explain how to create a parent or guardian account in EMA. Using their login, parents and guardians can [complete an online application](#) and submit documentation required to confirm the student's age, diagnosis, Florida residency, and compliance with program rules.

[This guide](#) explains how to complete an application and [this checklist](#) outlines the documents a parent or guardian should prepare when they apply.

A parent or guardian must use their phone number, physical address, and email address, and no one else's, in their guardian profile.



A participating school or provider may not apply on behalf of a parent or guardian, submit documentation, or otherwise act on behalf of the parent or guardian. Schools or providers must not request access to or obtain the parent's or guardian's information to access the student's scholarship account. Doing so may result in revocation of the provider's participation in the program or the student's scholarship eligibility and funding and may carry a financial or criminal penalty.

Students who will not enroll in a private school must file a letter of intent to be educated in a home education program with their school district.

Multiple Applications Prohibited

Scholarship program statutes prohibit a student from applying for more than one scholarship for the same student at the same time.

If a parent or guardian applies for both FES-UA and a Florida Tax Credit (FTC) Scholarship or Family Empowerment Scholarship for Educational Options (FES-EO) for the same student, that student will remain on the FES-UA scholarship.

If a student attends an eligible private school, parents and guardians should communicate with their child's school before changing scholarship programs to confirm which scholarships their school accepts.

A parent or guardian may only submit one application per scholarship program. Parents or guardians should make sure all students for whom they wish to apply are added to the My Students section in EMA before submitting their application.

A scholarship student may only be associated with one parent or guardian profile. If a student has multiple parents or guardians and appears on multiple scholarship accounts, there may be a delay in the student's scholarship processing or funding. If a current scholarship student's guardianship is updated, their parent or guardian must contact Step Up to update this information.

Proof of Residency

The applying parents and guardian must prove they are a resident of Florida to be eligible for an FES-UA scholarship.

[This checklist](#) outlines documents that can serve as proof of residency.

Proof of Residency For Active-Duty Military Families

Students who are dependent children of active-duty members of the United States Armed Forces with Permanent Change of Station (PCS) orders to move into or current scholarship students under orders to move out of Florida can apply for an FES-UA scholarship.

If a new student is moving to Florida, but has not yet established residency, the parent or guardian should:



1. Upload the PCS orders in the Proof of Residency section of the scholarship application.
2. Be sure the physical address in their guardian profile matches the newly assigned unit address on the PCS orders they submit.
3. Once residency in Florida is established, call Step Up For Students at (877) 735-7837 to provide an updated Proof of Residency.

Note: Students will not receive funds until an updated Proof of Residency is received and the physical address is updated in the guardian profile in EMA.

If a renewal student is moving out of Florida, the parent or guardian should use the physical address of the unit from which they are relieved on the PCS orders in their guardian profile and:

1. Upload a Leave and Earnings Statement, IRS Domicile 2058 or DFAS Form 702 in the Student Information section of the scholarship application.
2. Upload the PCS orders in the Proof of Residency section of the scholarship application.

Award Prioritization

Scholarship applications will be reviewed on a first-come, first-served basis. Scholarships will be awarded in this order of priority:

1. **Renewal students:** Students who received an FES-UA scholarship during the 2024-25 school year.
2. **New students:** Students who did not receive an FES-UA scholarship during the 2024-25 school year, or who declined a scholarship during the 2024-25 school year.

Program Capacity

The number of applications received by Step Up For Students may exceed program capacity.

Florida statutes limit the number of scholarships available each school year. Step Up For Students strongly encourages parents and guardians to submit an application and any required supporting documents as soon as possible.

If program capacity allows, students will receive scholarships on a first-come, first-served basis.

Parents and guardians will receive an email notification regarding their student's updated application status.

Program Cap Exceptions

The following categories of students are not included in the total scholarship capacity and may receive scholarships even if the program exceeds capacity. If an applicant indicates an exception that requires additional documentation, a prompt will appear to provide it.

- Dependents of a law enforcement officer as defined in s. [943.10\(1\)](#), F.S. or an active-duty member of the United States Armed Forces. Applicants can document their exclusion with:



- A photocopy of the law enforcement officer's badge
- The Service Member's Leave and Earnings Statement for the month the application was submitted.
- Foster child. Applicants can document their exception with a copy of the Foster Placement documentation, or other similar legal documentation.
- Adopted child. Applicants can document their exception with a copy of an Adoption Decree, or other similar legal documentation.
- Students who received specialized instructional services under the Voluntary Prekindergarten Education Program described in s. [1002.66](#), F.S. during the previous school year and have a current Individualized Education Plan (IEP) developed by the district school board in accordance with rules of the State Board of Education.
- Students who spent the prior school year in attendance at a Florida public school or the Florida School for the Deaf and the Blind.
- Students who received a John M. McKay Scholarship for Students with Disabilities in the 2021-22 school year.

Students who are excluded from the annual statutory cap may experience temporary application processing holds while their cap exception is verified.

Application Deadline

For renewal students, the last day to submit a scholarship application for the 2025-26 school year is April 30, 2025. This process for renewal students also requires parents to confirm the scholarship is being accepted or declined by May 31, 2025.

For new students, the last day to submit a scholarship application for the 2025-26 school year will be November 15, 2025. This process for new students also requires that parents then confirm that the scholarship is being accepted or declined by December 15, 2025.

Applications may close earlier if the program reaches its full capacity before these dates. When applications reach capacity, parents and guardians will be able to register for a program interest list to receive notifications if more applications become available. Any applications submitted after the renewal application deadline will be treated as new applications.



Scholarship Participation Requirements

Once awarded a scholarship, the parent or guardian can access their student's Award ID by logging in to EMA, [as outlined in this video](#).

A student must enroll in one of the following programs that meets regular school attendance requirements:

- An eligible private school
- A home education program registered with their local school district

****IMPORTANT****

Students awarded an FES-UA scholarship may not enroll in any public school, full-time or part-time, that reports them to the State for funding. Students who do so will lose their scholarship, unless the parent or guardian pays for those classes or services. Parents and guardians may use their student's scholarship to pay for classes or services provided by public schools, and some public school districts are available in EMA as direct pay providers.

Parents and guardians of scholarship students who participate in classes at a public school must double-check with the school or district to ensure they are not being reported to the state for funding purposes.

Florida public schools include:

- A charter school**
- A developmental research or laboratory school**
- Florida Virtual School or any other online public school as a non-private-pay student**
- The SEED School of Miami**
- The College-Preparatory Boarding Academy**
- The Florida Scholars Academy**
- The Florida School For Competitive Academics**
- The Florida School For The Deaf and The Blind**
- Any other Florida public school**

Students may not receive multiple K-12 scholarships under the FES-UA, FES-EO, FTC, or PEP scholarship programs at the same time.

More information for students who want to leave their current scholarship program for another option is available below under [Leaving the Scholarship Program](#).

Students may use the FES-UA scholarship and the Voluntary Prekindergarten (VPK) Education Program at an eligible private school at the same time. They may not use an FES-UA scholarship and VPK's Specialized Instructional Services (VPK-SIS) at the same time.



Annual Assessment Requirement

Students in grades 3-10 attending an eligible private school using scholarship funds are required to take a [standardized assessment approved by the Florida Department of Education](#).

More information, including a list of approved assessments, is [available from the department here](#).

Students with disabilities for whom standardized testing is not appropriate are exempt from this requirement. These students must submit the [Test Exempt Form](#).

Leaving The Scholarship Program

Parents or guardians must notify Step Up For Students immediately if a scholarship student:

- Enrolls, and is reported to the state for public funding, in any public school, including Florida Virtual School or another online school. (Students may use their scholarships to pay for courses or other services provided by these institutions.)
- Intends to apply for the Florida Tax Credit Scholarship, the Family Empowerment Scholarship for Education Options, a Personalized Education Program (PEP) scholarship, the Transportation Stipend, or New Worlds Scholarship Accounts program.
- Receives Specialized Instructional Services under the Voluntary Prekindergarten Education Program described in s. 1002.66, F.S.
- Moves out of state (except for renewing students of active-duty members of the United States Armed Forces who receive permanent change of station orders out of state while maintaining legal residence in Florida).

Failure to notify Step Up For Students could result in a loss of funding, loss of future eligibility, and financial or criminal penalties.

If state records show a student enrolled in a public school after receiving scholarship funds, the funds deposited into the student's account for that school year will be returned to the state of Florida.

If a student is found enrolled in public school or another scholarship program, their parent or guardian will be notified by email and should contact Step Up For Students immediately.

Continuing Program Eligibility

Once a student's scholarship has been funded, a parent or guardian may continue with the scholarship as long as they meet residency requirements and remain eligible to enroll in a Florida public school. The student will remain eligible until they return to public school, graduate high school, or turn twenty-two (22) years old. If a student graduates high school before the end of the school year, the parent or guardian must [contact Step Up For Students](#). Failure to do so may be considered fraud and may result in financial or criminal penalties.



Renewal students do not have to requalify for the scholarship unless their qualifying disability status changes.

A student will need to apply for the scholarship as a new student if they:

- Do not renew their scholarship and “sit out” a year.
- Leave the program and later seek to resume participation.

If a student turns twenty-two (22) years old, graduates high school, or enrolls in a public school on a full-time basis but still has funds remaining in their scholarship account, the parent or guardian may continue to access and spend those funds on eligible expenses until no funds remain in the scholarship account. **Accounts will be closed after two years without any spending activity or any period of three (3) consecutive years after high school completion during which the student has not been enrolled in an eligible postsecondary educational institution or a program offered by the institution.**

Placement In Residential Programs

If a scholarship student is placed in any residential program, the parent or guardian must confirm how participating students meet the mandatory school attendance requirement.

- If the program uses any Florida public school, including a full-time online school, the student may lose their scholarship eligibility if the online school reports them to the state for funding.
- If the program includes a private school that is approved by the Florida Department of Education to participate in scholarship programs, the student's scholarship funds may be available to cover the cost of tuition and fees.

Funding For Scholarships

Scholarship Amounts

The amount of funding a student receives for their FES-UA scholarship is based on three factors:

- A student's grade level
- The county where they live
- The level of special education services they receive

Florida students with Individualized Education Plans (IEPs) are assigned a matrix level of 1-5 (251-255), based on the support they would receive in a public school.

Students assigned matrix levels of 1, 2, or 3 (251-253), or who qualify for the scholarship using a diagnosis by a medical or mental health professional, receive scholarship funding based on average per-student special education funding in their local school district.

Students assigned matrix levels of 4 or 5 (254 or 255) receive greater funding amounts.

Scholarship funding amounts for the 2024-25 school year are broken down by grade level, county, and matrix score and are [available here](#).



A student's matrix level of services must be developed by a school district and submitted to the Florida Department of Education. Step Up For Students is not involved in the development of matrix scores but will be notified of any updates by the department. More information is available below under [Revising a Student's Matrix of Services](#).

Previous Gardiner & McKay Scholarship Recipients

Scholarship funding for a student who used a Gardiner or McKay Scholarship in the 2020-21 school year will be the amount the student received for the 2020-21 school year or the [amount calculated according to the 2024-25 funding chart](#), whichever is greater.

For students whose funding is based on a scholarship they received during the 2020-21 school year, the Award Details in EMA may not reflect their actual funding amount. They may incorrectly show the amount the student would have received if their scholarship was funded for the first time during the 2024-25 school year.

These parents or guardians may confirm their student's actual funding amount by multiplying their student's quarterly funding by four.

Student Matrix Level of Services

A parent or guardian of a student with a disability who does not have an Individualized Education Program (IEP) or who would like a re-evaluation of an existing IEP may choose to request an evaluation from their local school district.

This evaluation can lead to changes in a student's matrix of services, which could result in an adjustment of that student's scholarship funding. The amount may be adjusted up or down.

A parent or guardian whose child does not have an IEP may request an initial evaluation at any time. Subsequently, an IEP re-evaluation is available once every three years.

To seek an evaluation or re-evaluation from the student's school district, a parent or guardian may contact the local school district to schedule the evaluation or matrix review as described in Florida Statute 1002.394(7)(b):

- The school district is required to complete the IEP and matrix of services within thirty (30) days after receiving notice of the parent or guardian's request
- The school district will complete the evaluation and matrix review and notify the parent or guardian and the Florida Department of Education of the student's updated matrix level within ten (10) calendar days after its completion
- The department will send a notification to Step Up For Students and the parent or guardian within ten (10) days after receiving the school district's notification of the matrix level
- A school district may change a matrix of services only if the change is a result of an IEP reevaluation or to correct a technical, typographical, or calculation error
- Step Up For Students will update the matrix level on the student's account, and, if applicable, the amount of scholarship funding, for the quarterly funding period after it



receives notification from the department. Funding the student received before the update will not be adjusted to reflect a higher or lower matrix score.

It may take time before these updates are fully reflected in EMA.

Step Up For Students does not participate in the IEP evaluation or matrix review process.

Scholarship Funding Proration

The amount of funding a student receives is prorated based on the date they are awarded a scholarship.

- Students awarded a scholarship by October 25, 2025, will receive 100% of the total award amount for that school year.
- Students awarded a scholarship by January 25, 2026, will receive 50% of the total award amount for that school year.

If a scholarship is not awarded by January 25th, it will not be funded in the 2025-26 school year.

Scholarship Funding Schedule

Scholarship funds are deposited into students' scholarship accounts quarterly.

Step Up For Students will receive regular quarterly funding from the state by the following dates:

- Quarter 1: August 1 (renewal students – students who were funded in the
2024-25 school year)
September 1 (new students – students funded for the first time in the
2025-26 school year)
- Quarter 2: November 1
- Quarter 3: February 1
- Quarter 4: April 1

Funds will be deposited into the student's account within two weeks after Step Up For Students receives funds from the state.

The above dates are the regularly scheduled funding distributions for the FES-UA scholarship program. Students who miss a regularly scheduled distribution may receive supplemental funding.

If Step Up For Students deposits excess funds in error to a student's scholarship account, Step Up will recover the excess funds by potentially adjusting future funding amounts. Parents and guardians should be aware of the amount of funds in the student's scholarship account when making purchases and try to avoid spending any funds that may have been deposited into the student's account by mistake. If a student switches scholarship programs mid-year, Step Up may need to recover excess funds tied to their previous scholarship program.



Funding Continuation & Rollover

Once funds are deposited into the student's account, parents or guardians may use the funds for items and services described in the sections below.

A student's unspent scholarship funds may be rolled over from one school year to the next. However, under Florida law, Step Up For Students cannot transfer funds into the student's scholarship account that would raise the balance above \$50,000.

If a student returns to public school, graduates from high school, or reaches twenty-two (22) years of age on or before July 1 (whichever comes first), the student will not be eligible for additional scholarship funding. Funds received while a student is eligible for the program will remain in their account in EMA.

Accrued Interest

Florida law requires Step Up to establish separate scholarship accounts for each scholarship student. It also requires us to record interest accrued on each student's account and make sure any interest is reserved for that student's benefit. This means accrued interest counts toward each student's scholarship funds.

Account Closure & Fund Revocation

A student's scholarship account must be closed and any remaining funds, including any contributions made to the Stanley G. Tate Florida Prepaid College Savings Program or to the Florida College Savings Program (529), will be returned to the state after:

- Denial or revocation of program eligibility by the commissioner for fraud or abuse,
- Any period of three consecutive years after high school completion or graduation during which the student has not been enrolled in an eligible postsecondary educational institution or a program offered by the institution.
- Any period of two consecutive fiscal years (July 1 – June 30) with no spending activity.

Transferring Among Scholarship Funding Organizations

Students may only have a scholarship funded by one Scholarship Funding Organization (SFO) at a time. If a student wants to transfer from one SFO to another, they must follow these steps:

Step 1: Has the student already applied for a scholarship with an SFO other than Step Up For Students?

- If yes, proceed to Step 2
- If no, they may apply for a scholarship at any SFO

Step 2: Has the student already been awarded a scholarship or received funding from an SFO other than Step Up For Students?

- If yes, proceed to Step 3
- If no, the student must decline the scholarship before applying with Step Up For Students



Step 3: Has the student submitted a new, completed application to Step Up For Students and been found eligible for a scholarship?

- If yes, the student must contact their current SFO to initiate a scholarship transfer
- If no, the student must apply for a scholarship with Step Up For Students and be found eligible before initiating the scholarship transfer process

A parent or guardian of a student with a scholarship currently funded by Step Up For Students should contact Step Up if they want to request a transfer to another SFO. Step Up For Students will work with the other SFO to begin the transfer process.

Transferring funds may take several weeks to complete.

Authorized Uses of Scholarship Program Funds

Scholarship program funds must be used for eligible expenses that meet the individual educational needs of the scholarship student.

Products or services paid for by another agency or source (for example, health insurance, Healthcare Savings Accounts (HSAs), or a School Readiness program) may not be submitted for reimbursement.

Please see the appendix at the end of this handbook for a chart outlining the Authorized Uses of Funds and payment types (direct pay or reimbursement) for each program. Eligible expenses are detailed in the program [Purchasing Guide](#).

The following categories of items and services are approved uses for the scholarship funds:

- Instructional materials
- Curriculum and curriculum materials
- Specialized services
- Tuition and fees:
 - At an eligible private school
 - For home education instructional programs*
 - At an eligible post-secondary institution
 - At an [FLDOE approved pre-apprenticeship program](#)
 - For a dual enrollment program that is creditable toward high school completion and a career certificate or an associate or baccalaureate degree under [Florida Statute 1007.271](#). [More information is available from the Florida Department of Education](#).
- For a private tutoring program
- For part-time tutoring services or Choice Navigator services
- At an approved online or virtual provider
- As a private pay student for Florida Virtual School (FLVS)
- Standardized testing fees, including test administration and proctoring
- Contributions to approved college savings programs
- Stanley G. Tate Florida Prepaid College Program



- Florida 529 Savings Program
- Contracted services provided by a public school or school district
- Fees for specialized summer education programs
- Fees for specialized after-school education programs
- Transition services provided by job coaches
- Annual home education evaluation fees
- Tuition and fees for an approved VPK Program provider, an approved School Readiness provider, or an eligible private school
- Fees for horse therapy
- Fees for music and art therapy

Reimbursement requests submitted for an item or service not listed as an eligible expense may result in delayed processing or denial of the reimbursement if the request does not include an approved pre-authorization. More information is available below under [Pre-Authorization](#).

*Note: For purposes of the scholarship program, a home education instructional program as an authorized use of funds is different than a home education program as defined in Florida Statute 1002.01(1).

General Purchasing Rules

Making Successful Purchases

Before making purchases out-of-pocket, submitting reimbursement requests, or ordering through MyScholarShop, parents and guardians should check to ensure:

1. The purchase is an eligible use of scholarship funds. (Note: If a purchase was previously approved due to error, under another program, or under a previous year's rules, that does not mean it will be approved in the future).
2. The student has sufficient funds in their account to cover the purchase.

The parent or guardian may view their account balance on the online statement provided in EMA. A family cannot receive reimbursements for amounts that exceed the available balance in the student's account.

Step Up For Students approves purchases and reimbursement requests in accordance with Florida statutes related to the scholarship program, rules set by the Florida Department of Education, and internal policies and procedures.

Pre-Authorization Requests

Pre-authorization requests can be submitted for expenses planned in the future. Once a request is approved, it can be used to submit a reimbursement or to make a MyScholarShop purchase. (Note: the New Worlds Scholarship Accounts program does not allow reimbursements.)

Payment method information must be kept up to date in EMA to complete a pre-authorization.



Include detailed information about the item or service requested for pre-authorization, along with any supporting documents for the purchase.

Complete the Educational Benefit Form, including:

- **Student Name:** As it appears in the student's scholarship account.
- **Student ID Number:** In EMA under the "My Student" tab in the Student Profile.
- **Item for Reimbursement:** Specify the item to be reimbursed.
- **Educational Benefit:** Describe how this item will benefit the student's education.
- **Acknowledgement:** Read the acknowledgment statement and check the box to agree to the statement.
- **Parent/Guardian Name:** Print the parent or guardian's name.
- **Signature:** Sign the parent or guardian's name.
- **Submit:** Press submit to complete.

If the pre-authorization request is approved, the item or service on the proof of purchase must match the approved pre-authorization; otherwise, the request may be denied.

If the pre-authorization request is put on hold, log into EMA to see the reason why it was put on hold, provide the required information or documentation, and re-submit the pre-authorization request.

If the pre-authorization request is denied, the reason for the denial will be listed in EMA. Denied pre-authorization requests may not be appealed, so no further action may be taken.

The status of pre-authorization requests can be monitored in EMA.

Educational Benefit Form

Some purchases require documentation of their educational benefit. This must be done through the Educational Benefit Form, [which is available here](#). Details about which purchases require the educational benefit form are available in the [purchasing guide](#).

Educational benefit is defined as supporting and advancing student learning. To be approved, an educational benefit form should clearly explain how the purchase will help the student learn.

Fields in EMA may ask for parents to provide information on the educational benefit of a purchase, but filling out these fields does not replace the need to fill out the [Educational Benefit Form](#).

In addition to educational benefit, Step Up For Students may consider the manufacturer's recommended minimum age to approve purchases or reimbursement requests, primarily for student safety purposes.

Receiving Payments, Refunds, or Rebates

Parents or guardians may not receive a payment, refund, or rebate of scholarship funds from a provider.



If a school, service provider or vendor issues payment, refund, or rebate to a parent or guardian, the funds must be returned to the student's scholarship account.

Parents and guardians may not keep the proceeds from selling an item purchased using scholarship funds. Proceeds of the sale must be returned to the student's scholarship account.

A check, made payable to Step Up For Students, indicating the scholarship student's name and student ID, should be sent to Step Up For Students at the following address:

Step Up For Students
Attention: Accounts Receivable
P.O. Box 54429
Jacksonville, FL 32245-4367

If the funds are not returned to the student's scholarship account, the student could lose scholarship funding and eligibility for violating program rules.

Frequency of Purchase Limitations

Program rules limit the frequency with which families can purchase certain items using scholarship funds.

These rules apply by calendar year. For example, a laptop may have a two-year purchasing frequency, meaning a student who purchased a laptop on November 10, 2024, will be eligible to purchase another laptop using scholarship funds on or after November 11, 2026.

Frequency of purchase rules apply to all scholarship programs, even if a student changes programs. For example, if a parent/guardian purchased a tablet with New Worlds Scholarship Accounts funds on November 10, 2024, so the student would not be eligible to purchase a tablet using any other scholarship until November 11, 2026.

More details are available in the program [Purchasing Guide](#).

Items That Are Lost, Stolen, or Broken Beyond Repair

If an item purchased with scholarship funds is broken beyond repair, it may be replaced with a similar item of equal or lesser value.

A parent or guardian must submit a pre-authorization request and documentation from a repair shop or service technician showing the item is beyond repair. Photos of the damaged item do not qualify as sufficient documentation.

If the item can be repaired, scholarship funds may be used to cover the cost of repair, but they cannot be used to cover the cost of a replacement.

If an item was stolen, a parent or guardian must submit a pre-authorization request and police report for review.

Replacement of lost items will not be approved.



If a replacement item is authorized, the two (2) calendar-year period will reset. For example, a student who purchased a laptop on July 10, 2024, but then is authorized to purchase and purchases a replacement device on October 10, 2025, will not be eligible to purchase another laptop using scholarship funds until on or after October 11, 2027.

Direct Payment For Services

Step Up For Students allows parents and guardians to pay directly for some eligible educational services. Providers wishing to participate in direct payment for educational services from scholarship students must set up a provider account in EMA and submit a service catalog.

Students will utilize direct provider billing through the EMA Marketplace.

Requests for payment directly to a provider may only be approved after the service has been rendered.

Direct Billing For Eligible Private School Enrollment

Full-Time Eligible Private School Students

For the 2024-25 school year, a parent or guardian may enroll their student in an FES-UA participating private school in EMA. Enrollment through EMA is for scholarship students who will be educated full-time, in-person at the school's physical location. A list of schools eligible to serve scholarship students can be found in the [Florida Private Schools Directory](#).

Enrollment in EMA is optional for FES-UA students and will allow schools to invoice scholarship funds directly from students' accounts quarterly. Payments will be made to schools within seven (7) business days after both the school and the parent or guardian approves the invoice in EMA from the private school.

If a student attends their school for at least 10 days during a quarterly payment period, their school will receive the full distribution for that quarter.

Schools participating in the scholarship program cannot charge a different rate for scholarship students and non-scholarship students. The same published tuition schedule must apply to all students, whether on scholarship or paying privately.

Step Up For Students commits the total amount of tuition and fees, up to the amount of funding a student was awarded that school year, to the selected school. Step Up bills the student's account quarterly for tuition and fees before a parent or guardian can access any remaining scholarship funds.

When a student enrolls in an eligible private school, the school and parent or guardian must both certify the agreed-upon tuition and fee rate for the student. The agreed-upon tuition and fee rate for the student may include discounts or other considerations. The rate can be less, but not more than the school's published tuition and fee rate for the student's grade level.



The agreed-upon tuition and fee rate for a student in EMA should not exceed any amount the parent or guardian has agreed to pay the eligible private school.

For example: If a school and a parent agree to a tuition and fee rate of \$10,000, the amount charged in EMA should be \$10,000 or less.

Many private schools charge more than the value of the scholarship. In some cases, they may decide to provide scholarship students with supplemental financial assistance at their own discretion. The parent or guardian should work with the school but may be required to pay the difference between the value of the scholarship and the full tuition and fees.

If a school charges more than a student's scholarship amount for tuition and fees, families may pay for the difference using rollover funds in their account. To be paid directly from scholarship funds, the school must set up a tuition and fees service offering in EMA. A video with details on how schools can navigate the EMA Marketplace is [available here](#).

Part-Time Eligible Private School Students

Students may enroll part-time in eligible private schools they attend in-person. Eligible private schools may accept direct payment by creating service offerings in the EMA Marketplace.

A list of schools eligible to serve scholarship students can be found in the [Florida Private Schools Directory](#).

Part-time students may not utilize the school enrollment function in EMA, which is for full-time, in-person learners only. Tuition and fees at hybrid schools, where students spend two or more days learning in-person and the rest at home, are not approved uses of FES-UA funds.

Individual Classes, Extracurricular Activities, or Services At An Eligible Private School

Students enrolled full-time at an eligible private school may use any scholarship funds remaining after paying for full-time tuition and fees to take individual classes or participate in extracurricular activities at a different eligible private school.

Students who wish to do so must not enroll in multiple private schools as a full-time student.

Each class or activity must be paid for through the school's EMA marketplace account or by reimbursement.

Eligible expenses include academic services, athletics, clubs, activities, individual classes, and testing.

Payments made to a private school that is not approved by the Florida Department of Education to participate in a student's scholarship program cannot be reimbursed.



Pre-K Eligible Private School Students

Beginning the 2024-25 school year, eligible students with an FES-UA scholarship can use EMA to enroll in pre-K programs offered by an eligible, FES-UA participating private school by following these steps:

1. The school must have or create an account in EMA.
2. The parent or guardian must provide their student's scholarship Award ID to the school.
3. Once a school enrolls the student, the parent or guardian will receive an email prompting them to log in to EMA to review and approve the enrollment.

A student can only enroll in a private school with an active EMA account.

Pre-K students have the flexibility to enroll full-time or part-time through EMA for in-person learning. Payments will be made to schools within seven (7) business days after the parent approves the invoice from the private school in EMA.

Transferring Among Participating Schools

Enrollment in an eligible private school in EMA is not required for FES-UA scholarship students. Students who do enroll in private schools may transfer their scholarships between participating private schools. If a parent or guardian is not satisfied with the private school they have chosen, they may find another one.

Before a parent or guardian withdraws their student from the private school, they should notify the school and understand the school's transfer policy.

A student may not be enrolled in a new eligible private school in EMA until the student has been withdrawn from the prior school in EMA.

The transfer process may include a final payment to the private school the student is leaving. If a payment is owed to that school, it must be approved by the parent or guardian. If the school has been overpaid, Step Up will invoice the school for the overpayment.

If a student transfers to a different participating school in the same quarter, the first school the student attended for ten (10) days or more during that quarter will receive the full quarter's payment.

The parent or guardian and the two schools may negotiate any amount owed to the new school from the quarterly payment made to the first school. This is not required, but, in the spirit of partnership for the good of the student, is highly recommended.

Parents or guardians should allow five (5) business days for the current school to withdraw the student. If the student has not been withdrawn after five business days, they should [contact the Customer Engagement Center](#) at Step Up For Students.



Direct Payment for College Savings Plans

Florida 529 College Savings Plans

A request for direct payment must include a Florida 529 College Savings Plan account statement with the following:

- Scholarship student's first and last name
- Scholarship student's Florida 529 College Savings Plan account number
- Account type (this must be an UTMA or UGMA account)

In EMA: The parent or guardian should use the "Find a Provider" feature, select the student for whom they wish to make a contribution, and then select "Florida 529 College Savings Plan" from the dropdown menu.

Direct contribution requests must be submitted by the 14th day of each month and will be sent to Florida Prepaid for verification monthly before each payment is made. The student's name listed on the scholarship account must match the name of the beneficiary of the Florida 529 College Savings account.

Any requests received after the 14th day of each month will not be sent to Florida Prepaid for verification until the following month.

FES-UA scholarship funds deposited into a Florida 529 College Plan may only be used to pay for postsecondary expenditures and may not be used for K – 12 expenditures, including at any private school.

MyScholarShop

Step Up For Students has developed [MyScholarShop](#), an e-purchasing platform where parents or guardians can purchase pre-approved items without any upfront cost.

MyScholarShop will become accessible within a few weeks after funds are deposited into a student's account. Parents or guardians can log in to EMA to access MyScholarShop.

If an item is not in MyScholarShop or the program [Purchasing Guide](#), it may still be an eligible expense. If an item is in MyScholarShop, it may not be an eligible item for all scholarship programs for direct purchasing or reimbursement. Additionally, if a parent purchases an item out of pocket that is identical to one within MyScholarShop for a lesser amount, the parent must be reimbursed for that item if it is eligible for their scholarship program.

Parents or guardians should submit a pre-authorization form if they are unsure an item is eligible.

MyScholarShop Guidelines

- The parent or guardian should ensure they have enough available funds in the scholarship account to cover the entire purchase.
- These policies, including pre-approval of items available for purchase through MyScholarShop, do not apply to in-store purchases or purchases from vendor websites.



- If an item requires pre-authorization, the pre-authorization request must be approved before a parent or guardian places the order. The approved pre-authorization number must be included in the appropriate field to avoid a delay or denial of order.
- If an item has an associated purchasing rule, such as size or frequency limitation, those same rules apply in MyScholarShop.
- The parent or guardian should include all purchases in a single order.
- MyScholarShop orders will ship to the physical address listed in the guardian profile in EMA.
- Step Up For Students reserves the right to deny requests.

MyScholarShop Returns

Returns are completed through the vendor they were purchased from and not through Step Up For Students. Items may not be returned to a store.

Individual vendors list their return policies and instructions in MyScholarShop.

Once the vendor has received the item, it may take up to a few weeks for the funds to be credited to the student's scholarship account.

Status Definitions

Below is a glossary of the statuses that describe the progress of an order in MyScholarShop.

- **Composing:** Request is pending; the cart has not been submitted for purchase.
- **Submitted:** Request was submitted and is pending review.
- **Approved:** Items requiring review have been approved and sent to the vendor(s) for fulfillment.
- **Denied:** Items requiring review have been denied. One appeal is allowed.
- **Ordering:** A fully approved order is in the process of being generated.
- **Ordered:** All items associated with an order or requisition have been sent to the vendor to fulfill.
- **Cancelling:** Order was cancelled after it was placed.
- **Cancelled:** Order was cancelled after it was submitted and approved.
- **Receiving:** Ordered items have been shipped and are in the process of being delivered.
- **Received:** Ordered items have been fully received.

Submitting Reimbursement Requests

Parents or guardians who choose to pay for eligible tuition, fees, items or services out of pocket may apply to have those expenditures reimbursed from their student's scholarship account.

Step Up For Students approves reimbursement of items within the guidance of Florida statutes related to the scholarship program, as well as Florida Department of Education rules and Step Up For Students policies and procedures and reserves the right to close or deny any reimbursement request submitted for payment.



Students will submit all reimbursement requests through the EMA Marketplace.

Step-by-step instructions for submitting a reimbursement request in EMA are [available here](#).

Reimbursement Timing

Reimbursement requests are year-specific. Requests for reimbursements using scholarship funds from the 2024-25 school year may be submitted at any time after the purchase is made, as long as the items or services were purchased between July 1, 2024, and June 30, 2025.

In addition, reimbursements for purchases made in the following categories between July 1, 2023 and June 30, 2024 are eligible for reimbursement with scholarship funds.

- Eligible Private School Tuition and Fees
- Home Education Instructional Program Tuition and Fees
- Public School Contracted Services
- Full-Time Private Tutoring
- State-Approved Virtual Instruction Provider
- State-Approved Online Course
- Curriculum

In these instances, reimbursements should be submitted during the school year in which the service is rendered (or curricula is used), but the proof of purchase may be from the immediately preceding fiscal year.

For example, if a student receives instruction from a home education instructional program during the 2024-25 school year, a parent or guardian should apply for reimbursement between July 1, 2024 and June 30, 2025, but the proof of purchase may be dated July 1, 2023 or later.

This policy is intended to help parents or guardians cover expenses they paid for in advance in preparation for the 2024-25 school year.

Students funded at any point during the 2024-25 school year can submit reimbursements for purchases dated between July 1, 2024 and June 30, 2025.

Please allow up to sixty (60) days for a reimbursement request with the required supporting documentation to be fully reviewed.

Reimbursement Status Definitions

As a reimbursement is processed in EMA, it will progress through three statuses:

- **Submitted:** Step Up For Students has received the reimbursement request for the identified purchase.
- **In Review:** Step Up For Students is reviewing the reimbursement request.
- **Completed:** Step up For Students has reviewed the reimbursement request, and a decision on the reimbursement request is pending.

Once the reimbursement is completed, it will be flagged as:



- **Approved:** The reimbursement request will be fulfilled for the identified purchase, and payment is on the way.
- **Denied:** The reimbursement request will not be fulfilled for the identified purchase. Step Up For Students will provide the denial reason via email to the email address in EMA. Common denial reasons include incorrect or insufficient documentation for the purchase, or the purchase was submitted using the wrong category. More information about appealing a denied reimbursement is available in [Appeals](#).
- **On Hold:** The reimbursement request needs further action, information, or documentation from the parent or guardian. Step Up For Students will provide information via email to the email address in EMA.

If additional documents are requested for an On Hold reimbursement and none are submitted within thirty (30) days, it will automatically be denied, and the parent or guardian will need to submit a new reimbursement request.

Advance Reimbursement

Parents or guardians can apply for reimbursement for services up to three months in advance. For example, if a tutor asks for payment in advance, a parent can apply on September 1 for reimbursement of tutoring fees paid through the end of November.

Requests submitted for services more than three months in advance may be approved through the remainder of the school year, up to one year, if the provider attests that the services paid in advance are non-refundable.

Parents and guardians must submit a signed and dated letter from the provider stating the payment is non-refundable or submit published policies from the provider showing these requirements.

Required Supporting Documentation

For a reimbursement request to be approved, the parent or guardian will need to show:

1. Proof of payment.
2. The purchase is a qualified use of scholarship funds.

Step Up For Students may request additional documentation or clarification when the reimbursement request is reviewed. The parent or guardian will be notified by email to the email address in EMA.

Proof of Payment

The following documents can serve as proof that the parent or guardian paid for the purchase:

- Credit card receipt showing the full transaction date (mm/dd/yy), provider name, and amount.
- Credit card/bank statement showing the full transaction date (mm/dd/yy), provider name, and amount.



- PayPal receipt showing the full purchase date (mm/dd/yy), provider name, amount, and funding source.
- Copy of the front and back of the cleared check showing the full payment date (mm/dd/yy), provider name, and amount. When submitting a copy of a cleared check, black out the routing and account numbers.

An invoice that does not show it has been paid in full and does not show the means of payment (such as the number of the credit or debit card used), will not count as proof of payment.

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

Proof of Payment For Private School Tuition Using Tuition Management Systems

A private school's tuition management system (e.g. FACTS, Blackbaud, TADS) may include the information needed to provide proof of payment.

The billing statement should include:

- School's name and address
- Scholarship student's first and last name as listed in EMA
- Description of each payment to be reimbursed (including but not limited to tuition, registration fee, book fees, etc.)
- Date of full payment (mm/yy)

Amount of each transaction. A tuition management system account may show activity related to multiple students and transactions. Each reimbursement request should include the specific scholarship student, and the specific transactions, for which the parent or guardian is seeking reimbursement.

If a private school's tuition management system groups students by family and does not show spending for individual students, a parent or guardian can submit an invoice from the school with appropriate documentation as stated in [Tuition and Fees at an Eligible Private School](#).

Cash, Checks, & Private Sellers

Cash payments to a provider require a signed, dated letter from the provider on their letterhead that includes:

- Provider's name
- Scholarship student's first and last name
- Description of service (tuition, registration, etc.)
- Date of full payment (mm/dd/yy)
- Amount of purchase
- Method of payment (cash/check).



Requests for reimbursement of cash purchases from private sellers that are not affiliated with a company or institution (garage sale, Facebook Marketplace, Craigslist, private tutors, private therapists) will be denied.

When making purchases from private sellers, payment in the form of a personal or cashier's check, money order, PayPal, Venmo or other electronic payment method is required. This form of payment provides verification of the purchase, which is required for reimbursement.

When submitting a cashier's check, a copy of the cashier's check or a bank receipt confirming the purchase is required.

Payment With Credit Card Points, Gift Cards, & Cash Equivalents

Purchases made using reward or loyalty points, credits or gift cards may only be eligible for reimbursement if the proof of payment clearly shows the cash value of the payment method.

For example: A parent or guardian makes an eligible purchase for \$40.48. They pay \$30 with their credit card and \$10.48 using reward points.

They can be reimbursed for the full purchase price of \$40.48 if the receipt from their purchase clearly shows a full price of \$40.48, and the full purchase was for eligible expenses.

If the receipt does not show the full purchase price, they can only be reimbursed for \$30 – the portion paid with a credit card.

Reimbursement For Installment Payments

If an approved purchase is made using layaway, an installment plan, or a buy now, pay later service such as Klarna or Affirm, Step Up For Students cannot reimburse the full purchase amount until all payments have been made.

However, each installment payment on the approved purchase is eligible for reimbursement once the payment has been made.

Note: Parents or guardians utilizing a payment plan for Florida Theme Park admission must wait until the ticket or pass has been paid in full (or up to \$299) before submitting their reimbursement request.

Documenting Eligible Uses of Scholarship Funds

Each purchase category has specific requirements for documentation demonstrating that it qualifies as an eligible use of scholarship funds.

Details on eligible uses of scholarship funds are available in the program [Purchasing Guide](#).

Instructional Materials, Curriculum, or Curriculum Materials

The invoice or receipt must include:

- Item(s) purchased
- Full date of purchase, including year
- Place of purchase



- Amount of the purchase, including item price, subtotal, taxes, fees, discounts, and total
- Method of payment (see [Proof of Payment](#) section)

If there are several items listed on the receipt, underline or highlight the item(s) the reimbursement request is for. If possible, purchase the item(s) in a different transaction.

Physical Education (P.E.)

The invoice or receipt must include:

- Scholarship student's first and last name*
- Instructor's first and last name or provider's company/league name
- Type of service rendered
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Service rate
- Method of payment (see [Proof of Payment](#) section).

*The scholarship student's first and last name are required for classes, instructional services or lessons. They are not required for purchased goods, rentals, or general admission tickets.

Electives & Enrichment

Reimbursement requests for elective classes, enrichment or lessons must include documentation demonstrating the provider meets the requirements for part-time tutoring or Choice Navigator services (see the Purchasing Guide for these requirements), or has one of the following:

- A valid or expired Florida educator's certificate
- Minimum of three years of experience in the relevant subject area as demonstrated by employment records
- Currently enrolled in a postsecondary educational institution as a student of the relevant subject area
- Degree from a postsecondary educational institution in the relevant subject area
- Certification or national accreditation in the relevant subject area

Additionally, the invoice or receipt must include:

- Scholarship student's first and last name
- Instructor's first and last name
- Provider's company name, if applicable
- Type of service rendered
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Service rate
- Method of payment (see [Proof of Payment](#) section).

Specialized Services

The invoice or receipt on business letterhead must include:



- Scholarship student's first and last name
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Type of service rendered
- Amount due for the service
- First and last name of the therapist who rendered the service
- Method of payment (see [Proof of Payment](#) section)

If the invoice includes medical billing codes rather than the type of service rendered, it may result in processing delays.

FLDOE Approved Pre-Apprenticeship Program

The invoice or receipt on craftsperson or company letterhead must include:

- Scholarship student's first and last name
- Name of the FLDOE-approved pre-apprenticeship course
- Craftsperson name, company name (if applicable) and license number or listed on FLDOE website
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Program rate
- Total amount due for the service
- Method of payment (see [Proof of Payment](#) section)

More information about FLDOE approved pre-apprenticeship programs can be found [here](#).

Full-Time Private Tutoring Program

Full-time private tutoring is an option for students to satisfy state attendance requirements outlined in s. [1002.43](#), F.S. Parents must select a credentialed provider and participate in a minimum number of instructional hours by grade level.

The invoice or receipt on business letterhead must include:

- Scholarship student's first and last name
- Tutor's first and last name
- Tutor's Florida Department of Education certification number
- Tutor's company name, if applicable
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Tutor's hourly rate
- Total amount due for the service
- Method of payment (see [Proof of Payment](#) section)

The invoice or receipt must also show that the reimbursement is for full-time tutoring, and the parent must ensure they are seeking reimbursement under the full-time tutoring category.



To ensure correct processing, each reimbursement request should include documentation of the service provider's license number and/or credentials.

For their services to be eligible for reimbursement, full-time tutors who have not previously received payment via scholarship funds will be required to submit a Step Up For Students [Full-Time Tutor Participation Agreement](#) and W-9. Parents or guardians should consult with their provider.

Part-Time Tutoring Services or Choice Navigator Services

The invoice or receipt on business letterhead must include:

- Scholarship student's first and last name
- Tutor's or navigator's first and last name
- Tutor's company name, if applicable
- Type of service rendered
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Tutor's hourly rate (not required for Choice Navigator services)
- Total amount due for the service
- Method of payment (see [Proof of Payment](#) section)

To ensure correct processing, each reimbursement request should include documentation of the service provider's license number and/or credentials.

Documentation of Credentials

To qualify as a part-time tutor or a Choice Navigator, a provider needs to document their credentials.

If the provider of these services has not already been approved in EMA, reimbursement requests for these services should include documentation of their credentials. Options for acceptable documentation are detailed in the program [Purchasing Guide](#).

Stanley G. Tate Florida Prepaid College Program

The reimbursement request must include a Florida Prepaid College Program account statement with the following:

- Scholarship student's first and last name
- Scholarship student's Florida Prepaid College Program Plan account number
- Account type (e.g. one year Florida University Plan)
- A copy of the Florida Prepaid account statement showing proof of payment including:
 - Full payment date, including year
 - Payment amount

In EMA:

Reimbursement requests must be submitted by the 14th day of each month and will be sent to Florida Prepaid for verification monthly before each reimbursement or payment is made. The



student's name listed on the scholarship account must match the name of the beneficiary of the Florida Prepaid account.

Any requests received after the 14th day of each month will not be sent to Florida Prepaid for verification until the next month.

Florida 529 College Savings Program

Florida 529 College Savings Program contributions must occur via direct payment. Florida 529 College Savings Program reimbursement requests submitted for payment to the parent or guardian will be denied. More information on direct contributions to 529 college savings programs is available in [Florida 529 College Savings Plans](#).

Contracted Services Provided By A Public School or District

The reimbursement request must include:

- Scholarship student's first and last name
- Name and address of the school
- Services provided
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- A statement showing the amount paid (or billed)
- Proof of payment (see [Proof of Payment](#) section)

Tuition & Fees At An Eligible Private School

Requests for reimbursement of tuition and fees at an eligible, participating private school submitted by the parent or guardian must include a complete invoice and proof of payment containing the following information:

- School's published tuition and fee rates
- Annual tuition rate for the scholarship student
- Name and address of the private school
- Scholarship student's first name and last name (The student's name on the invoice must match Step Up For Student's records. Nicknames, middle names as first names, etc. are not accepted.)
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- School year the payment is for
- Method of Payment (see [Proof of Payment](#) section)
- Itemized charges for each tuition or fee payment

The program [Purchasing Guide](#) lists prohibited fees. School lunch and before- and after-school care are not covered.



If the private school uses a tuition management system (e.g. FACTS, Blackbaud, TADS), only the annual fee for use of the billing service will be eligible for reimbursement. Any fees charged for use of a credit card will not be reimbursed.

If a student withdraws or transfers, refunds (if any) will be based on the school's policy and must be paid back to Step Up For Students for credit to the student's scholarship account. The parent or guardian may not accept refunds of scholarship dollars from the school.

Tuition and/or fees paid to an ineligible private school that does not participate in the scholarship program are not eligible for reimbursement.

Tuition & Fees As A Private-Pay Student For Florida Virtual School (FLVS)

The reimbursement request must include:

- Scholarship student's first and last name
- Name of course paid for (or billed)
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- A statement showing the amount paid (or billed)
- Proof of payment (see [Proof of Payment](#) section)

If the student withdraws from the course within fourteen (14) days, a refund will be issued to the entity/individual from which payment was received.

Tuition & Fees At An Eligible Postsecondary Institution, A Home Education Instructional Program, or An Approved Online or Virtual Provider

Reimbursement requests must include:

- Scholarship student's first and last name
- Name of the institution or course provider
- Course description
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Amount of tuition and fees
- Proof of payment, on institution letterhead, if applicable (see [Proof of Payment](#) section)

Tuition & Fees For An Approved VPK Program Provider or An Approved School Readiness Provider

Reimbursement requests must include:

- Scholarship student's first and last name
- Name and address of the approved provider
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Description of the services provided
- Amount of tuition and fees



- Proof of payment (see [Proof of Payment](#) section)

Tuition and fees must be for the educational needs of the student and may cover a full-day program, and must be accurately described in the invoice. Fees for nursery or daycare will not be covered.

School lunch and other fees that are not mandatory or are not educational are not covered by the scholarship.

If a student withdraws or transfers schools, refunds (if any) will be based on the provider's policy and must be paid back to Step Up For Students for credit to the student's scholarship account. The parent/guardian may not accept refunds of scholarship dollars from providers.

Fees For Specialized After-School Education Programs or Specialized Summer Education Programs

Reimbursements must include:

- Scholarship student's first and last name
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Description of the services provided
- Amount of fees
- Proof of payment (see [Proof of Payment](#) section)

Fees For Annual Home Education Evaluation or Standardized Testing, Including Test Administration & Proctoring

Reimbursement requests must include:

- Scholarship student's first and last name
- Full date of the evaluation/test, including year
- Description of the services provided
- Amount of fees for the evaluation/test
- Documentation of the teacher's Florida Department of Education certification number
- Proof of payment (see [Proof of Payment](#) section).

Transition Services Provided By Job Coaches

Transition services provided by job coaches at eligible private schools may be included in the school's fees (see [Tuition and Fees](#) for required documents)

Reimbursement requests for transition services provided by a job coach outside an eligible private school must include:

- Scholarship student's first and last name
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Description of the services provided
- Total amount due for the service



- Proof of payment (see [Proof of Payment](#) section)
- Documentation the job coach meets one of the criteria listed in the [Authorized Uses of Scholarship Program Funds](#) section.

Fees For Horse Therapy

Includes equestrian therapy services provided at a center that is a member of the Professional Association of Therapeutic Horsemanship International (PATH).

The invoice or receipt on business letterhead must include:

- Scholarship student's first and last name
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Type of service rendered
- Amount due for the service
- First and last name of the therapist who rendered the service
- Method of payment (see [Proof of Payment](#) section)

If the invoice includes medical billing codes rather than the type of service rendered, it may result in processing delays.

Fees For Music & Art Therapy

Includes services provided by a therapist who is certified by the Certification Board for Music Therapists or Credentialed by the Art Therapy Credentials Board, Inc.

The invoice or receipt on business letterhead must include:

- Scholarship student's first and last name
- Time period of service rendered (e.g. date range of services, or Semester 1, or Winter Session, or Fall Semester)
- Type of service rendered
- Amount due for the service
- First and last name of the therapist who rendered the service
- Method of payment (see [Proof of Payment](#) section)

If the invoice includes medical billing codes rather than the type of service rendered, it may result in processing delays.

Reimbursement Mechanism

Once approved, reimbursements can be paid to a parent or guardian from the student's scholarship account via direct deposit (ACH). Parents or guardians with an EMA account may also receive reimbursement by check or PayPal.

If direct deposit (ACH) is selected, the parent or guardian will be asked to submit personal banking information. If an ACH payment is rejected by the banking institution, the funds will revert to the student's scholarship account after thirty (30) days.



Reimbursements for multiple scholarship students on multiple scholarship programs will be paid separately.

More information about reimbursement payments [is available here](#).

Appeals

If a reimbursement request is denied, the parent or guardian may appeal the decision once by submitting a new reimbursement request, noting in the description box it is an appeal or reconsideration request, and providing additional documentation.

After the appeal decision is made, additional appeals for the same item will not be reviewed.

Appeals will only be reviewed through the established process. Step Up For Students is unable to review appeals or resubmission requests that are sent via email or through any other customer service channel.

Reimbursement requests placed on hold for longer than thirty (30) days after a request for additional documentation will be denied and require resubmission.

Actions That May Lead To A Loss of The Scholarship

Actions that may lead to a loss of the scholarship include, but are not limited to:

- Misrepresenting or withholding information on the scholarship application or reimbursement documentation.
- Failure to enroll a K-12 student in a private school or as a Home Education Student with their Florida public school district.
- Failure to satisfy state compulsory attendance requirements as provided in Florida Statute [1003.01\(16\)\(b\), \(c\), or \(d\)](#).
- Failure to satisfy attendance requirements outlined by their eligible private school, if applicable.
- Failure of the student to take a required nationally norm-referenced test or the statewide assessment, if applicable (students exempt from norm-referenced testing are not subject to this requirement).
- Moving or residing outside of the state of Florida. With the exception of renewal FES-UA scholarship students of active-duty members of the United States Armed Forces with Permanent Change of Station (PCS) orders to move out of Florida.
- Enrolling in a public school, including the Florida Virtual School, the Florida School For The Deaf and Blind, the College-Preparatory Boarding Academy, the Florida School for Competitive Academics, the Florida Scholars Academy, a developmental research school, a charter school, or any other Florida public school, on a full-time basis.
- Utilizing another state scholarship.
- Fraudulent activity, including taking possession of any scholarship funds by refund, resale, rebate, or credit from a provider or purchase.



- Allowing another party, including a provider or school representative, to access or manage a student's scholarship account.
- Step Up For Students determines the student is not eligible for program renewal.
- The Commissioner of Education suspends or revokes program participation or use of funds.
- The student graduates high school or reaches twenty-two (22) years of age, whichever occurs first.

The above actions, or any violation of scholarship statutes, rules, policies, or procedures may result in the loss of the scholarship, loss of future scholarship eligibility, and/or financial or criminal penalties.


For More Information


- [Document Library](#)
- [Resources Page](#)
- [FES-UA Scholarship Information](#)
- [FES-UA Handbook Feedback Form](#)
- [FES-UA Purchasing Guide](#)
- [Program Facts](#)
- [Find a School Tool](#)
- [Educational Benefit Form](#)


Contact Information

Step Up For Students wishes all scholarship students a productive and fun-filled 2024-25 school year.

There are three ways to reach Step Up For Students:

 Chat with a live agent at StepUpForStudents.org

 Call (877) 735-7837

 Submit inquiry through [Contact Us](#)

The Customer Engagement Center is generally open from 8:00 a.m. to 5:00 p.m. EST. During peak periods, hours may be extended. For Customer Engagement Center hours, visit the [Contact Us](#) page on the Step Up For Students website.



Appendix A

Disability definitions

Anaphylaxis

The medical term for the life-threatening allergic reactions that may occur when allergic individuals are exposed to specific allergens. Anaphylaxis is a collection of symptoms affecting multiple systems in the body.

Autism Spectrum Disorder

As defined in the Diagnostic and Statistical Manual of Mental Disorders, Fifth Edition, published by the American Psychiatric Association.

Cerebral Palsy

A group of disabling symptoms of extended duration which results from damage to the developing brain that may occur before, during, or after birth and results in the loss or impairment of control over voluntary muscles. For the purposes of this definition, cerebral palsy does not include those symptoms or impairments resulting solely from a stroke.

Down Syndrome

A disorder caused by the presence of an extra chromosome 21.

Dual Sensory Impaired

A student who has dual-sensory impairments affecting both vision and hearing, the combination of which causes a serious impairment in the abilities to acquire information, communicate, or function within the environment, or who has a degenerative condition which will lead to such an impairment. Current IEP required.

Emotional or Behavioral Disability

A student with an emotional/behavioral disability who has persistent (is not sufficiently responsive to implemented evidence-based interventions) and consistent emotional or behavioral responses that adversely affect performance in the educational environment that cannot be attributed to age, culture, gender, or ethnicity.

Hearing Impairment

A student who is deaf or hard-of-hearing and has hearing loss aided or unaided, that impacts the processing of linguistic information, and which adversely affects performance in the educational environment. The degree of loss may range from mild to profound.

High-Risk Child

A child from three (3) to five (5) years of age before September 1st of the school year with one or more of the following characteristics:

- A developmental delay in cognition, language, or physical development.
- A child surviving a catastrophic infectious or traumatic illness known to be associated with developmental delay, when funds are specifically appropriated.



- A child with a parent or guardian with developmental disabilities who requires assistance in meeting the child's developmental needs.
- A child who has a physical or genetic anomaly associated with developmental disability.

At age six (6), a student qualifying as a high-risk child must establish eligibility under a different category to continue in the program.

Hospital or Homebound

A student who has a medically diagnosed physical or psychiatric condition which is acute or catastrophic in nature, or a chronic illness, or a repeated intermittent illness due to a persisting medical problem that confines the student to home or hospital and restricts activities for more than six months, as defined by rules set by the Florida Board of Education. A current IEP is required to confirm this diagnosis.

Intellectual Disability

Significantly sub average general intellectual functioning existing concurrently with deficits in adaptive behavior which manifests before the age of 18 and can reasonably be expected to continue indefinitely.

“Adaptive behavior” means the effectiveness or degree with which an individual meets the standards of personal independence and social responsibility expected of his or her age, cultural group, and community.

“Significantly subaverage general intellectual functioning” means performance that is two or more standard deviations from the mean score on a standardized intelligence test specified in the rules of the agency.

Language Impairment

Language impairments are disorders of language that interfere with communication, adversely affect performance and/or functioning in the student's typical learning environment, and result in the need for exceptional student education. A language impairment is defined as a disorder in one or more of the basic learning processes involved in understanding or in using spoken or written language. These include: phonology, morphology, syntax, semantics, pragmatics.

The language impairment may manifest in significant difficulties affecting listening comprehension, oral expression, social interaction, reading, writing, or spelling. A language impairment is not primarily the result of factors related to chronological age, gender, culture, ethnicity, or limited English proficiency.

Muscular Dystrophy

Muscular dystrophies are a group of muscle diseases caused by mutations in a person's genes. Over time, muscle weakness decreases mobility, making everyday tasks difficult. There are many kinds of muscular dystrophy, each affecting specific muscle groups, with signs and symptoms appearing at different ages, and varying in severity.



Orthopedic Impairment

Orthopedic impairment means a severe skeletal, muscular, or neuromuscular impairment. The term includes impairments resulting from congenital anomalies (e.g., including but not limited to skeletal deformity or spina bifida), and impairments resulting from other causes (e.g., including but not limited to cerebral palsy or amputations).

Other Health Impairment

Other health impairment means having limited strength, vitality or alertness, including a heightened alertness to environmental stimuli, that results in limited alertness with respect to the educational environment, that is due to chronic or acute health problems. This includes, but is not limited to, asthma, attention deficit disorder or attention deficit hyperactivity disorder, Tourette syndrome, diabetes, epilepsy, a heart condition, hemophilia, lead poisoning, leukemia, nephritis, rheumatic fever, sickle cell anemia, and acquired brain injury.

Phelan-McDermid Syndrome

A disorder caused by the loss of the terminal segment of the long arm of chromosome 22, which occurs near the end of the chromosome at a location designated q13.3, typically leading to developmental delay, intellectual disability, dolichocephaly, hypotonic, or absent or delayed speech.

Prader-Willi Syndrome

An inherited condition typified by; neonatal hypotonia with failure to thrive, hyperphagia or an excessive drive to eat which leads to obesity usually at 18 to 36 months of age, mild to moderate mental retardation, hypogonadism, short stature, mild facial dysmorphism, characteristic neurobehavior.

Rare Diseases

Rare diseases which affect patient populations of fewer than 200,000 individuals in the United States, as defined by the National Organization for Rare Disorders.

Specific Learning Disability

A specific learning disability is defined as a disorder in one or more of the basic learning processes involved in understanding or in using language, spoken or written, that may manifest in significant difficulties affecting the ability to listen, speak, read, write, spell, or do mathematics. Associated conditions may include, but are not limited to, dyslexia, dyscalculia, dysgraphia, or developmental aphasia. A specific learning disability does not include learning problems that are primarily the result of a visual, hearing, motor, intellectual, or emotional/behavioral disability, limited English proficiency, or environmental, cultural, or economic factors.

Speech Impairment

Speech impairments are disorders of speech sounds, fluency, or voice that interfere with communication, adversely affect performance and/or functioning in the educational environment, and result in the need for exceptional student education.



Spina Bifida

A person with a medical diagnosis of spina bifida cystica or myelomeningocele.

Traumatic Brain Injury

A traumatic brain injury means an acquired injury to the brain caused by an external physical force resulting in total or partial functional disability or psychosocial impairment, or both, that adversely affects educational performance. The term applies to mild, moderate, or severe, open or closed head injuries resulting in impairments in one or more areas such as cognition, language, memory, attention, reasoning, abstract thinking, judgment, problem-solving, sensory, perceptual and motor abilities, psychosocial behavior, physical functions, information processing, or speech. The term includes anoxia due to trauma. The term does not include brain injuries that are congenital, degenerative, or induced by birth trauma.

Visually Impaired

Students who are blind, have no vision, or have little potential for using vision or students who have low vision. The term visual impairment does not include students who have learning problems that are primarily the result of visual perceptual and/or visual motor difficulties. (FLDOE definition)

Williams Syndrome

A rare genetic disorder characterized by growth delays before and after birth (prenatal and postnatal growth retardation), short stature, a varying degree of mental deficiency, and distinctive facial features that typically become more pronounced with age as defined by the National Organization for Rare Disorders.

Authorized Use of Scholarship Funds	Scholarship Program				Payment Method
	FES-UA	FTC/FES-EO	PEP	NWSA	
Instructional materials	X	X	X	X (DP)	DP or R
Curriculum and curriculum materials	X	X	X	X (DP)	DP or R
Tuition and fees for:					
Full-time, in-person private school	X	X			DP or R
Part-time, in-person eligible private school	X		X		DP or R
Hybrid private school			X		DP or R
Home education instructional programs	X		X		DP or R
Eligible postsecondary institution	X	X	X		DP or R
Dual enrollment	X	X	X		DP or R
Approved pre-apprenticeship programs	X	X	X		Reimbursement
Approved online or virtual provider	X	X	X		DP or R
Private-pay Florida Virtual School	X	X	X		DP or R
Approved VPK program provider	X				DP or R
Approved school readiness provider	X				DP or R
Standardized testing fees	X	X	X		DP or R
Contracted services provided by a public school or school district	X	X	X		DP or R
Private tutoring					
Full-time private tutoring	X		X		DP or R
Part-time private tutoring	X	X	X	X (DP)	DP or R
Services provided by a Choice Navigator	X	X	X		DP or R
Contributions to approved college savings programs					
Stanley G. Tate FL Prepaid College Program	X				Reimbursement
FL 529 Savings Program	X				Direct Pay
Specialized services by approved providers or a Florida hospital					
Applied behavior analysis	X				DP or R
Speech-language pathologist services	X				DP or R
Occupational therapy services	X				DP or R
Physical therapy services	X				DP or R
Listening and spoken language specialist services	X				DP or R
Fees for specialized summer education programs	X				DP or R
Fees for specialized after-school education programs	X				DP or R
Fees for summer education programs that improve reading, literacy, or math skills				X (DP)	Direct Pay
Fees for after-school education programs that improve reading, literacy, or math skills				X (DP)	Direct Pay
Transition services provided by job coaches	X				Reimbursement
Annual home education evaluation fees	X				DP or R
Fees for horse therapy	X				DP or R
Fees for music and art therapy	X				DP or R

"DP" = Direct Pay through EMA or MSS; "R" = Reimbursement. All NWSA purchases must be made by Direct Pay