



An initiative of the Florida Tax Credit Scholarship Program

## ENROLLMENT AND PAYMENT INSTRUCTIONS: DIRECT PAY SALES & USE TAX

We are thrilled that your corporation has elected to enroll in the Florida Tax Credit Scholarship Program, also known as Step Up For Students.

The process to enroll is very simple. Just follow the step-by-step instructions below. Signing up online takes only five minutes. Please note that enrolling does not legally require that you begin making payments immediately, it simply notifies the Florida Department of Revenue (FL DOR) of your intent to participate in the program, and reserves the amount you anticipate transferring to fund scholarships against the state-capped limit of \$218,750,000.

### Online Enrollment Instructions for the Florida Tax Credit Scholarship Program:

1. Sign up online by visiting the FL DOR website. Click on this link:  
[https://taxapp2.state.fl.us/gta/cit-sfo/index.cfm?fuseaction=dsp\\_sfo&bus\\_flag=1](https://taxapp2.state.fl.us/gta/cit-sfo/index.cfm?fuseaction=dsp_sfo&bus_flag=1)
2. Complete all required fields in the application.
3. Under the section where it asks you what you are applying for, select "**Contribution to an SFO**" unless you are using a Credit Carry Forward from a previous donation. Then in the drop-down menu where it asks you to "**Select the Scholarship Funding Organization to which the Contribution will be made**" select **Step Up For Students**. Step Up For Students is the only SFO servicing the entire state of Florida.
4. Enter the **Amount of Planned Contribution** in whole dollars – *do not use decimal points or commas in this field or the application will be rejected.*
5. Then enter the amount of credit allocation in the space labeled "**Sales and Use Tax for a Direct Pay Permit Holder**" (the sum of the amounts must equal the planned contribution or credit carry forward entered above).
6. Complete the remainder of the required information.
7. Click **Submit Application**. You should immediately receive an acknowledgement that the application has been received and is being processed.
8. Once you complete your enrollment, please send your confirmation e-mail from the DOR to Crystal Larocca at [clarocca@stepupforstudents.org](mailto:clarocca@stepupforstudents.org) and she will send you a payment reminder and remittance instructions.

The FL DOR will mail your approval letter within 10 business days. Should you wish to send a payment immediately, you may expedite receipt of the approval letter by calling Annie Jordan at the FL DOR (850) 717-6918 and requesting that it be faxed to you.

*(See next page for payment instructions)*



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## How to Make Payments:

Step Up For Students accepts checks, ACH and wire transfers.

### Remittance Information for STEP UP FOR STUDENTS (Tax ID# 59-3649371)

#### MAILING ADDRESS

P.O. Box 1670  
Tampa, FL 33601

#### PHYSICAL ADDRESS

337 S. Plant Ave.  
Tampa, FL 33606

#### FED WIRE TRANSFERS

SunTrust Bank Atlanta  
ABA No. 061-000-104  
Foundations & Endowments Specialty Practice  
Credit Account Number 9088000415  
For Further Credit to Account Number: 5321350  
Attention: Step Up For Students, Inc

#### ACH TRANSFERS

SunTrust Bank Atlanta  
ABA No. 061-000-104  
Credit Account Number 1000113400138  
For Further Credit to Account Number: 5321350  
Attention: Step Up For Students, Inc

## How to Claim Your Credit with the Department of Revenue:

1. Upon receipt of your contribution, Step Up For Students will e-mail you an acknowledgement called a Certificate of Contribution.
2. Email the Certificate of Contribution to Annie Jordan at the Florida Department of Revenue at [REVENUEACCOUNTING@DOR.state.fl.us](mailto:REVENUEACCOUNTING@DOR.state.fl.us) or you can also fax the Certificate of Contribution to her attention at (850) 245-8984.
3. Once Annie Jordan receives the Certificate of Contribution she will send you an acknowledgement letter with instructions on how to claim your credit as follows:
  - Complete Line 21(a) (Scholarship Fund Credit) on the back side of your sales and use tax return.
  - Carry the amount forward to Line 8 (Less Estimated Tax Paid/DOR Credit Memo) on the front of your sales and use tax return.
  - The total amount of the credit claimed for the month cannot exceed Line 7 (Total Tax Due).

**Thank You!** Our deepest gratitude goes out to you and your corporation. Your commitment to help underprivileged children receive a quality education is a major contribution to their future and to our state.

**FOR ADDITIONAL INFORMATION CONTACT KERRI VAUGHAN AT (866) 344-9553**