Help is Here!

FLORIDA TAX CREDIT SCHOLARSHIP
SCHOOL HANDBOOK
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**Step Up For Students Overview**

Step Up For Students is a state-approved nonprofit scholarship funding organization that empowers families to pursue and engage in the most appropriate learning options for their children, with an emphasis on families who lack the information and financial resources to access these options. By pursuing this mission, we help public education fulfill the promise of equal opportunity.

One of the primary focuses of Step Up For Students is the administration of four scholarships for students in Florida: the Florida Tax Credit Scholarship Program (FTC) for lower to middle income families, the Family Empowerment Scholarship (FES) for students with certain special needs or are lower and middle income families, the Hope Scholarship for students who are bullied or are victims of violence and the Reading Scholarship Accounts Program for public school students in third through fifth grades who struggle with reading.

The Florida Tax Credit Scholarship was created in 2001 with the sole objective of providing children from low-income families a learning option they may not otherwise be able to afford. This program depends on the contributions of companies, which are then awarded state tax credits.

**How do families qualify and apply for the scholarship?**

**How do families qualify for a scholarship?**

To qualify for the Florida Tax Credit Scholarship (FTC), the student must meet the age eligibility criteria and the family must meet the household income requirements. To see a chart of the income guidelines, click [here](#). To qualify for the scholarship, the following requirements must be met:

- The student is a resident of the state of Florida
- If the student is entering kindergarten s/he must be five years old on or before September 1\(^{st}\)
- If the student is entering first grade s/he must be six years old on or before September 1\(^{st}\)
- An owner, operator, superintendent, or principal of an eligible private school or a person with equivalent decision-making authority over an eligible private school does not qualify for a Florida Tax Credit Scholarship. However, they may qualify for a Family Empowerment Scholarship if they meet the requirements. Please see the Family Empowerment Scholarship Educational Options handbook for more information.
- A student enrolled in more than two courses offered by Florida Virtual School, a correspondence school or distance learning program receiving state funding is NOT eligible to receive a Florida Tax Credit Scholarship during that academic year.

Children who are in foster care, out-of-home care or are dependents of a parent or guardian in the U.S. Armed Forces, may apply at any time, pending funding availability.

Once a student qualifies for a scholarship, the student’s household income does not need to be re-evaluated as long as the student continues to reside in Florida, or until he/she graduates from High School or turns 21, whichever occurs first.

Please note: The income requirements for the Florida Tax Credit and Family Empowerment Scholarships are the same. Students who meet the requirements will be awarded a Family Empowerment Scholarship. If the student is deemed ineligible by the Florida Department of Education but meets the requirements
for the Florida Tax Credit Scholarship, the student will remain eligible for the Florida Tax Credit Scholarship. Otherwise, the student will be denied a scholarship.

Eligible students will fall into one of the following categories:

- **Renewal** – a student who attended an eligible, participating private school and used scholarship funds during the previous academic year.
  - Renewal students do not need to meet income requirements after their initial eligibility year. This means that students remain eligible for a Florida Tax Credit Scholarship regardless of the household income.

- **Add-on** - a new student being considered for a scholarship who resides in the same household as the renewal student.
  - Students who fall under this category do not need to meet household income requirements but must still meet the age eligibility requirements.

- **New** – a student who has never received scholarship funds.

- **Returning** – a student who attended an eligible, participating private school and received funding for at least one day during any school year other than the immediate previous year (2020-21)
  - Returning students do not need to meet income requirements after their initial eligibility year. This means that students remain eligible for a Florida Tax Credit Scholarship regardless of the household income.

**How do families apply for a scholarship?**

Families can apply online at [www.StepUpForStudents.org](http://www.StepUpForStudents.org). There is no fee to apply.

Applications are processed on a first come, first-served basis in the order all documents are received. Renewal students (those who used the scholarship the previous school year) are given processing priority.

Parents may apply or check the status of their application via their secured login on the Step Up for Students website. **The contact information provided by the parent during the application process MUST belong to the parent/guardian/s on the application and NOT the school.** The student’s award letter is available to the parent via their secured login. A copy of the award letter should be provided by the parent to the eligible participating private school of their choice.

**Please note**: Your school should not create a student’s scholarship application, submit documentation, or otherwise act on behalf of the parent. Schools MUST NOT request access to or obtain the parent/guardian’s information to access the student’s scholarship account. Doing so may result in loss of provider participation and/or scholarship eligibility and funding for the student.

For more information on eligibility, please visit: [https://www.stepupforstudents.org/for-parents/income-based/frequently-asked-questions/](https://www.stepupforstudents.org/for-parents/income-based/frequently-asked-questions/).

**Scholarship awards and what is covered:**

Florida Tax Credit (FTC) scholarship award amounts for the upcoming school year are established when the Governor signs the state budget into law, typically by July 1st each year.

Scholarship awards are based on the county and grade of the student.
Scholarship award amounts for the 2021-22 school year can be found by clicking here. 2021-22 School year link is not yet available.

Please note: If a student is found eligible before the school year’s award amounts have been established, their award letter will not display any award amounts. Letters will be updated once the award amounts have been published by the Florida Department of Education. Letters can be accessed by the parent/guardian through their parent portal.

**Prorated Awards:**
The student’s funding is based on the latest of the following four factors:

- The date of the student’s scholarship award
  - Students must be enrolled in their school through our system, via the submission of a School Commitment Form (SCF), 30 days before the scheduled funding date. If a student is not enrolled, the student is not eligible for that quarter’s payment.
  - Funding dates are as follows:
    - September 1, enrollment deadline August 1
    - November 1, enrollment deadline October 1
    - February 1, enrollment deadline January 1
    - April 1, enrollment deadline March 1
- The student’s first day of attendance at the school
- or the date the school became compliant with the Florida DOE

If a student’s tuition and fees are less than the student’s scholarship award amount, the student will receive the lesser amount.

**What is covered?**
The Florida Tax Credit Scholarship offers two options for eligible students. One option is for attendance at a K-12 private school and one option is for transportation to a public school other than the student is assigned to attend.

**Private School Tuition and Fees**
Schools participating in the scholarship program may not charge a different rate for scholarship students. The same published tuition schedule must apply to all students, whether they are on scholarships or paying privately. Likewise, Step Up for Students may not pay for fees that are not included on the published fee schedule provided to all prospective parents.

Many eligible, participating private schools charge more than the value of the scholarship. In some cases, eligible, participating private schools may decide to provide scholarship students with supplemental financial assistance at their own discretion. Parents will be required to pay the difference between the value of the scholarship and the full tuition and fees.

The scholarship may be used towards the following school expenses, in this order:

- Tuition
- Books sold through the school (e.g. textbooks, workbooks, etc.)
- Registration
• Transportation services offered by the school that occur during school hours (e.g. transportation services to/from school or for field trips)
• Uniforms sold through the school
• Testing (e.g. standardized or entrance testing)
• Other fees, not including before and/or after school care services or after school sports fees (e.g. graduation fees, yearbook fees, field trips)

*Before, after and wrap-around care or extracurricular sports are not a covered fee item. Also, fees paid to a third-party vendor (including books and uniforms) will not be covered by the Florida Tax Credit Scholarship.

Students may not receive funding if the student is:

• Enrolled in public school (including the Florida School for the Deaf and the Blind, the College-Preparatory Boarding Academy, or a charter school);
• Enrolled in a school providing education to youth in Department of Juvenile Justice programs;
• Enrolled in a virtual school, correspondence school, or distance learning program that receives state funding unless they are taking no more than two courses per school year;
• Receiving any other educational scholarship under Chapter 1002, Florida Statutes (Family Empowerment, Hope, Reading or McKay).

Scholarship funding can be transferred to another eligible, participating private school during the school year if the student moves within the state, or simply wants to attend a different participating private school.

As a new school, how can we partner with Step Up For Students?
Step Up For Students welcomes private schools to participate in the scholarship program at any time of year. In order for a private school to accept scholarship students, it must be in good standing with the Florida Department of Education and fully compliant with the scholarship statute corresponding to private schools.

Requirements for private schools are focused on two categories: a school’s facility and its personnel. The state is focused on providing a great learning environment for all of Florida’s students and asks private schools to hold themselves to the standards found in s. 1002.421, F.S. A school will work with local agencies, such as fire and health departments, to successfully complete inspections annually. Additionally, school faculty and staff are fingerprinted to ensure they are good candidates to work with students.

Indicate which scholarships your school will accept
Once a school has received their four-digit DOE code, they will need to follow the process below to be able to accept scholarship students:

1. Navigate to www.floridaschoolchoice.org
2. Click on, “Private School Information For Administrators”
3. Use your 4-digit Department of Education code and password to Login under “Existing Private Schools Login.” If you don’t have a DOE code, please click here and follow instructions to obtain a code and password.
4. After logging in, please indicate which scholarship programs the school will participate in.
Sign up for a school webinar through Step up For Students

In order to receive your login with Step Up For Students, you will need to participate in an informational webinar. Please keep in mind that all the information we require will come from your portal with the Florida Department of Education.

- Double check your contact email addresses are up to date in the DOE system and the Step Up For Students School Login Portal
- An email asking schools to sign up for the webinar will be sent to each contact listed in our systems in August.
  - There will be a review of the school training in the middle of the school year.
- The webinar is designed to:
  - Instruct new school administrators on how to use our systems and expectations
  - Go over changes for the upcoming school year
  - Give clarity on any new processes that will affect schools.
- The webinar information will also be listed on the homepage of the school login page.

For additional information regarding the webinar, please contact the Provider Relations team.

Statutory Requirements

In order to accept students receiving the Florida Tax Credit Scholarship, a school must apply with and meet the annual compliance regulations of the Florida Department of Education (DOE). For more information regarding these requirements, please login through to your DOE portal.

Private school administrators are required to be familiar with and know the Florida Tax Credit Scholarship Statutes and Rules. The statute and rules can be found here.

Information regarding the Florida Tax Credit program specifically for private school Administrators can be found here. 2021-22 School year link is not yet available.

For questions related to Florida DOE compliance requirements or deadlines, you may contact your DOE regional manager by calling 800.447.1636. Please see a list of your regional managers by logging in to your DOE portal.

The policies and procedures specific to Step Up for Students are contained in this document. Please take the time to become familiar with them.

Financial Reporting Requirements - Agreed Upon Procedures (AUP) Report

Private schools receiving more than $250,000 in scholarship dollars from the Florida Tax Credit Scholarship, the Gardiner Scholarship, the John M. McKay Scholarship for Students with Disabilities, the Hope Scholarship, the Family Empowerment Scholarship or in aggregate scholarship dollars from multiple programs and/or multiple SFOs in a single academic year must submit a financial report to Step Up For Students (or the scholarship funding organization from whom they receive most scholarship funds from) no later than September 15th of the following year. (i.e. for the 2021-22 school year, reports will be due by September 15, 2022).

Agreed Upon Procedures are required by Florida Statute (1002.421(1) (q.)).
Due to varying award totals by grade level and scholarship this year, a school could have any number of students enrolled, but generally 25 or more students will require the submission of an AUP.

**What’s Involved:**
Schools must hire an Independent Florida-licensed Certified Public Accountant, (CPA), to complete this financial report.

The Agreed Upon Procedures (AUPs) are defined procedures that will guide the CPA as they complete the report on behalf of the private school.

To view the Agreed Upon Procedures guidelines, click [here](#). Florida statute s.1002.395 allows for the agreed upon procedures to be revised every other year. Any changes will be communicated to the schools in a timely manner. Step Up recommends you watch closely for changes each year.

**Why are AUPs important?**
- Financial accountability is essential for scholarship program growth.
  - This accountability may lead to increases in the scholarship fundraising cap, appropriations, and individual scholarship amounts.
- Provides proof that scholarship funds are safeguarded and spent on education-related expenditures.

**Important AUP Details:**
- Section VI.D. requires a Certified Public Accountant (CPA) to visit those schools required to complete an AUP so they may physically review student attendance. *This section must be completed before the end of the school year.*
- Failure to meet the September 15 deadline may result in loss of eligibility to participate in scholarship programs.

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**Step Up for Students**
**Attn: AUP Accounting**
**4655 Salisbury Road, Suite 400**
**Jacksonville, FL 32256**

For questions regarding the Financial Reporting requirement, please contact a Service Ambassador or email your questions to AUP@sufs.org.

**Norm-Referenced Testing**
To demonstrate academic accountability, participating schools are required to conduct a state-approved norm-referenced standardized test annually for scholarship students in grades 3rd through 10th.

A list of state-approved exams may be found by clicking [here](#).
Participating private schools must report a student's scores to the parent and submit score for Florida Tax Credit students to the independent research organization selected by the Department of Education by August 15 each year.

Copies of students’ score sheets with name, testing date, and national percentile ranking must be sent to:

Melissa Dyehouse  
Learning Systems Institute  
Florida State University  
Suite 4600 University Center Bldg. C  
Tallahassee, FL 32306-2540

Failure to submit results by the deadline may result in the loss of eligibility to participate in the scholarship programs.

**When should the school accept scholarship students?**

When a family applies for a Florida Tax Credit Scholarship, it does not mean the student(s) will be awarded.

If a student is found eligible, the parent/guardian is notified via email and can access the student’s award letter through their secured login.

A copy of the student(s) current year award letter should be provided by the parent/guardian to the eligible, participating private school of their choice.

**If your school accepts a student without a current year award letter, your school assumes financial responsibility for that student.**

**Private School Responsibilities**

Prior to accepting a student awarded Scholarship, each school will need to indicate their intent to participate in the Florida Tax credit Scholarship by checking the Florida Tax credit Scholarship box on the school’s Department of Education private school log-in.

Participating private schools must comply with all of the requirements for private schools participating in state school choice programs pursuant to s. 1002.421, F.S. This includes annually administering a nationally norm-referenced test or the statewide assessments for students in grades 3 through 10 and reporting the student's scores to his or her parent.

Participating private schools may also choose to administer the statewide assessment to all private school students in grades 3 through 10 and must submit a request to the Department of Education by March 1 of each year in order to administer the statewide assessments in the subsequent school year.

If a private school fails to meet the requirements of the Florida Tax credit Scholarship Program or s. 1002.421, F.S., the Commissioner may determine that the private school is ineligible to participate in the program.

Participating private schools must abide by the policies of Step Up For Students associated with, but not limited to the timely submission of School Commitment Forms, tuition and fee schedules, Exit Confirmation Forms and completion of pre-funding student verification.
Participating private schools that receive a minimum of $250,000 from any one or a combination of any of the scholarship programs (Hope, Family Empowerment, Florida Tax Credit, or McKay), from either or a combination of Scholarship Funding Organizations (Step Up For Students or AAA Scholarship Foundation) are subject to the Agreed Upon Procedures process.

A copy of the requirements can be found here.

Scholarship Administration System (SAS)
Step Up for Students has an internal system called the Scholarship Administration System (SAS). This system works with the secured school login to process information submitted by the schools and determine funding. Via the school’s secured login, the SAS allows schools to update and maintain the school’s contact information, tuition, fees and tax and banking information, track a student’s scholarship application progress, add, and track student enrollment and withdrawal, validate students to receive scholarship payments, and access tools to assist in the marketing of the scholarship.

How to enroll students:
Enter Tuition and Fees

- Before you can enroll students by submitting SCFs, you must annually enter your school’s tuition and fees in the School Login and submit an electronic copy of your published tuition and fee schedule to Step Up For Students. Log in to your Step Up For Students account by clicking here.
  - Once you are logged in, click on the School Info tab and then on Tuition and Fees and fill in the following information:
    - Annual fees by grade level
    - Start and end dates for the upcoming school year
    - Testing information
  - Review all information to make sure it is correct and then click Submit Tuition and Fees Data for Verification.
  - If you haven't already, please email your published Tuition and Fees to tuitionandfees@sufs.org.
    - Note: You must submit the Tuition and Fees that you provide to your families when their students enrolled at your school. Do not send a screenshot of the Tuition and Fees chart within your Step Up For Students Portal.

A Step Up For Students Service Ambassador will notify you if your Tuition and Fees have been approved or if we have any questions.

Once verified, any changes to your school's Tuition and Fees, including a change to the school's start date or tuition and fees amounts, MUST BE COMPLETED BEFORE the first verification window opens for the upcoming school year. Always monitor your email for notices or updates.

- If a change is needed, contact Service Ambassador already verified tuition and fee submission, please contact a Service Ambassador. Please do not attempt to update information before speaking with a Service Ambassador as changes may require supporting documentation.
• The information entered in the chart should be maximum amount published for ALL prospective families.

Please note: Scholarship students must be charged the same amounts as non-scholarship students.

Revisions to tuition and fees:

• To avoid payment discrepancies, tuition and fees should be entered correctly on the first attempt. If any updates are needed to your tuition and fees, including your school’s start date, once they have been verified by Step Up, please contact a Service Ambassador.

  o Depending on what needs to be updated, the Service Ambassador may instruct you to take the following steps:

    ▪ Provide a letter from your school’s Board of Directors detailing what has changed and why since the previously submission of tuition and fees.

    ▪ Provide a revised tuition and fees document to Step Up (which has been published to parents).

    ▪ If applicable, withdraw all students currently enrolled back to the first day of school listed on the previously submitted Tuition and Fee Schedule. (Note: In this
case, the first date and last date of attendance should equal the first day of school.)

- Contact a Service Ambassador so we may un-verify your school’s tuition and fees.
- Update your school’s tuition and fees in the Step Up School Login and notify Step Up.

*Once we have re-verified your tuition and fees, you may re-enroll scholarship students with the corrected amounts.*

**REMINDERS:**

- Please do NOT attempt to correct or adjust your tuition and fees without speaking to a Service Ambassador first.
- No changes will be allowed to your school’s tuition and fee schedule, including your start date, after the first Verification Report has opened.
- If your school offers discounted fees, these will be provided on a student basis via the School Commitment Form.

**Obtain Student(s) Current Year Award Letter:**

- Obtain a copy of the student’s award letter for the *current* year from the parent/guardian. The award letter contains a year specific Unique Identifier or Student Award ID which is required to enroll the student.

**“Register a Renewal Student” or “Register a Student New To Your School”**

**Register A Renewal Student:**

There are two options to register a renewal student. You can click on ‘Application Status’ and scroll down past the instructions and there will be a list of students who attended your school the prior school year. If the application is in AWARDED status, an icon will appear that will allow you to click and submit a School Commitment Form.

- Along with registering students, your school may use this list to help solicit re-enrollments & track the student’s current year status.

![Image of student list with instructions and icons for submitting School Commitment Form.]
You may also click on the Register a Renewal Student tab, and submit the student’s School Confirmation Form.

Register a Student New to Your School:

This option allows you to search for a new currently awarded FTC student that is new to your school or new to the scholarship program.

- Search for a student using the fields provided and the information as listed on their Award Letter. **NOTE:** To best locate a student is to search by Application ID OR by Award ID. Please do not use all four fields.
Complete and submit a School Commitment Form (SCF) for each student:
Once the student, either new or renewal, has been located in the system, to register a Florida Tax Credit Scholarship student attending your school, you must complete and electronically submit a School Commitment Form (SCF). The SCF must be submitted by the deadlines below to receive that quarter’s payment:

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<th>Quarter</th>
<th>Enrollment deadline</th>
<th>Funds sent to SUFS</th>
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<td>3</td>
<td>1/1/2022</td>
<td>2/1/2022</td>
</tr>
<tr>
<td>4</td>
<td>3/1/2021</td>
<td>4/2/2022</td>
</tr>
</tbody>
</table>

By completing the SCF, the school and parent/guardian are confirming the student’s enrollment and authorizing Step Up to distribute the student’s scholarship funds to the school.

Please note: SCFs must be submitted immediately. Failure to submit a student’s SCF in a timely manner may result in no payment, a delayed payment for your school, a proration of the student’s award amount, or possible award expiration for that student.

How to complete a School Commitment Form (SCF):
1. Find the student through either the “Register a Renewal Student” or “Register a Student New to Your School” section and click the “Register” button by their name.
2. Enter the student’s Award ID located in the middle on his/her award letter. The Award ID is required to complete the SCF.
3. Enter the student’s start date. (This is the student’s first day at your school.)
   a. Note: The student’s start date must be equal to or later than the school’s start date as listed on the tuition and fees chart.
4. Enter the annual tuition and fees for the student. If the student receives a discount (i.e. parishioner rate or sibling discount), enter the actual amount the student is charged.
   a. Note: The student’s tuition and fees must be less than or equal to the school’s overall published Tuition and Fees for that grade level.
5. Carefully read and acknowledge each statement by checking the certification boxes. On each SCF you will certify the following:
   a. I certify that the student’s grade level is correctly stated.
   b. I certify that the student is not receiving funding from a McKay Scholarship program.
   c. I certify that this student is physically attending school full-time and is not in any type of home school program.
   d. I certify that a standardized test will be administered and the student's scores (3rd through 10th grade only) will be provided to the Department of Education as required by law.
   e. I understand that I must submit an Exit Confirmation Form (ECF) to Step Up For Students within five (5) business days of the student's withdrawal in order to receive a final payment for the child and to not compromise his/her eligibility in future years. In cases where an overpayment occurred, the private school should expect to receive an invoice from our Finance department for any funds paid after the student’s exit date.
f. I certify that this school has completed the annual Department of Education private school compliance requirements and is compliant for [current] school year.

g. I certify that this school agrees to abide by all Step Up For Students scholarship administration policies and procedures.

h. I acknowledge that payments by Step Up For Students are strictly contingent upon 1) the school and family meeting and maintaining the conditions of eligibility; 2) the family remaining current on all fees and additional tuition payments; 3) the child maintaining compliance with this school's attendance policy.

i. I agree to report of the default of school or parent eligibility to Step Up For Students and provide access to supporting documentation for audit purposes.

6. Review entire SCF, carefully checking the:
   a. grade level,
   b. start date and
   c. tuition and fee amounts.

7. Click “Print” if you need a copy.

8. Click “Submit SCF”.

IMPORTANT: You will not be able to edit a previously submitted SCF.
School Commitment Form (SCF) Tips:
If a student’s grade level needs to be changed, please contact your Service Ambassador. Changes may require submission of supporting documents.

IMPORTANT: To avoid payment issues, please confirm your school’s tuition and fees AND SCF’s are entered correctly. These forms directly connect to Step Up’s accounting system, and it is your school’s responsibility to ensure all information is accurate.

Scholarships are paid to the school on a quarterly basis. If a student attended a school for a minimum of 10 days, the school would receive the full quarter’s tuition.

Please keep in mind that students need to have an SCF submitted by the following dates to qualify for that quarter’s payment:
Quarter 1: August 1, 2021
Quarter 2: October 1, 2021
Quarter 3: January 1, 2022
Quarter 4: March 1, 2022

When an SCF is submitted, our system will calculate the payment based on the student’s funding start date determined by the latest of the following four factors:

- the date of the student’s scholarship award
- the student’s first day of attendance at the school
- the date the school became compliant with the Florida DOE.

To view a student’s payment allocation amount, click on “Student Info” tab, then on “Confirm Enrollment”, and then double click the student’s name.

**Note:** Submission of SCFs or changes to SCFs and ECFs (discussed next) cannot be made during an open verification window timeframe.

How to withdraw a student

When a student withdraws from an eligible participating private school during the academic year, a digital Exit Confirmation Form (ECF) must be completed and submitted within FIVE (5) business days of the student’s withdrawal. This is done by accessing the school’s secured login. When completing this digital form, please provide as much information as possible. The student’s last day of class is the last date the student physically attended the school, regardless of withdrawal notification date from the parent.

The ECF asks questions related to outstanding balances owed to the school by the parent and student’s behavior.

If there is an outstanding balance at the time of the withdrawal, please indicate this information on the ECF. Only the balance related to tuition and or fees for that academic year for that individual student should be indicated on the ECF. A family balance should be divided by the number of children attending the school and the individual amount due entered on each student’s ECF.

If a student is being withdrawn due to expulsion, please indicate this information on the ECF. Balances may not be listed on the ECF for the following reasons: prior years’ balances owed, future scholarship checks or before/after school care fees.

Step Up for Students will **not** hold a request to transfer the student’s scholarship to another eligible, participating private school due to an outstanding balance. **Step Up for Students will not mediate issues related to outstanding balances for either the school or the parent.** Any issues related to outstanding balances are strictly between the parent and the school.

After logging into your school’s SAS account, the “Withdraw Student” section, found within the “Student Info” tab, allows you to complete an **Exit Confirmation Form (ECF)** for students who never attended or stopped attending your school. If a student has stopped attending your school after an SCF has been submitted and ECF is **required**.
**Withdrawing a student that never attended your school:**
If withdrawing a student who never attended your school, the student’s start date and end date must be the same as the school’s start date for the academic year.

**Withdrawing a student who did attend your school:**
If withdrawing a student who did attend your school, enter the last date the student physically attended, not the date the parent notified you. If the student attended your school for a minimum of 10 days during that quarter, your school will receive the full payment for that quarter. If the student attended less than 10 days for that quarter, your school will not receive a payment for that quarter. If an overpayment was made an adjustment will be made in the next quarter’s distribution.

**Exit Confirmation Form (ECF):**

![Exit Confirmation Form](image)
Important:

- An ECF is not necessary if the school year has concluded.

- If you need to revise a student's School Commitment Form (SCF), please do not complete an ECF. Contact a Service Ambassador for assistance.

- The “Outstanding Balance” field on the ECF is for informational purposes only and will not prevent the student from enrolling in another school.

Note: Submission of SCFs or changes to SCFs and ECFs cannot be made when a Verification Report is taking place.

Scholarship funds when an ECF is submitted
When Step Up for Students receives an ECF, calculations will be made to determine if additional scholarship funds are due to the eligible, participating private school or if funds are owed to Step Up for Students.
If scholarship funds are due to the school, those funds will be included in the next scheduled payment distribution. If money is due to Step Up for Students, the adjustment will be made to the ACF payment to the school for the next scheduled distribution.

If, due to extenuating circumstances a repayment schedule is established, failure to submit payment by the agreed-upon repayment schedule may result in the suspension of funding from Step Up For Students.

**Student Transfers**

The Florida Tax Credit Scholarship may be transferred to another eligible, participating private school throughout the academic year.

To transfer the scholarship, the current eligible participating private school must withdraw the student (see Exit Confirmation Form for more information). After the ECF has been received by Step Up For Students, the new school will be required to submit an SCF for the student (see School Commitment Form for more information).

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

**Confirm enrollment**

The “Confirm Enrollment” section lists the students who you have submitted School Commitment Forms (SCF) for in the current school year. Here you can reconcile your Step Up For Students student roster against your internal school roster to ensure all scholarship students are listed.

We strongly encourage you do this at least one week prior to each quarterly Verification Report period.

- If a child is missing, please submit their SCF immediately. Remember, the SCF is due to Step Up For Students 30 days before the next scheduled payment in order for that student to be included in that quarter’s payment. Also remember that SCFs cannot be added during an open Verification Report period.

Please refer back to these deadlines when confirming enrollment.

**What to check when reconciling roster:**

1. all FTC scholarship students are listed on the roster
2. the student’s grade level
3. the student’s funding start date
4. the total student payment amount
5. tuition and fees (click on student to view)
Notes:

If any students have withdrawn but are listed on the ‘Confirm Enrollment’ page, please submit their Exit Confirmation Form (ECF).

If information is incorrect, notify a Service Ambassador immediately.

How are scholarship payments made?

Scholarship payments are made directly to the school’s business bank account via Automated Clearing House (ACH). Only the parent/guardian listed on the student’s scholarship application are authorized to approve scholarship payments through their online login for the payments to be released. All scholarship payments require approval before a payment can be made. No entity or individual associated with the private school may be designated by the parent to approve a scholarship payment.

To make sure the school receives on-time payments the following instructions must be followed:

- Log into your Step Up For Students account. Click on the "School Info" tab and then on "Tax & Bank Information".
  - Please note: Bank account information must be for your school's business account – this will be validated before payments are made.
- If the bank account information has not changed, then you do not need to do anything.
- If you need to update the bank account details, please click the pencil icon within the “Financial Institution Information” section, enter the new information and then click the save icon.
  - Upload a new copy of your school’s voided check that matches the new bank account details. To upload the voided check, follow the instructions below
    - clicking the pencil icon within the “Tax Information” section,
    - clicking Choose File followed by
• clicking *Upload Documents* once you have selected the document and finally
clicking the *save* icon. Once you have done this, you do not need to do anything else.

• If you **have not previously submitted** your banking information, please upload your W-9 and add your banking information by following these steps:
  o Start in the “*Tax Information*” section by selecting your *Tax ID Type* from the drop down and then entering your Tax ID number. Then click *Choose File*, select your W-9 and then click *Upload Documents* followed by clicking the *save* icon.
  o Move to the “*Financial Institution Information*” section and enter your school’s banking information and then click the *save* icon.

Payments are made on Fridays during the payment period. If a parent approves payment before 11:59 p.m. ET on the Thursday before a payment, the student will be included in the ACH payment the following day. This will continue through the final ACH payment for the distribution period.

• Step Up For Students will send continuous reminders to parents/guardians who have not yet approved their student’s payment.
• Scholarship funds may take two business days from the dates of initiation listed above to be reflected in your school’s bank account.
• Your school will be emailed a remittance advice advising which students are included in that week’s ACH payment.

Helpful Tip: You can cross-reference your distribution Verification Report against ACH remittance advices to identify which of your students are still awaiting payment approval.

**Verification Report (VR):**
Prior to each scholarship payment, schools are required to verify their scholarship students by completing and submitting an electronic Verification Report (VR).

The VR is available through the School Login, on the “Verification Report” tab. This report displays all students eligible to receive a payment in the upcoming distribution.

If a scholarship student at your school is not shown on this report, they are not receiving a payment for that distribution.

The Verification Report must be completed during the verification window, typically 5 days, in order for the school to receive payment. (Verification Report dates can be found on the Payment Distribution Schedule.)

**Please note:** If your school does not complete your Verification Report during the specified verification window, your students’ payments will not be available in that payment distribution. These payments will be available in the next scheduled distribution for payment.
How to complete the Verification Report:

1. When you access the School Login during the pre-determined Verification Window, you will be taken directly to the Verification Report upon logging in.

2. Confirm that all FTC students enrolled at your school are listed on the Verification Report and ensure all students have the correct:
   a. grade level
   b. funding start date
   c. end date (if applicable) AND
   d. payment amount

3. Answer two questions for each student that has enrolled/withdrawn at your school in the last quarter. Both questions for all students must be answered to submit your VR.

   NOTE: The question related to the student’s attendance is to be answered related to if the student is meeting the school’s attendance requirements. If a student has missed a few days for illness or because of a family situation, this should not be a ‘No’ answer.

   4. Once you have completed the VR, click “SAVE” at the bottom of the page.

   5. Certify the Verification Report. (Your VR has not been submitted until the ‘Certification’ step is complete.)

REMINDER: At least one week prior to the Verification Report, we recommend you visit the “Confirm Enrollment” section of the “Student Info” tab to reconcile your Step Up student roster against your internal school roster to ensure all scholarship students are listed.
Parent approval of payments:
Parents or guardians will receive quarterly notifications when there is a payment to approve. Parents/guardians will need to follow the steps outlined in the communication they receive in order for the payments to be made to the school on time.

Surveys
Step Up For Students requires schools to complete an Enrollment Survey and Graduation Survey (if applicable) each year. These surveys are used for research purposes only to demonstrate program success. Individual school and student information is not released.

The Enrollment Survey
The Enrollment Survey captures school’s current enrollment numbers for each grade level offered. The survey contains three columns: Grade Level, Scholarship Students and Total Students.

- “Scholarship Students” will list the number of FTC Scholarship students per grade that you have enrolled through Step Up For Students. If the number is incorrect because you have FTC students enrolled through another scholarship funding organization, as well, please click the pencil icon to modify and enter the correct number.
• In the “Total Students” box, please enter your school’s total enrollment for each grade level. This is a combination of your scholarship and non-scholarship students.

The Graduation Survey
Schools are required to complete the Graduation Survey for any 11th or 12th grade Florida Tax Credit students that graduated that academic year.

The survey is available for one month at the end of each academic year. Schools will be notified when it becomes available.

Example of questions:

• Did they graduate?
• Are they going to college? Where?
• Did the student receive a Bright Futures Scholarship?

Scholarship Recipient Obligations
Student Attendance
Students must abide by the attendance policy of the eligible, participating private school in which they are enrolled. Failure to do so may result in a loss of scholarship. Should extenuating circumstances exist that cause a student to be absent for an excessive number of days, during which no education is being provided to the student by the school, the school should submit an Exit Confirmation Form (ECF) for this
student. Once the student has returned to the eligible, participating private school, a School Commitment Form (SCF) should be submitted to re activate scholarship funding.

If the circumstances surrounding the student’s absence are unique, please contact a Service Ambassador for additional guidance.

**Discipline**
Students and families must abide by the behavioral and disciplinary policies of the eligible, participating private school in which the student is enrolled. Failure to do so may result in loss of scholarship. An eligible, participating private school reserves the right to suspend or expel students if its published policies are not followed. If a student, over the course of his/her academic career as a Step Up for Students Scholarship recipient, is expelled from an eligible, participating private school three (3) times, s/he will lose the scholarship permanently; with no option to renew (this will not affect the scholarship of any siblings).

For more information or for specific questions, please contact a Service Ambassador.

**Parent’s Financial Obligation**
If the cost to attend an eligible, participating private school exceeds the student’s funding amount for that academic year, the parent is responsible for the difference. If a student withdraws from a school and has an outstanding balance, the school should indicate the balance on the student’s ECF. If the balance is for an individual student, the balance should be indicated on the individual student’s ECF.

If there is a family balance, divide the balance by the number of children and enter the amount on each student’s ECF.

Please contact a Service Ambassador with any questions regarding financial obligations.

Step Up for Students will NOT mediate outstanding balances. An outstanding balance and the collection of the debt is between the school and the parent.

**Resources:**

The Student Learning and Partner Success department exists to engage, equip, and empower educational partners to support student success. SLPS offers timely updates through our Bulletin Board, develops connections to available high-quality resources and networking opportunities, and connects schools to professional learning opportunities. We build a support base of school stakeholders, educate them about scholarships, and train them to participate in advocacy so that they can be activated when needed. SLPS is committed to supporting and building relationships with our educational partners.
Click here to find your area Step Up Coordinator.

Marketing tools
The “Marketing Toolkit” tab on the Step Up For Students website (https://www.stepupforstudents.org/marketing-toolkit/) provides helpful resources to market your school and the Step Up For Students Scholarship program. From Step Up’s Marketing Toolkit, you can:

- download flyers or request printed flyers
- request one free outdoor banner (or purchase additional)
- view and download Step Up TV and Radio PSAs
- request to purchase indoor retractable banners
- download a web banner for your website
- review and copy social media posts
- view marketing tips

Adding information about Step Up For Students to your website allows families to learn of the scholarship program and financial assistance available.

A web banner alleviates the need to update information from one year to the next. We recommend adding either of the following statements along with web banners:

- We Accept Step Up For Students Scholarship Recipients.
- (School Name) Accepts Step Up For Students Scholarship Recipients.

You’re welcome to use the Step Up Students logo on your website and collateral. We ask that you allow us to review the materials prior to using them. Reach out to us at Marketing@sufs.org.

The Step Up for Students School Handbook is considered a living document, and is subject to change at our discretion. You may familiarize yourself with updates by occasionally checking our website at www.stepupforstudents.org for any updates.

Provider Relations Contact Information
The Provider Relations Department has a team of Service Ambassadors that can assist you with your questions and/or concerns.

Service Ambassadors - Enrollment@sufs.org, calling 877-735-7837

Manager of Provider Relations - Nichelle Meadows - nmeadows@sufs.org