



STEP UP FOR STUDENTS

Helping students achieve more than ever before through private scholarship funding.



SCHOOL HANDBOOK

2018-2019 Academic Year

**A guide to the
Florida Tax Credit Scholarship**

Compiled by Step Up for Students
The Scholarship Funding Organization serving all 67 Florida counties

Step Up for Students Program Overview

Step Up for Students was created to help alleviate the enormous educational challenges faced by children in Florida who live in or near poverty. The program provides Tax Credit Scholarships to students in grades K-12 who come from low-income families. These scholarships allow the students to consider an eligible, participating private school or an out-of-district public school that may better suit their individual needs, an option which already is available to families of greater financial means. This choice is not based on whether the public school is judged as succeeding or failing. Rather, it recognizes that different children learn in different ways and that our collective struggle is to help the students who often are at the greatest disadvantage in modern education.

Provider Relations Contact Information

The Provider Relations Department has a team of Service Ambassadors that can assist you with your questions and/or concerns. They can be reached by emailing: Enrollment@sufs.org, calling 877-735-7837 or faxing 813-862-2325.

Participating School Obligations and Responsibilities

Participating School Eligibility

In order to accept students who receive 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, click [here](#).

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](#). For questions related to Florida DOE compliance requirements or deadlines, you may contact your DOE regional manager by calling 800.447.1636. A listing of regional managers can be found [here](#).

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

Submission of Schools' Tuition and Fees

Prior to submitting scholarship student information to Step Up for Student for funding, tuition and fees must be reported to Step Up for Students. This is a two-part process.

The first step is to electronically submit tuition and fee information via the secured school login available on the Step Up for Students website [here](#).

The second step is to submit a copy of the *published* Tuition and Fee Schedule for the academic year. The name of the school and the four-digit DOE number are required on the fee schedule to ensure accurate recording of this information.

While there is no deadline for completing this process, you will not be able to register Step Up students

until this is completed. Failure to complete BOTH steps in a timely manner will result in delay of payment. **Please do not send a printed copy of the electronic Fee Schedule.**

If a change to the school's start date or the submitted tuition and fee information is necessary, these changes MUST be completed BEFORE the first verification window opens for the academic year. [Please notify a Step Up For Students Service Ambassador if ANY changes need to be made to previously submitted tuition/fee information, or school start dates. DO NOT attempt to correct this information without first speaking to a Step Up For Students Service Ambassador.](#)

A schedule of the Verification Windows for the academic year will be provided prior to the beginning of the school year. [The schedule is on the Step Up For Students website and may also be viewed here.](#)

Norm Referenced Testing

All eligible, participating private schools are required to annually administer a state-approved norm-referenced standardized test to Florida Tax Credit scholarship recipients in grades 3 through 10. A list of state-approved exams can be found [here](#). Copies of the score sheets with the student's name, testing date, and national percentile ranking must be sent to The Learning Systems Institute at Florida State University no later than August 15 of each year. The Learning Systems will collect and evaluate test scores per Florida statute s1002.395.

Financial Reporting

[Eligible, participating private schools who receive more than \\$250,000 in aggregate scholarship dollars from Florida Tax Credit Scholarship, the Gardner Scholarship, the John M. McKay Scholarship for Students with Disabilities and the Hope Scholarship during an academic year are required by Florida s1002.395 to annually contract with an independent certified public accountant to perform the agreed-upon procedures. A report of the findings must be submitted to Step Up for Students at the address below, no later than September 15 of each year.](#)

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

[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. The current guidelines may be found here. For questions regarding the Financial Reporting requirement, please contact a Service Ambassador or email your questions to \[AUP@sufs.org\]\(mailto:AUP@sufs.org\).](#)

Graduation Survey

Eligible, participating private schools are required to complete a graduation survey for all 11th or 12th grade Step Up for Students scholarship recipients who attended the school during the academic year and have graduated.

The graduation survey will be accessible through the school's secured login via the Step Up for Students' website. The dates the survey is available will be provided in advance. For questions regarding the

Graduation Survey, please contact our Service Ambassadors.

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 track student enrollment, student withdrawal and scholarship payments.

Online Tools

Accessible through the school's secured login are online tools created to assist eligible, participating private schools in completing functions required to validate scholarship students and in gathering information about returning students' scholarship applications.

To access the login, click [here](#). For assistance accessing your secured school login, please contact a Service Ambassador.

Scholarship Eligibility and Funding

Scholarship eligibility is based on the student's household income. To see a chart of the income guidelines, click [here](#).

Families are notified via email if they are found eligible. 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.

Schools MUST NOT request access to or obtain the parent/guardian's information in order 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.

Scholarship funds may be used toward the following private school fees and are allocated in the order listed below until the maximum award is reached, or until all fees are satisfied:

- Tuition
- Books sold through the school (e.g. textbooks, workbooks, etc.)
- Registration
- Transportation services that occur during regular 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)

Fees paid to a third-party vendor (including books and uniforms) will not be covered by the Florida Tax Credit Scholarship.

The student's funding is based on the **latest** of the following four factors:

- the date of the student's scholarship award;
- the school's first day of the academic year;
- the student's first day of attendance at the school;
- or the date the school became compliant with the Florida DOE.

Scholarships are paid using a daily rate based on a 200-day academic year. The daily rate is calculated by taking the maximum award amount for the student OR the amount needed to satisfy the student's fees, **whichever is less**, divided by 200. Amounts extending to three or more decimal places are rounded in accordance with rounding rules used in the banking and finance industry. For questions regarding scholarship funding and award letters, please contact a Service Ambassador.

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.

Application Process

Applications for the Florida Tax Credit Scholarship are digital and are available via the Step up for Students website. There is no fee to apply.

Eligible students will fall into one of the following categories:

- Renewal – a student who attended an eligible, participating private school and received funding for at least one day during the previous academic year.
- Add-on - a new student being considered for a scholarship who is the sibling of a renewal student.
- New – a student who has never been received scholarship funds or who did not receive scholarship funds in the previous academic year.

To qualify for the scholarship, the following requirements must be met:

- A student entering kindergarten must be at least five years old on or before September 1st of the academic year being applied for.
- A student entering first grade must be at least six years old on or before September 1st of the academic year being applied for.
- All families, regardless of student type, must meet the income guidelines found [here](#).

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.](#)

Schools should NOT complete or submit applications for families.

Schools MUST NOT request access to or obtain the parent/guardian's information in order 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.

School Commitment Form

To register a Step Up for Students scholarship recipient attending your school in the Step Up system, you must complete and electronically submit a School Commitment Form (SCF). This digital form may be accessed through your secured login via the Step Up for Students website, [or by clicking here](#).

To complete the SCF the student's Award ID, also known as the Unique Identifier, is required. This number is found on student's award letter.

By completing this form the school and the parent are confirming the student's enrollment and are authorizing Step Up for Students to distribute scholarship funds to that school for the student.

Discounted Fees

Discounted fees are discounts the school offers to a qualifying student or family (e.g multi-sibling discount or parishioner discount). Regardless of the method of payment (scholarship or private pay), any discount should be applied to all students. Discounts for Florida Tax Credit scholarship recipients should be applied on the digital School Commitment Form. If you need assistance with this information, contact a Service Ambassador.

Example:

The school offers an **affiliation discount, such as parishioner, church or temple member**, an **employee discount** and/or **multi-sibling discount of \$800** off the tuition. The non-discounted tuition amount for all students is \$6,000.00. Below is an example of how this information should be entered on the School Commitment Form.

Student Tuition: \$5,200 (which is \$6000 minus the \$800 discount)

Failure to submit the SCF in a timely manner will result in delay of scholarship funds for the student. All approved students will have an award letter. If you have questions regarding the School Commitment Form or how to complete it, please contact a Service Ambassador.

Do not accept a student without an Award Letter. Doing so indicates the school is assuming full responsibility for the student's tuition.

Exit Confirmation Form

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 via the Step Up. 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. (See Financial Obligation for more information)

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. The Step Up for Students form letter previously provided for this purpose will no longer be valid and should not be utilized in any way.

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, an invoice will be sent to the school and payment is due upon receipt.

In the event the repayment of invoiced amount presents a financial challenge for the eligible, participating school, a payment plan may be negotiated.

Failure to submit payment for invoices by the deadline and/or the agreed-upon payment plan 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).

Funding for transferring students is determined for each school attended based on the student's funding start date and the days the student was in attendance. The total for the academic year may not exceed the student's maximum funding amount.

Do not accept a student without an Award Letter. Doing so indicates the school is assuming full responsibility for the student's tuition.

Step Up for Students Scholarship funds are distributed in four (4) payments per academic year. Prior to the start of the academic year schools will be provided with a Payment Distribution Schedule listing the dates of the four (4) payments. [To see the current distribution schedule, click here.](#) Scholarship payments are mailed to the school's physical address on file with the Florida Department of Education.

Prior to receiving scholarship funds four times each academic year, schools are required to verify their

scholarship students by completing and submitting an electronic Verification Report (VR). [Once activated the electronic Verification Report is available through the school's secured login or by clicking here.](#)

The VR is a listing of each student for whom a payment is due in the current scholarship distribution. Questions related to each student's attendance are part of the VR. The school will confirm the student's continuous attendance (defined as having been absent less than five (5) consecutive days since the last VR) and confirm the student is currently attending the school.

The VR is open for a seven-day period, known as the verification window, prior to each distribution. **To receive payment on the scheduled distribution date, the school must electronically submit the completed VR BEFORE the verification window closes. Failure to meet this deadline will result in delayed payment.** The dates of the verification windows are published on the Payment Distribution Schedule provided to schools prior to the beginning of each academic year.

The school will receive one scholarship check per verified student. Parents and schools must abide by the Step Up for Students Check Cashing Policy, included with each check package. A copy is in the addendum of this handbook.

For questions regarding the student verification process, scholarship distribution, or the check cashing policy, please contact a Service Ambassador.

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 amount 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 reactivate scholarship funding. If the circumstances surrounding the student's absence are unique, please contact a Service Ambassador for additional guidance. For detailed information on the requirement for eligible, participating private schools click [here](#).

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.

Scholarship Payments

Scholarship funds are made payable to the parent AND the eligible, participating private school and are distributed via check the eligible, participating private school in four (4) installments throughout the academic year. The parent or guardian to whom the check is made payable must endorse the check upon

notification by the eligible, participating private school. Failure to endorse a scholarship check in a timely manner could result in the loss of scholarship and/or an outstanding balance at the eligible, participating private school.

The eligible, participating private school, or any entity related to it, may not be assigned as a Power of Attorney for any purpose related to a Step Up for Students Scholarship. Circumstance may arise where Step Up for Students may accept a properly executed Power of Attorney for the purposes of endorsing scholarship checks, but only after approval by Step Up for Students. If such a situation arises please contact a Service Ambassador for further instructions.

Under no circumstances should an eligible, private school endorse scholarship checks on behalf of the parent/guardian or deposit unsigned scholarship checks. Doing so may result in revocation of scholarship participation.

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.

Scholarship checks require a parent signature to be deposited. If the parent does not, or will not, sign the scholarship check, the scholarship check must be returned to Step Up for Students.

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.

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.