

**Help is Here!**

**FLORIDA TAX CREDIT SCHOLARSHIP**  
PARENT HANDBOOK



**Florida Tax Credit Scholarship Parent Handbook  
2021-2022 Academic Year  
Compiled by Step Up for Students**

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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.

## Scholarship Eligibility and Application

### Eligibility Requirements

Contingent upon available funds, and on a first come, first-served basis a student must meet the eligibility criteria and household income requirements to qualify for the Florida Tax Credit Scholarship (FTC)

### Student Eligibility Criteria

- 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<sup>st</sup>
- If the student is entering first grade s/he must be six years old on or before September 1<sup>st</sup>
- Prohibitions: 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.

### Household Income Eligibility Criteria

In order to qualify for a Florida Tax Credit Scholarship, a family of four must make \$99,375 or less per year. Please see chart below for different household sizes.

## 2021-2022 School Year

Household Size	Annual Maximum Gross Income Cap
1	\$ 48,300
2	\$ 65,325
3	\$ 82,350
4	\$ 99,375
5	\$ 116,400
6	\$ 133,425
7	\$ 150,450
8	\$ 167,475
9	\$ 184,500
10	\$ 201,525
11	\$ 218,550
12	\$ 235,575
13	\$ 252,600

Go to [sufs.org](http://sufs.org) for scholarship information, additional household sizes and eligibility details.

Priority will be given to students whose household income for a family of four is at or below \$48,470 (185% of the federal poverty line).

The following students do not need to meet the household income requirements:

- A student who is currently placed, or during the previous state fiscal year was placed, in foster care or in out-of-home care
- Students who are homeless

All other families, regardless of student type, must meet the income guidelines in the initial eligibility year.

Any misrepresentation of the information provided to Step Up for Students for eligibility purposes will result in the revocation of the student's scholarship and could be punishable as a crime.

Examples of income include:

- Pay checks
- Cash wages
- Unemployment
- Social Security
- Income/Disability for every household member (including children)
- Child support
- Any other income

## Scholarship Continuity

Once a student qualifies for a scholarship based on household income, as long as the student is a resident of the state of Florida, the student remains eligible for the Florida Tax Credit Scholarship until he or she graduates from High School or turns 21, whichever occurs first, **regardless of income**.

Please note: Students who meet the requirements for both, the Florida Tax credit Scholarship and the Family Empowerment Scholarship, will be awarded a Family Empowerment Scholarship. If the funds are exhausted for the Family Empowerment Scholarship or the school the student is attending does not take the Family Empowerment Scholarship, the student will remain eligible for the Florida Tax Credit Scholarship. Please click here to see the Family Empowerment Scholarship Handbook.

## Student Categories

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.

## Apply for a Florida Tax Credit 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 required information and/or documents are received. Renewal students (those who used the scholarship the previous school year) are given processing priority until the published priority deadline has passed.

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.** Once a student is awarded, the parent/guardian will be able to access their student's award letter via their secured login.

**Please note: A participating school should not apply on behalf of a parent/guardian, 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.**

When you complete the Step Up for Students application, you are agreeing to or authorizing the following:

- You authorize Step Up for Students “to access information needed for income eligibility determination and verification held by other state or federal agencies, including the Department of Revenue, the Department of Children and Families, the Department of Education, the Department of Economic Opportunity, and the Agency for Health Care Administration.” s1002.385,7(g)
- You authorize Step Up for Students to share your contact information with organizations that want to provide you with information about parental empowerment, school choice and candidates for public office. Your consent or lack of consent will have no effect on scholarship eligibility.
- You authorize Step Up for Students to deliver prerecorded messages, including, but not limited to, application status updates and other pertinent scholarship information, to the home telephone numbers or the mobile telephone numbers that you provide in the scholarship application. You understand that you are not required to provide your consent as a condition of purchasing any goods or services, and that your consent or lack of consent will have no effect on scholarship eligibility.
- You authorize Step Up for Students to deliver text messages. In addition to any entry, submission, subscription, or other fee of which you are notarized, your carrier’s Messaging and Data rates may apply to your entry or submission message, our confirmation, and all subsequent SMS correspondence.

We will not be liable for any delays in the receipt of any SMS messages as delivery is subject to effective transmission from your network operator. SMS message services are provided on an as-is basis.

Data obtained from you in connection with this SMS service may include your cell phone number, your carrier’s name, and the date, time, and content of your messages. We may use this information to contact you and to provide the services you request from us.

If at any time now or in the future, you elect to cancel, you can unsubscribe by texting ‘STOP’ to 77453.

- You certify that the information presented is true and accurate to the best of your knowledge and belief. You understand that providing false representations constitutes an act of fraud. False, misleading, or incomplete information may result in the denial of the scholarship application or revocation of a scholarship award.

For more information on eligibility, please visit: <https://www.stepupforstudents.org/for-parents/income-based/frequently-asked-questions/>.

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.

## How to find an eligible private school?

Once a student has been approved for the scholarship, the next step is to select an eligible, participating private school. To find private schools that accept the Florida Tax Credit Scholarship [click here](#).

Once a private school has been selected, the parent/guardian may take the student's award letter to the private school. The award letter can be found by logging into the parent's portal by using their login. The award letter will allow the school to enroll a student through our system and begin scholarship payments.

A student's scholarship may be transferred to another eligible, participating private school during the school year if the student needs to change schools throughout the school year.

Please keep in mind that if a student is enrolled before an application has been received or prior to being found eligible the parent/guardian will be responsible for paying any tuition and fees due to the school. Awards are not guaranteed and are on a first-come, first-served basis.

## Transferring

One of the benefits of the Florida Tax Credit Scholarship is that it can be transferred. If you are not satisfied with the eligible, participating private school you have chosen, you may find another one.

Before you withdraw your student from the private school, you should notify the school and understand the school's policy regarding transferring to another school.

Step Up for Students will not transfer a scholarship until it has confirmation of the student's withdrawal from the school and notification from the new eligible, participating private school of the student's start date.

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/guardian. If the school has been overpaid the school will be invoiced for the overpayment.

Please allow five business days for the current school to withdraw your student. If the student has not been withdrawn after five business days, please contact Customer Service.

## Scholarship awards and what is covered:

The Florida Tax Credit Scholarship (FTC) maximum allowable award amounts are based on the county and grade of the student. The amounts for the upcoming school year are established when the Governor signs the state budget into law, typically by July 1st each year and published by Step Up For Students some time after July 1, once provided by the Florida Department of Education

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 an award amount. 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.**

## 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.



You must find an eligible, participating private school for your student as soon as you receive your scholarship award letter. Failure to do so could result in loss of the scholarship due to exhausted funds.

### Transportation Option

If the option to transport the student to another public school, the parent may receive a maximum scholarship of up to \$750, to assist with the cost of transportation to a school other than the one the student is assigned to.

If awarded a scholarship, the parent or guardian can email [FTCTransportation@sufs.org](mailto:FTCTransportation@sufs.org) to select the transportation option.

Please include in the email the following information:

- Student's full name
- Parent's full name
- The name of the public school the student is zoned for
- The name of the public school of choice the student will be attending

Parents will need to provide a report card on a quarterly basis to receive payment.

## Scholarship Payments:

Step Up For Students issues Florida Tax Credit Scholarship payments to schools electronically. This process takes place at least four times per school year and requires the parent/guardian to electronically verify their student's payment before Step Up For Students can release the student's scholarship funds to the school. Because timely payment of the student's scholarship is dependent the parent/guardian's approval, it is critical the parent/guardian maintains a current, active email address with Step Up For Students.

Parents or guardians will be notified when there is a payment to approve. Parents/guardians will need to follow the steps below to make sure payments are made to the school on time:

- Log in to their Step Up For Students account.
- Click on "Check the Status of an Application."
- Click on the link found within the red text to review their student's payment.
- Review, complete and submit the electronic form for their student's payment.

**Under no circumstances should an eligible, private school approve any scholarship payments on behalf of the parent/guardian. Doing so may result in revocation of scholarship participation.**

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

### Prorated Awards:

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

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

### 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 30 days before scholarship funds are sent to Step Up For Students. 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

## Student behavior and scholarship requirements:

Scholarship students must follow all academic and discipline policies of the private school they attend. Private schools have the right to expel or suspend students if their published policies are not followed. We recommend you carefully review those policies and procedures to ensure your children remains eligible for the scholarship. Step Up for Students does not govern private school policies regarding the retention of students due to academic or discipline failures.

We have found that some students need help in making the adjustment to a new private school environment. The courses may be more advanced and difficult. There may be more homework. The private school may have tougher enforcement of rules, stricter discipline procedures and less tolerance for unruly or disrespectful behavior. We urge parents to remain in constant contact with the private school, its counselors, and teachers, and to seek tutoring or mentoring services that might be available.

## Parent Responsibilities

- Parents must notify the public school district in which you live when you withdraw your child to participate in the program and enroll in an eligible private school.
- Parents are responsible for selecting a private school and applying for admission.
- Parents are responsible for taking their confirmed eligibility letter to the school they have selected as validation of the scholarship award.
- Any student participating must remain in attendance throughout the school year unless excused by the school for illness or other good cause.

- **The parent/guardian must approve each quarterly scholarship payment to deposit the funds to the school via ACH. There are no exceptions to this rule.**
  - **If a student attended the school, the parent must approve the payment, even if the parent is having issue with the school or is not happy with the service.**
  - **Parents that do not approve scholarship payments may jeopardize their student's scholarship.**
- Each parent and student has an obligation to the private school to comply with the school's published policies.
- Upon reasonable notice to the Department of Education and the school district, the parent may remove the student from the private school and place the student in a public school.
- Step Up For Students must be notified if the student is withdrawn from the private school.
- Parents must ensure that a student in grades 3-10 take a DOE approved, national, norm-referenced test or the statewide assessment.
- If you receive a Florida Tax Credit Scholarship during the 2020-21 school year, you must confirm your continuing participation in the program by the date established by Step Up For Students in order for your scholarship to remain in force.

## 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](#).

## Important Items to Note

- Parents must notify the public school district in which you live that your child will be participating in the program.
- Parents must notify the eligible, participating private school before withdrawing the student during the school year.
- Parents must notify Step Up for Students if you are moving, whether it is within the area or outside the area you currently reside in.
- Parents must keep a current, active email address on file with Step Up for Students.
- Step Up for Students does not govern private school policies regarding the retention of students due to academic or discipline failures.
- Parents must complete the renewal process within the deadline to be confirmed for the new school year.
- Please update your email server to accept email from Step Up For Students so it is not sent to your Spam or Junk folder.

## Actions that may lead to a loss of the scholarship

- Misrepresenting or withholding information on the scholarship application.
- Enrolling the child in a private school that is not eligible to participate.
- Failure to regularly attend the private school.
- Failure of the parent to approve quarterly scholarship payments.
- Failure of the student to take a required nationally norm-referenced test or the statewide assessment.

## Contact Information

If at any point you have a change of address, telephone, cell phone or E-mail address, you can update your information by logging into your account [here](#).

Our service center is available Monday through Friday from 8 a.m. – 5 p.m. ET. Please call us with your questions at 877-735-7837 or email us at [info@stepupforstudents.org](mailto:info@stepupforstudents.org).