



# FLORIDA TAX CREDIT SCHOLARSHIP

PARENT HANDBOOK





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## 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), which has two components, one for students with Unique Abilities (FES-UA) and a second for lower to middle income families and for students who meet other categorical requirements (FES-EO); the Hope Scholarship for students who are bullied or are victims of violence, and the **New Worlds Reading Scholarship Accounts Program (formerly Reading Scholarship Accounts Program) for public school students in kindergarten 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>.



- 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.

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.

### Household Income Eligibility Criteria

To qualify for a Florida Tax Credit Scholarship (FTC) based on income, a household's gross income must fall below the caps presented below. Household members include anyone who permanently resides at the residence.

Income-Based Scholarship Guidelines 2022-2023 School Year	
Household Size	Income-Based Scholarships Annual Maxim Gross Income Cap
1	\$ 54,360
2	\$ 73,240
3	\$ 92,120
4	\$ 111,000
5	\$ 129,880
6	\$ 148,760
7	\$ 167,640
8	\$ 186,520
9	\$ 205,400
10	\$ 224,280
11	\$ 243,160
12	\$ 262,040
13	\$ 280,920

Go to [sufs.org](https://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 \$51,337.50 (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.



Examples of income include:

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

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.

Please see [Appendix A](#) for a helpful checklist for new applications. You can also [click here](#) to watch a video on the documents you may need when completing the application.

## 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 for Educational Options (FES-EO), will be awarded FES-EO. If the funds are exhausted for the FES-EO or the school the student is attending does not take the Scholarship, the student will remain eligible for the Florida Tax Credit Scholarship. Contact [Customer Service](#) for additional information. Please click [here](#) to see the Family Empowerment Scholarship for Educational Options 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. **However, they must complete an Intent to Continue annually.**

- **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 (2021-22)
  - 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. **However, they must complete an Intent to Continue annually.**

### **Apply for a Florida Tax Credit Scholarship**

Families can apply online by clicking [here](#). 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. Students whose household income is at or below 185% of the Federal Poverty Line (for example, \$51,337.50 for a family of four) will also receive 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.** 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 click [here](#).

[Click here to watch a helpful video on the application process.](#)



## **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 [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 read below for more information on transferring a scholarship.

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 after July 1, once provided by the Florida Department of Education.

Scholarship award amounts for the 2022-23 school year can be found by [clicking here](#).

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 Family Empowerment Scholarship offers two options for eligible students. One option is for attendance at a participating K-12 private school and the other is for transportation to a public school other than the one to which 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, or New Worlds Reading scholarships).

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**

The parent may receive the greater of \$750 or the value of the local school district's per-pupil expenditure on transportation 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 request a Transportation Form via chat at [www.stepupforstudents.org](http://www.stepupforstudents.org), by phone at 877-735-7837, or by email at [info@sufs.org](mailto:info@sufs.org).

The following information is needed to complete the Transportation Form:

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



Parents will need to upload a report card or progress report from the student's school on a quarterly basis through their [Step Up For Students parent portal](#) to receive payment.

## **Scholarship Payments:**

### **Payment Eligibility**

After a student has been awarded a scholarship and the parent provides the award letter to the school, the school must enroll the student through the Step Up For Students school portal. In order for the student to be eligible for payment, the school has to complete this process by the following dates.

- September 1, enrollment deadline August 1
- November 1, enrollment deadline October 1
- February 1, enrollment deadline January 1
- April 1, enrollment deadline March 1

If there are any extenuating circumstances, the Florida Department of Education may consider making additional payments. In order for a student to be included in any additional payments, they must be enrolled 30 days before such payment is made.

### **Payment Approval**

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 three factors:

- the date of the student's scholarship award
- 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.

## **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 keep a current, active email address on file with Step Up For Students. Please update your email server to accept email from Step Up For Students so it is not sent to your Spam or Junk folder.
- Parents are responsible for selecting a private school, applying for admission, and enrolling the student.
- Parents must apply for a scholarship by a date established by the organization.



- Parents must notify the public school district in which they live when withdrawing the child to participate in the program.
- 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 school's attendance policy as listed in the school's handbook should be followed at all times.**
- **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 issues 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 have an obligation to the private school to comply with the school's published policies. Step Up For Students does not govern private school policies regarding the retention of students due to academic or discipline failures.
- 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.
- Parents must notify the eligible, participating private school before withdrawing the student during the school year.
- 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. Learn more about this requirement [here](#).
- 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.
- **If you receive a scholarship during the school year, you must confirm your continuing participation in the program by completing the Intent to Continue by the date established by Step Up For Students in order for your scholarship to remain in force for the following school year.**



## **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 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.

A copy of the requirements can be found [here](#).

## **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.
- Moving out of the state of Florida.
- Returning to a public school or utilizing another statewide scholarship.



## Useful Links

### Websites

- [Document Library for Applicants](#)
- [Find a School Tool](#)
- [FTC Scholarship Frequently Asked Questions](#)
- [FTC Scholarship Program Facts](#)

### Videos

- [Documents Needed to Apply for an FTC/FES-EO Scholarship](#)
- [How to Apply for an FES-UA Sibling](#)
- [How to Apply for an FTC/FES-EO Scholarship](#)
- [How to Create a Step Up For Students FTC/FES-EO Account](#)

## 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. – 6:30 p.m. ET. If you have any questions or need assistance, you may contact us via chat at [www.stepupforstudents.org](http://www.stepupforstudents.org), call us at 877-735-7837, or email us at [info@stepupforstudents.org](mailto:info@stepupforstudents.org).



When Step Up For Students is accepting applications for the income-based scholarship, families must complete an online application AND submit the required supporting documentation. The documents needed will vary from one application to the next depending on each family's situation. However, the following documents are ones that are typically requested. Please keep in mind that you may be requested to submit additional documents depending on your situation.

## **Proof of residency for each member of the household**

Required for each household member over 18 years old

- Must include the household member's name and address.
- Acceptable proof of residency may include: Driver's license, utility bill (electric, water, gas, garbage/sewer or landline), paystub including the address, insurance policy (e.g. auto, home, health), federal/public assistance eligibility letter (e.g. food assistance, TANF)
  - Driver's license must include the following:
    - Parent's full name
    - Florida address
    - Current as of the scholarship application submission date
    - Issued on or after January 1, 2010

## **Income verification**

Any income received by any adult or minor household member on a regular basis must be verified.

- Paystubs must be dated 30 consecutive days for the month you are submitting your application or the month prior and must include the name of the household member, the employer's name, the dates of the pay period, and gross income (i.e., before taxes and deductions).
- Cash wages require a letter from the employer validating gross annual income
- If you are an independent contractor, business owner, or are self-employed, the prior year's tax return with all schedules (A-F), W-2's, and 1099's is needed. If you have not yet filed your tax return, please submit all W-2's, 1099's, tax extension documentation, and the profit and loss statement for the month you are submitting the application or the month prior.
- Any other income must be disclosed along with the corresponding supporting documentation:
  - Adoption benefits: adoption benefit paperwork
  - Alimony: Divorce decree
  - Annuities or net royalties: prior year's IRS Schedule D AND prior year's 1099
  - Benefits/grants paid in cash: Letter from person or place providing benefit
  - Child support documentation requires 1 of the following: DCF statement, divorce decree, cancelled check, letter from non-custodial parent, or bank statement



- Dividend income: Prior year's 1099, prior year's IRS Schedule A, AND prior year's IRS Schedule B
  - Food Distribution on Indian Reservations benefits - FDPIR documentation
  - Financial assistance received from church, family members, or friends: Letter from the church, family, or friend
  - Foster or out of home care income designated specifically for use of student in foster or out of home care: Document for personal income
  - Pension, retirement, or VA income requires 1 of the following: SSI benefit statement, VA statement, or 1099 pension form
  - Rental income: P&L statement or last year's tax return with schedules
  - Rent income from roommate that pays rent: Cancelled check or cash receipts
  - Savings/withdrawals as primary source of income: bank statement
  - Social security or disability income in their name or from children or dependents: SSI benefit statement OR most recent Social Security Award Letter
  - Supplemental Nutrition Assistance Program benefits – SNAP documentation
  - Supplemental Security Income: SSI benefit statement OR most recent Social Security Award Letter
  - Temporary Assistance for Needy Families benefits -TANF documentation
- 
- Divorce documentation, if applicable**  
Complete divorce decree, including all pages, signatures, stamps, and/or seals, marital settlement agreement, and parenting plan
  
  - FES-UA sibling's student ID #, if applicable**  
FES-UA sibling's student ID #, found in the student info section of the FES-UA portal
  
  - Foster Care documentation, if applicable**  
Foster parent license AND child's placement papers
  
  - Law Enforcement Officer verification documentation, if applicable**  
Copy of law enforcement officer's official ID
  
  - U.S. Armed Forces verification documentation, if applicable**  
Leave and Earnings Statement (LES) of the active-duty military parent
  
  - Out of Home Care documentation, if applicable**  
Court order OR child's placement papers

If you have any questions or need assistance, we are here to help. You may contact us via chat at [www.stepupforstudents.org](http://www.stepupforstudents.org), email us at [info@stepupforstudents.org](mailto:info@stepupforstudents.org), or you may call our contact center at 1-877-735-7837 Monday through Friday 8:00 a.m.- 6:30 p.m. ET.