

Step Up for Students | Personalized Education Program (PEP) and Unique Abilities (UA)

Reimbursement Submission Guide for The Regent Academy

Created by TRA parent Mary Tindall. Updated May 2025.

PART 1: Complete the invoice template

1. Complete The Regent Academy invoice template. Fill out one template per student, per class.
 - a. Make a new copy of the file (do not use the master file).
 - b. Include the student's full name, class name, instructor's full name, date of instruction, tuition amount, consumable materials fee (if any) and method of payment.
 - c. **At the bottom, include the payment date and the name of the teacher you paid.** The name on the invoice MUST match the name on your check, Venmo screenshot, etc.
2. Download and save the file as a PDF.

Example of completed invoice



| | | |
|---|--------------------------|-------|
| Student's full name: | Jacob Tindall | |
| Class/Type of instruction: | Biology class | |
| Instructor's full name: | Amber Kest | |
| Date(s) of instruction: | January 7–April 30, 2025 | |
| Tuition amount due: | \$200 | |
| <input type="checkbox"/> Tuition paid in full | Method of payment: | Venmo |
| Consumable materials fee: | | |

Paid via Venmo to Amber Kest
1/3/2025

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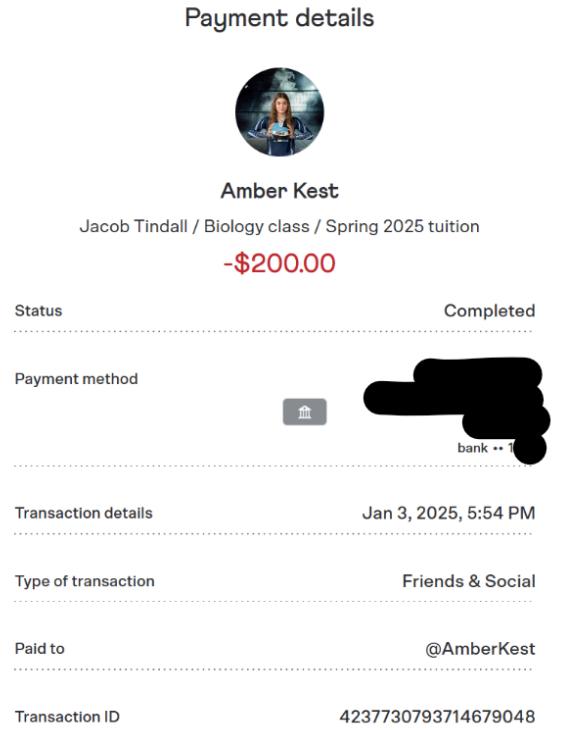
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PART 2: Collect proof of payment

1. Download your proof of payment: e.g., check, Venmo screenshot, PayPal receipt:
 - a. **Check:** Images of front and back of *deposited* check. You can find this in your bank account after your teacher deposits it.
 - b. **Venmo:** Screenshot of detailed transaction showing the payment method (bank account, credit card, etc.). You can find this under your monthly transaction history. Do *not* use the transaction listing that shows up in your payment feed, which doesn't include all the information you need.
 - c. **PayPal:** PDF or screenshot of transaction from your PayPal account.
2. Make sure your proof of payment includes the following information, which should match *exactly* with the information you submit on your invoice:
 - a. Student's full name
 - b. Name of teacher you paid
 - c. Date of payment
 - d. Date(s) of instruction
 - e. Class name
 - f. Payment method, if submitting a PayPal or Venmo transaction (must include last 4 digits of credit card or bank account number)

Example of Venmo screenshot, at right



PART 3: Submit a reimbursement request

1. Log in to Education Market Assistant at
<https://apply.stepupforstudents.org/>
2. On left hand navigation bar, select “Reimbursements” →
3. Click the dropdown menu and select your student’s name.
Upload the completed invoice for the payment you wish to have reimbursed.
4. On the next screen, enter the following fields:
 - a. **Purchase date:** The date you sent payment
 - b. **Category:** Home Education Instructional Program
Tuition & Fees (The categories changed in the 2024–2025 school year. Make sure to select this one!)
 - c. **Type:** Tuition or fees
 - d. **Item amount:** The amount on your invoice
 - e. **Who did you pay?** Enter “Provider Not Listed” and then “The Regent Academy”
 - f. **Educational benefit:** Describe what you are submitting (e.g., Biology class tuition for The Regent Academy). Also in this field, specify which proof of payment is attached (Venmo, check, etc.).
5. Attach the proof of payment in the “Additional documents” section.
6. Optional: Include a course description from The Regent Academy website.



Dashboard

My Students

Marketplace

Reimbursements

Pre-Authorizations

Recent Transactions

Help

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Example of approved submission

| | | | |
|--|--|--------------------------|--------------------------------|
| REIMBURSEMENT #31416921 | TOTAL \$200.00 | STUDENT ID [REDACTED] | GUARDIAN Mary Tindall |
| | TRA INVOICE_JACOB-BIOLOGY-SPRING 2025.PDF DOWNLOAD | STUDENT Jacob Tindall | |
| <hr/> | | | |
| PURCHASE 1 | | | APPROVAL STATUS Paid |
| Spring semester tuition for biology class | | | |
| Purchase Date | 1/7/2025 | | |
| Invoice # | 0107202520298923 | | |
| Category ① | Home Education Instructional Program Tuition & Fees | | |
| Type | Tuition | | |
| Description | Spring semester tuition for biology class | | |
| Item Amount | \$200.00 | | |
| Who did you pay? | The Regent Academy | | |
| Educational Benefit ① | Biology class tuition for The Regent Academy. See attached Venmo receipt for proof of payment. | | |
| Additional Documents | Uploaded Documents: venmo receipt-jacob tindall-biology-spring 2025.png | | |

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Tips and troubleshooting

- **Pay all at once.** If your budget allows, it's much simpler to pay for a full school year or semester at a time (rather than making monthly payments). Paying all at once means you have fewer reimbursements to submit. This will save you a lot of time, especially if you have multiple children.
- **Submit reimbursement requests quickly.** If you have PEP for the current school year, you may submit a reimbursement request for items in the upcoming school year *immediately after you pay for them*.
 - Example: You can submit enrollment fees for Fall 2025 courses in Spring 2025. You don't need to wait for the new school year to start on July 1.
 - Note in your submission that you are paying in advance for fall courses.
- **Choose the right category.** It's important to categorize your classes as Home Education Instructional Program Tuition & Fees rather than Tutoring. If you select Tutoring, you will need to submit teacher credentials. As of May 2025, you do not need to submit teacher credentials for classes at The Regent Academy.
- **Push back on Step Up for Students (SUFS) as necessary.** If SUFS places your submission on hold and requests further documentation about the Home Education Instructional Program, reach out to their support team via phone, email, or [Facebook chat](#) and ask for another review. *You should not need to submit any other information about The Regent Academy, beyond the information listed here, to receive reimbursement.*
- **Talk with other parents.** The Facebook group [PEP Scholarship Parent Support Group by JoAn Stead](#) is a helpful resource for education and trouble-shooting about PEP.

Happy submitting!