



FREE SCHOLARSHIP ORGANIZATION TOOL

Florida PEP Purchase & Documentation Tracker

A practical, purchase-by-purchase system for checking current rules, saving records, and following reimbursement or direct-purchase activity.

Inside this resource

- ☐ Pre-purchase verification worksheet
- ☐ Annual and category budget plan
- ☐ Purchase and reimbursement log
- ☐ Invoice and supporting-document checklist
- ☐ Educational-purpose notes
- ☐ Issue and follow-up tracker

Created by a homeschool parent. Built for Florida families.

Updated October 2026



USE THE CURRENT RULE

Check first, purchase second

PEP rules, purchasing categories, documentation, deadlines, and account workflows can change. A prior reimbursement or a seller's claim does not prove that a new purchase is eligible.

Not an eligibility guarantee

This tracker helps organize verification and records. Step Up For Students and the current official handbook, purchasing guide, account notices, and approval workflow control eligibility.

Student

Scholarship year

Account/EMA identifier

Quarter or funding period

Current handbook reviewed

Current purchasing guide reviewed

Last account check

Before spending

- ☐ Confirm the student's current PEP status and available funds.
- ☐ Find the item or service in the current purchasing guide.
- ☐ Check category limits, provider requirements, and required documentation.
- ☐ Confirm whether preauthorization, direct purchase, or reimbursement applies.
- ☐ Check the submission deadline and account workflow.
- ☐ Save a dated screenshot or PDF of the controlling guidance when appropriate.



Pre-purchase decision sheet

Item/service

Vendor/provider

Educational purpose

Purchasing-guide category

Rule or page checked

Price, tax, and shipping

Provider qualification checked

Preauthorization required?

Direct purchase or
reimbursement?

Documents required

Decision and date



BUDGET

Plan funds before requests stack up

Category	Planned	Committed	Submitted	Approved	Remaining
Curriculum					
Books/materials					
Technology					
Tutoring/classes					
Testing/evaluation					
Therapy/services					
Field trips					
Other					

Total available

Total planned

Total submitted

Total approved

Expected balance



TRACK

Purchases, direct orders, and reimbursements

Date	Item/service	Vendor	Category	Amount	Method	Status



DOCUMENT

Build a complete support packet

Purchase	Detailed invoice	Proof paid	Guide/category	Extra support	Stored where

Packet quality check

- ☐ Invoice identifies the vendor, date, item/service, quantity, and amount.
- ☐ Proof of payment matches the invoice.
- ☐ Student and scholarship year are clear where required.
- ☐ Educational purpose or curriculum connection is documented when required.
- ☐ Provider credentials or service records are included when required.
- ☐ Every file is legible and named consistently.



EXPLAIN

Educational-purpose and learning-plan notes

Student goal or need

Item/service requested

How it supports learning

Frequency or planned use

Subject/skill area

Expected outcome

Evidence to retain

**Write facts, not
sales copy**

Describe how the student will use the resource and which learning need it supports.
Do not claim approval or reimbursement before it is confirmed in the official system.



FOLLOW THROUGH

Submission and issue tracker

Request/item	Submitted	Reference	Status	Follow-up date	Resolution

Questions or messages to save



VERIFY

Official PEP resources

[Step Up For Students - PEP Resources](#)

[Step Up For Students - Current Purchasing Guides](#)

[Step Up For Students - Scholarship Account Login](#)

Reviewed
October 2, 2026

Open the current handbook and purchasing guide each time rules, categories, provider status, or deadlines could affect a purchase.