

Hope Scholarship Program

Provider Portal Guide

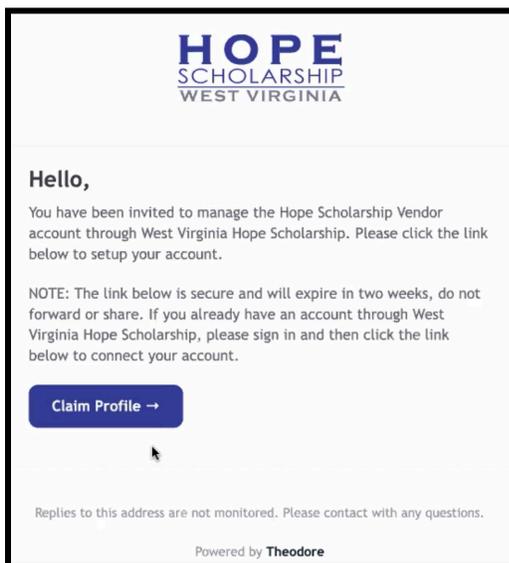
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1. Introduction

Welcome to the Hope Scholarship Program Provider Portal Guide. This comprehensive guide will walk you through the essential steps to set up and manage your account, ensuring a smooth experience for both you and the families you serve.

2. Account Sign Up

- Check your email for an invitation from the Hope Scholarship Program (sent within 48 business hours after the onboarding webinar).
- Click the unique link provided in the email.
- **Please DO NOT share or forward this link. It is assigned to claim your account.**



- On the account creation page:
 - Enter your full name
 - Confirm your email address
 - Create a strong password
 - Click the "Sign Up" button

Hope Scholarship Vendor Sign Up

This area is for administrators only. Only those authorized to manage information on behalf of Hope Scholarship Vendor should proceed.

First Name

Last Name

Email

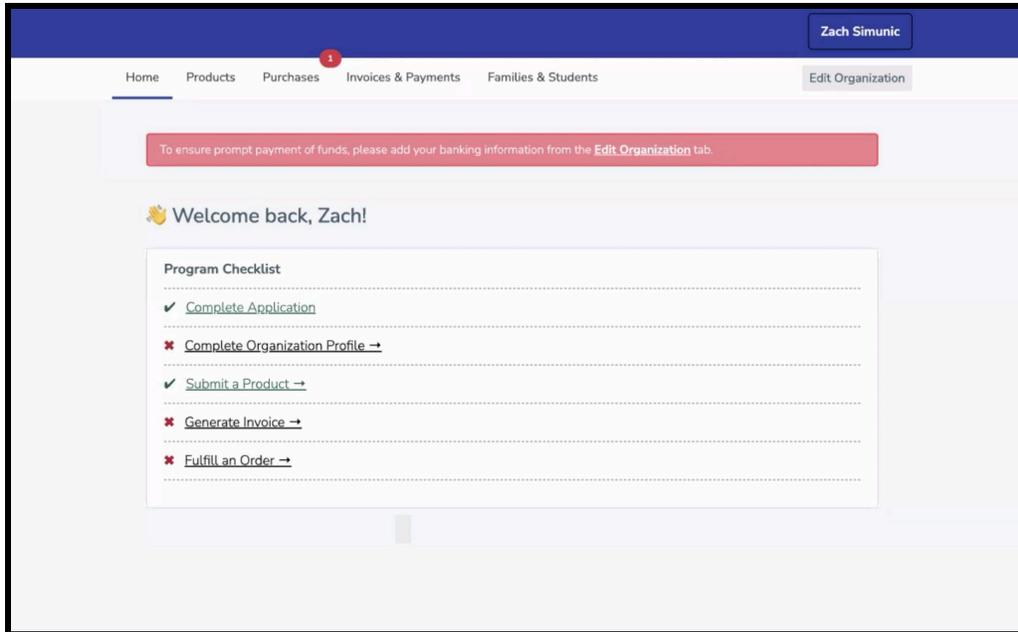
Password

Confirm Password

3. Navigating the Dashboard

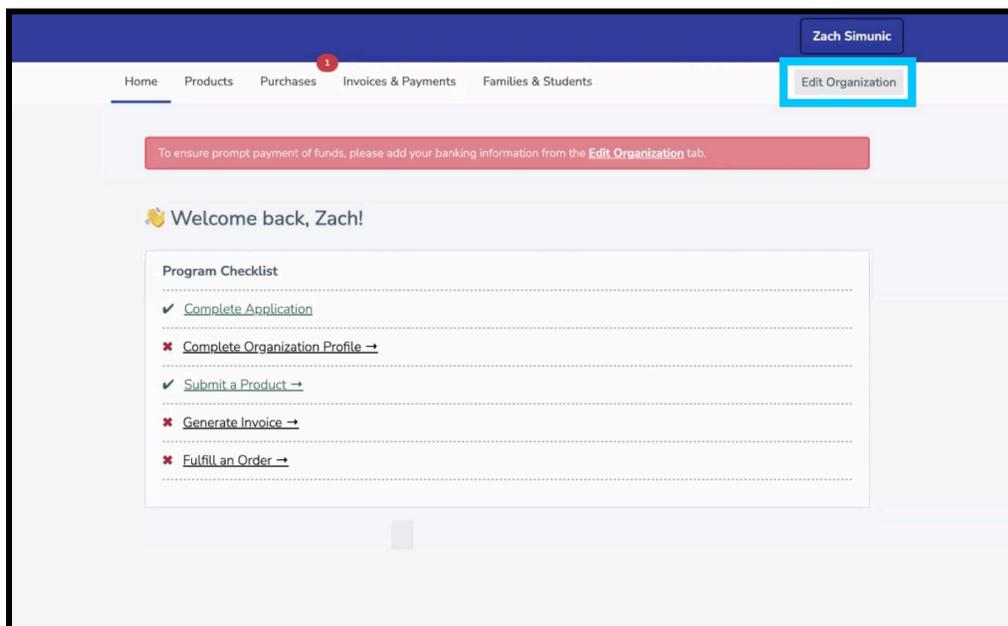
After logging in, you'll see your Provider Dashboard. This is your central hub for managing Hope Scholarship information for your organization. Key areas include:

- Dashboard Locations:
 - Editing Organization Information
 - Connecting Your Bank Account
 - Adding Products to the Closed Marketplace
 - Managing Orders and Invoices
 - Accessing the TheoPay Module (if applicable)
- We'll guide you through each section for a seamless experience.



4. Editing Organization Information

- Click on "Edit Organization" in the top right corner of your dashboard.



- Update or confirm the following information:
 - Organization name
 - Physical address

- Website (if applicable)
- Logo (highly recommended for easier identification by families)
- Ensure your city is correctly listed, as this helps families distinguish between providers with similar names.
- Click "Save" to update your information.

Organization Profile Last updated 07/15/24

Organization or Business Name

Physical Address

City State Zip

Website

Logo
 No file chosen

[View Marketplace Listing](#) →

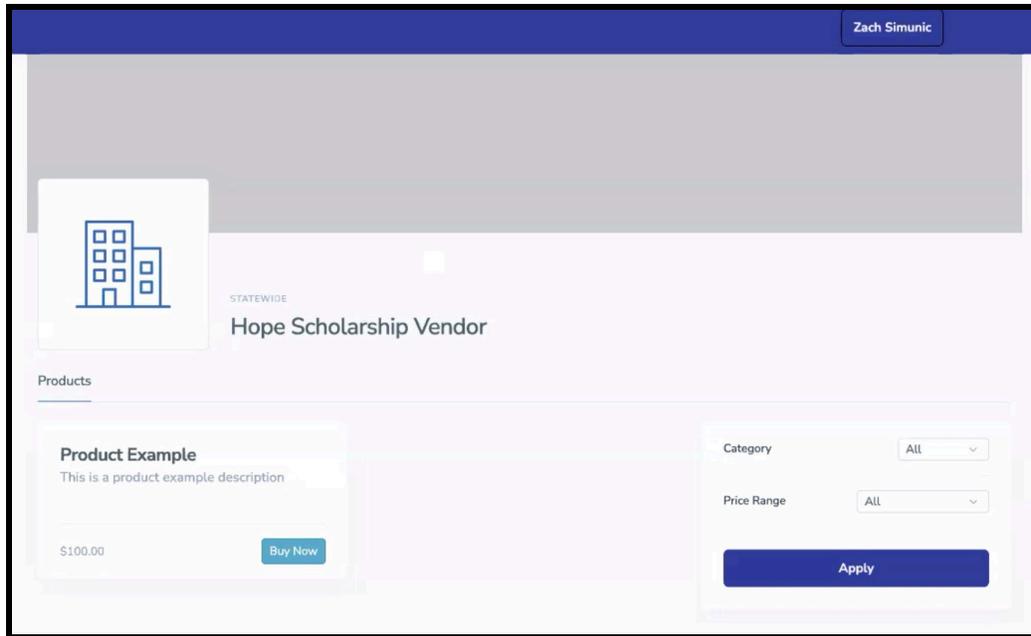
Banking Information

We use [Plaid](#) to keep your bank details secure. Click [Connect Bank Account](#) to securely connect your bank account.

Entity Contact

First Name Last Name

- To view your Marketplace listing, click on the “View Marketplace Listing” button. Note that as you submit products for pre-approval, Hope families will find your approved products here.
- When complete, return to your Account Dashboard.



5. Connecting Your Bank Account

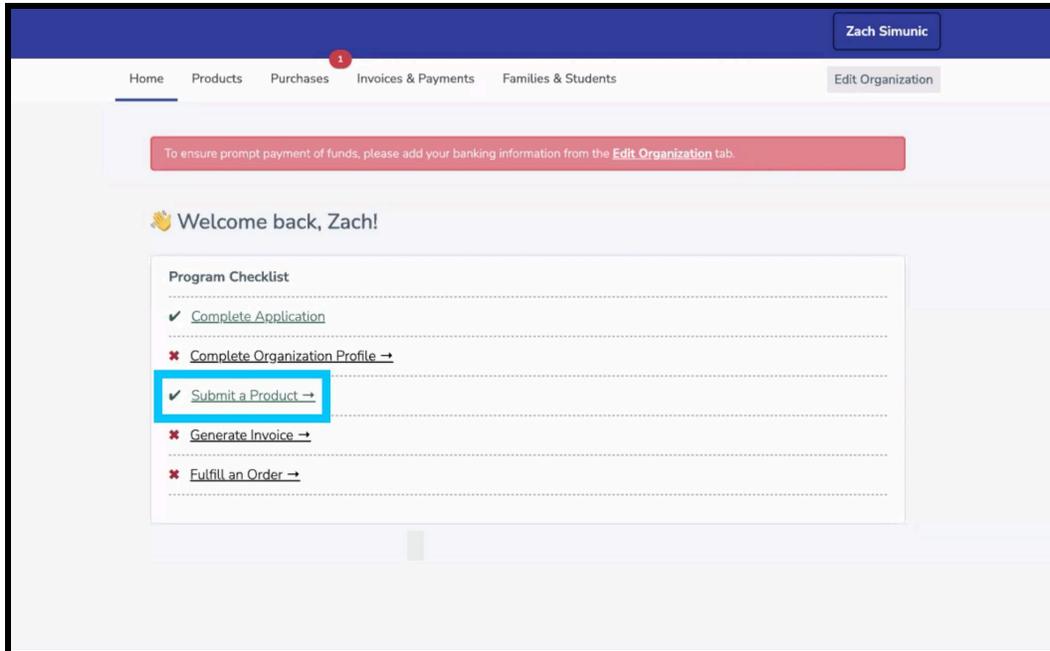
- While in the "Edit Organization" section, scroll down to find the "Connect Bank Account" button.
- To complete the process of connecting your Bank Account in the Hope Platform, please reference this Support Article: [Hope Scholarship Program | Connecting Your Bank Account](#)
- **Note:** This step is crucial for receiving payments and must be completed before you can submit invoices.

6. Closed Marketplace Module

The Closed Marketplace is designed for providers offering services and specific products that require pre-approval. This module instructs you how to list your offerings, manage orders, and generate invoices within the Hope Scholarship platform.

Adding Products and Services

- Navigate to your Provider Checklist. Once there, click on the "Submit a Product" button to submit a new product pre-approval.



Zach Simunic

Home Products Purchases ¹ Invoices & Payments Families & Students Edit Organization

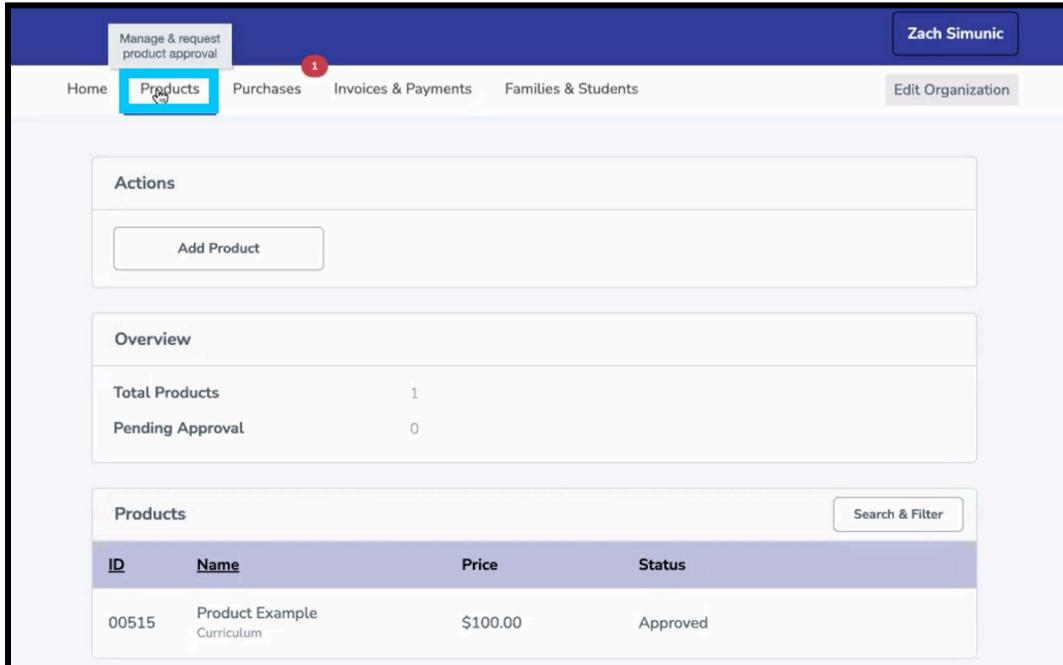
To ensure prompt payment of funds, please add your banking information from the [Edit Organization](#) tab.

Welcome back, Zach!

Program Checklist

- ✓ [Complete Application](#)
- ✗ [Complete Organization Profile →](#)
- ✓ [Submit a Product →](#)
- ✗ [Generate Invoice →](#)
- ✗ [Fulfill an Order →](#)

- Alternately, you may click on the “Products” tab, which navigates to your Products overview page.



Manage & request product approval Zach Simunic

Home **Products** Purchases ¹ Invoices & Payments Families & Students Edit Organization

Actions

[Add Product](#)

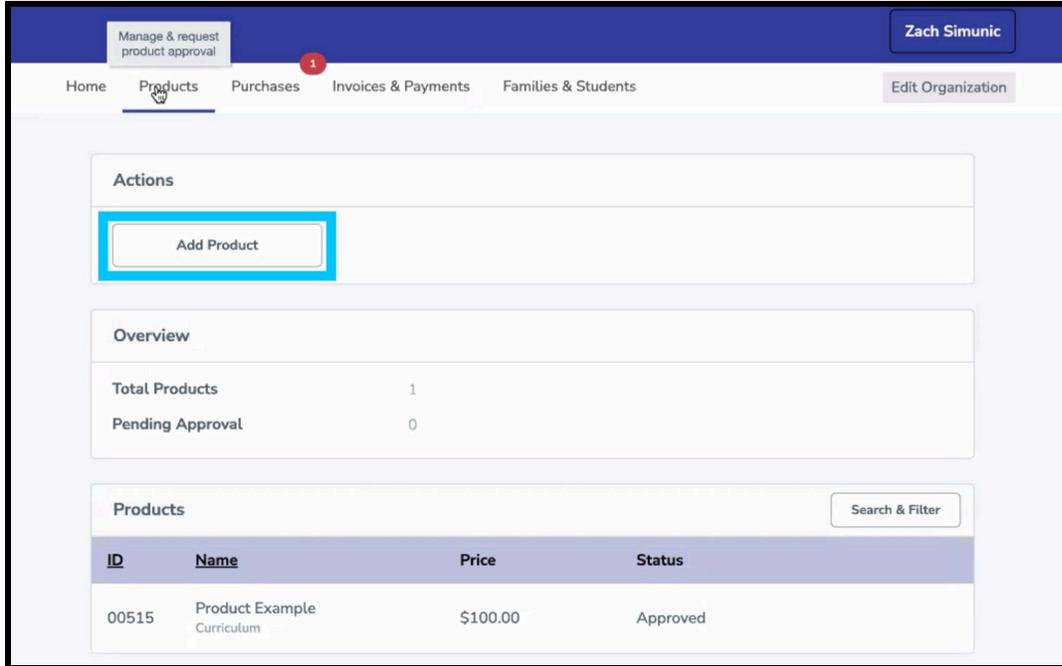
Overview

Total Products	1
Pending Approval	0

Products [Search & Filter](#)

ID	Name	Price	Status
00515	Product Example Curriculum	\$100.00	Approved

- Click the "Add Product" button.



Manage & request product approval

Zach Simunic

Home Products Purchases Invoices & Payments Families & Students Edit Organization

Actions

Add Product

Overview

Total Products 1

Pending Approval 0

Products Search & Filter

ID	Name	Price	Status
00515	Product Example Curriculum	\$100.00	Approved

- In the “Add Product” page, fill in the following information:
 - Product/Service Name
 - Category (select from the dropdown)
 - Unit Price
 - Description (be thorough, as this is used for approval and shown to families)
 - Upload a photo (if applicable)
- Click "Submit" to send your product/service for approval.

Name

Category

Please select the category this product most closely matches

Unit Price

Product Image No file chosen

Description

File Edit View Insert Format

↶ ↷ Paragraph **B** *I* U [Link](#)

You can put links to external resources here

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Managing Orders

- Go to the "Purchases" tab on your dashboard.
- Here you'll see a list of orders placed by families for your products or services.

Zach Simunic

Home Products **Purchases** Invoices & Payments Families & Students Edit Organization

Actions

Overview

Pending Purchases	1
Shipped Purchases	0

Purchases

Request Date	Ship To:	Details	Subtotal	Status
07/15/24	Theodore Simunic zach+vv- parent@studentfirsttech.com 304 West Kirkwood, Maintown, WV, 00000	Product Example Curriculum	\$100.00 (1 x \$100.00)	Requested

- Review new orders regularly to ensure timely processing.
- You can search and filter orders based on status, category, or price.

Search & Filter

Name

Category

Status

Amount

Generating Invoices

- In the Purchases tab, click "Generate Report".

Zach Simunic

Home Products **Purchases** Invoices & Payments Families & Students
Edit Organization

Actions

Generate Report

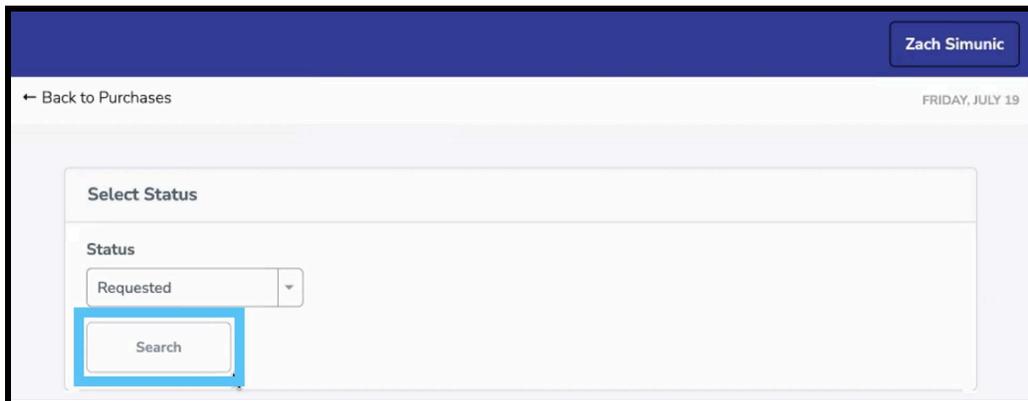
Overview

Pending Purchases	1
Shipped Purchases	0

Purchases

Request Date	Ship To:	Details	Subtotal	Status
07/15/24	Theodore Simunic zach+wv-parent@studentfirsttech.com 304 West Kirkwood, Maintown, WV, 00000	Product Example Curriculum	\$100.00 (1 x \$100.00)	Requested

- Select the orders you wish to invoice (you can use "Requested" to identify purchase requests made by Families). Once selected, click on the "Search" button.



← Back to Purchases FRIDAY, JULY 19

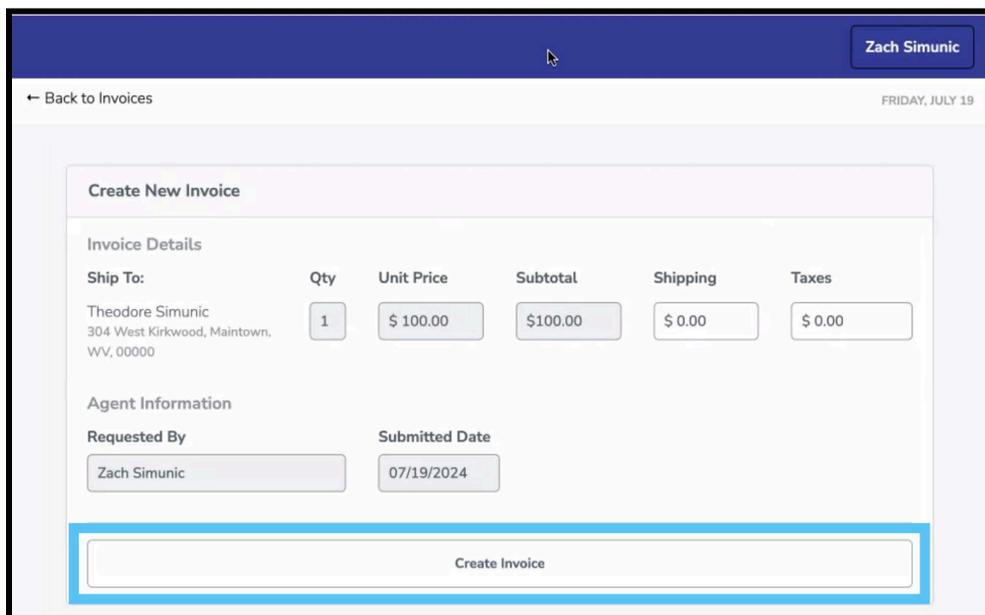
Select Status

Status

Requested

Search

- Review the invoice details, including student information and order specifics.
- You can add notes or annotations about order fulfillment if needed.
- Click "Submit Invoice" when ready.



← Back to Invoices FRIDAY, JULY 19

Create New Invoice

Invoice Details

Ship To:	Qty	Unit Price	Subtotal	Shipping	Taxes
Theodore Simunic 304 West Kirkwood, Maintown, WV, 00000	1	\$ 100.00	\$100.00	\$ 0.00	\$ 0.00

Agent Information

Requested By: Zach Simunic

Submitted Date: 07/19/2024

Create Invoice

Note: Invoices will be reviewed within 7 days, and payment will be processed within 24 hours of approval.

7. TheoPay Module

TheoPay is an innovative technology that allows providers with online stores to participate in the Hope Scholarship Program without directly integrating into the Theodore platform. Here's what you need to know:

Eligibility

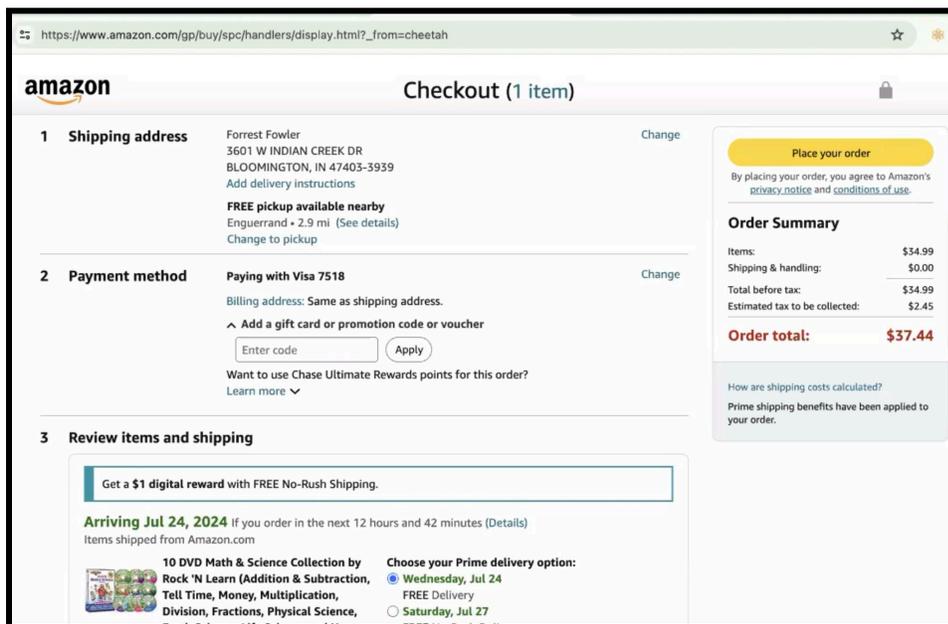
- TheoPay is generally used for goods and commodities.
- If you have an online store with a checkout cart, you may be eligible for TheoPay.

Setup

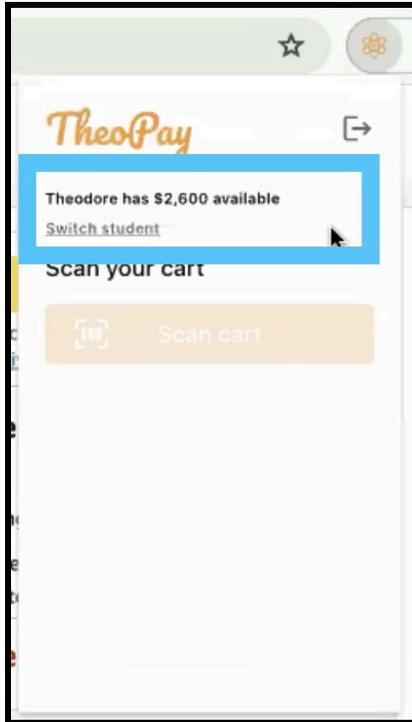
- Ensure your website is correctly listed in your organization profile.
- No additional setup is required on your end for TheoPay functionality.

How it works

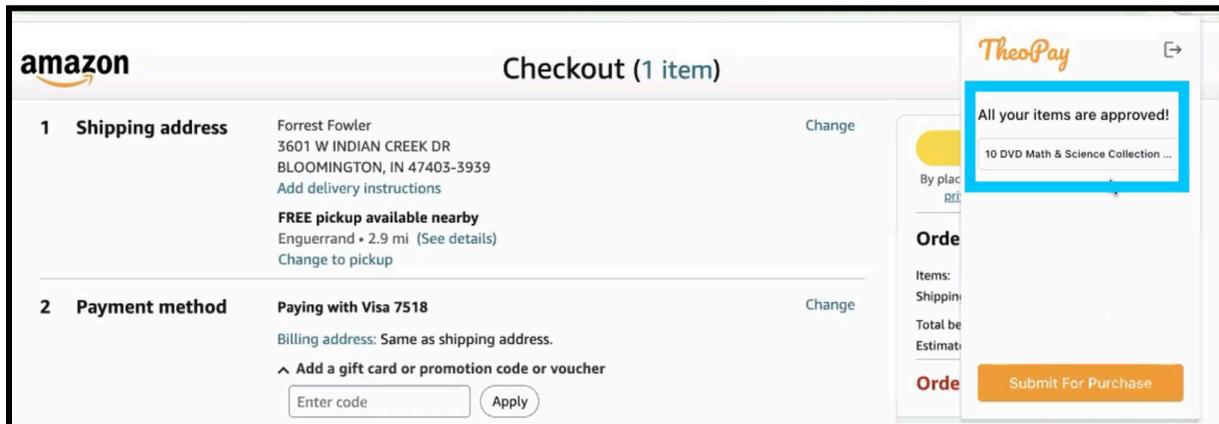
- Families shop on your website as normal, adding items to their cart.



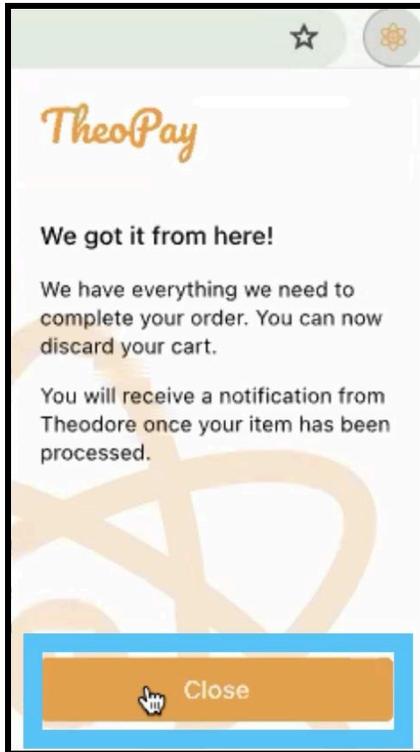
- At checkout, they use the TheoPay app to submit their cart for purchase with Hope Scholarship funds. Note that the family can view their Hope Scholarship award amount within the TheoPay app.



- TheoPay assesses the items in real-time against program requirements.



- If approved, the Hope Scholarship fulfillment team places the order on your website.



Payment

- Payments settle through your normal online payment processor.
- You'll receive funds in near real-time, just like with non-Hope Scholarship purchases.

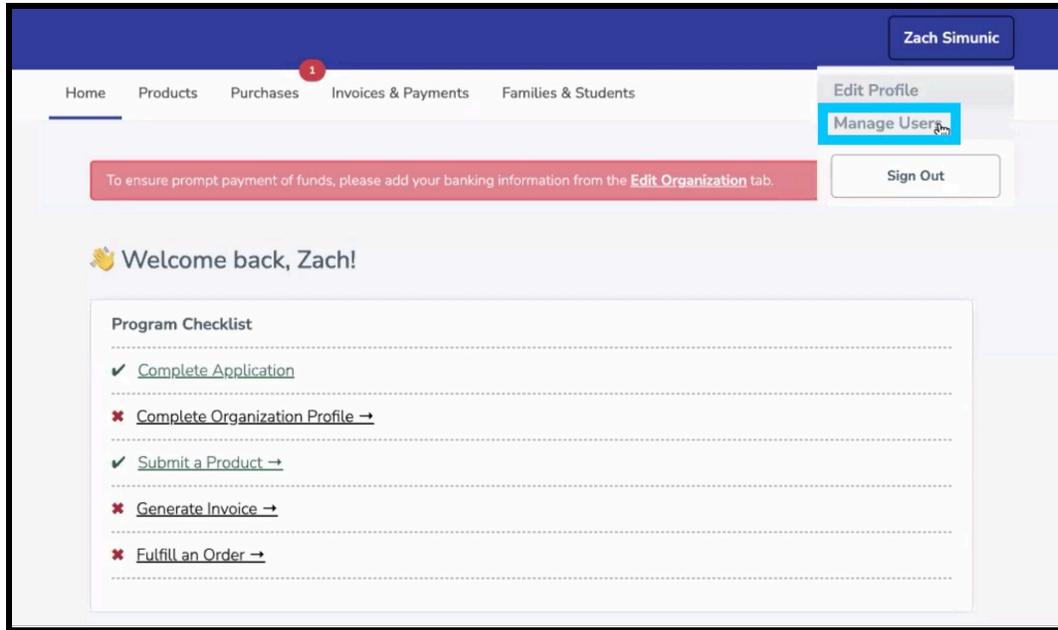
TheoPay Order Fulfillment

- Orders will be processed through your existing fulfillment system.
- Payments will settle through your normal online payment processor.

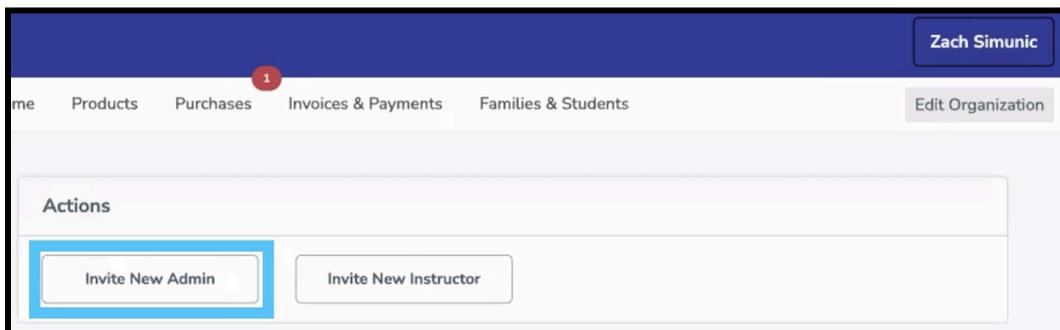
Note: TheoPay is generally used for goods and commodities, while services typically use the Closed Marketplace.

9. Managing Users

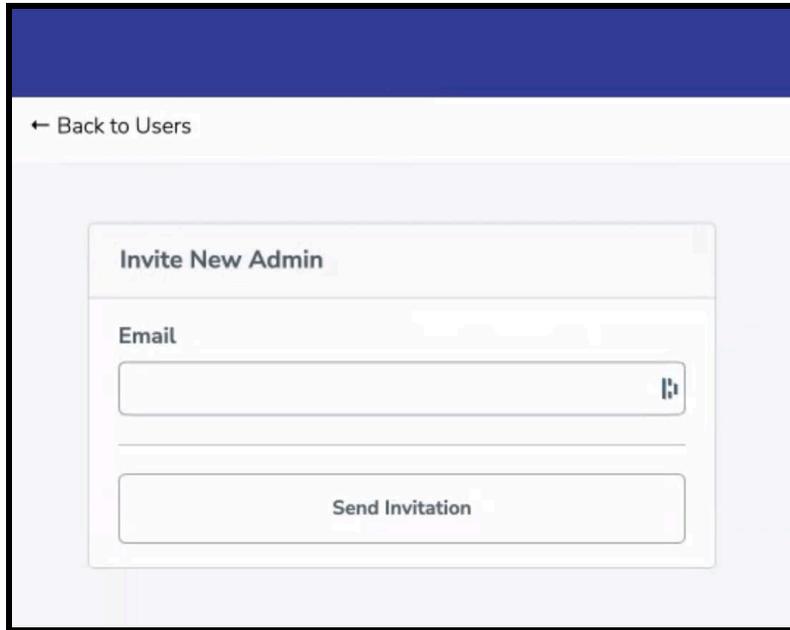
- To access the Manage Users feature::
 - Click on your name in the top right corner of the dashboard.
 - Select "Manage Users" from the dropdown menu.



- To add additional administrators for your organization:
 - On the new page, click "Invite New Admin"



- To add a new administrator:
 - Click "Invite New Admin"
 - Enter the new admin's email address
 - Click "Send Invitation"
- The new Organization admin will receive a personalized invitation to the Hope Platform via email.



← Back to Users

Invite New Admin

Email

Send Invitation

Note: Each administrator should have their own account for security and tracking purposes.

10. Support and Assistance

If you encounter any issues, the Hope Scholarship Program team is available to assist you. You can reach them by email at help@hopescholarshipwv.com You can also reach the Hope Scholarship Engagement Center by phone at (681)-999-HOPE (4673).

For technical issues or questions about TheoPay, contact: vendors@studentfirsttech.com

Thank you for your participation in the Hope Scholarship Program. We're excited to work with you to provide educational opportunities for West Virginia students.