

Hope Scholarship Program

Provider Portal Guide

1. Introduction	2
2. Account Sign Up	2
3. Navigating the Dashboard	3
4. Editing Organization Information	4
5. Connecting Your Bank Account	6
6. Closed Marketplace Module	6
7. TheoPay Module	11
9. Managing Users	14
10. Support and Assistance	16



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.

HOPE SCHOLARSHIP WEST VIRGINIA
Hello,
You have been invited to manage the Hope Scholarship Vendor account through West Virginia Hope Scholarship. Please click the link below to setup your account.
NOTE: The link below is secure and will expire in two weeks, do not forward or share. If you already have an account through West Virginia Hope Scholarship, please sign in and then click the link below to connect your account.
Claim Profile →
h
Replies to this address are not monitored. Please contact with any questions.
Powered by Theodore

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



First Nar	ne
Last Nar	ne
Email	
zach+in	vite@studentfirsttech.com
Passwor	d
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.



	Zach Simunic
Home Products Purchases 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	
<u>Complete Application</u>	
<u>Complete Organization Profile →</u>	
✓ Submit a Product →	
<u>Senerate Invoice →</u>	
K <u>Fulfill an Order →</u>	

4. Editing Organization Information

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

	Zach Simunic
Home Products Purchases 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	
<u>Complete Organization Profile →</u>	
✓ <u>Submit a Product →</u>	
Senerate Invoice →	
¥ Fulfill an Order →	

- 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				
Hope Scholarship Vendor				
Physical Address				
		la.		
City	State		Zip	
	(i)	B		l0
Website				
	B	-		
Logo		_		
Choose File No file chosen				
			N N	View Marketplace Listing →
Banking Information				
Connect Bank Account				
We use <u>Plaid</u> to keep your bank details secure. Click C	onnect Bank	Account	to securely (connect your bank account.
Entity Contact				
First Name Last Name				
[b]		l0		

- 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.



			Zach Simunic
Products	GTATEWIDE Hope Scholarship Vendor		
Product Example		Category	All ~
This is a product examp	le description	Price Range	All ~
\$100.00	Buy Now		Apply

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: <u>Hope Scholarship Program | Connecting Your Bank</u> <u>Account</u>
- **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 Simuni	c
Home Products	Purchases	Invoices & Payments	Families & Students	Edit Organizatio	on
To ensure prov	npt payment of fund	ds, please add your bankir	g information from the <u>Edit Organizati</u>	ion tab.	
👋 Welco	ne back, Za	ach!			
Program C	ecklist				
Complet	e Application				
× Complet	e Organization Pr	rofile →			
 Submit : 	Product →				
× <u>Generat</u>	<u>e Invoice →</u>				
× Fulfill ar	Order →				

• Alternately, you may click on the "Products" tab, which navigates to your Products overview page.

	Manage & re product ap	equest proval				Zach Simunic
Home	Produc	ts Purchases	Invoices & Paymen	rts Families 8	& Students	Edit Organization
	Actions					
	A	dd Product				
	Overview					
	Total Proc	lucts	1			
	Pending A	pproval	0			
	Products					Search & Filter
1	ID	Name		Price	Status	
	00515	Product Example Curriculum		\$100.00	Approved	

• Click the "Add Product" button.



	Manage & req product appr	oval				Zach Simunic
Home	Products	s Purchases	Invoices & Payments	Families & St	tudents	Edit Organization
	Actions Ad	d Product				
	Overview					
	Pending Ap	proval	0			
	Products					Search & Filter
1	D	Name	P	rice	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	
lia.	
Product Image	
Choose File No file chosen	
Description	
File Edit View Insert Format	
$\regic relation for the second secon$	
You can put links to external resources here	
P	POWERED BY TINY
Submit	

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.

ne Products	Purchases nvoices & Paym	ents Families & Stud	lents	Edit Organizat
Actions				
Generate	Report			
Overview				
	h			
Pending Purcha	ases 1			
Shipped Purcha	ases 0			
Purchases				
Request Date	Ship To:	Details	Subtotal	Status
07/15/24	Theodore Simunic zach+wv- parent@studentfirsttech.com 304 West Kirkwood, Maintown,	Product Example Curriculum	\$100.00 (1 × \$100.00)	Requested



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

Name	 Category	
Status	 Amount Min	Max

Generating Invoices

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

	1			Lacitonita
ne Products	Purchases Invoices & Payme	ents Families & Stud	lents	Edit Organizat
Actions				
Generati	Benert			
Generate	Report			
Overview				
Pending Purch	ases 1			
Shipped Purch	ases 0			
Purchases				
- urchuses				
Request Date	Ship To:	Details	Subtotal	Status
07/15/24	Theodore Simunic zach+wv- parent@studentfirsttech.com	Product Example	\$100.00	Requested
01110124	304 West Kirkwood, Maintown,	Curriculum	(1 × \$100.00)	nequested

• 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.



	Zach Simunic
← 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.

Create New Invoice		
Invoice Details		
Ship To: Qty Unit Price Subto	otal Shipping Tax	kes
Theodore Simunic 304 West Kirkwood, Maintown, WV, 00000 \$100	0.00 \$ 0.00 \$	0.00
Agent Information		
Requested By Submitted Date		
Zach Simunic 07/19/2024		

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.

º₀ htt	ps://www.amazon.com/gp/b	uy/spc/handlers/display.html?_f	rom=cheetah			*
am	azon		Checkout (1 item)			A
1	Shipping address	Forrest Fowler 3601 W INDIAN CREEK DR BLOOMINGTON, IN 47403-39 Add delivery instructions	939	Change	Place your order By placing your order, you agree privacy notice and condition	to Amazon's Is of use.
		FREE pickup available nearb Enguerrand • 2.9 mi (See det Change to pickup	y ails)		Order Summary	\$34.99
2	Payment method	Paying with Visa 7518 Billing address: Same as shipp	ping address. tion code or voucher	Change	Shipping & handling: Total before tax: Estimated tax to be collected:	\$0.00 \$34.99 \$2.45
		Enter code Want to use Chase Ultimate R Learn more 🗸	Apply Rewards points for this order?		How are shipping costs calculate Prime shipping benefits have been your order.	d?
3	Review items and sh Get a \$1 digital rew Arriving Jul 24, 20 Items shipped from Am 10 DVD Rock 'N Tell Tim	ard with FREE No-Rush Shipping 224 If you order in the next 12 h azon.com Math & Science Collection by Learn (Addition & Subtraction, e, Money, Multiplication,	ours and 42 minutes (Details) Choose your Prime delivery option: © Wednesday, Jul 24 FREE Delivery		your oree.	

• 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.

am	azon	Checkout (1 item)			TheoPay ⊡	
1	Shipping address	Forrest Fowler 3601 W INDIAN CREEK DR BLOOMINGTON, IN 47403-3939 Add delivery instructions	Change	By plac	All your items are approved!	
		FREE pickup available nearby Enguerrand • 2.9 mi (See details) Change to pickup		Orde		
2	Payment method	Paying with Visa 7518 Billing address: Add a gift card or promotion code or voucher Enter code Apply	Change	Shippin Total be Estimati	Submit For Purchase	l.

• 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.



Products Purchases Invoices & Payments Families & Students Edit P Manage To ensure prompt payment of funds, please add your banking information from the Edit Organization tab.	Zach Simunio
To ensure prompt payment of funds, please add your banking information from the <u>Edit Organization</u> tab.	ofile e Users
Welcome back, Zach! Program Checklist ✓ Complete Application ✓ Complete Organization Profile → ✓ Submit a Product → ✓ Generate Invoice →	Sign Out
Program Checklist ✓ Complete Application X Complete Organization Profile → ✓ Submit a Product → X Generate Invoice →	
 ✓ <u>Complete Application</u> ※ <u>Complete Organization Profile</u> → ✓ <u>Submit a Product</u> → ※ <u>Generate Invoice</u> → 	
<u>Complete Organization Profile →</u> <u>Submit a Product →</u> <u>Generate Invoice →</u>	
✓ <u>Submit a Product →</u> Generate Invoice →	
¥ <u>Generate Invoice</u> →	
¥ <u>Fulfill an Order</u> →	

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

					Zach Simunic
me	Products	Purchases	Invoices & Payments	Families & Students	Edit Organization
A	actions				
	Invite Nev	v Admin	Invite New Instruct	tor	

- 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.



← Ba	ck to Users
	Invite New Admin
	Email
	[h
	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 <u>help@hopescholarshipwv.com</u> 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.