# Hope Scholarship Program

## School Administrator Portal Guide

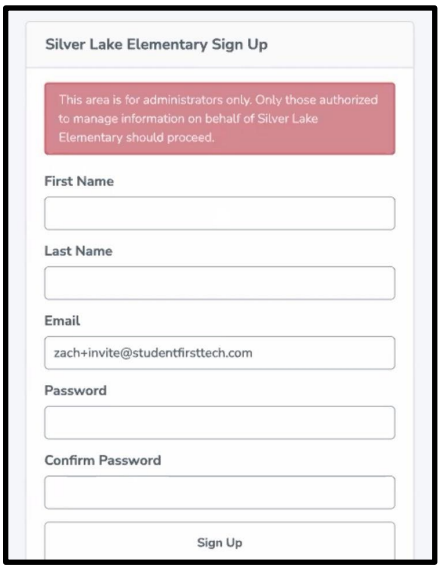

1. Introduction ..... 1
2. Account Sign Up ..... 1
3. Navigating the Dashboard ..... 1
4. Editing Organization Information ..... 2
5. Connecting Your Bank Account ..... 4
6. Managing Tuition and Fees ..... 4
7. Student Enrollment Verification ..... 5
8. Verifying Enrollment & Generating Invoices ..... 7
9. Adjusting Erroneous Invoices ..... 12
10. Hope Student Withdrawal Process ..... 12
11. Closed Marketplace Module for Schools ..... 17
12. Managing Users ..... 23
13. Reports Feature ..... 24
14. Support and Assistance ..... 28

# 1. Introduction

Welcome to the Hope Scholarship Program Portal for school administrators. This 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.
- 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

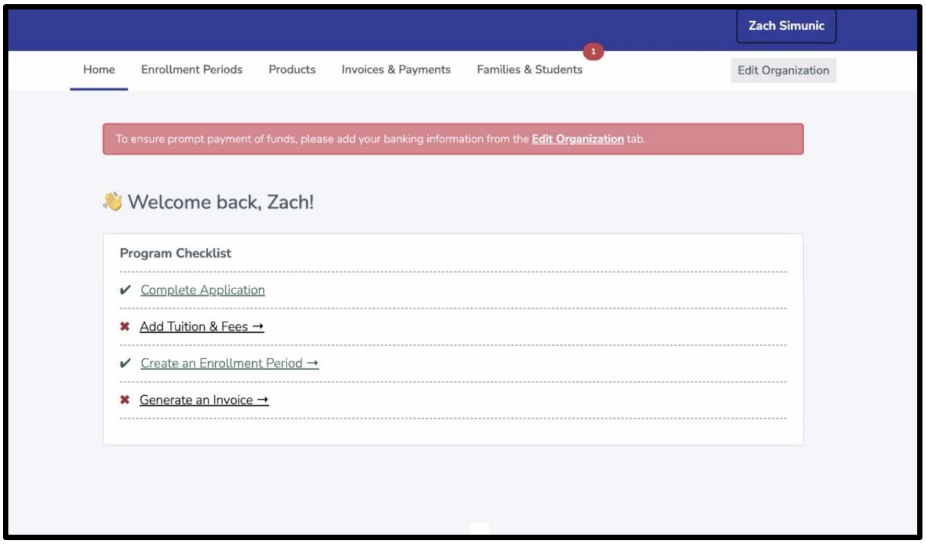



# 3. Navigating the Dashboard

- Welcome to your Admin Dashboard, your central hub for managing Hope Scholarship information for your school.
- Dashboard Locations:

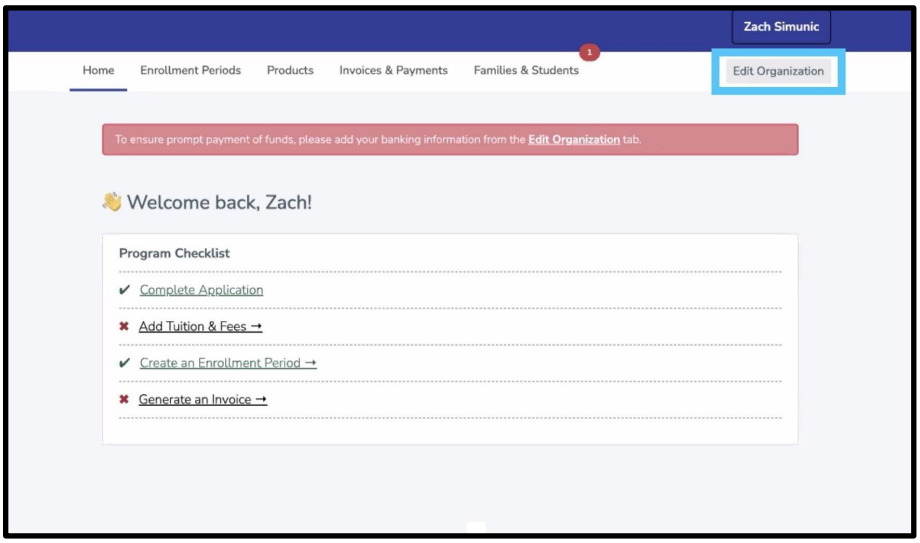
- Editing Organization Information
- Setting Tuition and Fees
- Verifying Enrollment in Families & Students tab
- Generating Invoices
- Managing Products (if applicable)

- We'll guide you through each section for a seamless experience.

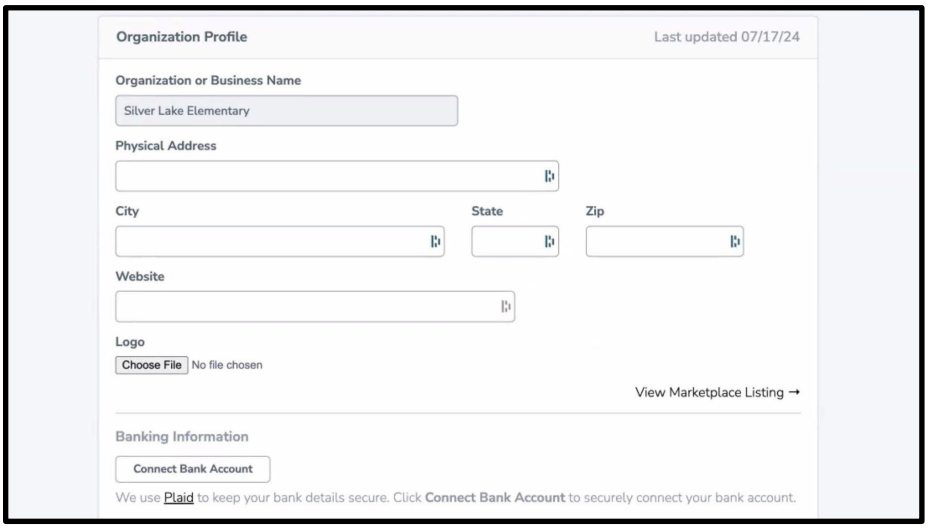



# 4. Editing Organization Information

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



- Update or confirm the following information:
    - School's legal business 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 schools with similar names.**

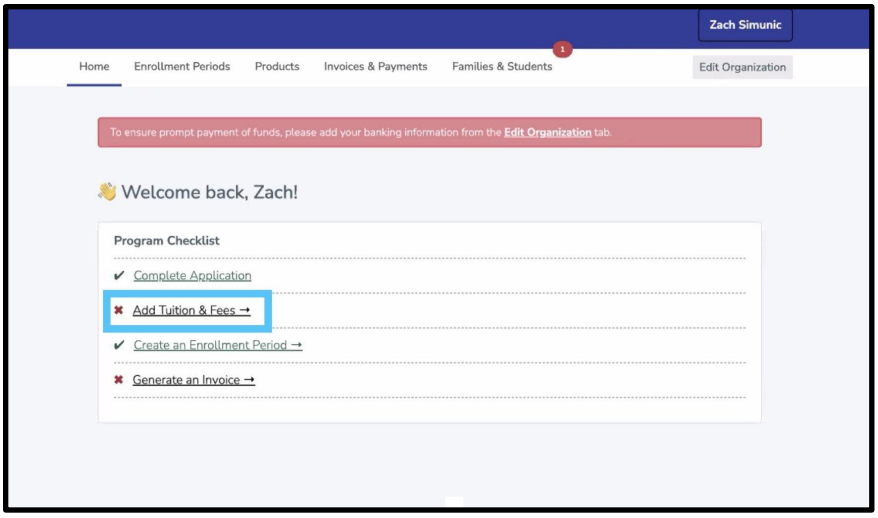



## 5. Connecting Your Bank Account

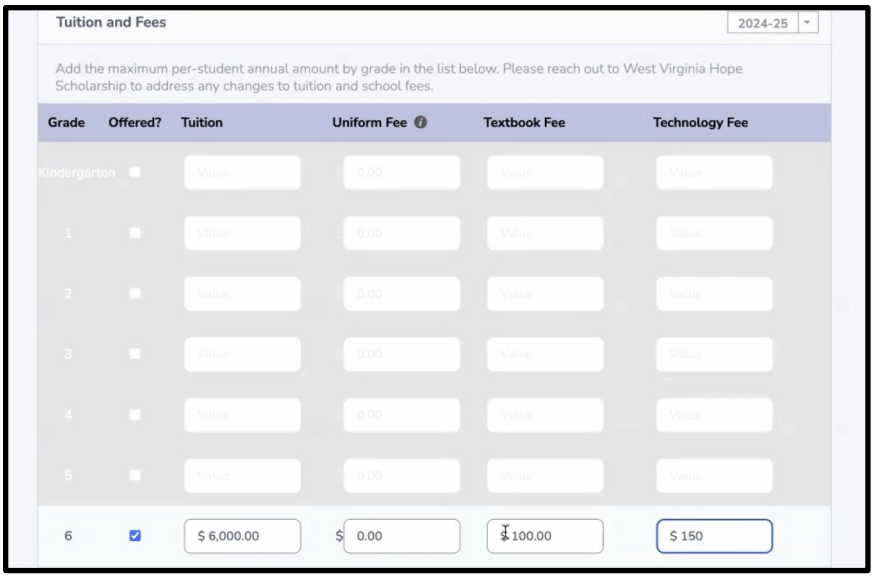
- While in the "Edit Organization" section, scroll down to find the "Connect Bank Account" button.
- To complete the process of connecting your Bank Account in the Hope Platform, please reference this Support Article: Hope Scholarship Program | Connecting Your Bank Account
- Please email help@hopescholarshipwv.com if you are unable to connect your banking institution.
- **Note:** This step is crucial for receiving payments and must be completed before you can submit invoices. If your banking account changes after establishing your Hope account, please notify help@hopescholarshipwv.com for assistance.

## 6. Managing Tuition and Fees

- From your Program Checklist, click on "Add Tuition and Fees".



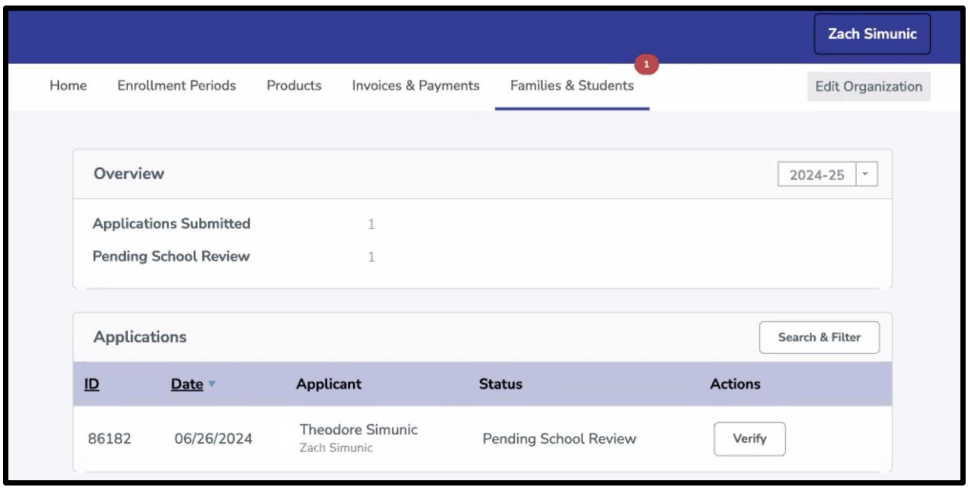

- On the Tuition and Fees page, perform the following user actions:
    - Ensure that the Academic Year is set to the correct school year at the top, right of the screen.
    - Check the boxes next to each grade level your school serves. This indicates which grade levels your school accepts for enrollment.
    - Enter the **maximum tuition amount for the entire school year**, for each grade level. **Do not include any discounts, scholarships, or financial aid at this time.**
    - Fill in the amounts for any additional fees (e.g., textbooks, technology, uniforms) that apply to your school.
    - If a fee doesn't apply, leave it blank or enter zero.



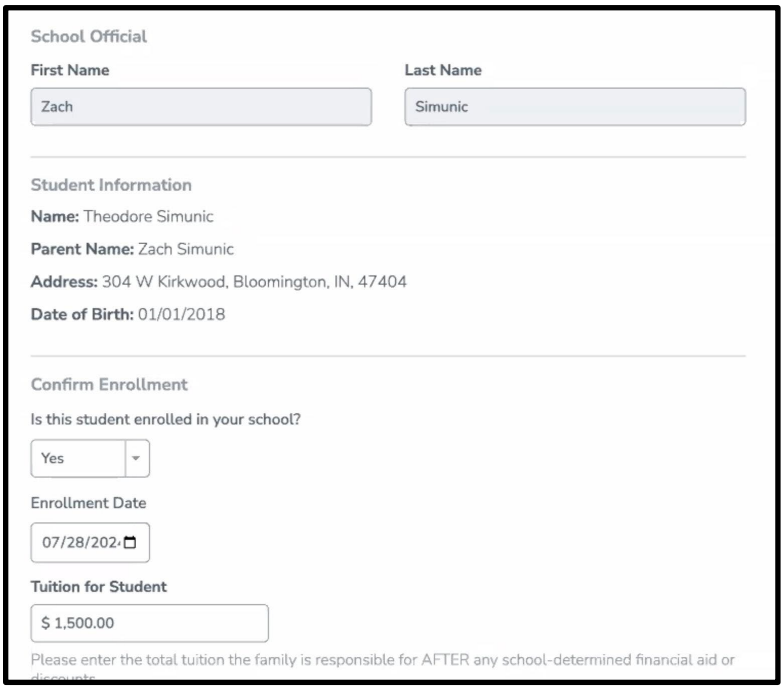

- Carefully review all entered information before submitting, as it can only be edited once per academic year. Click "Save and Continue" when finished. Please do not enter Tuition and Fees for the 2025-26 school year until after July 1, 2025.

## 7. Student Enrollment Verification

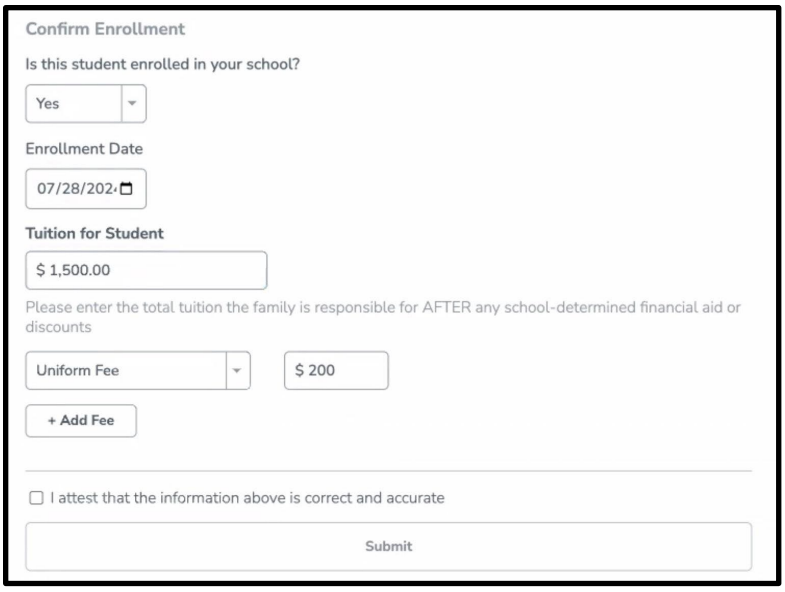
- Students that have an “Approved” status application will be able to select a school. Students in “Conditionally Eligible” or “Eligible” status will not be able to select a school until that status is updated to “Approved.” After families select your school in the platform, you'll see pending enrollments in the "Families and Students" tab.



- Once there, select a student and click "Verify" next to each student's name.
    - Confirm the student's information is correct.
    - Enter the student's start date (typically the first day of school or their start date if enrolling mid-year.



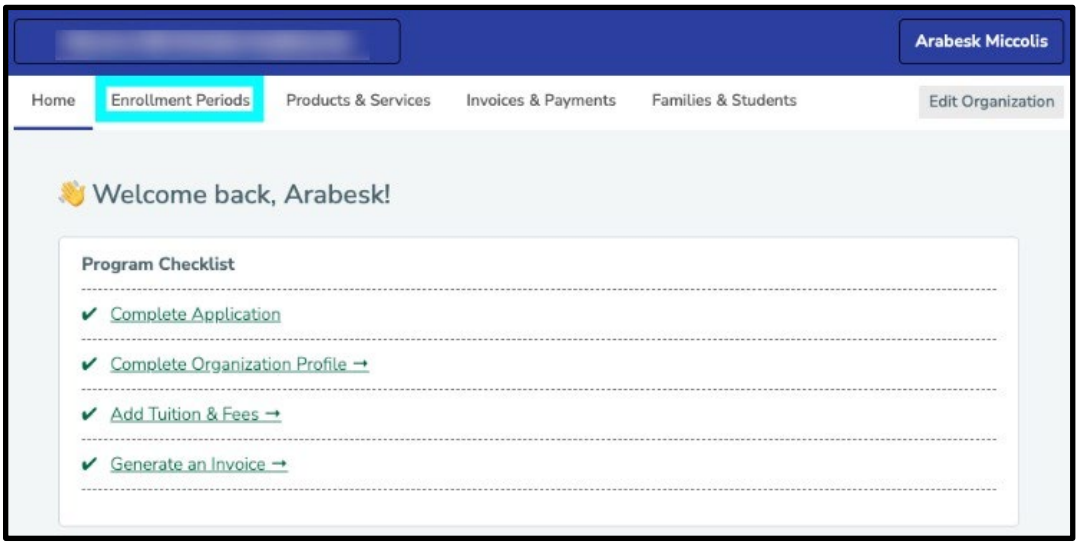

    - **Enter the specific tuition and fee amounts due for the school year for this student, including any applicable discounts. Carefully review all information before submitting.**
    - These amounts cannot exceed the maximums set in your tuition and fee schedule.
    - Click "Submit" to complete the verification process.
- Repeat this process for each requested student enrollment.



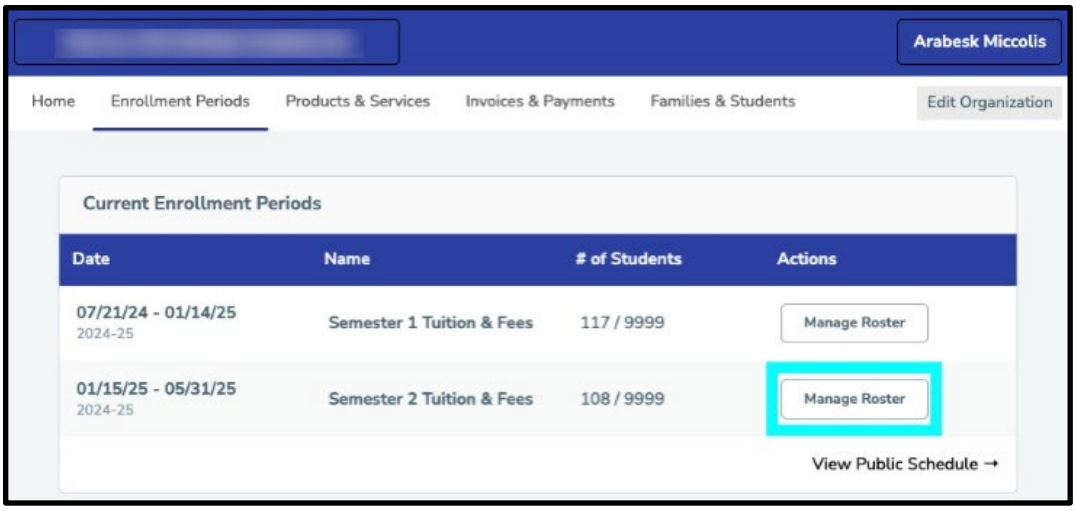

# 8. Verifying Enrollment & Generating Invoices

## Accessing the Enrollment Management Screen

- After guardians have funded their student's Hope account and allocated funds to your school, you will need to verify enrollment before processing payments.
- Navigate to the "Enrollment Periods" tab on your dashboard to begin the verification process.

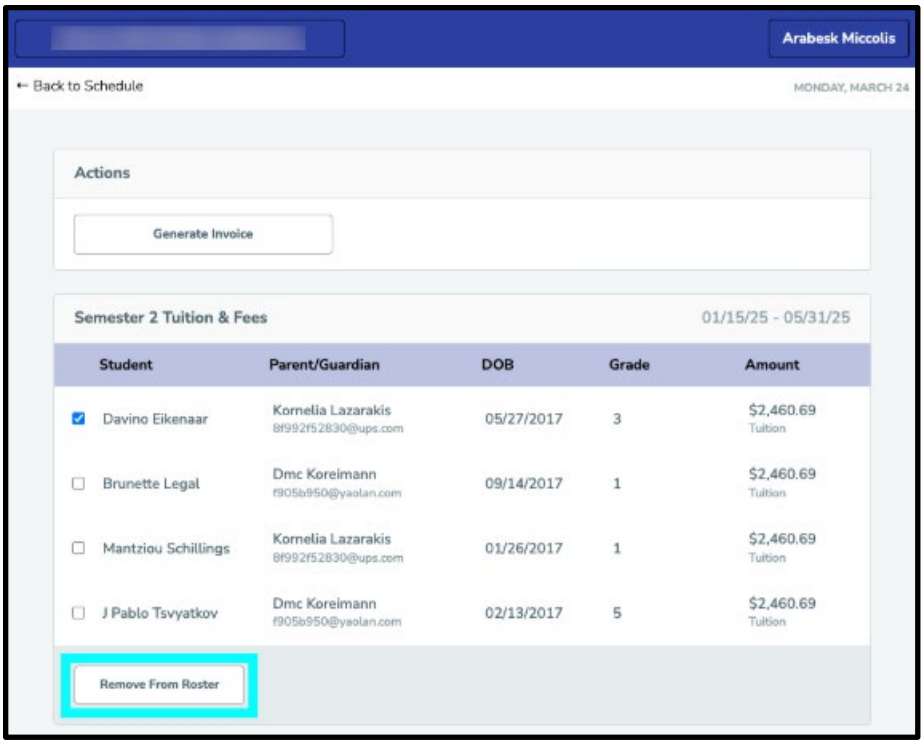


- Click the "Manage Roster" button to access your current student roster for the active enrollment period.




## Verifying Student Enrollment

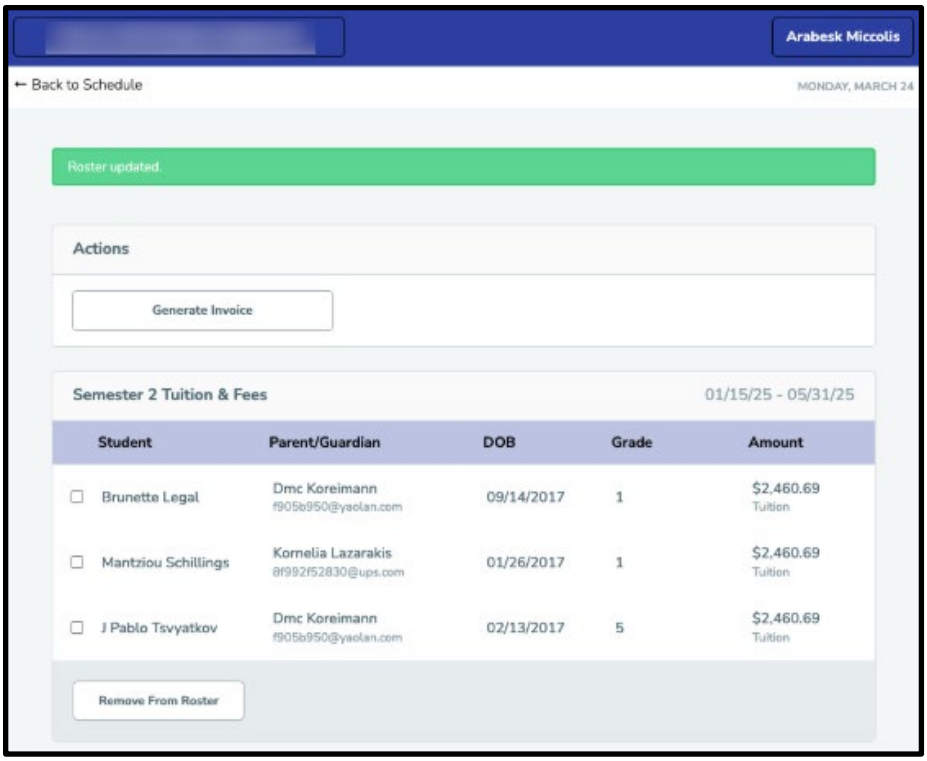
- **Critical Step:** Always verify student enrollment and tuition information before generating invoices. Inaccurate information must be addressed by removing affected students from the roster first.
- **To remove a student with incorrect information:**
    - Select the checkbox next to the student's name.
    - Click the "Remove From Roster" button at the bottom of the page.
    - Look for the green "Roster Updated" confirmation banner at the top of your screen.




## Why Proper Roster Management Matters

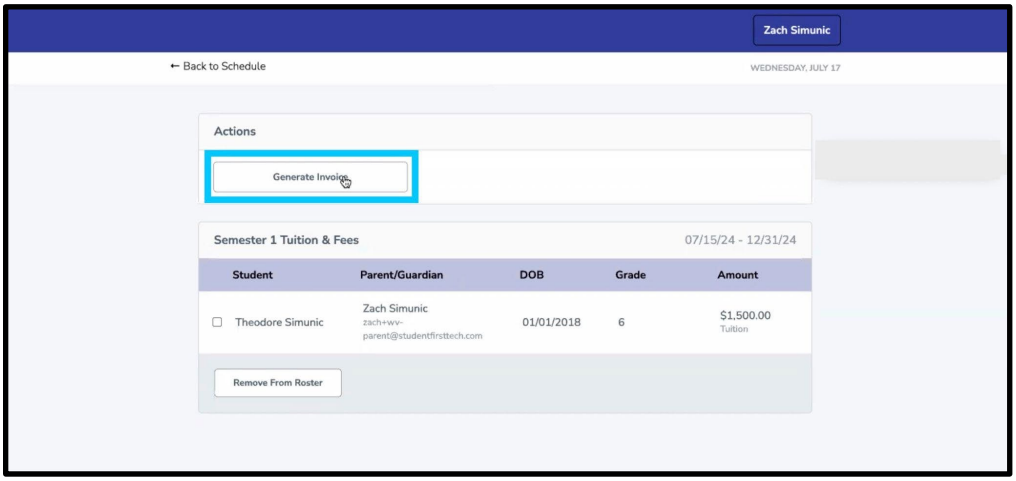
When you remove students with incorrect information from your roster:

- You create an opportunity to work with families and program administrators to correct the information.
- You maintain your ability to process invoices for other students without delays.
- You ensure accurate and timely fund disbursement to your school.



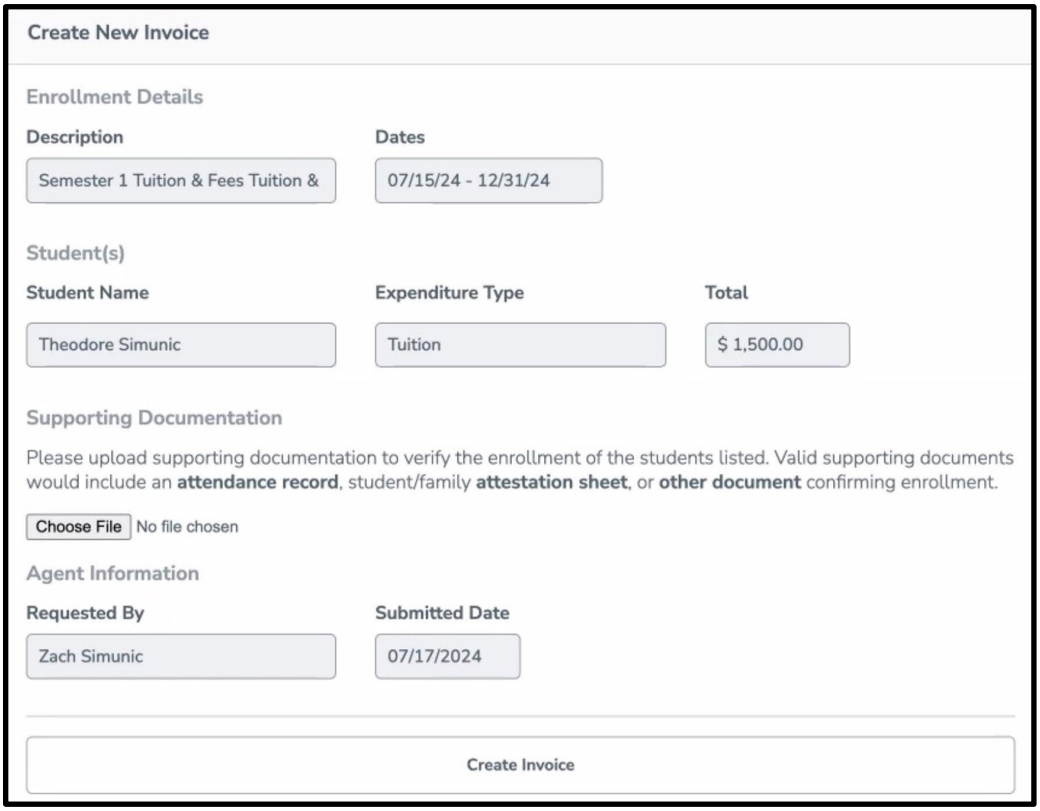

## Generating Invoices

- Once your roster is verified, click the "Generate Invoice" button to create an invoice for all students on your roster.




- Review the generated invoice details for accuracy:
    - Student names and information
    - Tuition and fee amounts

- Total invoice amount
- **Flexibility Note:** You can submit multiple invoices throughout each semester as needed.
- **Documentation Note:** No additional supporting documentation is required for standard invoice submission.




## Payment Processing Timeline

- Submitted invoices follow this processing schedule:
  - Review period: Up to seven (7) days
  - Payment processing: Within one (1) business day after approval

## Pro Tips for Successful Invoice Management

- **Verification First:** Always verify your entire roster before clicking "Generate Invoice"
- **Plan Ahead:** Remember that the approval process takes up to 7 days when planning your school's cash flow
- **Need Corrections?** If you discover errors after submission, refer to Section 9: Adjusting Erroneous Invoices

## 9. Adjusting Erroneous Invoices

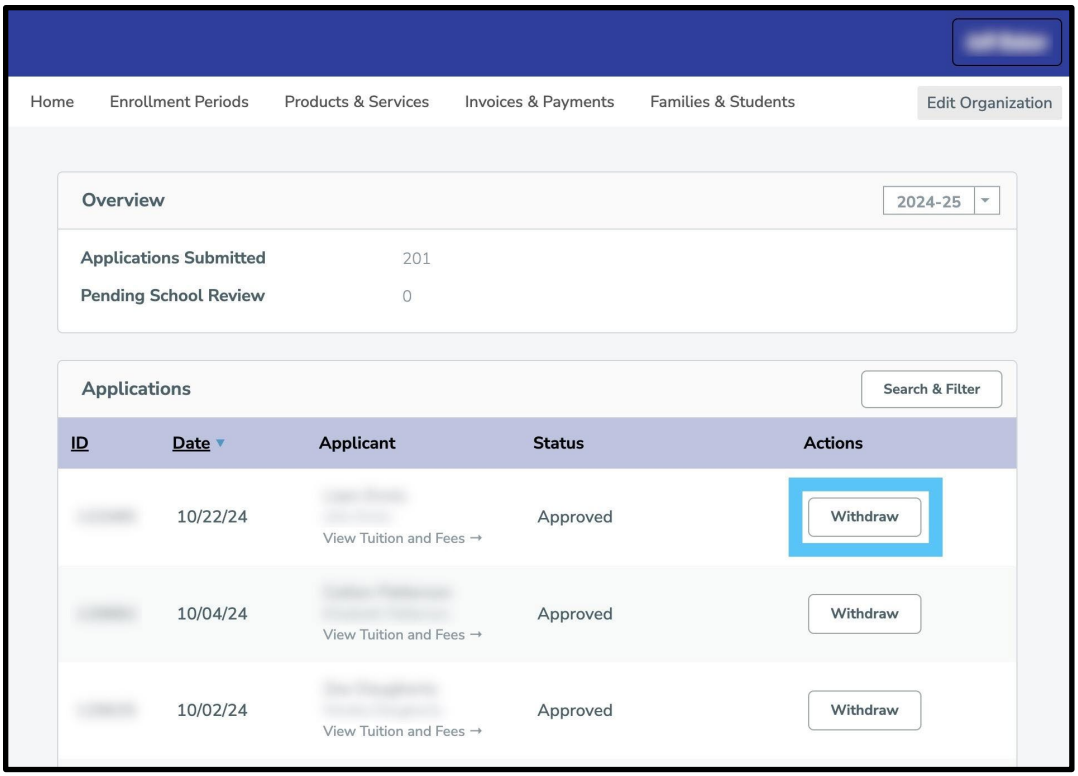
- If you need to correct an invoice that contains errors, locate the invoice in your "Invoices" tab.
    - Find the invoice marked as "Rejected" that shows a "Resubmit" option.




- Click the "Resubmit" button to begin making corrections to the invoice.
- Once in edit mode:
    - Review all line items carefully.
    - Click "Remove" next to any incorrect expenses that need to be deleted.
    - Verify with the student's guardian that funds have been released back to the student's account.
- After removing incorrect items:
    - Please email hopescholarshipwv@wvsto.gov for the Tuition and Fee Correction template. Once the template has been completed, please return the template to the email address above.
    - Hope Scholarship Board staff will work with STO to update the student's enrollment and notify the guardian to resubmit payment for Tuition and Fees.
- **Note: It's important to verify all enrollments before proceeding, as this ensures timely scholarship payments for your school and students.**

## 10. Hope Student Withdrawal Process

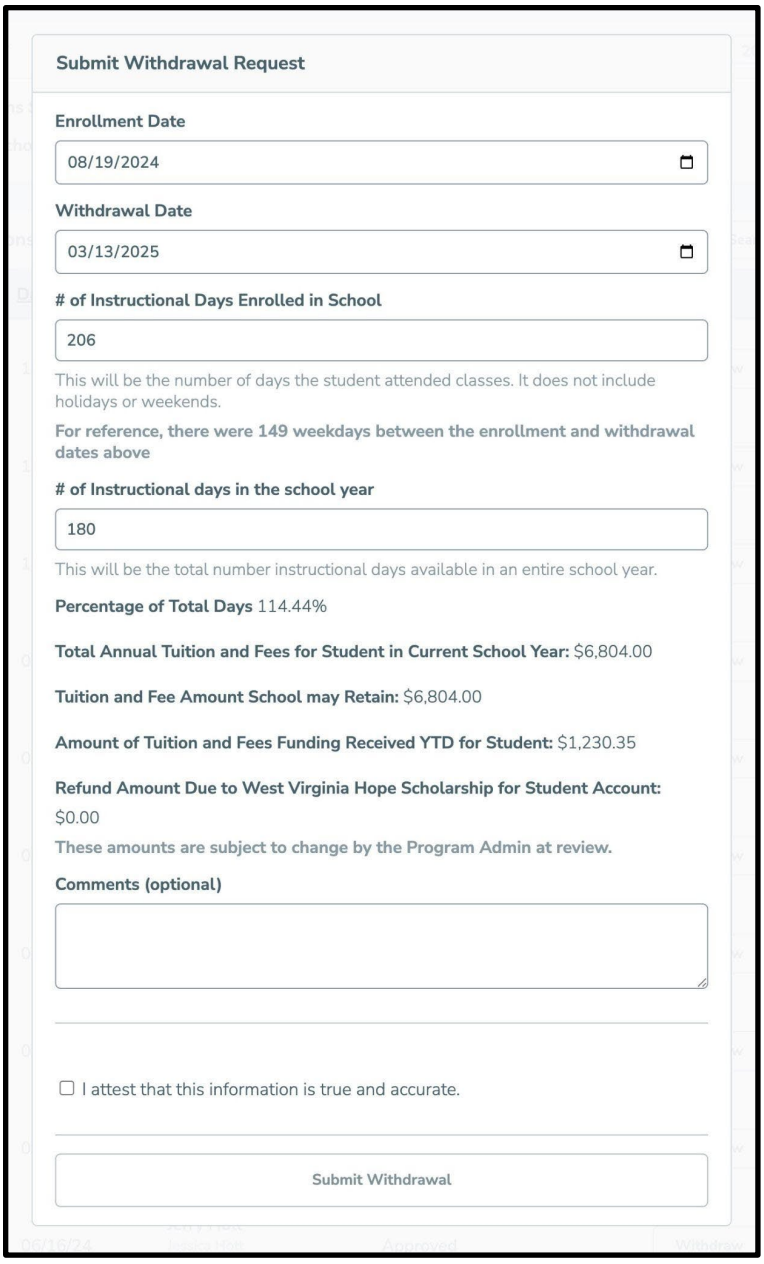
- To begin the withdrawal process for a Hope Scholarship student, navigate to the **"Families & Students" tab**.
- Locate the student who is withdrawing and click the **"Withdraw" button** next to their name.



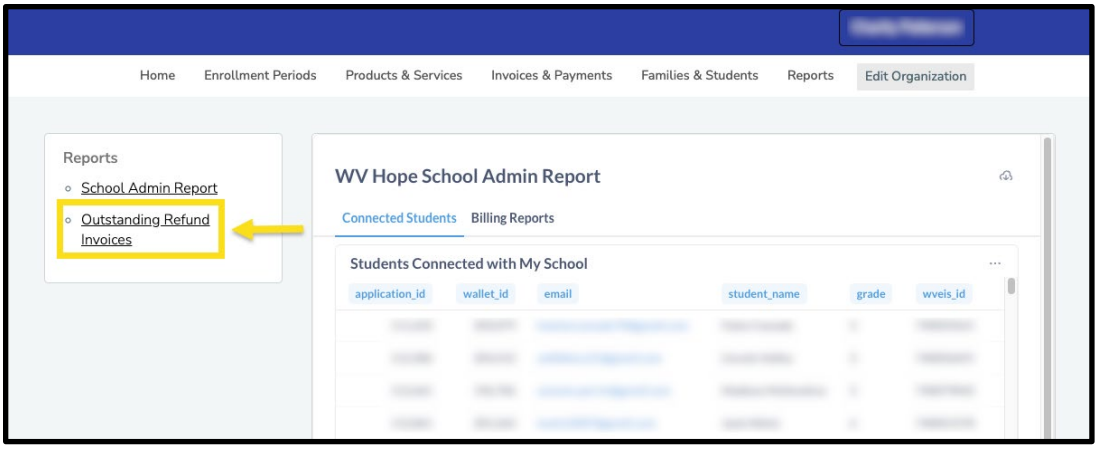

- On the withdrawal form, you will need to complete the following fields:
    - **Enrollment Date**
    - **Withdrawal Date**
    - **Enter the Number # of instructional days the student was enrolled in your. Please do not include weekends, holidays, or any other out of school days.**
- Please review the following pre-populated fields below for accuracy:
    - **Total Annual Tuition and Fees for Student in Current School Year:** This is the sum of all tuition and fees that you previously set for this student.
    - **Tuition and Fee Amount School may Retain:** This amount is calculated by multiplying the total annual tuition and fees for the student by the ratio of number of instructional days enrolled divided by the number of instructional days in the school year.
    - **Amount of Tuition and Fees Funding Received YTD for Student:** This is the amount of Hope Scholarship funds that your school has received for tuition and fees for the current school year. This number should not include any payments for products for items like school lunches, tutoring, after-school care, etc.
    - **Refund Amount Due to WV Hope Scholarship for Student Account:** This is calculated by subtracting the Tuition and Fee Amount School may Retain from

the Amount of Tuition and Fees Funding Received YTD for Student. If this is a positive number, the school will owe a refund of Hope Scholarship funds back to the student's Hope Scholarship account. If this calculation is zero or a negative number, the refund amount due will be listed as zero.

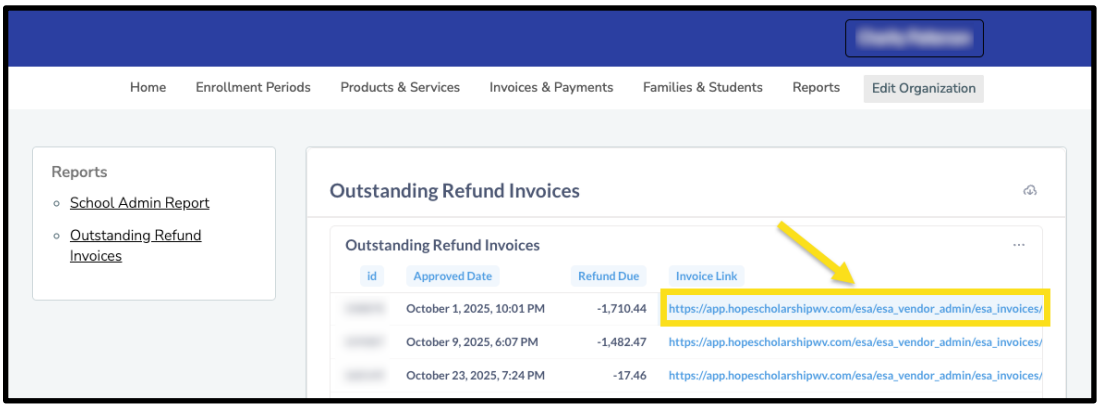
- Please add additional comments. Comments are required and will be available to Hope Scholarship Program administrators as they review the student withdrawal in the online platform.
- **Carefully review all entered information before clicking "Submit."**



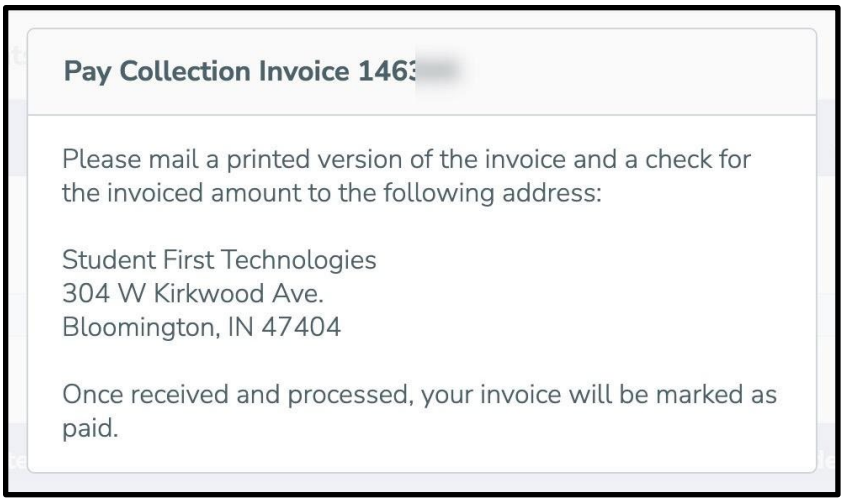

- Hope Scholarship Program administrators will review the information.
- Once the withdrawal is approved by the program administrators, a collection invoice will be automatically generated in your "Reports" tab if you owe a refund to the withdrawing student's Hope account.
- To process the refund payment:
    - Navigate to the **"Reports" tab** in your dashboard.
    - In the **Reports** menu, click on **"Outstanding Refund Invoices"**




- Locate the **negative invoice** for the withdrawn student in the table.
- Click the relevant **Invoice Link** to review details.




- Complete the **refund payment process** shown below.

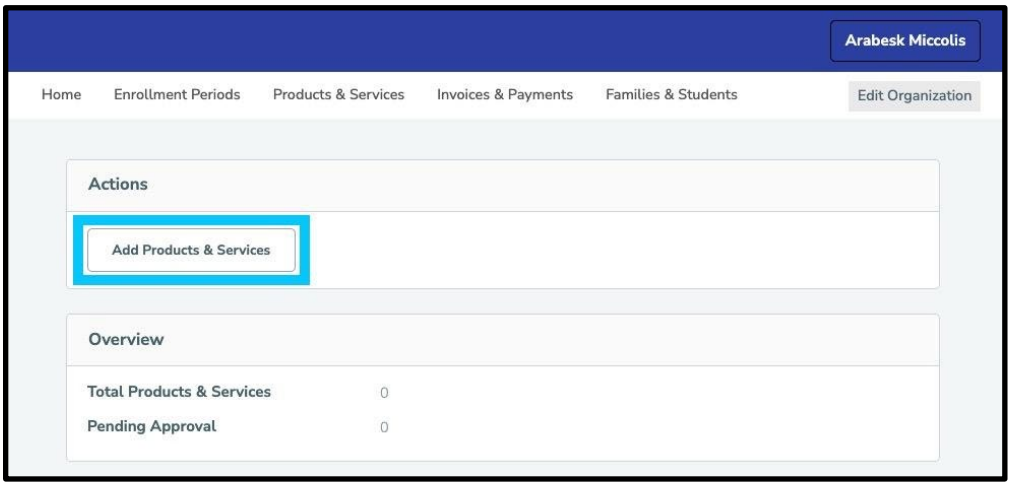



- Ensure that refund payments are processed within 30 days to maintain compliance with program requirements.  All refund checks will be made to Student First Technologies.

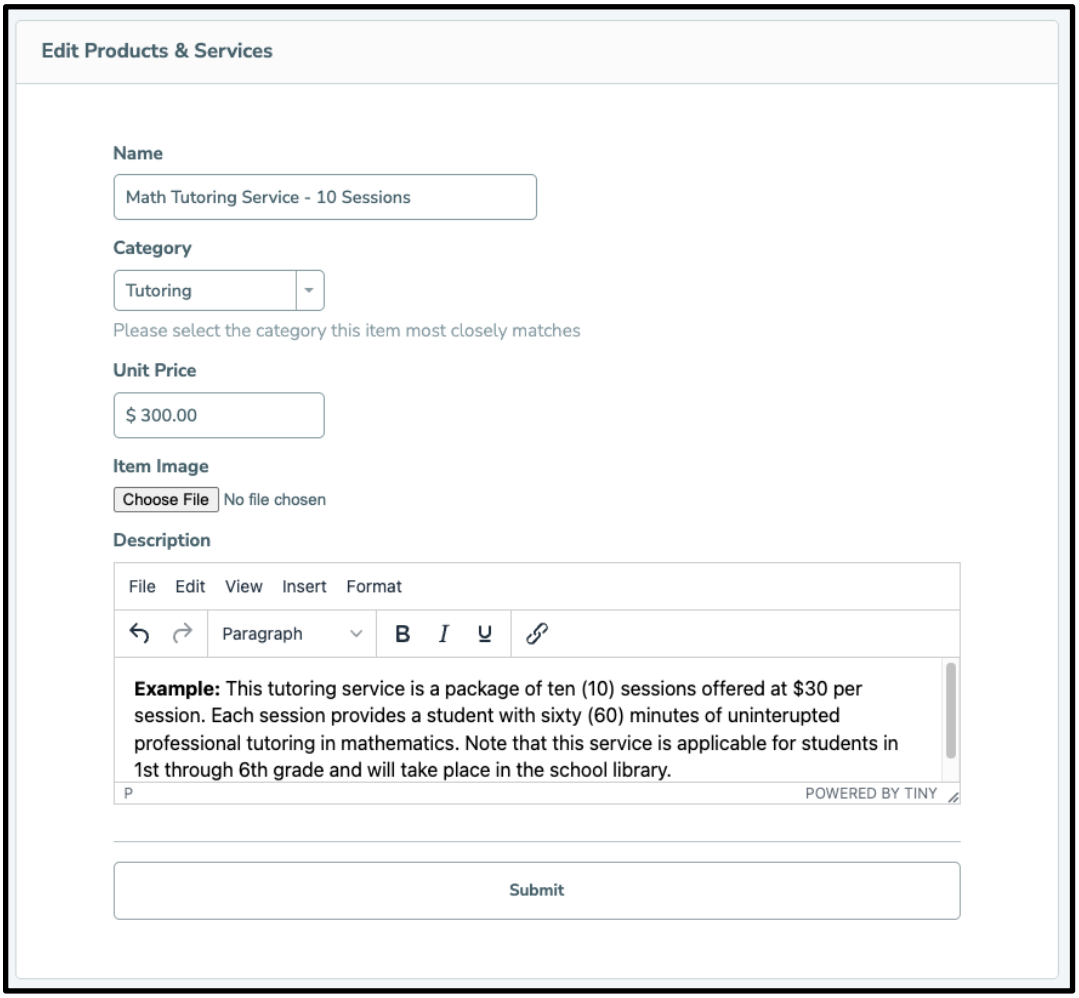
# 11. Closed Marketplace Module for Schools

## Adding Products & Services

- From your Home page, click on the "Products & Services" tab, then select "Products & Services" from the dropdown menu.
    - This will direct you to your School's Products and Services dashboard.
- Click the "Add Products & Services" button to create a new offering.

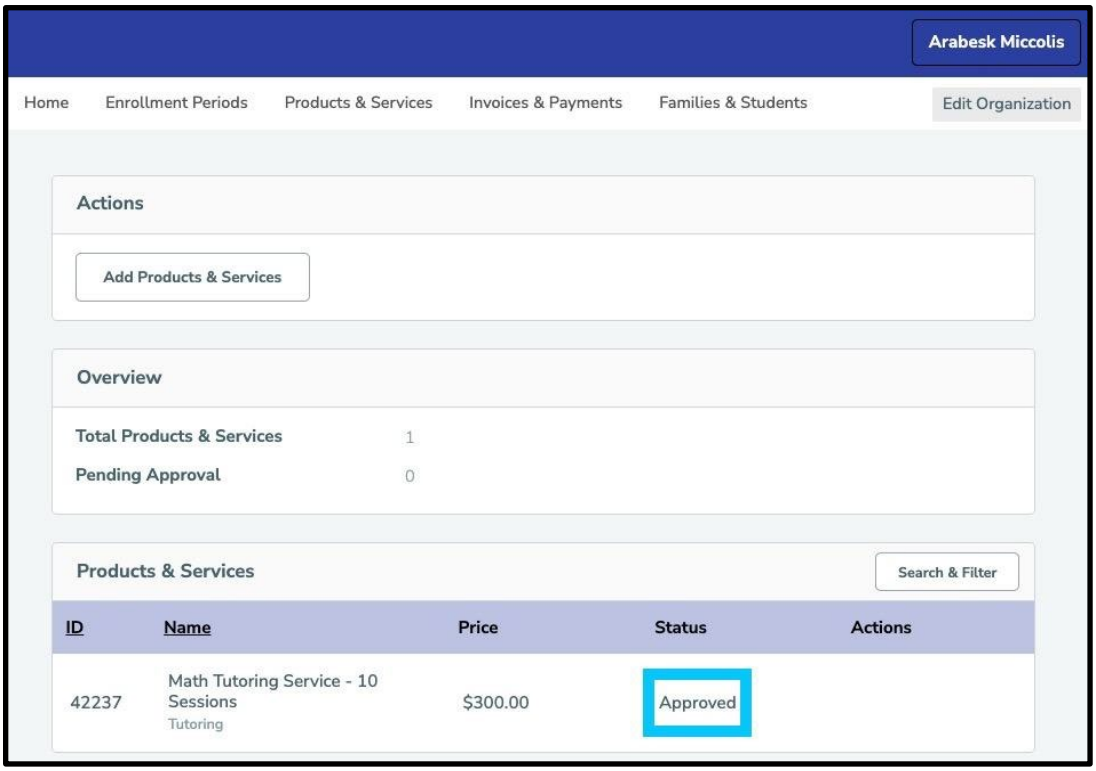


- Complete the product submission form with the following information:
    - Product name
    - Category (select from available options)
    - Price
    - Product images (if applicable)
    - Detailed description outlining exactly what students will receive
        - **Note:** Be specific about age or grade level limits, time units, and any other relevant details
- Review all entered information carefully, then click "Submit".




- **Important:** Your products and services will be reviewed by Hope Scholarship Program administrators before becoming available to families.

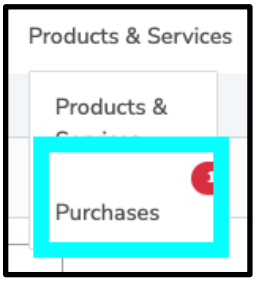
- To check the approval status of your submissions, return to the "Products & Services" section:




**Note:** Approved products will be visible to all Hope Scholarship families, not just those enrolled in your school.

## Managing Orders

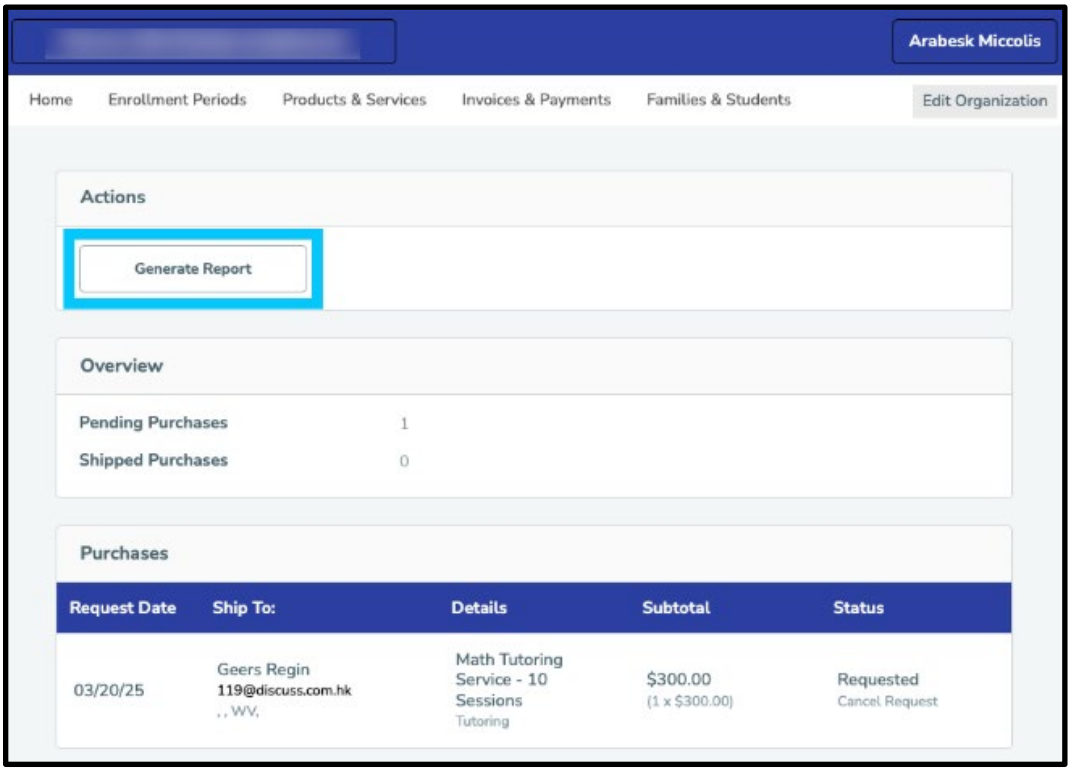
- When families purchase your products or services, you'll receive order notifications in the "Purchases" screen.
    - Access this by clicking the "Products & Services" tab and selecting "Purchases".
- New purchase requests will appear in the main section of this page.



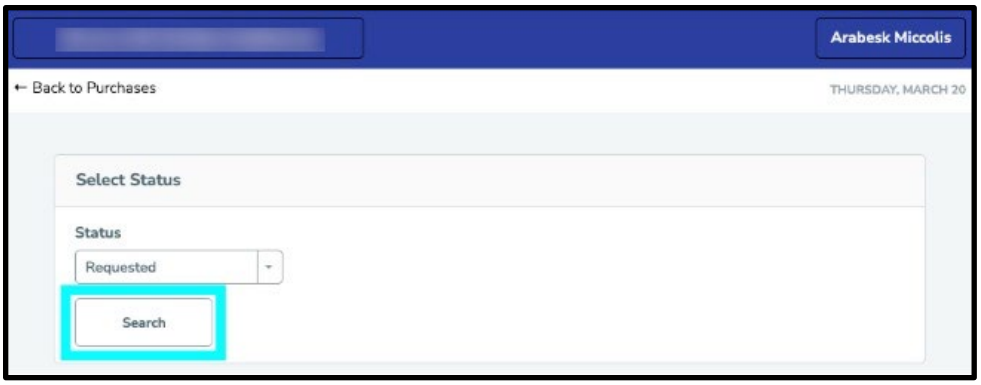
**Best Practice:** Process orders promptly to enhance the family experience and receive faster fund disbursement.

## Generating Invoices for Products & Services

- To receive payment for purchased products and services:
    - Navigate to the "Purchases" drop-down selection under the “Products & Services” tab
    - Click "Generate Report" to begin the invoicing process



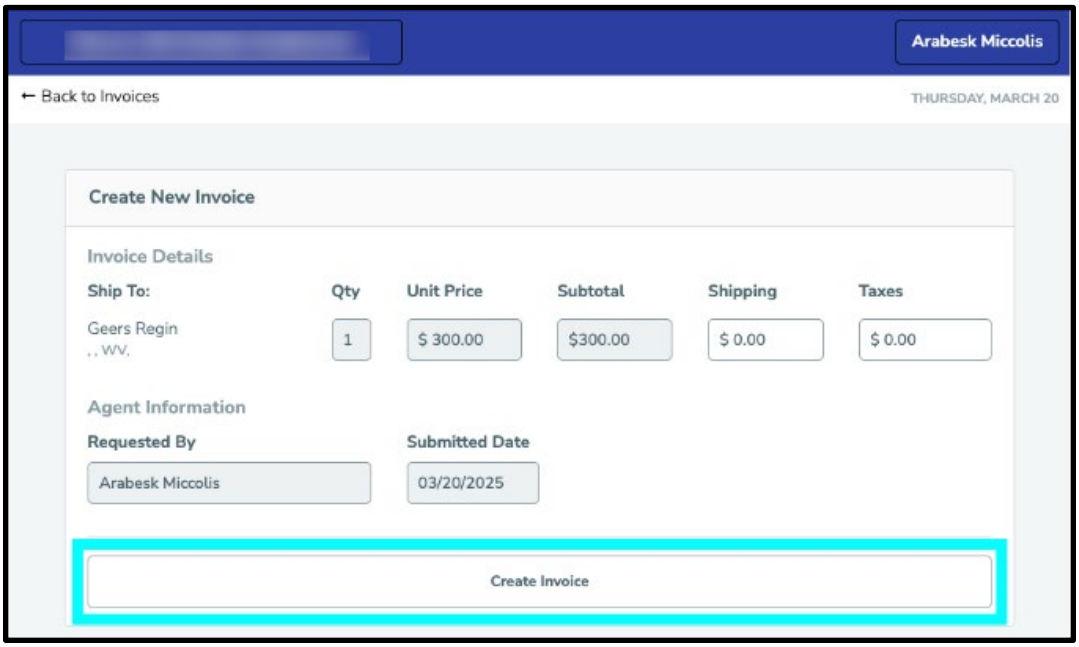

- Use the filter options to locate specific orders:
    - Select the "Requested" status to view new purchase requests
    - Click "Search" to display matching orders




- Select the checkbox next to each purchase you wish to include in your invoice
- Click the "Generate Invoice" button at the bottom of the page

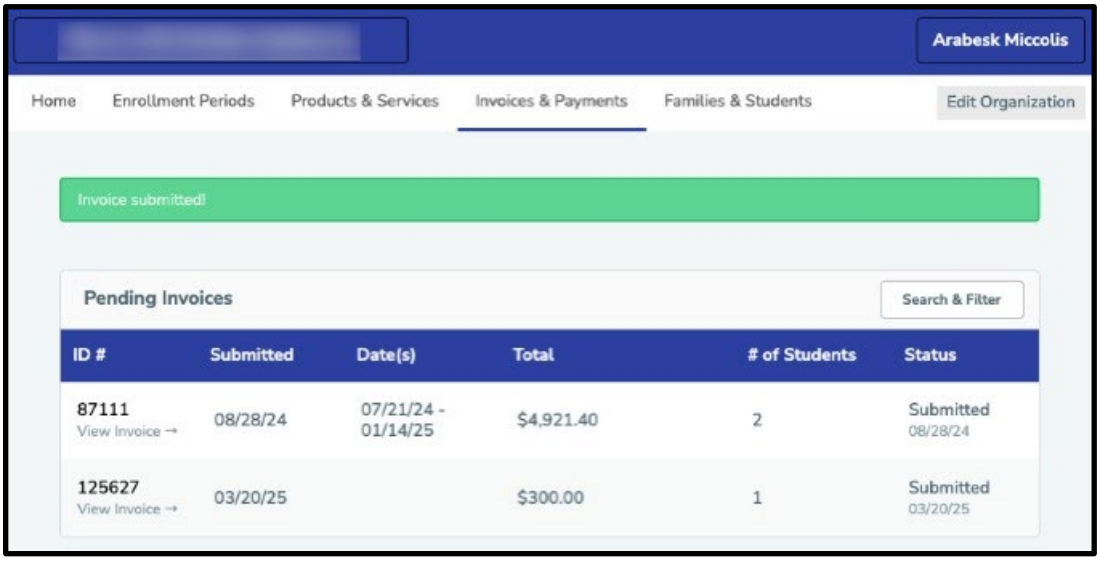
## Submitting Product & Service Invoices

- Review the invoice details carefully, confirming:
    - Student information
    - Order details
    - Total amount
- Add any necessary notes regarding order fulfillment in the comments section
- Click "Create Invoice" when ready



- Once submitted, your invoice will be:
- Reviewed within seven (7) business days
- Payment processed within one (1) business day of approval

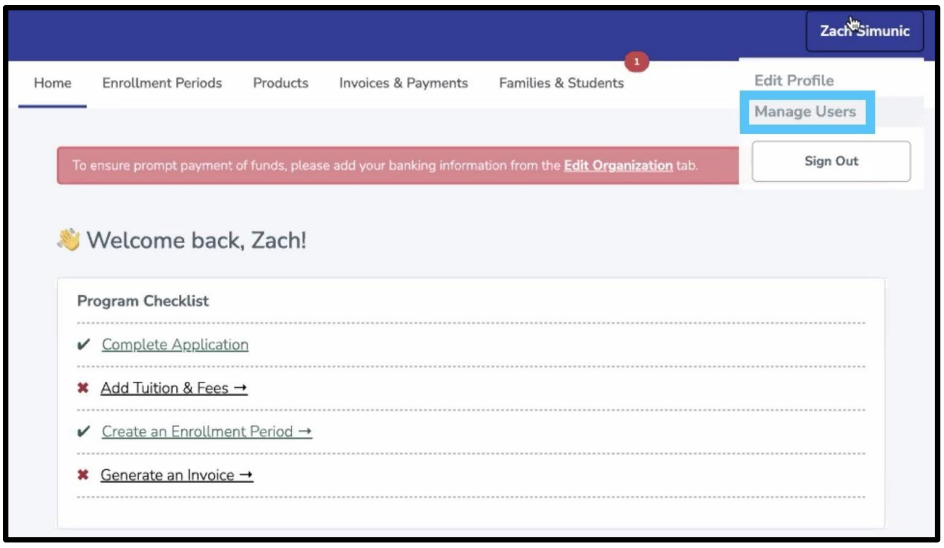
**Important:** Product and service invoices follow a different process than tuition and fee invoices. Always use the "Purchases" tab specifically for marketplace items.



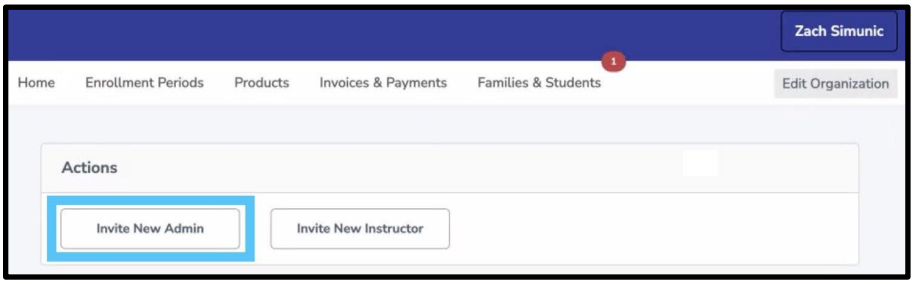

- A green banner with the message "Invoice Submitted!" will appear at the top of your screen, confirming your invoice has been successfully submitted.

## 12. Managing Users

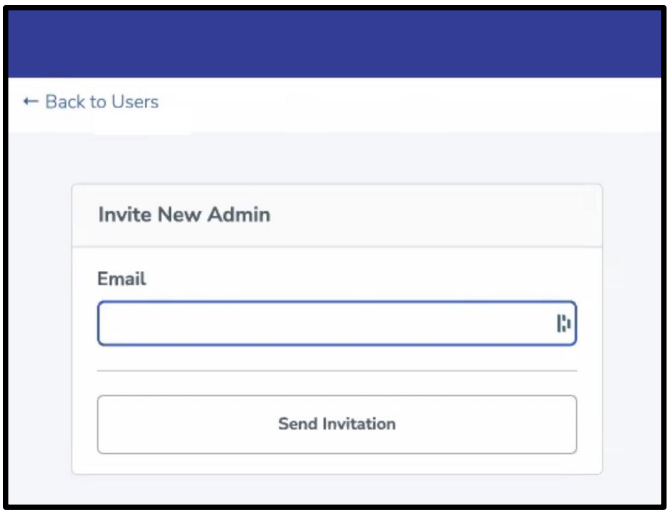
- To access the Manage Users feature:
    - Click on your name in the top right corner
    - Select "Manage Users" from the drop down




- To add additional administrators for your school:
    - On the Manage Users page, click "Invite New Admin"




    - When the pop-up appears, enter the new admin's email address and click “Send Invitation.”
    - The new admin will receive a personalized invitation to the Hope Platform via email. The new admin will have to follow the steps in the invitation email to create their Hope Scholarship online account.

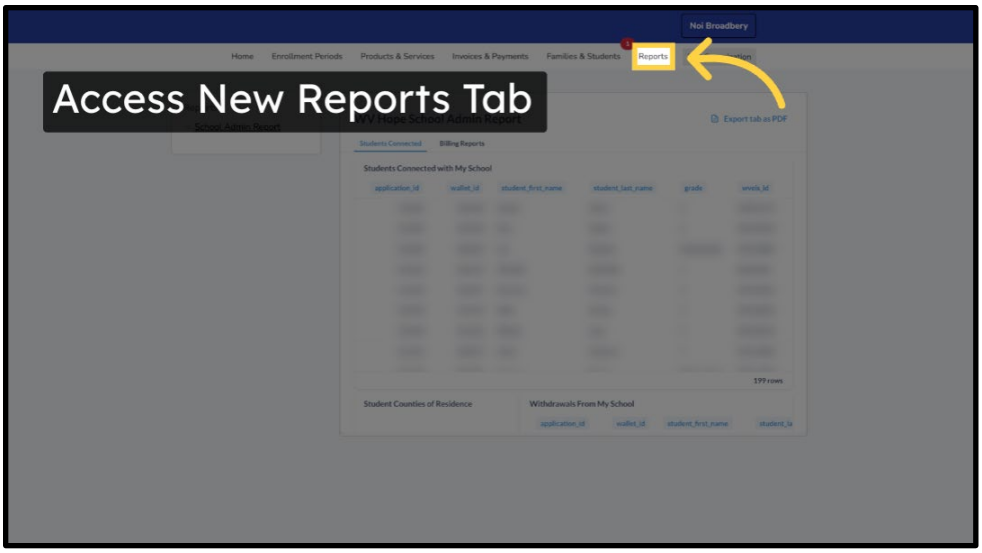



- **Note: Each administrator should have their own account for security and tracking purposes.**

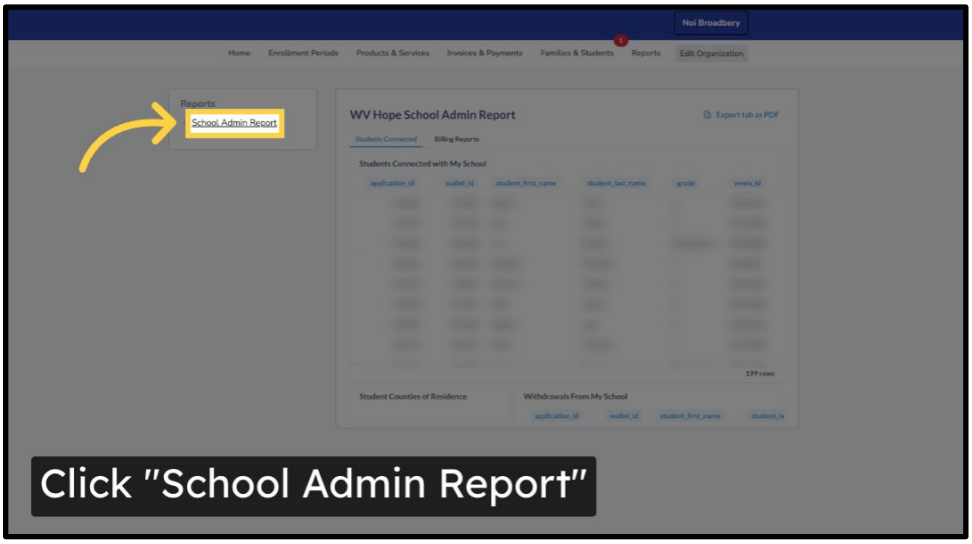
# 13. Reports Feature

**Using the School Admin Report**

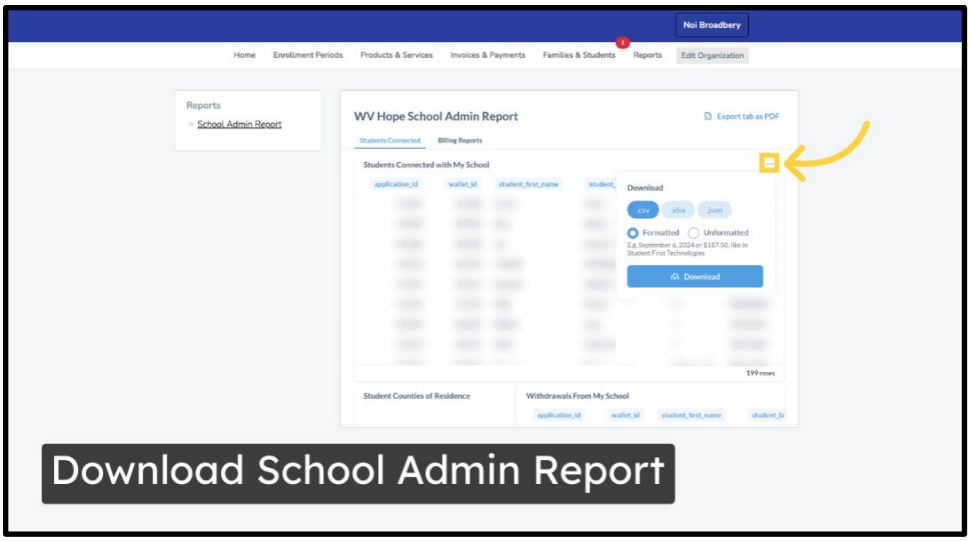
- **Navigate to the Reports Tab**
    - Log into your School Administrator portal
    - Locate and click on the "Reports" tab in the main navigation menu




- **Access School Admin Report**
    - Click on the "School Admin Report" option
    - This will take you to a new page where data can be viewed and exported

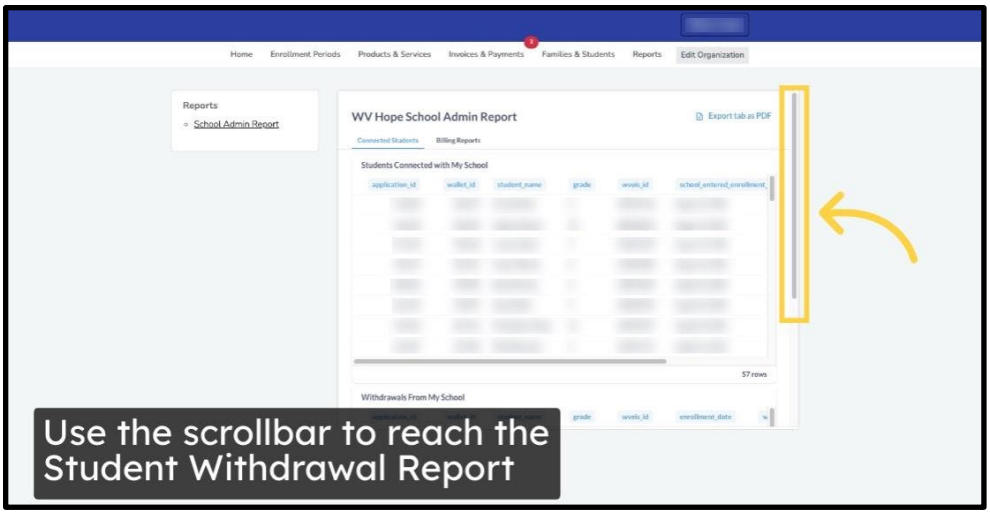



- **Download Your Report**
    - Locate the ellipses (three dots) menu on the report page
    - Click the ellipses to open the download menu
    - Select your preferred format (CSV or Excel)
    - Save the file to your computer




**Accessing the School Withdrawal Report**

- **Navigate to the Withdrawals Section**
    - While on the Reports tab screen, locate the large scrollbar on the right side of your screen
    - Scroll downward until you find the section titled "Withdrawals From My School"
    - This section displays all students who have officially withdrawn from your school

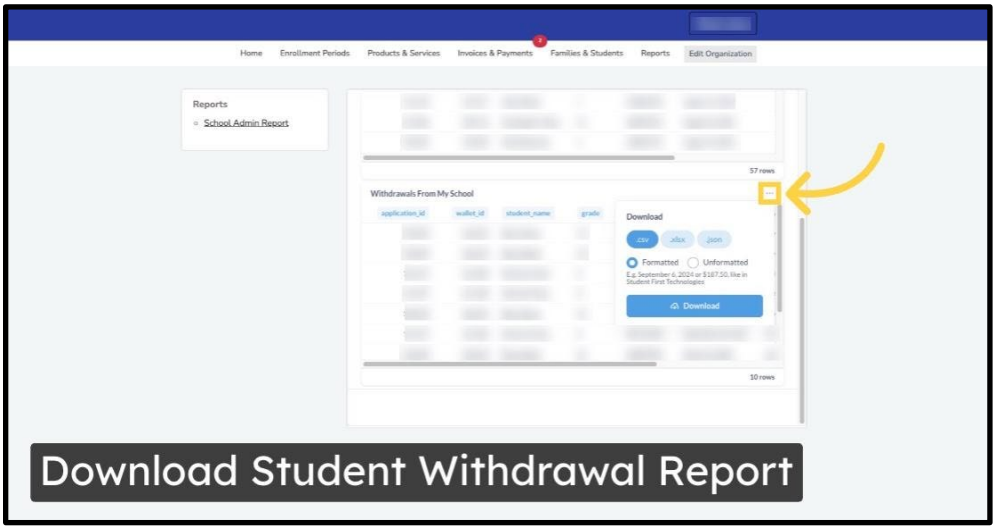



- **Review Student Withdrawal Data**

- The withdrawal report provides comprehensive information for each withdrawn student:
  - Application ID
  - Account (or Wallet) ID
  - Student Name
  - Grade Level
  - WVEIS ID
  - Enrollment Date
  - Withdrawal Date
  - County of Residence

**Download Your Withdrawal Report**

- Locate the ellipses (three dots) button within the withdrawal section
- Click the ellipses to access the download options
- Select "Download results" from the menu that appears
- Choose between formatted or unformatted versions of the report
- Select your preferred file format and save to your computer




**Benefits of the Reports Feature**

- Export student data for your own record-keeping and analysis
- Generate reports needed for submission to County Boards of Education

- Gain deeper insights into your student population
- Better manage enrollment and withdrawal information

## 14. 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).