

Hope Scholarship Program

Provider Portal Guide

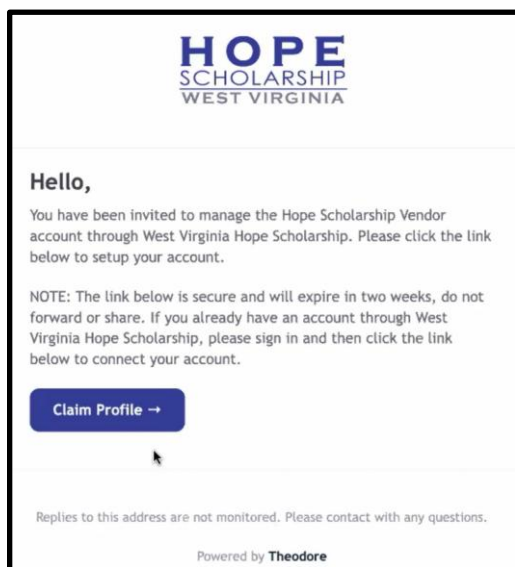
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1. Introduction

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 from invitations@theolearning.com 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 only 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

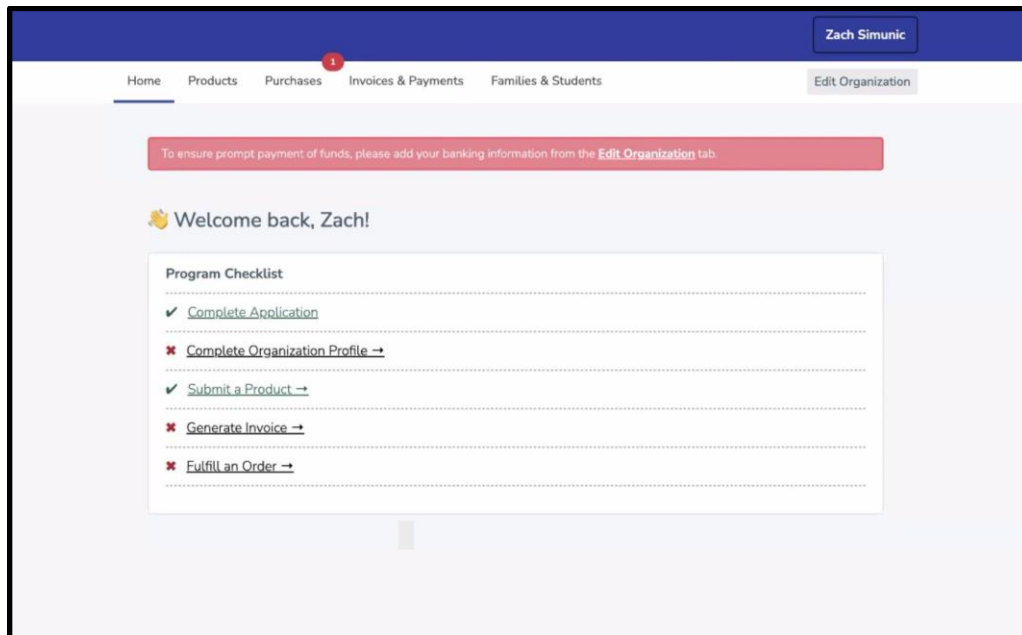
Password

Confirm Password

3. Navigating the Dashboard

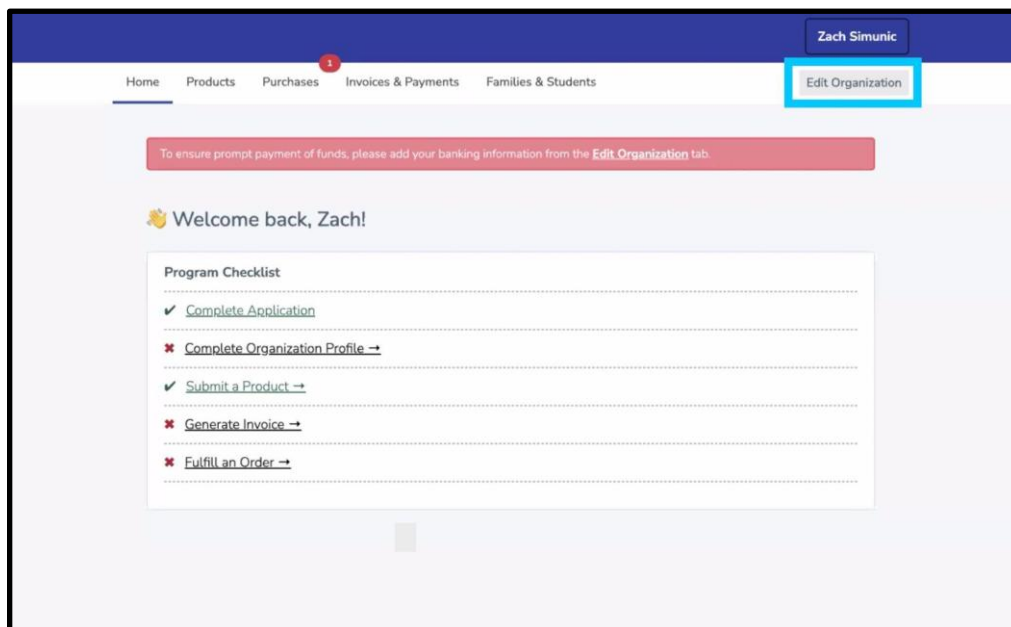
After logging in, you'll see your Provider Dashboard. This is your central hub for managing Hope Scholarship information for your organization. Key areas include:

- Dashboard Locations:
 - Editing Organization Information
 - Connecting Your Bank Account
 - Managing Users
 - Adding Products to the Closed Marketplace
 - Managing Orders and Invoices
- 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 (DBA/Trade 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 ProfileLast updated 07/15/24

Organization or Business Name

Hope Scholarship Vendor

Physical Address

City

State

Zip

Website

Logo

Choose File

No file chosen

View Marketplace Listing →

Banking Information

Connect Bank Account

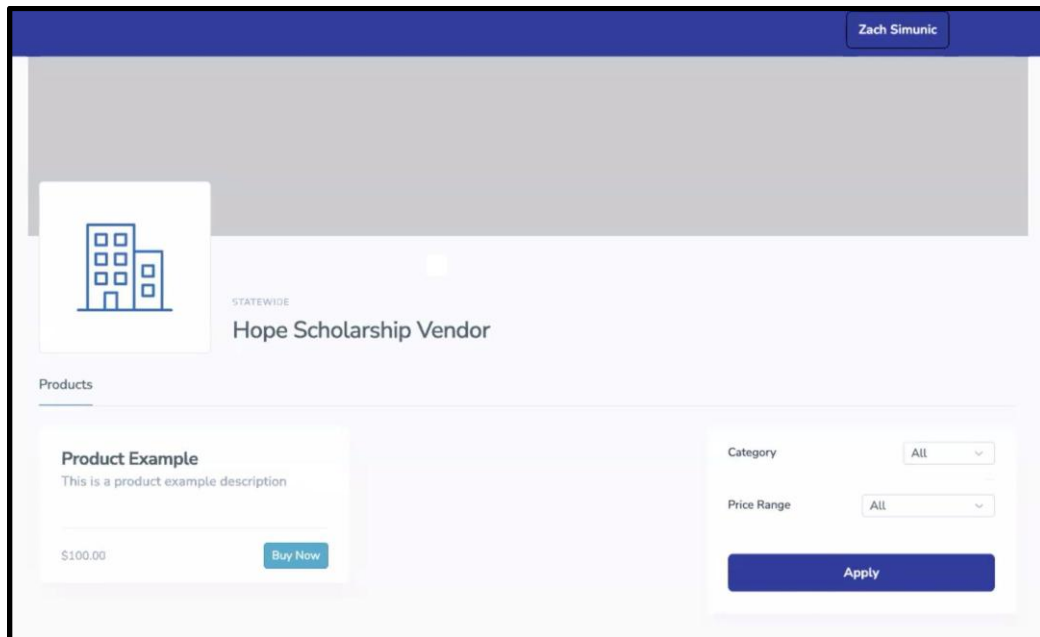
We use **Plaid** to keep your bank details secure. Click **Connect Bank Account** to securely connect your bank account.

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 in the Marketplace.
- When complete, return to your Account Dashboard.

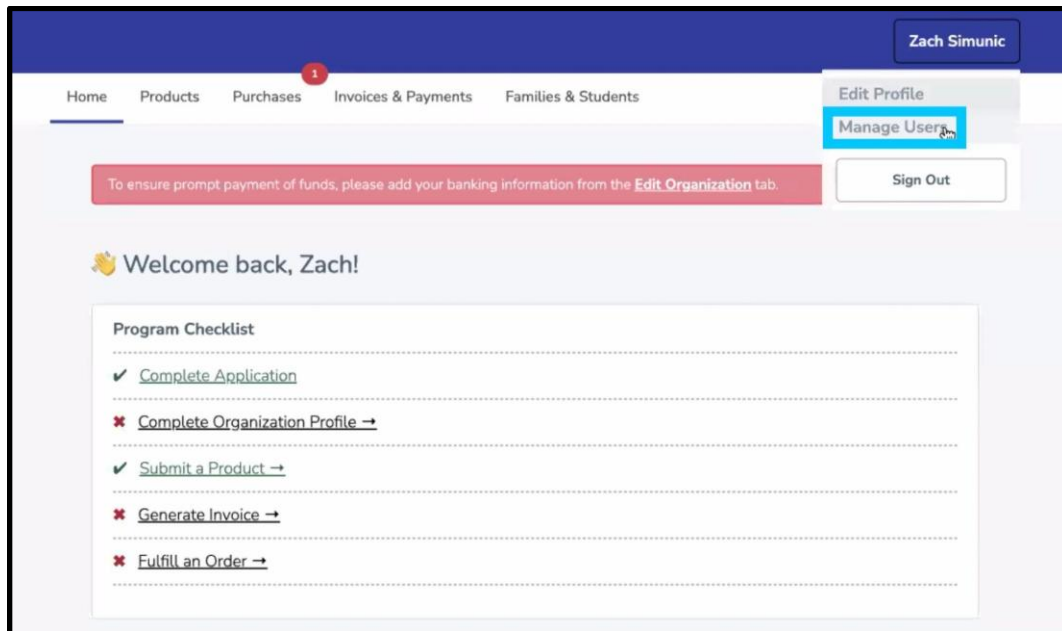


5. Connecting Your Bank Account

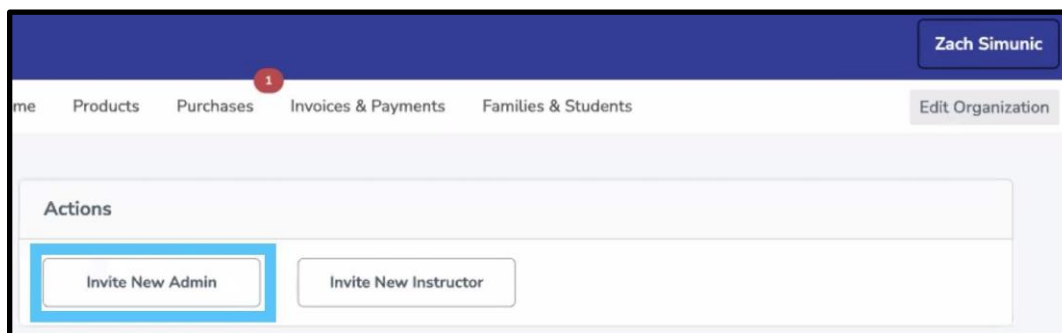
- While in the "Edit Organization" section, scroll down to find the "Connect Bank Account" button.
- To complete the process of connecting your Bank Account in the Hope Platform, please reference this Support Article: [Hope Scholarship Program | Connecting Your Bank Account](#)
- **Note:** This step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

6. Managing Users

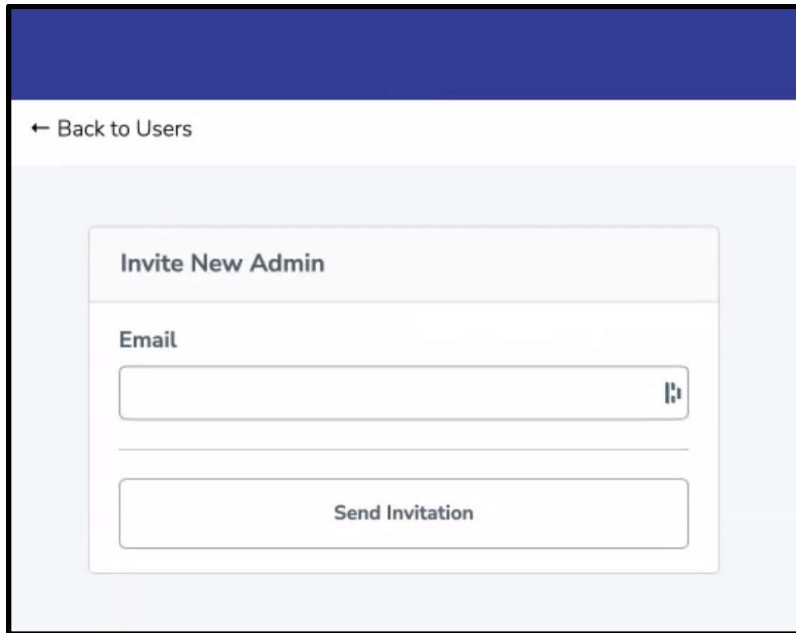
- To access the Manage Users feature:
 - Click on your name in the top right corner of the dashboard.
 - Select "Manage Users" from the dropdown menu.



- To add a new administrator for your organization:
 - 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. The invitation will come from invitations@theolearning.com.



The screenshot shows a web interface with a dark blue header. Below the header is a white bar with a left-pointing arrow and the text "Back to Users". The main content area has a light blue background. In the center is a white box with a light gray border. Inside this box, at the top, is the text "Invite New Admin". Below this is a label "Email" followed by a text input field. To the right of the input field is a small icon of a document with a checkmark. Below the input field is a "Send Invitation" button.

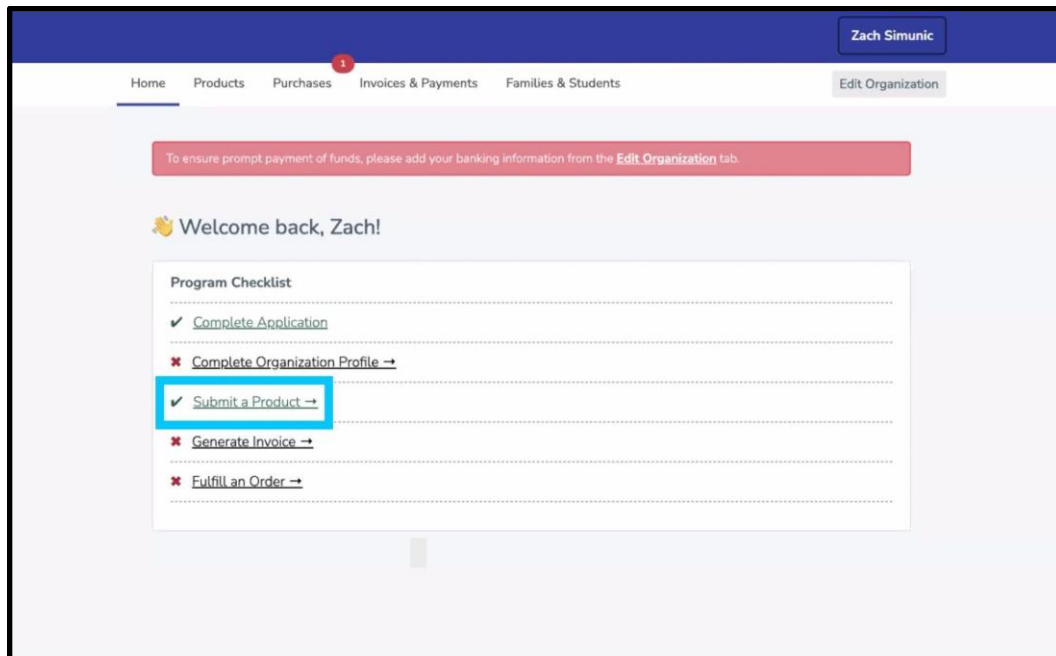
Note: Each administrator should have their own account for security and tracking purposes.

7. Closed Marketplace Module

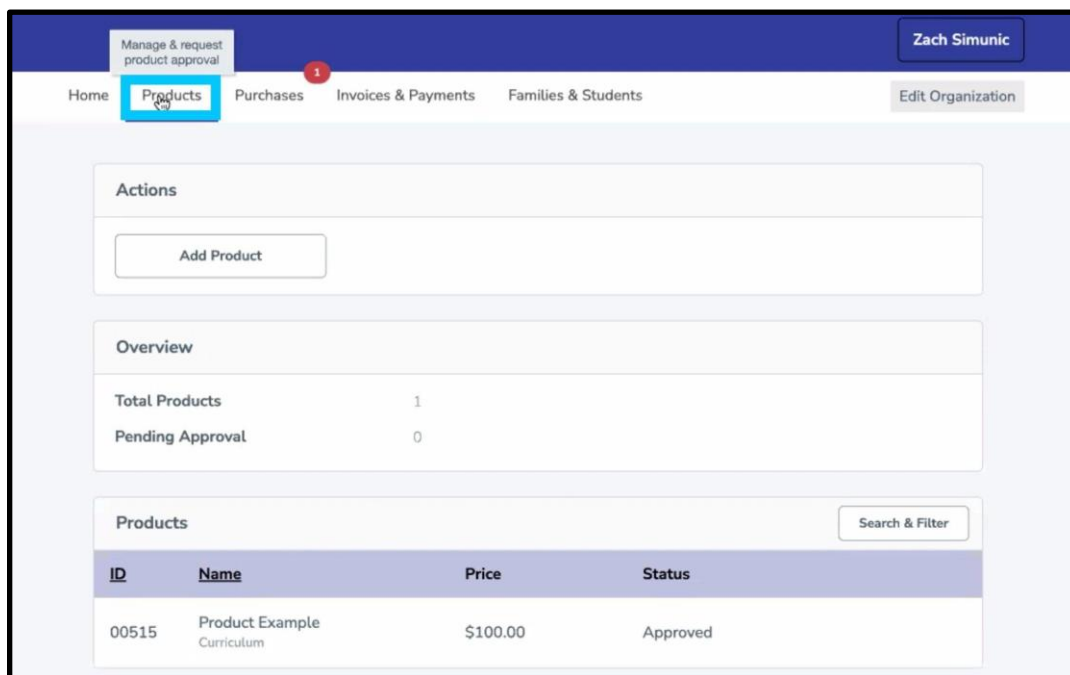
The Closed Marketplace is designed for providers offering services and specific products that require pre-approval. This module instructs you how to list your offerings, manage orders, and generate invoices within the Hope Scholarship platform.

Adding Products and Services

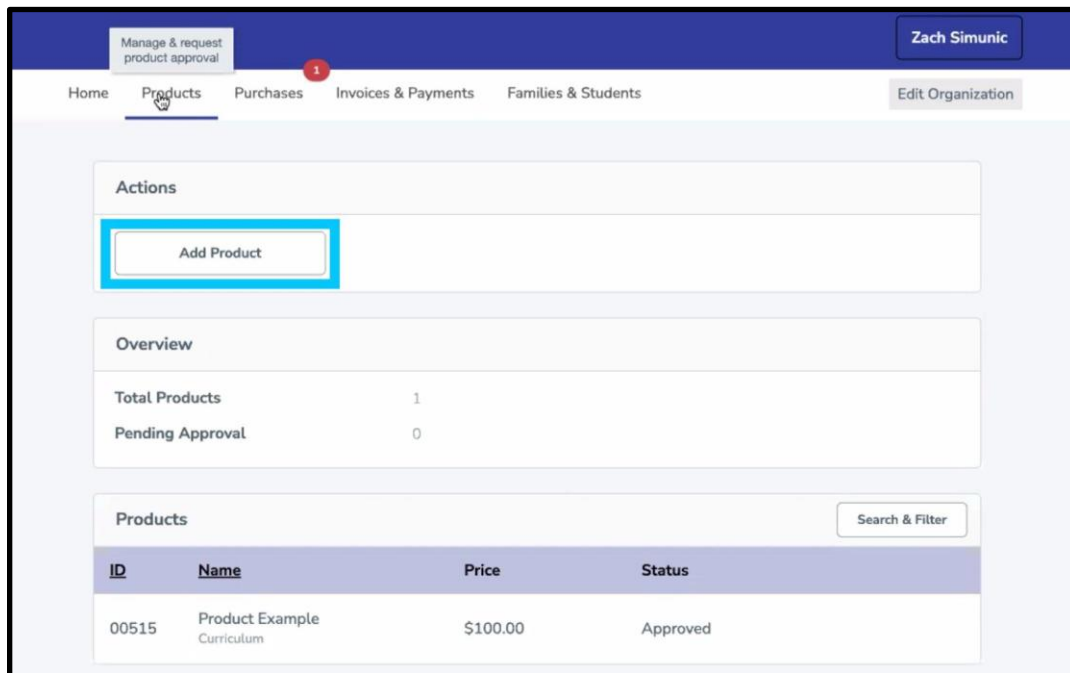
- Navigate to your Home tab and Program Checklist. Once there, click on the “Submit a Product” link to submit a new product or service.



- Alternately, you can access this process by clicking on the “Products” tab at the top of the screen, which navigates to your Products overview page.



- Click the "Add Product" button.



- 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)
 - Resource for "Creating a Service Offering" can be found [here](#)
- Click "Submit" to send your product/service for approval.

Name

Category

Please select the category this product most closely matches

Unit Price

Product Image

Choose File

No file chosen

Description

File Edit View Insert Format

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You can put links to external resources here

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Submit

Product and Service Statuses

Once you submit a product or service offering, it will be reviewed by the Hope Scholarship Board staff to determine whether it meets the criteria for a qualifying expense. Hope Scholarship qualifying expenses can be reviewed in [The Hope Scholarship Education Service Provider Handbook](#).

Each submitted item carries one of four statuses. You can check the status of your submitted items at any time using Search & Filter on the Products overview page.

- **Pending:** Waiting to be reviewed by the Hope Scholarship Board staff.
- **Approved:** The product or service offering is visible to families in the closed Marketplace. Please make sure approved listings stay accurate, and update them annually if needed.
- **Archived:** The product or service offering is hidden from family-facing Marketplace view. You can archive any offering; see Section 8, Editing and Managing Your Products.
- **Rejected:** The offering requires updates before it can be approved. Review the "Rejection Reason" and make the suggested edits.

Add Products

Overview

Total Products

5

Pending Approval

0

Products

Search & Filter

ID	Name	Price	Status
04516	Reach for the Stars: A Hands-On Astronomy Curriculum  Textbooks, curricula, or other instructional materials	\$169.00	Rejected
04515	The Living Land: A Social Studies and History Curriculum  Textbooks, curricula, or other instructional materials	\$129.00	Approved

Editing Rejected Products and Service Offerings

- If a product is rejected, it comes with a reason.
 - **Case Example:** the program administrator flagged that the astronomy curriculum below includes an ineligible entertainment item, a video game.

Product Details	
SKU ID	04516
Product name	Reach for the Stars: A Hands-On Astronomy Curriculum
Category	Textbooks, curricula, or other instructional materials
Unit price	\$169.00
Status	Rejected
Rejection Reason	
Product contains an entertainment item, specifically a video game called "Galaxy Voyager." Entertainment products are not eligible for scholarship fund use. <i>This is feedback from your program administrator. Please address the reason above and resubmit your product for review.</i>	

- Click the "Edit Product" button and make any edits to the Name, Category, Unit Price, and/or Description.

- **Case Example:** the Astronomy curriculum product has been updated to remove the video game and reduced the product cost by \$30.

Unit Price

Item Image
 No file chosen

Description

File Edit View Insert Format
Upgrade

↶ ↷ Paragraph B I U

Reach for the Stars: A Hands-On Astronomy Curriculum (Grades 4 to 7)

Reach for the Stars guides students on a full year of wonder through the night sky, from our solar system to distant galaxies and the lives of stars. Built around observation and hands-on discovery, the course pairs clear, conversational lessons with experiments and projects: building a working model of the solar system, charting the phases of the moon, and assembling a simple telescope to bring the heavens within reach.

The complete set includes an illustrated spiral-bound course guide, a student notebooking journal, a fold-out star chart, a desktop telescope, and a model rocket kit. Designed to be taught family-style for one student or several ages together, it turns curiosity about the cosmos into a year of joyful, hands-on learning.

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tiny

- Once you have completed the edits, click the "Request Item Update" button to resubmit for review.
- After review, the program administrator determines whether the product moves from 'Rejected' to 'Approved' status.

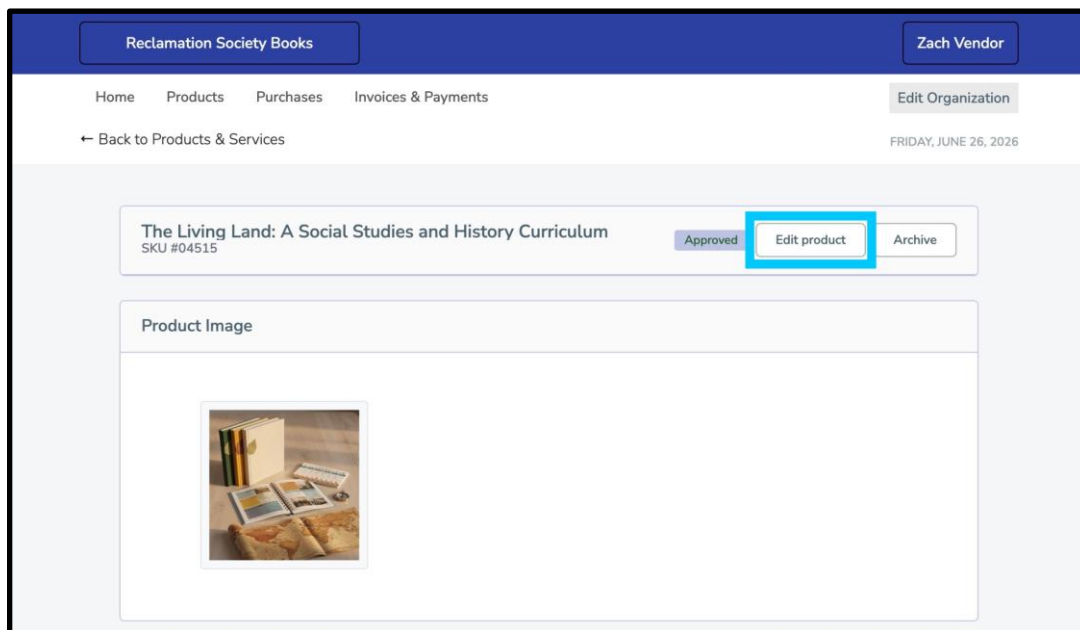
Admin Notes				
This item is approved. Thank you for serving our participating families.				
Product History				
Date	Name	Unit Price	Status	More Info
06/26/2026	Reach for the Stars: A Hands-On Astronomy Curriculum	\$139.00	Approved	+
06/26/2026	Reach for the Stars: A Hands-On Astronomy Curriculum	\$169.00	Rejected	+

8. Editing and Managing Your Products/Service Offerings

Sooner or later you'll need to make a change to a live listing: a new price, an updated description, or a schedule change. This section shows you how to edit, archive, and track your products.

Editing a Product/Service Offering

- Start in your Products section, where every item you've submitted displays its current status.
- Click into any product to view its detail page. The "Edit Product" button appears on items marked Approved or Rejected. A product that is still Pending is locked while it is under review, so wait for a decision before making changes.
- Click "Edit Product", then update the product's name, price, description, category, and/or image. Review your changes and submit.

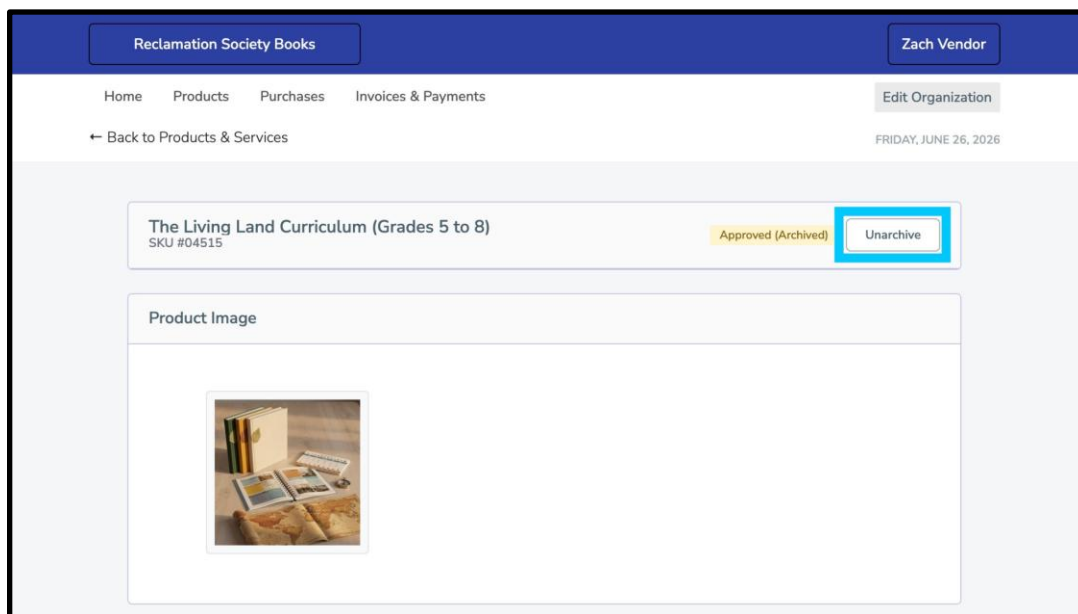


- When you submit an edit to an approved product, it goes to WV Hope program admins as a change request, and your current listing stays right where it is. Families continue to see and purchase your approved version while the new one is under review.

- The program admins will approve or reject your change request. If approved, your product updates with the new information and re-releases into family-facing Marketplace view.
- If you submit a second change while one is still pending, the newer request automatically supersedes the older one. Only your most recent submission is ever in review.
- **Note:** Price changes follow this same change request flow. Purchases are tied to the price at the time they were made, so a later price change never affects existing purchases or invoices.

Archiving and Unarchiving

- Need to pull a product temporarily, such as when an item is out of stock? Use Archive. Archiving hides the product from family-facing Marketplace view, but it stays safely in your account, and past purchases tied to it are not affected.
- When you're restocked, unarchive the product to return it to the Marketplace.



Product History

- Every product has a Product History log on its detail page: a complete, newest-first record of every change since the product was first submitted, including the date, the

name and price at that time, and the status (Approved, Rejected, Pending, Superseded, Archived, or Unarchived).

- Expand "More Info" on any entry by clicking the '+' sign to see the full details of that version.

Product History				
Date	Name	Unit Price	Status	More Info
06/26/2026	Reach for the Stars: A Hands-On Astronomy Curriculum	\$139.00	Unarchived	
06/26/2026	Reach for the Stars: A Hands-On Astronomy Curriculum	\$139.00	Archived	+
06/26/2026	Reach for the Stars: A Hands-On Astronomy Curriculum	\$139.00	Approved	-
Submitting User Zach Vendor				
Approving User Admin User				
Category Textbooks, curricula, or other instructional materials				
Description				
Reach for the Stars: A Hands-On Astronomy Curriculum (Grades 4 to 7)				

Note: If you do not see the "Edit Product" button on an item that has already been reviewed, contact the Hope Scholarship Program team to confirm editing is enabled on your account.

9. Managing Orders and Generating Invoices

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.

Actions

Generate Report

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

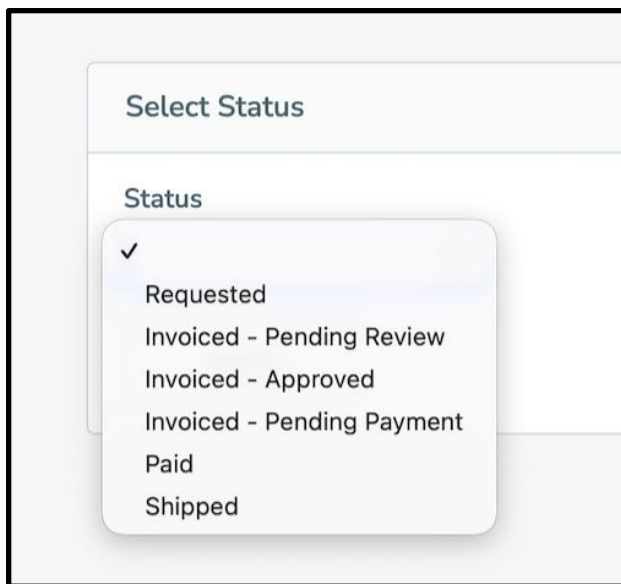
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Purchase and Invoice Statuses

Every purchase moves through a single lifecycle, from the moment a family submits it to the moment you ship it. You can filter by any of these statuses using Search & Filter:

- **Requested:** A brand new purchase submission from a family. These are the orders ready for you to invoice.
- **Invoiced - Pending Review:** An invoice has been submitted and is awaiting admin review.
- **Invoiced - Approved:** The invoice has been approved by admin and is queued for payment.
- **Invoiced - Pending Payment:** Payment is processing.
- **Paid:** The invoice has been paid. Paid items are ready to be marked shipped.
- **Shipped:** The item has been marked shipped (**also known as completed for WV Hope Scholarship purposes**) clearing it from your notification count.

Note: When an invoice is paid, the deposit will appear on your bank statement as THEODOREPMT.



The image shows a user interface for selecting an invoice status. A box titled 'Select Status' contains a dropdown menu. The dropdown is open, displaying a list of status options. The first option, 'Requested', is highlighted with a blue background and a checkmark icon to its left. The other options are listed below it: 'Invoiced - Pending Review', 'Invoiced - Approved', 'Invoiced - Pending Payment', 'Paid', and 'Shipped'.

Generating Invoices

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

Actions

Generate Report

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

- Use Search & Filter to select the status "Requested", then click 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 cancel any requested product/service offering by clicking on Order # and then Cancel Request button in the top right corner.**
- Click each box to the left of the student's name and "Generate Invoice" button at the bottom.
- Review New Invoice one last time before submitting for payment.

- Click on "Create Invoice" to send for payment.

← 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	Submitted Date
Zach Simunic	07/19/2024

Create Invoice

Note: Invoices will be reviewed within 7 days and payment will be processed within 24 hours of approval. After submission, you can track your invoice through the invoice statuses above: Invoiced - Pending Review, Invoiced - Approved, Invoiced - Pending Payment, and Paid.

Cancelling an Invoice

- You can cancel an invoice as long as it has not been updated to "Invoiced - Approved" status.
- Please contact the Hope Engagement Center at 681-999-HOPE (681-999-4673) as soon as possible to cancel the submitted invoice.
- Once the Engagement Center has confirmed the invoice was rejected, it will reappear in your account with the option to edit and resubmit, or to remove it. You may want to "Remove" the invoice if a student cancelled a product/service request.

10. Managing Purchase Notifications

Providers can manage their purchase notifications both before and after invoicing.

Before Invoicing

- Click "Edit Organization" and scroll to the bottom of your profile.
- Choose your own "Purchase Email Preference" setting. This controls how often you receive email notifications when a parent submits a purchase request.
- You can change this setting anytime, so pick whatever fits the way you work. Once selected, click the "Update Profile" button to save your changes.

Banking Information

[Connect Bank Account](#)

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:

Email: Phone:

Purchase Email Preference

Choose how often you receive email notifications when a parent submits a purchase request.

Frequency:

Defaults to "Never" if not selected. No email is sent on days with no purchase activity.

[Update Profile](#)

After Invoicing

- To clear the red bubble notifications over the Purchases tab for products and services that have been completed and paid, click "Generate Report" and search for status "Paid".

Reclamation Society Books
Zach Vendor

← Back to Purchases
WEDNESDAY, JULY 22

Select Status

Status

- ✓ Requested
- Invoiced - Pending Review
- Invoiced - Approved
- Invoiced - Pending Payment
- Paid**
- Shipped

- All products and services that have been paid will need to be marked shipped to clear the notifications.
- Click the box next to each invoice that has been paid and scroll to the bottom to submit "Marked Shipped" (also known as completed for WV Hope Scholarship purposes).

Search

Overview

Invoiced Total \$141.02

Purchases (1 Found) Select All

Family	Product	Quantity	Unit Price	Total
 Theodore Simunic 123 Main Street, Boise, ID, 83705	The Living Land Curriculum (Grades 5 to 8)	1	\$129.00	\$141.02

- This updates your notification number under Purchases to a true count of items still waiting for your attention.

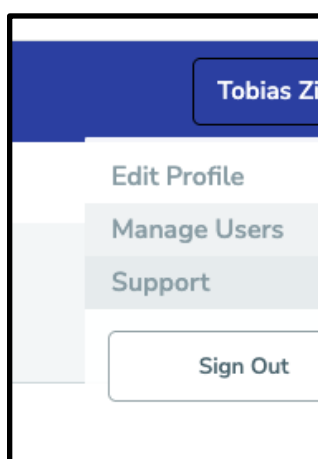
Overview							
Pending Purchases			2				
Shipped Purchases			1				

Purchases							
							Search & Filter
Order #	Date	Student	Parent	Product	Total	Items	Status
167	07/15/26	Theodore Simunic	Zach Parent	The Living Land Curriculum (Grades 5 to 8) Textbooks, curricula, or other instructional materials	\$141.02	1	Shipped
166	07/14/26	Theodore Simunic	Zach Parent	Reach for the Stars: A Hands-On Astronomy Curriculum Textbooks, curricula, or other instructional materials	\$139.00	1	Requested
165	07/05/26	Theodore Simunic	Zach Parent	The Living Land Curriculum (Grades 5 to 8) Textbooks, curricula, or other instructional materials	\$139.73	1	Invoiced - Approved

11. 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 (681-999-4673).

You can also access support directly from the Provider Portal. Click on your name in the top right corner of the screen and select "Support" from the dropdown menu. This takes you to the [Hope Scholarship contact page](#).



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.