



SGOAS

Thank you for joining us! We will begin promptly at 3 p.m. EST you will be muted until then.

**Donation Management Functionality Tutorial
5.28.15**

Agenda and Objectives

- SGOAS Overview (5m)
- Learn how: Donations are Received
- Learn how: Donations are Processed
- Learn how to: Review Donations Received



SGOAS



5 Ways SGOAS Will Change IQE

- 1 Online application submission.** The scholarship application process is completely electronic. Households – or schools – will initiate and track applications from the SGOAS.
- 2 Donations.** SGOAS will provide schools with a real-time list of all donations received. Schools will be able to thank donors as soon as a donation is made.
- 3 Disbursements.** Schools will be able to manage their account as well as request disbursements throughout the year. SGOAS will provide schools with a up-to-date account balance.
- 4 Efficiency.** Schools will be able to view all of their scholarship-related in real-time & all in one place.
- 5 Data Management.** The SGOAS will store historic data pertaining to applications, donations and disbursements.

Key Features

Applications

- ✓ Process household or school –initiated applications
- ✓ Approve applications
- ✓ Track review status

Donations

- ✓ Review received donations
- ✓ Track donation status

Disbursements

- ✓ Request disbursement schedule
- ✓ View up-to-date account status



Reports

- ✓ Custom views by school
- ✓ Dashboards by school



Data Integrations


- ✓ Application, donation, disbursement history
- ✓ Centralized data storage

Getting Started in the SGOAS

Logging in

Once registered, visit:
sgo.i4qed.org/schools/sign_in

Sign In



**INSTITUTE
FOR QUALITY
EDUCATION**

Email

Password

Remember Me

Sign In

[Help! I forgot my password](#)

Homepage

School Admin

Home Applications

Instructions

Getting Started

Welcome to the Institute for Quality Education's Scholarship Granting Organization Administration System (SGOAS)! Here is where your school will manage applications, donations and disbursements regarding the Tax Credit Scholarship. Coming mid-May we will be releasing a functionality that will allow schools to invite as many additional users to the system as they would like. To begin managing your scholarship applications simply click on the **Applications** tab above.

After that...

Over the course of the next couple of months we will be implementing this new system in installments. You will see additional tabs added at the top of this landing page. Please refer to our email notifications for further information and instructions.

To learn more about the Institute for Quality Education, visit www.i4qed.org.

Questions?

Email scholarships@i4qed.org or call (317) 951-8781.

NOTE: For the 2015-16 academic year and beyond, IQE will NO LONGER accept or process paper scholarship applications as we have in previous years. In addition, we WILL NOT be collecting any income verification documentation. At the time a school either submits an application on behalf of a household or approves an application submitted by a household we will request the school to share how the income was verified as well as the desired amount to award the applicant.

Donation Management: Receiving

www.i4qed.org/donate

DONOR RESOURCES

In addition to other services for Indiana students and households, the Institute for Quality Education (IQE) operates a Scholarship Granting Organization (SGO). The SGO awards scholarships to students enrolled in one of our Partner Schools for grades K-12 from Indiana households that meet the income eligibility guidelines. The funds for the scholarships are raised through private donation. Individuals or businesses that donate to the SGO receive tax credits equal to fifty-percent (50%) of the amount donated.

To initiate a donation, please select from the methods below and you will be directed to the corresponding online form.

Links to Donate

[Link](#) One-Time Donation

[Link](#) Recurring Monthly Donation

[Link](#) Stocks/Securities *

* The tax credits from a stock or securities donation will be based upon the cash value of the completed transaction - we will liquidate the donated items immediately upon receipt. If you select this option, you will receive an email with instructions immediately upon the submission of the online donation form.

Select Schools

General Fund

\$

[Add Another](#)

On the form, donors can select to restrict their donation to one or more schools

Yes, please email me my TCCN number when it is issued 

Submit Payment

If donors choose to receive their TCCN via email it will be sent once it has been created by the INDOR. If they uncheck this button they will receive their TCCN via mail.

[Sign In](#)

[Create an Account](#)

[Donate](#)

[IQE Homepage](#)

[Help](#)

Sign Up

First Name

Last Name

Email

Password

Confirm Password

[I already have an account, take me back to sign in](#)

For reoccurring and stock/security donations, donors will be required to create and account.

One-time donors will be given the option of creating an account after they've submitted their donation.

Donor Portal

FRIDAY, MA

Actions

One Time Donation

Monthly Donation

Stock Donation

Cash Donation History

ID	Date	Amount	Type	Method
00002	5/22/2015	\$200.00		Credit Card
00001	5/13/2015	\$200.00	One Time	Credit Card

Stock Donation History

ID	Date	Amount	Brokerage
00001	5/18/2015	\$500.00	TEST

Process

- Donation received via online or paper
- SGO will sent INDOR request for TCCN
- Once TCCN is generated, SGO will update donations with TCCN
- Donor will receive TCCN via email or mail based on preference

Next Steps

Implementation
Schedule This Month

June 8th: School Set-Up Forms will be live

June 29th: Disbursement Functionality will be live

Review Donations

Donations received after May 26th will appear in the system. All donations will be viewable by July 1st.

Email:
scholarships@i4qed.org
with questions

Other News/Updates:

- Print Materials
 - IQE has one-pagers outlining the voucher and tax credit scholarship eligibility requirements in English and Spanish. Email contact@i4qed.org for electronic copies.
- Opportunity Calculator
 - The Opportunity Calculator is a free tool that makes it easy for families to understand their school choice options. Users may review schools in their area, determine their eligibility in the school voucher and TCS program as well as learn about how to enroll. **Visit: myschooloptions.org.**
 - **From your school's site, you may link directly to the calculator portion with the following URL:**
<http://www.i4qed.org/calculator/qualify>
- GreatSchools.org Partnership
 - A free marketing tool for your school and a free resource for your parents! **Visit greatschools.org/osp to register your account and update your profile!**
- Catalyst for Quality Grant
 - June 1st IQE will begin accepting applications for the Catalyst for Quality Grant. IQE will award up to \$2,500 to teachers fund an innovative, data-driven idea.

Visit: www.i4qed.org for more information!