



The Institute for Quality Education (IQE) is proud to introduce our partner schools to our Scholarship Granting Organization Administrative System (SGOAS). This system will be implemented in a series of installments. Our staff is committed to supporting our partners throughout the implementation process. Once fully implemented, partner schools will also have the ability to manage donations and disbursements.

Below we have provided an outline of the implementation schedule:

**May 26** - The 'donation management feature' was initiated. All donations will appear in your school's portal as they are received. (**This will not include** any donations made prior to May 26<sup>th</sup>. All historical data will be added by July 1<sup>st</sup>.)

**May 28** - IQE will host another WebEx from 3 - 4 p.m. EST to walk you through the donation administration feature. Join online [here](#) or from your phone at +1 (571) 317-3131.

**June 8** - You may begin filling out school setup forms online and invite other users to join the school's account. An announcement will be sent to you when this feature is activated.

**June 29** - Schools can utilize the disbursement functionality to request payment and review an account balance in real time.

**July 1 - Online system will be fully operational and loaded with all necessary data elements.**



## Implementation Launch #2: Donation Management

The SGOAS allows schools to post and review donations received in real time. The SGOAS also provides a view of all donation activity. As soon as a donation is entered into the system (whether via an online donation or paper form) IQE will request a Tax Credit Certification Number (TCCN) from the Department of Revenue. Once a TCCN number has been assigned to the donation, IQE will generate receipt letters for donors along with their TCCN for tax purposes. Donors will be given the option to have this letter emailed to them.

Donors will be given the choice to create an account on the SGOAS (if donating stock, securities or recurring gifts, creating an online account is required; otherwise, setting up an online account is optional). If an account is created, donors will be able to view past donations, download donation receipts, and edit recurring donations as shown below.

**Data on donations received prior to May 26, 2015 will be loaded into the system and available to view starting July 1, 2015.**

The SGOAS will support the following forms of donations:

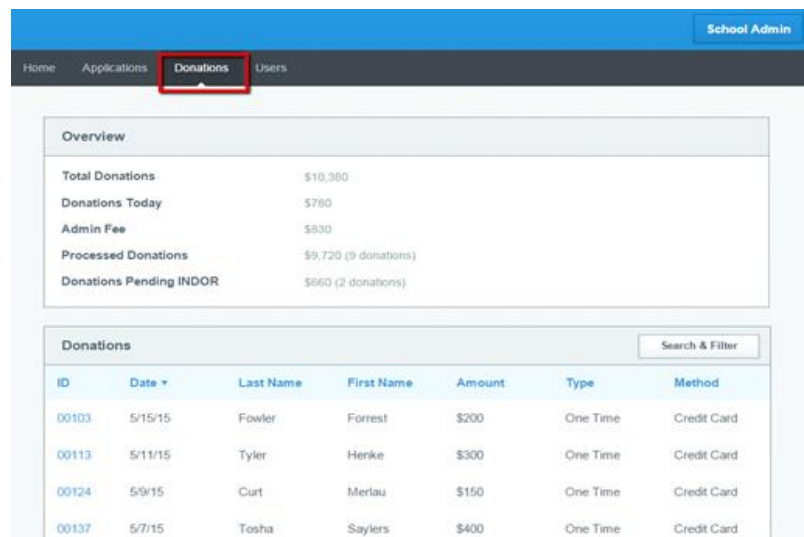
- **Online donations:** Online donations are initiated by the donor via IQE's online donation page ([i4qed.org/donate](http://i4qed.org/donate)) or by clicking on 'DONATE' from the [i4qed.org](http://i4qed.org) page). The donor may process a one-time transaction or set up reoccurring transactions. Donors will have the opportunity to designate their donation to a school(s) or to the general fund. Once submitted, the SGOAS will put the donation in a 'certification required' status and will ask the Department of Revenue to provide a TCCN. If monthly or multiple donations are made, IQE will request a TCCN for each. Once the TCCN has been received IQE will update the record and place the donation in a 'completed' status. An email or letter will be generated and sent to the donor with their TCCN listed for tax purposes.
- **Paper donations:** Upon receipt, IQE will process checks accompanied with the official IQE Donation Form, entering the donor and donation information into the SGOAS. Partnering schools will be able to view information in real time under the 'donations' tab. Donations received without a donation form will be placed in a 'pending' status until the proper information is collected. Once the donation information is received, IQE will move the donation into a 'certification required' status and ask the Department of Revenue to provide a TCCN. If monthly or multiple donations are made, IQE will request a TCCN for reach. Once the TCCN has been received IQE will update the record and place the donation in a 'completed' status. An email or letter will be generated and sent to the donor with their TCCN listed for tax purposes.
- **Stock/Security donations:** IQE provides donors with the opportunity to donate stock or securities online or via paper. To submit, donors can visit [www.i4qed.org/donate](http://www.i4qed.org/donate) and click "stocks/securities." To submit through the mail, donors should complete the IQE donation form and mail it to IQE directly. IQE staff will contact the donor's broker to complete the donation. An email or letter (whichever you have designated) will be generated and sent to the donor with their TCCN listed for tax purposes.

## Viewing Donations Received

**Step #1:** Log into the SGOAS by visiting [www.sgo.i4qed.org/users/sign\\_in](http://www.sgo.i4qed.org/users/sign_in) and entering username/password you created during the first implementation phase. (NOTE: If you need to create an account please email: [scholarships@i4qed.org](mailto:scholarships@i4qed.org))

**Step #2:** Click on the 'donations' tab from the home page.

**Step #3:** The table (as shown below) will provide you with a comprehensive overview of every type of donation that has been received in real time as well as detailed information on individual donations. Users may sort each column to reorganize the data for review. School administrators may also download a list of donations into an Excel document by clicking on 'download' below the donations table.



The screenshot shows the 'Donations' page in the SGOAS system. At the top, there is a navigation bar with 'Home', 'Applications', 'Donations' (highlighted with a red box), and 'Users'. A 'School Admin' button is in the top right. Below the navigation is an 'Overview' table with the following data:

Overview	
Total Donations	\$10,380
Donations Today	\$780
Admin Fee	\$830
Processed Donations	\$9,720 (9 donations)
Donations Pending INDOR	\$660 (2 donations)

Below the overview is a 'Donations' table with a 'Search & Filter' button. The table has the following columns: ID, Date, Last Name, First Name, Amount, Type, and Method. The data rows are:

ID	Date	Last Name	First Name	Amount	Type	Method
00103	5/15/15	Fowler	Forrest	\$200	One Time	Credit Card
00113	5/11/15	Tyler	Henke	\$300	One Time	Credit Card
00124	5/9/15	Curt	Merlau	\$150	One Time	Credit Card
00137	5/7/15	Tosha	Saylers	\$400	One Time	Credit Card



This is a detailed view of the 'Overview' table from the screenshot above. It contains the following data:

Overview	
Total Donations	\$10,380
Donations Today	\$780
Admin Fee	\$830
Processed Donations	\$9,720 (9 donations)
Donations Pending INDOR	\$660 (2 donations)

(See next page for explanation)

**Total Donations** = total amount of gross donations received  
**Donations Today** = real time calculation of donations designated to your school that day  
**Admin Fee** = SGO fees collected from total donation amount  
**Processed Donations** = number of fully processed donations to date  
**Donations Pending IDOR** = amount of donations yet to receive a TCCN from the IN Department of Revenue.

The SGOAS will create a profile page for every donor that will display more of the donor's information related to a specific transaction. To access the profile page, click on the ID number in blue on the far left as shown below.

00124	5/9/15	Curt	Meriau	\$150	One Time	Credit Card
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