

The Institute for Quality Education (IQE) is proud to introduce our partner schools to our SGO 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 remaining implementation schedule:

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

Implementation Launch #3: Disbursement Management

The SGOAS allows schools to review their balance available to award in scholarships, as well as the amount certified for disbursement.

Disbursement Landing Page

Step #1: Log into the SGOAS by visiting www.sgo.i4qed.org/users/sign_in and enter the username/password you created during the first implementation phase.

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

Step #3: The disbursement landing page features an action, overview, and disbursement history table as shown below.

The screenshot shows the SGOAS Disbursement Landing Page. At the top right, there is a 'School Admin' button. Below this is a navigation bar with 'Home', 'Applications', 'Donations', 'Disbursements', and 'Users'. The 'Disbursements' tab is selected. Below the navigation bar, there are three main sections:

- Actions:** A button labeled 'Request Disbursement'.
- Overview:** A table showing financial metrics:

Total Amount Certified	\$15,500
Available for Disbursement	\$30,500.00
Pending Disbursement	\$15,500.00
Amount Disbursed	\$0.00
- Disbursements:** A table showing disbursement history:

Submitted On	Type	Amount	Status
06/24/2015	One Time	\$15,500.00	Pending

The **action table** features the 'Request Disbursement' button.

The **overview table** outlines the following:

- Total Amount Certified: Amount requested from approved applications.
- Available for Disbursement: Amount available after subtracting administration fee from donations received. Credit card processing fees are paid by IQE.
- Pending Disbursement: Amount pending disbursement.
- Amount Disbursed: Amount previously disbursed.

The **disbursements table** outlines the history of disbursements and organizes each request by date submitted, type, amount, and status.

Requesting a Disbursement

Step #1: Click the 'Request Disbursement' button from the action table on the landing page.

Step #2: The SGOAS will determine whether or not enough funds are available to cover the entire amount certified (total funds requested from approved applications).

- a. If the school has enough funds available to cover the total amount certified from the approved scholarships, two disbursement options will be provided:
 1. One-time disbursement: The school selects preferred disbursement date (cannot be less than 72 hours from time of request).
 2. Fall or spring disbursement: The school submits two different dates (one fall and one spring). The school may still select a spring date even if funds available don't cover the spring disbursement at the time of the request. The SGO will not process spring disbursements until all funds are available.

The screenshot shows a web interface for a school administrator. At the top right, there is a blue bar with the text 'School Admin'. Below this, on the left, is a link '← Back to Disbursements' and on the right, the date 'WEDNESDAY, JUNE 24'. The main content area is titled 'New Disbursement Request'. A green banner at the top of the form area says 'YOU HAVE ENOUGH TO COVER YOUR CERTIFIED APPLICATIONS.' Below this, the form has several fields: 'Type *' with a dropdown menu showing 'One Time' selected and 'Fall/Spring' as an option; 'Amount' with a text input field containing '\$ 15,500'; and 'Disburse Date' with three dropdown menus for month (June), day (24), and year (2015). At the bottom of the form is a large button labeled 'Submit Disbursement Request'.

- b. If the school has enough available funds to cover at least half but not all of the total amount certified, two disbursement options will be provided:
 1. Fall or spring disbursement: The school submits two different dates (one fall and one spring). The school may still select a spring date even if funds available don't cover the spring disbursement at the time of the request. The SGO will not process spring disbursements until all funds are available.

2. Monthly: By selecting this option, the school instructs the SGO to use any available funds and issue a disbursement monthly. The SGOAS will prioritize which applicants to disburse. The following month, if new funds become available, the SGOAS will resume moving down the list of approved recipients. This will continue each month until all awards for that academic year have been disbursed.

School Admin

← Back to Disbursements WEDNESDAY, JUNE 24

New Disbursement Request

YOU DO NOT HAVE ENOUGH FUNDS TO COVER YOUR CERTIFIED APPLICATIONS AT THIS TIME. PLEASE SELECT A MONTHLY, OR FALL/SPRING DISBURSEMENT DATE AND YOUR FUNDS WILL BE RELEASED AS THEY ARE AVAILABLE.

Type *

Fall/Spring ▾

Amount

Fall Disburse Date **Spring Disburse Date**

Month ▾ Day ▾ Year ▾ Month ▾ Day ▾ Year ▾

Submit Disbursement Request

Step #3: The SGOAS will send an email notification to the SGO within 72 hours of requested date(s). On the requested date, the SGO will view requests. Disbursement statuses will then be updated to 'Disbursement Made.'

The SGO will then mail a check and PDF of the disbursement roster to the school.

Managing Disbursements

As disbursement requests are made, and approved, in the SGOAS each record will be assigned a status code.

Status explanations:

'Disbursement Pending': Displayed once approved recipient's award amount is requested

'Disbursement Made': Displayed once disbursement has been completed

NOTE: A record of disbursement requests can be found from disbursement landing page.

Schools wishing to increase award amount for recipients must contact the SGO with name(s) of the applicants and the amount to add to their award.

If a recipient is no longer enrolled, the school must contact the SGO with the name(s) of the applicant as well as any relevant details.