SEC School Portal

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General

Welcome

Welcome to the Scholarships for Education Choice partner school portal. The purpose of this site is to give schools access to the database that we use to store donor and student information for your school. While we are excited about the many features that we can offer through this site, please understand that your access is more limited than ours is (for security reasons, the things you can see and edit are controlled). It is our desire to provide you with the most up to date information

possible, while keeping the data secure. If there is information you need and are not seeing, please call or email and we will get it right to you.

Logging In

1. You will receive an email invitation to your school's portal. From there, you will set your password. Please SAVE THE URL to log in to the portal in the future.
   https://sagamore.force.com/secportal
2. Note that Weekly Donation Activity reports and Month End donation reports will still be generated and sent via email.

Helpful Tips

- There are LOTS of places to click! Anything that is blue and looks like a hyperlink is clickable. We have included some places to click in order to view quick videos that help with navigating. Have fun exploring!
- Many of the tabs will take you to what is called a list view. You can change the order that things appear in the list view by clicking on a column header. You can also adjust the width of the columns by clicking in between the column headers. There are a few different list views available to you. To get to those click the down arrow. Click the Pin button to save your favorite list view. You cannot export or create a report from a list view. Go to the Reports tab to do that.
    - HINT: Sometimes the list view cuts off the name of the column header and leaves a … When you hover over the header, it will show you the full column name.
- We have added frequently used forms and documents on the Home screen. If you look under the Welcome message you will see tabs where you can access the forms and documents you may need.
- You may notice that there are numerous ways to get to information on the portal. For example, if you wanted to see the student "contact" record, you could either go to the Students tab and select their name, or you can click on their name in the award detail record. When you are in the student contact record you will be able to see current and past awards. You can click into any of these to see details. Similarly, you can see donor information on either the donor tab or within the donation tab information.
- Please let us know what you need if you can't find it!!!

Description of Tabs

Home:

The Home tab displays your available balance and has some charts and graphs that display summary information about your account.

Dashboard: The Dashboard is set to Refresh once per week so you may want to get in the

habit of clicking refresh when you first login if you are interested in seeing the totals represented in the dashboard. You can click on any of the reports that are represented in the charts for more detail and to export the report.

Portal FAQ's: Be sure to check out the FAQ's and let us know if you have a question that isn't addressed! The questions with blue text link to a short video that will show you how to navigate the answer to the question.

Forms and Materials: You will find a tab for Donor Forms and Materials and one for Student/Parent Forms and Materials, just follow the links!

Contact us: There is a button at the bottom of the page if you need to ask a question or get in contact with us.

Donations:

The Donations tab is a listing of the donations the school has received. Our system refers to a Donation as an Opportunity. You can change the order in which they appear by clicking a column heading. For example, if you click the Close date Column it will sort by oldest at the top, click the column header again and it will sort with the newest donation at the top. You can see the donor name, amount, admin fee and the stage. To see more detail about the donation itself click the link in the Opportunity Name. If you want more information about the Donor; click their name.

Donors:

The Donors tab is a list of all the donors who have given to the school, with their contact information. You can see more detail about the donor by clicking on their name. We have not given users the ability to edit contact information. If you see anything that needs to be updated, click on the Feed tab. Write us a post that lets us know what needs to be changed. Tag us inside that post by typing @laurel or @maryjo (then selecting our name).

Students:

The Students tab is a list of all of the students who have applied for the scholarship program in past and present years. Clicking on the student name will provide student contact information and allow you to see past and current award information. If you see anything that needs to be updated, click on the Feed tab. Write us a post that lets us know what needs to be changed. Tag us inside that post by typing @laurel or @maryjo (then selecting our name).

Awards:

The Awards tab is very similar to the roster spreadsheets that we used in the past. Some of the information in the awards tab will be pre-filled based on the application. An award is created when an application for the current year is submitted. If you don't see an award for a particular student, make sure that the on-line application has been submitted. You can enter information into this list view by clicking in the blanks. Once you have completed entries you will click Save. You

can sort by column headers and you can change the width of the columns by clicking in between the headers. You can also go into the detail of each award by clicking on the Award Name. You can enter and save things in that detailed place as well.

Understanding the use of the words "Award" and "Allocation" is key to this site. The Award registers your intention for each child. Allocation is like a "shopping cart" --- you allocate when you have funds available and are ready to spend them. You may decide to Allocate the entire amount of the Award or Allocate just a portion at a time. Our database is structured so that each student who applies for a scholarship has an "Award." The Award may be either approved or denied. If it is approved, the Award amount will be the total amount that you would like the student to receive for the school year.

AWARD= | ALLOCATION=
scholarship amount   part or all of award

Allocations:

Funds are allocated to a student when there are funds available and you are ready to request a check or ACH. Each Award may be allocated in one or several different disbursements throughout the year. For example, if Sally Student was awarded $1000 in scholarship funds, you may wish to allocate $500 in October and $500 in March. Each student who has an Award amount in the system will show up on the Allocations tab until their award has been completed. On the Allocations tab, you will be able to see the scholarship (award) amount, a column for the allocation amount, a place to enter the date, the amount remaining (the difference between what the Award amount is and what has already been allocated) and a check box called "Ready."

Disbursements:

The Disbursements tab shows you the past disbursements for your school. The prior years are summarized in one disbursement per year. For more current years, look in the Files section in the right-hand column to view the list of the students covered with that disbursement.

School Details:

Click on your school name in the list view. You will find current totals, cumulative totals for all program years, and details about your school. Please let us know if your school information needs to be updated.

Reports:

Please feel free to suggest additional report formats!

Awarding Scholarships

Setting the Award – (see video)

Students will enter the system through the online Application form. To find the link to your school's application form go to the School Detail tab. In the Links section you will find the link to the TFA Application; you can copy and paste from there.

The awards tab is where the school sets the scholarship amount, which is the amount they would like to award each student for the full year. If this amount is dependent on donations, please set a "goal" amount that you would like to be able to award each student. You can edit the information on this tab by clicking the little pencil next to the fields. Fill in the following fields:
1. Tuition Amount – enter the amount of tuition and fees
2. Select the Award Status – If you are ready to Approve, set it to Approved. If you select Denied then you must select a Denial Reason (click on the student award name and find this field in the record detail).
3. Enter the Scholarship Amount (this could be a goal or anticipated amount)
4. Choice Scholarship Student – check the box if the student is also receiving a Choice Scholarship in the current year and enter the amount in the next column.
5. Enter your initials. If you are processing your own child's award then you must have a different school official verify the award and enter their initials.

If you prefer, you can enter the same information by clicking the Student Award Name and going into the award detail record. This is also where you can upload income documentation.   Right under the heading for the Student Award you will see two tabs - one called Details and the other called Feed. Click Feed. Create a new Post by clicking Share. Then add @laurel or @maryjo so that we are notified of the newly attached document. Feel free to type us a nice note! Then attach the document using the little paperclip. Once we receive the notification, we will take a look at the documentation, redact any social security numbers and upload in the Files section of the Award.

If you are ready to request a disbursement for the total amount of the scholarship for every student on your award list, you can just push the "request a disbursement" button from the Awards tab, and we will take it from there. However, if you only want to request funding for some of the students or for part of the scholarship, please read the next section and proceed to the Allocations tab.

Allocating Funds – (see video)

The balance available to allocate is in the Dashboard on the Home page and on the Awards Tab. Keep in mind that the balance isn't adjusted until a disbursement or a donation is fully processed. All students with an Award that hasn't already been fully funded will appear on the Allocations tab. Enter the amount you would like to allocate into the list view by either double clicking the field or clicking the pencil. When you have an allocation ready to go, check the box called "Ready." Be sure to click Save after your entries. Once you click "Ready," the student will disappear from the Allocations tab after you save.
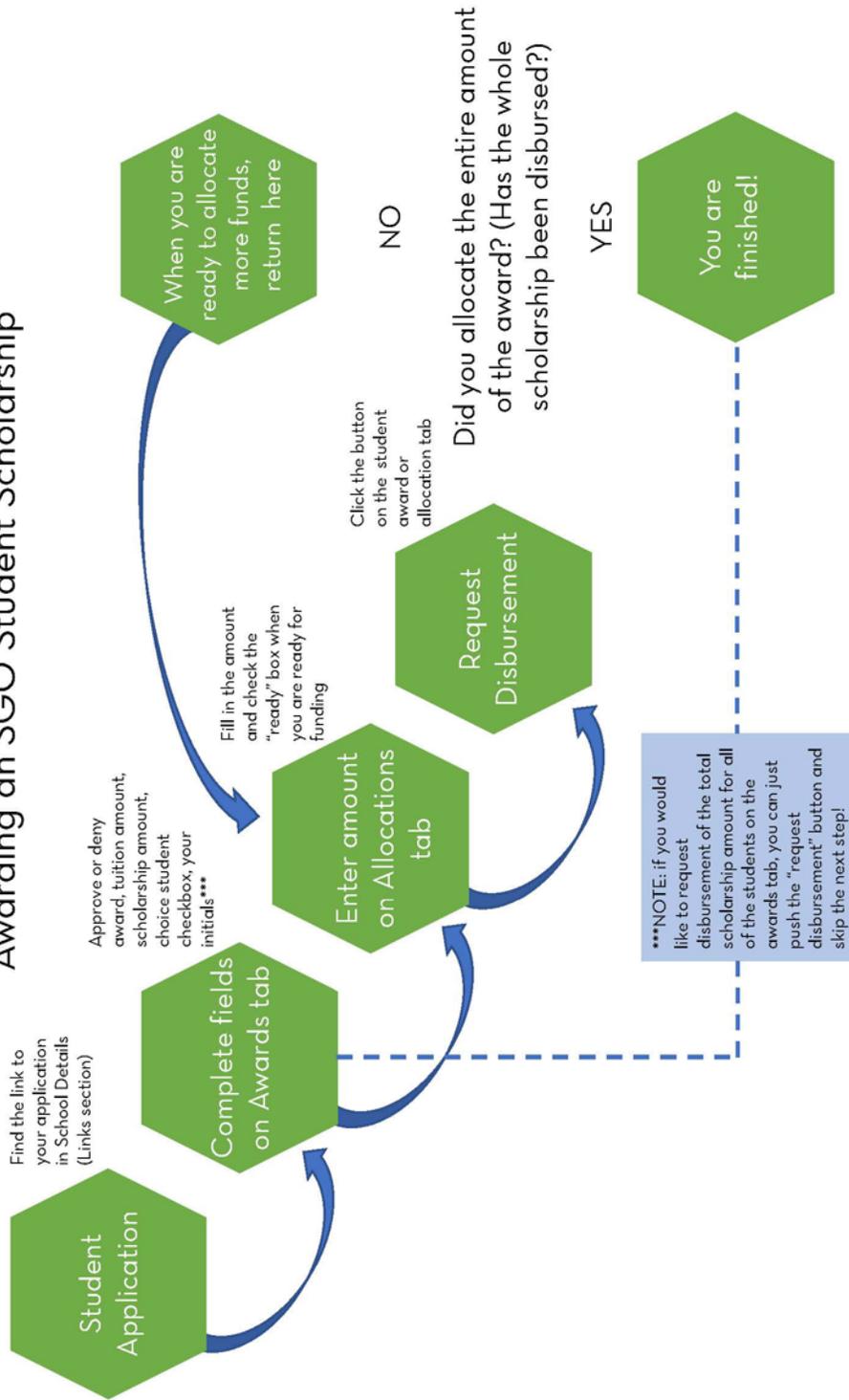
Requesting a Disbursement

Once awards have been set and allocations made, a disbursement can be requested.

There is a Request Disbursement button on the Awards tab and the Allocations tab; click either button to Request a Disbursement. This will send an email to SEC. We will verify each award and allocation and contact you with any questions. Our controller typically handles disbursements on Thursdays. If your school has opted to receive a check and the amount is substantial it takes two signatures, which means it might not get in the mail right away. If there is an urgent need for a disbursement, please contact us.

Resources:

We have a more comprehensive Awarding Scholarships Process Manual that can be accessed from the forms page on our website or on from the Home tab on the portal (click on the Student/Parent Forms and Materials tab below our logo). See below for a graphic summary of the award process.

Awarding an SGO Student Scholarship

Find the link to your application in School Details (Links section)

Student Application

Approve or deny award, tuition amount, scholarship amount, choice student checkbox, your initials***

Complete fields on Awards tab

Fill in the amount and check the "ready" box when you are ready for funding

Enter amount on Allocations tab

When you are ready to allocate more funds, return here

Click the button on the student award or allocation tab

Request Disbursement

Did you allocate the entire amount of the award? (Has the whole scholarship been disbursed?)

NO

YES

You are finished!

***NOTE: if you would like to request disbursement of the total scholarship amount for all of the students on the awards tab, you can just push the "request disbursement" button and skip the next step!