



Education Scholarship Account Provider Application Instructions

Provider Application Instructions

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Introduction

In this application, we collect provider information at 3 different levels.

1. First, we ask what kind of user you are and collect the contact information for the user logged into the application. This is called Provider Onboarding.
2. Next, we collect Business Profile information for the headquarters or corporate office of the business. This includes things that apply to the entire business, regardless of the number of locations. For example, a business license number and corporate office contact and the type of services the business provides.
3. Finally, we collect information for each Location where the office operates. Each location will be required to provide Billing Rates and an Employee List for that location since it is possible that rates and employees are different from one location to another. **The provider will be submitted and approved at the Location level.**

It is possible that a provider has only one location and it is both the corporate office and the only service provider location. To make it a bit more streamlined, a business Location will be created automatically when a new Business Profile is created. You will be taken directly to that Location to start uploading required documentation.







When all the required documents are uploaded, you will be required to sign and submit an agreement that will govern the relationship between the provider and the Scholarship Accounts Division. This agreement only needs to be signed once per year, regardless of how many locations are submitted throughout that 12-month period.

Provider Onboarding

After logging into the application from AccessIN, choose the type of user you are. In this example, choose **Business** and press or click **Next**.

Welcome, Smith!

To get started, tell us who you are.

 Parent	 Emancipated student
 Tutor	 Paraprofessional
 Business	 School

[Next →](#)

Confirm the contact details and optionally choose to allow the Scholarships Account Division to contact you by text. Click or press **Next**.

Welcome, Smith!

Please verify the information below is correct.

First name
Smith

Last name
BizSeven

Email
dlockert+b7@gmail.com

Phone
+14193878876

I authorize Scholarship Accounts Division to deliver text messages to the mobile telephone number(s) I provide and certify that I am the legal owner of the mobile device I registered. I understand that I will incur any charges that may result from receiving text messages. My consent or lack of consent will have no effect on my child's scholarship.

[← Previous](#) [Next →](#)

Enter your address and click or press Submit to create a Business user account.

Welcome, Smith!

Please provide your address.

Line1
3117 Wilde Lake Blvd

Line2
#79

City
Pensacola

FL Zipcode
32526

[← Previous](#) [Submit →](#)

At this point, Provider Onboarding is complete, and we move on to gathering the Business Profile information for the business.

Create New Business Profile

In this section, we collect the information related to the business in general. Business License and services provided, for example. Enter the requested information for your headquarters or primary location.

New Corporate Provider

Business Organization

Legal Business Name

BizSeven

Business License Number

565468951321

Tax ID / EIN

76-5670983

Primary Address

Line1

3117 Wilde Lake Blvd

Line2

City

Pensacola

State

FL

Zipcode

32526

Business Services

Please select the service(s) your business provides to students with disabilities.

Instructions

Entity shall only accept INESA payments for qualified expenses.

All services must be **in person** unless indicated by "Virtual" which allows the service to be in person or virtual.

Choose the type of services your business can provide to qualified students.

Indiana Scholarship Account

Business Profile

Business Services

Please select the service(s) your business provides to students with disabilities.

Instructions
Entity shall only accept INESA payments for qualified expenses.
All services must be **in person** unless indicated by "Virtual" which allows the service to be in person or virtual.

<input type="radio"/> Tuition and fees	<input type="radio"/> Individual class
<input type="radio"/> Testing and examination services	<input type="radio"/> Medical therapies
<input type="radio"/> Occupational therapy - In Person	<input type="radio"/> Occupational therapy - Virtual
<input type="radio"/> Educational services e.g., Tutoring	<input type="radio"/> Paraprofessional/Educational aides services
<input checked="" type="checkbox"/> Services for extracurricular activities and/or programs	<input checked="" type="checkbox"/> Services for additional programs, resources, or staffing defined in the student's education plan
<input checked="" type="checkbox"/> Instruction on reading, writing, math, and other education related activities	<input checked="" type="checkbox"/> Extracurricular programs
<input checked="" type="checkbox"/> Training program/camp - In Person	<input type="radio"/> Training program/camp - Virtual
<input checked="" type="checkbox"/> Transportation service(s)	

Does your entity offer additional virtual services that are not INESA approved?

Marketing Information

The Marketing information will be displayed in Provider searches. Please enter the information you would like publicly displayed. Click or press Create Corporate provider to create the Business Profile for this business.

Services for additional programs, resources, or staffing defined in the student's education plan

Does your entity offer additional virtual services that are not INESA approved?

Marketing Information

Display name
BizSeven Services

Website
www.thisisnotabizsite.com

Business description
This is the description of my business.]

Create Corporate provider

The Business Profile is complete.

Next, we move on to locations. You may only have one and that is fine. Providers are submitted and approved at the Location level so it is important to get one created and get the necessary documentation uploaded so you can submit your business for approval.

Submit a location for approval

Clicking Create Corporate provider in the previous step creates the Business Profile for the business.

In addition, a Location will be created from the same business profile information. You will be taken straight to the Location screen where the information box at the top details what documents are required prior to submitting the provider business for approval.

The screenshot displays the 'Indiana Scholarship Account' interface. On the left is a dark blue sidebar with navigation options: Business Profile, Locations (highlighted with a red box), Documents, Scholarship Opportunities, and Program Calendar. The main content area features a top navigation bar with a warning message: 'The following documents are required before submitting location for review:' followed by a bulleted list: Business License, Billing Rates, and Employee List. Below this is a 'Back to All Locations' link and a 'Submit For Review' button. The central section is titled 'BizSeven Services' with a 'Draft' status. It contains two panels: 'Location Contact Information' with fields for Name, Address, City, State, ZIP, and Contact details; and 'Documents' with an 'Upload' button and a 'View All Documents' link. A 'Delete Location' button is located at the bottom.

Indiana Scholarship Account

Business Profile

Locations

Documents

Scholarship Opportunities

Program Calendar

Warning: The following documents are required before submitting location for review:

- Business License
- Billing Rates
- Employee List

← Back to All Locations

Created On: 03/24/2024, 5:33 pm
Last Modified: 03/24/2024, 5:33 pm

BizSeven Services

Draft

Location Contact Information [Edit]

Location Name: BizSeven Services
Street Address: 3117 Wilde Lake Blvd
Apt / Suite / Unit: -
City: Pensacola
State: FL
ZIP: 32526
Contact Name: Smith BizSeven
Email: dlockert+b7@gmail.com
Phone: +14193878876

Documents [Upload]

[View All Documents →](#)

[Delete Location]

Note: The **Submit for Review** button will be disabled until all Location and Business Profile level required documents have been uploaded.

Upload Location Documentation

To upload the required documentation, click or press the Upload button in the Documents section of the page.

⚠ The following documents are required before submitting location for review:

- Business License
- Billing Rates
- Employee List

[← Back to All Locations](#) Created On: 03/24/2024, 6:14 pm
Last Modified: 03/24/2024, 6:14 pm

Smith Business Seven

Draft [Submit For Review](#)

Location Contact Information

[Edit](#)

Location Name: Smith Business Seven

Street Address: 3117 Wilde Lake Blvd

Apt / Suite / Unit: -

City: Pensacola

State: FL

Documents

[View All Documents →](#)

[Upload](#)

Documents uploaded here will apply to this location specifically.

Upload New Document

for Smith Business Seven

i Document(s) uploaded here will only be applied to this location only. To upload a document that applies to more than one location, go to the [Document Manager](#).

Document Type

Billing Rates

Employee List

File*

Drag & drop to upload or [select file](#)
(Max file size: 40MB)

No file chosen

[Cancel](#) [Upload](#)

Click or press the button next to the type of document you wish to upload.

Upload New Document

for Smith Business Seven

Document(s) uploaded here will only be applied to this location only. To upload a document that applies to more than one location, go to the [Document Manager](#).

Document Type

- Billing Rates
- Employee List

File*

Drag & drop to upload or [select file](#)
(Max file size: 40MB)

No file chosen

Drag and drop a file into the File box or click **Select File** to browse to the file the appropriate document.

Upload New Document

for Smith Business Seven

Document(s) uploaded here will only be applied to this location only. To upload a document that applies to more than one location, go to the [Document Manager](#).

Document Type

- Billing Rates
- Employee List

File*

Drag & drop to upload or [select file](#)
(Max file size: 40MB)

No file chosen

Click or press the **Upload** button to upload the first document.

Upload New Document ✕

for Smith Business Seven

i Document(s) uploaded here will only be applied to this location only. To upload a document that applies to more than one location, go to the [Document Manager](#).

Document Type

Billing Rates

Employee List

File*

Drag & drop to upload or [select file](#)
(Max file size: 40MB)

EmployeeList.jpg

Note: in the example above, the documents uploaded for Billing Rates and Employee List were accidentally reversed.

When the first document is uploaded, the Location screen will be updated to show the uploaded document as well as what documents are still outstanding.

Indiana Scholarship Account

Business Profile

Locations

Documents

Scholarship Opportunities

Program Calendar

Smith Business Seven

Warning: The following documents are required before submitting location for review:

- Business License
- Employee List

[Back to All Locations](#) Created On: 03/24/2024, 6:14 pm
Last Modified: 03/24/2024, 6:14 pm

Smith Business Seven

Location Contact Information

Location Name: Smith Business Seven

Street Address: 3117 Wilde Lake Blvd

Apt / Suite / Unit: -

City: Pensacola

State: FL

ZIP: 32526

Contact Name: Smith BizSeven

Email: dlockert+biz7@gmail.com

Phone: +14193454878

Documents

Billing Rates

[EmployeeList.jpg](#)

Submitted: 03/24/2024

Expires: -


Location: Smith Business Seven

[View All Documents](#) →

Repeat this process to upload the Employee List for this Location.

The Location screen will show both documents that have been uploaded for the location and the information box will remind you the Business License still needs to be uploaded. This is a Business Profile level document, so we'll go to a different screen to finish submitting that document.

Click or press **View All Documents** to go to Document Manager and upload the Business License documentation.

 The following documents are required before submitting location for review:

- Business License

[← Back to All Locations](#) Created On: 03/24/2024, 6:14 pm
Last Modified: 03/24/2024, 6:14 pm

Smith Business Seven

[Submit For Review](#)

Draft

Location Contact Information

[Edit](#)

Location Name: Smith Business Seven

Street Address: 3117 Wilde Lake Blvd

Apt / Suite / Unit: -

City: Pensacola

State: FL

ZIP: 32526

Contact Name: Smith BizSeven

Email: dlockert+biz7@gmail.com

Phone: [+14193454878](tel:+14193454878)

Documents

[Upload](#)

Employee List [Pending](#)

[Billing Rate.jpg](#)
Submitted: 03/24/2024
Expires: -
Location: Smith Business Seven

Billing Rates [Pending](#)

[EmployeeList.jpg](#)
Submitted: 03/24/2024
Expires: -
Location: Smith Business Seven

[View All Documents →](#)

Upload Business License documentation

In the Document Manager screen, click or press **+ New Document** to upload another document, in this case, the Business License proof.



Indiana Scholarship Account

[Business Profile](#)

[Documents](#)

[Scholarship Opportunities](#)

Document Manager

[+ New Document](#)

Displaying 2 Items

Document Name	Location	Submitted	Expires	Status	Document Type
Billing Rate.jpg	Smith Business Seven	03/24/2024	-	Pending	Employee List
EmployeeList.jpg	Smith Business Seven	03/24/2024	-	Pending	Billing Rates

Click or press the button next to Business License and use the File box to upload Business License documentation in the same way as the previous documents were uploaded. Fill in the date when the documentation expires. Click Upload to finish the upload process.

Upload New Document ✕

i Business License will automatically be applied to all locations when uploaded. Each location is required to have Billing Rates and an Employee List provided. If a location has billing rates and/or an employee list that is unique to it, be sure to select the location before uploading the document, otherwise that document will be applied to all locations.


Document Type

Business License

Billing Rates

Employee List

File*



Drag & drop to upload or [select file](#)
(Max file size: 40MB)

Business License.jpg

Expires at
01/01/2025 📅

⌫ Cancel
📤 Upload

All uploaded documents will display in Pending status and the Location column indicates if the document applies to the business as a whole or a Location.

Document Manager + New Document

Displaying 3 items

Document Name	Location	Submitted	Expires	Status	Document Type
Business License.jpg	All	03/24/2024	01/01/2025	Pending	Business License
Billing Rate.jpg	Smith Business Seven	03/24/2024	-	Pending	Employee List
EmployeeList.jpg	Smith Business Seven	03/24/2024	-	Pending	Billing Rates

Sign the Agreement and Submit the Location for Approval

Press or click Location in the left navigation to return to the location screen. Once all required documents have been uploaded, the **Submit for Review** button will be enabled. Press or click the button to move on to sign the agreement and submit the Location for approval.

SEAL OF THE STATE OF INDIANA
1816

Indiana Scholarship Account

Business Profile

Locations

Documents

Scholarship Opportunities

Program Calendar

← Back to All Locations

Created On: 03/24/2024, 6:14 pm
Last Modified: 03/24/2024, 6:14 pm

Submit For Review

Smith Business Seven

Draft

Location Contact Information [Edit]

Location Name: Smith Business Seven
Street Address: 3117 Wilde Lake Blvd
Apt / Suite / Unit: -
City: Pensacola
State: FL
ZIP: 32526
Contact Name: Smith BizSeven
Email: dlockert+biz7@gmail.com
Phone: [+14193454878](tel:+14193454878)

Documents [Upload]

Employee List [Pending]
[Billing Rate.jpg](#)
Submitted: 03/24/2024
Expires: -
Location: Smith Business Seven

Billing Rates [Pending]
[EmployeeList.jpg](#)
Submitted: 03/24/2024
Expires: -
Location: Smith Business Seven

[View All Documents](#) →

Click the link to the INESA Entity Agreement to open it for review. Check the boxes and type your name to “sign” the agreement. Click or press **Sign & Submit for Review** to complete the application process for this location.

Agreement

In accordance with the statutory and regulatory guidance of the Indiana Education Scholarship Account I affirm that:

- I have read, understand, and agree to the [INESA Entity Agreement](#) for the relevant scholarship program I am applying to.
- Entity shall provide a receipt to an ESA Parent/EES for each qualified expense charged for education or related services provided to the eligible student.
- Payments will be made after services are provided.
- Entity may not charge an ESA Student an amount greater than a similarly situated student who is receiving the same or similar services.
- Refunds must be made to the Treasurer of State, who will redirect monies to the ESA student account.
- Agreement is valid for one (1) school year. Subsequential years documentation will require a renewal process.

Application Submission and Certification

By signing and submitting this application, the undersigned hereby acknowledges the information provided on this application is true and accurate to the best of his/her knowledge. You should be aware that when you sign and submit this application, the information you share may be disclosed with the Indiana Department of Education, business partners of the Treasurer of State, and parents of eligible students of the ESA program. The Treasurer of State may collect information about you from other sources to verify information submitted in the application.

By providing your name below, you understand that the signing and submitting of this application in this fashion is the legal equivalent of having placed your handwritten signature on the submitted application and this affirmation.

Acknowledgment

I acknowledge and agree with the above statement about my application.

Please type your name below to confirm your acknowledgment.

Full Name: Date:

Sign & Submit For Review

A banner will appear at the top of the page to confirm the Location has been submitted for approval and an email will be sent to confirm as well.

✓ Location successfully submitted for review.

[← Back to All Locations](#) Created On: 03/24/2024, 6:14 pm
Last Modified: 03/24/2024, 6:46 pm

Smith Business Seven

Pending

Location Contact Information Edit

Location Name:	Smith Business Seven
Street Address:	3117 Wilde Lake Blvd
Apt / Suite / Unit:	-
City:	Pensacola
State:	FL
ZIP:	32526
Contact Name:	Smith BizSeven
Email:	dlockert+biz7@gmail.com
Phone:	+14193454878

Documents Upload

Employee List Pending

[Billing Rate.jpg](#)
Submitted: 03/24/2024
Expires: -
Location: Smith Business Seven

Billing Rates Pending

[EmployeeList.jpg](#)
Submitted: 03/24/2024
Expires: -
Location: Smith Business Seven

[View All Documents →](#)

This is the end of the process if you have only one location.

Adding Additional Locations

If your business has more than one service location, you will need to create a Location for each additional site.

Choose **Locations** in the left navigation and click or press **+ New Location**.

SEAL OF THE STATE OF INDIANA 1816

Indiana Scholarship Account

- Business Profile
- Locations**
- Documents
- Scholarship Opportunities
- Program Calendar

1 location has not yet been submitted for review. To submit a location, navigate to the location, verify all documentation has been provided, and click submit.

Locations

Add at least one (1) service location.
Each location must include an employee list for all members who will serve students. This lists needs to include:

1. Employee legal name
2. Employee Certification and/or Professional License Number(s)
3. Employee National Provider Identifier (NPI) number (if applicable)

Note: If you have more than one location, they may be added if the locations are under the same business license as the primary location.

Status: All

Displaying 1 item

Business Location	Status	Date Created
Smith Business Seven	Draft	03/24/2024

The process is very similar to the previous process except the contact section and file upload are on the same screen. Upload documents one at a time to save them properly. When complete, click or press **Save Location**.

SEAL OF THE STATE OF INDIANA 1816

Indiana Scholarship Account

- Business Profile
- Locations**
- Documents
- Scholarship Opportunities
- Program Calendar

Add Business Location

Name: Smith BizSeven Location 2

Line1: 111 Memorial Parkway

Line2:

City: Fort Walton Beach

FL: FL Zipcode: 32547-2902

Contact name: Smith BizSeven

Contact email: Location2@bizseven.com

Contact phone: 4193339874

Document(s) uploaded here will only be applied to this location only. If the billing rates and/or employee list for this location is the same as other locations, navigate to the [Document Manager](#) to upload documents that apply to all locations.

Billing Rates

Drag & drop to upload or [select file](#) (Max file size: 40MB)

Billing Rate.jpg

Employee List

Drag & drop to upload or [select file](#) (Max file size: 40MB)

EmployeeList.jpg

Cancel Save Location

When the documents are uploaded the information banner will remind you if there are any locations that have not been submitted for approval. Click or press the link to the Draft status location to finish the submission process.

! 1 location has not yet been submitted for review. To submit a location, navigate to the location, verify all documentation has been provided, and click submit.

Locations

[+ New Location](#)

Add at least one (1) service location.
Each location must include an employee list for all members who will serve students. This lists needs to include:


1. Employee legal name
2. Employee Certification and/or Professional License Number(s)
3. Employee National Provider Identifier (NPI) number (if applicable)

Note: If you have more than one location, they may be added if the locations are under the same business license as the primary location.

Status: All Displaying 2 items

Business Location	Status	Date Created
Smith BizSeven Location 2	Draft	03/24/2024
Smith Business Seven	Pending	03/24/2024

Click or press **Submit for Review**.



Indiana Scholarship Account

- Business Profile
- Locations**
- Documents
- Scholarship Opportunities
- Program Calendar

[← Back to All Locations](#)

Created On: 03/24/2024, 6:45 pm
Last Modified: 03/24/2024, 6:45 pm

Smith BizSeven Location 2

Draft

[Submit For Review](#)

Location Contact Information

[Edit](#)

Location Name: Smith BizSeven Location 2

Street Address: 111 Memorial Parkway

Apt / Suite / Unit: -

City: Fort Walton Beach

State: FL

ZIP: 32547-2902

Contact Name: Smith BizSeven

Email: Location2@bizseven.com

Phone: 4193339874

Documents

[Upload](#)

Employee List Pending

[EmployeeList.jpg](#)

Submitted: 03/24/2024

Expires: -

Location: Smith BizSeven Location 2

Billing Rates Pending

[Billing Rate.jpg](#)

Submitted: 03/24/2024

Expires: -

Location: Smith BizSeven Location 2

[View All Documents →](#)

It will not be necessary to submit another agreement if it is within a year of the last signed agreement.

Agreement

An agreement to do business with INESA must be signed once per year. The most recent agreement is dated 03/24/2024 and is located [here](#). New locations can be submitted without an additional signature until 03/24/2025.

[Submit For Review](#)

The green banner at the top of the page will confirm the location has been submitted.

The screenshot shows the 'Indiana Scholarship Account' interface. A green banner at the top indicates 'Location successfully submitted for review.' Below this, there is a 'Back to All Locations' link and a timestamp: 'Created On: 03/24/2024, 6:45 pm' and 'Last Modified: 03/24/2024, 6:49 pm'. The main heading is 'Smith BizSeven Location 2' with a 'Pending' status tag. There are two main sections: 'Location Contact Information' and 'Documents'. The 'Location Contact Information' section includes fields for Location Name, Street Address, Apt / Suite / Unit, City, State, ZIP, Contact Name, Email, and Phone. The 'Documents' section includes 'Employee List' and 'Billing Rates', both with 'Pending' status tags and 'Upload' buttons. A 'View All Documents' link is also present.

Submission Complete

The Locations screen will show all locations are Pending status, which means they have been submitted and are waiting for review.

The screenshot shows the 'Locations' screen in the 'Indiana Scholarship Account' interface. A '+ New Location' button is in the top right. Below the heading, there is a note: 'Add at least one (1) service location. Each location must include an employee list for all members who will serve students. This lists needs to include: 1. Employee legal name 2. Employee Certification and/or Professional License Number(s) 3. Employee National Provider Identifier (NPI) number (if applicable)'. A note below states: 'Note: If you have more than one location, they may be added if the locations are under the same business license as the primary location.' There is a 'Status' dropdown menu set to 'All' and a 'Displaying 2 items' indicator. A table below shows the list of locations:

Business Location	Status	Date Created
Smith BizSeven Location 2	Pending	03/24/2024
Smith Business Seven	Pending	03/24/2024

Business Profile will show the Business License is pending review.

Business Profile Edit

To apply as a provider, create and submit at least one business location including the required documentation.

Business Organization

Legal Business Name: SmithBizSeven
 Business License Number: 565468951321
 Tax ID / EIN: 82347322873

Business Address

Street Address: 3117 Wilde Lake Blvd
 Apt/Suite/Unit: -
 City: Pensacola
 State: FL
 ZIP: 32526

Marketing Information

Display Business Name: Smith Business Seven
 Website: <http://www.thisisnotabizsite.com>
 Business Description: Description of the business and services

Business License Upload

[Business License.jpg](#) Pending
 Submitted: 03/24/2024
 Expires: 01/01/2025

Agreement

[agreement.pdf](#)
 Signed: 03/24/2024
 Expires: 03/24/2025

Business Services

Services for extracurricular activities and/or programs
 Services for additional programs, resources, or staffing defined in the student's education plan
 Instruction on reading, writing, math, and other education related activities
 Extracurricular programs
 Training program/camp - In Person
 Transportation service(s)
 Additional non-INESA approved virtual services

The Document Manager will show all documents in Pending status, waiting for review.

Document Manager + New Document

Displaying 5 items

Document Name	Location	Submitted	Expires	Status	Document Type
EmployeeList.jpg	Smith BizSeven Location 2	03/24/2024	-	Pending	Employee List
Billing_Rate.jpg	Smith BizSeven Location 2	03/24/2024	-	Pending	Billing Rates
Business License.jpg	All	03/24/2024	01/01/2025	Pending	Business License
Billing_Rate.jpg	Smith Business Seven	03/24/2024	-	Pending	Employee List
EmployeeList.jpg	Smith Business Seven	03/24/2024	-	Pending	Billing Rates

Scholarship Accounts Division Office of the Treasurer of State

Indiana Education Scholarship Account

ESA@tos.in.gov

317-232-0723

Career Scholarship Account

CSA@tos.in.gov

317-232-0723

<https://www.in.gov/tos/scholarship/>

