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**.

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.

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.

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.

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.

Documents uploaded here will apply to this location specifically.

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

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

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

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.

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.

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.

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

Upload New Document ✕

ⓘ 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.

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.

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.

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.**

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.**

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.

Click or press **Submit for Review.**

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

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

Submission Complete

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

Business Profile will show the Business License is pending review.

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

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/