PARTNER SCHOOL ONBOARDING GUIDE • $0 COST TO SCHOOLS

Onboarding that feels *effortless* from day one.

Here is the complete walkthrough of how your school joins SparkScholar—what we ask from you, how fast your standardized portal goes live, what your back-end admin app looks like, and what families and donors experience.

STEP 01 • WHAT WE ASK FROM YOU

Four simple details. About ten minutes total.

You do not need legal counsel, custom software work, or accounting staff to launch. To provision your school's dedicated sub-ledger and portal, we collect just four items:

01

School Legal Name, EIN & Accreditation

Your school's official legal name, 9-digit federal Employer Identification Number (EIN), campus city/ZIP code, and accrediting body (such as TEPSAC, Cognia, ISAS, or AdvancED).

`Example: Kingswood Academy • EIN 74-5550199 • Austin, TX 78731`

02

School Crest & 1-Click MOU

Confirm your pre-loaded school crest (or monogram) and accept our standardized $0 Partner School MOU directly inside **admin.sparkscholar.org**—with zero mission blurbs or custom copywriting required.

`Name + Crest only • Displayed on sparkscholar.org/schools/your-school`

03

Authorized Admin Portal Users

The names, roles, and work email addresses of the 1 to 3 leaders authorized to access your school's private back-end at **admin.sparkscholar.org** (typically Head of School, Admissions/Scholarship Lead, and Bursar).

`Passwordless magic-link sign-in for authorized staff only`

04

Bursar Contact & Bank-Hosted W-9 / ACH

Share your Bursar's work email during setup; Column N.A. / Mercury emails a direct bank-hosted link for your Form W-9 and $0-fee ACH payouts—so we never store your banking numbers.

`Mercury Segregated Treasury ••9166 → School Operating Account`

STEP 02 • TURNKEY LAUNCH TIMELINE

Live in minutes—standardized by design.

Both your public Donor & Applicant Portal and your private Admin Portal run on one clean, pre-audited standard template.

DAY 1 • ~2 MINUTES

Confirm Your Pre-Loaded Profile

Open your personalized onboarding link, confirm your school crest and admin emails, and accept the $0 Partner MOU.

INSTANT

Portal & Sub-Ledger Live

Your segregated 93.5% school sub-ledger (••9166), public donor link, and **admin.sparkscholar.org** workspace activate immediately.

BEFORE FIRST PAYOUT

Bank-Hosted Bursar Link

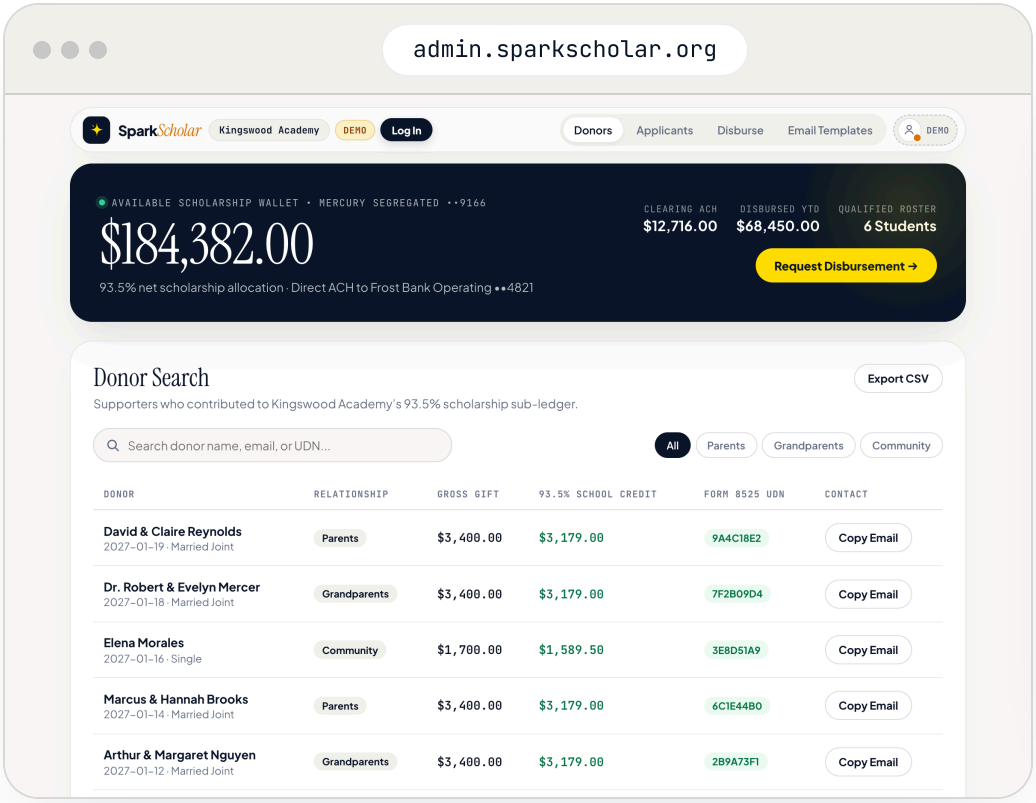
Your Bursar completes Mercury's encrypted W-9 and operating account invite so $0-fee tuition payouts settle directly to your school.

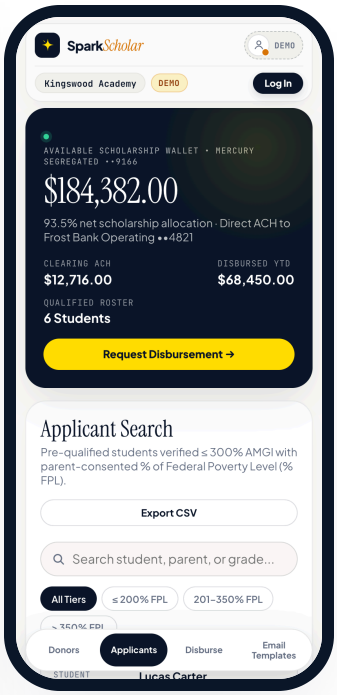
Why there are zero custom design rounds: To keep your setup cost at $0 and ensure 100% IRS Section 25F statutory compliance across every partner campus, neither the Donor Portal nor the Admin Portal offers custom layout modifications. Your school's name and crest drop cleanly into our proven template—so you go straight to raising scholarship dollars instead of writing copy or reviewing mockups.

STEP 03 • YOUR BACK-END WORKSPACE

Meet admin.sparkscholar.org

A calm, minimal, mobile-friendly workspace built around one question: *how much is in our scholarship wallet, and how do we put it to work for our students?*





1. Donor Search

Instant search across every parent, grandparent, and community donor supporting your school's sub-ledger, with 1-click email copy and CSV export.

2. Applicant Search

See every pre-qualified student ranked by verified **% of Federal Poverty Level (% FPL)** and **% of County AMGI** so your aid committee can prioritize need.

3. On-Demand Disbursement

Request $0-fee Same-Day or Next-Day ACH payouts straight from your 93.5% wallet to cover tuition, textbooks, lab fees, and required uniforms.

4. Email Templates

Links straight out to fresh, copy-ready HTML and plain-text fundraising templates in the **Partner School Onboarding Kit**.

STEP 04 • FAMILY & APPLICANT JOURNEY

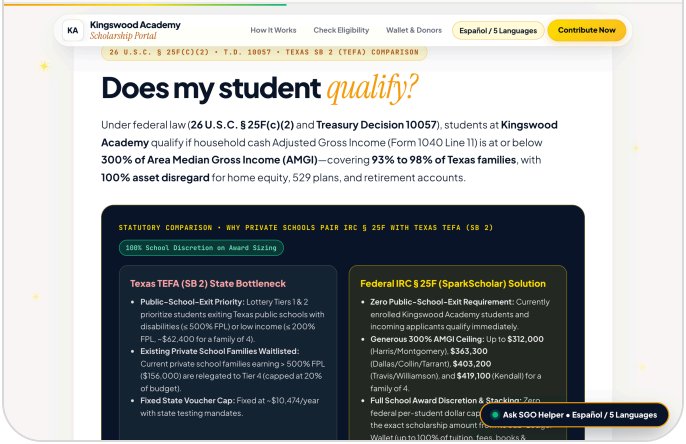
What parents see when pre-qualifying

Swipe through the four-step parent experience—from a 10-second Texas ZIP check to SSN-redacted verification.

SCREEN 1 OF 4 • INSTANT COUNTY LOOKUP

5-Digit Texas ZIP & Household Size Check

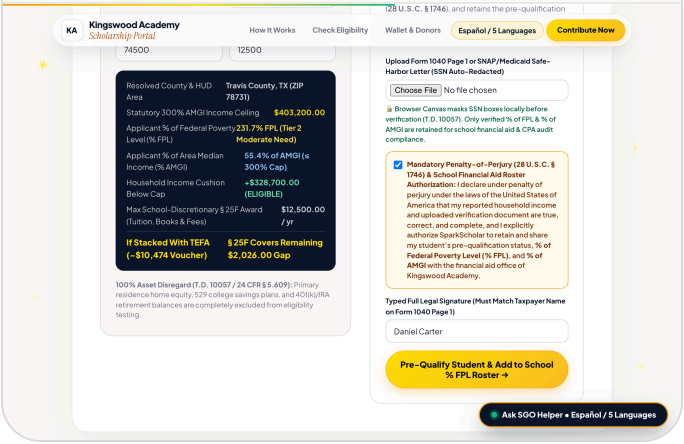
Parents enter their ZIP code and household size to see their exact 300% AMGI ceiling (covering 96.5% of Texas tax filers, with home equity and retirement accounts disregarded).



SCREEN 2 OF 4 • PRIVACY-FIRST UPLOAD

Browser SSN Redaction & Roster Sharing Consent

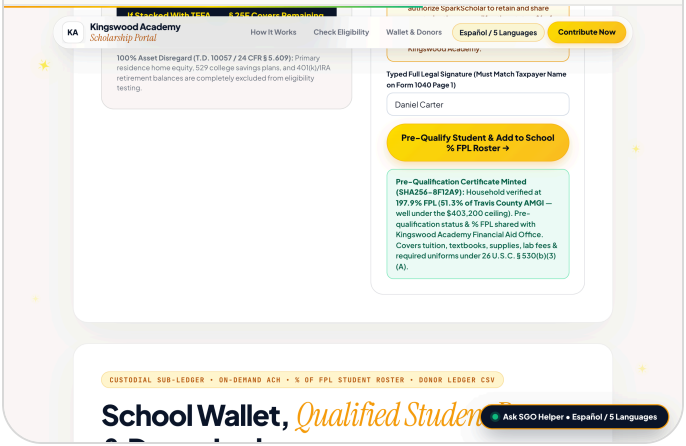
Social Security Numbers are masked in the parent's browser before upload, and parents authorize sharing their verified % of Poverty Line (% FPL) with your financial aid office.



SCREEN 3 OF 4 • VERIFIED PRE-QUALIFICATION

Instant Pre-Qualification Certificate & Expense Coverage

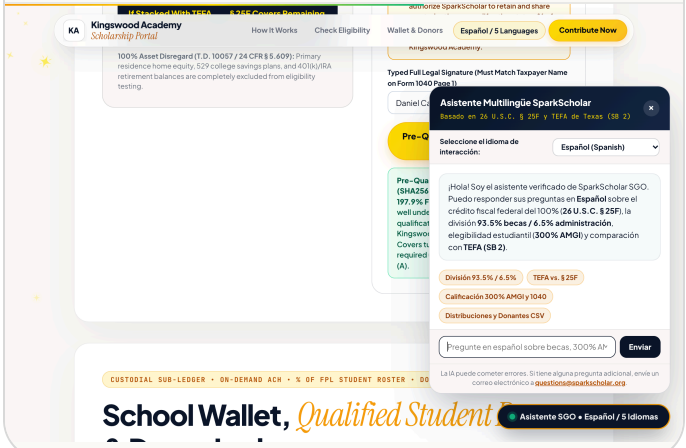
Once verified, the student appears immediately in your Admin Portal roster—eligible for tuition, textbooks, curriculum supplies, academic fees, and required uniforms.



SCREEN 4 OF 4 • 24/7 MULTILINGUAL PARENT SUPPORT

Built-In AI Chatbot in Any Language

Parents can ask questions 24/7 in English, Spanish, Vietnamese, Mandarin, Tagalog, or any language—keeping routine tax and eligibility questions off your front office desk.



STEP 05 • DONOR & COMMUNITY SUPPORTER JOURNEY

What donors see when redirecting their taxes

Swipe through how parents, grandparents, and community friends turn federal taxes they already owe into scholarships at your school.

SCREEN 1 OF 4 • SCHOOL LANDING PAGE

Your Dedicated School Scholarship Page

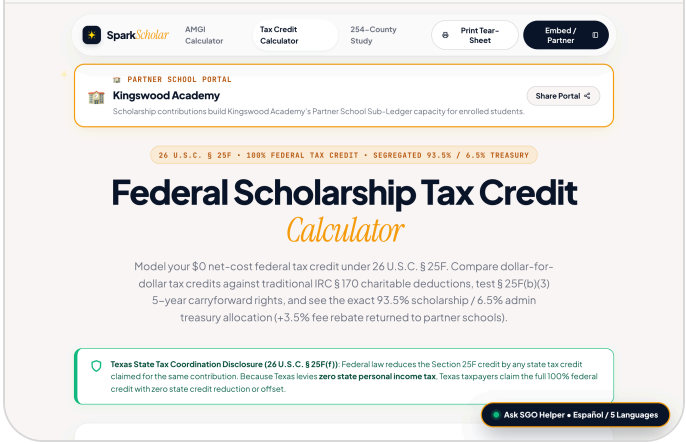
Supporters arrive on a calm, clear page featuring your school's name and crest alongside the $1,700 single / $3,400 married dollar-for-dollar federal tax credit rules.



SCREEN 2 OF 4 • TAX CREDIT MATH

Interactive $0-Net-Cost Tax Credit Calculator

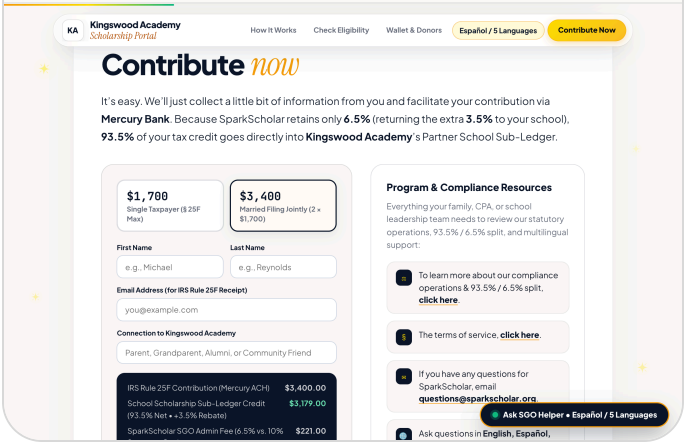
Donors and their CPAs compare a 100% dollar-for-dollar IRC § 25F credit against a standard charitable deduction—and see how unused credits carry forward up to 5 years.



SCREEN 3 OF 4 • TRANSPARENT SPLIT

93.5% Net School Credit & Zero-SSN Checkout

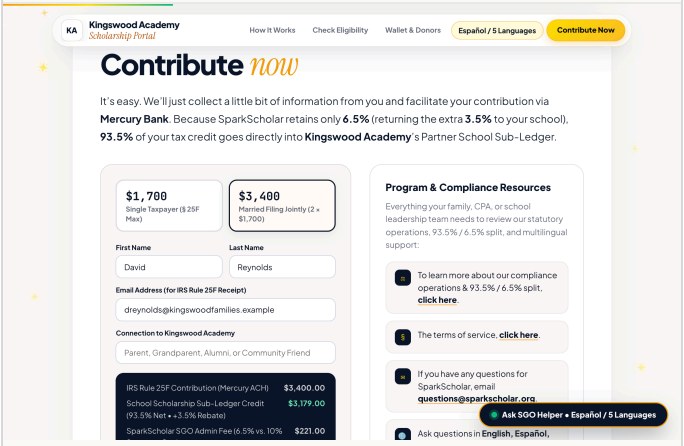
Donors see exact penny-for-penny transparency ($3,179 to your school's scholarship pool on a $3,400 gift) and complete their gift via Mercury Bank ACH without ever sharing an SSN.



SCREEN 4 OF 4 • INSTANT TAX DOCUMENTATION

Automatic IRS Form 8525 & Unique Donor Number

Upon settlement in our segregated ••9166 account, SparkScholar issues the official IRS Form 8525 certificate to the donor (and their CPA) and updates your live Admin Wallet.



24/7 FAMILY & DONOR SUPPORT

Parents get instant answers at 10 PM—in any language.

Every partner school portal includes our grounded AI chatbot trained directly on the federal IRC § 25F rules, 300% AMGI county tables, and covered K-12 expenses. Families can ask questions day or night in the language they speak at home, without adding a single phone call to your admissions office.

- English
- Español
- العربية (Arabic)
- Tiếng Việt
- 中文 (Mandarin)
- Tagalog
- Urdu & Hindi
- + Any Language 24/7

LOOKING AHEAD

What we see happening

Over the coming years, we expect the federal Scholarship Granting Organization ecosystem to grow into one of the most durable pillars of K-12 education funding in the country—and a genuinely wonderful way to sustain long-term support for America's kids.

Unlike state voucher debates such as Texas Education Freedom Accounts (TEFA), which compete inside biennial state legislative budgets, carry strict public-school-exit waitlists, and often become politically contentious, federal Section 25F scholarships are non-controversial and purely additive. Taxpayers simply choose to keep up to $1,700 or $3,400 of federal tax dollars they already owe working inside local school communities.

There is also far greater flexibility for schools and families: broad middle-class household eligibility up to 300% of Area Median Gross Income, coverage for tuition alongside textbooks, supplies, and required uniforms, multi-year sub-ledger continuity, and complete independence over your school's curriculum, admissions, and mission. It is simply bringing new resources to schools and the children they serve.

Reach out to us

Ready to get your school's portal started, or have a question for our team? Write to us anytime.

questions@sparkscholar.org