

# Utah Fits All Scholarship Program

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Qualifying Provider ClassWallet Guide



CLASSWALLET

**UTAH FITS ALL**

UFASCHOLARSHIP.COM

# Agenda

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- [ClassWallet Registration Process](#)
- [Linking Your Bank Account](#)
- [Receiving Payments](#)
- [Other Important Information](#)

# ClassWallet Registration Process

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# ClassWallet Registration

Once you are identified as a qualified provider for the UFAS program, you will receive an email with a link to the ClassWallet website. **Your registration will NOT be deemed complete until you create your ClassWallet account and verify your bank account.**

Click on the **“CREATE AN ACCOUNT”** button to get started.

The first step is a short online enrollment to create your account and the second step will be to link your bank account once your account is set up.

Please be sure to have your bank account and routing number and a W-9 form that will be provided online.

A screenshot of the ClassWallet registration form. The form is white with a light blue header containing the ClassWallet logo and the text "CLASSWALLET". Below the header, there are two input fields: "Email" with the placeholder text "Enter Email..." and "Password" with the placeholder text "Enter Password...". To the right of the password field, there is a red-bordered button labeled "Create Account". Below the password field, there is a link "Forgot Password?" and a link "Contact Support". Below the "Contact Support" link, there is a checkbox labeled "Remember Me". At the bottom of the form, there is a reCAPTCHA widget with the text "I'm not a robot" and a reCAPTCHA logo. Below the reCAPTCHA widget, there is a blue button labeled "LOGIN".

# ClassWallet Registration: Enrollment

When you click the “Create Account” button you will be directed to a quick 5 step sign-up wizard:

1. Provide information about your company. Please ensure the information entered here is exactly as entered on your Qualifying Provider application. Your ClassWallet registration will not be deemed complete if the information does not match your application.
2. Accept the terms and conditions.
3. Set up your account. Provide your name and **family point of contact email** and set up your password and security question.
4. Review and submit your information. If anything requires a correction, simply click the edit button.
5. Once complete, click “Accept” to log in to your account and finish the enrollment process.

This screenshot shows the first step of the registration wizard, 'Tell us about your company'. It features a progress bar at the top with four steps: 1. Company Details (active), 2. Legal Terms, 3. Security, and 4. Review & Submit. The form includes input fields for 'Company name', 'Company Website URL', 'Business Street Address', 'City', 'State', and 'ZIP Code'. A blue 'CONTINUE' button is located at the bottom right.

This screenshot shows the second step, 'Accept our legal terms and conditions'. The progress bar indicates step 2 is active. A scrollable text box contains the 'TERMS OF SERVICE'. At the bottom, there is a checkbox labeled 'I have read and accept terms and conditions'.

This screenshot shows the third step, 'Enter your login information'. The progress bar indicates step 3 is active. The form includes input fields for 'Joe', 'Sample', 'joe@testco.com', two password fields (each with a strength indicator), a dropdown menu for 'What is your father's middle name?' (set to 'Bart'), and a 'Bart' input field.

This screenshot shows the final step, 'Review & submit your registration'. The progress bar indicates step 4 is active. It displays a summary of the entered information under two sections: 'COMPANY DETAILS' and 'LOGIN INFO'. Each section has an 'EDIT' link. The company details include 'Test Company', 'www.testco.com', and '123 Main Street, Anytown, Florida, 33024'. The login info includes 'joe@testco.com', 'Joe', and 'Sample'.

Click here to view more information: <https://kleo.force.com/classwallet/s/article/Enroll-DirectPay-Vendor>

# Linking Your Bank Account

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# Link Bank Account

In order to receive payments, you need to link your bank account within your ClassWallet account. Click the “Link Account” button to begin linking your bank account. This will start another wizard.

Steps 1- 5: Enter your bank account information (account number, routing number, bank name, name on account, and display / nickname for bank)

Step 6: Complete the W-9 Form

The image shows a three-step process for linking a bank account:

- Step 1:** A form titled "What's your bank account number?" with fields for "Bank account number" and "Re-enter bank account number". Below the fields is a graphic of a check with "Account Number" labeled. Buttons for "BACK" and "NEXT" are at the bottom.
- Step 2:** A form titled "You have completed all required fields. Please click 'Continue'". It contains fields for address (123 Main Street, Anytown USA 33024), name (Joe Sample), and a W-9 form. A "Continue" button is at the bottom right.
- Step 3:** A confirmation screen titled "Step 1 to link your bank account is now complete!". It states: "ClassWallet is going to make 2 small deposits into your bank account for \$0.10 or less. You will need to know those two amounts for completing the final step of the process to link your account." A "CLOSE" button is at the bottom.

Click here to view more information: <https://kleo.force.com/classwallet/s/article/Link-bank-account-DirectPay-Vendors>

# Receiving Payments

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# Invoice Guidelines

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**To receive payment approval, a complete invoice must be provided** for UFAS recipients. The invoice must be uploaded into ClassWallet by parents in **PDF, JPEG, or PNG file format**. No handwritten documentation will be accepted.

## Documentation must include the following:

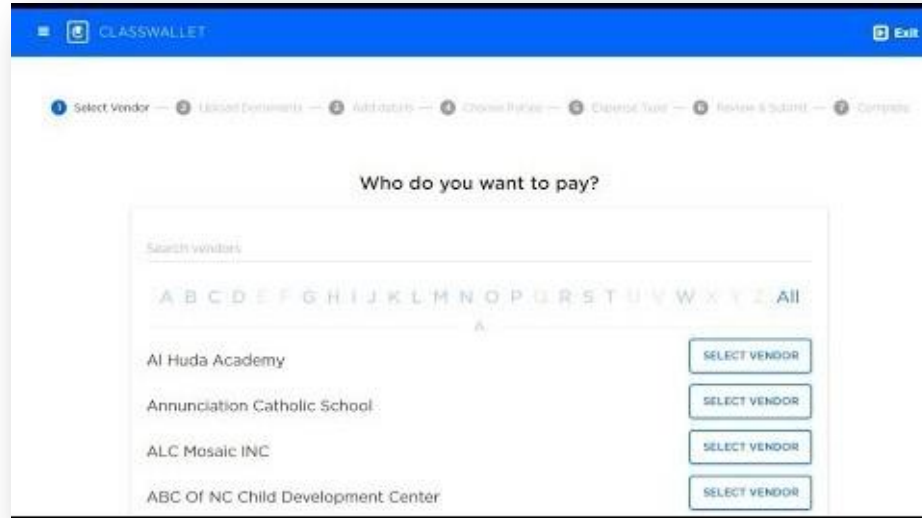
- Scholarship Student's Full Legal Name: The invoice must include the full, legal first and last name of the scholarship student(s). The student's full legal name may be in an itemized line item OR at the top of the invoice.
- An invoice may only have approved items or services related to the scholarship students named.
- Name of the Qualifying Provider: Provider that offered the services or materials.
- Date(s) of Service: Dates when the educational service was provided or when the educational material was purchased.
- Invoice Date: Date on which the invoice was created.
- Itemized List of Scholarship Expenses: Provide a detailed description of each expense related to the educational service or material. The invoice may not include any items or services that are not an approved expense. If the item is prohibited, or if pre-approval was required and not obtained, the invoice will be denied in ClassWallet.
- Total Amount Due: Clearly state the total amount that is due for the educational services or materials provided. Taxes and fees are included.
- Payment Due Date: Include the date by which the payment is due.

# Visible and Ready for Payments

Within 24-48 hours of verifying your bank account, your business will be made visible to parents and they can begin issuing payments. Parents will be required to provide an invoice and/or other required documentation as outlined by the UFA Program Manager, ACE Scholarships. View the [UFA Provider Handbook](#).

## If you wish to view the process as a parent user, you can:

- view step-by-step instructions here:  
<https://classwallet.my.site.com/classwallet/s/article/How-to-pay-a-vendor>
- or watch a short 2-minute video here:  
<https://youtu.be/vt0oLysesB4>



# Other Important Information

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# Vendor Settings | Vendor Profile

As a DirectPay vendor, you will be able to view how your Company name is listed on the platform and add your company's website.

DirectPay vendors can add a description that will enable customers to have a better understanding of what product and/or services your company offers. You may also update your business and billing addresses and choose whether those addresses are visible to users.

### Vendor Profile

Company name \*

Website \*

Description

### Billing address \*

City \*

State \*

Phone (optional)

ZIP code \*

Make visible to users

# DirectPay User Management

The DirectPay User Management tile allows DirectPay vendor owners/administrators to add and manage users. Vendor account administrators can invite other team members to access the vendor account and control their level of access by designating them either as an 'Admin' or 'User.'

**Admin:** Acquires all of the User permissions, plus the ability to Invite other Users and Administrators, update the linked bank account for payments, and manage vendor profile information.

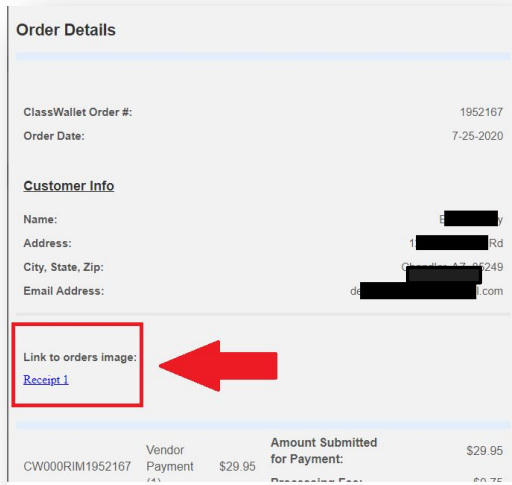
**User:** Can view Payment Reports and manage their own Credentials.

The screenshot displays the DirectPay User Management interface. At the top, there is a 'User Management' tile with a mail icon and two buttons: 'Manage Users' and 'Send Invitation'. Below this is a 'Manage users' section featuring a search bar and a table with the following columns: Name, Email, Status, Role, and Actions. The table contains three rows: two with 'Pending' status and 'Admin' role, and one with 'Active' status and 'Owner' role. To the right is an 'Invite vendor' form with input fields for Name, Last name, and Email, a dropdown menu for Role (set to 'Select a role'), and a blue 'SEND INVITATION' button.

# Records for Approved Payments

When a payment is approved, you will receive an email confirmation from ClassWallet it will contain a link to all the images that the user has uploaded.

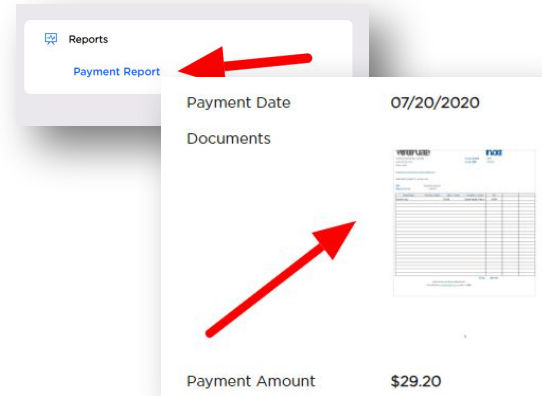
This link will expire in 7 days.



The screenshot shows the 'Order Details' page in ClassWallet. It includes fields for 'ClassWallet Order #' (1952167) and 'Order Date' (7-25-2020). Under 'Customer Info', there are fields for Name, Address, City, State, Zip, and Email Address, all of which are redacted with black boxes. A red box highlights a link labeled 'Receipt\_1' under the heading 'Link to orders image:'. At the bottom, a table shows 'Vendor Payment' for 'CW000RIM1952167' with an amount of '\$29.95' and a 'Payment Amount' of '\$29.95'.

A more permanent record is available in the ClassWallet vendor application:

- Log in to your ClassWallet account at [vendor.classwallet.com](https://vendor.classwallet.com)
- Open the payment report
- Click on the row of the transaction and the image will be available under the order info.



The screenshot shows the 'Reports' page in the ClassWallet vendor application. A red arrow points to the 'Payment Report' link. Below, the 'Payment Date' is shown as '07/20/2020'. Under 'Documents', a red arrow points to a thumbnail of a receipt. At the bottom, the 'Payment Amount' is listed as '\$29.20'.

# Processing Fee

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ClassWallet payments for Direct Pay vendors are subject to a 2.5% processing fee which is applied to the entire payment amount.

Example:

Amount For Services/ Goods	Total Invoice Amount to User	\$500.00
Processing Fee*	2.5%	\$12.50

\*2.5% of \$500 = \$487.50 settlement amount

**\*More information on the 2.5% processing fee can be found [here](#).**

# View and Access Reports

We have updated the transaction report to include a transaction ID, processing status and last updated date to the existing report. Upon ACE Scholarships approval of the payment, the provider will receive confirmation, along with any uploaded documents. Most transactions settle to the bank account linked within 2-10 business days.

1. **Queued** = These transactions are being readied for processing.
2. **Initiated** = These transactions have been sent to our processor.
3. **Processing** = Funds are moving between accounts. User Account -> Processor Account -> Your Account
4. **Settled** = You should see the deposit in your bank account

Transactions can be cancelled or returned and that will show up in the status as well.

All banks receive the transaction ID when we send an ACH. Not every bank will display it conveniently (though most do). That said, you should be able to run a report and get it from them.

Order ID	User Name	Payment Date	Payment Amount	Fee	Total	Status	Last Update	Transaction ID
1636587	Jessica Quintana	01/29/2020	\$1392.18	\$35.73	\$1427.88	Queued	01/29/2020	NA
1636627	Nancy Quintana-Folk	01/29/2020	\$1511.30	\$38.75	\$1550.05	Queued	01/29/2020	NA
1627603	Justin Gonzalez-Mendez	01/28/2020	\$1467.37	\$37.63	\$1505.00	Settled	01/30/2020	5e306e.....4ef72c
1613679	Vianney Enriquez	01/24/2020	\$1210.44	\$31.04	\$1241.48	Settled	01/28/2020	5e2b.....56108
1614635	Melaki-Gott-Goto-Ayero	01/24/2020	\$1277.25	\$32.75	\$1310.00	Settled	01/28/2020	5e2b.....2161c5
1611721	.....	01/23/2020	\$1413.75	\$36.25	\$1450.00	Settled	01/28/2020	5e2.....42264c569
1609609	Anthony-Gonzalez	01/23/2020	\$1486.87	\$38.13	\$1525.00	Settled	01/28/2020	5e29be867.....1f
1609617	Wendy-Gonzalez	01/23/2020	\$1365.00	\$35.00	\$1400.00	Settled	01/28/2020	5e2.....542194
1566623	Elijah-Martia	01/13/2020	\$1471.88	\$37.74	\$1509.62	Settled	01/22/2020	5e2083094f.....52



# General Questions About Security

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We highly value your security. We have complete SOC1 audits and spend a great deal of effort to ensure that our platform is secure.

## **Sharing Information and Files**

All data at ClassWallet is stored securely and classified according to the data classification policy. ClassWallet is SOC compliant and subject to annual reviews by third-party auditors with regards to our data security and privacy policies. All data transmitted over public and wireless networks is encrypted with strong encryption techniques.

Our partner stores the bank account information independent of any personal information about the user. What they do store is never stored anywhere other than their encrypted, vault-like servers that are protected both physically and electronically. Most of their storage servers are not connected to the internet and can only be accessed by a single IP address that allows them to send withdrawal and deposit requests directly to the bank. This limits the exposure of ClassWallet users financial information.

View more information here: [General questions about security](#)

# Contact Information for Questions

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Contact **ClassWallet** support for questions on:

- Anything related to your ClassWallet registration, account, and payments

- Start a live chat or view ClassWallet's Knowledge Base at <https://classwallet.my.site.com/classwallet/s/>
- Email: [help@classwallet.com](mailto:help@classwallet.com)

Customer Support Hours:  
Monday - Friday: 6 AM to 6 PM MST  
Saturday: 8 AM to 2PM MST

Contact ACE Scholarships for questions related to:

- Program administration
- Application process

- Website: <https://ufascholarships.com>
- Email: [support@ufascholarship.com](mailto:support@ufascholarship.com)
- Call: (385) 503-8327

Customer Support Hours:  
Monday - Friday: 6 AM to 6 PM MST

# Thank You!



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[UFASCHOLARSHIP.COM](https://ufascholarship.com)