



ACCESSING

FACTS Family Portal

FACTS gives you the opportunity to get more involved in your child's academic progress and future success by using FACTS Family Portal, a private and secure portal that allows you to view academic information specific to your children, while protecting their information from others. You may view your child's grades, attendance, homework, conduct, as well as other useful school information.

The username and password you created for your student's enrollment packet will also be the username and password for Family Portal.

HOW TO ACCESS FACTS FAMILY PORTAL

1. From FACTSmgt.com, click **Family Login**, then click **FACTS Family Portal**.
2. Type your school's **District Code** **STAQ-LA**
3. Type the enrollment **Username** and **Password** you previously created.
4. Click **Log In**.

If you have forgotten your password, click the **Forgot password?** link.

Accessing the Financial Management System

For schools using Premier Integration, Customers and Authorized Parties will access the Financial Management system via the Financial area of their Family Portal. The options available depend on the features in use by the school, as well as the actions available to the user.

This article provides a sample of a typical process, but the appearance will vary based on how the school is configured. The images displayed may not match what your customers see, but the experience should be similar.

Logging into Family Portal

Customers and Authorized Parties can log into the Family Portal by navigating to www.factsmgt.com and clicking **FACTS Family Portal** under the **Family Log in** menu. Even if the user wants to view Payment Plans or Financial Aid information, they must click FACTS Family Portal to log in.



Passing into FACTS Financial Management

Customers and Authorized Parties will pass over to the Financial Management system by clicking one of the links listed in the **Financial Links** area. The links that appear may vary depending on what options the school offers and where the user is in various processes. The **Financial Home** link will always appear, though. This will take them to the home page of the Financial Management system.

Tip

If the Set up a Payment Plan or Apply for Grant & Aid links are not showing for your families, check that your school configuration has these features turned on. For more information, see [Manage Family Portal Configuration Options](#).

Family Portal

Northwood Academy
20XX-20XX DA

Notifications

You have an amount past due (See below)

Prepay Accounts

20XX-20XX School Year

Cafeteria	0.00
Daniel Adkins School Store	0.00
Lilly Adams School Store	0.00

ADD FUNDS

Balances

20XX-20XX School Year

Payment Plan	2,250.00
Incidental Expenses	0.00

Click Financial Home to see past due

MAKE A PAYMENT

Financial Links

Financial Home

Set up a Payment Plan

Apply for Grant & Aid

Returning to Family Portal

If the user clicks a link or button that is an action, such as 'Make a Payment' or 'Set up a Payment Plan', the user should be returned to the Family Portal when the task is complete.

If the user is on the Financial Home screen, they can return to the Family Portal by clicking the **Return** or **Sign Out** icon at the top right corner of their page.



Hello Daniel



Payment Plan & Billing

Daniel Adkins #5001732675

For Daniel Adkins and Lilly Adams

Current Balance
\$2,321.00**Make a Payment****View Details**

20XX-20XX SCHOOL YEAR

Payment Plan (101 141 770) **Actions**

AMOUNT DUE

\$2,250.00

Plan owned by Daniel Adkins

20XX-20XX SCHOOL YEAR

! Incidental Expenses **Actions**

AMOUNT DUE

\$58.00

Past Due - There is a past due balance of \$58.00.

Make a Payment

Prepay Accounts

View Details

Daniel Adkins #5001732675

For Daniel Adkins and Lilly Adams

Add Funds

20XX-20XX SCHOOL YEAR	BALANCE
After Care - Daniel Adkins	\$0.00
Cafeteria - Daniel Adkins	\$0.00
School Store - Daniel Adkins	\$0.00
School Store - Lilly Adams	\$0.00

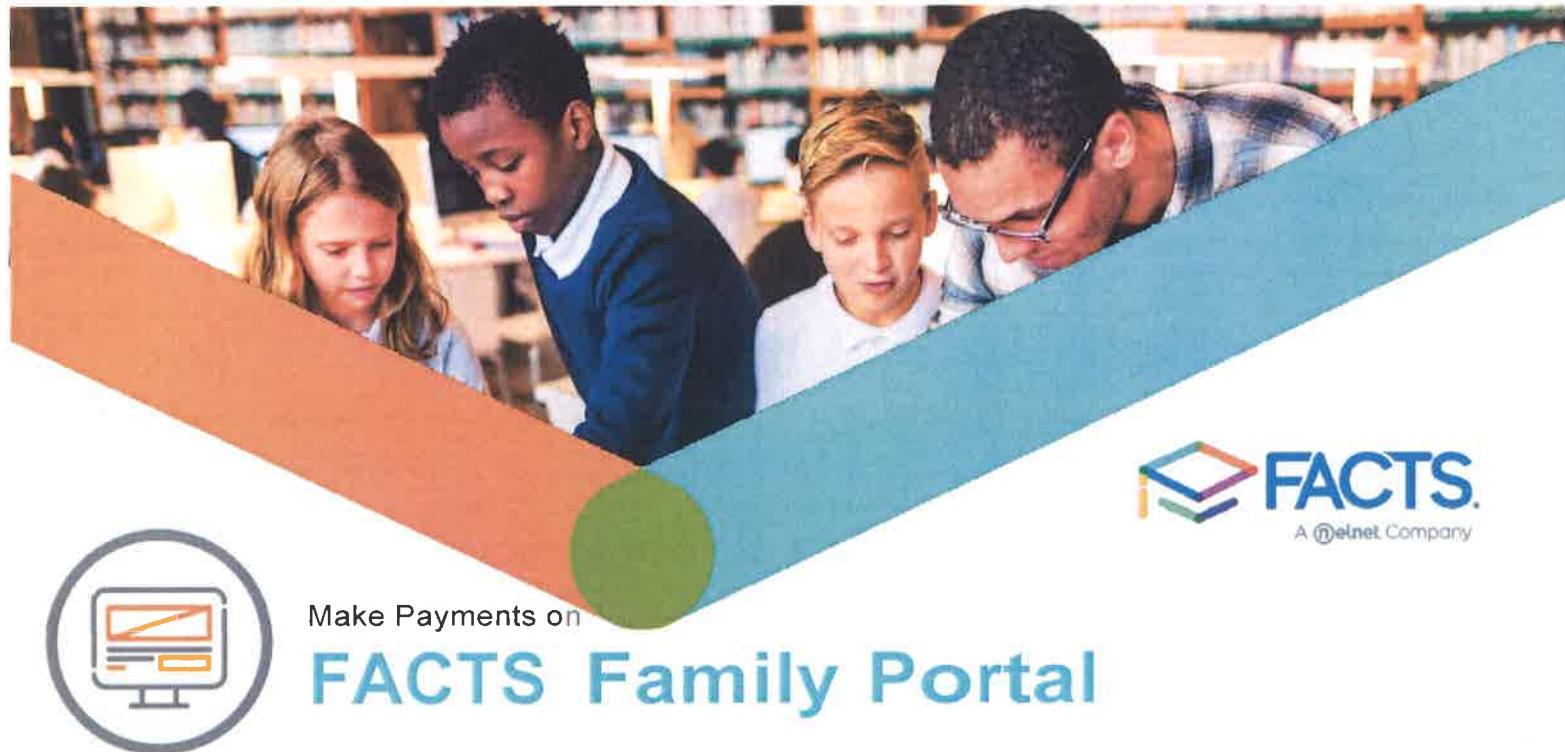
Daniel Adkins

test@email.com

Register to receive text services on your mobile phone.

Wells - 5454

Sarah Adkins is an Authorized Party on your account.



Make Payments on
FACTS Family Portal



FACTS Incidental Billing allows your school to create incidental charges separate from a payment plan. Invoices are emailed or mailed from FACTS Management, depending on your preferred correspondence method. You may make a payment through the Family Portal or by calling FACTS at 866.441.4637.

HOW TO MAKE A PAYMENT THROUGH FAMILY PORTAL

1. From FACTSmgt.com, click **Family Login**, then click **FACTS Family Portal** and log in.
2. Select **Financial** from the menu to view your balance or make a payment.

MAKE A PAYMENT

Click **Make a Payment** to access the FACTS Financial Payment screen.

1. Click the balance you'd like to pay. Remember, past-due payments must be paid first.
2. Click **Next-Payment Method**.
3. Choose an existing **Payment Method** or **Add a New Account**.
4. Click **Pay Now**.

SET UP AUTO PAY

Click **Financial Home** and click **Actions to Enroll in Auto Pay**.

1. Choose an existing **Payment Method** or **Add a New Account**.
2. Click **Enroll**.

Making an Online Payment

Customers can make payments online for past due amounts, invoices, and scheduled payments on the same payment screen.

Navigation

Customers can access the payment screen 2 ways:

1. A link in an email from FACTS
2. From their user account



Premier Integration Users

If your school is using [Premier Integration](#), your customers will start an online payment from the Family Portal. For more information, see [Make a Payment or Add Funds from Family Portal](#).

Email Link

When following a link, the customer can make a payment **without signing in**. However, if they want to use stored financial account information, they will need to sign in.

- Click **Make A Payment** to proceed without signing in.
- Click **Sign In** to use stored financial account information.

Hello, Grace. Make a secure, one-time payment towards your Lincoln Academy of FACTS balance.

Make A Payment

[View Payment Schedule](#) | [Mail in Payment](#)

or [Sign in](#) to use your stored financial accounts

User Account

When signed in to a user account, the user will be able to click **Make A Payment** to proceed.

 **Payment Plan & Billing** [View Details](#)

Heather Pierce #1002358602
For Sarah Smith and Tim Smith

Current Balance
\$13,819.00

[Make a Payment](#)

SCHOOL YEAR	AMOUNT DUE
Payment Plan (101 132 617) Actions ▾	\$13,509.00
Incidental Expenses Actions ▾	\$310.00

Step 1: Select a payment

Payments Due within 30 Days

- Any scheduled payments due within the next 30 days will be listed and can be selected for payment.

Other Payment Options

- Check the box to pay the balance in full.
- Check **Other Amount** to see the schedule of upcoming payments.
 - Check box(es) to the left of the payment(s) will be open for selection and a Payment Amount column is displayed.
 - Up to 5 scheduled payments will be displayed – to view more, click **Show All Payments**
 - When a payment is selected, the amount displayed in the Payment Amount box may be changed by the customer.
 - Incidental invoices may not allow partial payments if the school chose not to allow them.

Note

If there are payments already in process, a notice will be displayed upon launching Make a Payment and an alert bar is shown at the top of the page.

 [View Payments in Process](#)

The bar appears when an online payment has been submitted until the file process has been run. For scheduled payments, it appears only when it's been picked up in the file until the file process is done running. Once the file is done running, payments that were in the schedule are no longer in the list of payments to choose from for online payments, and any processed payments are no longer included in the balance.

Click **Next**.

Make A Payment

Heather Pierce #1002358602

1 Select A Payment

2 Payment Method

3 Receipt

 Back to Home

Select a Term to Pay

Want to designate another payer?

School Year - \$13,819.00

Automatic payment

Payments Due Within 30 Days

- 04 Sep [REDACTED] - Payment Plans (101 132 617) - \$1,501.00 
- 14 Sep [REDACTED] - Incidental Expenses - \$310.00 

Other Payment Options

- Full Term Balance of \$13,819.00
- Other Amount

Upcoming Payments

DUE DATE	AMOUNT DUE	PAYMENT AMOUNT
<input type="checkbox"/> 04 Sep [REDACTED] - Payment Plans (101 132 617) 	\$1,501.00	<input type="text"/> \$ Enter Amount
<input type="checkbox"/> 14 Sep [REDACTED] - Incidental Expenses 	\$310.00	<input type="text"/> \$ Enter Amount
<input type="checkbox"/> 01 Oct [REDACTED] - Payment Plans (101 132 617) 	\$1,501.00	<input type="text"/> \$ Enter Amount
<input type="checkbox"/> 01 Nov [REDACTED] - Payment Plans (101 132 617) 	\$1,501.00	<input type="text"/> \$ Enter Amount
<input type="checkbox"/> 03 Dec [REDACTED] - Payment Plans (101 132 617) 	\$1,501.00	<input type="text"/> \$ Enter Amount

[Show All Payments](#)

PAYMENT AMOUNT **\$0.00**

[Cancel](#)

[Next - Payment Method](#)

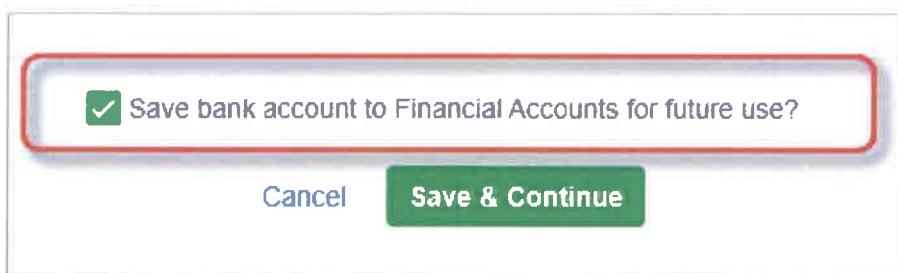
Step 2: Payment method

- **Select your Payment Method:**

- If signed in, choose from a stored account on file or enter a new account.
The new account can be entered for a one-time use or saved to the customer record.
- If not signed in, enter a new account.

◦ **Note for adding a new account when the user is signed in**

The new account is only used for this specific payment, but the customer can check the box to store the financial account for future use. Once the payment is submitted, the financial account will appear in the [Financial Accounts](#) list but will show as not used by any activity.



If they do not opt to store the account, it will not appear in the Financial Accounts list and will not be available to select the next time they make an online payment.

- **Total Amount:** The amount being paid today is displayed
- **Authorization:** By clicking **Pay \$ Now**, the customer is accepting the terms listed.

If the customer has a valid email address on file, a [payment confirmation](#) is sent to that address. The customer can elect to have the same notice sent to up to 2 additional email addresses by clicking **Add**.

Make A Payment

Janie And Roger Giffilan #1000991966

1 Select A Payment

2 Payment Method

3 Receipt

Payment Method

Wells Fargo ending in 6789

or Add a New Account

Payment Method Disclosure

The following processing fees apply:

- Credit Card - up to %
- Debit Card - up to %
- Checking or Savings Account - no fee

Card transactions for Training are processed by FACTS Management Company, USA.

FACTS Returned Payment Fee Policy

Total Amount

Institution Amount \$500.00

Total **\$500.00**

A transaction receipt will be sent to: [Add](#)

Authorization

By clicking the Pay Now button, you authorize FACTS to process this payment from the financial account identified above.

This is an immediate payment and cannot be canceled.

[Cancel](#)

[Pay \\$500.00 Now](#)

Step 3: Confirmation

This page is a printable confirmation of the payment that was submitted.

Click **Proceed to Home** to leave the payment screen.

 **Thank You**

Your payment for \$500.00 has been authorized and submitted.

A transaction receipt was sent to jgillilan@factsmatters.org.

[Proceed to Home](#)

Summary

Institution	Training
Customer	Janie and Roger Gillilan
Customer Number	1000991966
Payment Date	15 Aug 2018
Account Holder Name	Janie Gillilan
Account	Wells Fargo - 6789
Institution Payment Amount	\$500.00

This is an immediate one-time payment and cannot be canceled. If you have any questions, contact FACTS at (866)441-4637.

Authorization 

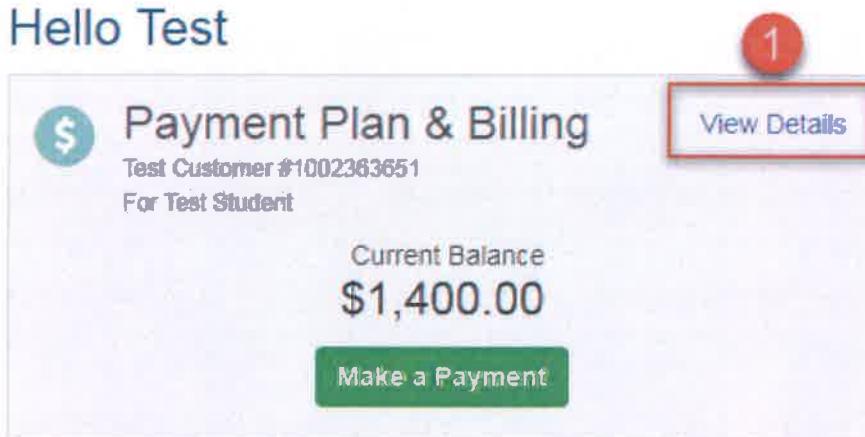
Printable Payment Summary

The Payment Summary shows the total paid for each of the accounts (i.e. Tuition, Day Care, etc.) for each student. The customer can select a year or a date range for the summary. It also includes the school's address and Federal Tax ID, if provided. While many expenses may not be applicable for tax deductions, some families keep record of the expenditures with their taxes.

Steps to printing the payment summary

1. On the home page, click **View Details**.
2. Click **View Payment Summary** on the details screen.
3. Ensure the correct **Calendar Year** or date range is selected.
4. Click **Print**.

Hello Test



Payment Plan & Billing
Test Customer #1002363651
For Test Student

Current Balance
\$1,400.00

Make a Payment

View Details

Activity Details

Test Customer
Customer Number: 1002363651

Term:
All



View Payment Summary

FACTS Payment Processing Policies

Payment Summary

4

Print

i The Payment Summary report is for informational purposes only. It includes payment activity applied to the balance owed to or services rendered by Sample Institution during the selected time frame.

Customer: Test Customer

121 S 13th St, Suite 300
Lincoln, NE 68508
USA

Sample Institution

121 S. 13th Street
Lincoln, NE 68506
USA

Federal Tax ID: 12-1234567

20XX

3

Student: Test Student

Test Student - \$7,600.00

Sample Term	Grade - 1st	\$7,600.00
ACCOUNT		TOTAL
Books		\$200.00
Tuition		\$7,400.00



Note for Payment Forms users

Payments made through Payment Forms are on a separate term from the tuition term. Also, they are not tied to the customer's user account so the customer does not have access to a Payment Summary for the Payment Forms term. However, they are sent a payment receipt each time they make a payment through Payment Forms.

Institution users can navigate to the [Customer Profile: Consumer View](#) for the customer record on the Payment Forms term. Keep in mind that a customer record is created for each form/payment completed.