

FACTS Consumer Account

Introduction:

Once you have established your user account with FACTS, you can manage your account online at <https://online.factsmgt.com>.

If you have forgotten your Username or Password, there is a link on the sign in page to help you recover or reset the missing information.

Actions you can take:

1. Make an online payment – make up missed payments or pay ahead (*this option may not be available at your school*)
2. Change the financial account you are using for payments through the Financial Accounts option or the Actions dropdown
3. Link another service (payment plan or billing) to your online account
4. Click **View Details** to see the activity for your account
5. Update your personal information (contact info, online and phone access, manage payers, communication settings)
6. Notification Center – Houses all correspondence that is sent to you through the FACTS system

Dashboard:

Home My Profile Financial Accounts 2 Signed in as Test 6

Hello Test

Payment Plan & Billing View Details 4
Hershey Krackel #1001530110
For Arthur Krackel and Jen Krackel

Current Balance
\$2,550.00 1
Make a Payment

SCHOOL YEAR	AMOUNT DUE
Payment Plan (101 054 809) Actions 2	\$2,500.00
Incidental Expenses Actions 2	\$50.00

Test

- @factsmgt.com
- Register to receive text services on your mobile phone.
- Bank
- Want to allow a friend or family member to pay toward your balance? Add an Authorized Party.
- 3 Have another activity you want to link?

Dashboard (My Profile):

Home My Profile 5 Financial Accounts Signed in as Test

My Profile

Contact Information Edit

- Address**
123 Main
Lincoln, NE 68516
United States
- E-mail Addresses**
mytestaccount@factsmgt.com
- Phone Numbers**
Daytime: (555)555-5555

Communication Settings Edit

- Text Services**
You are not currently registered for Text Services.
Text Inquiry: Get your balance and make a payment anywhere and anytime. All you have to do is text **BAL**.
Payment Reminders: We will send you payment reminders before your next payment is due.
- Notifications**
Payment Reminders: E-mail
Other Notifications: E-mail

Online Access Edit

- Username and Password**
testcustp11

Authentication Edit

- Phone Authentication**
Q: What is the first name of your favorite aunt?
A: aunt
Q: What is the first name of your favorite uncle?
A: uncle

Manage Payers Add

Customer # 1000640654 - \$9,550.00 remaining balance

- Test Authparty** Edit
This authorized party has not signed up online yet.

Details:

- Back to Home: Returns you to your Dashboard
- View Payment Summary: Printable summary of payments that displays them per fiscal year or specific date range and will display your institution's Federal Tax ID if it has been provided to FACTS.
- Term: You can select a specific term to view the details of or can select All.
- FACTS Payment Processing Policies: Review the policies for Automatic Payments and Returned Payment Fees.

[← Back to Home](#)

Activity Details

Hershey Krackel
Customer Number: 1001530110

Term:

All ▼

[View Payment Summary](#)

[FACTS Payment Processing Policies](#)

Schedule: Displays your upcoming schedule of payments. 'View Full Schedule' displays your past scheduled payment dates.

[Schedule](#)

[Transactions](#)


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[Payments Made](#)

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Upcoming Payments

[View Full Schedule](#)

 Automatic Payment

> Due Date: 12 Feb 2018 	Payment Plans (101 054 809)	Amount Due: \$500.00
> Due Date: 27 Feb 2018 	Incidental Expenses	Amount Due: \$50.00

Transactions: Displays all of your transactions with the Adjustment Reason/Description if applicable and offers filtering by date, customer/student, and account.

[Schedule](#)

[Transactions](#)

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Transactions

Past 90 Days ▼

All Customers/Students ▼

All Accounts ▼

DATE	NAME	ACCOUNT	TRANSACTION TYPE	ADJUSTMENT AMOUNT	AMOUNT DUE	CREDIT BALANCE
22 Jan 2018	Arthur Krackel	Lunch	Payment - Payment at Institution - Check 244-Lunch (22 Jan 2018)	-\$50.00	\$2,550.00	\$0.00
22 Jan 2018	Arthur Krackel	Lunch	Charge - Charges Added - Balance Adjustment	\$25.00	\$2,550.00	\$50.00

Balances: Displays your balances. You can choose to expand the view to display the balances by institution account.

Schedule Transactions **Balances** Payments Made Changes

Balances

Total Amount Due: \$2,550.00

Arthur Krackel Amount Due: \$2,550.00

TERM	ACCOUNT	CHARGES	PAYMENTS	AMOUNT DUE
School Year	Books	\$50.00	\$0.00	\$50.00
School Year	Tuition	\$2,500.00	\$0.00	\$2,500.00

Payments Made: Displays your successful payments. Can be filtered by date range or whether the payments were successful or not.

Schedule Transactions Balances **Payments Made** Changes

Payments Made

Past 90 Days Successful

EFFECTIVE DATE	PAYER NAME	DESCRIPTION	AMOUNT
22 Jan 2018	Hershey Krackel	Manual Payment Received at Institution	\$50.00

Changes: Displays all changes made on your record. You can filter to a specific date range. The Description is a hyperlink that will take you into more details.

Schedule Transactions Balances Payments Made **Changes**

Changes

Past 90 Days

EFFECTIVE DATE	TYPE	DESCRIPTION
23 Jan 2018	Change	New Payment Schedule - Payment Plan (101 054 809)
22 Jan 2018	Payment	Manual Payment Received at Institution - Prepay Accounts (1001530110)
22 Jan 2018	Adjustment	Charges Added - Prepay Accounts (1001530110)