

# ELEVATE '19

Session Name:	FACTS Financial Products: The Family Experience (Tuition)
Trainer:	Jackie Sutton
Length of Class:	1 hour
Description:	This session will help your school with best business practices for managing your data to get the most out of your reports. It will cover best use of institution accounts and adjustment reasons when applying charges, credits, payments, corrections, and transfers.

---

## FACTS Financial Products: The Family Experience Outline

### Getting Started

- Info: Lincoln Academy of FACTS (93)  
<https://test.online.factsmgt.com/d5/inst/3C4TF/profile/general-info/view>  
School link:  
<https://test.online.factsmgt.com/d5/signin/3C4TF>

### Look At New/Returning Families

- Common family setup mistakes
- How to direct families when they are stuck
- Verification notices for returning families (use of notices)

### Confirmation Letters for Finalized Contracts

### Flyer Letters and Dashboard Location of the Link

### Login Process for New Families

- My Profile Layout  
*What changes can parents make? (plan owner switch)*  
*What details can they see?*  
*Consumer Driven Changes*

### Consumer Driven Changes

- Payment Date Changes  
*What options does the school have?*  
*Summer Changes*

### Returned Payments

- Notice sent, \$30 fee if NSF 5 days after return, school late fee, payment reattempt 15 days
- Schools have ability to add late fees in FACTS

### Communication to Families

- Confirmation Notice
- Payment Reminders and Confirmations
- Returned Payment Notice
- Notice of Change
- Financial Account Notices (expired credit card and research banking)
- Invoice Billing and Statements

