FACTS Consumer Account

Introduction:

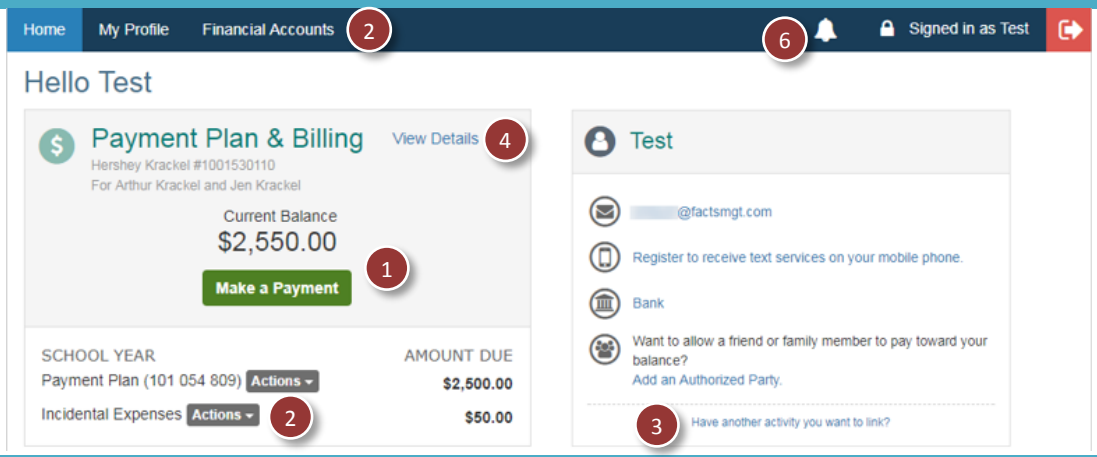
Once you have established your user account with FACTS, you can manage your account online at https://online.factsmgt.com.

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.

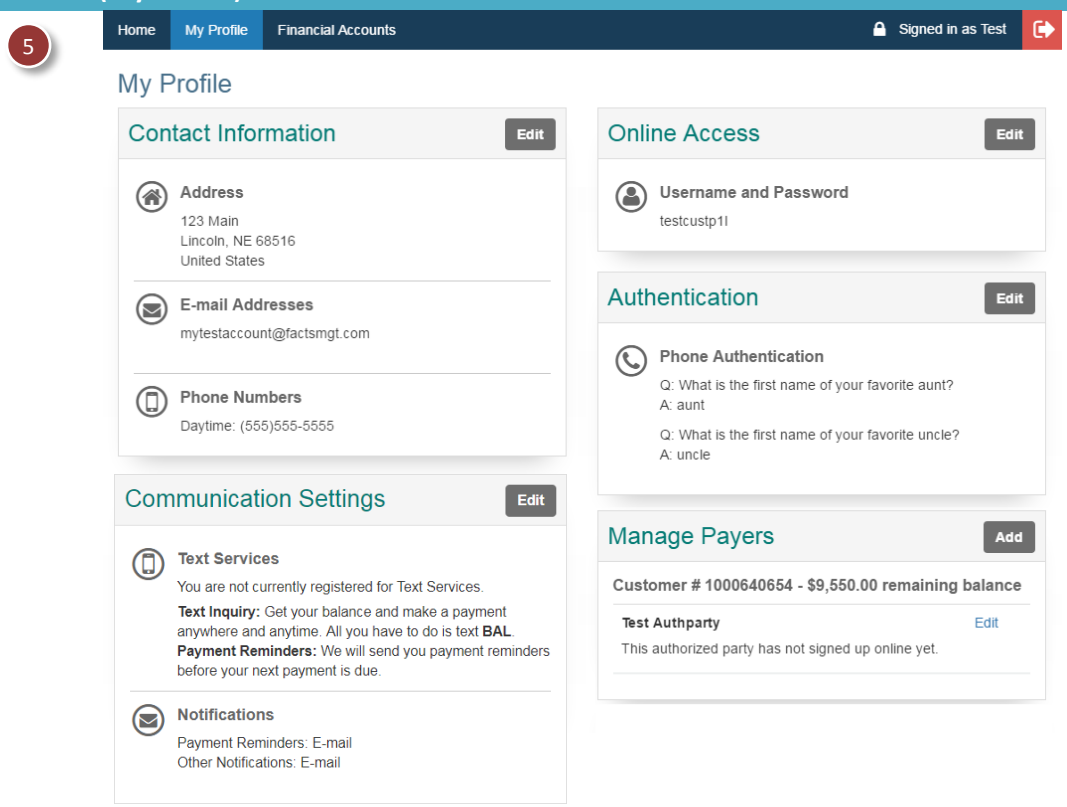
Actions you can take:

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:

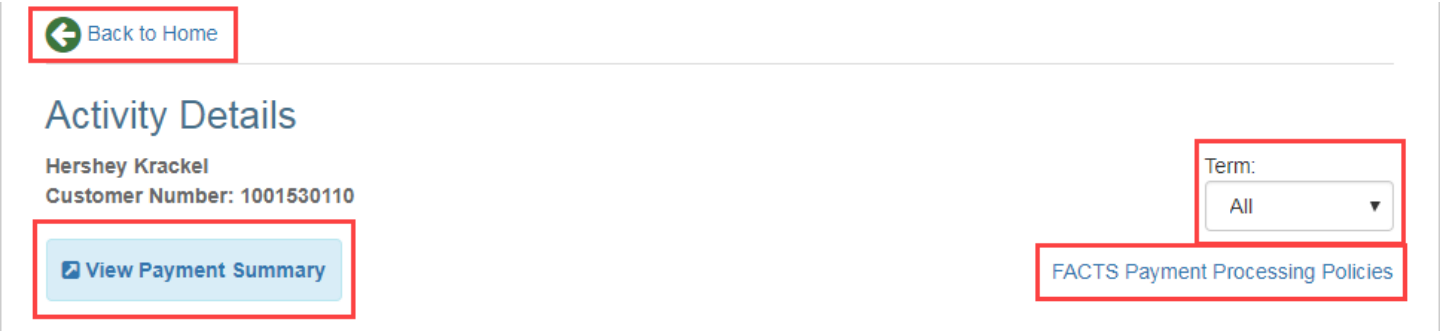


Dashboard (My Profile):

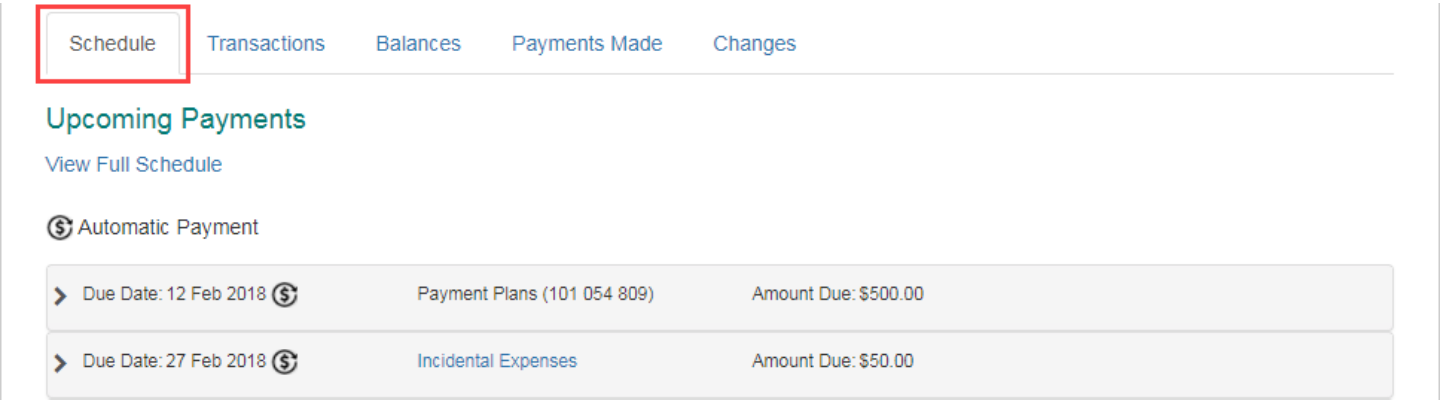


Details:

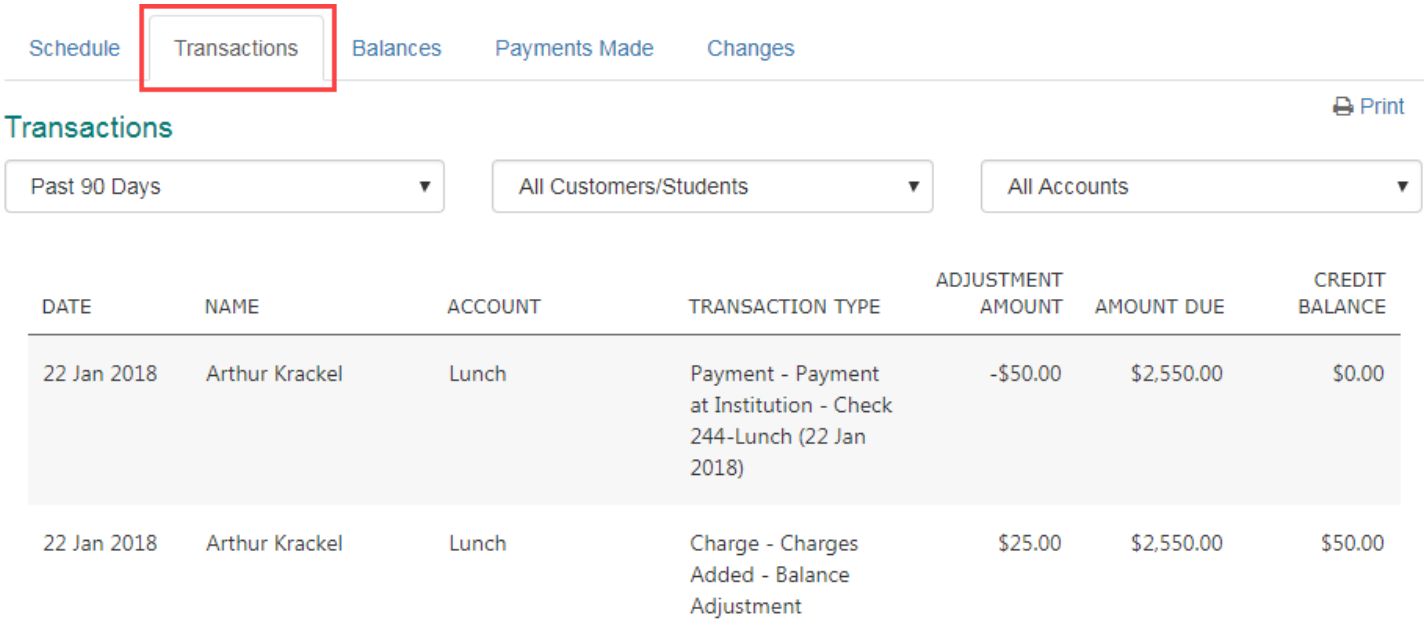
- Back to Home: Returns you to your Dashboard
- View Payment Summary: Printable summary of payments that displays them per fiscal year or specific date range and will display your institution's Federal Tax ID if it has been provided to FACTS.
- Term: You can select a specific term to view the details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



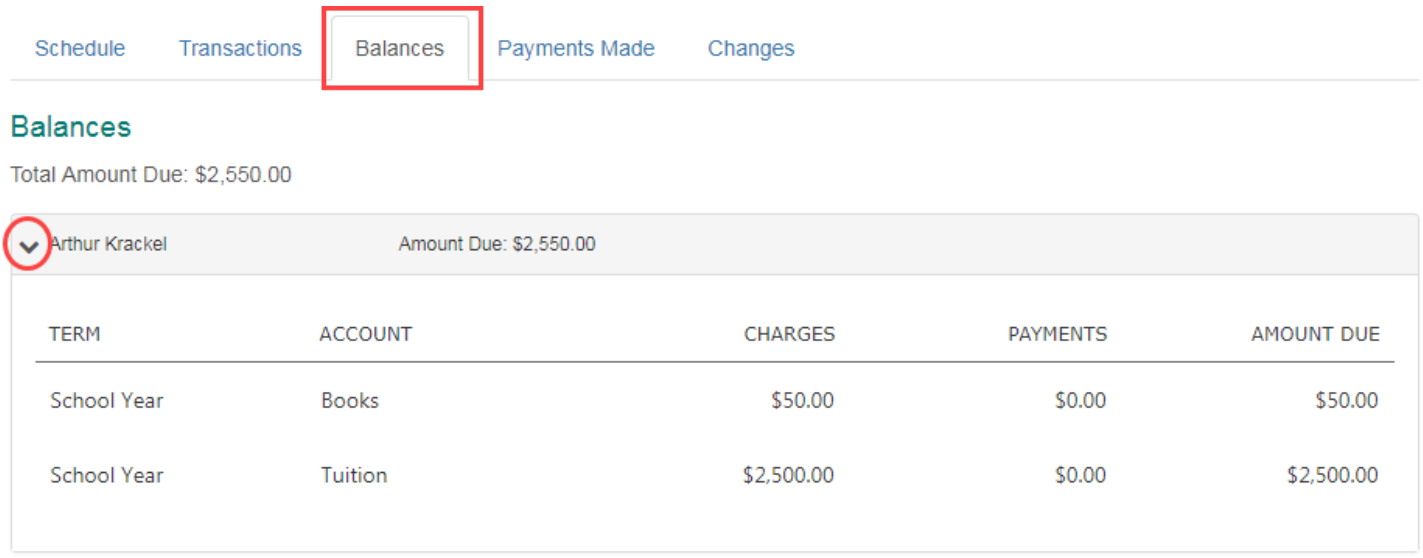
Schedule: Displays your upcoming schedule of payments. 'View Full Schedule' displays your past scheduled payment dates.



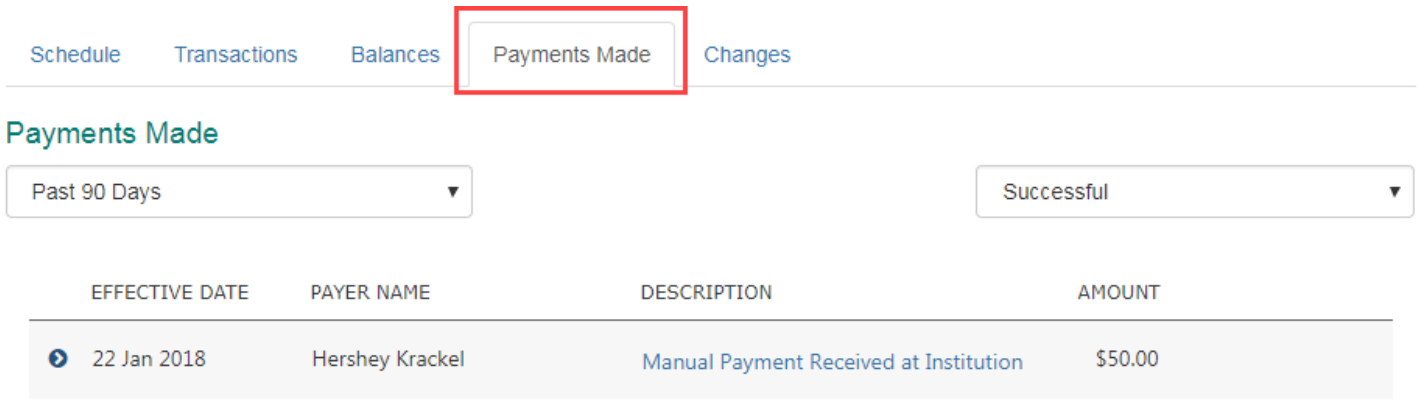
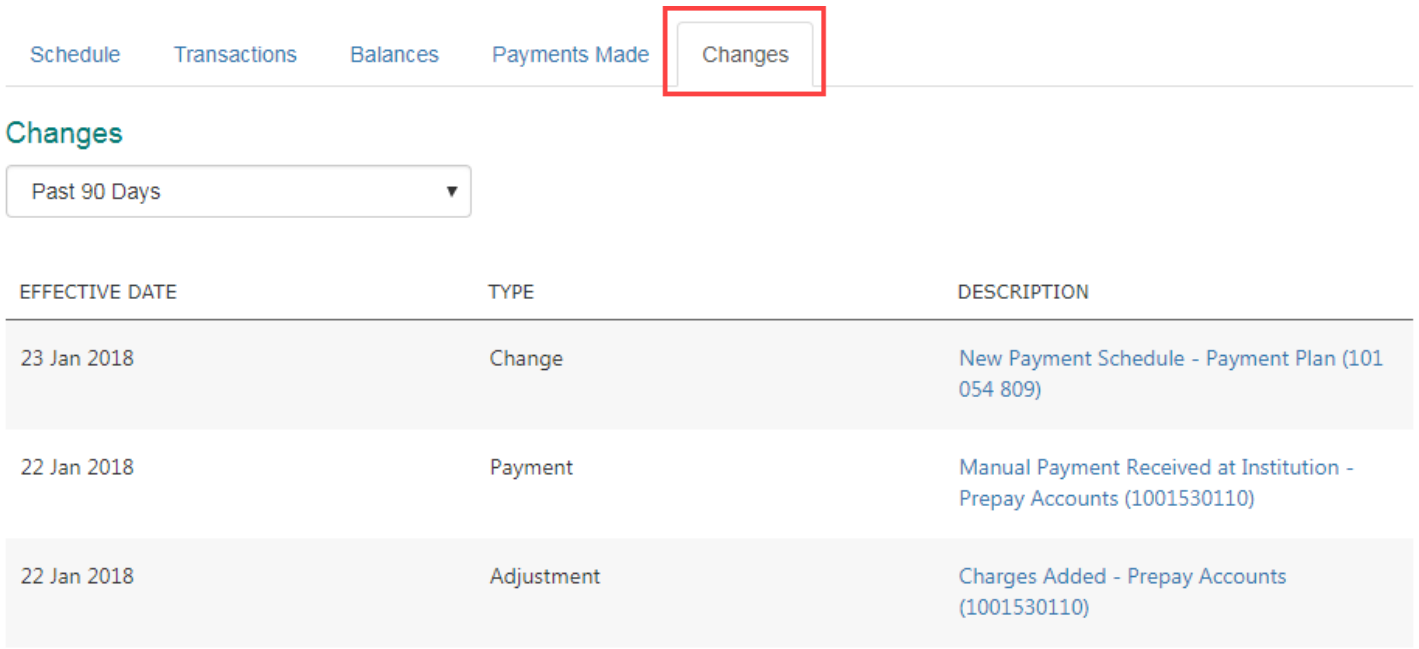
Transactions: Displays all of your transactions with the Adjustment Reason/Description if applicable and offers filtering by date, customer/student, and account.



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



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



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.