



# OUR LADY OF SORROWS SCHOOL

Nursery • Pre-K • K-8 | 172 Academy Street, South Orange, NJ 07079

*A Tradition of Academic Excellence and Catholic Values Since 1891*

Dear Parents,

We are happy to share with you some exciting new changes to our tuition collection process. Since the stability of our school and the quality of its programs are of the utmost importance, we are always seeking ways to make improvements to benefit everyone. After much research and investigation, we have partnered with FACTS Management Company to help us manage our tuition payment program and our financial aid assessment. FACTS is used by many schools locally and over 6,500 schools nationally. We are excited to be working with them and are confident this program will offer greater efficiency and financial stability for the school while providing convenience to families.

Below are a few high level benefits:

- Automatic payments can be made from a checking or savings account or from a variety of credit cards, if applicable. No more writing checks!
- Along with multiple payment plan options, your payments are processed securely through a bank to bank transaction.
- Once you register you can make payments from the convenience of your home or office anytime
- Ability to collect, in the future, all fees (lunch, class trips, after-care, fundraisers, etc).

In April, I along with a few school parents will attend a training session on FACTS. Following the training session (April-May), we will provide additional information, including instructions on how to register on-line. We will also schedule parent information sessions lead by a representative from FACTS to answer any questions you may have. **All parents must be registered before we go live in June 2017.**

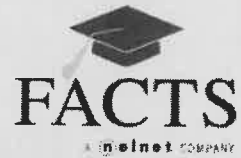
One of our primary goals this year at Our Lady of Sorrows School is to concentrate our efforts on improving the business side of our school. By taking advantage of the security and convenience of payment processing and information technology offered by FACTS, we remain committed to this goal.

Thank you for your continued loyalty. Your continued support and cooperation is appreciated, as we remain committed to our mission.

Sincerely,

Aida Rosa  
School Business Manager

# Setting up a FACTS Payment Plan



Here are some items you may need:

- Customer or Student ID (provided by the school, if applicable)
- Financial Account information

**1** Go to your school's website to find and select the FACTS information link. On the welcome page click the appropriate option: 'Create a username & password' or 'Sign in'.

- 2** Enter your demographic information (name, address, phone number, email).
- 3** Create a user name, password, and select security questions.
- 4** You are now logged in to your FACTS Account. Select **Set up a Payment Plan**.
- 5** Choose the appropriate term (school year) and click **Continue**.
- 6** **Contact Information:** Review the information and choose a correspondence method.
- 7** **Students:** Each student included in the payment plan must be added.
- 8** **Plan Options:** Select a payment plan and click **Next**. Note information about possible fees.
- 9** **Payment Details:** Enter your financial account information.
- 11** **Payment Schedule:** Select your payment date and review your schedule.
- 10** **Review:** You can select the links to the right to go back and edit the entries. Check the box to agree to the **Terms & Conditions** and click **Submit**.
- 12** **Thank You:** Print or e-mail your confirmation page. It includes your agreement number which can be used to reference your tuition payment plan with your school and FACTS.

You may contact a FACTS representative at (866) 441-4637 with questions.

# FACTS Consumer Account



## Introduction:

Once you have established your user account with FACTS, you can manage your account online at <https://online.factsmgmt.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
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)

## Dashboard:

Home My Profile Financial Accounts **2** Signed in as Test

### Hello Test

#### Payment Plan & Billing **4** View Details

Test Customer # 1000640654  
For Test Student and Test Account

**Current Balance**  
**\$8,800.00**

**1** **Make a Payment**

2016-2017	AMOUNT DUE
Payment Plan (101 030 6D7)	<b>\$8,800.00</b>
Incidental Expenses	<b>\$0.00</b>

Set up a Payment Plan

#### Test Customer

- Two e-mail addresses on file
- Register to receive text alerts on your mobile phone.
- Three Financial Accounts on file
- Test Authparty is an Authorized Party on your account  
Add an Authorized Party

**3** Have another account you want to link?

## Dashboard (My Profile):

Home My Profile Financial Accounts Signed in as Test

### 5 My Profile

#### Contact Information **Edit**

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

#### Online Access **Edit**

- Username and Password**  
testcustp1

#### 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

#### Communication Settings **Edit**

- Text Alerts**  
You are not currently signed up for text alerts
- Notifications**  
Payment Reminders: E-mail  
Other Notifications: E-mail

#### Manage Payers **Add**

Customer # 1000640654 - \$9,550.00 remaining balance

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