

Customer Dashboard



Options:

- Edit personal information (address, phone, email, password and security questions)
- Add, remove or change financial accounts
- Change correspondence method and opt in or out of email payment reminders
- View balances, payment schedules, completed payments, transaction history and correspondence from FACTS
- Make online payments (if allowed by your school)
- Link additional services to your online account

Note: Changes to your payment due date or amount must be approved and completed by your school at least 2 business days in advance of the payment due date.

Navigation:



Log in at <https://online.factsmgt.com>

Contact FACTS / NBS

Sign In

Sign in	
User Name	<input type="text"/>
Password	<input type="password"/>
Forgot User Name / Password?	
<input type="submit" value="Submit"/>	

Register
Click on 'Register' to add activity to your online account or to create a user name and password.
<input type="submit" value="Register"/>

Browser Assistance

Supported Browsers:

- Internet Explorer 7.0 or later (Windows only) ([download](#))
- Mozilla Firefox 3.0 or later (Windows or Mac) ([download](#))
- Safari (Mac Only) ([download](#))

Browser Requirements:

- JavaScript must be enabled ([test](#))
- Cookies must be enabled ([test](#))
- Popup blockers must be disabled ([test](#))

Forgot User Name/Password: You may use this link to request a reminder of your User Name or reset your Password. You may also select this link if your account has been locked.

Register: Click 'Register' only if you do not have an online account. You will need the Online Registration Code from your confirmation letter or invoice.

Browser Assistance: If you are unable to navigate through the site or receive an error notice, check the items under Browser Assistance. If you are still having difficulties, contact FACTS.

Contact FACTS/NBS: This link will provide you with a phone number to contact FACTS and our office hours.

Dashboard:

Dashboard

Details

Summary
Students
Authorized Parties

Payment Plans & Billing

Service	Status	Remaining Amount Due	
Payment Plan (101 027 875)	Active	\$3,100.00	Make a Payment

Customer Information

Customer Name	Brenda Grimes	Customer Number	615187	Edit
Address	1248 Apple St. Lincoln, Nebraska 68512	Daytime Phone	(402) 456 - 7897	
		Evening Phone		
E-mail		Cell Phone		
Correspondence Delivery Method	Postal Mail			

[Link a Service to my online account](#)

Details

- **Summary** – In this area you will see the services you are using with FACTS. Click the link under ‘Service’ to access the Payment Plan or Other Billing option you would like to view.
- **Students** – On this tab you can view the students associated with your User Account.
- **Authorized Parties** – This section will list anyone you have indicated may receive information about your account with FACTS. You may add or remove Authorized Parties on this screen.

Customer Information

- **Edit** – You may edit the address, email and phone fields by selecting the ‘Edit’ link. You may also change how you are receiving correspondence from FACTS. Your options are Postal Mail or Email.
- **Link a Service to my online account** – Use this link to add other payment or billing plans to your online account. You will need the Online Registration Code from your confirmation notice or invoice. Contact FACTS if you need assistance.

Viewing your Payment Plan:

To access your Payment Plan, click the link under ‘Service’ as shown above

Agreement Balance and Payment Detail

Payment Plan Menu

- Balance and Payment Details
- Financial Account
- Make a Payment
- Profile
- Transaction History

Current Status and Summary

Agreement Number	101 027 875	Remaining Institution Balance	3,100.00
Agreement Status	Active	Remaining FACTS Balance	0.00
Financial Account	MasterCard - 5454	Remaining Amount Due	3,100.00

[Update Financial Account](#)

[Make a Payment](#)

Balance and Payment Detail

Balance
Payment Schedule
Payments
Unresolved Payments

Balance Summary

Name	Account	Beginning Balance	Charges / Adjustments	Payments	Remaining Amount Due	Past Due Balance
Ashley Grimes	Activity Fee	100.00	0.00	0.00	100.00	0.00
Ashley Grimes	Tuition	3,000.00	0.00	0.00	3,000.00	0.00
	Totals	3,100.00	0.00	0.00	3,100.00	0.00

Current Status and Summary

- The Agreement Number acts as an account number with FACTS. It is helpful if you have this number available when contacting our office.
- The Agreement Status will be Active, Inactive (temporary hold), or Terminated (permanently canceled).
- The Financial Account is the bank account or credit card you are using as your primary account for this plan. You can select 'Update Financial Account' to make a change. **IMPORTANT: Making a change here only changes the financial account for this specific plan. If you have other plans with FACTS, you must change the financial account on each plan individually.**
- Balances – the Institution Balance is what is owed to the school. The FACTS balance is what is owed to FACTS, such as returned payment fees.

Balance and Payment Detail

Balance

Balance and Payment Detail						
Balance		Payment Schedule	Payments	Unresolved Payments		
Balance Summary						
Name	Account	Beginning Balance	Charges / Adjustments	Payments	Remaining Amount Due	Past Due Balance
Ashley Grimes	Activity Fee	100.00	0.00	0.00	100.00	0.00
Ashley Grimes	Tuition	3,000.00	0.00	0.00	3,000.00	0.00
Totals		3,100.00	0.00	0.00	3,100.00	0.00

- Balances may be broken down by family or student as well as by sub account depending on information provided by your school.

Payment Schedule

Balance and Payment Detail					
Balance		Payment Schedule	Payments	Unresolved Payments	
Payment Schedule					
Expand All Collapse All					
Scheduled Date	Payment Attempt	Description	Amount		
⊕ 07/16/2012	1	Payment 07/15/2012	372.73		
⊕ 08/15/2012	1	Payment 08/15/2012	272.73		
⊕ 09/17/2012	1	Payment 09/15/2012	272.73		
⊕ 10/15/2012	1	Payment 10/15/2012	272.73		
⊕ 11/15/2012	1	Payment 11/15/2012	272.73		
⊕ 12/17/2012	1	Payment 12/15/2012	272.73		
⊕ 01/15/2013	1	Payment 01/15/2013	272.73		
⊕ 02/15/2013	1	Payment 02/15/2013	272.73		
⊕ 03/15/2013	1	Payment 03/15/2013	272.73		
⊕ 04/15/2013	1	Payment 04/15/2013	272.73		
⊕ 05/15/2013	1	Payment 05/15/2013	272.70		
			3,100.00		



- The payments listed here are payments that are scheduled and have not yet been completed.
- Next to each payment is a plus sign. This allows you to expand the view for each payment to see the detail. Again, this will depend on how your school provided balances – by family or student and by sub account.

Payments

Balance and Payment Detail				
Balance	Payment Schedule	Payments	Unresolved Payments	
Payments				
Expand All Collapse All				
	Date	Attempt	Description	Amount
 	10/20/2011	1	Payment 10/20/2011	467.23
				<hr/> 467.23

- The Payments tab shows payments that have already been completed.
- You may click on the blue circle to the left of each payment to see which financial account was used to make the payment.
- The plus sign to the left allows you to expand the view for each payment to see the detail.

Unresolved Payments

Balance and Payment Detail				
Balance	Payment Schedule	Payments	Unresolved Payments	
Expand All Collapse All				
What is an Unresolved Payment?				
Unresolved Institution Payments				
The following payment(s) will no longer be automatically attempted by FACTS Management Company. The payment(s) listed below is past due and still owed to St. School. You may click on the Make a Payment button above to make a payment today.				
	Description			Remaining Amount
	Payment 09/05/2011			98.75
Current Amount Unresolved				98.75
Unresolved FACTS Payments				
The following payment(s) will no longer be automatically attempted by FACTS Management Company. The amount listed below is past due and is still owed and FACTS may require you to pay this amount in the current or a future term. You may click on the Make a Payment button above to make a payment today.				
	Description			Remaining Amount
	Returned Payment Fee			30.00
Current Amount Unresolved				30.00

- An unresolved payment is a payment that will no longer be automatically debited or charged from your financial account. An unresolved payment is considered past due and is still part of the total remaining balance owed.
- You may make a payment online or contact your institution to discuss other options for making up the payment.
- The plus sign to the left of each payment or fee allows you to expand the view for each to see the detail.
- Unpaid FACTS Fees may prevent you from using FACTS in future terms until the fees have been paid.

Financial Accounts (plan level):

Agreement Financial Account

Payment Plan Menu

Balance and Payment Details
Financial Account
Make a Payment
Profile
Transaction History

Current Status and Summary

Agreement Number	101 027 875	Remaining Institution Balance	3,100.00
Agreement Status	Active	Remaining FACTS Balance	0.00
Financial Account	Wells Fargo - 1158	Remaining Amount Due	3,100.00

Make a Payment

Financial Account

The HTP School allows automated payments from a checking or savings account. Credit card payments from MasterCard, Discover and American Express are also accepted. Payments made by credit card will be assessed a 2.5% convenience fee.

Current Financial Account

Financial Account Wells Fargo XXXXXXXXXXXXXXX1158 [View Details](#)
Account Status Active

Change/Add Financial Account

- If your school offers credit card as an option, information about the types of credit card you may use and additional fee disclosure is listed.
- 'View Details' gives you more information about the account listed, such as routing number and account type.
- Click 'Change/Add Financial Account' to make changes.

Financial Account

Change Financial Account

Financial Account*

-- Select --
-- Select --
-- Add Credit Card --
-- Add Bank Account --
MasterCard - 5454

You can add a new bank account or credit card (if offered), or select from an existing account.

Financial Account

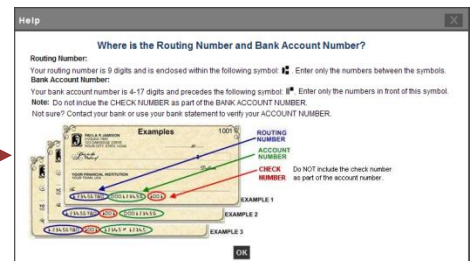
Bank Account

Please enter your name exactly as it appears on your Bank Account.

Account Holder Name*
Bank Name*
Account Type* -- Select --
Routing Number*
Account Number*

Cancel

Add



- Enter the information requested for the type of account you are adding.
- Click the help links (?) if you need assistance finding the routing number or account number on your check.

Financial Account

Authorization

As the Responsible Party on this Agreement, I guarantee that I am an authorized signer on the account provided. I authorize FACTS to initiate debit or charge entries to the account provided, or any subsequent account, and to debit or charge the same to such account.

Cancel

Save

- Use the checkbox to verify that you are a signer on the account provided and authorize debits to this account.

Make a Payment:

Make a Payment

Payment Plan Menu
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Profile
Transaction History

Make a Payment

[View Payment History](#)

Agreement Information

Agreement Number: 101 027 875

Student(s): Ashley Grimes

Remaining Balance

View Details	Future Scheduled Payments	3,100.00
	Total	3,100.00

Enter Payment Amount

Please enter the amount that you would like to pay today.

Payment Amount

[Next](#) [Cancel](#)

- **View Payment History** – Navigates you to the Transaction History screen.
- **Agreement Information** – Shows which agreement and student you are looking at.
- **Remaining Balance** – Shows amount that is past due and scheduled in the future. ‘View Details’ will let you see which payments are included in either the past due or future payments. You will be able to expand and see the details of those payments. *Past due amounts must be paid before any funds can be applied to future payments.*
- **Enter Payment Amount** – This is where you will enter the amount you are paying **TODAY**. *Online payments are posted immediately and cannot be stopped once submitted.*

Make a Payment

Payment Plan Menu
Balance and Payment Details
Financial Account
Make a Payment
Profile
Transaction History

Make a Payment

Select Payment Application - Apply to next scheduled payment(s)

You have \$100.00 to apply to Future Scheduled Payments. Please select the option that best meets your needs.

Apply to next scheduled payment(s)

Apply to end of payment schedule

Apply to all remaining scheduled payments

Apply to a specific student, account or payment

Scheduled Date	Current Scheduled Amount	Payment Application	New Scheduled Amount
July 16, 2012	372.73	-100.00	272.73
August 15, 2012	272.73	0.00	272.73
September 17, 2012	272.73	0.00	272.73
October 15, 2012	272.73	0.00	272.73
November 15, 2012	272.73	0.00	272.73
December 17, 2012	272.73	0.00	272.73
January 15, 2013	272.73	0.00	272.73
February 15, 2013	272.73	0.00	272.73
March 15, 2013	272.73	0.00	272.73
April 15, 2013	272.73	0.00	272.73
May 15, 2013	272.70	0.00	272.70
Total	3,100.00	-100.00	3,000.00

[Previous](#) [Next](#) [Cancel](#)

- **Select Payment Application**

- **Apply to next scheduled payment(s)** – payment will apply to the first scheduled payment(s) until the amount is spent.
- **Apply to end of payment schedule** – payment will apply to the last scheduled payment(s) until the amount is spent.
- **Apply to all remaining scheduled payments** – payment will apply equally to all scheduled payments.
- **Apply to a specific student, account or payment** – you will have the option to direct where the payment will be applied depending on how your balances are configured (by family or student, by sub account).

Example of ‘Apply to a specific student, account or payment’:

Make a Payment				
Scheduled Date	Name	Account	Amount Due	Payment Amount
July 16, 2012				
	Ashley Grimes	Activity Fee	100.00	<input type="text"/>
	Ashley Grimes	Tuition	272.73	<input type="text"/>
			<hr/> 372.73	
<hr/>				
August 15, 2012				
	Ashley Grimes	Tuition	272.73	<input type="text"/>
			<hr/> 272.73	
		Amount to apply toward future scheduled payments		100.00
		Total Payment Amount		0.00
		Remaining Amount to Apply		100.00

- The breakdown of each payment is listed. Notice the scroll bar to the right – this allows you to scroll through the remaining payments and select where to apply the payment amount.

Select Payment Method

Payment Submitted On: 11/9/2011
 Payment Method*:

You are able to add a new account or select from an existing account. This will not change your primary account for automatic payments.

Terms & Conditions

Terms & Conditions of Payment

By selecting the checkbox below, you agree to these terms and conditions, authenticate your identity, and authorize your payment and any changes to the payment schedule as a result of this payment.

I, Brenda Grimes, guarantee that I am an authorized signer on the account provided. I agree to be bound by the payment terms and conditions and authorize FACTS Management Company to process the above payment from my account.

If this payment returns, your automatic payments will attempt as previously scheduled. If any automatic payment date passes in the meantime, such payment(s) will be processed IMMEDIATELY following the return. Payments will be processed to the primary financial account on your payment plan.

I accept the Terms & Conditions for this payment

- Your next step is to choose how you will pay, then accept the terms & conditions and click ‘Pay’.

Profile (plan level):

Agreement Profile

Payment Plan Menu	Current Status and Summary			
Balance and Payment Details	Agreement Number	101 027 875	Remaining Institution Balance	3,100.00
Financial Account	Agreement Status	Active	Remaining FACTS Balance	0.00
Make a Payment	Financial Account	Wells Fargo - 1158	Remaining Amount Due	3,100.00
Profile	Update Financial Account			Make a Payment
Transaction History				

Profile

[Student Information](#) | [E-mail Alerts and Notification Settings](#) | [Authorized Party Information](#)

Student Information

Name	Ashley Grimes
Grade	1st

Student Information – lists any students associated with this specific plan

Profile

[Student Information](#) | [E-mail Alerts and Notification Settings](#) | [Authorized Party Information](#) [Edit](#)

Delivery Preference

Customer Correspondence Method: Postal Mail: 1248 Apple St.

E-mail Alerts

Yes, send me payment reminder e-mails.

Email Alerts and Notification Settings

- **Delivery Preference** – you can choose to receive correspondence from FACTS either by postal mail or email.
- **E-mail Alerts** – customers with automatic payment plans may opt to receive email reminders of upcoming debits. These reminders are sent 4 business days prior to the due date. You must provide an email address to receive the notices.

Authorized Party Information

Profile

[Student Information](#) | [E-mail Alerts and Notification Settings](#) | [Authorized Party Information](#)

Additional Authorized Party

[What is an Additional Authorized Party?](#)

Name	Authorization	
Frank Grimes	Authorized	Edit

- You may authorize another person to call us about your FACTS account and make changes on your behalf. You agree that the Additional Authorized Party may take any action with reference to your FACTS account as could be taken by you, except changing the name of the Additional Authorized Party or changing authentication information.
- **Edit** – this link allows you to mark a listed party as 'Authorized' or 'Unauthorized' at the plan level. To add or remove an Additional Authorized Party to your consumer account, select the Authorized Party tab from the Dashboard.

Transaction History:

[Home](#)
[Dashboard](#)
[Profile](#)
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[Notices](#)
[Sign Out](#)

Agreement Transaction History

Payment Plan Menu

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Current Status and Summary

Agreement Number	101 027 875	Remaining Institution Balance	3,100.00
Agreement Status	Active	Remaining FACTS Balance	0.00
Financial Account	Wells Fargo - 1158	Remaining Amount Due	3,100.00

[Update Financial Account](#)
[Make a Payment](#)
[Print](#)

History

[Expand All](#) | [Collapse All](#)

Effective Date	Transaction Type	Description	Reference Date	Total Amount	FACTS Amount	Institution Amount	Remaining Institution Balance
08/16/2011	1st Return	Returned Payment Fee - NSF - Unresolved	08/05/2011 (1)		30.00		1,567.00
08/15/2011	1st Attempt	Returned Payment Fee	08/05/2011 (1)		-30.00		1,567.00
08/08/2011	Correspondence	Payment Returned Notice	08/08/2011				1,567.00
08/08/2011	Charge	Returned Payment Fee	08/05/2011 (1)		30.00		1,567.00
⊕ 08/08/2011	1st Return	Payment - NSF	08/05/2011			156.70	1,567.00
⊕ 08/05/2011	1st Attempt	Payment	08/05/2011			-156.70	1,410.30
08/01/2011	Correspondence	Payment Reminder Notice	08/01/2011				1,567.00
07/15/2011	Correspondence	Agreement Confirmation Notice	07/15/2011				1,567.00
⊕ 07/15/2011	Online	Agreement 	07/15/2011			1,567.00	1,567.00
07/14/2011	Online	Agreement Setup Confirmation Page	07/14/2011				1,567.00

The Transaction History is displayed newest to oldest from top to bottom. Returns are posted in red.

Columns

Effective Date - date activity actually occurred

Transaction Type – type of activity that occurred

Description – detail of the transaction

Reference Date – scheduled date of activity

- The Effective Date and Reference Date may differ due to a payment falling on a non-banking day. In addition, when a payment fails and is reattempted, the Reference Date will maintain the original payment date.

Total Amount – will display if the item includes both FACTS and institution charges

FACTS Amount – lists only amounts owed to FACTS

Institution Amount – lists only amounts owed to the school

Remaining Institution Amount – running balance of total amount owed to school for this plan

⊕ The plus sign next to the left of an item allows you to expand the view for a breakdown of charges (by family or student and/or by sub account depending on how your school provided the information).

 The magnifying glass in the Description column allows you to see the impact of a change or the set up of your schedule.

 The paper clip to the right of an item indicates correspondence that was sent from FACTS.

Profile (User Account):

Home Dashboard **Profile** Financial Accounts Notices Sign Out

My Profile

My Profile

Demographics Security Edit

Online Account Information

User Name	brendagrimes
Password	XXXXXXXXXXXX Change
Security Question	What was the color of your first car? Change

Telephone Identification Questions

Please select two Telephone ID questions and provide answers below. These questions will be used by FACTS/NBS customer service to validate your identity when you make inquiries by telephone.

Telephone ID Question 1*	What is the first name of your favorite aunt?
Question 1 Answer*	aunt
Telephone ID Question 2*	What is the first name of your favorite uncle?
Question 2 Answer*	uncle

- **Demographics** - This screen is another place you can edit your personal information (address, phone, email)
- **Security** – The information on this screen is in regard to your User Account.
 - **Online Account Information** - You may change your Password and Security Question in this section.
 - **Telephone Identification Questions** – Select the 'Edit' link to change the questions and/or answers. These questions are used to authenticate your identity when calling FACTS to inquire about your account.

Financial Accounts (User Account):

Home Dashboard Profile **Financial Accounts** Notices Sign Out

Financial Accounts

The following financial account information is available with us. + Add Financial Account

Wells Fargo Brenda Grimes Checking Account Routing # 104000058 Account # XXXXXXXXXXXXXXX1158 Edit Editing is not supported on this account, please add a new financial account	Used By Pending - The HTP School Agreement # 101 027 875	Remaining Balance \$3,100.00 Change
MasterCard Brenda Grimes Credit Card # XXXXXXXXXXXXXXX5454 Exp: January 2014 Edit The 'Edit' function is only available for credit card accounts so that you may update the expiration date and/or billing address.	Used By	Remaining Balance Remove Only accounts that are not in use may be removed.

When you click the 'Change' button, you will be navigated to the plan listed to the left.

The financial accounts you have added to any of your plans with FACTS are listed at the customer level. Under 'Used By' you will see which plans are using the account listed, if any.

Click the 'Add Financial Account' button to provide new account information. This will NOT change the account on any payment or billing plans, it simply adds it to your available accounts.