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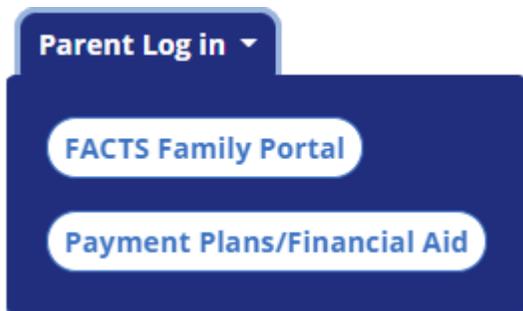
## Accessing the Financial Management System

For schools using Premier Integration, Customers and Authorized Parties will access the Financial Management system via the Financial area of their Family Portal. The options available depend on the features in use by the school, as well as the actions available to the user.

This article provides a sample of a typical process, but the appearance will vary based on how the school is configured. The images displayed may not match what your customers see, but the experience should be similar.

### Logging into Family Portal

Customers and Authorized Parties can log into the Family Portal by navigating to [www.factsmgt.com](http://www.factsmgt.com) and clicking **FACTS Family Portal** under the **Family Log in** menu. Even if the user wants to view Payment Plans or Financial Aid information, they must click FACTS Family Portal to log in.



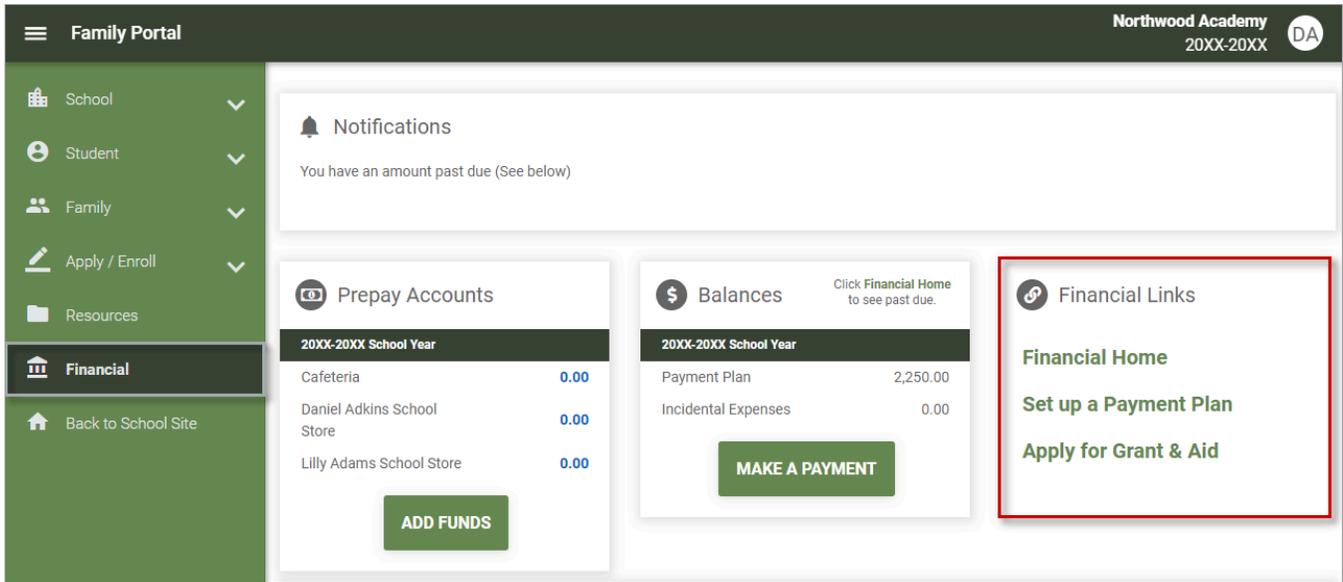
### Passing into FACTS Financial Management

Customers and Authorized Parties will pass over to the Financial Management system by clicking one of the links listed in the **Financial Links** area. The links that appear may vary depending on what options the school offers and where the user is in various processes. The **Financial Home** link will always appear, though. This will take them to the home page of the Financial Management system.



**Tip**

If the Set up a Payment Plan or Apply for Grant & Aid links are not showing for your families, check that your school configuration has these features turned on. For more information, see [Manage Family Portal Configuration Options](#).



## Returning to Family Portal

If the user clicks a link or button that is an action, such as 'Make a Payment' or 'Set up a Payment Plan', the user should be returned to the Family Portal when the task is complete.

If the user is on the Financial Home screen, they can return to the Family Portal by clicking the **Return** or **Sign Out** icon at the top right corner of their page.



Hello Daniel

Click the arrow to return to the family portal.



Payment Plan & Billing

View Details

Daniel Adkins #5001732675  
For Daniel Adkins and Lilly Adams

Current Balance  
**\$2,321.00**

Make a Payment

20XX-20XX SCHOOL YEAR	AMOUNT DUE
Payment Plan (101 141 770) <a href="#">Actions</a>	<b>\$2,250.00</b>
Plan owned by Daniel Adkins	

20XX-20XX SCHOOL YEAR	AMOUNT DUE
Incidental Expenses <a href="#">Actions</a>	<b>\$58.00</b>

**Past Due** - There is a past due balance of \$58.00.

[Make a Payment](#)



Prepay Accounts

View Details

Daniel Adkins #5001732675  
For Daniel Adkins and Lilly Adams

Add Funds

20XX-20XX SCHOOL YEAR	BALANCE
After Care - Daniel Adkins	<b>\$0.00</b>
Cafeteria - Daniel Adkins	<b>\$0.00</b>
School Store - Daniel Adkins	<b>\$0.00</b>
School Store - Lilly Adams	<b>\$0.00</b>



Daniel Adkins



test@email.com



Register to receive text services on your mobile phone.



Wells - 5454



Sarah Adkins is an Authorized Party on your account.