

Instructions for parents to access/navigate their FACTS account

Following are instructions for accessing and navigating your FACTS account. Most of your questions should be answered by logging into your account and reviewing the transactions.

1. Go to: <https://online.factsmgt.com/signin/3WFLJ>
2. Select Sign in
3. If you have forgotten your username or password, select the option Forgot Username/Password
4. Once logged into your account, select the blue View Details in the Payment Plan and Billing box.
5. On the far right of this screen, it will give you the option to select the school year (term).
6. The Schedule tab will tell you when your drafts are scheduled and by selecting the down arrow on each draft you can see what is included in that draft.
7. The Transaction tab shows all of the activity on your account.
 1. Across the top you can filter the list by date, student or account type or leave the defaults.
 2. The Transaction Type column tells you what type of transaction was added for the date on the row. You can click on the blue in that column to bring up details of the transaction. If it is a Charge or Credit the detail will explain why the charge/credit was added in the Reason and/or the Description on the specific transaction.
8. The Balances tab shows you the balance on each of your children and by selecting the down arrow on each child you can see what is included in the total.
9. The Payments Made tab shows you a list of the payments you have made to date and by selecting the down arrow on each payment you can see what is included in that payment .
10. The Changes tab shows you any changes that have been made on your account.

Number 7 above is where you will likely find most of your questions answered.

All families have a FACTS account. If you did not set up your account, select the Forgot Username/Password option to enter you email address. If this does not work for you, send an email to our Business Manager, Norma Miller, at nmiller@cdlex.org and we will let you know what email address is set up on your account so that you can access your account.