

Customer Experience: Payer First Online Payment Plan Setup

Institution Link

The customers will access FACTS by clicking on the FACTS icon in the banner of the MCC website (melbournecc.org).



The system will ask for an email verification. This is looking for existing user accounts for the customer. If no accounts are found, the customer will click **Create a new FACTS account**.

Create Account

Please enter your e-mail address.

E-mail Address*

Next

Cancel

[Do not have an e-mail address?](#)

Create Account

Welcome! Thank you for using FACTS.

Please take a few moments to create a user account.

Create a new FACTS account

[Already have an account with FACTS?](#)

Contact Info

The customer will be asked to provide their name, address, phone number and email.

Create Account

[Return to Sign In Page](#)

Contact Info

Name

Prefix	<input type="text" value="-- None --"/>
First Name*	<input type="text"/>
Middle Name	<input type="text"/>
Last Name*	<input type="text"/>
Suffix	<input type="text" value="-- None --"/>

Address

Country*	<input type="text" value="-- Select --"/>
Address Line 1	<input type="text" value="Street Address, PO Box, Company Name, c/o"/>
Address Line 2	<input type="text" value="Apartment, Suite, Unit, Building, Floor, etc."/> Add
City	<input type="text"/>
State/Province/Region	<input type="text"/>
ZIP/Postal Code	<input type="text"/>

E-mail

E-mail 1*	<input type="text"/>
E-mail 2	<input type="text"/>
E-mail 3	<input type="text"/>

All correspondence will be sent via e-mail only
Correspondence will be sent to all e-mails provided

Phone Numbers

At least one phone number is required.

Daytime Phone	<input type="text" value="US"/> (<input type="text"/>) <input type="text"/> - <input type="text"/> Ext. <input type="text"/>
Evening Phone	<input type="text" value="US"/> (<input type="text"/>) <input type="text"/> - <input type="text"/> Ext. <input type="text"/>
Mobile Phone	<input type="text" value="US"/> (<input type="text"/>) <input type="text"/> - <input type="text"/>

To provide you the best customer service possible, FACTS may contact you by any phone number associated with you, including cellular and mobile numbers. We may also contact you using automatic dialing systems, artificial or pre-recorded messages, text messages, or e-mails. By clicking 'Next' below, you agree to such contact related to your account.

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

Online Account Profile

The customer will enter a username and password. They will also select three predefined security questions and provide answers.

Create Account

Online Account Profile

Username and Password

Username*	<input type="text"/>
Password*	<input type="password"/>
Re-Enter Password*	<input type="password"/>

- Do not include spaces in your username or password
- You may use your e-mail address for your username
- Passwords must contain at least 8 characters
- Passwords must contain at least one letter and one number
- Passwords are case sensitive

Security Questions

Password Reset Question*	-- Select --	?
Password Reset Answer*	<input type="text"/>	
Telephone ID Question 1*	-- Select --	?
Question 1 Answer*	<input type="text"/>	
Telephone ID Question 2*	-- Select --	?
Question 2 Answer*	<input type="text"/>	

Help

The security question and answer will be used for identification if you have forgotten your password. For your security, the answer to this question cannot be viewed by anyone.

Help

The telephone ID questions are used by FACTS/NBS customer service to validate your identity when you make inquiries by telephone.

Submit

Cancel

Dashboard

From the dashboard, the customer will click **Set up a Payment Plan**.





Hello Test


 **Payment Plan & Billing** [View Details](#)


Test Customer #1000640654
For Test Student1 and Test Student2

[Set up a Payment Plan](#)

 **Test Customer**

 mytestaccount@factsmgt.com

 [Register to receive text alerts on your mobile phone.](#)

 Want to allow a friend or family member to pay toward your balance?
[Add an Authorized Party.](#)

Have another account you want to link?

Welcome

The text on this screen can be customized by the institution.

- Text size and color can be modified
- Keep the message brief
- Include contact information for questions

When multiple terms are active, the customer must select one before the 'Begin' button will be accessible.

From this point forward, the customer has access to **Live Help** via our chat feature on the top right corner of the screen. This option is available Monday-Friday from 8-5 Central Time.

Sample Institution 2016-2017 [LIVE HELP](#)

Please select a term

- 2015-2016
- 2016-2017

Welcome [Want to designate another payer?](#) ?

Sample Institution is pleased to offer you a convenient, online method to enroll in a payment plan with FACTS.

If you have any questions, please contact Sample Institution at 402-466-1063 or FACTS Management at 866-441-4637.

[Begin](#) | [Cancel](#)

Contact Information

The customer will have the opportunity to review their personal information and make changes as needed. In addition, the customer can update their correspondence preference.

Sample Institution 2016-2017 [LIVE HELP](#)

Progress Tracker

Contact Information | Students | Plan Options | Payment Details | Payment Schedule | Review | Thank You

Contact Information

Family Information

Name	Test Customer 123 Main Lincoln, NE 68516 United States (555)555-5555	Edit
E-mail Addresses	mytestaccount@factsmgt.com <input checked="" type="checkbox"/> Please send me e-mail payment reminders Details <input checked="" type="checkbox"/> Use e-mail for correspondence E-mail correspondence will be sent to all e-mail addresses provided	

To provide you the best customer service possible, FACTS may contact you by any phone number associated with you, including cellular and mobile numbers. We may also contact you using automatic dialing systems, artificial or pre-recorded messages, text messages, or e-mails.

[Back](#) | [Next](#) | [Save & Exit](#) | [Cancel](#)

Students

- Click **Add Student**

Progress Tracker



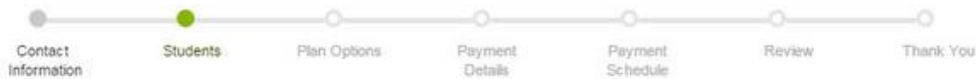
Students

Student First Name	Student Last Name			
No records found				
				Add Student

Back | Next | Save & Exit | Cancel

- Enter:
 - Student First and Last Name
 - Grade Level
 - Student ID (if used by institution)
- Click **Save**
Custom text may be added to the Add Student screen.

Progress Tracker



Students

Student First Name	Student Last Name			
No records found				
				Add Student

Add Student

Please enter the information for **EACH** student included in this payment plan.

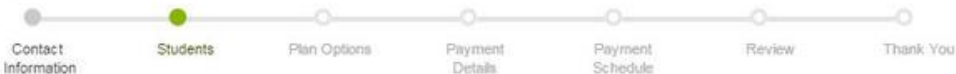
After you have submitted your agreement, Sample Institution will input your balance and finalize the payment plan.

Student ID	<input type="text"/>
Student First Name*	<input type="text"/>
Student Last Name*	<input type="text"/>
Grade Level*	-- Select --

Save | Cancel

To enter additional student information, click **Add Student** again. When finished, click **Next**.

Progress Tracker



Students

Student First Name	Student Last Name	Student ID	Grade Level	
Test	Student1	ABC123	1st	Edit Remove
Test	Student2	ABC456	5th	Edit Remove
				Add Student

[Back](#) [Next](#) | [Save & Exit](#) [Cancel](#)

Payment Plan Options

- Use the **Show:** drop down menu to limit the plans displayed
- Select a payment plan
 - When a fee or discount is applied for a specific payment plan, it is displayed under the plan name
 - If custom text was added to a payment plan, it is displayed under the plan name
 - When a down payment is required, the link will show more information about what may be included in the amount
- Click **Next**
- A warning will be displayed to remind the customer that there is a FACTS Enrollment Fee for the plan selected (if applicable)

Progress Tracker



Payment Plan Options

Select a payment schedule

Show: All Items Selected

Pay in Full

Sample Institution has a 5.00% discount for this payment schedule.

Select	Payment Method	Number of Payments	Beginning Month	Available Payment Days	Last Day to Enroll	Enrollment Fee
<input checked="" type="radio"/>	Automatic Payments from <ul style="list-style-type: none"> • Checking / Savings • Credit Card 	1	July 2016	5th	06/23/2016	\$

Monthly Payments

Select	Payment Method	Down Payment	Number of Payments	Beginning Month	Available Payment Days	Last Day to Enroll	Enrollment Fee
<input checked="" type="radio"/>	Automatic Payments from <ul style="list-style-type: none"> • Checking / Savings • Credit Card 	Required	11	June 2016	5th 10th 20th 25th	05/24/2016 05/27/2016 06/08/2016 06/13/2016	\$

Monthly Invoices

Please Note: (Custom Message) There is an additional \$100 fee for choosing to receive invoices for payment. If you do not want to pay this fee, you will need to select an automatic payment option. This fee will not be waived.

There is a \$100.00 Sample Institution fee for this payment schedule.

Select	Payment Method	Number of Payments	Beginning Month	Available Payment Days	Last Day to Enroll	Enrollment Fee
<input checked="" type="radio"/>	Automatic Payments from <ul style="list-style-type: none"> • Checking / Savings • Credit Card 	11	June 2016	5th 20th	05/24/2016 06/08/2016	\$
<input type="radio"/>	Invoice	11	June 2016	5th 20th	05/11/2016 05/26/2016	\$

Semi-Annual

Select	Payment Method	Number of Payments	Payment Months	Available Payment Days	Last Day to Enroll	Enrollment Fee
<input checked="" type="radio"/>	Automatic Payments from <ul style="list-style-type: none"> • Checking / Savings • Credit Card 	2	July 2016 January 2017	5th 10th 20th 25th	06/23/2016 06/28/2016 07/07/2016 07/13/2016	\$

|

Enrollment Fee ✕

There is a nonrefundable enrollment fee to participate in the option you selected.

|

Down Pay Details

Scheduled Down Payment Details

Amount	Account	
\$100.00	Activity Fee	This amount is per student.

OK

Payment Details

The options available are dependent on the payment methods your institution offers. A warning box may appear if you are offering a credit card program where the customer may pay additional fees.

The person listed as the Plan Owner must be a signer on the financial account provided.

Sample Institution 2016-2017

Progress Tracker

Contact Information Students Plan Options **Payment Details** Payment Schedule Review Thank You

Payment Details

Please enter your primary financial account for payments

Pay Using ?

- Select --
- Add Bank Account --
- Add Credit Card --

A service fee may be assessed for payments made by credit card. The service fee amount will be disclosed once you select a payment method. Select your payment method to continue.

This warning box is only displayed when offering a credit card option where the customer may pay additional fees.

Back Next | Cancel

Add Bank Account

Sample Institution

2016-2017

LIVE HELP

Progress Tracker



← Add Account

Bank Account

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

Account Holder Name*

Bank Name*

Account Type*

Routing Number* ?

Account Number* ?

Save

Cancel

Add Credit Card

Progress Tracker



← Add Account

Credit Card Details

Please enter your name exactly as it appears on your Credit Card.

Account Holder Name*	<input type="text"/>
Card Number*	<input type="text"/>
Card Brand*	-- Select --
Expiration Date*	-- Select -- / -- Select --

Billing Address

Please enter the address as it appears on your billing statement.

Country*	United States
Address Line 1*	121 Main St
Address Line 2	Apartment, Suite, Unit, Building, Floor, etc. Add
City*	Lincoln
State*	Nebraska
ZIP/Postal Code*	68506

[Save](#)[Cancel](#)

Once the financial account has been entered, additional insurance options may be displayed, if applicable.

*If **Incidental Expenses** is offered, information about auto pay is displayed. When auto pay is optional, the customer can deselect the auto pay option.*

Progress Tracker



Payment Details

Please enter your primary financial account for payments

Pay Using Bank of America - 4084 ?

Incidental Expenses

Incidental expenses may be billed separately. If enrolled in auto pay, these payments will be automatically processed from the account above.

Yes, please enroll me in auto pay for incidental expenses

Peace of Mind (POM) Benefit

The POM Benefit will pay any eligible FACTS unpaid balance in the event of the death of the Responsible Party or his/her legal spouse. Coverage is only available to individuals under age 70. The non-refundable fee for this benefit is \$. You will be automatically reenrolled in POM each consecutive year you have a FACTS Payment Plan Agreement.

Yes, please enroll me in the POM benefit

Back

Next

Cancel

Payment Schedule

The customer will select a payment date from the drop down menu. This will populate the future payment schedule below. *If a down payment is required, information about the date of the down payment is disclosed at the bottom of the schedule.*

Progress Tracker



Payment Schedule

What day do you want the future scheduled payments to be on?*

Future Payment Schedule

Payment Date	Description
Monday, June 20, 2016	Payment
Wednesday, July 20, 2016	Payment
Monday, August 22, 2016	Payment
Tuesday, September 20, 2016	Payment
Thursday, October 20, 2016	Payment
Monday, November 21, 2016	Payment
Tuesday, December 20, 2016	Payment
Friday, January 20, 2017	Payment
Monday, February 20, 2017	Payment
Monday, March 20, 2017	Payment
Thursday, April 20, 2017	Payment

The \$ Enrollment Fee will be automatically processed within 14 days of the agreement being finalized by Sample Institution.

There is an Activity Fee payment scheduled for 5/10/2016 for this payment plan. [Click here for details.](#)

[Back](#) [Next](#) | [Cancel](#)

Review & Authorize

- **Change** links allow the user to edit the information entered during payment plan setup
- The customer must check the box to agree to the **Terms & Conditions**
- Clicking **Authorize** completes the set up

Progress Tracker



Thank You

Thank you for completing a FACTS payment plan for Sample Institution. Please print a copy for your records.

Did you know that you can receive text alerts on your mobile phone? [Learn More.](#)

An authorized party can make payments on your behalf. [Want to designate another payer?](#)

Agreement Number

101 030 607

Payment Method

Bank of America - 4084

I have read and accept the terms and conditions of this payment plan
(Signed on 9/23/2015)

Done

Print

Contact Information

Name/Address

Test Customer
123 Main
Lincoln, NE 68516
United States

Phone

(555)555-5555

E-mail

mytestaccount@factsmgt.com

Use e-mail for correspondence

(Invoices/Statements will be also sent via e-mail)

Please send me e-mail payment reminders

Student Summary

Name

Test Student1

Test Student2

Payment Details

Future Payments Scheduled

Bank of America - 4084

Yes, please enroll me in auto pay for incidental expenses

Incidental expenses may be billed separately. If enrolled in auto pay, these payments will be automatically processed from the account above.

Future Payment Schedule

Payment Date	Description
Monday, June 20, 2016	Payment
Wednesday, July 20, 2016	Payment
Monday, August 22, 2016	Payment
Tuesday, September 20, 2016	Payment
Thursday, October 20, 2016	Payment
Monday, November 24, 2016	Payment

User Account

The agreement will appear as **Pending** on the customer dashboard. They will not be able to view any balance information until the agreement has been finalized by the institution.

Hello Test

Payment Plan & Billing [View Details](#)

Test Customer #1000640654
For Test Student1 and Test Student2

Current Balance
\$0.00

2016-2017	AMOUNT DUE
Payment Plan (101 030 607)	\$0.00

Pending

This agreement is waiting to be finalized by the institution. After this agreement is finalized a confirmation notice will be sent from us listing the amount owed and the payment schedule.

Incidental Expenses **\$0.00**

[Set up a Payment Plan](#)

Test Customer

mytestaccount@factsmgt.com

[Register to receive text alerts on your mobile phone.](#)

[Bank of America - 4084](#)

[Want to allow a friend or family member to pay toward your balance?
Add an Authorized Party.](#)

[Have another account you want to link?](#)