



Tuition Management Implementation Milestone Checklist

Use this guide to follow along with your implementation team and ensure a smooth implementation for your school.



Pre-Implementation Planning

Prior to your kickoff call, please take some time to think about the following items:

- Review your school's tuition and delinquency policies.
- What payment plan options and payment dates would you like to offer families (e.g. 10 monthly, quarterly, semi-annual, etc.)?
- Who should have access to the system at your school?
- What charges would you like FACTS to collect (e.g. tuition, books, athletic fees, etc.)?
- Would you like FACTS to collect late fees on your behalf?



Kickoff Call

To begin implementation, your FACTS representatives will schedule phone calls to review important items.

- Kickoff call with your client services manager (CSM) to review the Professional Services Agreement and discuss the implementation process.
- If your school is using Advanced Accounting, you'll also need a kickoff call with your account operations specialist (AOS) to review some basic accounting questions and discuss your general ledger code mapping.



Configuration

Based on the information gathered in the kickoff call(s), your CSM will create your web-based platform and configure the system based on the features you selected. A dedicated implementation specialist (IS) will be assigned to your school to guide you through evaluation and training.



Evaluation & Testing

Once your payment plan options are configured in the system, your school will need to review the payment plan sign-up process in "evaluation mode" to see what your families will see when enrolling in a payment plan.

- Review payment plan sign-up link in evaluation mode.
- Provide edits and/or approval to your IS.

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Go Live

After reviewing and approving your payment plan sign-up process for families, your school's payment plan enrollment link will be made live and you can begin notifying families about FACTS.

- Information and customized links or invites will be provided by your IS to allow families to sign up for a payment plan.
- Use these [sample letters](#) to notify families about FACTS.



Training

Depending on the options your school has chosen, you'll need to complete web-based training with your IS to ensure you're comfortable navigating the system.

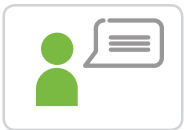
- Payment Plan Finalization Training
- FACTS System Training
- Advanced Accounting Reports Training (if applicable)
- Incidental Billing Training (if applicable)
- Prepay Accounts Training (if applicable)
- Any additional product trainings (as needed)



Parent Action

Families can now begin signing up for payment plans.

- Promote payment plan sign up by using the materials in the [marketing kit](#).



Account Management

A dedicated account manager or account management team is assigned to provide guidance to your school during the year.