

# Action Steps Checklist



## Print & Collaborate With Your Team

Accurate tracking, clear communication, and audit readiness are critical when managing school choice funding at your school. This checklist outlines key steps to help your business office stay compliant, organized, and proactive.

- Configure FACTS Tuition Management to track and report school choice payments with unique billing codes.
- Create a shared reconciliation and audit calendar aligned with disbursement timelines.
- Meet regularly with admissions and financial aid teams to align on enrollment changes and funding eligibility updates.
- Provide clear balance statements to families that show payment source and balances, especially when multiple funding streams are involved.
- Review and update your financial forecast at least annually based on school choice participation levels.
- Prepare for audits by storing all required documentation and payment records within a tuition management system, minimizing reliance on external spreadsheets.
- Stay current on your state's audit protocols and confirm your tuition management system is aligned for compliance.

## Notes

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