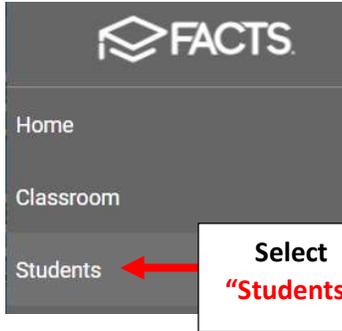


Entering a New Student in FACTS SIS

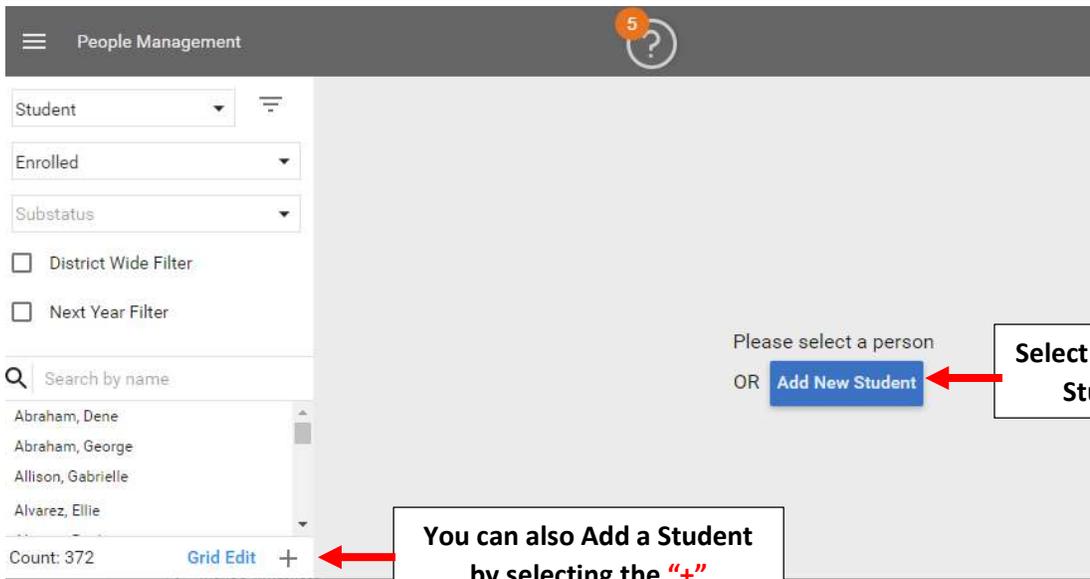
Once logged into FACTS please select **“Students”** from the Left Side Menu



Select
“Students”

You can **“Add a Student”**
by selecting the **“+”**

Select **“Add New Student”** in the Center of the Screen. You can also Add a Student by selecting the **“+”** at the Bottom of the Screen



Select Add New
Student

You can also Add a Student
by selecting the **“+”**

Step 1: Enter Student Name, select Status and Grade from Dropdown, enter Student’s Date of Birth and select Gender from Dropdown. Select “Add New Address”

A screenshot of the 'Add Student' form in FACTS SIS. On the left, there is a vertical navigation menu with five items: '1 Students Required', '2 Family Required', '3 Relationships Required', '4 Finance Required', and '5 Preferences Optional'. The 'Add Student' form is open and contains the following fields: 'First name *' with the value 'John', 'Middle name' with the value 'R', 'Last name *' with the value 'Doe' and a 'Suffix' field, 'School *' with a dropdown menu showing 'Premier Academy', 'Status *' with a dropdown menu showing 'Enrolled' and 'Grade Level' with a dropdown menu showing '02', 'DOB *' with a date picker showing '05/04/2018', and 'Gender' with a dropdown menu showing 'Male'. At the bottom of the form, there is a blue link labeled 'Add New Address'. A red arrow points to this link from a white callout box.

Enter Student Name

Select Status and Grade
from Dropdown

Enter Student’s Date of
Birth and select Gender

Select Add New
Address

Enter Student's Address and Home Phone than select "Next"

Please Note: Cell Phone and Email Address are those of the "Student" not their Parent

The screenshot shows a multi-step process on the left: 1 Students (Required), 2 Family (Required), 3 Relationships (Required), 4 Finance (Required), and 5 Preferences (Optional). The main form is titled "Add Student" and contains the following fields: Address (with a close button), Address * (text input with "123 Elm St"), Address Line 2 (text input), City * (text input with "Brooklyn"), State * (dropdown menu with "New York"), Postal Code * (text input with "14615"), Country * (dropdown menu with "United States"), Home Phone (text input with "555-555-5555"), Cell Phone (text input), Email #1 (text input), and Email #2 (text input). At the bottom left is a "Cancel" button, and at the bottom center is a "Next" button. A red arrow points from a box labeled "Enter Student's Address and Home Phone" to the "Address Line 2" field. Another red arrow points from a box labeled "Select 'Next'" to the "Next" button.

Step 2 Family: Select "Add New Family" or if Student has siblings at the school Select "Add Existing Family"

The screenshot shows a dialog box titled "Add Family" with two buttons: "Add New Family" and "Add Existing Family". At the bottom right is a "Cancel" button. A red arrow points from a box labeled "Select Add New Family" to the "Add New Family" button.

Enter "Default Relationship" i.e. Mother, Father, Name and Gender. ***Please Note: One Relative MUST be marked "Financial Responsibility"*** Update Address Information if different from Student and enter Relative's Cell Phone and Email. ****Email address is a Required Field****

Family Name defaults to Relative "Last Name, First Name". Verify Correct School Year is Selected and Select "FACTS Customer" (Primary Relative with Financial Responsibility)

Select "Next"

The image shows a screenshot of a web form titled "DOE, JACOB AND JANE" with several sections and annotations:

- Family Information Section:** Includes fields for "Family Name" (DoE, Jacob and Jane), "FACTS Year" (2020-2021 School Year), and "FACTS Customer" (Jacob Doe). Annotations point to these fields with the text: "Family Name defaults to Parents 'Last Name, First Name'" and "Verify School Year Select 'FACTS Customer' (Primary Relative with Financial Responsibility)".
- Default Relationship Section (Left):** Fields include "Default Relationship" (Father), "Salutation" (Mr.), "First name" (Jacob), "Middle name", "Last name" (DoE), "Suffix", and "Gender" (Male). An annotation points to the "Default Relationship" field with the text: "Enter 'Default Relationship', Relative's Name and Gender".
- Default Relationship Section (Right):** Fields include "Default Relationship" (Mother), "Salutation" (Mrs.), "First name" (Jane), "Middle name", "Last name" (DoE), "Suffix", and "Gender" (Female).
- Financial Responsibility:** A toggle switch is checked. An annotation points to it with the text: "One Relative MUST be marked 'Financial Responsibility'".
- Address Section:** Fields include "Address" (123 Elm St, Brooklyn, NY 14615), "Cell Phone" (555-222-3333), "Email #1" (jacobdoe@email.com), and "Email #2". An annotation points to the "Cell Phone" and "Email #1" fields with the text: "Enter Relative's Cell Phone and Email Address *Email address is Required*".
- Navigation:** At the bottom, there are "Previous" and "Next" buttons. An annotation points to the "Next" button with the text: "Select 'Next'".

Step 3 Relationships: You will need to identify the “Relationship” each individual has to each student. The options available are:

1. **CU - Custody:** legally responsible for the student
2. **CO - Correspondence:** receive emails and mail outs from the school regarding the student
3. **GP - Grandparent:** non-custodial grandparent. It is possible to print mailing labels based on the individuals selected as Grandparent
4. **GR - Grade Related:** report card access via email and Family Portal. Custodial parents may receive report cards through the Communications area if this option is not selected. If printing or emailing report cards from Report Manager, only parents with this option selected will receive report cards
5. **FP - Family Portal:** access to the student's information in Family Portal. The parent must have a Family Portal account

Select a Relationship for each individual. Select “Next”

DOE, JACOB AND JANE

CU = Custody, CO = Correspondence, GP = Grand Parent GR = Grade Related, FP = Family Portal

Individual	Relationship	Student Name	CU	CO	GP	GR	FP
Doe, Jacob	Father	Doe, John	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doe, Jane	Mother	Doe, John	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cancel Previous Next Select “Next”

Select a Relationship for each individual

Select “Next”

Step 4 Finance: This is a summary of who has Financial Responsibility in the Family. Select “Next” to set “Relative Preferences” for Web Directory and **Parent Alert**

JOHN

Student has one financially responsible family. Defaulting to 100% for all accounting systems.
Student has one financially responsible family. Defaulting to 100% for all institution accounts.

Cancel Previous Next Select “Next”

Students Required
Family Required
Relationships Required
4 Finance Required
5 Preferences Optional

Step 5 Preferences: Here you will set **“Display Preferences”** for your Web Directory and Parent Alert. Click on **Toggle** to turn Preferences **“On”** and **“Off”**. Select **“Finish”**, student will now appear in the Student List

The screenshot shows the 'Add a New Student/Family' interface. On the left, a sidebar lists sections: Students (Required), Family (Required), Relationships (Required), Finance (Required), and Preferences (Optional), with the '5' in a circle next to 'Preferences'. The main area displays settings for two students: Doe, Jacob and Doe, Jane. Each student's settings include: Auto Email Progress Report (dropdown set to 'Never'), Block from Donor Sync (toggle off), Web Directory Block (Name, Address, Home Phone, Cell Phone, Email - all toggles on), and Parent Alert (Country Code input field, Home Phone, Cell Phone, Work Phone, Block Text Messaging - all toggles on). A callout box with a red arrow points to the 'Name' toggle in the 'Web Directory Block' section for Jane Doe, with the text: 'Click on Toggle to turn Preferences “On” and “Off”'. At the bottom, a callout box with a red arrow points to the 'Finish' button, with the text: 'Select “Finish”'. Other buttons at the bottom are 'Cancel', 'Previous', and 'Finish'. The top right corner shows 'Premier Academy 2020-2021 | T1' and a user profile 'SU'.