

Family Mapping in FACTS Billing

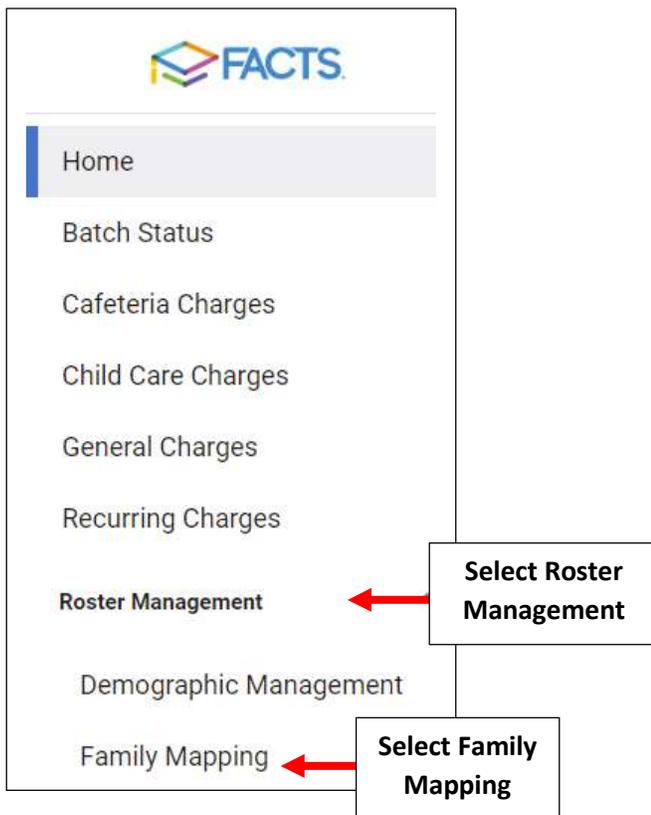
Family Mapping is a four-step process that allows Premier Integration schools to create and manage FACTS Financial Management customers from existing FACTS SIS families.

Navigate to Family Mapping

Select **Billing** from the Main Menu



Select **Roster Management** and then Select **Family Mapping**



This area displays families with **Enrolled Students** that have not been created in Financial Management. In order for a Family to appear on this list and **Map Over Successfully** the following criteria **MUST** be met:

- Accounting Enabled
- Web Enabled
- One or more family individuals are Financially Responsible

****Please Note: If there are families on this list that do not need to be in Financial Management you can remove them from the list by disabling Accounting from Family Options on the Family Dashboard.**

The Family Individual in the FACTS Customer drop-down will become the **Financial Management Customer** and all other Financially Responsible Individuals will become Authorized Parties. Financial Management customers and authorized parties will all have the ability to:

- Receive correspondence from Financial Management
- View balances
- Make payments
- Set up a payment plan



Step 1: Set Up Mapping

1. Select a Financial Term.

The term selected is the term in which a family will be created on the roster in Financial Management. If you are working between school years and enrolling a student for the next year, you will need to select the next year before mapping the family

2. Select a Type of Family or Staff

3. Select the Status for students in the family:

- a. School Enrolled (default)
- b. School Pre-enrolled
- c. District Enrolled
- d. District Pre-enrolled
- e. Admissions

4. Select the families you wish to map and click > (right arrow) to move them to the Selected list or Click >> (double right arrows) to move all families

5. Click **Next**

Step 2: Customer Selection

Please Note the following:

- The system defaults to the **First Financially Responsible Person** as the FACTS Customer. If the FACTS Customer displayed is incorrect, select the correct financially responsible individual from the drop-down list
- When the family is created in Financial Management, other individuals listed will be **Authorized Parties**

1. To assign or correct financial responsibility, click  to navigate to the Family Dashboard to fix, then return to the Family Mapping tab
2. Click Refresh to update the Financial Responsibility column
3. Click Next

Step 3: Preview Mapping

The Preview Mapping screen displays **FACTS SIS Family Names** and the **Customer** who will be **Created** in Financial Management

***If necessary, click Previous to return to the Customer Selection screen to correct customers*

1. Click Map Families to map the new customers in Financial Management. A Confirm Mapping message displays stating the process will create a linked customer in Financial Management
2. Click Continue to create the customers

Step : Review Results

The Review Results screen displays:

- **Mapping Errors:** A list of all customers who were not created in Financial Management, including the reason for the error
- **Mapped Families:** A list of all customers successfully created in Financial Management
- Click **Billing Home** to return to the **Dashboard**
- Click **Map More Families** to return to the **Family Mapping screen**

