Family Mapping for a Paper Application in FACTS SIS

From main menu please select Billing

Select Billing

Select Financial Term Assignment

Select Financial Term Assignment

Select **Next School Year** as Financial Term and Select Status Pre-enrolled. 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

1. Select Financial Term

2. Select Status Pre-enrolled

3. Select Families to Map

4. Click > (right arrow) to move them to the Selected list or Click >> (double right arrows) to move all families

Return to Roster Management and Select Family Mapping

Roster Management ⌃

    Demographic Management

    Family Mapping ← **Select Family Mapping**

    Unsynced Families

    Financial Term Assignment
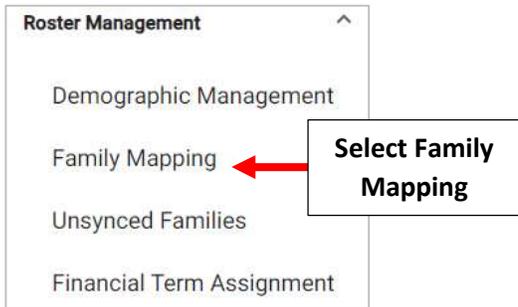
Select a Financial Term and Select the Status School Pre-enrolled
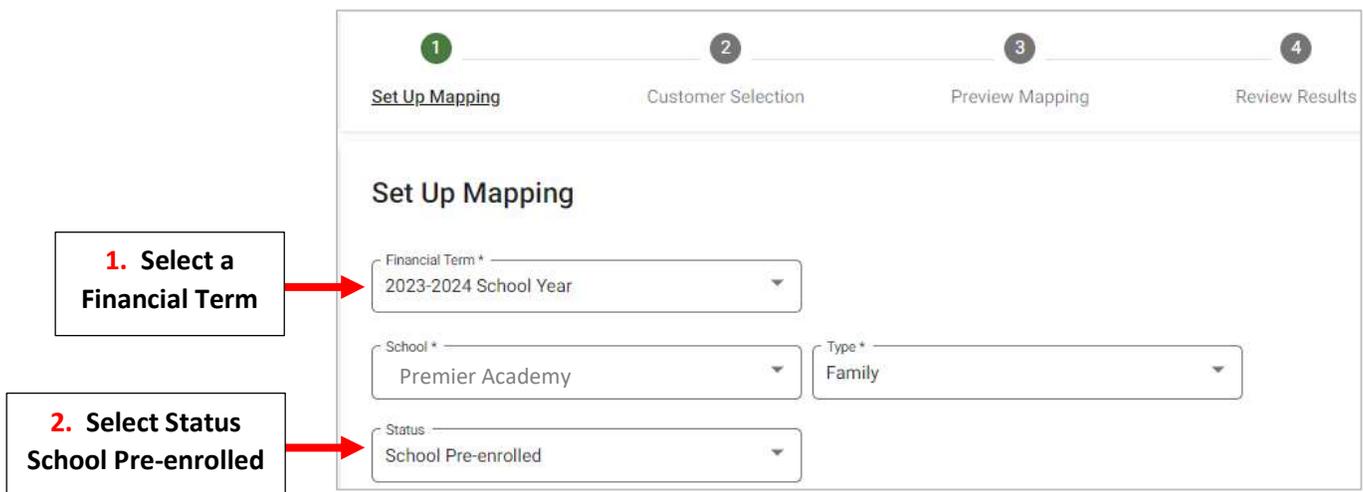
①	②	③	④
Set Up Mapping	Customer Selection	Preview Mapping	Review Results

Set Up Mapping

1. Select a Financial Term →

Financial Term *
2023-2024 School Year ▼

School *
Premier Academy ▼

Type *
Family ▼

2. Select Status School Pre-enrolled →

Status
School Pre-enrolled ▼

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

Available Students
☐ Search students 🔍

1. Select the Families to Map

☑ Jane Doe

☑ Michael Smith

☐ Jacob Black

Selected students *
☐ Search selected 🔍

❯

❯❯

❮

Cancel   **Next** ← **2. Select Next**
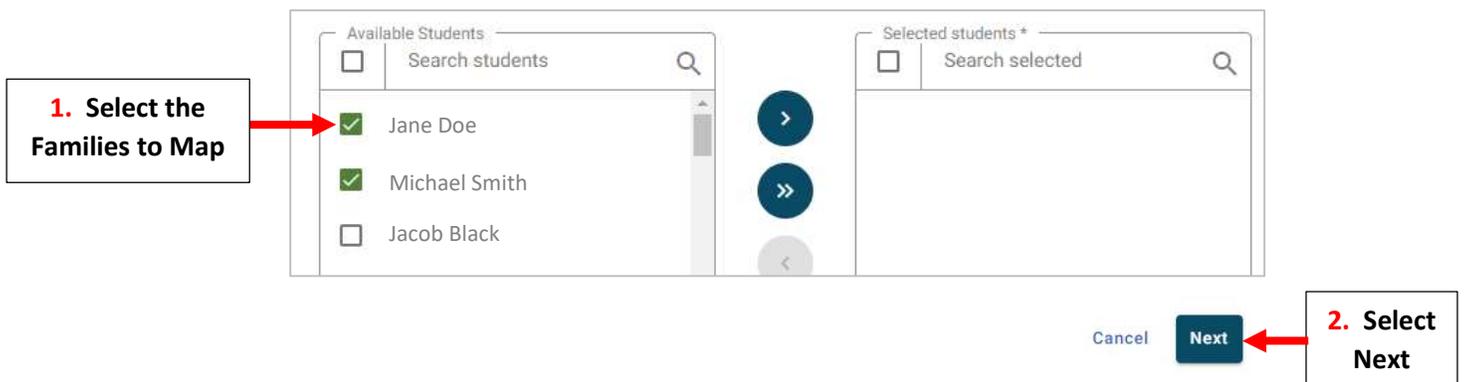
The System Defaults to the **First Financially Responsible Person** as the FACTS Customer.   To Change financial responsibility, **Click** ⬚ to Navigate to the Family Dashboard to fix, then return to the Family Mapping tab. **Click Next**
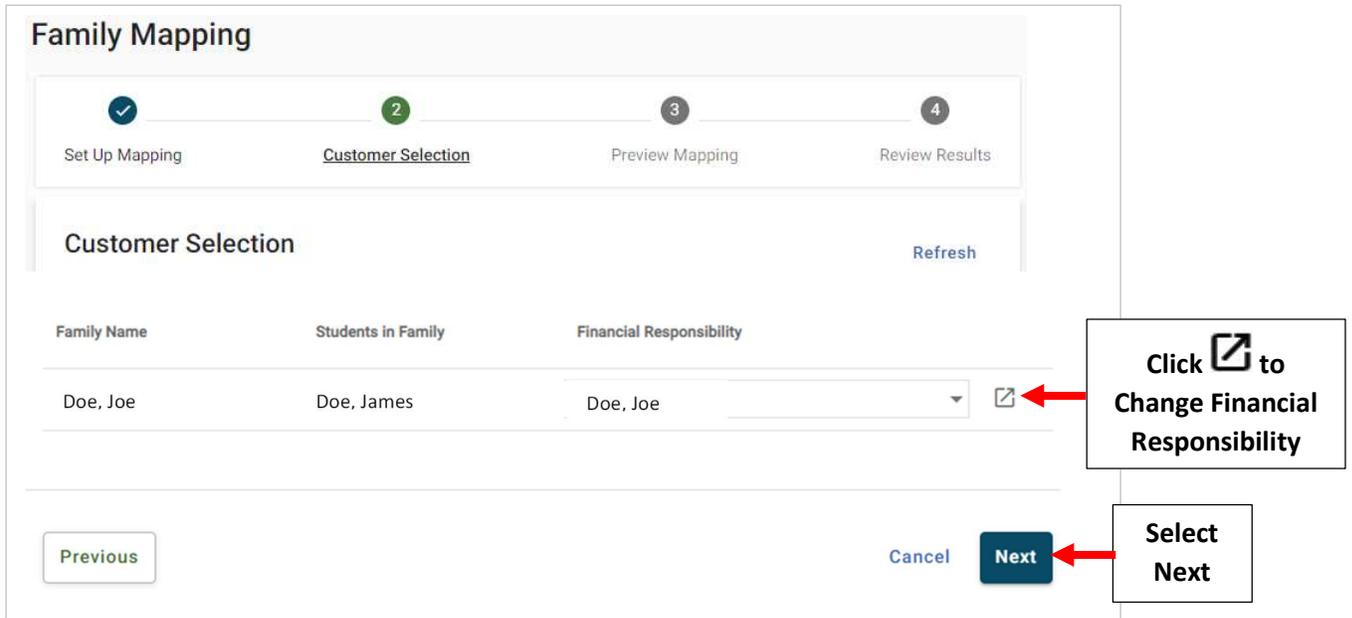
Family Mapping

✓	2	3	4
Set Up Mapping	Customer Selection	Preview Mapping	Review Results

Customer Selection

Refresh

Family Name	Students in Family	Financial Responsibility	
Doe, Joe	Doe, James	Doe, Joe	⬚

Click ⬚ **to Change Financial Responsibility**

Previous   Cancel   **Next**

Select Next

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
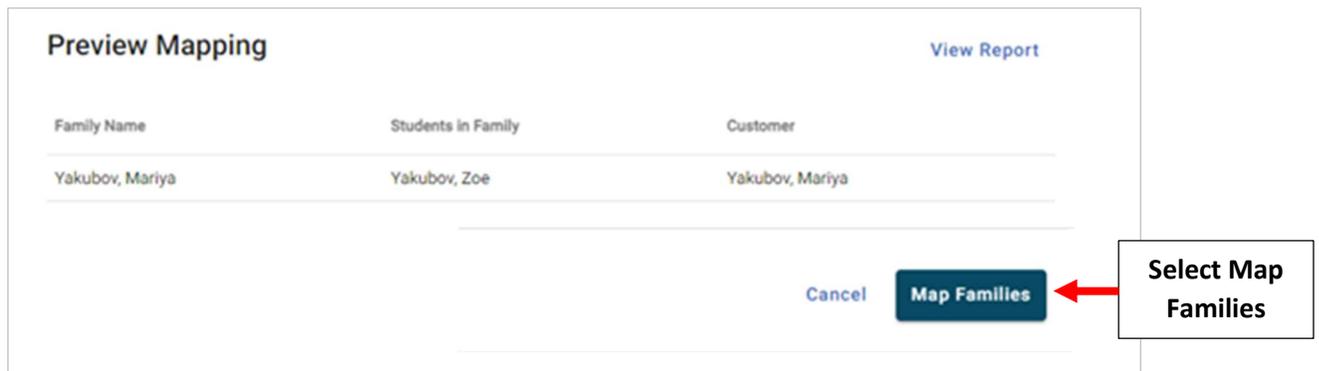
Preview Mapping

View Report

Family Name	Students in Family	Customer
Yakubov, Mariya	Yakubov, Zoe	Yakubov, Mariya

Cancel   **Map Families**

Select Map Families