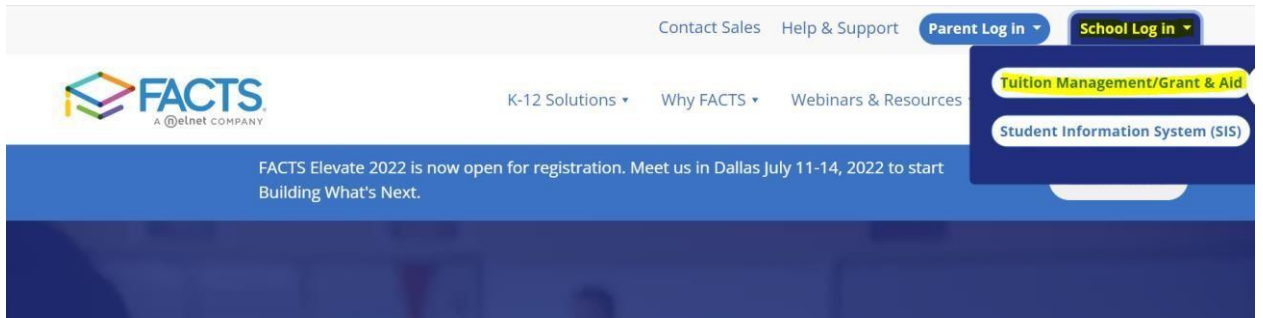
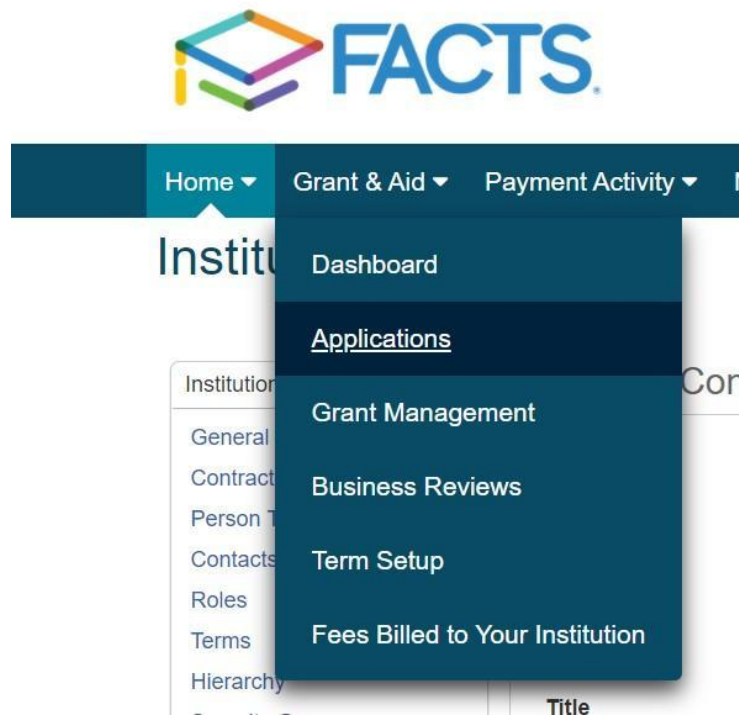


Creating a Custom Report- ACE Contracted Schools

- Go to <https://factsmgt.com/> and in the upper righthand corner click School Login>Tuition Management/Grant and Aid



- In the blue tool bar across the top, hover over Grant and Aid and select 'Applications' in the dropdown list



- To create a custom report to view families who have applied to ACE Scholarships, click the 'New' button.

Applications Institution Summary | Term 2023-2024 School Year

Applications

Standard Reports

- Applicant Status
- Applicant Income
- Applicant Demographic
- Student Status
- Student Income
- Student Demographic
- Student Free & Reduced Lunch
- Custom Student Reports

Edit

New

Delete

Hide Personally Identifiable Information

This includes information such as name, address, email, and phone numbers.

- In Step 2, change the report type to 'Student Report. Then in Step 3, use the search bar to search for specific information you would like included in the report (I.E., Applicant Name or Grade) To insert specific fields into the report, highlight the field and click the arrow pointing to the right

Create Report

Step 1: Create a report or choose an existing report

Create new report Copy this Report

Step 2: Select Data

Choose how you want to view the data

Student report Applicant report

Step 3: Select Fields

Type to search

Available fields Show all Fields

- 2022 Poverty Guideline Percentage
- 2023 Poverty Guideline Percentage
- 2nd Quarter Enrollment Status (Internal)
- ACE Colorado Notes (Internal)
- ACE Denial Reason (Internal)
- Acknowledgement 1 (Custom)
- Acknowledgement 3 (Custom)
- Acknowledgement 2 (Custom)

Selected fields

Student Name

- After you have the report customized to include the information you would like to see, please type 'ACE' into the search box in Step 3. Then select any of the options in the list referencing ACE Acknowledgement and add it to the report as well.

Step 1: Create a report or choose an existing report

Step 2: Select Data

Choose how you want to view the data

Student report
 Applicant report

Step 3: Select Fields

Available fields

ACE Scholarship {Custom}	→	Student Name	↑
Acknowledgement 3 - ACE Scholarships/Cornerstone	←	Grade	↓
Education Scholarship {Custom}	→	Applicant Name	
Applicant Education Level - ACE Scholarships/Cornerstone			
Education Scholarship {Custom}			
Applicants Employment Status - ACE			
Scholarships/Cornerstone Education Scholarship {Custom}			
Co-App Education Level - ACE Scholarships/Cornerstone			
Education Scholarship {Custom}			

38 available fields

3 available fields

- Lastly, in Step 4 create an name for your report and click Save at the bottom of the page

Using your custom report

- To find families who have added ACE to their application, on your report go to the Acknowledgement column and using the filter select 'yes'. This will show you all families who have added ACE to their application and have thus answered the ACE related questions and acknowledgements.

ACE Applicants Fullscreen

Open Column

<input type="checkbox"/>	Student ID ↑↓	Student Name ↑↓	Grade ↑↓	Applicant Name ↑↓	Acknowledgement 3 - ACE Scholarships/Cornerstone Education Scholarship ↑↓
<input type="checkbox"/>			Ch...		1 of 3 selected
<input type="checkbox"/>	10001005925	Gilmore, Rory	07	Gilmore, Rory	<input type="checkbox"/>
<input type="checkbox"/>	10001005522	Nicholas, Jem	11	Nicholas, Jem	<input type="checkbox"/>
<input type="checkbox"/>	10001005521	Nicholas, Scout	12	Nicholas, Scout	<input checked="" type="checkbox"/> Yes
<input type="checkbox"/>	10001005926	Test, Student	02	Applicant Name	<input type="checkbox"/> No <input type="checkbox"/> (Blanks)

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Please reach out to Aly Sylvester with FACTS at 866-412-4637 with any questions!