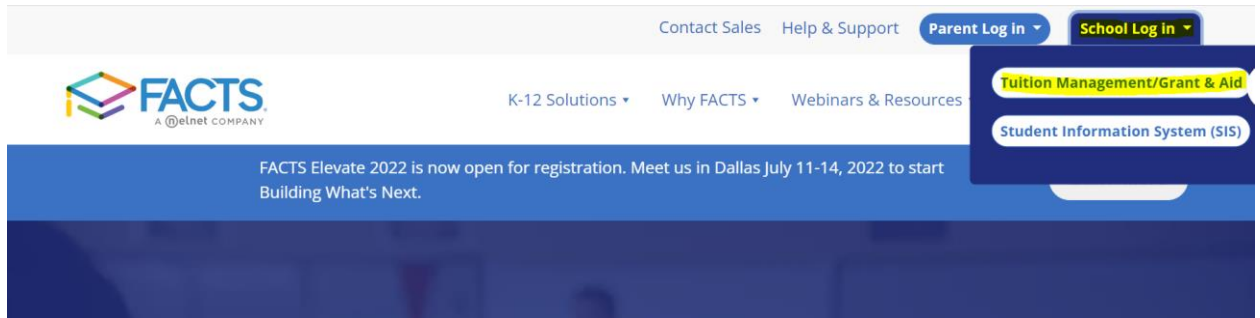
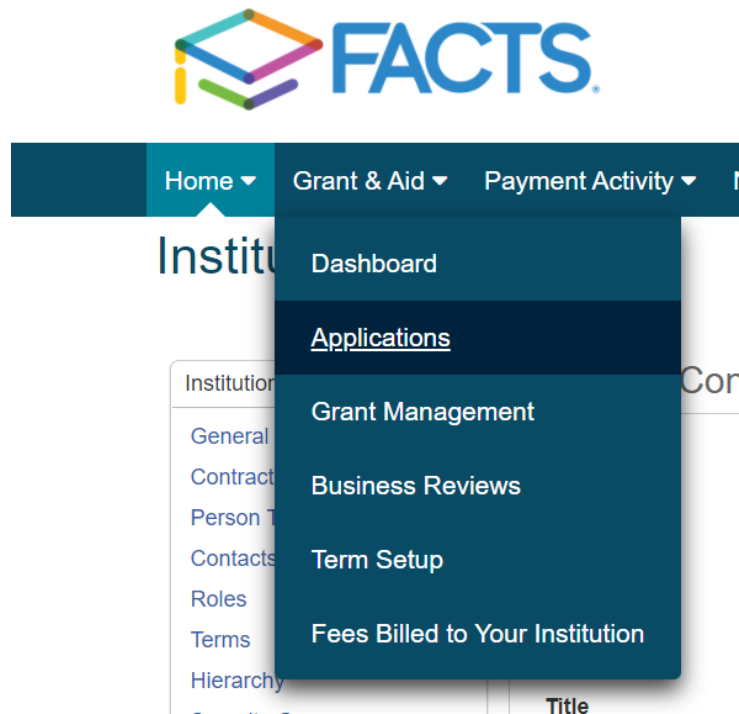


Creating a Custom Report- ACE Contracted Schools

- 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.

Home Grant & Aid Payment Activity Notices Admin Reports

Signed in as Alyson

Applications Institution Summary | Term 2022-2023 School Year

ACE Scholarships

Standard Reports
 Applicant Status
 Applicant Income
 Applicant Demographic
 Student Status
 Student Income
 Student Demographic
 Student Free & Reduced Lunch
 Custom Applicant Reports
 Test

Edit Share New Delete

Hide Personally Identifiable Information
 This includes information such as name, address, email, and phone numbers.

- 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

Step 2: Select Data

Choose how you want to view the data

- Student report Applicant report

Step 3: Select Fields

Grade

Available fields Show all Fields

Grade
 Grade Code
 Grade Label
 Prior Year Grade (Custom)

Selected fields
 Student Name

4 available fields 1 available field

- 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 the

first option to enter the question regarding the 529 Plan into the report

Step 3: Select Fields

ace

Available fields Show all Fields

Selected fields

Applicant Name

529 Plan - ACE Scholarships Louisiana {Custom}

26 available fields

2 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 529 Plan column and using the filter select 'yes' and 'no'. This will show you all families who have added ACE to their application and have thus answered the ACE related question.

Open Column

Clear Sort/Filter

	Student ID ↑↓	Student Name ↑↓	Grade ↑↓	529 Plan - ACE Scholarships Louisiana ↑↓
<input type="checkbox"/>			01	<input type="checkbox"/>
<input type="checkbox"/>			07	<input type="checkbox"/>
<input type="checkbox"/>			01	<input checked="" type="checkbox"/>
<input type="checkbox"/>			02	<input checked="" type="checkbox"/>
<input type="checkbox"/>			07	<input type="checkbox"/>
<input type="checkbox"/>			02	<input type="checkbox"/>
<input type="checkbox"/>			01	<input type="checkbox"/>

2 of 3 selected

(Blanks)

No

Yes

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