

Financial Aid Communication System (FACS) Training

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Objectives

- By the end of the training course all FACS users should be able to:
 - Log into FACS
 - Navigate the system
 - Run existing/shared reports from the homepage
 - Identify when to submit a FACS Issue
 - Work issues

Objectives: Managers/Supervisors

- Managers and Supervisors will also be able to:
 - View and utilize the FACS Dashboard
 - Run existing reports, such as: Unassigned Issues, Not Actioned/Assigned Issues, Pending Issues over seven days
 - Create new reports and Saved Searches to monitor their staff

Financial Aid Communication System (FACS)

- Who uses FACS?
 - Career Offices
 - Call Centers
 - Financial Aid Payment Office (FAPO)
- Purpose: Replace e-mailing/faxing of forms
 - tracks communication regarding pending or processed financial aid applications in a centralized manner
 - Examples:
 - Career Offices communicate to Call Centers such things as changes in household.
 - Call Centers communicate with FAPO regarding billing issues.
 - Career Office communicates an action to Call Center that something needs to be done in the Financial Aid Management System (FAMS) (e.g., “Mark Ship,” “Need Now”).

Types of FACS Issues

- Current list of Issue Types
 - 24 Hour Priority Request
 - Can't Complete Referral
 - Case Status inquiry
 - Change CC Vendor Request
 - Child Care Action
 - Child Care Billing Issue
 - Child w/Disability
 - Confiscate attendance card
 - Data Entry Issue
 - Fraud Referral
 - Immediate Priority Request
 - Mark Ship Request
 - Need Now Request
 - Recoupment
 - Referral Fix
 - TAA High Priority
 - Vendor POS Malfunction

Definitions

- Submitter
- Assigned to
- Next Action
- Group
- Issue Types
- Quick Picks
- Tasks
- Status: Closed/Open
- Reports
- Saved Search

Dos and Don'ts (Career Offices)

- Do use FACS when:
 - Requesting CCAA Cards, withdrawals, suspensions, four-week seekings, etc.
- Don't use FACS when:
 - Requesting mark ship. This will be cleared during weekly review of reports.
 - Requesting "need now." This is cleared during weekly review of reports. However, if expedited service is needed, please submit via FACS.
 - Requesting eligibility to be processed for scholarships. Funding is not available. If customer will be placed on the registry, priority service is not needed.
 - Checking case status. Please view weekly Funding Alert for screening time frame. However, if it is outside of the reported time frame for a case to be screened, or if priority service is requested, submit a FACS issue.

Accessing FACS

- Login: <http://facs.issuetrak.com/Login.asp>
- Forgot password?
 - Enter user ID
 - Click “Forgot your password?” link
 - An e-mail will be sent to your work address to reset password
- **Homepage** – Three Important Areas:
 - Navigation pane (left of page)
 - “Show Open Issues” (top of page)
 - “My Reports” (bottom of page)

FACS HOMEPAGE



Financial Aid Communication System



Home

Main Menu

Home - Issues for testjoe2, testjoe2

My Neighborhood Centers

- Dashboard
- Dashboard Settings

My Issues

- My Settings
- Change Password
- Submit Issue
- Search Issues
- Lookup Issue #
- Knowledge Base
- Reports
- Log Out

Navigation
Pane

User's name

Show Open Issues

- Summary (includes all categories listed below)
- As Submitter (0)
- As Next Action (2)
- As Task Assignee (0)
- As Task Available (0)

Check on issues you submitted

Check on issues that have been sent to you to resolve

My Reports

Hide Shared Reports

- Active Users by Career Office *
- All Issues assigned to Admin *
- All Unassigned Issues *
- Issue Search by User (S) *
- Issues created last month by Issue Type *
- Issues created last month by Issue Type (copy) *
- Issues open for more than 7 days: By Next Action *

(S) Saved Search

* Shared

Run Report

Edit Report

Delete Report

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To Submit an Issue

- Select “Submit an Issue”
- Choose Quick Pick from dropdown (refer to Issue Types chart to select appropriate Issue Template)
- Follow instructions in body
- Select “Issue Type” (Usually same as Quick Pick)
- Make sure “Next Action” field is populated
 - Quick Picks usually have a default group selected
 - If field is blank, Issue will show up on the “unassigned/not next actioned” weekly report
- Check “Include Attachments” check box if necessary
- Click “Submit Issue” button
- Include attachments/necessary documentation in pop-up window (only if “Include Attachments” check box was checked)

To Work an Issue

- From Homepage, select “Next Action to me”
- Sort Issues on next screen
- Select an Issue to work
- Read description
- Check attachments (they have information necessary for you to complete the issue)
- Follow tasks and mark each completed as you go
- Close the issue
- If you can't close an issue or complete an action:
 - Click “Next Action” in navigation pane, enter note and enter a name or a Group in the “Next Action Field” to send the issue back for more information or to take some other action. Click “Update” button.

To Search for an Issue

- Select “Search Issues” from Navigation panel
- Enter search criteria
- Click “Search” button at top of page.
 - You can also save a detailed search as a “Saved Search” for repeated use.
 - Your “Saved Searches” will appear in the bottom portion of your homepage.

Other features

- Look up Issue by Issue #
- Miscellaneous actions on issues:
 - **Add Notes** – You can add notes or comments to an issue, even after it has been closed.
 - **Edit** – You can change the data on an issue. Use this if you are going to work the issue.
 - **E-mail** – You can escalate an issue by e-mailing a copy directly to another FACS user, and can be added to issue as a Note.
 - **Close** – This should be done by the person who completed the last task for the issue, or by the person who created it.

Running Shared Reports and Saved Searches

- Select any of the reports listed in “My Reports” section
- Click “Run Report” button
- Description of report is at top of the page
- Subjects are hyperlinked to each issue


Questions and Answers

- Materials augmenting today's training (including charts and PowerPoint) will be sent to all managers via e-mail. They can disseminate information to you.
- If you have future questions, please send them to me at:
Joseph.Chauncey@wrksolutions.com


Managers and Supervisors

- View and utilize the FACS Dashboard
- Run existing reports, such as: Unassigned Issues, Not Actioned/Assigned Issues, and Pending Issues over seven days
 - Reports can be exported to Excel
- Create new reports and Saved Searches for monitoring purposes

Sample: Dashboard



Financial Aid Communication System



Home
Main Menu

06/12/2013 3:21PM (Refresh in 5 minutes...)
Reload


My Neighborhood Centers

Dashboard

- Dashboard Settings
- My Issues
- My Settings
- Change Password
- Submit Issue
- Search Issues
- Lookup Issue #
- Knowledge Base
- Reports
- Log Out

Open Issues by Priority

Priority	Count
High	203
Medium	367
Low	2

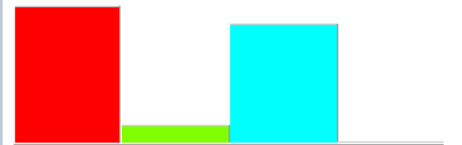


Open Issues by Issue Type

Issue Type	Count
24 Hour Priority Request	59
Bill Services	51
Can't Complete Referral	1
Case Status Inquiry	15
CCAA Issue	12
Change Vendor Information	2
Change Vendor Service Details	1
Child Care Action	10


System Overview

Open Issues	572
Assigned Issues	73
Unassigned Issues	499
Issues Escalated	0



Open Issues by Organization

Organization	Count
Houston Works	3
Interfaith of The Woodlands	105
NCI	244
Neighborhood Centers, Inc.	201
ResCare	7



Current Qtr Performance

	Apr	May	Jun
Issues Opened	1422	1433	622
Issues Reopened	1	2	8
Issues Closed	1692	1168	948
Avg Resolution Time	1085:36	69:23	250:32

Times are formatted as hh:mm

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Reports and Saved Searches

- Both Reports and Saved Searches are at the bottom of the homepage
 - New Saved Searches can be created by any user from the “Search Issues” page.
 - Administrator can create Saved Searches to be shared with other users.

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