

Account Profile: Manage Payers (Authorized Parties)

An Authorized Party is someone that the customer has authorized to contact FACTS about the account and to make changes on their behalf. The customer can add and remove authorized parties through the user account.

Navigation

- On the blue navigation bar at the top of the screen, click **My Profile**.
- Select **Add** or **Edit** in the Manage Payers section, depending on the action you want to take.

Home My Profile Financial Accounts Signed in as Test

My Profile

Contact Information Edit

Address
121 S 13th St
Lincoln, NE 68508
United States

E-mail Addresses
 [testperson1@gmail.com](#) Update

Phone Numbers
Daytime: (402)466-1063

Communication Settings Edit

Text Services
You are not currently registered for Text Services.
Text Inquiry: Get your balance and make a payment anywhere and anytime. All you have to do is text **BAL**.
Payment Reminders: We will send you payment reminders before your next payment is due.

Notifications
Payment Reminders: E-mail
Other Notifications: Postal

Online Access Edit

Username and Password
testperson1

Authentication Edit

Phone Authentication
4-Digit PIN: 1063
Q: What is the first name of your favorite aunt?
A: aunt
Q: What is the first name of your favorite uncle?
A: uncle

Manage Payers Add

An authorized party is someone you authorize to discuss your account and make changes on your behalf.

Adding an Authorized Party

Most of these fields are available when a customer is adding an Authorized Party.

- **Authorized Party Information:** Complete the First and Last Name fields.
- **What can the authorized party access?** Most institutions will offer only Limited Access or only Full Access and the user will not see this choice.

Authorized Parties ×

This setting controls what the authorized party can see online and discuss with FACTS over the phone.

- **Limited Access:** This option limits the authorized party's access to just your overall account balance and the activity that the authorized party has initiated on your behalf, such as payments.
- **Full Access:** This option gives the authorized party access to all activity on your Sample Institution account regardless of who initiated the activity, whether that is you or another authorized party.

Authorized parties do not have access to your contact information, user credentials, other authorized parties or your financial account information.

- **Authentication Question:** This will be used to authenticate the authorized party for phone calls to FACTS or during online account creation.
- **Web Access:** The customer determines whether the authorized party can create an online account by entering their email address. Upon saving, an email will be generated to the authorized party inviting them to create a user account.
- **Terms and Conditions:** Click **Save** to agree to the terms and conditions.

Add Authorized Party

First Name

Last Name

Authorized Party Access ?

- Limited - The authorized party can view your balances only.
- Full - The authorized party can view everything as you see it, except for your financial information.

Authorized Party Authentication

Create a question that the authorized party will know the answer to. You may want to inform the authorized party of this question and answer.

Authorized Party Authentication Question

e.g. What year did we go to Florida?

Authorized Party Authentication Answer

e.g. 2010

Web Access

Enter an e-mail address to allow this person to create an account and pay online. An e-mail will be sent to this address upon save. If the E-mail Address field is left blank, the authorized party will only be able to discuss your account with FACTS over the phone.

E-mail Address

Terms and Conditions

By creating an Authorized Party you are giving explicit consent for that individual to view and discuss your account information, make payments on your behalf, and take any other action with reference to your account as could be taken by you except for changing your authentication information. This authorization will remain in effect until you remove the individual as an Authorized Party on your account.

By adding this Authorized Party you, Test Customer, agree to the terms and conditions.

[Cancel](#)

[Save](#)

Additional information about Authorized Parties

- Authorized Parties cannot view the financial account information for other users or access someone else's financial account to make payments. They have access to the payment history where the last four digits of any financial account used to make payments are displayed.
- When an Authorized Party makes a payment, a confirmation email is sent to the customer and the Authorized Party making the payment. This email contains the name of the bank and the last four digits of the financial account number used to make the payment.

Sample invitation for online access

Another Academy of FACTS Authorized Party Invite

Sample Customer
Customer #: 5082511881

Sample AP:

For your convenience, Sample Customer has added you as an Authorized Party at Another Academy of FACTS. As an Authorized Party you can view information and make payments toward the balance owed to Another Academy of FACTS.

To accept this invitation, go to FACTS to set up your Authorized Party account.

[Go to FACTS](#)

Thank you,
FACTS Management Company


Si usted tiene preguntas sobre esta correspondencia,
llame al Servicio al cliente (866)441-4637.

Please do not reply to this automated message. The mailbox is not monitored.

Deactivating an Authorized Party

- Click **Edit** next to the Authorized Payer in the Manage Payers section of My Profile.
- Select **Deactivate**.
- Click **Save**.

The Authorized Party will continue to show in your profile with an Inactive status. You may reactivate their status at any time.

 [Back to My Profile](#)

Edit Authorized Party

First Name

Last Name

Authorized Party Access

- Limited - The authorized party can view your balances only.
- Full - The authorized party can view everything as you see it, except for your financial information.
- Deactivate - By deactivating this authorized party you are removing their right to access your account balance.

[Cancel](#)

Save