



OnCare Office Ver 3.0.6

Release Notes: Oct 17, 2015

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1. New: Batch Emails: Send Mail to OTP Registered/Non-Registered Families

Parent Communication: Batch Emails→ Send General Mail : Center Directors can now have the privilege to choose between families registered/non-registered in OTP to send batch emails.

Send Mail

Download

>> Select Families

Family Status

All

Child Status

All

Select Families

☒ All (Selecting 'All' will list families without child(ren) record)

☒ Not Assigned ☒ Green Room ☒ Falcons ☒ Eagles

☒ Blue Room ☒ Purple Room ☒ Chickadees

Online Payment

☐ All

☒ Registered Parents ☐ Non Registered Parents

Submit

Back

Note: If families are not listed here, please check the "Selection Criteria" and "Email Preference" value in Family Record.

2. New: Invoice can be viewed in Account Ledger

Invoice can be viewed directly from the Account Ledger Page.

Show Ledger All Hide Void Post Ledger Item ?										
Ledger	Posting Date	Check #	Description	Comments	Child Name	Charges	Credit	Balance	Action	Invoice Number
Sponsor	10/16/2015		2 Day Schedule		Hansel	\$ 2.00		\$ 2.00	Void	
Co-Sponsor	10/16/2015		2 Day Schedule		Hansel	\$ 3.00		\$ 5.00	Void	
CCRM	10/16/2015		2 Day Schedule		Hansel	\$ 4.00		\$ 9.00	Void	0000172
CCRM	10/16/2015	5757557	Payment - Check				\$ 2.00	\$ 7.00	Void	
Sponsor	10/16/2015		Convenience fee	O902512		\$ 0.07		\$ 7.07	Void	
Sponsor	10/16/2015		TPD Card Payment	O902512			\$ 1.07	\$ 6.00	Void	
Co-Sponsor	10/16/2015		Convenience fee	O00000004970 - Processed		\$ 2.20		\$ 8.20	Void	
Co-Sponsor	10/16/2015		TAP ACH Payment	O00000004970 - Processed			\$ 3.20	\$ 5.00	Void	
Today's Bal.								\$ 5.00		

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3. **Enhanced:** Service Fee, TAP, TPD Payments reflect on the Ledger

The service Fees for TAP/TPD and the payment made through TAP/TPD reflect on the Account Ledger. This helps the director to track the payments made at a single ledger.

Show Ledger All Hide Void Post Ledger Item ?										
Ledger	Posting Date	Check #	Description	Comments	Child Name	Charges	Credit	Balance	Action	Invoice Number
Sponsor	10/16/2015		2 Day Schedule		Hansel	\$ 2.00		\$ 2.00	Void	
Co-Sponsor	10/16/2015		2 Day Schedule		Hansel	\$ 3.00		\$ 5.00	Void	
CCRM	10/16/2015		2 Day Schedule		Hansel	\$ 4.00		\$ 9.00	Void	0000172
CCRM	10/16/2015	5757557	Payment - Check				\$ 2.00	\$ 7.00	Void	
Sponsor	10/16/2015		Convenience fee	O902512		\$ 0.07		\$ 7.07	Void	
Sponsor	10/16/2015		TPD Card Payment	O902512			\$ 1.07	\$ 6.00	Void	
Co-Sponsor	10/16/2015		Convenience fee	O00000004970 - Processed		\$ 2.20		\$ 8.20	Void	
Co-Sponsor	10/16/2015		TAP ACH Payment	O00000004970 - Processed			\$ 3.20	\$ 5.00	Void	
Today's Bal.								\$ 5.00		

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4. **Enhanced:** Manage TAP Families

View Filter: This page has an enhanced look with filter of Active/Inactive/Incoming/Waitlist parents enrolled with TAP.

>> Manage TAP Families										
Manage TAP Payments -> Manage TAP Families										
Following are the actions you can perform on an active TAP family:										
1) Disenroll a family from TAP - Parents are not able to disenroll themselves via the Parent Portal.										
2) Replace funding account - Help a parent to replace their existing funding acct (credit card or ACH) with a new account.										
3) Edit card info - Help a parent to edit their existing credit card information on file. Edit is not available for ACH.										
View Active										
No.	Fam Acct Key	Parent Name	Child Name	Pymt Type	Parent Type	Funding Account Name	Date Enrolled	Action		
1	AYLE	Florinda Galvez	Kenny	ACH	Co-Sponsor	Florinda	10/16/2015	Disenroll	Replace Acct	
2	BORE	Andrew Borelli	Molly	ACH	Sponsor	Andrew	10/16/2015	Disenroll	Replace Acct	
3	BROW	Victoria Hughes	Juliana	Card	Co-Sponsor	Victoria	10/16/2015	Disenroll	Replace Acct	Edit Card Info

5. Enhanced: Manage TPD Families

View Filter: This page has an enhanced look with filter of Active/Inactive/Incoming/Waitlist parents enrolled with TPD.

Sorting: Also Sorting can be done based Parent Name and Date Enrolled. The default sorting order will be based on Family Act Key.

Recurring On: Now the center director can be aware of the next recurring payment.

>> Families Enrolled in TPD								
Manage TPD Payments -> Manage TPD Families								
								View Active ▾
No.	Family Acct Key	Parent Name	Child Name	Payment Type	Parent Type	Funding Acct Name	Date Enrolled	Recurring On
1	Navis	Antony Navis	Erica	Card	Sponsor	Antony Navis	10/16/2015	N
2	Hansel	Mikel S	Hansel	Card	Sponsor	Hansel Marion	10/17/2015	Y Monthly Day of the month (4th)
3	Alex	Alex Barrow	Louella	ACH	Sponsor	Alex Barrow	10/12/2015	Y Weekly Day of the week (Mon)

6. Enhanced: Process New Tap Payment

This page has new filters to choose Active/Inactive/Waitlist/Incoming families and/or Classroom specific families.

>> Process New TAP Payments	
<div><div>Select Payment Type</div><div><div>Checking / Savings Account</div><div>Credit / Debit Card</div></div></div>	
<div>Select Families</div> <div><input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Inactive <input checked="" type="checkbox"/> Waitlist <input checked="" type="checkbox"/> Incoming</div>	
<div>Select Classroom</div> <div><input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Not Assigned <input checked="" type="checkbox"/> Green Room <input checked="" type="checkbox"/> Falcons <input checked="" type="checkbox"/> Eagles <input checked="" type="checkbox"/> Blue Room <input checked="" type="checkbox"/> Purple Room <input checked="" type="checkbox"/> Chickadees</div>	
<div>Next</div>	

7. Enhanced: Ability to see All Transactions of TAP Payments

The parent portal shows transaction history of all the payments made through TAP.

>> Manage Tuition Auto Pay (TAP)					
Funding Account Name	Account Holder Name	Date Enrolled	Account/Card Number	Payment Type	Action
Glen Smith	Glen Smith	10/13/2015	XXXXXX1111	ACH	Replace

Transaction Date	Payment Amount	Payment Status
10/14/2015	\$ 125	Processing
9/14/2015	\$ 125	Settled
8/14/2015	\$ 125	Settled
7/5/2015	\$ 75	Settled
6/14/2015	\$ 20	Settled
5/14/2015	\$ 125	Settled
4/13/2015	\$ 125	Settled
3/13/2015	\$ 125	Settled
2/13/2015	\$ 125	Settled
2/13/2015	\$ 125	Failed

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8. Fixed: School Id column is added to Open Invoice Extract

In Multi Location Report → Family Accounting → Open Invoice Extract

New column – Student Id is inserted after child name in the extracted CSV file.

Report Name	Open Invoice Extract				
Open Invoice Extract as of	10/15/2015				
Agency	All				
Center	Agency	Fam Acct Key	Child Name	Student ID	Posting Date
Sandbox Framingham	Child Care Resourc	AYLE	Kenny Aylett		04-01-2015
Sandbox Framingham	Child Care Resourc	AYLE	Kenny Aylett		08-11-2014
Sandbox Framingham	Child Care Resourc	AYLE	Kenny Aylett		09/01/2014 ; 10/01/
Sandbox Framingham	Child Care Resourc	AYLE	Kenny Aylett		09-01-2015
Sandbox Framingham	Child Care Resourc	AYLE	Kenny Aylett		08-01-2015
Sandbox Framingham	Child Care Resourc	AYLE	Kenny Aylett		11-06-2014
Sandbox Framingham	Child Care Resourc	CLAU	Alison Clausen		07-28-2014

9. Fixed: Special Diet – Multi option can be chosen

In Edit Child page: Earlier the multi option function was not allowed- Either you can choose an option from the list or enter comments under other diets. Now the user can choose multi special diets and also enter in the comments.

Allergy / Medication / Special Diets Information[Medication / Special Diets Setup](#)

Non-Food Allergy ☐ Yes ☒ No

Medication ☐ Yes ☒ No

Special Diet/Food Allergy ☒ Yes ☐ No

☒ Vegan ☒ No Beef ☐ No Pork

Other

No Nuts too please.