OnCare Office Version 3.0.7

Release Notes: Dec 12, 2015

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Following items are NOT APPLICABLE to Legacy TPD clients (please skip).

The items are relevant for clients using New (TAP+TPD) Online Tuition Payment only.

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1. Enhanced: Family and Child Records UI Redesign

The Family Accounting Main Menu has been redesigned to allow for faster access to family and child records.

Family Records

The family records are listed by Family Account Key. All active families are listed by default. **Each family is only listed once on the list.**

Child Records

The child records are listed and sorted by child Last name. The sorting filters are available on Classroom, DOB, Enrolment & Withdrawal Date and Family Act Key.

The Enrolment Date and Withdrawal Date are displayed based on the child status filter:

- If the Child Status "Active" is selected, Enrolment Date is shown.
- If the Child Status "Inactive" is selected, Withdrawal Date is shown.
- If the Child Status "Incoming/Waitlist" is selected, the Enrolment/Withdrawal Date is not shown.
- If the Child Status "All" is selected, both Enrolment and Withdrawal Dates are shown.

>> Child View

Note: To sort, click on the underlined column header   Classroom All   Child Active

No.	Child LN	Child FN	Classroom	DOB	Enrollment Date	Family Acct Key	Parent#1	Parent#2
1	Bloom	Piper	Infant 1	03/04/2014	05/27/2014	KarRealCC	Karthik TAP	Ben Bloom
2	Bloom	Silas	Toddler 2	03/14/2012	07/21/2014	KarRealCC	Karthik TAP	Ben Bloom
3	Briggs	Iris	Preschool 2	05/07/2011	03/15/2012	BRIGGS	Richard Briggs	Jenny Briggs
4	Britt	Braelyn		08/26/2009	07/14/2014	BRITT	Darcy Montgomery	John Montgomery
5	Brown	John	PreK 1	01/26/2010	08/25/2013	BROWN	Jeffrey Brown	Abigail Brown
6	Burnidge	Aurea	Preschool 1	11/19/2010	02/17/2011	BURNIDGE	William Burnidge	Collen Burnidge

>> Child View

Note: To sort, click on the underlined column header   Classroom All   Child Inactive

No.	Child LN	Child FN	Classroom	DOB	Withdrawal Date	Family Acct Key	Parent#1	Parent#2
1	Clark	Fredy	Toddler 1	01/19/2012	09/01/2015	CLARK	Danny (Dan) Clark	Trisha Clark
2	Field	Natalie	Preschool 1	06/25/2011	05/31/2015	FIELD	Kristin Field	James Field
3	Pettersen	Caleb	Toddler 1	07/27/2012	05/29/2015	PETTERSEN	Sean Pettersen	Nicole Swaggerty

2. New: Camp Registration Module

If you center offers summer camp, click on Learn More >> to learn more about how you can use the new module to streamline your summer camp registration.

Learn More >>

OnCare Office   Hello, Simon Gen

Online Center Management
- Family Accounting
- Time / Attendance Tracking
- Camp Registration (New) Learn More >>

Online Marketing
- Center Tour Request
- Waitlist Online

System Administration
- Administrative Functions
- Role Management
- Reports

Employee / Staff
- Staff Record / Time Sheet

Parents Communication
- Batch Emails

3. New: Staff Birthday Report

The Staff Birthday report can now be generated from Staff Records. The user can choose a specific month or all month(s).

Staff Birthday Report

Staff Status	All ▼
Months	☑ All

☑ Jan	☑ Feb	☑ Mar	☑ Apr	☑ May	☑ Jun
☑ Jul	☑ Aug	☑ Sep	☑ Oct	☑ Nov	☑ Dec

Report Type ○ Pdf ◉ Html

[Submit] [Back]

The Sorting is based on Staff First Name if all the months are selected.

Company Name	: Oncare Demo Company (Sandbox)
Location Name	: Sandbox Boston
Date Generated	: December 10, 2015
Months	: All

Staff Birthday Report

Staff Name	Date of Birth	Age
Amelia Jane	September 15, 1989	26.2 Years
Andrea Mathews	November 17, 1979	36 Years
Marie Amelia	March 20, 1962	53.8 Years
Reena Lane	September 3, 1980	35.3 Years
Rose Gonzales	June 28, 1980	35.5 Years
Steve Hunter	February 17, 1988	27.9 Years

4. Enhanced: Data Download – Child Schedule

Child Schedule can now be sorted based on classroom and enrolment date.

Child Last	Child First	Family Acco	Family Sta	Gender	Child Statu	Child DOB	Child Age	Primary Classro	Program	Enrollment D	Schedule N	Mon	Tue	Wed
Briggs	Iris	BRIGGS	Active	Girl	Active	5/7/2011	4.1	Preschool 2		3/15/2012	Full Time N	1	1	
Britt	Braelyn	BRITT	Active	Girl	Active	8/26/2009	6.1	Unassigned		7/14/2014	Full Time N	1	1	
Brown	John	BROWN	Active	Boy	Active	1/26/2010	5.1	PreK 1		8/25/2013	Full Time T	0	1	
Burnidge	Aurea	BURNIDGE	Active	Girl	Active	11/19/2010		Preschool 1		2/17/2011	Full Time N	1	1	
Burnidge	David	BURNIDGE	Active	Boy	Active	2/23/2013	2.9	Toddler 2		3/15/2012	Full Time N	1	0	
Clough	Gavin	CLOUGH	Active	Boy	Active	8/9/2013	2.4	Infant 1		6/13/2014	Full Time N	1	1	
Clough	Griffin	CLOUGH	Active	Boy	Active	7/19/2011	4.4	Preschool 2		5/1/2014	Full Time N	1	1	
Collins	Lila	COLLINS	Active	Girl	Active	9/17/2012	3.1	Toddler 2		9/11/2012	Full Time N	1	1	
Collins	Rita	COLLINS	Active	Girl	Active	12/16/2009	5.1	PreK 1		2/17/2011	Full Time N	1	1	
Contreras	Selena	CONTRERAS	Active	Girl	Active	9/13/2009	6.1	PreK 1		9/11/2012	Full Time N	1	1	

5. Enhanced: Multi Location Open Invoice Extract

The payment outstanding is listed against each invoice number.

Report Name	Open Invoice Extract As On Posting Date							
Open Invoice Extract as of	12/11/2015							
Agency	All							
Center	Agency	Fam Acct Key	Child Name	Invoice Date	Invoice Number	Invoice Amount	Payment	Amt Outstanding
Sandbox Boston	Child Care Resources of MA	CURIE	Irene Curie	10-07-2015	159	0.2	0.01	0.19
Sandbox Boston	State Subsidy	CURIE	Jack Curie	10-07-2015	160	0.3	0.05	0.25
Sandbox Boston	Child Care Resources of MA	DAVIS	Jason Davis	09-11-2015	115	600	0.01	599.99
Sandbox Boston	Child Care Resources of MA	DAVIS	Sophie Davis	09-08-2015	109	250	160	90
Sandbox Boston	Child Care Resources of MA	DAVIS	Sophie Davis	09-11-2015	125	750	10	740
Sandbox Boston	Child Care Resources of MA	DAVIS	Sophie Davis	09-15-2015	130	250	20	230
Sandbox Boston	Child Care Resources of MA	DAVIS	Sophie Davis	10-07-2015	162	501	0.02	500.98
Sandbox Boston	Child Care Resources of MA	HOLMER	Andrew Trammell	09-11-2015	113	100	0.01	99.99
Sandbox Boston	State Subsidy	08-Jun	inac act fgyufif	09-11-2015	116	400	200	200
Sandbox Boston	Child Care Resources of MA	Kays	Max Kays	09-11-2015	124	1050	0.01	1049.99

6. Enhanced : TAP - Process different TAP amount

Previously when the user needs to process a TAP amount that is different from the ledger balance, the user is taken to a different page. The transaction is handled as an one-time payment and is not part of the overall TAP batch. With this enhancement, the user can change the TAP amount on the same page. The system proposes the ledger balance as the TAP amount. The user can easily change the TAP amount as needed.

After clicking "Next" the system present all the TAP amounts for the user to confirm before submitting. If the TAP amount is less or greater than the Ledger balance, system will highlight that in the Alerts column.

7. New: TAP/TPD – Declined or Failed Card Transactions

Whenever card transactions are declined in TAP and TPD, the director will be notified via email listing all the declined/failed transactions with the list of Parent Names, email, Phone and the transaction amount.

Friday, December 11, 2015

Dear Director,

The following TAP Card tuition payments were declined.

S.No	Parent Name	Date Submitted	Phone	Email	Amount	Decline Reason
1	Marie Curie	12/11/2015	1235666666	curiep@beyonduniverse.in	$0.01	ERROR 1008
2	Marie Curie	12/11/2015	1235666666	sharmila.m@beyonduniverse.in	$0.04	ERROR 1008
3	Erica Navis	12/11/2015		an@beyonduniverse.in	$0.06	ERROR 1008

The system also sent an email alert to each of the parent(s).

Regards,
Oncare Support Team

Similarly, the parents whose card payment were declined/failed will also be notified in a separate email as shown below.

Friday, December 11, 2015

Dear Erica Navis,

Your recent childcare tuition card payment of **$0.06** to **Sandbox Boston** FAILED to process.

Processing Error Message:
Declined
ERROR 1008

Please take the proper steps to correct this issue. To login to your OnCare parent portal account, click here.

p.s. The center director has been alerted about this matter in a separate email.

Sincerely,
OnCare Support Team

8. New: OTP enrolment invitation email reminder

Note: For this function to be effective, it must be enabled for your center.

Whenever a new family is added or an existing active family is being edited, the system will remind the Director to sends the OTP enrolment invitation email to the parents.

To stop the system from showing future reminder on this particular family, check the "**Do Not Show this alert again**" check box.

Note: The OTP enrolment email invitation is based on the ledger type (single/multi ledger) and not by email preference. If the family is a single ledger, the email invitation is sent to the Parent #1 (Sponsor). If the family is multi ledger the invitation is sent to both the parents (Sponsor & Co-Sponsor).

9. Enhanced: Service Fee/Ref ID is shown in Batch Transaction Details

Previously the service fee was not listed in the batch transaction details of TAP/TPD. This enhancement includes the service fee and the reference ID of the transaction.

Batch Transaction Details

Batch: 12/10/2015 - ACH — Transaction Status : All

No.	Family Acct Key	Payer	Child Name	TAP Amount	Service Fee	Total Amount	Reference ID	Status	Message
1	Andrea	Andrea Simmons	Diane Simmons	$ 0.0	$ 0.00	0.02	306200005060	Processed	
2	Kate	Kate Williams	Nancy Samantha	$ 0.0	$ 0.00	0.02	306200005061	Processed	
3	Richard	Richard Brown	Evelyn Smith	$ 0.5	$ 0.00	0.50	307100005077	Processed	
4	Sally	Sally Thomas	Judah	$ 0.4	$ 1.15	1.62	307300005079	Processed	
5	Ted	Erica Navis	Ethan Navis	$ 1.5	$ 1.15	2.70	307400005080	Processed	