



## 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.**

| # | Type     | Module      | Description  | Pg |
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| 6 | Enhanced | New TAP/TPD | Process different TAP amount                             | 6  |
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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.

Quick lookup: [All](#) | [A-B](#) | [C-D](#) | [E-F](#) | [G-H](#) | [I-J](#) | [K-L](#) | [M-N](#) | [O-P](#) | [Q-R](#) | [S-T](#) | [U-V](#) | [W-X](#) | [Y-Z](#)

Family: [Add New](#) [Search](#) [Select](#)

[Family Records](#)

[Child Records](#)

[Family Account Ledger](#)

| Currently Checked In |          |          |
|----------------------|----------|----------|
| Classroom            | Children | Staff    |
| Infant 1             | 0        | 0        |
| Infant 2             | 0        | 0        |
| Preschool 1          | 0        | 0        |
| Preschool 2          | 0        | 0        |
| PreK 1               | 0        | 0        |
| Toddler 1            | 0        | 0        |
| Toddler 2            | 0        | 0        |
| Unassigned           | 0        | 0        |
| <b>Total</b>         | <b>0</b> | <b>0</b> |

[15-min Interval Real Time Head Count](#) Powered by Staff88

### 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.

Quick lookup: [All](#) | [A-B](#) | [C-D](#) | [E-F](#) | [G-H](#) | [I-J](#) | [K-L](#) | [M-N](#) | [O-P](#) | [Q-R](#) | [S-T](#) | [U-V](#) | [W-X](#) | [Y-Z](#)

Family: [Add New](#) [Search](#) [Select](#)

Family

| No. | Family Acct Key           | Parent #1         | Parent #2              | Child(ren)                      | Status |
|-----|---------------------------|-------------------|------------------------|---------------------------------|--------|
| 1   | <a href="#">BRIGGS</a>    | Richard Briggs    | Jenny Briggs           | <a href="#">Iris</a>            | Active |
| 2   | <a href="#">BRITT</a>     | Darcy Montgomery  | John Montgomery        | <a href="#">Braelyn</a>         | Active |
| 3   | <a href="#">BROWN</a>     | Jeffrey Brown     | Abigail Brown          | <a href="#">John</a>            | Active |
| 4   | <a href="#">BURNIDGE</a>  | William Burnidge  | Collen Burnidge        | <a href="#">David , Aurea</a>   | Active |
| 5   | <a href="#">CLARK</a>     | Danny (Dan) Clark | Trisha Clark           | <a href="#">Fredy</a>           | Active |
| 6   | <a href="#">CLOUGH</a>    | Adam Clough       | Mary Clough            | <a href="#">Gavin , Griffin</a> | Active |
| 7   | <a href="#">COLLINS</a>   | Smith Collins     | Karen Collins          | <a href="#">Lila , Rita</a>     | Active |
| 8   | <a href="#">CONTRERAS</a> | Marcos Contreras  | Amy Lunt               | <a href="#">Selena</a>          | Active |
| 9   | <a href="#">CRANSTON</a>  | Adam Cranston     | Voilet Cranston        | <a href="#">Jason</a>           | Active |
| 10  | <a href="#">DENNING</a>   | Paul Denning      | Stephanie Schooley     | <a href="#">Rachel</a>          | Active |
| 11  | <a href="#">DOMBROSKI</a> | Daniel Dombroski  | Andy Novembre          | <a href="#">Alison</a>          | Active |
| 12  | <a href="#">DREIER</a>    | David Dreier      | Christine Smith-Dreier | <a href="#">Jacob</a>           | Active |
| 13  | <a href="#">DURHAM</a>    | Ryan Durham       | Shanna Durham          | <a href="#">Taylor</a>          | Active |
| 14  | <a href="#">DVORAK</a>    | Michael Dvorak    | Andrea Dvorak          | <a href="#">Emily</a>           | Active |

## 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.  | <u>Child LN</u>          | <u>Child FN</u>         | <u>Classroom</u> | <u>DOB</u> | <u>Enrollment Date</u> | <u>Family Acct Key</u>    | <u>Parent#1</u>  | <u>Parent#2</u>  |
| 1  | <a href="#">Bloom</a>    | <a href="#">Piper</a>   | Infant 1         | 03/04/2014 | 05/27/2014             | <a href="#">KarRealCC</a> | Karthik TAP      | Ben Bloom        |
| 2  | <a href="#">Bloom</a>    | <a href="#">Silas</a>   | Toddler 2        | 03/14/2012 | 07/21/2014             | <a href="#">KarRealCC</a> | Karthik TAP      | Ben Bloom        |
| 3  | <a href="#">Briggs</a>   | <a href="#">Iris</a>    | Preschool 2      | 05/07/2011 | 03/15/2012             | <a href="#">BRIGGS</a>    | Richard Briggs   | Jenny Briggs     |
| 4  | <a href="#">Britt</a>    | <a href="#">Braelyn</a> |                  | 08/26/2009 | 07/14/2014             | <a href="#">BRITT</a>     | Darcy Montgomery | John Montgomery  |
| 5  | <a href="#">Brown</a>    | <a href="#">John</a>    | PreK 1           | 01/26/2010 | 08/25/2013             | <a href="#">BROWN</a>     | Jeffrey Brown    | Abigail Brown    |
| 6  | <a href="#">Burnidge</a> | <a href="#">Aurea</a>   | Preschool 1      | 11/19/2010 | 02/17/2011             | <a href="#">BURNIDGE</a>  | William Burnidge | Colleen Burnidge |


| >> Child View  |                           |                         |                  |            |                        |                           |                   |                  |
|--|---------------------------|-------------------------|------------------|------------|------------------------|---------------------------|-------------------|------------------|
| Note: To sort, click on the underlined column header |                           |                         |                  |            |                        |                           |                   |                  |
|  |                           |                         |                  |            | Classroom              | All                       | Child             | Inactive         |
| No.  | <u>Child LN</u>           | <u>Child FN</u>         | <u>Classroom</u> | <u>DOB</u> | <u>Withdrawal Date</u> | <u>Family Acct Key</u>    | <u>Parent#1</u>   | <u>Parent#2</u>  |
| 1  | <a href="#">Clark</a>     | <a href="#">Fredy</a>   | Toddler 1        | 01/19/2012 | 09/01/2015             | <a href="#">CLARK</a>     | Danny (Dan) Clark | Trisha Clark     |
| 2  | <a href="#">Field</a>     | <a href="#">Natalie</a> | Preschool 1      | 06/25/2011 | 05/31/2015             | <a href="#">FIELD</a>     | Kristin Field     | James Field      |
| 3  | <a href="#">Pettersen</a> | <a href="#">Caleb</a>   | Toddler 1        | 07/27/2012 | 05/29/2015             | <a href="#">PETTERSEN</a> | 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.

OnCare Office


Hello, Simon Gen

Online Center Management


- [Family Accounting](#)
- [Time / Attendance Tracking](#)
- [Camp Registration \(New\) \[Learn More >>\]\(#\)](#)

Employee / Staff


- [Staff Record / Time Sheet](#)

Online Marketing

- [Center Tour Request](#)
- [Waitlist Online](#)

Parents Communication

- [Batch Emails](#)

System Administration

- [Administrative Functions](#)
- [Role Management](#)
- [Reports](#)

### 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.

|                       |                                 |
|-----------------------|---------------------------------|
| <b>Company Name</b>   | : Oncare Demo Company (Sandbox) |
| <b>Location Name</b>  | : Sandbox Boston                |
| <b>Date Generated</b> | : December 10, 2015             |
| <b>Months</b>         | : 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.

>> Selection List

Select Data  ▼

- Select here...
- Family and Child Basic
- Family Info
- Child Basic
- Child Contacts
- Child Questions
- Child Schedule

| Child Last | Child First | Family Acco | Family Sta | Gender | Child Statu | Child DOB  | Child Age | Primary Classro | Program | Enrollment D | Schedule    | Mon | Tue | Wed |
|------------|-------------|-------------|------------|--------|-------------|------------|-----------|-----------------|---------|--------------|-------------|-----|-----|-----|
| Briggs     | Iris        | BRIGGS      | Active     | Girl   | Active      | 5/7/2011   | 4.        | Preschool 2     |         | 3/15/2012    | Full Time N | 1   | 1   |     |
| Britt      | Braelyn     | BRITT       | Active     | Girl   | Active      | 8/26/2009  | 6.        | Unassigned      |         | 7/14/2014    | Full Time N | 1   | 1   |     |
| Brown      | John        | BROWN       | Active     | Boy    | Active      | 1/26/2010  | 5.        | PreK 1          |         | 8/25/2013    | Full Time T | 0   | 1   |     |
| Burnidge   | Aurea       | BURNIDGE    | Active     | Girl   | Active      | 11/19/2010 | 7.        | Preschool 1     |         | 2/17/2011    | Full Time N | 1   | 1   |     |
| Burnidge   | David       | BURNIDGE    | Active     | Boy    | Active      | 2/23/2013  | 2.        | Toddler 2       |         | 3/15/2012    | Full Time N | 1   | 0   |     |
| Clough     | Gavin       | CLOUGH      | Active     | Boy    | Active      | 8/9/2013   | 2.        | Infant 1        |         | 6/13/2014    | Full Time N | 1   | 1   |     |
| Clough     | Griffin     | CLOUGH      | Active     | Boy    | Active      | 7/19/2011  | 4.        | Preschool 2     |         | 5/1/2014     | Full Time N | 1   | 1   |     |
| Collins    | Lila        | COLLINS     | Active     | Girl   | Active      | 9/17/2012  | 3.        | 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.        | 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         |  |  |  |  |  |

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.

## 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.

**>> Process TAP ACH Payments**

[TAP Home](#) -> Review and Edit TAP Amount to Draft

Following is a listing of TAP families with a ledger balance as of today (12/10/2015 ). The TAP amount to process is defaulted to the family account ledger balance. You can keep or edit the amount.

**Instructions**

- To take a quick **view** of the ledger balance details without changing the ledger, click on the "**View**" hyperlink.
- To **edit** the TAP amount which is equivalent to the ledger balance, click on the "**Edit**" hyperlink.
- Once you are ready to submit the batch for processing, click on the "**Next**" button at the bottom of the page.

| No.          | Sel.                                | Family Acct Key | Payer            | Ledger     | Child Names | Ledger Balance | TAP Amt to Process (A) | Service Fee (B) | Total (A + B)    | Action                                    |
|--------------|-------------------------------------|-----------------|------------------|------------|-------------|----------------|------------------------|-----------------|------------------|---|
| 1            | <input checked="" type="checkbox"/> | Erica           | Erica Navis      | Sponsor    | Gerlin      | \$ 200         | \$ 200.00              | \$ 1.15         | \$ 201.15        | <a href="#">View</a> <a href="#">Edit</a> |
| 2            | <input checked="" type="checkbox"/> | Richard         | Richard Mary     | Co-Sponsor | Hansel      | \$ 200         | \$ 300.00              | \$ 1.15         | \$ 301.15        | <a href="#">View</a> <a href="#">Edit</a> |
| 3            | <input type="checkbox"/>            | KUMAR           | Prem Kumar       | Sponsor    | Jude,       | \$ 200         | \$ 315                 | \$ 1.15         | \$ 316.15        | <a href="#">View</a> <a href="#">Edit</a> |
| 4            | <input checked="" type="checkbox"/> | Mikel           | Sharmila Michael | Sponsor    | Geraldin    | \$ 180         | \$ 170.00              | \$ 1.15         | \$ 171.15        | <a href="#">View</a> <a href="#">Edit</a> |
| <b>Total</b> |                                     |                 |                  |            |             |                |                        |                 | <b>\$ 989.60</b> |   |

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.

[TAP Home](#) -> Submit TAP Payments for Processing

Please confirm the 'Amounts to Process' are correct. Click the 'Submit' button when you are ready to submit this batch of TAP payments for processing by close of business today.

| No.          | Family Acct Key | Payer            | Ledger     | Child Names | Ledger Balance (A) | TAP Amt to Process | Service Fee (B) | Total (A + B) | Alerts   |
|--------------|-----------------|------------------|------------|-------------|--------------------|--------------------|-----------------|---------------|--|
| 1            | Erica           | Erica Navis      | Sponsor    | Gerlin      | \$ 200             | \$ 200             | \$ 1.15         | \$ 201.15     |  |
| 2            | Frnd            | Richard Mary     | Co-Sponsor | Hansel      | \$ 200             | \$ 300             | \$ 1.15         | \$ 301.15     | Amount to Process is GREATER than the Ledger Balance |
| 3            | Mikel           | Sharmila Michael | Sponsor    | Geraldin    | \$ 180             | \$ 170             | \$ 1.15         | \$ 171.15     | Amount to Process is LESS than the Ledger Balance    |
| <b>Total</b> |                 |                  |            |             |                    |                    |                 |               | <b>\$ 673.45</b>                                     |

[Back](#) [Submit](#) [Cancel](#)

## 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,<br>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 <b>\$0.06</b> to <b>Sandbox Boston</b> FAILED to process.                         |  |
| <b>Processing Error Message:</b>  |  |
| Declined<br>ERROR 1008  |  |
| Please take the proper steps to correct this issue. To login to your OnCare parent portal account, <a href="#">click here</a> . |  |
| p.s. The center director has been alerted about this matter in a separate email.  |  |
| Sincerely,<br>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 send 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).

The screenshot shows a web interface with a tab labeled "Parent Information". Inside the tab, there is a yellow box containing the following text:

The record has been updated successfully.

This parent has not enrolled in online tuition payment, would you like to send out a online tuition payment option reminder to the parent?

☐ Do Not Show this alert again.

At the bottom of the yellow box are two buttons: "Yes" and "No".

## 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.

The screenshot shows a table titled "Batch Transaction Details" with a dropdown menu for "Transaction Status" set to "All". The table has the following columns: No., Family Acct Key, Payer, Child Name, TAP Amount, Service Fee, Total Amount, Reference ID, Status, and Message. The data rows are as follows:

| No. | Family Acct Key | Payer          | Child Name     | TAP Amount | Service Fee | Total Amount | Reference ID | Status    | Message |
|-----|-----------------|----------------|----------------|------------|-------------|--------------|--------------|-----------|---------|
| 1   | Andrea          | Andrea Simmons | Diane Simmons  | \$ 0.02    | \$ 0.00     | \$ 0.02      | 806200005060 | Processed |         |
| 2   | Kate            | Kate Williams  | Nancy Samantha | \$ 0.02    | \$ 0.00     | \$ 0.02      | 806200005061 | Processed |         |
| 3   | Richard         | Richard Brown  | Evelyn Smith   | \$ 0.50    | \$ 0.00     | \$ 0.50      | 807100005077 | Processed |         |
| 4   | Sally           | Sally Thomas   | Judah          | \$ 0.40    | \$ 1.15     | \$ 1.62      | 807300005079 | Processed |         |
| 5   | Ted             | Erica Navis    | Ethan Navis    | \$ 1.50    | \$ 1.15     | \$ 2.70      | 807400005080 | Processed |         |

In the screenshot, the "Service Fee" and "Reference ID" columns are highlighted with red boxes.