



OnCare Office Ver 3.2.2 E1

Release Notes: Apr 17, 2017

Customer Features:

#	Type	Module	Description	Pg
1	New	Family Accounting	Batch Child Update feature added in the Functions Menu	1
2	New	Batch Emails	New feature to send the Account statement automatically added in the Setup menu	5
3	New	Administrative Functions	Manage Centers option added	7
4	New	Family Accounting	Child can be exempted from immunization at dosage level	9
5	New	Batch Email	User can now send reminder emails for immunization due	13
6	New	Family Accounting / Parent Portal	The parents will now receive the payment receipts in emails	17
7	New	Family Accounting	The TAP/TPD/CSP can now be refunded	18
8	New	Parent Portal	Parents can now have multiple funding accounts	21
9	New	Online Forms	New Forms module has been enabled	26
10	New	Batch Emails	Users can now view the history of emails sent	36
11.	New	Family Accounting / Parent Portal	Discount feature has been introduced for payments	37
12.	New	OnCare	New feature to display announcements	40

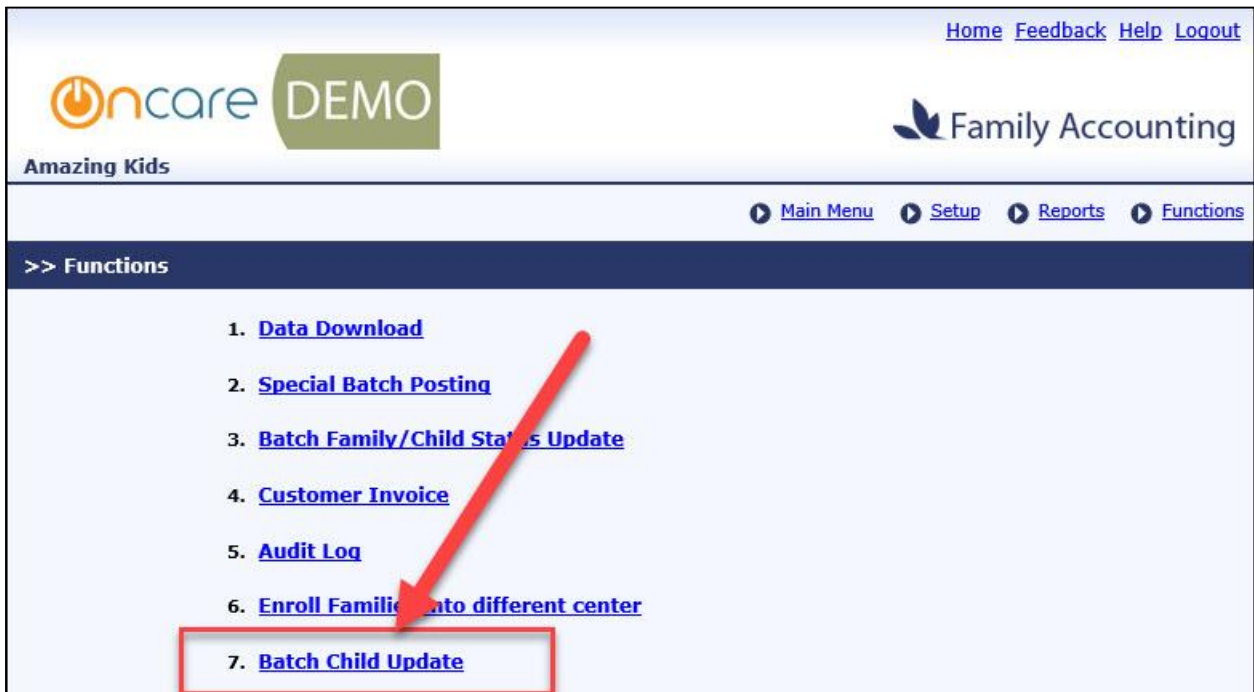
System Admin Features:

#	Type	Module	Description	Pg
12.	New	System Admin	Users can be mapped for ChildCareIRiS	42
13.	New	System Admin	External App details can be configured for a company	44
14.	New	System Admin	New center level configurations	45

1. **New:** Batch Child Update

This new feature helps to update the child classroom, age group and billing box in batch.
This is available under the function menu.

Access Path: Family Accounting → Functions → Batch Child Update



Update Classroom

This feature enables the user to update the classroom of the child(ren) in batch.

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OnCare DEMO

Sandbox Boston

Family Accounting

Main Menu Setup Reports Functions

>> Update Classroom

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Select Classroom

Select Classroom Select Here...

Submit

Select the classroom from which you want to move the children

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Family Accounting

Main Menu Setup Reports Functions

>> Update Classroom

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New Classroom to Assign

Select New Classroom to Assign Toddler

Select Child

No.	<input type="checkbox"/>	Child Name	Date Of Birth	Enrollment Start Date
1	<input checked="" type="checkbox"/>	Bennett VanGilder	05/14/2008	
2	<input checked="" type="checkbox"/>	Caleb Price	05/12/2009	
3	<input type="checkbox"/>	Diana Spence	12/16/2007	

Select the children who have to be moved to the selected classroom

Next

Select the classroom to which the children have to be moved

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>> Update Classroom

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New Classroom to Assign Toddler

No.	Child Name	Date Of Birth	Enrollment Start Date
1	Bennett VanGilder	05/14/2008	
2	Caleb Price	05/12/2009	

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Click **Submit** in the above screen and confirm the update.

Update Age Group

This feature enables the user to update the age group of the child(ren) in batch.

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Sandbox Boston

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>> Update Age Group

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Select Age Group

Select Age Group

Select Here...

Select the age group from which you want to move the children

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>> Update Age Group

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New Age Group to Assign

Select New Age Group to Assign: Pre-Kindergarten

Select the age group to which the children have to be moved

Select Child

No.	<input checked="" type="checkbox"/>	Child Name	Date Of Birth	Enrollment Start Date
1	<input checked="" type="checkbox"/>	Birdie Smoot	03/20/2009	
2	<input checked="" type="checkbox"/>	Caleb Price	05/12/2009	
3	<input checked="" type="checkbox"/>	Caroline Young	02/12/2009	


Select the children who have to be moved to the selected age group

Next

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>> Update Age Group

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New Age Group to Assign Pre-Kindergarten

No.	Child Name	Date Of Birth	Enrollment Start Date
1	Birdie Smoot	03/20/2009	
2	Caleb Price	05/12/2009	
3	Caroline Young	02/12/2009	

Submit

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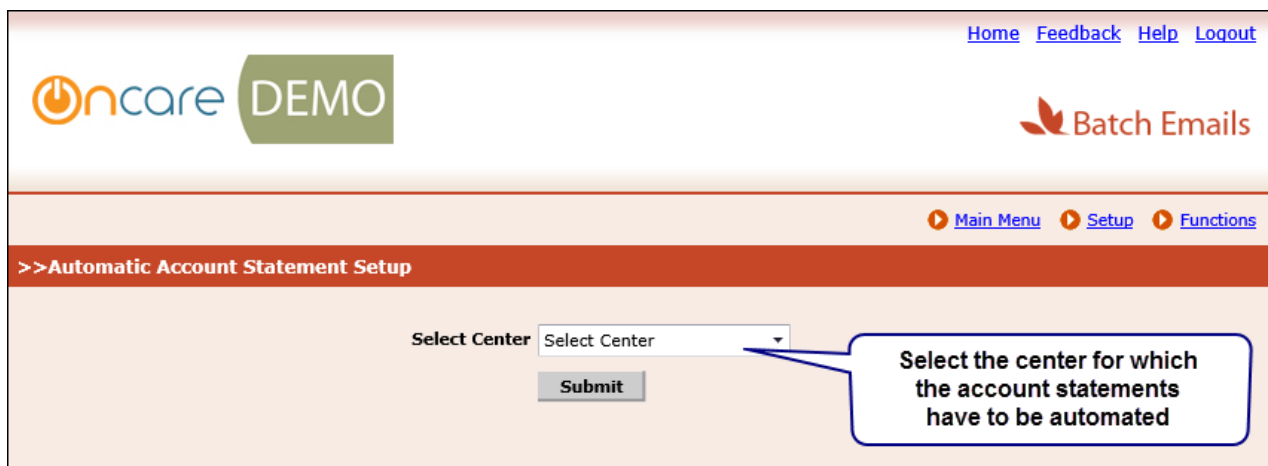
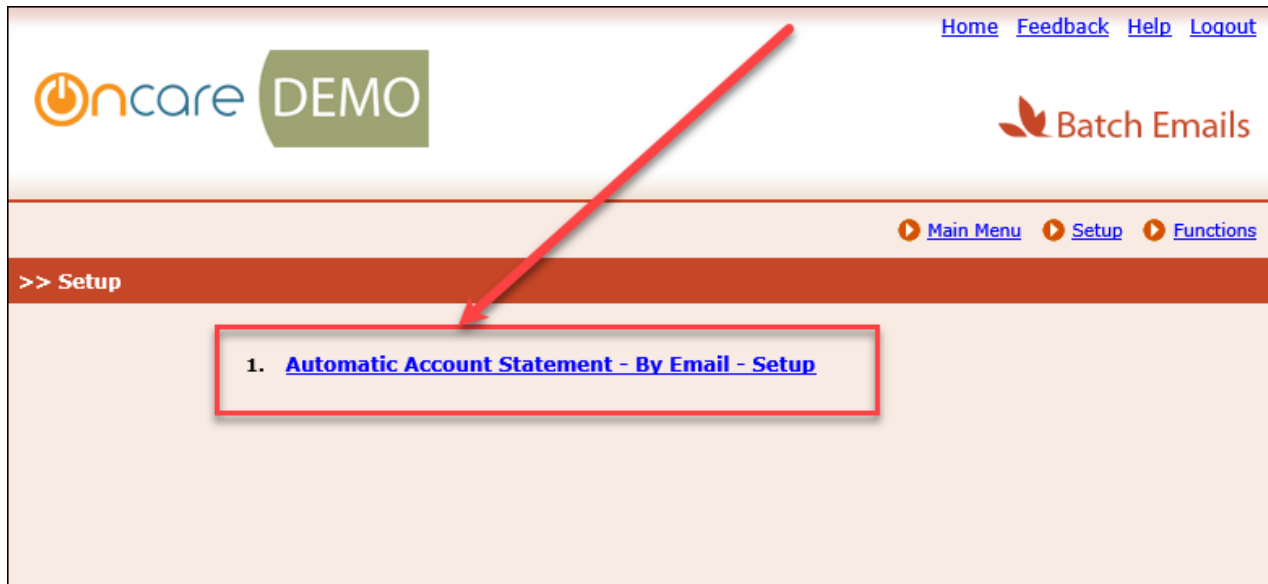
Today: April 5, 2017

Click **Submit** in the above screen and confirm the update.



2. **New:** Account Statement – Automatically

This feature enables the user to schedule and send the family account statements automatically. This is available in the Setup Menu of Batch Emails module.

Access Path: Batch Emails → Setup



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>>Automatic Account Statement Setup

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[View History](#)

Account Statement

Send Account Statement Automatically ☒ Yes ☐ No

Statement Frequency Monthly

Select Date 28

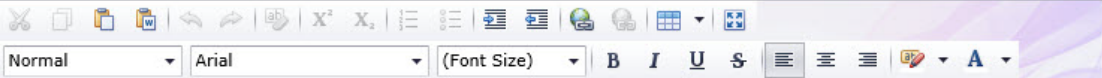
Select 'Yes' to automate the account statement email and select the frequency and date/day

Mail Template

From Amazing Kids

Subject Your latest Account Statement from Amazing Kids

Message



In this email you will find the latest Account statement. If you have any questions, please feel free to call me at 345-588-7567 or email at adam@oncare3.com.

Thanks
Amazing Kids

Save

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Click **Save** to save the changes. The account statement will be automatically sent to the parents on the selected date/day. The period of statement will be:

- **Monthly** – If Frequency is 'Monthly' then the statement will be generated for exact one month till the scheduled date i.e. if the scheduled date is 28 then on April 28th the statement will be generated for from 27th March to 28th April.
- **Weekly** – If Frequency is 'Weekly' then the statement will be generated for exact 7 days till the scheduled day i.e. if the scheduled day is Wednesday then the statement will be generated from the previous week Thursday till this Wednesday.

3. New: Manage Centers

This feature is available to the Company Super User role, under Administrative Functions. The Company Super Users can now manage the center details here.

Access Path: Administrative Functions → Manage Centers



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OnCare DEMO

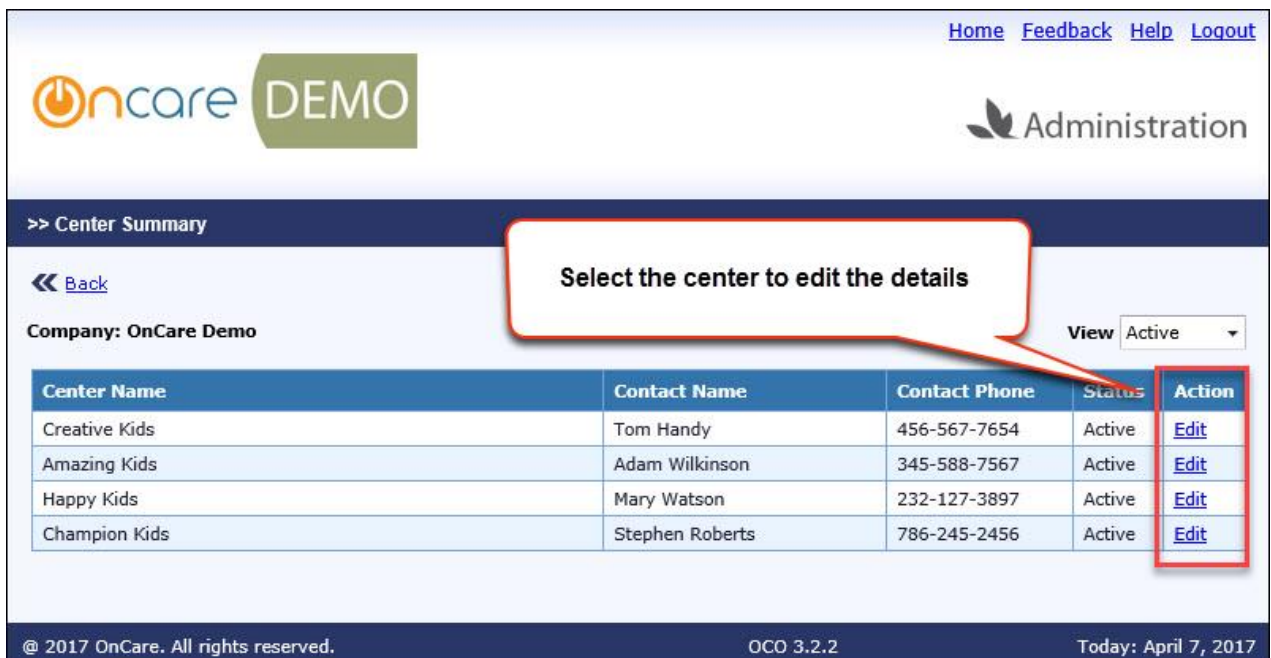
Administrative Functions

Manage Users

- [Manage Users](#)
- [Manage Centers](#)

Family Accounting

- [Search Across Centers](#)
- [Add /Edit GL Account](#)
- [Edit Billing Setup](#)



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OnCare DEMO

Administration

>> Center Summary

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Company: OnCare Demo

View Active ▾

Center Name	Contact Name	Contact Phone	Status	Action
Creative Kids	Tom Handy	456-567-7654	Active	Edit
Amazing Kids	Adam Wilkinson	345-588-7567	Active	Edit
Happy Kids	Mary Watson	232-127-3897	Active	Edit
Champion Kids	Stephen Roberts	786-245-2456	Active	Edit

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>> Center Setup

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Center Information



Company ID 1429

* Location Name

Address

City

State

Zip

Time Zone

Program Hours From To

Location ID 1

Status ☒ Active ☐ Inactive

Location Number

Regional ID

Accounting ID

Location Tax ID

License Capacity

Center Director Information


* First Name

Title

Phone

* Last Name

* Email

Fax

Save

4. New: Immunization Exemption at Dosage level

This option enables to exempt the immunization at dosage level. User can choose the relevant dosage and mark it as exempted with specific reason.

Access Path: Family Accounting → Setup → Immunization Setup

To enable this feature, select the 'Dosage Exemption' option as 'Yes' in the Immunization Setup page.

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Family Accounting

Sandbox Boston

Menu Setup Reports Functions

>> Immunization Setup

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Dosage Exemption Reason Setup

There are two methods how immunization data is captured and tracked in Oncare. Please select the method that applies best to your center.

☒ **Detailed Immunization Date**
Capture and track all the dates for each required immunization.

☐ **Immunization Expiration Date Only**
Capture and track only one active expiration date only. (For state like FL)

Submit

The default immunization is based on national description, months, status and display order. You can customize the immunization to meet your local needs by changing the description, months, status and display order.

Dosage Exemption Yes

Select this as 'Yes' to enable the dosage level exemption feature in the Child Info page.

Add New

View Active (A)

Immunization/ Vaccination	1st (in months)	2nd (in months)	3rd (in months)	4th (in months)	5th (in months)	6th (in months)	7th (in months)	Status	Display Order	Action
DTP	2 - 2	4 - 4	6 - 6	15 - 18	48 - 72			A	▲ ▼	Edit
POLIO	2 - 2	4 - 4	6 - 18	48 - 72				A	▲ ▼	Edit
MMR	12 - 15							A	▲ ▼	Edit
HIBMENI	2 - 2	4 - 4	6 - 6	12 - 15				A	▲ ▼	Edit
VARCEL	12 - 15							A	▲ ▼	Edit
TB								A	▲ ▼	Edit
Pneumococcal (State specific)	2 - 2	4 - 4	6 - 6	12 - 15				A	▲ ▼	Edit
Hepatitis A vaccine (HAV)	12 - 15	15 - 18						A	▲ ▼	Edit
Hepatitis B vaccine	0 - 0	2 - 2	15 - 18					A	▲ ▼	Edit
Rotavirus	2 - 2	4 - 4						A	▲ ▼	Edit
Influenza	6 - 72							A	▲ ▼	Edit

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Immunization and Physical Examination Information

☐ Fully Exempted (Check this if the child is fully exempted from all immunization. When check, table below will be hidden) [Immunization Setup](#)

☒ Show Immunization Missing

Please enter the immunization date or select an exemption for individual dosage

Immunization / Vaccination	1st	2nd	3rd	4th
DTP	Medical Exemp	Medical Exemp	Medical Exemp	12/12/15
POLIO	Medical Exemp	Medical Exemp	12/12/2015	
MMR	Medical Exemp			
VARCEL	Medical Exemp			
Hep B	12/12/2013	12/12/2014	12/12/2015	
HIB	Medical Exemp	Medical Exemp	Medical Exemp	12/12/2015
Hepatitis A vaccine (HAV)				
TB				
HEBB				
Rotavirus				
Influenza				
Meningococcal				
Human Papillomavirus				

Last Physical Health Exam Date

Next Physical Health Exam Date

Enter the Immunization date or choose from the available exemption reason.

The individual dosage columns will display the 'Dosage Exemption Reasons'. User can select one of them if that dosage is exempted for the child. Or can enter the date of dosage.

Add Dosage Exemption Reason

To add the dosage exemption reason, click 'Dosage Exemption Reason Setup' in the Immunization Setup page.

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oncare DEMO

Sandbox Boston

Family Accounting

Menu Setup Reports Functions

>> Immunization Setup

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[Dosage Exemption Reason Setup](#)

There are two methods how immunization data is captured and tracked in Oncare. Please select the method that applies best to your center.

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>> Dosage Exemption Reason Setup


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[Add New](#)


No.	Dosage Exemption Reason	Action
1	Religious Exemption	Edit
2	Medical Exemption	Edit

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Click Add New or Edit to add or edit the dosage exemption reason.

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Amazing Kids

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>> Dosage Exemption Reason Setup

[<< Back](#)
[Add New](#)

No.	Dosage Exemption Reason	Action
1	Religious Exemption	Edit
2	Medical Exemption	Edit

Add/Edit Dosage Exemption Reason
✕

Dosage Exemption Reason


Save
Cancel

Impacted Reports:

1. Child Immunization / Physical Health Exam Report:

- Immunization History Report

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Company Name : Oncare Demo Company
Center Name : Sandbox Boston


Immunization History Report

Classroom Name : Kidergarden

Child Name	DTP	POLIO	MMR	HIBMENI	VARCEL	TB	Pneumococcal (State specific)	Hepatitis A vaccine (HAV)	Hepatitis B vaccine	Rotavirus	Influenza	Meningococcal	Human Papillomavirus
Marley Adams 12/10/2007 9 Years - 3 Months	Medical Exemption Medical Exemption 12/12/2017			Religious Exemption			Medical Exemption						

- Immunization Missing Report - The exempted dosages will not be shown in the Immunization Due section of this report.

Page 1



Company Name : Oncare Demo Company
Center Name : Sandbox Boston

Immunization Missing Report

Classroom Name : Kidergarden

Child's Name	Child's DOB	Child's Age	Immunization Due
Marley Adams	12/10/2007	9 Years - 3 Months	DTP 4th DTP 5th POLIO 1st POLIO 2nd POLIO 3rd POLIO 4th MMR 1st HIBMENI 1st HIBMENI 2nd HIBMENI 4th VARCEL 1st Pneumococcal (State specific) 1st Pneumococcal (State specific) 3rd Pneumococcal (State specific) 4th Hepatitis A vaccine (HAV) 1st Hepatitis A vaccine (HAV) 2nd Hepatitis B vaccine 1st Hepatitis B vaccine 2nd Hepatitis B vaccine 3rd Rotavirus 1st Rotavirus 2nd Influenza 1st

2. Family Information Sheet

Allergy / Medication / Special Diets	
Allergies :	
Additional Information	
IFSP : No	IFSP Creation Date :
Child Immunizations	
Immunization Name	Dose Dates
Pneumococcal (State specific)	Medical Exemption
HIBMENI	Religious Exemption
DTP	12/12/2017, Medical Exemption, Medical Exemption

5. New: Immunization Due Reminder Email

This feature has been enhanced to send reminder email to the parents on the immunization due also along with the existing physical health exam expiration reminder.

Access Path: Batch Emails → Send Email Reminder

The screenshot shows the OnCare DEMO web application interface. At the top, there is a header with the OnCare logo and 'DEMO' text. To the right of the header are links for Home, Feedback, Help, and Logout. Below the header, there is a navigation bar with a 'Batch Emails' link and a 'Send Email Reminder' button. The main content area is titled '>> Select Families'. It features a dropdown menu labeled 'Select' with 'Immunization Due Reminder' selected. Below the dropdown are two radio buttons: 'Immunization due as of this Assessment Date' (selected) and 'Immunization Missing'. There is a date input field next to the first radio button. At the bottom of the form are 'Submit' and 'Back' buttons. The footer contains copyright information: '@ 2017 OnCare. All rights reserved.', version 'OCO 3.2.2', and the date 'Today: April 10, 2017'.

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Send Email Reminder

[Main Menu](#)
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>> Select Families

Select

Immunization Due Reminder

☐ Immunization due as of this Assessment Date

☒ Immunization Missing

Submit

Back



No.	Sel.	Family Acct Key	First Name	Last Name	Type	Child First Name	Email
1	<input type="checkbox"/>	NOAH	Sam	Noah	parent #1	Adam	noah@gmail.com
2	<input type="checkbox"/>	ANDREW	Joe	Andrew	parent #1	Mary	adrew@hotmail.com
3	<input type="checkbox"/>	CAMPBELL	George	Campbell	parent #1	Frank	geo@beyonduniverse.in

Download Reminder in PDF to Print

Send Reminder via Email

User can **Download** the Immunization Reminder Letter for printing and or **Send the reminder via email** to the selected families.

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[Send Mail](#) [Main Menu](#) [Setup](#) [Functions](#)

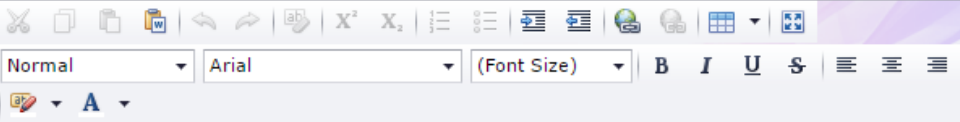
>> Compose Message and Send

[Back](#)

FromSandbox Boston

SubjectYour child immunization Due reminder

Message



This is a reminder that your child have immunization due.

Please provide us the updated immunization details as soon as you have it.

Please let me know if you have any questions.

Regards

Prem

☐ Restore original reminder message text

Review

Clear


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Compose the message and click **Review** to continue sending the email.

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Sandbox Boston

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Send Mail
Review Message

[<< Back](#)

Note: It might take up to 2 hours for emails to be generated and sent to families. Thanks for your patience.

Message

Subject: Your child immunization Due reminder

This is a reminder that your child have immunization due.
 Please provide us the updated immunization details as soon as you have it.
 Please let me know if you have any questions.
 Regards
 Prem

Contact Name	Action
George Campbell	Review Attachment
Joe Andrew	Review Attachment

Send
Cancel

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1. Click 'Review Attachment' against the relevant contact to review the attachment before sending.
2. Click **Send** to send the reminder email.

Sample PDF:



6. New: TAP/TPD Payment Receipt

Payment Receipt Email:

This is a new feature that generates the payment receipt and send email to the respective parent. This is auto generated when the automatic payment is charged.

Parent Portal:

The parents can also view the receipts from the Parent Portal.

Access Path: Parent Portal → Manage TAP settings

The screenshot displays the OnCare DEMO Parent Portal interface. At the top, there are links for Home, Feedback, and Logout. The main header includes the OnCare logo and 'Sandbox Boston'. The navigation bar shows '>> Manage Tuition Auto Pay (TAP)'. Below this, there are links for 'Update Payment Percentage' and 'Disenroll TAP'. A table lists funding accounts with columns for Funding Account Name, Account Holder Name, Date Enrolled, Account/Card Number, Payment Type, Payment Percentage, and Action. Two accounts are listed: 'Lila' and '2nd account', both with a 50% payment percentage. Below this table, another table shows transaction details with columns for Transaction Date, Payment Amount, Payment Status, and Receipt. Four transactions are listed, with the 'Receipt' column containing 'View' links. A red box highlights the 'Receipt' column, and a callout bubble points to it with the text 'Click the respective receipt to view it'. The footer contains copyright information, version number (OCO 3.2.2), and the date (Today: April 10, 2017).

Funding Account Name	Account Holder Name	Date Enrolled	Account/Card Number	Payment Type	Payment Percentage	Action
Lila	Lila Sites	03/26/2017	XXXXXXXXXX	Card	50%	Replace Edit
2nd account	Lila Sites	03/27/2017	XXXXXXXXXX	Card	50%	Replace Edit

Transaction Date	Payment Amount	Payment Status	Receipt
03/27/2017	\$ 189.41	Refunded	View
03/27/2017	\$ 189.41	Settled	View
03/26/2017	\$ 71.40	Refunded	
03/26/2017	\$ 200.01	Settled	View

(Page 1 of 1) 1

Click the respective receipt to view it

To enable this feature please contact support@oncarecloud.com.

7. New: Payment Refund

This feature helps the user to refund the following payment transactions:

- TAP
- TPD
- CSP

Access Path: Family Accounting → Online Tuition Payment → Refund Amount/Apply Credit

The screenshot shows the Oncare DEMO Family Accounting interface. The top navigation bar includes links for Home, Feedback, Help, and Logout. The main header displays the Oncare DEMO logo and the text 'Sandbox Boston' and 'Family Accounting'. Below the header, there is a navigation menu with links for Main Menu, Setup, Reports, and Functions. The main content area is titled '>> Online Tuition Payment'. It contains three sections: Tuition Auto Pay (TAP), Tuition Pay Direct (TPD), and Card Swipe Payment (CSP). A red arrow points from the 'Online Tuition Payment' header to the 'Refund Amount/Apply Credit' link in the 'Online Tuition Payment Enrollment' section.

Tuition Auto Pay (TAP)
TAP allows the Director to have total control over the tuition payment online.

1. [Process TAP Payment based on Ledger Balance](#)
2. [Review Status of Submitted TAP Payment](#)

Tuition Pay Direct (TPD)
TPD provides the parents the option to pay their tuition online. Director can review payment status and remind parents to pay on time.

3. [Review TPD Payment Status](#)

Card Swipe Payment (CSP)
CSP provides the Director the option to take payments from parents via a card reader.



4. [Process Card Swipe Payment](#)
5. [Review CSP Payment Status](#)

Enrollment Counter

Total Active Families	254
Total Active Families Enrolled in TAP	31
Total Active Families Enrolled in TPD	25
Total Active Families Not Enrolled	203

[Online Tuition Payment Enrollment](#)
[Refund Amount/Apply Credit](#)

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>>Refund Amount/Apply Credit

[<< Back](#)

Search Criteria

Select Family

CAMPBELL

Start Date

03/01/2017

End Date



03/31/2017

Submit

Select the relevant family and payment period

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>>Refund Amount/Apply Credit

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Search Criteria

Family Account Key

CAMPBELL

Parent 1 Name

George Campbell

Parent 2 Name

Camila Campbell

Child Name

Amy Campbell

No.	Posting Date	Reference Id	Description	Comments	Payment	Action
1	03/10/2017	B08400005105	TAP Card Payment	B08400005105 - Processed	\$120.00	Refund
2	03/31/2017	B10500005211	TAP Card Payment	B10500005211 - Processed	\$150.00	Refund
					\$270.00	

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Family Accounting

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>>Refund Amount/Apply Credit

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Search Criteria

Family Account Key: CAMPBELL

No.	Posting	
1	03/10/2017	B08400005105
2	03/31/2017	B10500005211

Confirmation

Refund Details

Parent Name

Gerorge Campbell

Payment Method

Card

Payment Date

03/10/2017

Comments

B08400005105 - Processed

Amount to Refund

120.00

Refund

Cancel

Payment

Action

\$120.00

[Refund](#)

\$150.00

[Refund](#)

\$270.00

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On successful refund, a new transaction 'Payment Refund' will be posted with the refund amount and the reference number of original transaction will be displayed in the comments column.

To enable this feature, please contact support@oncarecloud.com.

8. New: Multiple Funding Account for Payor

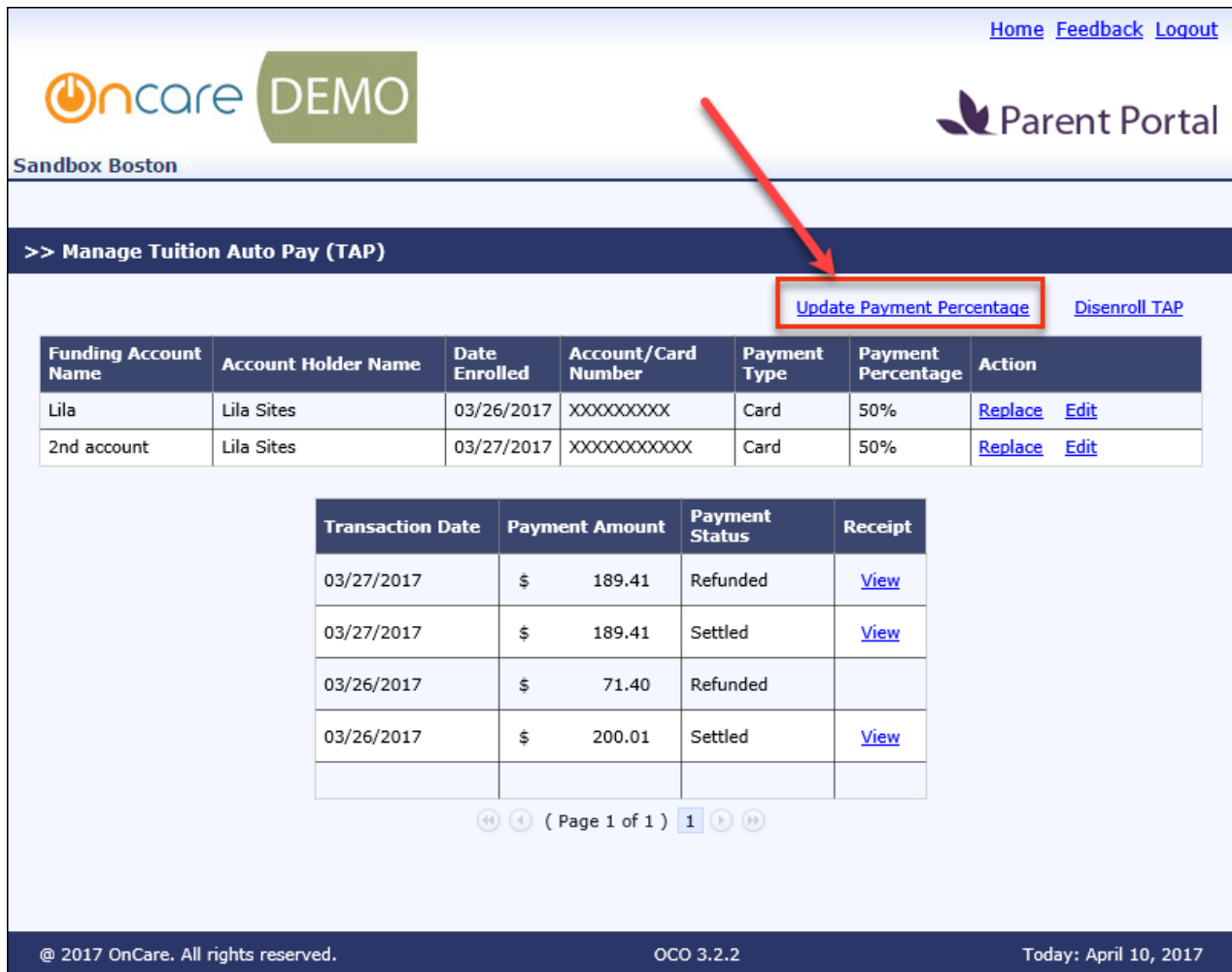
With this release, a payor can have multiple funding accounts.

A Payor can setup multiple funding accounts and set the payment percentage between the accounts.

TAP Accounts:

Below is the flow for the TAP accounts.

Access Path: Parent Portal → Manage TAP Settings



The screenshot shows the OnCare DEMO Parent Portal interface. At the top, there are links for Home, Feedback, and Logout. The main header includes the OnCare DEMO logo and the text 'Sandbox Boston'. The 'Parent Portal' logo is also visible. The main content area is titled '>> Manage Tuition Auto Pay (TAP)'. A red arrow points to a red-bordered box containing the link 'Update Payment Percentage'. To the right of this link is another link, 'Disenroll TAP'. Below these links is a table with the following data:



Funding Account Name	Account Holder Name	Date Enrolled	Account/Card Number	Payment Type	Payment Percentage	Action
Lila	Lila Sites	03/26/2017	XXXXXXXXXX	Card	50%	Replace Edit
2nd account	Lila Sites	03/27/2017	XXXXXXXXXX	Card	50%	Replace Edit

Below the table is another table showing transaction history:

Transaction Date	Payment Amount	Payment Status	Receipt
03/27/2017	\$ 189.41	Refunded	View
03/27/2017	\$ 189.41	Settled	View
03/26/2017	\$ 71.40	Refunded	
03/26/2017	\$ 200.01	Settled	View

At the bottom of the page, there is a footer with the text: '@ 2017 OnCare. All rights reserved. OCO 3.2.2 Today: April 10, 2017'. The page number '1' is displayed in the center of the footer.

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Sandbox Boston



>> Manage Tuition Auto Pay (TAP)

No.	Funding Account Name	Payment Type	Payment Percentage
1	Lila	Card	50%
2	2nd account	Card	50%

Click Edit to set the payment percentage for the respective funding accounts

EditBack

[Home](#) [Feedback](#) [Logout](#)



Sandbox Boston

>> Manage Tuition Auto Pay (TAP)

No.	Funding Account Name	Payment Type	Payment Percentage
1	Lila	Card	<input type="text" value="75%"/>
2	2nd account	Card	<input type="text" value="25%"/>

SaveCancel


Update the payment % and click Save

TPD Accounts:

Below is the flow for the TPD accounts.

Access Path: Parent Portal → Manage Tuition Pay Direct (TPD)

HomeFeedbackLogout



Parent Portal

Sandbox Boston

>> Manage Tuition Pay Direct (TPD)

Click this to Add new funding account

Following are the functions available to manage your Tuition Pay Direct (TPD) account:

[Disenroll TPD](#)[Add New Funding Account](#)

No.	Funding Account Name	Account Holder Name	Date Enrolled	Account/ Card Number	Payment Type	Payment Percentage	Action
1	Sophiya_1st card	Sophia Rojo	04/11/2017	XXXXXXXXXX	Card	75%	Replace Edit
2	Sophiya_2nd card	Sophia Rojo	04/11/2017	XXXXXXXXXX	ACH	25%	Replace

Last Payment Date 04/10/2017

Last Payment Amount \$ 15.00

Ledger Balance \$90.00

[Make One Time Payment](#)

Click here to manage the payment percentage

Next Schedule payment Date 04/12/2017



[Manage Recurring Payment Schedule](#)

Transaction Date	Payment Amount	Payment Status	Receipt
04/10/2017	\$ 10.00	Settled	View

(Page 1 of 1) 1

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[Home](#) [Feedback](#) [Logout](#)

Sandbox Boston

>> TPD - Manage Recurring Payment Schedule

[<< Back](#)

Family Account Key NANCY

Parents Name Nancy Frias,
Sophia Rojo

Child(ren) Name

[Update Payment Percentage](#)

No.	Funding Account Name	Account Holder Name	Date Enrolled	Account/ Card Number	Payment Type	Payment Percentage
1	Sophiya_1st card	Sophia Rojo	04/11/2017	XXXXXXXXXX	Card	75%
2	Sophiya_2nd card	Sophia Rojo	04/11/2017	XXXXXXXXXX	ACH	25%

Following is the active recurring payment schedule you have setup :



Frequency	Recurring On	Start Date	End Date	Last Payment Date	Next Payment Date	Action
Monthly	12th	04/11/2017		04/10/2017	04/12/2017	Edit Delete

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OCO 3.2.2

Today: April 11, 2017

[Home](#) [Feedback](#) [Logout](#)

Sandbox Boston

>> TPD - Manage Recurring Payment Schedule



No.	Funding Account Name	Payment Type	Payment Percentage
1	Sophiya_1st card	Card	75%
2	Sophiya_2nd card	ACH	25%

Click Edit to set the payment percentage of respective funding accounts

Edit

Back

[Home](#) [Feedback](#) [Logout](#)



Sandbox Boston

>> TPD - Manage Recurring Payment Schedule

No.	Funding Account Name	Payment Type	Payment Percentage
1	Sophiya_1st card	Card	<input type="text" value="75%"/>
2	Sophiya_2nd card	ACH	<input type="text" value="25%"/>

Update the payment % and click Save

To enable this feature, please contact support@oncarecloud.com.

9. New: Online Forms Module

This new module enables to the user to upload and view any forms. This can be enabled only for the companies configured for Parent Portal.

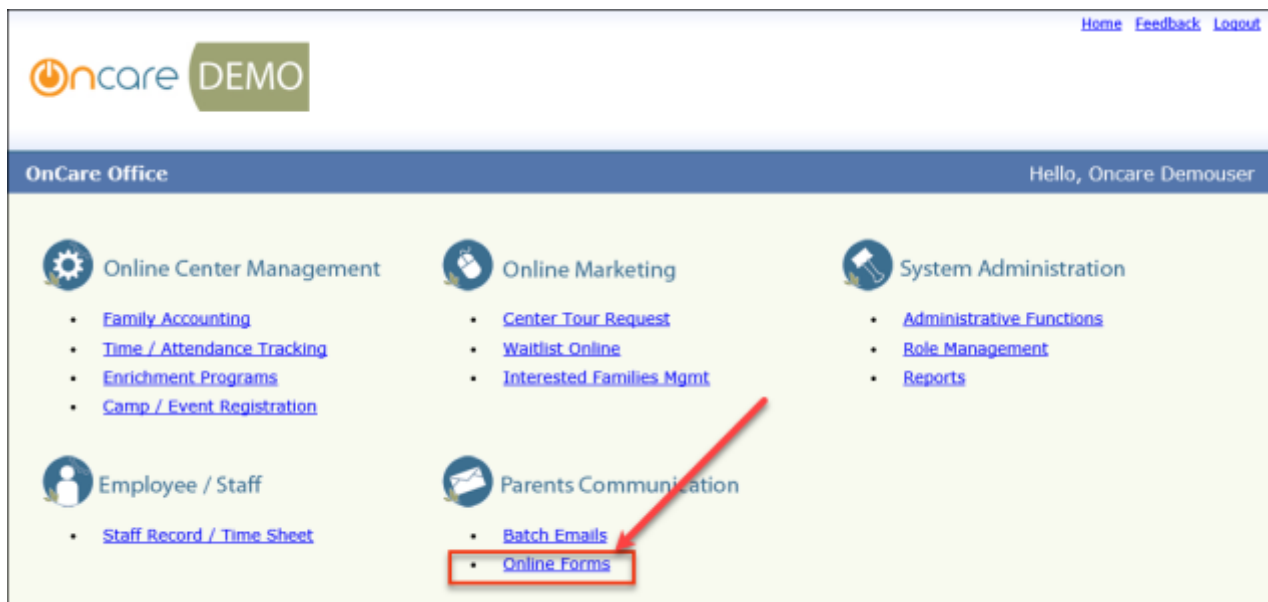
This feature is available for the following roles:

- Company Super User
- Company Admin
- Location Directors
- Parents

Note:

1. Forms uploaded by the Company super user/admin will be available for all the location in that company.
2. Forms uploaded by the Location directors will be available only for that location.
3. Forms uploaded by parents can be viewed only by the Location directors of that location.

Access Path: Home → Online Forms



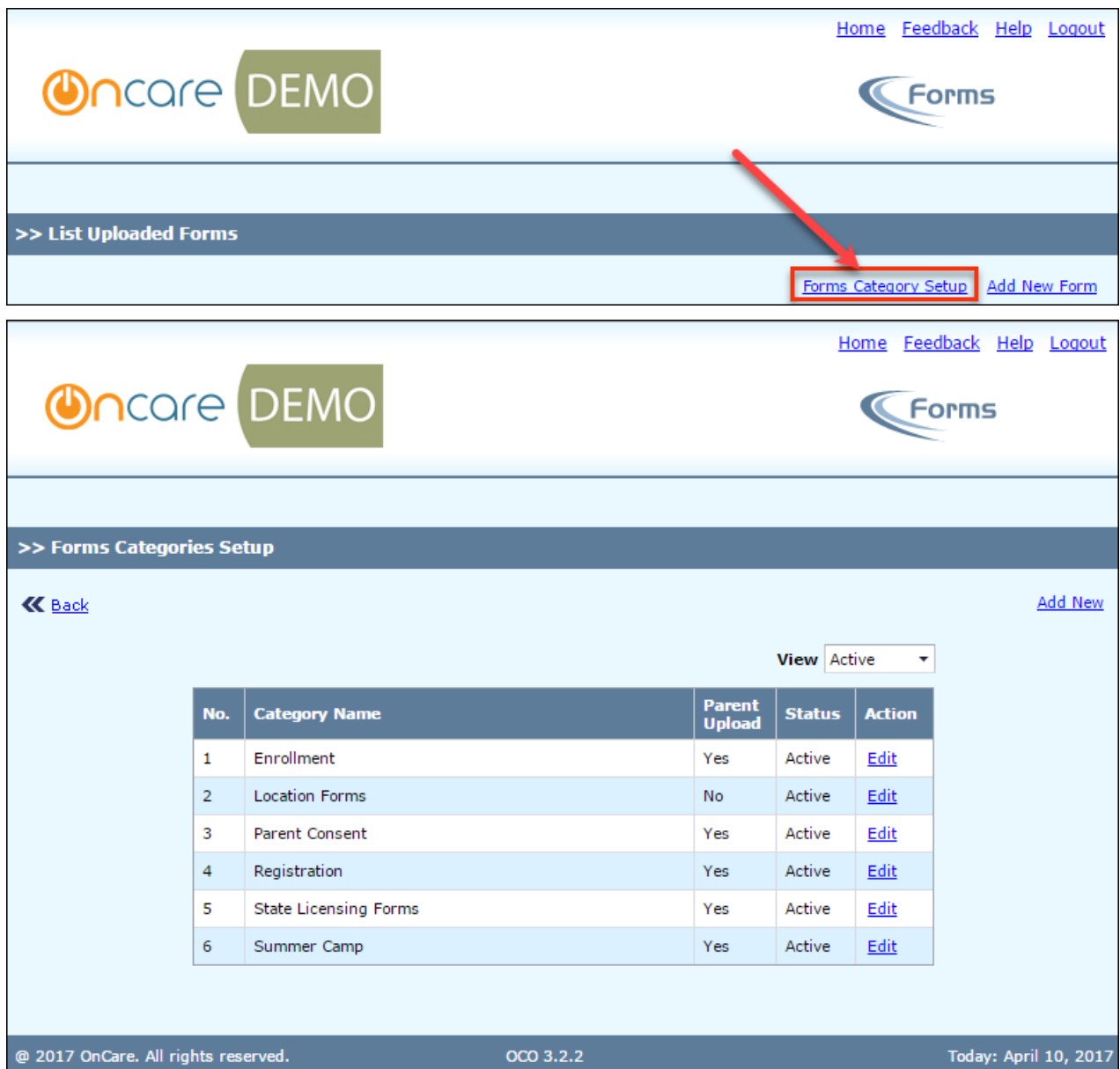
Company Super User/Company Admin:

These users can perform the following tasks in this module:

- Upload Forms
- View Forms (Parent uploaded forms cannot be viewed)
- Edit Forms
- Setup Forms Category

Category Setup:

To setup the category, click 'Forms Category Setup' in the Forms list page:



The screenshot shows the OnCare Forms module interface. The top navigation bar includes links for Home, Feedback, Help, and Logout. The main header displays the OnCare DEMO logo and the Forms module title. Below the header, there is a section for 'List Uploaded Forms' with a link to 'Forms Category Setup' (highlighted with a red box and a red arrow) and a link to 'Add New Form'.



The 'Forms Categories Setup' page is shown below, featuring a 'Back' link and an 'Add New' link. A table lists the existing categories, and a 'View' dropdown menu is set to 'Active'.

No.	Category Name	Parent Upload	Status	Action
1	Enrollment	Yes	Active	Edit
2	Location Forms	No	Active	Edit
3	Parent Consent	Yes	Active	Edit
4	Registration	Yes	Active	Edit
5	State Licensing Forms	Yes	Active	Edit
6	Summer Camp	Yes	Active	Edit

The footer of the page contains the copyright information: © 2017 OnCare. All rights reserved. The version number is OCO 3.2.2, and the date is Today: April 10, 2017.

Click 'Add New' or 'Edit' to add a new category or edit the existing category.

[Home](#)
[Feedback](#)
[Help](#)
[Logout](#)

[Forms Categories Setup](#)

[Back](#)
[Add New](#)

Add / Edit Form Category

Category Name

Parent Upload
☐ Yes
☒ No

Status
Active

Save
Cancel

No.	Category	Parent Upload	Status	Action
1	Enrollment		Active	Edit
2	Location		Active	Edit
3	Parent Consent		Active	Edit
4	Registration		Active	Edit
5	State Licensing		Active	Edit
6	Summer Camp	Yes	Active	Edit

Enter the details and select if the parent can upload forms of this category.

[Home](#)
[Feedback](#)
[Help](#)
[Logout](#)




[List Uploaded Forms](#)

[Forms Category Setup](#)
[Add New Form](#)

View
Active

No.	Category	Form Name	Status	Action
1	Registration	2017 Enrollment Registration	Active	Edit View
2	Location Forms	Find Our Locations	Active	Edit View
3	Enrollment	Summer Camp Enrollment	Active	Edit View
4	State Licensing Forms	Licensing Forms	Active	Edit View
5	Enrollment	Center Enrollment	Active	Edit View
6	Parent Consent	Sunscreen Application Form	Active	Edit View

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Today: April 10, 2017

Upload Forms:

Click 'Add New Form' in the Forms list page.



The screenshot shows the OnCare DEMO interface. At the top right, there are links for [Home](#), [Feedback](#), [Help](#), and [Logout](#). The main header features the OnCare DEMO logo and a 'Forms' icon. Below the header, there is a navigation bar with a link to '>> List Uploaded Forms'. On the right side of this bar, there are two links: 'Forms Category Setup' and 'Add New Form'. The 'Add New Form' link is highlighted with a red box and a red arrow pointing to it.



The screenshot shows the 'Upload Form' page. At the top right, there are links for [Home](#), [Feedback](#), [Help](#), and [Logout](#). The main header features the OnCare DEMO logo and a 'Forms' icon. Below the header, there is a navigation bar with a link to '>> Upload Form'. On the left side of this bar, there is a link to '<< Back'. The main content area contains the following fields and controls:

- Form Name**: Text input field.
- Description**: Text input field.
- Forms Category**: Dropdown menu with 'Select Here...' as the current selection.
- Effective From**: Date input field.
- End Date**: Date input field.
- Status**: Dropdown menu with 'Active' as the current selection.
- Upload Form**: File input field with 'Select a file...' text and a 'Browse...' button.
- Note**: A red text note stating: 'Note: Allowed file types for the upload forms are pdf, doc, docx, txt, ppt, pptx, xls, xlsx, jpg, jpeg and png.'
- Applicable To**: Radio button group with 'All Centers' (selected) and 'Select Centers' options.
- Save**: A button at the bottom center.

At the bottom of the page, there is a footer with the following text:

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- OCO 3.2.2
- Today: April 10, 2017

1. Enter the form details and click **Browse**, to select a file to be uploaded.
2. Select whether it is applicable to all centers or specific center.
3. Click **Save** to upload the form.

View Forms:

The Company/location users can view the forms upload by them as well as the parents. To view the uploaded forms, click 'View' against the respective forms in the Forms View page and the form will be displayed.



The screenshot displays the OnCare Forms View page. At the top, there is a header with the OnCare logo and 'DEMO' text, and a 'Forms' logo. Navigation links for Home, Feedback, Help, and Logout are in the top right. Below the header, a section titled '>> List Uploaded Forms' contains a table of forms. Above the table, there are links for 'Forms Category Setup' and 'Add New Form', and a 'View' dropdown menu set to 'Active'. The table has columns for No., Category, Form Name, Status, and Action. The 'Action' column contains 'Edit' and 'View' links for each form. A red arrow points to the 'View' link for the first form, which is also enclosed in a red box.

No.	Category	Form Name	Status	Action
1	Registration	2017 Enrollment Registration	Active	Edit View
2	Location Forms	Find Our Locations	Active	Edit View
3	Enrollment	Summer Camp Enrollment	Active	Edit View
4	State Licensing Forms	Licensing Forms	Active	Edit View
5	Enrollment	Center Enrollment	Active	Edit View
6	Parent Consent	Sunscreen Application Form	Active	Edit View

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Edit Forms:

The company/location users can also edit the uploaded forms. To edit the forms, click 'Edit' in the Forms view page:



[Home](#) [Feedback](#) [Help](#) [Logout](#)



>> List Uploaded Forms

[Forms Category Setup](#) [Add New Form](#)

View Active

No.	Category	Form Name	Status	Action
1	Registration	2017 Enrollment Registration	Active	Edit View
2	Location Forms	Find Our Locations	Active	Edit View
3	Enrollment	Summer Camp Enrollment	Active	Edit View
4	State Licensing Forms	Licensing Forms	Active	Edit View
5	Enrollment	Center Enrollment	Active	Edit View
6	Parent Consent	Sunscreen Application Form	Active	Edit View

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Today: April 10, 2017

>> Upload Form

[Back](#)

Form Name

Description

Forms Category

Effective From

End Date

Status

Upload Form [Browse...](#)

[View Uploaded File](#)

Note: Allowed file types for the upload forms are pdf, doc, docx, txt, ppt, pptx, xls, xlsx, jpg, jpeg and png.

Applicable To ☒ All Centers ☐ Select Centers

[Save](#)

Make the necessary changes and click Save.

Location Directors:

These users can perform the following tasks in this module:

- Upload Forms
- View Forms
- Edit Forms

The Location directors can view forms uploaded by company super user/admin as well as the parents:

Home Feedback Help Logout

oncare DEMO

Sandbox Boston

>> List Uploaded Forms

[Parent Uploaded Forms](#) [Add New Form](#)

View Active

No.	Category	Form Name	Status	Action
1	Registration	Location forms	Active	View
2	Registration	Oncare Form	Active	View
3	Location Forms	Universal Form	Active	View
4	Location Forms	Boston Information	Active	Edit View

Home Feedback Help Logout

oncare DEMO

Sandbox Boston

>> View Forms

[Back](#)

Search Criteria

Select Category Registration

Start Date 04/03/2017

End Date 04/13/2017

Submit

Center Name Sandbox Boston Category Name Registration

Start Date 04/03/2017 End Date 04/13/2017

No.	Family Acct Key	Parent 1 Name	Parent 2 Name	Category	Form Name	Uploaded On	Action
1	SAM	Sam Anderson	Mary Anderson	Registration	Sandbox Boston	4/4/2017	View

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Parents:

Access Path: Parent Portal → View Forms/Upload Form

Home Feedback Logout

OnCare DEMO

Sandbox Boston

>> Home

Tuition Payment
Save time, never have to worry about paying late fees again.
[Manage TAP Settings](#)

Documents
[View Forms](#)
[Upload Form](#)
[Download Family Information Sheet](#)

Parents can upload and view the forms uploaded by them.

Upload Forms:

To upload forms, click 'Upload Forms' in the Home page:

Home Feedback Logout

OnCare DEMO

Sandbox Boston

>> Upload Form

[Back](#)

Name

Description

Forms Category

Upload Form [Browse...](#)

Note: Allowed file types for the upload forms are pdf, doc, docx, txt, ppt, pptx, xls, xlsx, jpg, jpeg and png.

[Submit](#)

Uploaded Forms

No.	Category	Form Name	Description	View
1	Summer Camp	Summer Camp Enrollment	Enrollment 2017	View



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1. Enter the form details and click **Browse**, to select a file to be uploaded.
2. Click **Save** to upload the form.

View Forms:

To View Forms, click 'View Forms' in the Home page:

[Home](#)
[Feedback](#)
[Logout](#)

Sandbox Boston

>> View Forms

[<< Back](#)

No.	Category	Form Name	Description	View
1	Registration	2017 Enrollment Registration	New Year Registration	2017 Enrollment
2	State Licensing Forms	Licensing Forms	LIC701, Physician's Report	LIC701, Physician's Report

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OCO 3.2.2

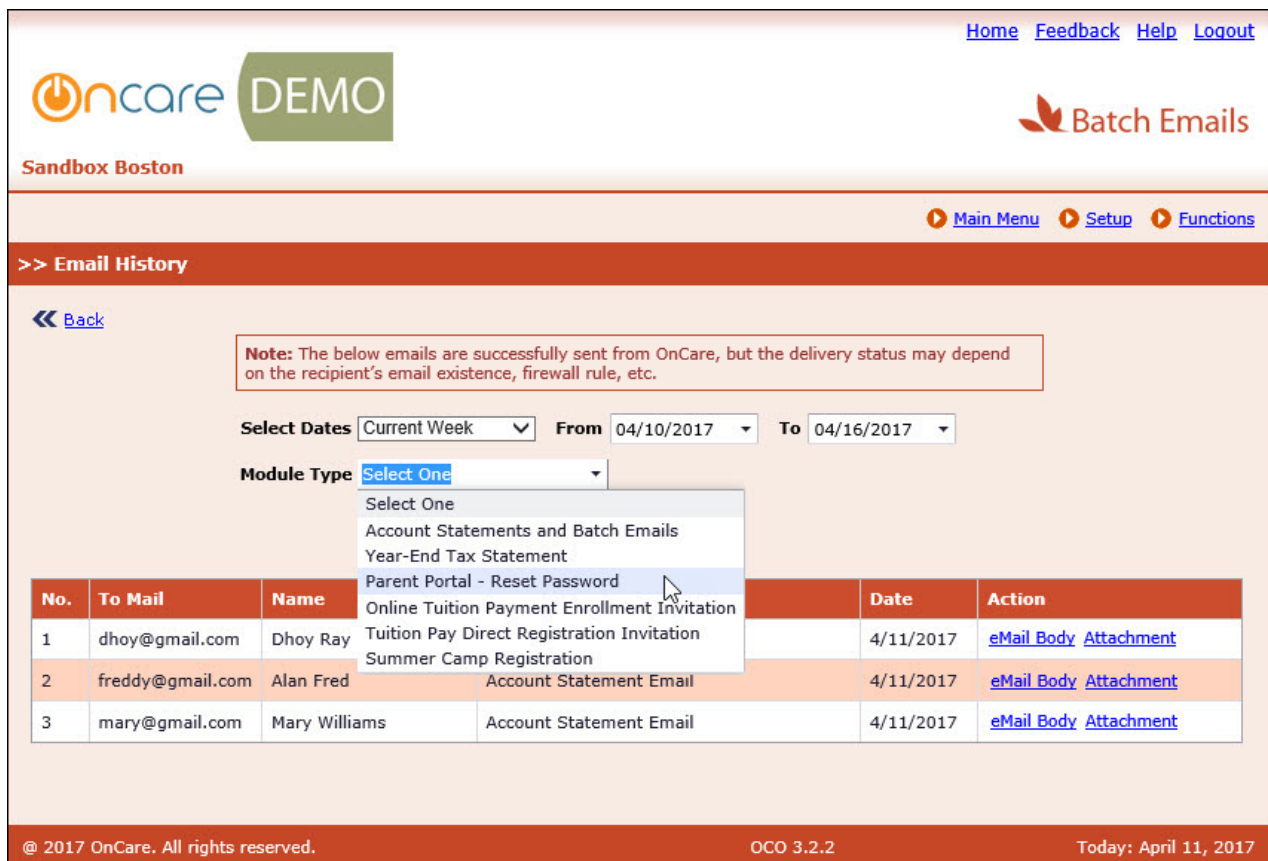
Today: April 10, 2017

Click on the respective forms to view it.

10. New: Batch Emails – Email History View

This new feature enables the user to view the history of emails sent under the respective types

Access Path: Batch Emails → Functions → Email History



1. Select the relevant period and module type for which you want to view the email history
2. Click **Submit** to view the history.

11. New: Discount on TAP/TPD Payments

Currently Company Super Users have the option to setup the service fee for the payments. Now in addition to that 'Discount' feature is introduced in this release.


This can be configured at Company level. So, a company can either have service fee or discounts.

The discount details will be in the Process TAP/Card Swipe/TPD payments page.

Access Path: Family Accounting → Online Tuition Payment → Process TAP Payment based on Ledger Balance

TAP Payment:

[Home](#) [Feedback](#) [Help](#) [Logout](#)

Sandbox Boston

[Main Menu](#) [Setup](#) [Reports](#) [Functions](#)

>> Process TAP ACH Payment

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

Following is a listing of TAP families with a ledger balance as of today (04/10/2017). 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. <input type="checkbox"/>	Family Acct Key	Payer	Ledger	Child Names	Ledger Balance	TAP Amt to Process (A)	Discount (B)	Total (A - B)	Action
1	<input type="checkbox"/>	ADAM	Adam Wilkinson	Sponsor	Sara	\$ 401.78	\$ 401.78	\$ 20.09	\$ 381.69	View Edit
2	<input type="checkbox"/>	ANDREW	John Andrew	Sponsor	Mary	\$ 140.00	\$ 140.00	\$ 7.00	\$ 133.00	View Edit
3	<input type="checkbox"/>	GEORGE	Dana George	Sponsor	Rachel, Steven	\$ 1,590.76	\$ 1,590.76	\$ 79.54	\$ 1,511.22	View Edit
Total									\$ 2,025.91	

[Back](#) [Next](#)

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The discount amount (based on the discount percentage configured) will be calculated for the TAP Amt to Process and displayed in the 'Discount (B)' column. Difference between the TAP amount and Discount will be displayed in the Total column.

Card Swipe Payments:

Access Path: Family Accounting → Online Tuition Payment → Process Card Swipe Payment

The screenshot displays the OnCare DEMO Family Accounting interface. The top navigation bar includes links for Home, Feedback, Help, and Logout. The main header shows the OnCare DEMO logo and the text 'Sandbox Boston'. Below this, a secondary navigation bar contains links for Main Menu, Setup, Reports, and Functions. The main content area is titled '>> Card Swipe Payment' and includes a '<< Back' link. The form contains the following fields and values:

Field	Value
Select Payer	HOLMAN
Parent Name	Shawn Holman
Child(ren)	Mark Holman
Ledger Balance Amount	\$1,414.76
Account Type	Credit Card
Amount to Process	\$1,414.76
Discount	\$35.37
Total Amount to Process	\$1,379.39

A red box highlights the 'Total Amount to Process' value of \$1,379.39. A callout box points to this value with the text: 'The Total amount to Process is the difference between 'Amount to Process' and 'Discount''. To the right of the total amount is a 'Change Amount' button. Below the total amount is a 'Ready to Swipe Card' button. The footer contains the text: '@ 2017 OnCare. All rights reserved.', 'OCO 3.2.2', and 'Today: April 11, 2017'.

TPD Payment:

Access Path: Parent Portal → Pay

>> TPD - One Time Payment

Family Account Key NANCY

Parents Name Nancy Frias,
Sophia Rojo

Child(ren) Name

You have selected to make an one-time payment:

Name of Funding Account Sophiya_1st card

Current Account Ledger Balance \$ 99.00

Amount to Pay \$ 99

Discount \$ 9.00

Total Amount to Pay \$ 90.00

☐ I authorize my child care provider to charge my funding account for the child care services provided for the amount indicated above. The authorization is valid for one time use only. I certify that I am an authorized user of the funding account and that I will not dispute the payment with my credit card company or bank; so long as the transaction corresponds to the terms indicated here.

Submit **Cancel**

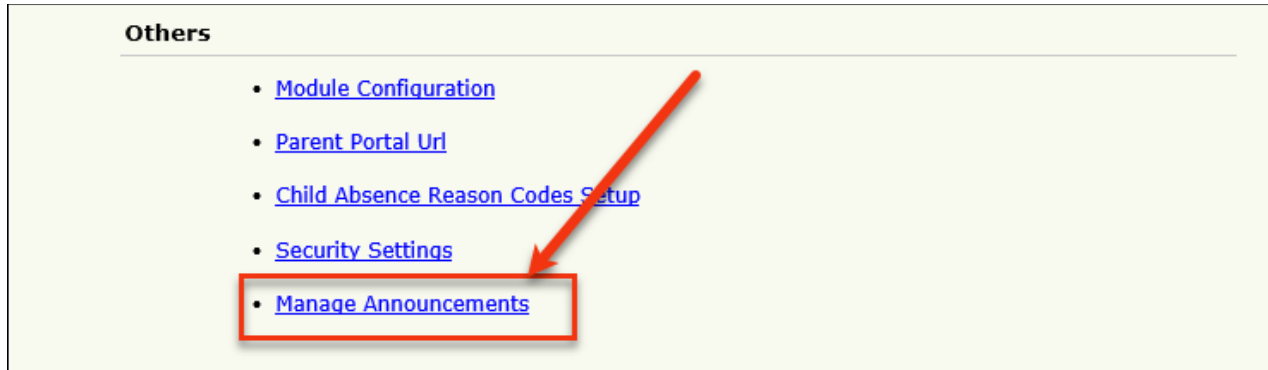
When parents make TPD payments, they can see the discount details. The total amount to pay will be difference of Amount to Pay and Discount.

To enable this feature, please contact support@oncarecloud.com.

12. **New:** Manage Announcements

This is new feature available for the company super users. They can use this feature to display special announcements or messages to the users (admin/director/parent) in that specific company/center.

Access Path: Administrative Functions → Others → Manage Announcements



A screenshot of the 'Manage Announcements' page in the OnCare DEMO system. The page has a header with the OnCare DEMO logo and navigation links for Home, Feedback, and Logout. Below the header, there is a section titled '>> Manage Announcements'. On the left, there is a '<< Back' link, and on the right, there is an 'Add New' link. A note box states: 'Note: Selecting 'All' role will display the announcement to all roles except parents. To send announcements to Parents, select the role as 'Parent''. Below the note, there is a 'View' dropdown menu set to 'Active (A)'. The main content area contains a table with two rows of announcements.

Message	Start Date	End Date	Status	Action
Wishing you all peace, love and happiness at Easter and always!!!	04/01/2017	04/30/2017	A	Edit
Summer Camp Enrollment begins on April 1st, 2017.Hurry!Limited Registrations Only.	03/01/2017	04/30/2017	A	Edit

At the bottom of the page, there is a footer with the text: '@ 2017 OnCare. All rights reserved. OCO 3.2.2 Today: April 12, 2017'.

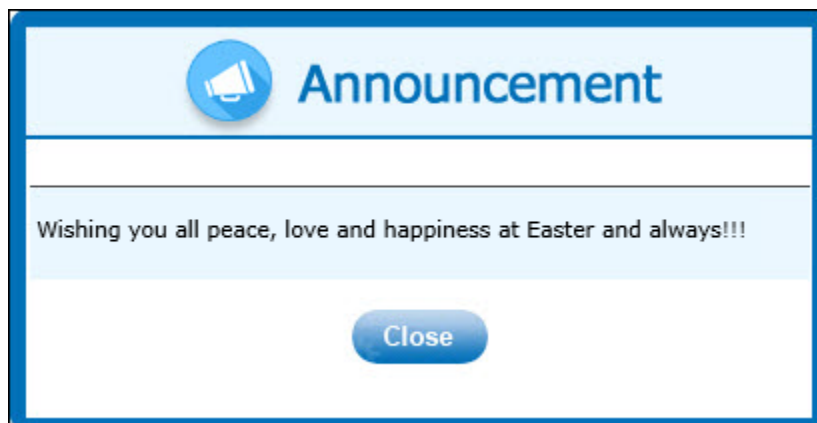
Click 'Add New' or 'Edit' in the above screen to add new or edit an announcement.

Add/Edit Announcement:

The screenshot shows the 'Manage Announcements' interface in the OnCare DEMO system. At the top right are links for 'Home', 'Feedback', and 'Logout'. The main header displays the 'oncare DEMO' logo. Below this is a dark blue bar with the text '>> Manage Announcements'. A '<< Back' link is on the left. The form contains several fields: '* Start Date' (4/14/2017), '* End Date' (4/17/2017), '* Select Center' (Sandbox Boston), and '* Select Role' (Parent). A '* Message' section features a rich text editor with a toolbar and a large text area. A red callout bubble points to the text area with the text 'Enter the announcement message here.' Below the text area are 'Save' and 'Cancel' buttons. The footer contains copyright information '@ 2017 OnCare. All rights reserved.', version 'OCO 3.2.2', and the date 'Today: April 12, 2017'.

1. Select the start and end dates for the announcement display.
2. Select whether this announcement is applicable for all or specific center.
3. Select the role for which the announcement must be displayed.
4. Click **Save** to add the announcement.

The saved announcement will be **displayed in the login screen** for the selected center(s) and role(s) for the dates set i.e. as per the above screen, the announcement will be displayed for the parents (role) in the center Sandbox Boston from 14th April 2017 to 17th April 2017. Existence



13. System Admin New: Mapping Users to ChildCareIRiS

The system admins can now map existing and new users to ChildCareIRiS:

The screenshot displays the 'User Management' interface within the OnCare Administration system. The page includes a header with the OnCare logo and navigation links (Home, Feedback, Help, Logout). The main content area is titled 'User Management' and contains a 'Back' link. The user creation form includes fields for First Name (Viji), Last Name (Raju), Username (Viji_staff), Password (masked with asterisks), Re-enter Password (masked with asterisks), Email (useremail@bussoftwaresolutions.com), Status (Active), Role Name (Company Super User), and Location Assignment. A 'Password Strength Meter' is also present. The 'External Application' dropdown menu is open, showing a list of applications: Amazing Kids, Champion Kids, Creative Kids, Happy Kids, and ChildCareIRiS. The 'ChildCareIRiS' option is selected, indicated by a red box and a red arrow. A 'Save' button is located at the bottom of the form.

OnCare Administration

User Management

<< Back

* First Name: Viji

* Last Name: Raju

* Username: Viji_staff

* Password: *****

Password Strength Meter

* Re-enter Password: *****

* Email: useremail@bussoftwaresolutions.com

* Status: Active

* Role Name: Company Super User

* Location Assignment:

External Application:

Amazing Kids

Champion Kids

Creative Kids

Happy Kids

☒ ChildCareIRiS

Save

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While creating a user, make sure to select 'ChildCareIRiS' under External Application option to provide that user access to the ChildCareIRiS module.

OnCare Office



Online Center Management

- [Family Accounting](#)
- [Time / Attendance Tracking](#)
- [Enrichment Programs](#)
- [Camp / Event Registration](#)



Online Marketing

- [Center Tour Request](#)
- [Waitlist Online](#)
- [Interested Families Mgmt](#)



Employee / Staff

- [Staff Record / Time Sheet](#)



Parents Communication

- [Batch Emails](#)
- [Online Forms](#)



Integrated Partners Solutions

- [Labor Management](#) (ChildCareIRiS)

14. System Admin New: External App Configuration for Company

A new tab 'External App' has been added to the Company Setup. This enables the user to configure the external app visibility and credentials for that company.

Access Path: Company Setup → External App

Company Setup

Company Information

Contact Information

Modules Activated

Module Configuration

External App

External Application Credentials

No.	Application	User Name	Password
1	ChildcareCRM	swing	swing
2	ChildCareIRIS	swing	swing
3	ELVCore		
4	KidReports		
5	LearningGenie		
6	LifeCubby		
7	Memberhub		
8	MyChildNow		
9	Nike		

External Application Visibility

No.	Application	Visible
1	ChildCareIRIS	<input checked="" type="checkbox"/>
2	ELVCore	<input type="checkbox"/>

Save

15. System Admin New: Center Level Configurations

The system admin can now configure the below 3 features at center level.

Access Path: Center Setup → Feature Configuration

- Generate Payment Receipt – Select 'Yes' for 'Generate Payment Receipt' option
- Payment Refund – Select 'Yes' for 'Is Payment Refund Allowed' option
- Multiple Funding Account – Select 'Yes' for 'Is Multiple Funding Account Allowed' option

Center Setup

Center Information | Contact Information | **Feature Configuration**

Quick Books

QB Start Date: 01/06/1983

QB Username: teer

QB Password: err

Others

TPD Registration URL:

TPD Login URL:

Enrichment Program: ☒ Yes ☐ No

Waitlist Program: ☐ Yes ☒ No

New School Year Registration: ☒ Yes ☐ No

Grade/School for School Age: ☒ Yes ☐ No

* 24 Hour Center: ☐ Yes ☒ No

Food Program

Minute Menu Location ID: 27

Meals and Snacks Tracking: ☒ Yes ☐ No

Payment Setup

* Online Payment Solution: ☐ Tuition Pay Direct(TPD)
☐ Tuition Auto Pay(TAP)
☒ TPD + TAP
☐ None

* OTP Invitation: ☐ Yes ☒ No

* Is Multiple Funding Account Allowed: ☐ Yes ☒ No

* Is Payment Refund Allowed: ☒ Yes ☐ No

* Generate Payment Receipt: ☐ Yes ☒ No