OnCare Office Ver 3.2.2 E5

Release Notes: Jul 24, 2017

Features:

#	Type	Module	Description	Pg
1	**Updated**	Family Accounting	**Child Tuition Billing section moved to a new page**	1
2	**Updated**	Family Accounting	**The Child Without Billing Report is now available in the center level**	3
3	**Enhanced**	Family Accounting	**Users can now filter the bank deposit by ledger type**	4
4	**Enhanced**	Family Accounting	**Centers can now use both company and center level child questions**	6
5	**Enhanced**	Family Accounting	**The enrollment/withdrawal report will now display the withdrawal reason**	7
6	**Updated**	Family Accounting	**TAP Enrollment Counter update**	8

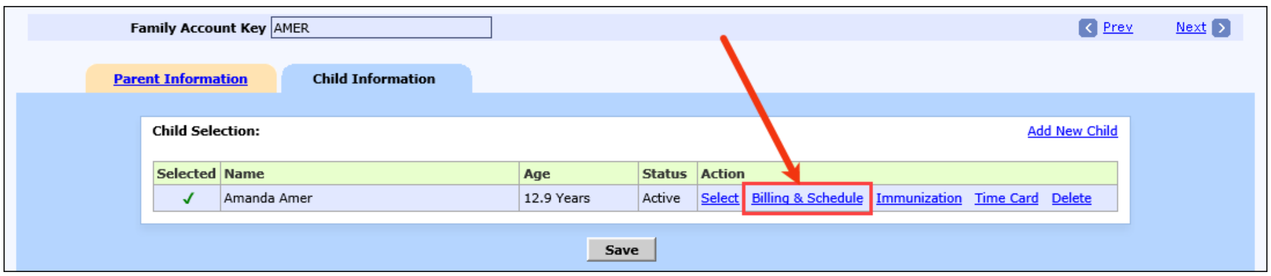
1. Updated: Child Billing and Schedule

The Child tuition billing and schedule sections are now moved to a separate page within the Child Info page.

Access Path: Family Accounting →Family Records→Child Info

A new link 'Billing & Schedule' will available in the Child Selection section of the Child Info Page, between Select and Immunization links.

Note: This link will be displayed only when the Child record is saved.



Click the Billing & Schedule link to add the billing / schedule details for the respective child.

Home Feedback Help Logout

OnCare DEMO

Sandbox Boston

Family Accounting

Main Menu Setup Reports Functions

>> Child Billing Setup

« Back

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 Edit Search Select Acct Ledger Info Sheet Authorized Person Family Notes

Family Account Key AMER | Prev | Next

Parent Information | **Child Information**

Child Selection: Add New Child

Selected	Name	Age	Status	Action
✓	Amanda Amer	12.9 Years	Active	Select Billing & Schedule Immunization Time Card

Save

Child Name
Amanda Amer

Select Type Regular Schedule — Add New

Effective Date 08/01/2017 to

Schedule Name 3 Days Full Time - M,W,F **Start Date** 08/01/2017 **End Date**

Edit

Day	Time In	TimeOut	Total Hrs	Classroom
Mon	09:00 am	05:00 pm	8.00	Toddler 3
Wed	09:00 am	05:00 pm	8.00	Toddler 3
Fri	09:00 am	05:00 pm	8.00	Toddler 3
		Grand Total	24.00	

Vacation Days 0 **Monthly Contracted Hours** **FTE Value : 0.6**

Billing

Add New Billing

Program Billing

Billing Cycle: Monthly — Change Billing Cycle

Ledger Type	Transaction Type	Billing Frequency	Billing / Credit Description	Amount / Credit %	Comments	Date Start	Date End	Status	Action
Sponsor	Tuition Charge	Monthly	3 Days	250.00	Amanda Amer			Active	Edit Delete Add % Discount

Subsidized Billing information

Full Day Daily Rate $ **last changed**

Part Day Daily Rate $ **last changed**

Comments

Contract Expiration Date (MM/DD/YYYY)

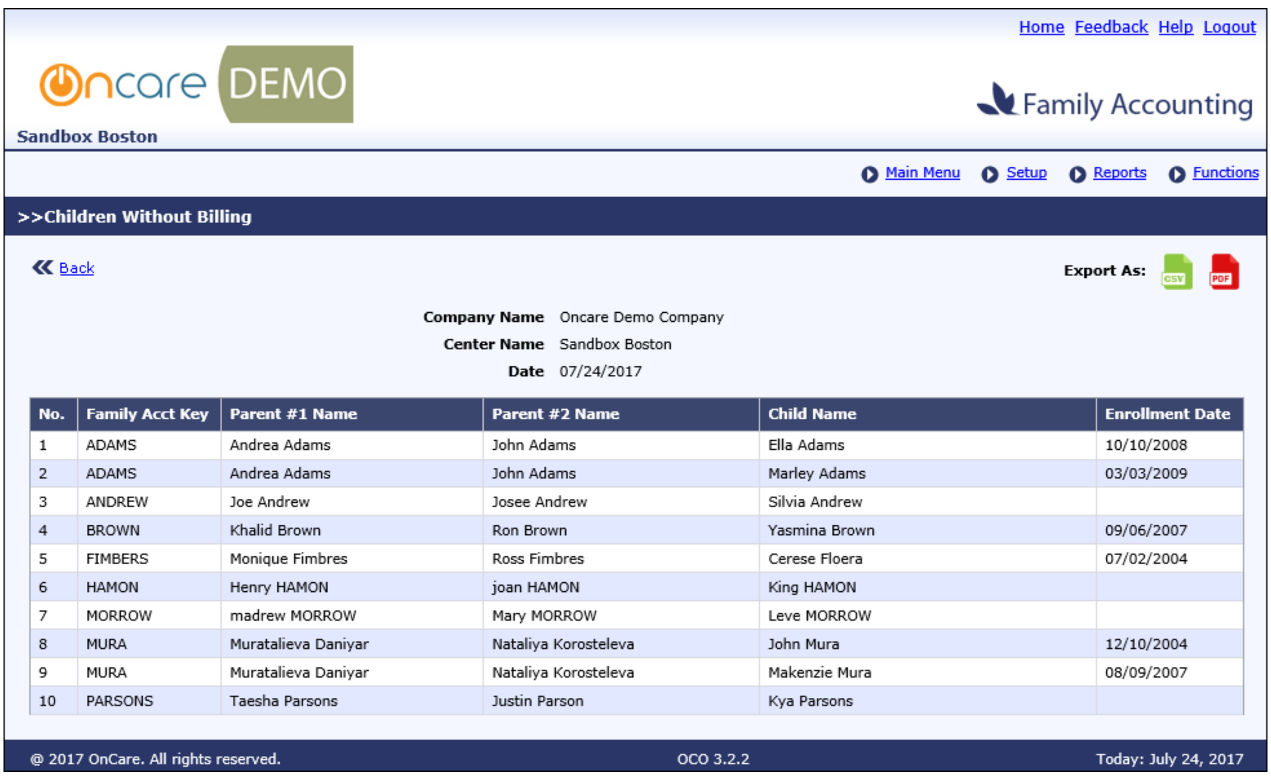
Save

 OCO 3.2.2 Today: July 24, 2017

2. Updated: Child Without Billing Report

The Child without billing report that was available to the admins at company level is now available for the directors in center level also.
This report will list children who do not have any billing setup for them.

Access Path: Family Accounting→Reports →Accounting → Child Without Billing



No.	Family Acct Key	Parent #1 Name	Parent #2 Name	Child Name	Enrollment Date
1	ADAMS	Andrea Adams	John Adams	Ella Adams	10/10/2008
2	ADAMS	Andrea Adams	John Adams	Marley Adams	03/03/2009
3	ANDREW	Joe Andrew	Josee Andrew	Silvia Andrew	
4	BROWN	Khalid Brown	Ron Brown	Yasmina Brown	09/06/2007
5	FIMBERS	Monique Fimbres	Ross Fimbres	Cerese Floera	07/02/2004
6	HAMON	Henry HAMON	joan HAMON	King HAMON	
7	MORROW	madrew MORROW	Mary MORROW	Leve MORROW	
8	MURA	Muratalieva Daniyar	Nataliya Korosteleva	John Mura	12/10/2004
9	MURA	Muratalieva Daniyar	Nataliya Korosteleva	Makenzie Mura	08/09/2007
10	PARSONS	Taesha Parsons	Justin Parson	Kya Parsons	

Users can export this report as CSV and PDF.

3. Enhanced: Bank Deposit Report

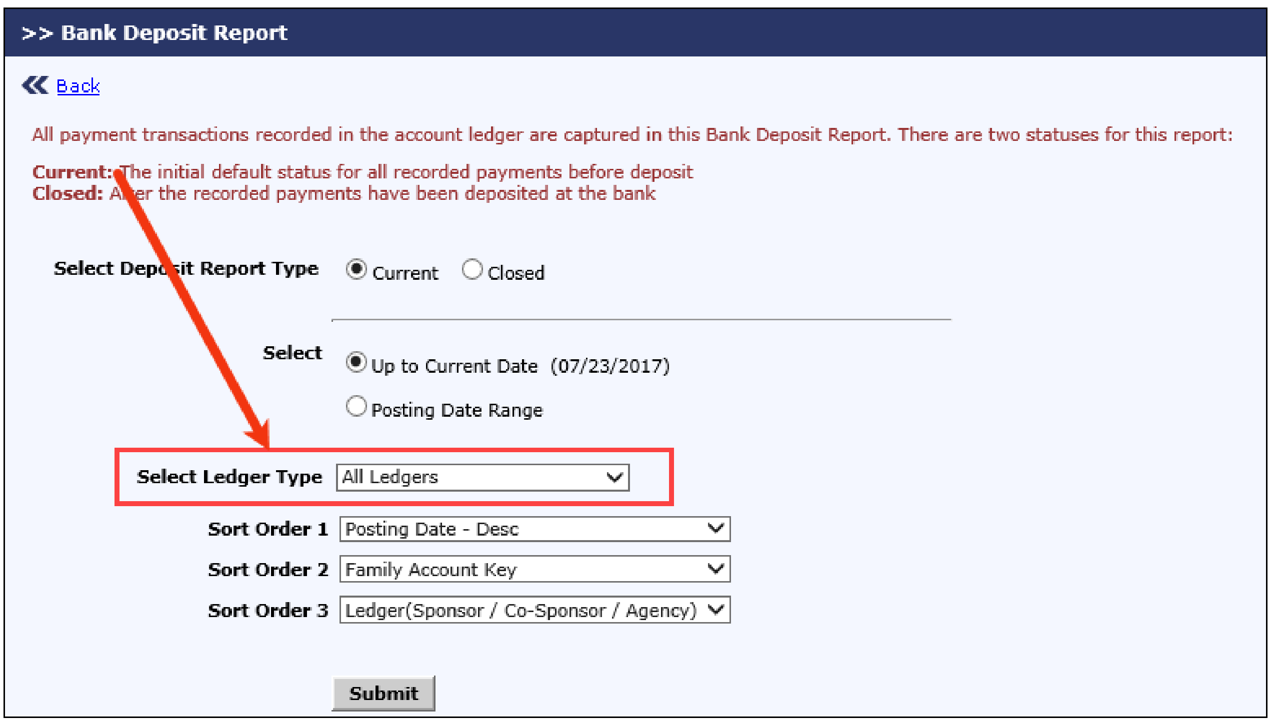
This report is enhanced to be filtered by ‘Ledger Type’.

Users will now be able to filter the Bank Deposit Report by ledger type.
A new filter option ‘Ledger Type’ will be added to the filter page of this report. User can select one of the below options from this list:

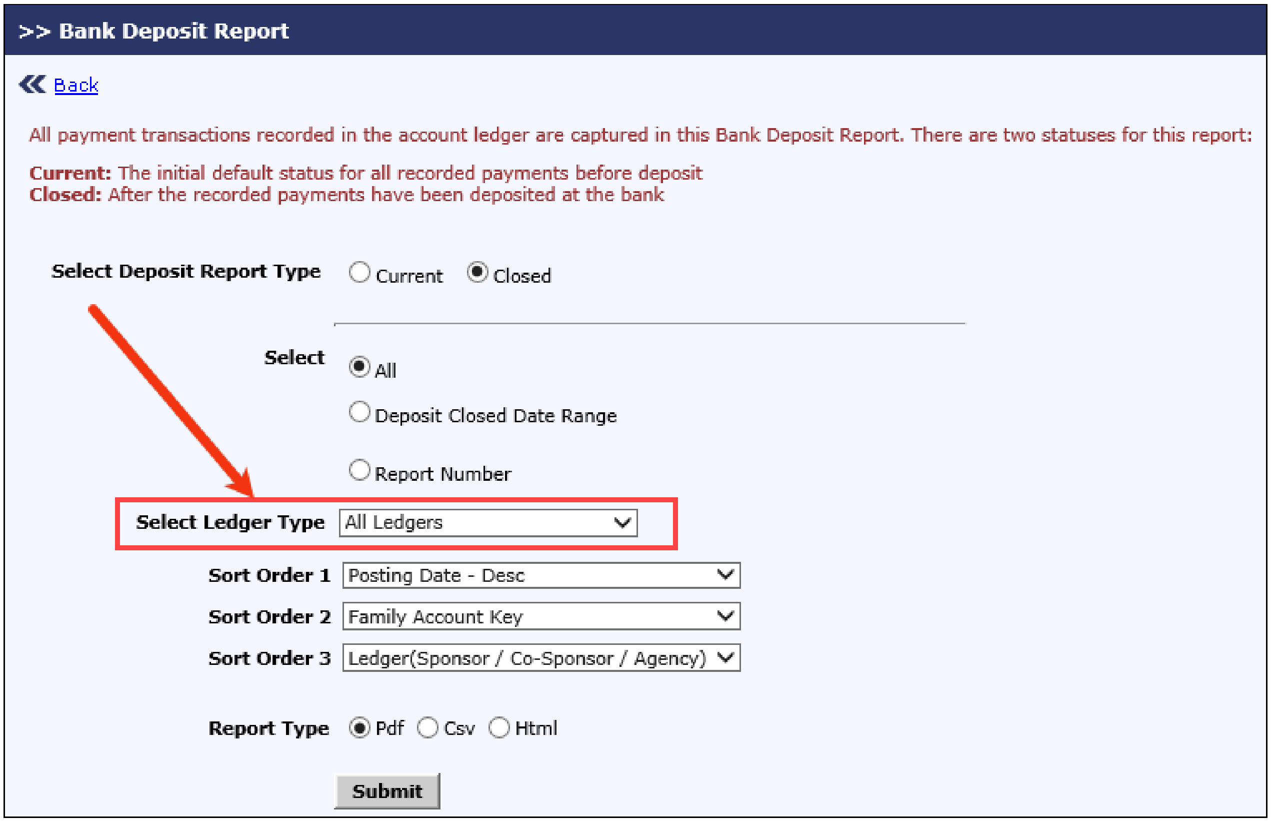
1. All Ledgers
2. Sponsor / Co-Sponsor
3. All Agencies
4. Agency 1
5. Agency 2
6. …and so on

Access Path: Family Accounting →Reports → Accounting → Bank Deposit Report

Current Deposit report:



Closed Deposit report:



Report Output:

The report output will not have any difference. The data displayed alone will be based on the 'Ledger Type' filter selected.

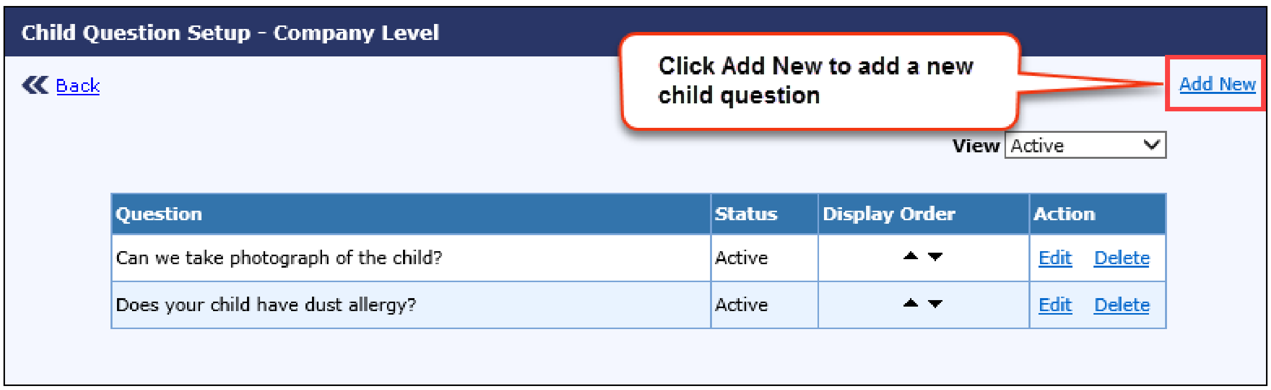
1. All Ledger – This will be same as the present report. Transactions of all ledger types will be displayed
2. Sponsor / Co-Sponsor – Payment transactions of Sponsor and Co-Sponsor alone will be displayed
3. All Agencies – Payment transactions of all agencies will be displayed
4. <Agency Name> - Payment transactions of the selected Agency will alone be displayed

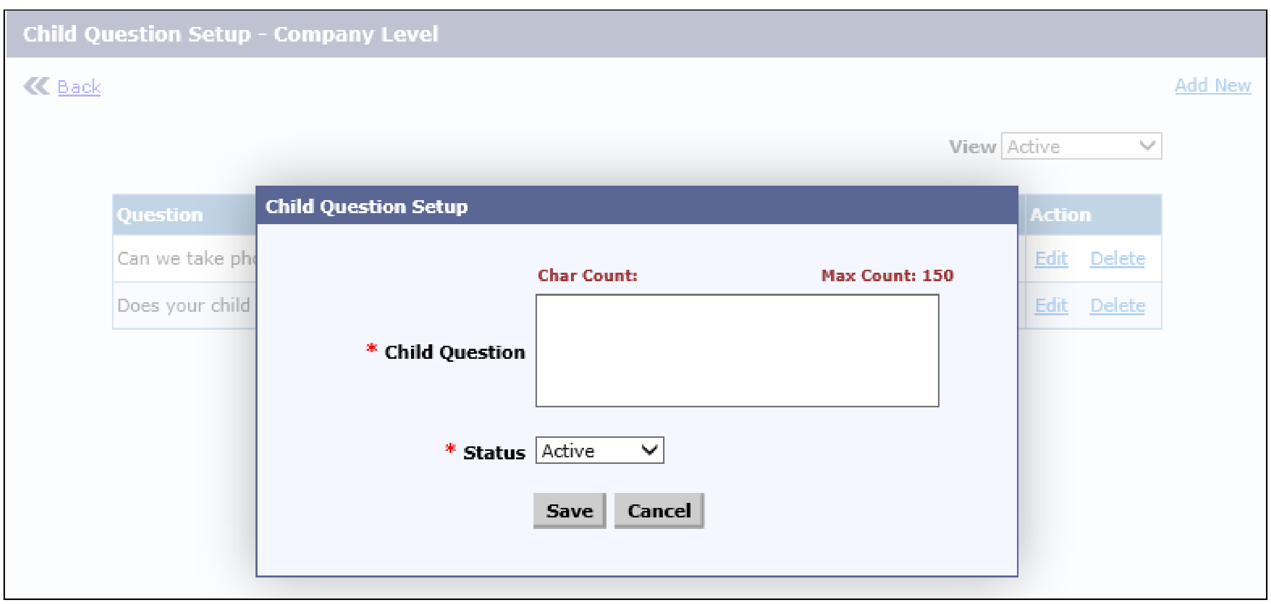
4. Enhanced: Child Questions Customizations

Earlier the Child Questions can be either setup at company level or at center level.
Now, the Child questions will be setup at company level. These will be available for all centers and if needed center can add their own questions too. i.e. Center can use both company level and center level questions.

Child Question Setup - Company Level:

Access Path: Administrative Functions →Child Question Setup – Company Level



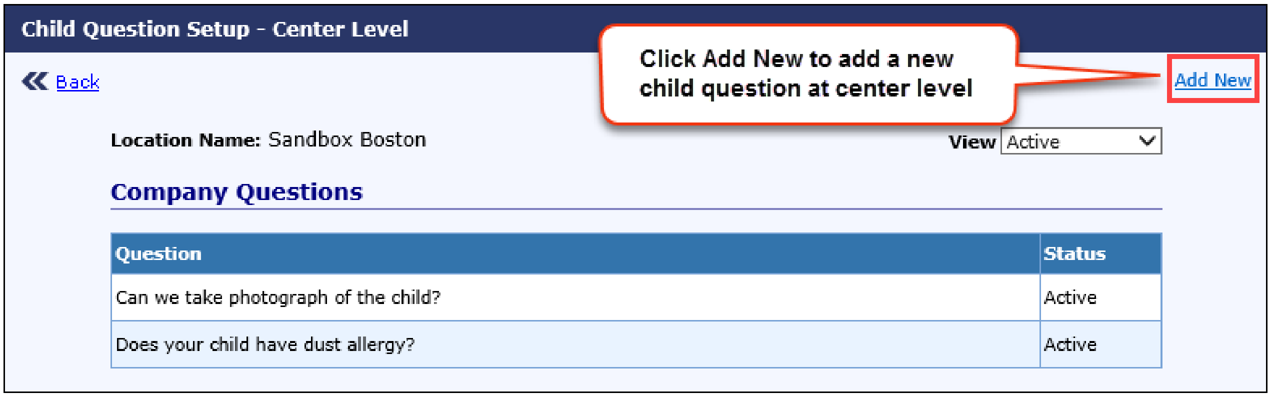


Enter the Child Question details and **Save**.

Child Question Setup - Center Level:

Access Path: Administrative Functions →Child Question Setup – Center Level

All the questions added at the company level will be available here:



If needed, user can also add a new child question here.

Please note: Any question added here will be available only for this center in that company.

5. Enhanced: Enrollment/Withdrawal Report Enhancement

Earlier, the Enrollment/withdrawal report displayed the details of the children enrolled and withdrawn during the selected period.
Now the withdrawal reason will also be displayed for each child withdrawing during that period.

Access Path: Family Accounting →Reports → Family/Child Data → Enrollment/Withdrawal Report

Withdrawals Details (01/01/2017 - 12/31/2017)

No	Family Account Key	Child Name	Withdrawal Date	Withdrawal Reason	Child Status
1	A. BECK	Shelby B. Turner	02/15/2017	Graduated	Inactive
2	HENRY	Mary Henry	11/22/2017	MovedToDiffArea	Inactive

6. Updated: TAP Enrollment Counter Update

Earlier, the TAP Enrollment counter displayed the split as below:

- Total Active Families
- Total Active Families Enrolled in TAP
- Total Active Families Not Enrolled

Now this count is split based on the payors. The number of payors depends on the type of a family. Single ledger families will have one payor, whereas multi-ledger families will have 2 payors.

Access Path: Family Accounting → Tuition Auto Pay (TAP)