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## OnCare Office Ver 3.2.2 E5

### Release Notes: Jul 24, 2017

#### Features:

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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

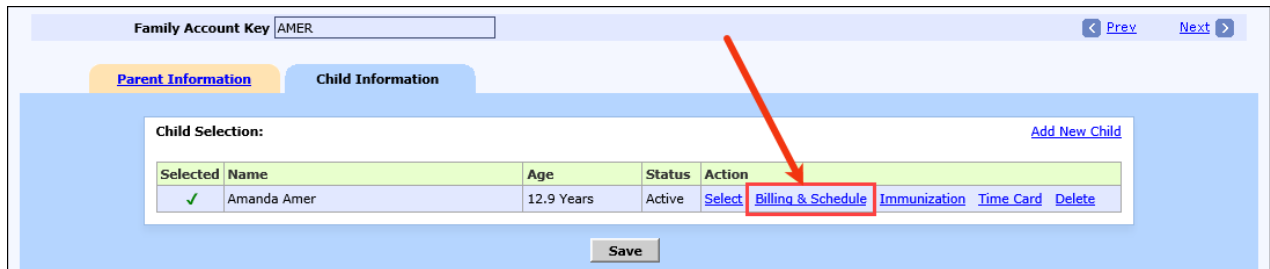
## 1. Updated: Child Billing and Schedule

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 be 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.



The screenshot shows the 'Child Info' page with the 'Child Information' tab selected. At the top, there is a 'Family Account Key' field with the value 'AMER' and 'Prev' and 'Next' navigation links. Below this, there are two tabs: 'Parent Information' and 'Child Information'. The 'Child Information' tab contains a 'Child Selection' section with a table. The table has columns: 'Selected', 'Name', 'Age', 'Status', and 'Action'. A red arrow points to the 'Billing & Schedule' link in the 'Action' column of the first row. The 'Billing & Schedule' link is highlighted with a red box. Other links in the 'Action' column include 'Select', 'Immunization', 'Time Card', and 'Delete'. There is also an 'Add New Child' link at the top right of the table. A 'Save' button is located at the bottom of the table.

Selected	Name	Age	Status	Action
✓	Amanda Amer	12.9 Years	Active	Select <b>Billing &amp; Schedule</b> Immunization Time Card Delete

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

>> Child Billing Setup

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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

[Prev](#) [Next](#)

Parent Information

Child Information

Child Selection:

[Add New Child](#)

Selected	Name	Age	Status	Action
<input checked="" type="checkbox"/>	Amanda Amer	12.9 Years	Active	<a href="#">Select</a> <a href="#">Billing &amp; Schedule</a> <a href="#">Immunization</a> <a href="#">Time Card</a>

[Save](#)



Child Name  
**Amanda Amer**

Select Type

[Add New](#)

Effective Date

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

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		Status	Action
						Start	End		
Sponsor	Tuition Charge	Monthly	3 Days	250.00	Amanda Amer			Active	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Add % Discount</a>

[Subsidized Billing information](#)

Full Day Daily Rate \$

last changed

Part Day Daily Rate \$

last changed

Comments

Contract Expiration Date

(MM/DD/YYYY)

[Save](#)

## 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



Sandbox Boston

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



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

>>Children Without Billing

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Export As:  

**Company Name** Oncare Demo Company  
**Center Name** Sandbox Boston  
**Date** 07/24/2017

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	Taisha Parsons	Justin Parson	Kya Parsons	

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OCO 3.2.2

Today: July 24, 2017

Users can export this report as CSV and PDF.

### 3. Enhanced: Bank Deposit Report

This report is enhanced to be filtered by 'Ledger Type'.

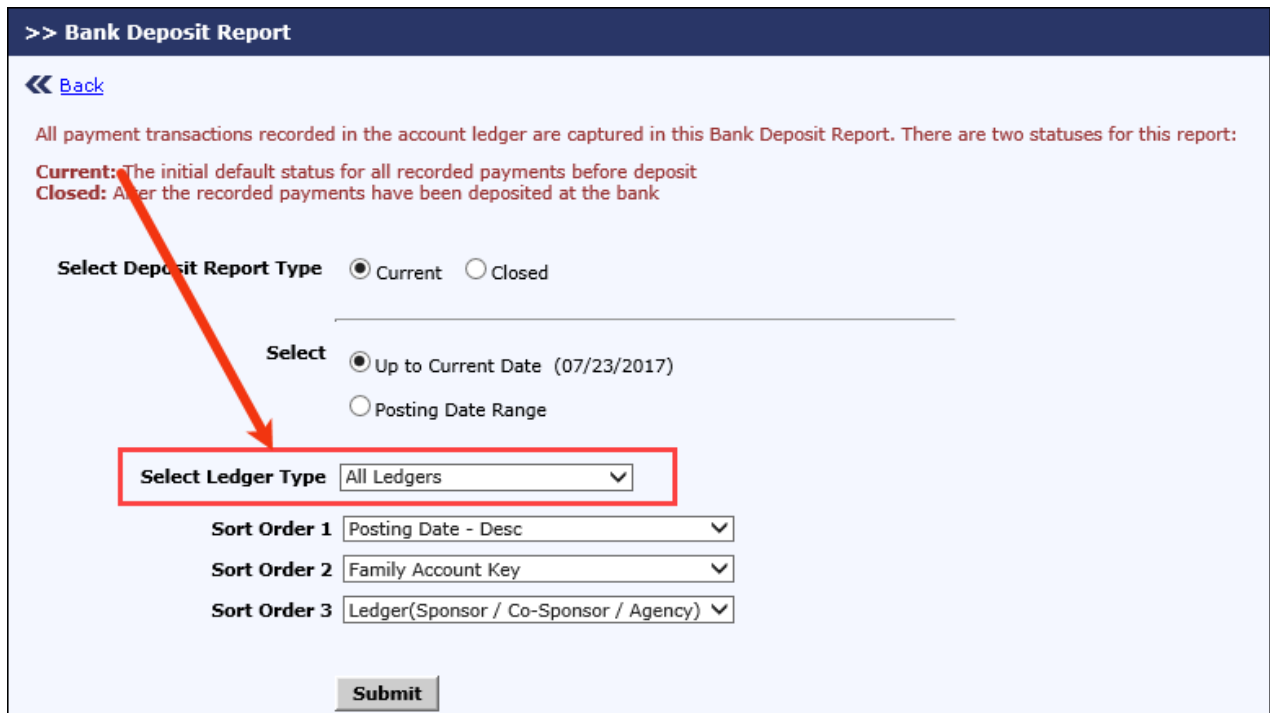
Users will now be able to filter the Bank Deposit Report by ledger type.

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:



**>> Bank Deposit Report**

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All payment transactions recorded in the account ledger are captured in this Bank Deposit Report. There are two statuses for this report:

**Current:** The initial default status for all recorded payments before deposit  
**Closed:** After the recorded payments have been deposited at the bank

**Select Deposit Report Type** ☒ Current ☐ Closed

**Select** ☒ Up to Current Date (07/23/2017) ☐ Posting Date Range

**Select Ledger Type** All Ledgers ▼

**Sort Order 1** Posting Date - Desc ▼

**Sort Order 2** Family Account Key ▼

**Sort Order 3** Ledger(Sponsor / Co-Sponsor / Agency) ▼

**Submit**

Closed Deposit report:

**>> Bank Deposit Report**

[<< Back](#)

All payment transactions recorded in the account ledger are captured in this Bank Deposit Report. There are two statuses for this report:

**Current:** The initial default status for all recorded payments before deposit

**Closed:** After the recorded payments have been deposited at the bank

**Select Deposit Report Type** ☐ Current ☒ Closed

**Select** ☒ All ☐ Deposit Closed Date Range ☐ Report Number

**Select Ledger Type** All Ledgers ▼

**Sort Order 1** Posting Date - Desc ▼

**Sort Order 2** Family Account Key ▼

**Sort Order 3** Ledger(Sponsor / Co-Sponsor / Agency) ▼

**Report Type** ☒ Pdf ☐ Csv ☐ Html

**Submit**

### 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

The screenshot shows the 'Child Question Setup - Company Level' interface. At the top left is a 'Back' link. A red callout box points to the 'Add New' button at the top right, with the text 'Click Add New to add a new child question'. Below the header is a 'View' dropdown menu set to 'Active'. A table lists existing questions:

Question	Status	Display Order	Action
Can we take photograph of the child?	Active	▲ ▼	<a href="#">Edit</a> <a href="#">Delete</a>
Does your child have dust allergy?	Active	▲ ▼	<a href="#">Edit</a> <a href="#">Delete</a>

The screenshot shows the 'Child Question Setup' modal form. It includes a 'Char Count' and 'Max Count: 150' label. The form has a text input field for the question, a 'Status' dropdown menu set to 'Active', and 'Save' and 'Cancel' buttons. The background shows the same list of questions as the previous screenshot.

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:

**Child Question Setup - Center Level**

[Back](#)

Location Name: Sandbox Boston View: Active

**Company Questions**

Question	Status
Can we take photograph of the child?	Active
Does your child have dust allergy?	Active

[Add New](#)

Click Add New to add a new child question at center level

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)

**>> Tuition Auto Pay (TAP)**

**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. [Process TAP Payment For Family](#)
3. [Review Status of Submitted TAP Payment](#)

**TAP Enrollment**

Enrollment Counter	
Total Active Families	146
Total Active Payors	149
<a href="#">Total Active Payors Enrolled in TAP</a>	127
Total Active Payors Not Enrolled	22

[TAP Enrollment](#)