



OnCare Office Ver 3.2.2 E5

Release Notes: Jul 24, 2017

Features:

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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 a web interface for child selection. At the top, there is a 'Family Account Key' field with the value 'AMER' and navigation buttons for 'Prev' and 'Next'. Below this are two tabs: 'Parent Information' and 'Child Information'. The 'Child Information' tab is active. Underneath, there is a 'Child Selection:' section with an 'Add New Child' link. A table lists child records with columns: Selected, Name, Age, Status, and Action. The first row shows a checked 'Selected' box, the name 'Amanda Amer', '12.9 Years' for age, and 'Active' for status. The 'Action' column contains links: 'Select', 'Billing & Schedule', 'Immunization', 'Time Card', and 'Delete'. The 'Billing & Schedule' link is highlighted with a red box, and a red arrow points to it from above. A 'Save' button is located at the bottom of the table area.

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

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

>> 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

[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	Select Billing & Schedule Immunization Time Card

Save



Child Name
Amanda Amer

Select Type

[Add New](#)

Effective Date

Schedule Name

Start Date

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	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

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

The screenshot shows a menu titled "Accounting" with seven items. A red arrow points to the fourth item, "Children Without Billing", which is also enclosed in a red rectangular box. The other items are: 1. Account Activity, 2. Aging Report, 3. Child Billing Item Setup Report, 5. Bank Deposit Report, 6. Family Account Statement, and 7. Specific Charge/Credit Detail Report.

The screenshot shows the "Children Without Billing" report interface. At the top, there are navigation links: Home, Feedback, Help, Logout. The OnCare DEMO logo and "Sandbox Boston" are on the left, and "Family Accounting" is on the right. Below the header, there are navigation buttons: Main Menu, Setup, Reports, Functions. The report title is ">>Children Without Billing". There is a "Back" link and "Export As:" options for CSV and PDF. The report details are as follows:

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	Taesha Parsons	Justin Parson	Kya Parsons	

At the bottom, there is a footer with: © 2017 OnCare. All rights reserved., OCO 3.2.2, and 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

<< 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 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

Sort Order 1
Sort Order 2
Sort Order 3

Report Type Pdf Csv Html

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

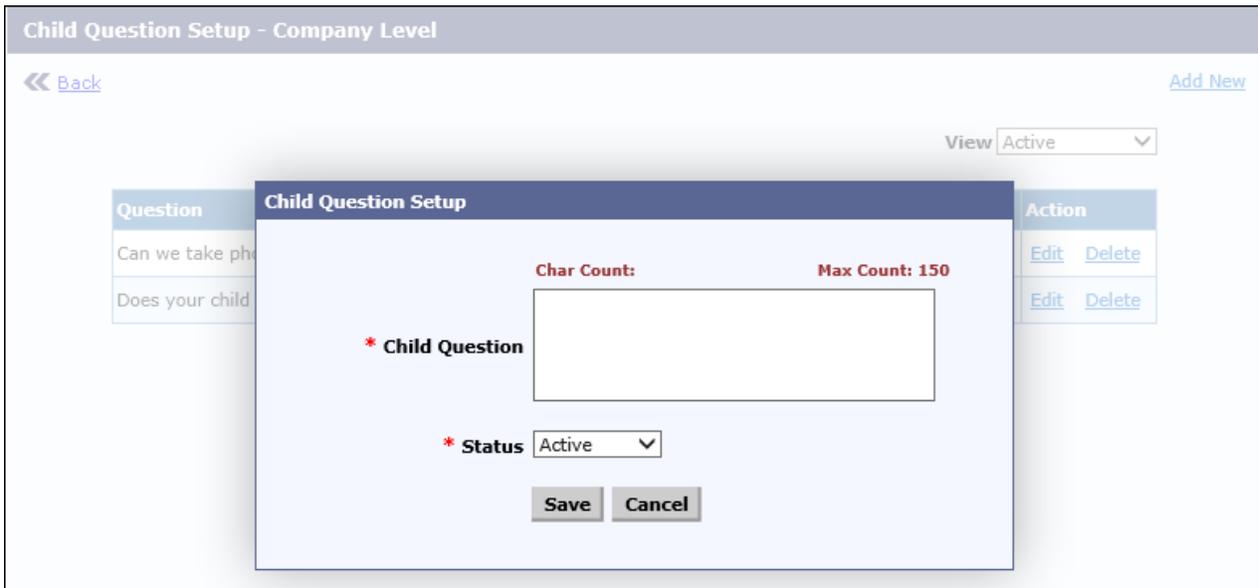


Child Question Setup - Company Level

← Back View Active ▾ Add New

Click Add New to add a new child question

Question	Status	Display Order	Action
Can we take photograph of the child?	Active	▲ ▼	Edit Delete
Does your child have dust allergy?	Active	▲ ▼	Edit Delete



Child Question Setup - Company Level

← Back View Active ▾ Add New

Child Question Setup

Char Count: Max Count: 150

* Child Question

* Status

Question	Action
Can we take ph	Edit Delete
Does your child	Edit Delete

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:

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

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

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
Total Active Payors Enrolled in TAP	127
Total Active Payors Not Enrolled	22

[TAP Enrollment](#)