



OnCare Office Version 3.3.1

Release Notes: Sep 11, 2017

Customer Features:

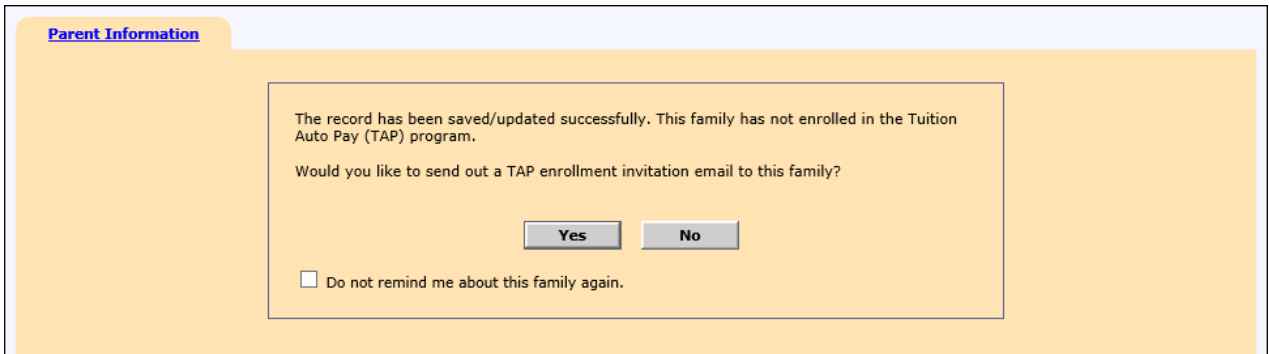
#	Type	Module	Description	Pg
1	Updated	Family Accounting	The Online payment enrollment invitation reminder text will be based on the online payment options (TAP/TPD/Both)	1
2	Enhanced	Family Accounting	The Parent Portal User Registration Invitation email flow has been changed	2
3	Enhanced	Family Accounting	The Date Printed will now be displayed in the Child Allergy / Emergency Contact Report	3
4	Enhanced	Family Accounting	Now the Parents can delete a multiple funding account if payment % is zero	5
5	Enhanced	Family Accounting	Users can now manage the Parent user details	6
6	New	Staff Management	Users can now select if Location Directors can Edit the Staff Time Card	9
7	Enhanced	Online Forms	All users can now access the Parent Uploaded forms	10

1. Updated: Parent Portal Reminder Invitation Text

The Parent Portal Enrollment Reminder displayed when a family record is saved is customized now. The reminder text will be displayed based on the online payment option selected by that company/center.

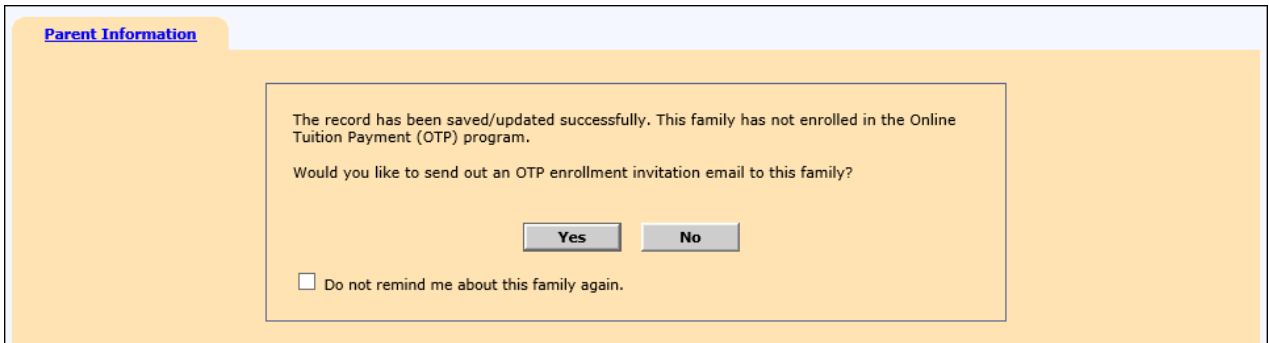
Access Path: Family Accounting → Family Records → Edit Family Record

TAP only:



The screenshot shows a web interface with a light blue header bar containing the text "Parent Information" in blue. Below the header is a large orange rectangular area. Centered within this area is a white rectangular dialog box with a thin black border. The dialog box contains the following text: "The record has been saved/updated successfully. This family has not enrolled in the Tuition Auto Pay (TAP) program." followed by the question "Would you like to send out a TAP enrollment invitation email to this family?". Below the question are two gray buttons labeled "Yes" and "No". At the bottom of the dialog box is a checkbox followed by the text "Do not remind me about this family again."

OTP (TAP and TPD):



The screenshot shows a web interface with a light blue header bar containing the text "Parent Information" in blue. Below the header is a large orange rectangular area. Centered within this area is a white rectangular dialog box with a thin black border. The dialog box contains the following text: "The record has been saved/updated successfully. This family has not enrolled in the Online Tuition Payment (OTP) program." followed by the question "Would you like to send out an OTP enrollment invitation email to this family?". Below the question are two gray buttons labeled "Yes" and "No". At the bottom of the dialog box is a checkbox followed by the text "Do not remind me about this family again."

2. Enhanced: Parent Portal User Registration Invitation Email

The flow of the Parent portal user registration invitation email has been enhanced for better usability.

Access Path: Family Accounting → Functions → Parent Portal User Registration Invitation Email

>> Select Families

[<< Back](#)

Please select the type of families that you would like to send Parent Portal User Registration Invitation:

- [Existing Families](#)**
Families already entered in OnCare
- [New Families](#)**
Families not yet entered in OnCare

Existing Families:

>> Existing Families

[<< Back](#)

Select existing families to send Parent Portal Registration Invitation:

Classroom ☐ All
☐ 07 Pre-K ☒ 02 Infant 2 ☐ 01 Infant ☐ Class B
☐ 05 Pre-S 1 ☐ 06 Pre-S 2 ☐ 08 School Age ☐
☐ 04 Two's ☐ 03 Toddlers ☐ Class A

Family Status ☒ All
☒ Active ☒ Incoming ☒ Waitlist

Invitation Not Sent

Invitation Sent But Not Yet Registered

Already Registered

No.	Sel. <input type="checkbox"/>	Family Acct Key	First Name	Last Name	Parent Type	Child(ren)	Email	Family Status
1	<input type="checkbox"/>	BARNARD	MADDISON	BARNARD	Sponsor	SOPHIA	mlbarn218@beyonduniverse.in	Active
2	<input type="checkbox"/>	BOYER	NICK	BOYER	Sponsor	LYLA	kylietoepeke@beyonduniverse.in	Active
3	<input type="checkbox"/>	BROWN1	HEATHER	BROWN	Sponsor	EZRA	abheather14@beyonduniverse.in	Active
4	<input type="checkbox"/>	DUBOIS	KAYLA	DUBOIS	Sponsor	SANTANA	kayladubois1996@beyonduniverse.in	Active

New Families:

>> New Families

<< [Back](#)

Please enter the information below. The system will create a **new family record** and send an invitation to the parent to register with the OnCare Parent Portal. Once registered, the parent can update the information in the family and child record.

Note: For Family Acct Key, use up to 10 characters of the family last name. For common last name (e.g. SMITH), add a digit after the last name to make Family Account Key unique(e.g. SMITH1, SMITH2).

No	Family Acct Key	First Name	Last Name	Email
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Continue


3. Enhanced: Date printed in Child Allergy / Emergency Contact Report

The date the report was printed will now displayed in the below reports:

1. Child Allergy / Medication / Special Diets Report

Access Path: Family Accounting → Reports → Child Allergy / Medication / Special Diets Report

Select the 'Child Allergy' / Medication / Special Diets / IFSP Report

Page 8 of 8

Date Printed: 09/08/2017

Company Name : Oncare Demo Company (Sandbox)
Center Name : Sandbox Boston


Child Allergy / Emergency Contact Report

Classroom Name : Discoverer Club

Child FN	Child LN	Allergy	Child Allergy Description	Physician Name Contact Phone	Emergency Contact Phone Number
John	Mura	Y	Citric Fruits are allergy	Doctor: Allan Marks (650) 368-8583	Parent: Muratalieva Daniyar Home: 234-344-4342 Work: 234-344-4342 Cell: 234-344-4342 Nataliya Korosteleva Cell: 234-344-4344

2. Classroom / School Directory Report

Access Path: Family Accounting → Reports → Classroom / School Directory Report

Page 6 of 56

Date Printed: 09/10/2017

Company Name : Z2-IDC Demo Company (Sandbox)
Location Name : Sandbox Boston

Classroom / School Directory Report

Classroom Name : Green Room

Child Name	Birthdate	Parent #1 Contact Phone	Parent #1 Contact Email	Parent #2 Contact Phone	Parent #2 Contact Email	Child's Schedule
Ivan, Geofferey	08/05/2005	Teresa Ivan Home: (414) 141-4234 Work: (543) 453-5353 Cell: (234) 323-2424	teresa@beyonduniverse.in	Leander Ivan Home: (252) 225-2525 Cell: (245) 525-2352	lea@beyonduniverse.in	
Joseph, Alexander	01/01/2010	Gabriel Anthony Home: (124) 566-7768 Work: (124) 566-7768 Cell: (124) 566-7768	gabriel_anthony@beyonduniverse.in	Daniel James Home: (124) 566-7768 Work: (124) 566-7768 Cell: (124) 566-7768	daniel_james@beyondunivers e.in	

3. Classroom Capacity Planning Report

Access Path: Family Accounting → Reports → Classroom Capacity Planning Report

Page 1 of 24

Date Printed: 09/10/2017

Company Name : Z2-IDC Demo Company (Sandbox)

Classroom Capacity Planning Report

Classroom Name: Green Room

Name	Mon		Tue		Wed		Thu		Fri		Sat		Sun	
	am	pm	am	pm	am	pm	am	pm	am	pm	am	pm	am	pm
Student														
R. Smith, Lillian (01/02/2003)	X	X	X	X	X	X	X	X	X	X				

4. Enhanced: Delete Unused Funding Account

Parents can now delete the unused (0%) funding account by themselves.

Access Path: Parent Portal

>> Manage Tuition Auto Pay (TAP)

[Update Payment Percentage](#) [Disenroll TAP](#) [Add New Funding Account](#)

Funding Account Name	Account Holder Name	Date Enrolled	Account/Card Number	Payment Type	Payment Percentage	Action
Juanita_Card	Juanita Walker	04/08/2017	XXXXXXXXXX	Card	0%	Replace Edit Delete
Juanita_ACH	Juanita Walker	04/08/2017	XXXXXXXXXX	ACH	100%	Replace

Click 'Delete' to delete the unused funding account. A confirmation message will be displayed, click Ok to confirm and delete the funding account.

5. Enhanced: Manage Parent Account

The Company Admins / Super users can now manage the parent account details similar the other user details.

Access Path: Administrative Functions → Mange Users → Manage Parent Account



A screenshot of the 'Manage Parent Account' search form. The page has a dark blue header with the text '> > Manage Parent Account'. Below the header, on the left, is a blue link '<< Back'. The main content area is light blue and contains a section titled 'Parent Account Search'. Under this title, there are four search criteria: 'First Name' with a text input field, 'Last Name' with a text input field, 'User Email' with a text input field, and 'Status' with a dropdown menu showing 'Active'. To the right of these is a 'Location Name' dropdown menu showing 'ALL'. At the bottom right of the search criteria is a grey button labeled 'Search'.

Enter the relevant search criteria and click **Search**.

>> Manage Parent Account

[Back](#)

Parent Account Search

First Name Location Name

Last Name

User Email

Status

Click Edit to edit the parent details.

Search Results

Name	User Email	Location Name	Status	Action
Adam Smith	adam.s@beyonduniverse.in	Sandbox Boston	Active	Edit

>> Add / Edit Parent Account

[Back](#)

*First Name *Last Name

*User Email *Password ***** [Change Password](#)

*Status

User Associated Families

No.	Center Name	Famil Acct Key	Parent 1 Name	Parent 2 Name	Child Name	Family Status
1	Sandbox Boston	SMITH	Adam Smith	Mary Smith		Active

Tuition Auto Pay (TAP) Details - Sandbox Boston

No.	Funding Account Name	Account Holder Name	Date Enrolled	Account/ Card Number	Payment Type	Payment Percentage
1	CC Account	Mary Smith	08/04/2017	XXXXXXXX1111	Card	100%

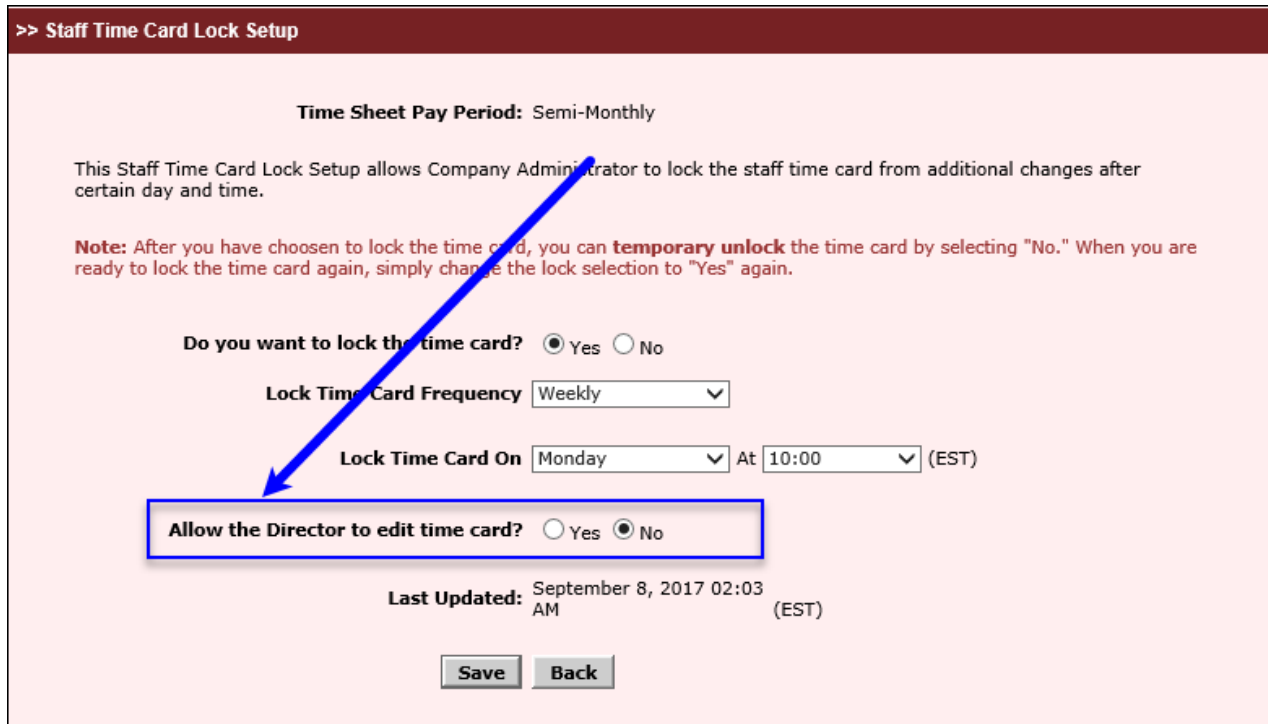
User can update the First name, Last name, User Email, Password and Status.

6. **New:** Edit Staff Time Card by Location Directors

The users can now select if the location directors can edit the staff time card.

A new option 'Allow the Director to Edit time card?' is added in Staff Time Card Lock Setup page.

Access Path: Administrative Function → Staff Record / Time Sheet → Staff Time Card Lock Setup



>> Staff Time Card Lock Setup

Time Sheet Pay Period: Semi-Monthly

This Staff Time Card Lock Setup allows Company Administrator to lock the staff time card from additional changes after certain day and time.

Note: After you have chosen to lock the time card, you can **temporary unlock** the time card by selecting "No." When you are ready to lock the time card again, simply change the lock selection to "Yes" again.

Do you want to lock the time card? ☒ Yes ☐ No

Lock Time Card Frequency Weekly ▼

Lock Time Card On Monday ▼ **At** 10:00 ▼ (EST)

Allow the Director to edit time card? ☐ Yes ☒ No

Last Updated: September 8, 2017 02:03 AM (EST)

1. By default, this will be 'Yes'.
2. If no is selected,
 - a. In Staff Time Card Page, Action column will be hidden
 - b. Treatment selection will be disabled
 - c. Add/Edit Time Sheet section will be hidden
 - d. In Staff PTO details page, Action column and Add/Edit PTO section will be hidden.

7. Enhanced: Online Forms – Parent Uploaded Forms

Earlier, only the Location Directors can access the forms uploaded by the parents in that location.

Now users of all roles can access the Parent Uploaded forms.

Access Path: Online Forms → Parent Uploaded Forms

Home Feedback Help Logout

OnCare DEMO Forms

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 Forms

Sandbox Boston

>>View Forms

[Back](#)

Search Criteria

Select Category Registration ▾

Start Date 04/03/2017 ▾

End Date 04/13/2017 ▾

Submit

Select the relevant search criteria to view the parent uploaded forms


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

@ 2017 OnCare. All rights reserved. OCO 3.2.2 Today: April 12, 2017

Now, **Uploaded By / Modified By** details introduced in the 'List Uploaded Forms' page





>> List Uploaded Forms

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

View Active

No.	Category	Form Name	Status	Uploaded By	Action
1	Registration	Summary Info	Active	Hareesh	Edit View
2	Registration	Location forms	Active	Hareesh	Edit View

Access Path: Online Forms → List Uploaded Forms → Edit



>> Upload Form

[Back](#)

Uploaded By

Hareesh

Uploaded Date

03/28/2017

Last Modified By

Paul

Last Modified Date

05/25/2017

Form Name

Summary Info

Description

Chilf Information