OnCare Office Version   3.3.1

Release Notes: Sep 11, 2017

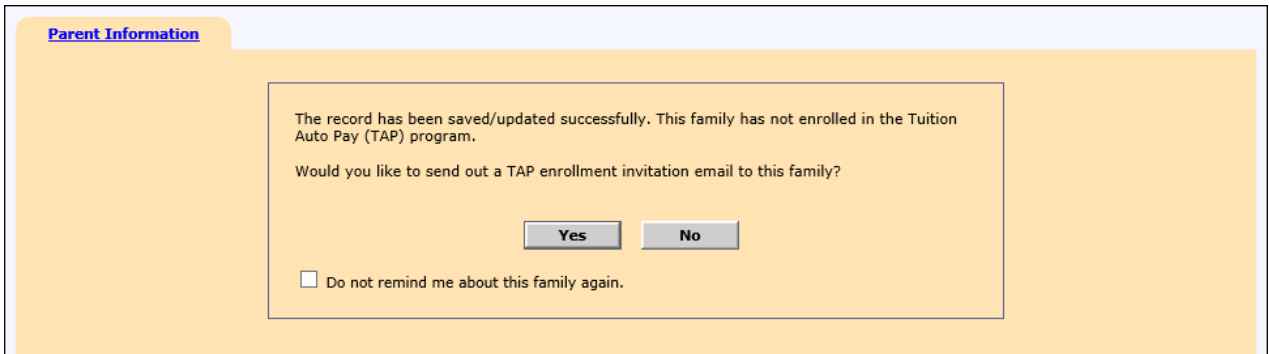**Customer Features:**

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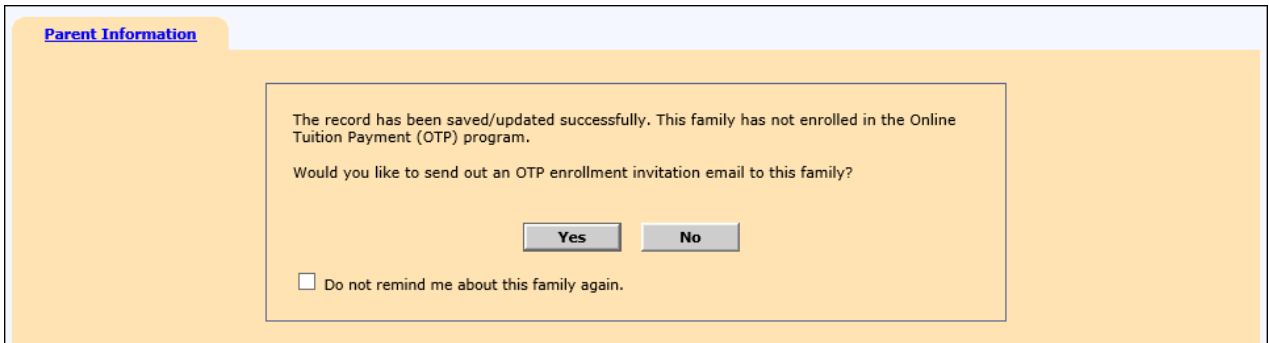
Access Path: Family Accounting →Family Records → Edit Family Record

TAP only:

OTP (TAP and TPD):

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

Existing 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

2. **Classroom / School Directory Report**

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

3. **Classroom Capacity Planning Report**

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

4. Enhanced: Delete Unused Funding Account

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

Access Path: Parent Portal

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

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

> > Manage Parent Account

Parent Account Search

First Name [Adam]   Location Name [ALL ▾]
Last Name [ ]
User Email [ ]
Status [Active ▾]

[Search]

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

*First Name [Adam]   * Last Name [Smith]
* User Email [adam.s@beyonduniverse.in ×]   *Password ****** Change Password

* Status [Active ▾]

[Save]

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

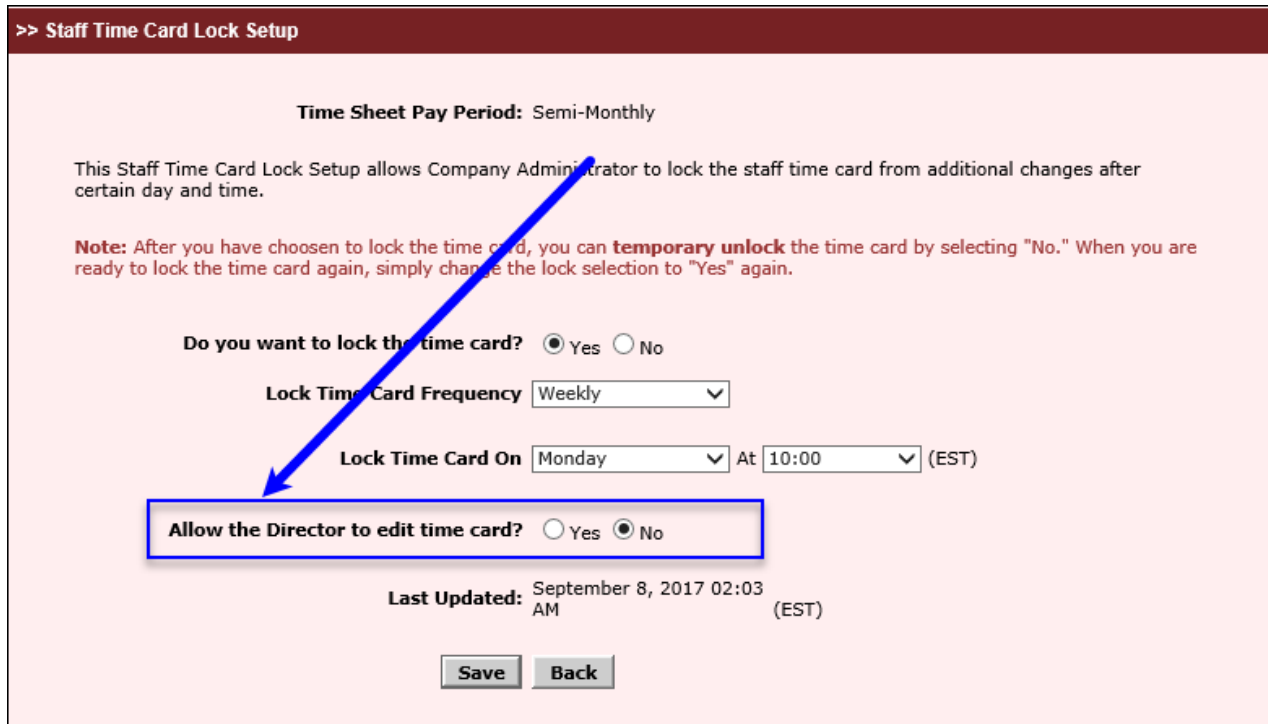| No.	Funding Account Name	Account Holder Name	Date Enrolled	Account/Card Number	Payment Type	Payment Percentage
1	CC Account	Mary Smith	08/04/2017	XXXXXXX1111	Card	100%

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

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

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

Access Path: Online Forms → List Uploaded Forms →Edit