



OnCare Office Version 3.3.2 E4

Release Notes: Jan 06, 2018

Customer Features:

#	Type	Module	Description	Pg
1	Enhanced	Family Accounting	Now users can automate the TAP payment processing	1
2	Enhanced	Family Accounting	The provider Tax ID will now be printed in the Parent receipts also	7
3	Enhanced	Emails	Default message text in the email templates	8

1. Enhanced: Automatic TAP Processing

Users can now process the TAP Payments automatically.

This feature will be available for the centers that are enabled with TAP and is based on company and center level configuration.

Access Path: Administrative Functions → Family Accounting → Billing Configuration – company

>> Billing Configuration - company level

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Please configure the applicable billing setup for your company below:

Billing Type ☒ Program Schedule Based ☒ Attendance Based ☒ No School (Childcare Only) Billing

Attendance Based Billing ☒ Before Care ☒ After Care ☒ Drop-In Care
☒ Early Drop-Off ☒ Late Pickup ☒ Non-Scheduled Hours

Billing Cycle ☒ Monthly ☒ Weekly

Pro-Rated Billing ☐ Monthly ☐ Weekly

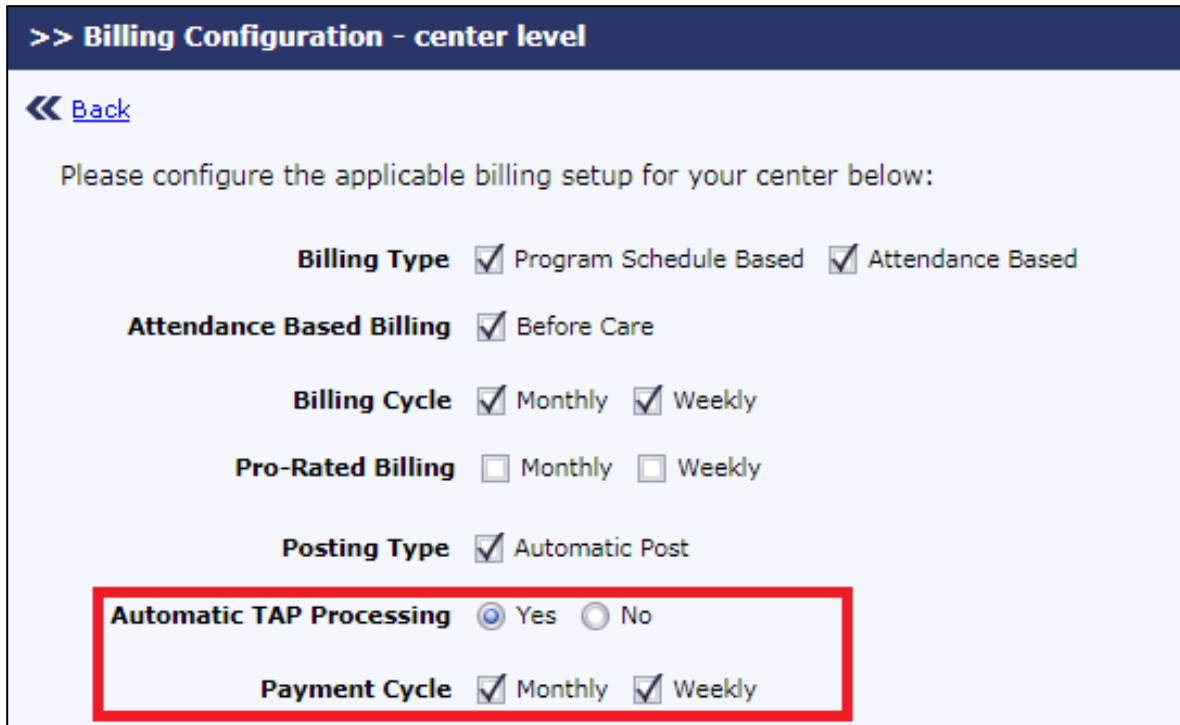
Posting Type ☒ Automatic Post ☒ Review Before Post

Automatic TAP Processing ☒ Yes ☐ No

Payment Cycle ☒ Monthly ☒ Weekly

The “Automatic TAP Processing” option should be turned on (Yes) and at least one “Payment Cycle” should be selected. Once this is turned on at the Company level, this will be available for selection at the center level.

Access Path: Administrative Functions → Family Accounting → Billing Configuration – center level



>> Billing Configuration - center level

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Please configure the applicable billing setup for your center below:

Billing Type ☒ Program Schedule Based ☒ Attendance Based

Attendance Based Billing ☒ Before Care

Billing Cycle ☒ Monthly ☒ Weekly

Pro-Rated Billing ☐ Monthly ☐ Weekly

Posting Type ☒ Automatic Post

Automatic TAP Processing ☒ Yes ☐ No

Payment Cycle ☒ Monthly ☒ Weekly

1. When “Automatic TAP Processing” option is turned on for a center, it also turns it on automatically for all the parents who are currently enrolled in TAP
2. When any one of the “Payment Cycle” is selected, the same cycle is applied for all the parents. When both are selected, “Weekly” is applied to the respective parents.
3. For new parents, the Automatic TAP Processing and billing cycle will be automatically turned on as they enroll in TAP.

Access Path: Family Accounting → Family Records → Parent Info

The Director can change “Automatic TAP Processing” to “No” at Parent Level when requested by the parents.



Payment Info

Automatic TAP Processing ☒ Yes ☐ No

Payment Frequency


Online Payment TAP-ACH **Online Payment** Not Enrolled

Automatic TAP Processing:

A new option 'Automatic TAP Processing' is added in the Tuition Auto Pay (TAP) page for this purpose.

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 Batches](#)
- [4. Automatic TAP Processing](#)



TAP Enrollment

Total Active Families	7
Total Active Payors	9
Total Active Payors Enrolled in TAP	3
Total Active Payors Not Enrolled	6

[TAP Enrollment](#)

>> Automatic TAP Processing

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[Add New](#)

Setup Automatic TAP Recurring payment rules to process the TAP payments and post it to the account ledgers.

Automatic TAP Processing will run between 4:00 PM EST and 5:00 PM EST.

Click Add new to add a new automatic payment rule.

Automatic TAP Processing Rule

Payment Cycle	Payment Date / Day	Payment Processing		Status	Action
		Last Processed Date	Upcoming Processing Date		
Weekly	Every Wednesday		01/03/2018	Active	Edit

There can be only a maximum of 2 recurring payment rule, one for each payment cycle i.e. Weekly or Monthly.

In this summary page, user can see the date payment was processed earlier and the date payment will be processed next.

Monthly Frequency:

>> Add Automatic TAP Processing Rule

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Automatic TAP Processing will run between 4:00 PM EST and 5:00 PM EST.

Select Payment Frequency

Date of Automatic Payment Processing

Email receipt to Parent ☐ Yes ☒ No

Rule Status

Save

4. Select the payment frequency.
5. Select the date on which payment need to be processed every month.
6. Select whether to send email receipt to the parents or not.
7. Select the rule status.
8. Click **Save** to add the new recurring payment rule.

Weekly Frequency:

>> Add Automatic TAP Processing Rule

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Automatic TAP Processing will run between 4:00 PM EST and 5:00 PM EST.

Select Payment Frequency

Day of Automatic Payment Processing

Email receipt to Parent ☐ Yes ☒ No

Rule Status

Save

1. Select the payment frequency.
2. Select the day on which payment need to be processed every week.
3. Select whether to send email receipt to the parents or not.
4. Select the rule status.
5. Click **Save** to add the new recurring payment rule.

Edit Access to Directors:

Currently directors have edit access to the Automatic TAP Processing Rules. If this must be disabled, then this permission can be turned off in the Role Management.

Access Path: Home → Role Management

Role Management				
Back				
Add New Role			View Active	
Role Name	Location	Status	Permission	Display Order
Customer Support	Multiple	Active	View	▲ ▼
Company Super User	Multiple	Active	View	▲ ▼
Company Admin	Multiple	Active	View	▲ ▼
Location Director	Single	Active	View Permission	▲ ▼
Staff	Single	Active	Edit	▲ ▼

>> Add/Edit Director Permission

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* Allow Directors to manage their own classrooms ☒ Yes ☐ No

* Allow Director to Upload Forms ☒ Yes ☐ No

* Allow Director to Edit Classroom ☒ Yes ☐ No

* Allow Director to Edit TAP Automatic Recurring Payment ☒ Yes ☐ No

* Allow Director to Process TAP Automatic Payment ☒ Yes ☐ No

* Allow Director to Add New Family ☒ Yes ☐ No

* Allow Director to Add New Child ☒ Yes ☐ No

Save

2. Enhanced: Tax ID in Parent Receipts

The provider Tax ID will now be included in the Parent Receipts.

OnCare Sandbox Center 377 Aviation Way Los Angeles, AL - 11525		
<u>Payment Receipt</u>		
Date: 01/04/2018	Provider Tax ID: 1375-01	Receipt#: 01041827
Parent Name: Gary R.Hall		Child Name: Nolan Adrian
Description Payment-ACH	Transaction Id RP00110000007071	Fee \$3.94
		Total \$3.94
Thank You!		

3. Enhanced: Default message is Mail Templates

Now the default message for the respective email templates will only be displayed when opened. Earlier the last modified customized message was only displayed by default.

If the user wants to select the previously modified message, then they must select the 'Show last modified message option' below the message box.

If the user selects the 'Show last modified message' option but there is no modified message in that center, then the default message will be displayed in EDIT mode.

This change has been done in the below pages/features:

Family Accounting:

1. Online Tuition Payment Enrollment Invitation
2. Send Parent Portal Invitation (Both Existing and New Family)
3. Send Account Statement from Automatic Recurring Billing Review page
4. Send Family Invoice

Batch Email:

5. Send Reminder email
6. Send account statement
7. Send Year End Tax statement

Enrichment Program:

8. Send Class Roster to vendors by email

From OnCare Sandbox Center

Subject Tuition Auto Pay (TAP) Only Enrollment Invitation

Message

This is a reminder that our center offers **Tuition Auto Pay (TAP)**, an online tuition payment program. The program removes the hassles of writing checks to pay for tuition. Also, you never have to worry about paying for late charges. We encourage all our parents to take advantage of Tuition Auto Pay (TAP) so we can spend less time in administration and spend more time with your children.

You can enroll in Tuition Auto Pay (TAP) via the OnCare Parent Portal. If you have any question about registering or logging into the OnCare Parent Portal or the enrollment process, please let me know.

Regards,
Director
OnCare Sandbox Center

☐ Show last modified message

Note: The system will automatically insert a link for Parent Portal Registration / Login at the bottom of the email

Send **Clear**