



Parent Portal – UI Revamp

Feb 24, 2018

Contents

1	Introduction	3
2	Login Page	3
3	Home Page	4
4	Family and Child Menu	5
5	Payment Menu.....	5
6	Forms Menu	6
7	Family Page	6
8	Child Page.....	7
9	Manage TAP Settings	8
9.1	Add New Funding Account.....	9
9.2	Edit Funding Account	10
9.3	Recurring Payment Schedule	11
9.4	Update Payment Percentage	11
10	Download Account Statement / Year End Tax Statement	12
11	Forms	12
11.1	Upload Forms	12
11.2	View Forms.....	12

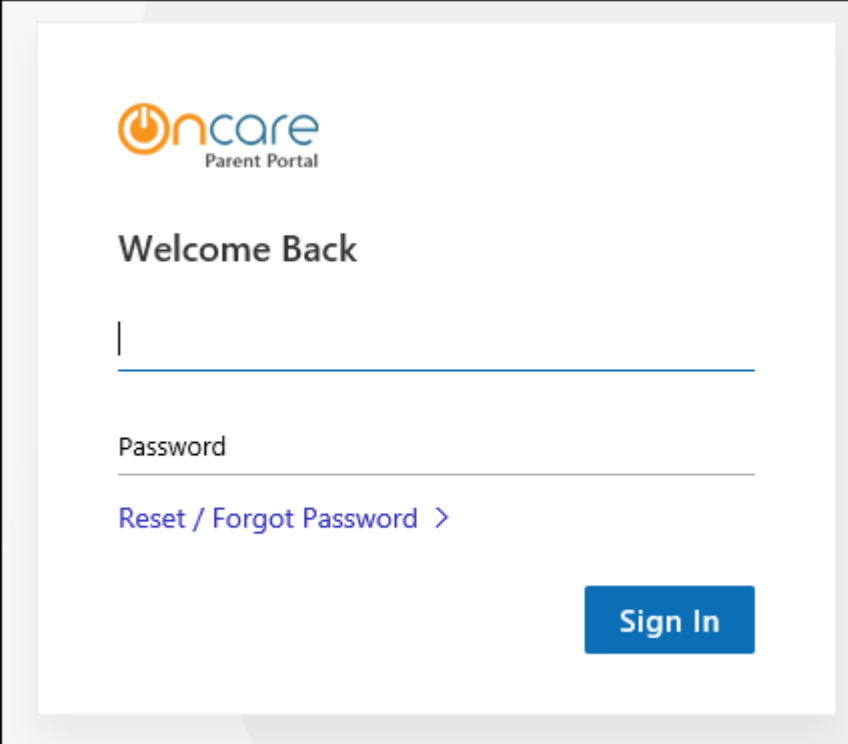
1 Introduction

User Interface of OnCare Parent Portal has been completely revamped. Also, now it is mobile compatible.

The screenshots of the new interface are given below.

All the features except for Camp/Events are now mobile optimized. Camp/Events will be optimized for mobile in the next release.

2 Login Page



The screenshot shows the login page of the OnCare Parent Portal. At the top left is the OnCare logo, which consists of an orange power button icon followed by the text "oncare" in blue and "Parent Portal" in a smaller, grey font below it. Below the logo, the text "Welcome Back" is displayed in a bold, dark grey font. Underneath this, there are two input fields: the first is for the username, indicated by a vertical line on the left, and the second is for the password, with the label "Password" to its left. Below the password field is a link that says "Reset / Forgot Password >" in blue text. At the bottom right of the form is a blue rectangular button with the white text "Sign In". The entire login form is enclosed in a light grey border.

3 Home Page

The screenshot shows the 'Home' page of the 'Sandbox Boston' system. The interface includes a top navigation bar with 'Home', 'Questions', and 'Logout' links. A left sidebar contains a menu with 'Family', 'Child', 'Payment', 'Forms', 'Camp/Event', and 'Download'. The main content area is divided into sections: 'Tuition Payment' showing a current balance of \$1,257.50, 'Child' listing three children (Gerald Sepulveda, Lois Brant, Steve Larson) with associated icons for adding and editing records, and 'TAP Payments' displaying a table of recent payments.

Home

Tuition Payment

Current Balance
\$1,257.50

Child

Gerald Sepulveda
Lois Brant
Steve Larson

TAP Payments

Date	Description	Status	Amount
03/27/2017	TAP Card Payment		\$189.41
03/26/2017	TAP ACH Payment		\$200.01

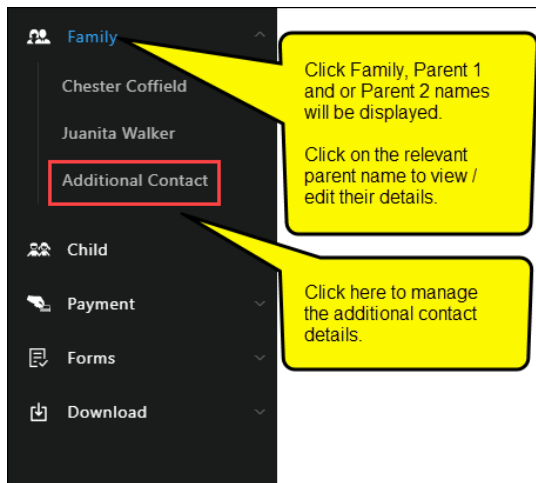
Callouts:

- Click here to Manage TAP / TPD settings (points to a gear icon in the Tuition Payment section)
- Click here to add new child record (points to a plus icon in the Child section)
- Click here to edit child record (points to a pencil icon in the Child section)
- Click here to view the TAP / TPD payment details (points to a magnifying glass icon in the TAP Payments section)

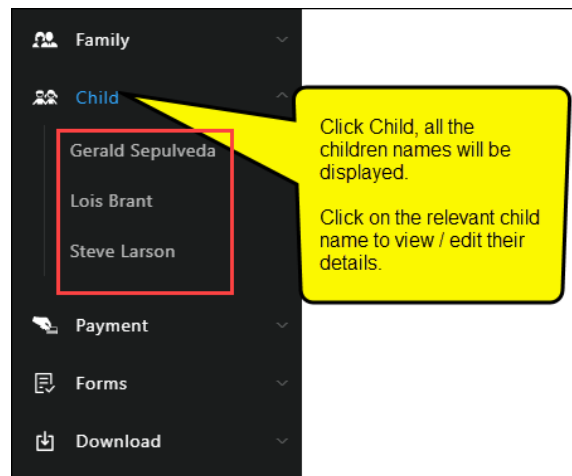
Footer: © 2017 OnCare. All rights reserved. OCO 3.2.2 Today: February 19, 2018

4 Family and Child Menu

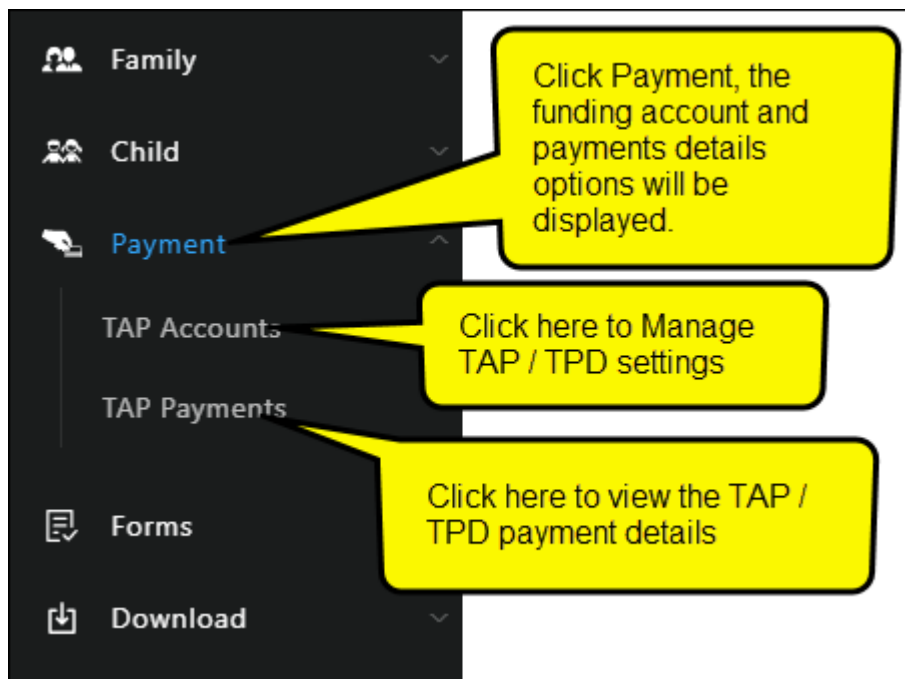
Family Menu



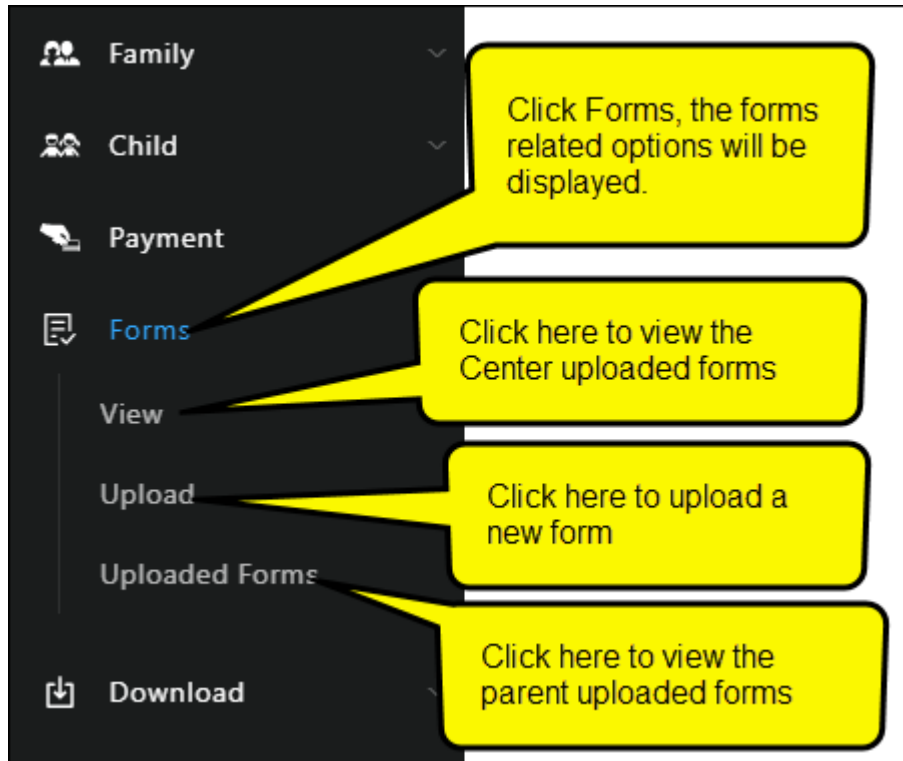
Child Menu



5 Payment Menu



6 Forms Menu



7 Family Page

LILA Family

Basic Info

First Name	Middle Name
Lila	
Last Name	Email
Sites	lila_sites@beyonduniverse.in
Cell Phone	Emergency Contact
() - -	<input checked="" type="radio"/> Yes <input type="radio"/> No

Home Address

Home Phone


Work Address

Phone

SAVE

8 Child Page

Center Information



Paul A. Jolley

Edit >

Date of Birth01/02/2001

Age17.1 Years

Gender

StatusActive

Browse

Center Info

Health

Contact

Restricted Person

CENTER INFORMATION

Enrollment Start Date

Primary Classroom

Ethnicity

Class A

Select here...


Age Group

Not Assigned

Child ID Code

SAVE

Health Info



Paul A. Jolley

Edit >

Date of Birth01/02/2001

Age17.1 Years

Gender

StatusActive

Browse

Center Info

Health

Contact

Restricted Person

DOCTOR INFORMATION

Name

Telephone

Email Address

Doctor

Dentist

Hospital

ALLERGY / MEDICATION / SPECIAL DIETS INFORMATION

Allergy


Medication

Special Diets

Individual Family Service Plan (IFSP)

No

SAVE



Paul A. Jolley

Date of Birth

01/02/2001

Age

17.1 Years

Gender

Status

Active

Browse

Center Info

Health

Contact


Restricted Person

EMERGENCY CONTACT/AUTHORIZED PICKUP

	Name	Relationship	Home Phone	Cell Phone	Email	Address
#1				() _ _ _		
#2				() _ _ _		
#3				() _ _ _		
Pickup 1				() _ _ _		
Pickup 2				() _ _ _		

Notes

SAVE



Paul A. Jolley

Date of Birth

01/02/2001

Age

17.1 Years

Gender

Status

Active

Browse



Center Info

Health

Contact

Restricted Person

ADD NEW

No.	First Name	Last Name	Description	Action
1	Adam	Willkinson	Not permitted	 

9 Manage TAP Settings




Manage Tuition Pay Direct (TPD)

Following are the functions available to manage your Tuition Pay Direct (TPD) account

Recurring Payment Schedule

Disenroll TPD

Add New Funding Account

No.	Funding Acct Name	Acct Holder Name	Date Enrolled	Acct Card Number	Payment Type	Payment Percentage	Action
1	Sophiya_1st card	Sophia Rojo	04/11/2017	XXXXXXXXXX	Card	75%	 
2	Sophiya_2nd card	Sophia Rojo	04/11/2017	XXXXXXXXXX	ACH	25%	

9.1 Add New Funding Account

Tuition Auto Pay (TAP) Enrollment

Dear Parent,

Thank you for enrolling in the Tuition Auto Pay (TAP) program.

With TAP, you enroll once and give authorization to the center to draft your account. This is the total hassle free option.

TAP helps us save time in administration so we can spend more time with your children.

You can enroll in TAP using your Bank Account (ACH) or Credit/Debit card.

You can add any number of funding accounts and split the payment among them.

If you choose to use a credit/debit card, there is service fee associated to TAP. The service fee for credit/debit cards is shown below.

Bank Account (ACH)

1.00

Credit Card

2 %

You can choose your payment method in the next page.

BACK

NEXT

Create TAP Funding Account

Select Payment Type

☐

Checking/Savings Account

☐

Credit/Debit Card

Name of Funding Account

Enter a name to identify this funding account (e.g. John Chase Visa)

< BACK

NEXT

Create TAP Funding Account

Bank Account Type

☐ Checking Account ☐ Savings Account

Account Holder Name

Routing Number

Account Number

Re-Enter Account Number

< BACK

SUBMIT

CANCEL

The diagram shows a check with the following fields labeled:

- NAME**: Address, City, State, ZIP
- DATE**
- 0123** (top right)
- 01-23456789** (middle right)
- PAY TO THE ORDER OF**
- \$** (amount)
- DOLLARS**
- BANK NAME**: Address, City, State, ZIP
- FOR**
- Bank Routing Number**: 00 1234567890
- Bank Account Number**: 01 2345678901234
- Check Number**: 0123

9.2 Edit Funding Account

Edit Tuition Auto Pay (TAP) Account

Name of Funding Account

Lila

Card Holder Name

Card Holder Name

Card Number

Card Type

Card Expiry:

Month Year

Address

Zip

< BACK

SUBMIT



9.3 Recurring Payment Schedule

TPD - Manage Recurring Payment Schedule

UPDATE PAYMENT PERCENTAGE

No.	Funding Account	Account Holder	Date Enrolled	Account #	Account Type	Payment %
1	Sophiya_1st card	Sophia Rojo	04/11/2017	XXXXXXXXXX	Card	75%
2	Sophiya_2nd card	Sophia Rojo	04/11/2017	XXXXXXXXXX	ACH	25%

Following is the active recurring payment schedule you have setup

Frequency	Recurring On	Start Date	End Date	Last Payment Date	Next Payment Date	Action
Monthly	15th	04/11/2017			03/15/2018	 

TPD - Edit Recurring Payment Schedule

UPDATE PAYMENT PERCENTAGE

No.	Funding Account	Account Holder	Date Enrolled	Account #	Account Type	Payment %
1	Sophiya_1st card	Sophia Rojo	04/11/2017	XXXXXXXXXX	Card	75%
2	Sophiya_2nd card	Sophia Rojo	04/11/2017	XXXXXXXXXX	ACH	25%

1 In setting up a recurring payment schedule, you specify the frequency, start date and end date. The amount will be the ledger balance of the effective date. The recurring payment schedule will trigger the tuition payment automatically. You can edit or delete the recurring payment schedule at any time.

Recurring Payment Schedule

Frequency
Monthly

Recurring On
15

Start Date
04/11/2017

End Date
Optional

Payment Amount
Pay Ledger Balance

SUBMITCANCEL

9.4 Update Payment Percentage

TPD - Edit Recurring Payment Schedule

No.	Funding Account Name	Payment Type	Payment Percentage
1	Sophiya_1st card	Card	75%
2	Sophiya_2nd card	ACH	25%

SAVECANCEL

10 Download Account Statement / Year End Tax Statement

Account Statement


Select Dates

Select a period ▼

From MM/DD/YYYY 📅To MM/DD/YYYY 📅

Report Type

☒ Pdf ☐ Html

 SUBMIT

11 Forms

11.1 Upload Forms

Upload Form

Name


Forms Category


Select Here... ▼

Description

Upload Form

Select a file... Browse...

 Only **pdf, doc, docx, txt, ppt, pptx, xls,xlsx, jpg, jpeg and png** format.

 SUBMIT

11.2 View Forms

Parent Uploaded Forms					
No.	Category	Form Name	Description	Uploaded Date	Download
1	Admin	Registration	Registration Form	02/23/2018	