Oncare

Quick Start Guide for Company Admins

www.oncarecloud.com

Professional Services

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INTRODUCTION

Thank you for choosing OnCare Office. This quick start guide is intended to help you configure your OnCare Office service after your initial consultation with our Professional Services Consultant. There are a few administrative configurations steps that need to be configured before your OnCare Office is ready for use. For a more detailed explanation of these options and how to configure them, please refer to the help guide located within your OnCare Office service. If you have any further questions or need additional assistance; please contact your OnCare Services Professional Consultant.

This guide outlines which tasks the company administrator should complete before the system is live. The company administrators and location directors both share common rights and access to OnCare, but the company administrator is responsible for configuring options on a company-wide basis whereas the location director is limited to their specific location. For more information on the different levels of access please refer to the help guide.

Depending on your business needs, you do not need to configure all of these options. Some tasks will require other tasks to be completed first. The list below identifies the mandatory configurations that are needed while the other configurations tasks are optional but will help you save time.

Mandatory Configurations

- Manage Center Director Users

- Edit Center Billing Setup

- Automatic Recurring Posting Setup

- Classroom Setup

1. MANAGE CENTER DIRECTOR USERS

*Mandatory configuration

This configuration allows you to create logins for your Location Directors or the persons that will be managing your location. These logins allow the Location Directors to access OnCare Office to perform Location Level functions such as creating family child information and managing the account ledgers.

From the Admin Homepage;

1. Click on **Administrative Functions.**

2. Click on **Manage Users**.

3. Click on **Add New User**.

4. Enter the **First Name**, **Last Name**, and **Email** address.

5. Enter the **User Name** and **Password.**

6. In the **Role Name** drop down menu; select **Location Director**. Click **Save**.

7. Repeat steps 3-6 to create additional Center Director users.

2. ADD/EDIT G/L ACCOUNTS

*This configuration might be necessary depending on company configuration.

This configuration allows you to manage the General Ledger Accounts. *If you are unsure if your organization uses G/L Accounts, please refer to your accountant or bookkeeping service for more information.*

From the Admin Homepage;

1. Click on **Administrative Functions**.

2. Click on **Add/Edit G/L Accounts**.

3. Enter the **G/L Account Number** and **Description**.

4. Click **Save**.

5. Repeat Steps 3 and 4 to create additional G/L Accounts.

3. EDIT CENTER BILLING SETUP

*Mandatory configuration

Before you can post transactions to the Account Ledger for each family; you must first configure the billing items that will be used. There are 5 different transaction types available in OnCare Office:

- *Tuition Charges*

- *Other Charges*

- *Credit*

- *Payments*

- *Balance Forward*

Each location must have their billing items configured individually. To configure a company-wide billing items list, you must contact your OnCare Professional Services Consultant during the initial deployment of your service.

The following are the default billing items created by OnCare:

- **Other Charges** – *Agency Transfer Charge*

- **Other Charges** – *Deposit Charge*

- **Other Charges** – *Electronic transaction failure (Fatal)*

- **Other Charges** – *Electronic transaction failure (Ineligible)*

- **Other Charges** – *Parent Refund*

- **Credit** – *Agency Adjustment Credit*

- **Credit** – *Agency Transfer Credit*

- **Credit** – *Deposit Refund*

- *Payment* – *Cash*

- *Payment* – *Check*

- **Payment** – *Credit Card*

- *Payment* – *POS Payment Check*

- *Payment* – *POS Payment Credit Card*

- *Payment* – *POS Refund Check*

- *Payment* – *POS Refund Credit Card*

- *Payment* – *Web Payment Check*

- *Payment* – *Web Payment Credit Card*

- *Payment* – *Web Refund Check*

- *Payment* – *Web Refund Credit Card*

- **Balance Forward** – *Balance Carry Forward*

From the Admin Homepage;

1. Click on **Administrative Functions**.

2. Click on **Edit Center Billing Setup**.

3. Click on the **Select a Center** dropdown menu and select the location you would like to configure.

4. Click on **Transaction Type** and select the transaction type you would like to configure.

5. Enter the **Description** and **Standard Amount.**

6. Select the **G/L Account** number to be used.

7. Click **Save**.

8. Repeat steps 3-6 to create additional billing items.

4. PROGRAM SETUP

*This configuration might be necessary depending on our business needs

This configuration allows the management of programs that are associated with your organization. You can designate if programs are considered company-wide or if they are specific to each location.

Once a program has been created and assigned to a child, the option to create programs at a company level or center level are disabled.

From the Admin Homepage;

1. Click on **Administrative Functions**.

2. Click on **Program Setup**.

3. **Is Program Field Mandatory?** Please select **YES** or **NO** and then click on **Add New Program**. *This selection will require all children to be associated with a program.*

4. Enter the name of the program.

5. Click **Save**.

6. Repeat step 4 and 5 to create additional programs.

5. WITHDRAWAL REASON SETUP

 *This configuration might be necessary depending on our business needs

This configuration allows you to manage withdrawal reasons to track the reasons why a child withdraws from the school. This can help your school manage their enrollments more effectively.

From the Admin Homepage;

1. Click on **Administrative Functions**.

2. Click on **Withdrawal Reason Setup**.

3. Select *Company Level* or *Center Level* in the **Withdrawal Reasons Level** section.

4. Select *Yes* or *No* in the **Make Withdrawal Reason a requirement when a withdrawal date is entered** section.

5. Click **Save**.

6. Click **Add New Reason**.

7. Enter the *withdrawal reason* in the **Withdrawal Reason** field.

8. Click **Save**.

9. Repeat steps 6-8 to create additional Withdrawal Reasons.

6.   CHILD QUESTION SETUP

 This configuration might be necessary depending on our business needs

Schools often ask families questions about the children, or obtain approvals and permissions. The child question setup allows administrators to configure these questions that may be asked of each child.

From the Admin Homepage;

1. Click on **Administrative Functions**.

2. Click on **Child Question Setup**.

3. Select *Company Level* or *Center Level* in the **Child Question Configuration** section.

4. Click **Save**.

5. Click on **Add New**.

6. Enter the *question* in the **Child Question** field.

7. Click **Save**.

8. Repeat steps 5-7 to create additional questions.

7.   EMPLOYERS SETUP

This configuration might be necessary depending on our business needs

This configuration allows you to manage the list of employers that your families are employed at.

1. Click on **Administrative Functions**.

2. Click on **Employers Setup**.

3. Click on **Add/Edit Employers**.

4. Click on **Add New**.

5. Enter the *employer information*.

6. Click **Save**.

7. Repeat steps 4-6 to create additional employers.

8. AUTOMATIC RECURRING POSTING SETUP

*Mandatory configuration

The automatic recurring posting setup engine automatically posts tuition charges to the families' ledger account on a monthly or weekly basis.

From the Admin Homepage;

1. Click on **Family Accounting**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. Click on **Setup**.

4. Click on **Automatic Recurring Posting Setup**.

5. Select the Default Billing Cycle (**Weekly** or **Monthly**).

6. Click **Edit** to change the configuration of either Weekly or Monthly Billing cycles.

For Monthly Billing Cycle:

a. Select the date of the month you want for the **Post Date** in the drop down menu.

b. Select if you want the run date to be the same as the post date or select how many days prior to the post date.

c. Select if you want to use **Monthly Multipliers**. *The monthly multiplier will take the standard tuition and multiply it using the decimal value entered. For example, if the multiplier is .80, the system will take the standard tuition charge and multiply it by .80 for the given month. This feature allows you to automatically adjust the tuition charges throughout the year.*

d. Click **Save**.

For Weekly Billing Cycle:

a. Select the day of the week you want for the **Post Date** in the drop down menu.

b. Select if you want the run date to be the same as the post date or select how many days prior to the post date.

c. Click **Save**.

7. Click to select **Automatic billing and posting for Summer Camp**.

8. Click to select **email reminder before system runs automatic billing**.

9. Click **Save**.

9. CHILD SCHEDULE TEMPLATES

*This configuration might be necessary depending on our business needs

The child schedule templates provide the ability to configure pre-determined schedules to be associated to each child.

From the Admin Homepage;

1. Click on **Family Accounting**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. **Select the Location** you would like to configure in the drop down menu and click **Continue**.

4. Click on **Setup**.

5. Click on **Child Schedule Templates**.

6. Enter the name of the schedule you want to create.

7. Configure the scheduled Days and Times.

8. Click **Save**.

9. Repeat steps 6-8 to create additional schedule templates.

10. ADD/EDIT 3RD PARTY AGENCIES

*This configuration might be necessary depending on our business needs

This section allows you to configure Agencies used for subsidized billing. When an agency is created; an agency ledger will be also be created. This feature allows you to manage transactions between the sponsors and agencies for accounting purposes.

From the Admin Homepage;

1. Click on **Family Accounting**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. Click on **Setup**.

4. Click on **Add/Edit 3rd Party Agency**.

5. Click on **Add New**.

6. Enter the Agency's information in all of the fields.

7. Click **Save**.

8. Repeat steps 6-8 to create additional agencies.

11. CLASSROOM SETUP

*Mandatory configuration

This section allows you to create classrooms that will be used to assign children to. Classrooms are managed at the location level.

From the Admin Homepage;

1. Click on **Family Accounting**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. Click on **Setup**.

4. Click on **Classroom Setup**.

5. Click on **Setup.**

6. **Is Primary Classroom Mandatory?** Select **YES** or **NO**.

7. Click on **Add New**.

8. Enter the name of the Classroom.

9. Click Save.

10. Repeat steps 8-10 to create additional classrooms.

12. BUS RUN SETUP

*This configuration might be necessary depending on our business needs

This configuration allows you to create a report that can be used to associate if a child belongs to a specific bus run.

From the Admin Homepage;

1. Click on **Family Accounting**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. Click on **Setup**.

4. Click on **Bus Run Setup**.

5. Click on **Add New**.

6. Enter the name of the **Bus Run**.

7. Click **Save**.

8. Repeat steps 6-8 to create additional bus runs.

13. IMMUNIZATION SETUP

*This configuration might be necessary depending on our business needs

This configuration allows you to setup the immunization schedules that are due for each child.

From the Admin Homepage;

1. Click on **Family Accounting**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. Click on **Setup**.

4. Click on **Immunization Setup**.

5. Click on **Add New**.

6. Enter the name of the **Immunization/Vaccination**.

7. Enter the date ranges the immunization/vaccination is due.

8. Click **Save**.

9. Repeat steps 6-9 to create additional immunization/vaccinations schedules.

14. CREATE STAFF SCHEDULE TEMPLATE

*This configuration is not necessary, but can save you time when entering staff schedules that are based on standard days and times.

This configuration manages the staff schedules listed in the drop-down menu of the staff record page.

From the Admin Homepage;

1. Click on **Staff Record/Timesheet**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. Click **Setup**.

4. Click on **Staff Schedule Templates**.

5. Enter the **Name of Schedule**.

6. Configure the **Days** and **Times**.

7. Click **Add**.

8. Repeat steps 6-8 to create additional schedules.

15. CREATE STAFF POSITION SETUP

*This configuration might be necessary depending on your business needs

This configuration manages the staff positions listed in the drop-down menu of the staff record page.

 From the Admin Homepage;

1. Click on **Administrative Functions**.

2. Click on **Staff Position Setup**.

3. Enter the Name of the **Position** you would like to create.

4. Click **Add**.

5. Repeat steps 3-4 to create more positions.

16. EMPLOYEE / STAFF

This configuration might be necessary depending on your business needs

This configuration allows you to create and manage staff members. Staff Records are needed in order for them to log in/out of time clock. These records are also used for contact, medical and attendance information. This step is necessary if the user wants to track staff time using the timeclock.

Staff rights include:

- *Launching Time Clock application.*

- *Managing child's time card.*

- *Viewing staff's own time sheet and employment information.*Only if they are given a user login for OnCare Office.*

From the Admin Homepage;

1. Click on **Staff Record/Timesheet**.

2. *If you are a multi-site admin, select the location you wish to configure in the **Select Center** drop down menu.*

3. Click on **Staff Records**.

4. Click on **Add New**.

5. Enter the staff member's information.

6. Click **Save**.

7. Repeat steps 1-5 to create additional Staff members.

Questions?

This guide is intended to help you quickly get started in configuring your OnCare Office service to meet your business needs. If you have additional questions or need any further assistance, please contact us via the following methods:

Email: clientsupport@oncarecloud.com

Toll Free: 1-844-662-2733