OnCare Office Version 3.3.3 E7.2

Release Notes - January 18, 2019

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1 Ability to lock/unlock edits to the Tuition Charge Amount

In the earlier release, OnCare has provided an option to lock/unlock Tuition Charge amounts pertaining to Parent Ledgers.

In this release, Tuition Charge amount pertaining to Agency Ledgers can be locked/unlocked.

When "Lock Standard Tuition Amounts (Tuition Charges)" is set to 'Yes' at the company level, all the Tuition Charges will be locked by default only for the parent/agency ledger. Company admins should follow the above step to release the lock for a location.

Lock Tuition Amount - Configuration:

Location Level:
Access path: Family Accounting → Setup → Billing Item Setup

2 Ability to generate Rollcall sheet with Saturday

OnCare has introduced a way to include a Saturday in the **Rollcall sheet** report.

Selecting **Yes** will include the **Sat (Saturday)** column in the report

3 Ability to add Child Schedule for Saturdays

OnCare has introduced a feature to include Saturdays in the Child Schedules. Schools who wish to have Saturday in their schedules can contact support@oncarecloud.com to enable it.

Once Saturday is enabled, the same can be viewed in the following screens and reports:

Screens:

Access Path: Setup → Child Schedule Templates

Access Path: Child Info → Schedule & Billing

Reports:

Family Accounting → Reports
- Child Care Facility Roster Report
- Classroom/School Directory Report
- Rollcall sheets
- Full Time Equivalency Report
- Classroom Capacity planning report
- Enrollment/Withdrawal report

Family Accounting → Functions
- Data download

Time/Attendance Tracking → Reports
- Contracted vs Actual Hours
- Child Absence based on Child Schedule

Time/Attendance Tracking → Functions
- Group Sign in with Absence alert

4 Online Forms – Admin Features

This section describes in detail on the various features of the Online Forms module.

Please contact support@oncarecloud.com to enable this module.

The following users/roles have access to this module:

1. Company Super User/Admin
2. Regional/Location Director
3. Parents via Parent Portal
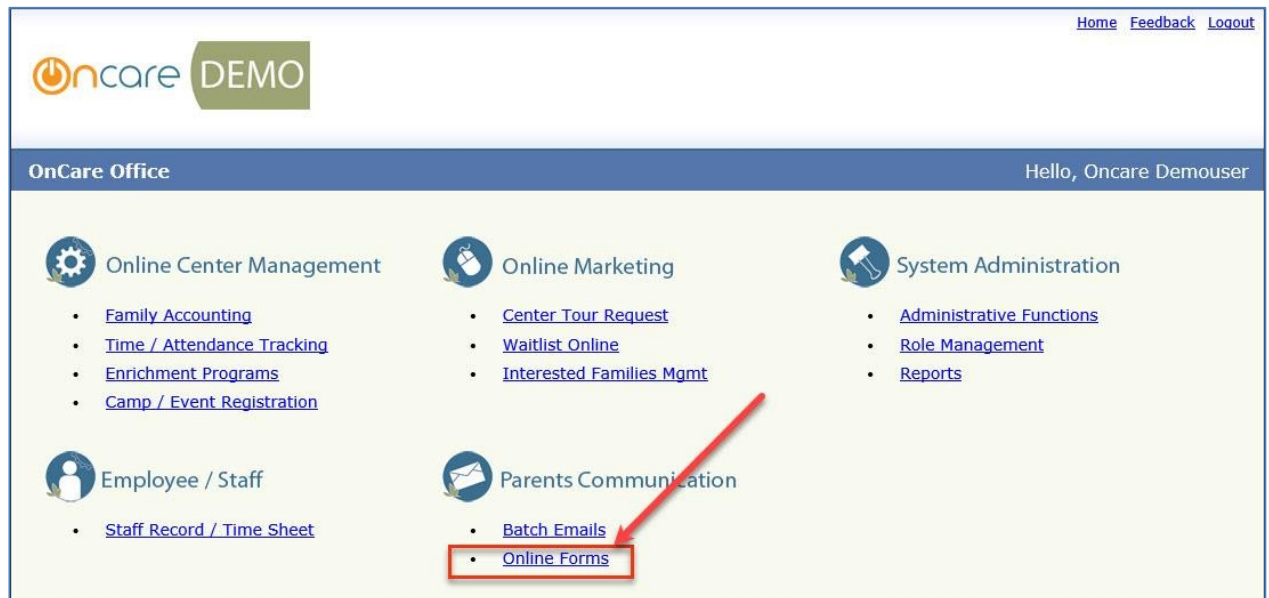
4.1 Company Super User/ Company Admin/ Location Director Features

The company super user/admins have access to the following features in this module:

1. Setup Forms Category
2. Upload Forms
3. View / Edit Forms
4. View Parent Uploaded Forms
5. View Mandatory Forms Status

4.2 Setup Forms Category

Forms Category is designed to organize the online forms. Admin users can setup the same.

Access Path: Parent Communications→Online Forms

Clicking on this link will navigate to the following screen

>> List of Uploaded Forms

Forms Category Setup   Add New Form   Parent Uploaded Forms   Mandatory Forms Status

View [Active ▼]

No.	Form Name	Category	Is Mandatory?	Form Type	Status	Uploaded By	Uploaded On	Action	
1	Child - Contact	Child - Additional Information	Yes	Child	Active	Oncare User	01/11/2019	Edit	View Form
2	Family Contact	Contact Details	Yes	Family	Active	Oncare User	01/11/2019	Edit	View Form
3	Tuition Charges	General			Active	Oncare User	01/11/2019	Edit	View Form

>> Forms Category Setup

Clicking on Add New link will navigate to the following screen to add a new category

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Add New Category

View [Active ▼]

No.	Category Name	Can Parent Upload?	Status	Action
1	Child - Additional Information	Yes	Active	Edit
2	Contact Details	Yes	Active	Edit
3	General	No	Active	Edit

Clicking on Edit link will navigate to category update screen

Choosing **"Yes"** makes the parent to download, fill and upload the form to school.

Choosing "**No**" makes it optional

4.3 Upload Forms

Admins and Location Directors can upload forms for parents.

Access Path: Parent Communication → Online Forms → Add New Form

Clicking on **Add New Form** link will navigate to the following screen to upload a new form

- **Is Mandatory Form** – Parent must upload the completed forms through the parent portal, when "Is Mandatory Form" is Yes.

- **Form Type** – This Form Type option helps to categorize the forms to be of type either family or child. If it is per child, the form has to be filled for each child.

Add New Form form with callouts:

- On selecting a **Category** which is classified as **Parent Upload,** following two new options will be displayed:
  - **Is Mandatory**
  - **Form Type**
- **Yes** makes the parent to download, fill and upload the form to school.

  No makes it optional
- Form categorization option at family or child level

Note:
By default, Location Directors will have access to forms upload. Company Admins can disable the "Upload Forms" access to Location Directors as follows:

Access Path: Home → Role Management → Location Director → Feature Permission

4.4 View / Edit Forms

Admin users can view and edit the already uploaded forms

Access Path: Parent communication → Online Forms → View Form

To view the uploaded forms, click **View Form** against the respective form

Clicking on **Edit** link, will navigate to the following screen to update the existing form

Clicking on **View Upload File,** existing form can be viewed.

4.5 View Parent Uploaded Forms

Access Path: Parent communication → Online Forms

Clicking on **Parent Uploaded Forms** link, the following **View Parent Uploaded Forms** screen will be displayed.

>> List of Uploaded Forms

Forms Category Setup   Add New Form   Parent Uploaded Forms   Mandatory Forms Status

View Active ▼

No.	Form Name	Category	Is Mandatory?	Form Type	Status	Uploaded By	Uploaded On	Action	
1	Child - Contact	Child - Additional Information	Yes	Child	Active	Oncare User	01/11/2019	Edit	View Form
2	Family Contact	Contact Details	Yes	Family	Active	Oncare User	01/11/2019	Edit	View Form
3	Tuition Charges	General			Active	Oncare User	01/11/2019	Edit	View Form

Enter the Search criteria and click on the **Submit** button to view the uploaded forms list by the parents.

>>View Parent Uploaded Forms

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View Forms - Select Criteria

Select Center   Select Here...   ▼
Select Forms Category   ▼
From Date   01/07/2019   ▼
To Date   01/17/2019   ▼

Submit

>>View Parent Uploaded Forms

« Back

View Forms - Select Criteria

| Center Name SandBox | | | Category Name Child - Additional Information | | | |
| From Date 01/07/2019 | | | To Date 01/17/2019 | | | |

No.	Family Acct Key	Parent 1 Name	Parent 2 Name	Form Name	Description	Uploaded On	Action
1	BEARD	Jennifer Beard	Bob Beard	Child - Contact	Contact Details updated	01/11/2019	View Form
2	BELTRAN	Mary Beltran	Francisco Beltran	Child - Contact	Contact Updated	01/11/2019	View Form
3	BRIGHAM	Pam Brigham	Matt Brigham	Child - Contact	Alexander	01/11/2019	View Form

4.6 Parent's Form Uploaded Status and Reminder Emails

From **Mandatory Forms Status**, schools can view the count of parents / child(ren) 'who has uploaded forms' and 'who has not uploaded forms' category wise.

Uploaded count provides the option to drill down to view the list of parents / child(ren) who has uploaded the forms and the same can be downloaded.

Not Uploaded count provides the option to drill down to view the list of parents who has not uploaded the forms. Also, reminder emails can be sent to such parents.

Access Path: Parent Communications → Online Forms → Mandatory Forms Status

>> List of Uploaded Forms

Forms Category Setup   Add New Form   Parent Uploaded Forms   Mandatory Forms Status

View Active ▼

No.	Form Name	Category	Is Mandatory?	Form Type	Status	Uploaded By	Uploaded On	Action	
1	Child - Contact	Child - Additional Information	Yes	Child	Active	Oncare User	01/11/2019	Edit	View Form
2	Family Contact	Contact Details	Yes	Family	Active	Oncare User	01/11/2019	Edit	View Form
3	Tuition Charges	General			Active	Oncare User	01/11/2019	Edit	View Form

Forms will be grouped by the category.

>> Mandatory Forms Status

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Select Center   SandBox   ▼

Submit

Clicking on this count navigates to **List of Families Not Uploaded <Form Name>** screen which is shown below

Form Category: Contact Details

No.	Form Name	Form Type	Effective From	End Date	Is Mandatory?	Total Families	Total Children	Uploaded	Not Uploaded
1	Family Contact	Family	01/01/2019		Yes	15	17	3	12

Form Category: Child - Additional Information

No.	Form Name	Form Type	Effective From	End Date	Is Mandatory?	Total Families	Total Children	Uploaded	Not Uploaded
1	Child - Contact	Child	01/01/2019		Yes	14	16	3	13

Clicking on this count navigates to **List of Families Uploaded <Form Name>** screen which is shown below

List of Families who has Uploaded Forms

Form Type – Child Level

>> List of Families Uploaded Child - Contact

Center SandBox	**Category** Child - Additional Information
Form Name Child - Contact	**Form Type** Child
Effective From 01/01/2019	**End Date**

No.	Family Acct Key	Parent 1 Name	Parent 2 Name	ChildName	Form Name	Description	Uploaded On	Action
1	BEARD	Jennifer Beard	Bob Beard	Joshua Beard	Child - Contact	Contact Details updated	01/11/2019	View Form
2	BELTRAN	Mary Beltran	Francisco Beltran	Nina Beard	Child - Contact	Contact Updated	01/11/2019	View Form
3	BRIGHAM	Pam Brigham	Matt Brigham	Alexander Boon-Bysrov	Child - Contact	Alexander	01/11/2019	View Form

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Form Type – Family Level

>> List of Families Uploaded Family Contact

Center SandBox	**Category** Contact Details
Form Name Family Contact	**Form Type** Family
Effective From 01/01/2019	**End Date**

No.	Family Acct Key	Parent 1 Name	Parent 2 Name	ChildName	Form Name	Description	Uploaded On	Action
1	BEARD	Jennifer Beard	Bob Beard	Joshua, Benny	Family Contact	Mom's Conatct Details Updated	01/11/2019	View Form
2	BELTRAN	Mary Beltran	Francisco Beltran	Nina	Family Contact	Family Contact Updated	01/11/2019	View Form
3	BRIGHAM	Pam Brigham	Matt Brigham	Alexander	Family Contact	Alexander's Contact Details	01/11/2019	View Form

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List of Families who has not Uploaded Forms

Form Type – Child Level

This screen lists the parents who hasn't uploaded the mandatory forms. Reminder emails can be sent to them at child level that specifies which child was not uploaded with the form.

>> List of Families Not Uploaded "Child - Contact" - Send Reminder

	Center Boston			Category Child - Additional Information	
	Form Name Child - Contact			Form Type Child	
	Effective From 01/01/2019			End Date	

No.	Sel. ☐	Family Acct Key	Parent Name	Child Name	Relationship Type	Email
1	☐	BARTLEY	Alexis Gutierrez	Brown Bartley	Parent #1	alexistgutierrez_form@beyonduniverse.in
2	☐	ELLEN	Ellen Connolly	Rebecca Connolly	Parent #1	katiemconnolly_form@beyonduniverse.in
3	☐	KAUFFMAN	Kauffman Jennifer	DeMunter Jennifer	Parent #1	jakauffman_form@beyonduniverse.in

Back   **Next**

Form Type – Family Level

This screen lists the parents who hasn't uploaded the family mandatory forms. Reminder emails can be sent to them.

>> List of Families Not Uploaded "Family Contact" - Send Reminder

	Center Boston			Category Contact Details	
	Form Name Family Contact			Form Type Family	
	Effective From 01/01/2019			End Date	

No.	Sel. ☐	Family Acct Key	Parent Name	Child Name	Relationship Type	Email
1	☐	BARTLEY	Alexis Gutierrez	Brown	Parent #1	alexistgutierrez_form@beyonduniverse.in
2	☐	ELLEN	Ellen Connolly	Rebecca	Parent #1	katiemconnolly_form@beyonduniverse.in
3	☐	KAUFFMAN	Kauffman Jennifer	DeMunter	Parent #1	jakauffman_form@beyonduniverse.in

Back   **Next**

Note: Parent records will be displayed based on the Email Preference set at Family Records.

Online Form Submission Reminder - Email Template:

Child - Contact Online Submission Reminder   (5 k)

Oncare

SandBox   01/17/2019

Dear Renee,

This is a reminder email to submit the form Child - Contact online.

Please login to your parent portal account and go to Forms section to upload the signed form.

Please click here to download the formChild - Contact
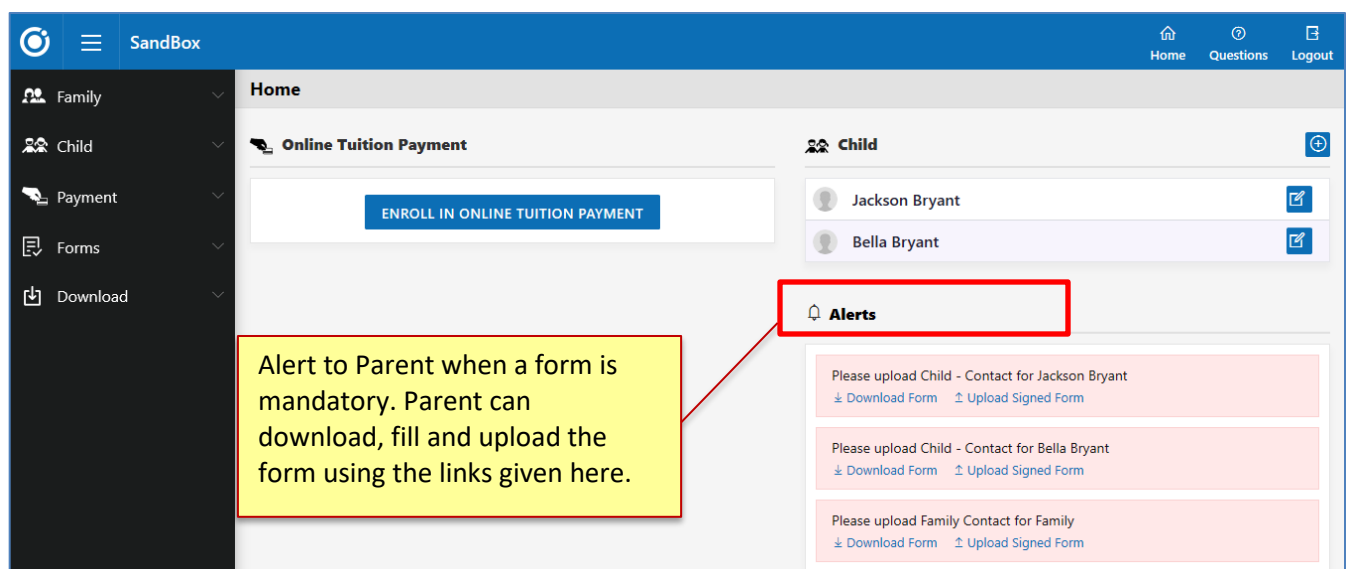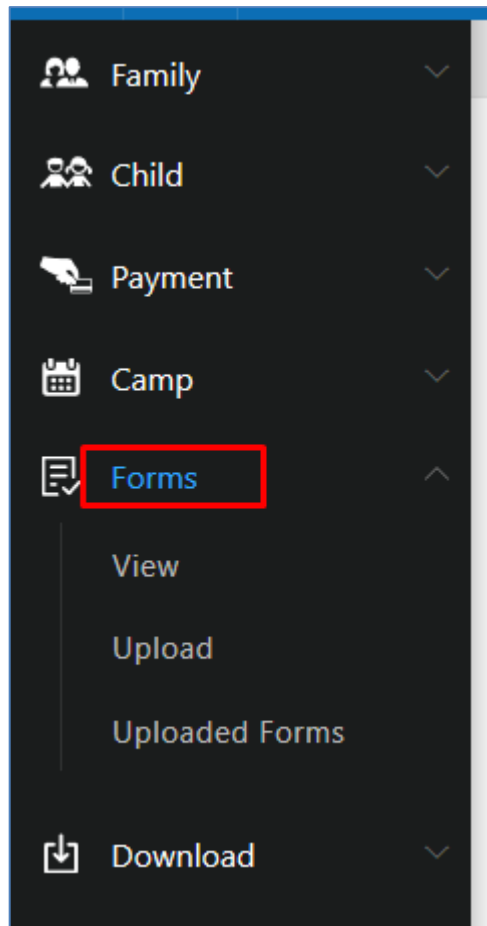
Regards,

Oncare

Company Super User

SandBox

For parents who HAVE NOT yet registered with OnCare Parent Portal, click here to register.

If you have already registered with OnCare Parent Portal, Click here to login.

5   Online Forms - Parent Features (in Parent Portal)

Parents have the following features in the Online Forms module
- View the forms uploaded by the schools
- Upload the completed forms
- View the forms uploaded by the parents

Alert to Parent when a form is mandatory. Parent can download, fill and upload the form using the links given here.

5.1 View Forms

Parent can view all the forms that are uploaded by the school.

Access Path: Forms → View

List of Forms

No.	Form Name	Description	Form Category	Form Type	Is Mandatory?	Action
1	Child - Contact	Please update the child contact details	Child - Additional Information	Child	Yes	⬇ Download Form
2	Family Contact	Update the family contact information	Contact Details	Family	Yes	⬇ Download Form
3	Tuition Charges	Find the revised fee details	General			⬇ Download Form

5.2 Upload Forms

Parent can upload the forms in two ways:

a. Forms → Upload

b. Dashboard → Alerts

Upload Forms via Menu:

Upload Forms via Alerts for Child:

Upload Forms via Alerts for Family:

Once filled forms are uploaded, respective alerts will be removed from the dashboard

5.3 View Uploaded Forms

Parents can view the uploaded forms in the following screen

Access Path: Forms → Uploaded Forms

Family level forms will be grouped under the **Family Forms** header.

Child level forms will be grouped by each child.