



OnCare Office Version 3.3.3 E10.1

April 29, 2019

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1 Program Enrollment – Provision to waive reg. fee

Now, OnCare has provided an option for the center admins to waive the registration fee while adding a program in Family Accounting.

Access Path: Family Accounting → Child Record → Program & Billing → Add New Program

The screenshot shows the 'Add/Edit Program' form with the following details:

- Child's Age at the time of Enrollment:** 7.11 Years
- Age Group:** Two Years
- Enrollment Start Date:** 01/01/2019
- Selected Program:** Two Years-Full Day-3 Days
- Fee:** \$200.00 (Monthly)
- Days Offered:** M, W, F
- Program Timings:** 08:30 AM - 03:00 PM
- Current Registration Fee:** \$50.00
- Do you want to waive off registration fee for this family?** Yes No
- Updated Registration Fee:** \$0.00

A yellow callout box points to the waiver option with the text: "Registration fee will not be applied for the child when **Yes** is selected."

Buttons for "Back" and "Save" are located at the bottom of the form.

2 TAP – Ability to Configure TAP disenrollment text

OnCare provides the ability to configure TAP disenrollment text.

When TAP disenrollment by parent is disabled, the following message will be displayed. This message can be customized by admins.

The screenshot shows the 'Manage Tuition Auto Pay (TAP) Account' interface. A table lists TAP accounts, with one account in a 'Disenroll' state. A custom error message is displayed over the table:

Funding Account	Account Holder	Date Enrolled	Account #	Account Type	Payment %	Action
Live account			XXXX	Card	100%	

The error message box contains the text: "Please contact the School Director for TAP Disenrollment" and an "OK" button.

Access Path: Administrative Functions → Manage Centers → Configuration

Center Information	
Company ID 1358	Location ID 3
Company Name Z1-OnCare - Payment Providers	Status <input checked="" type="radio"/> Active <input type="radio"/> Inactive
* Location Name <input type="text" value="Card Connect"/>	Regional ID <input type="text"/>
Location Number <input type="text"/>	Location Tax ID <input type="text" value="1358-3"/>
Accounting ID <input type="text"/>	License Capacity <input type="text"/>
* Time Zone (UTC-08:00) Pacific Time (US & Canada) <input type="text"/>	
Program Hours From <input type="text"/> To <input type="text"/>	

Center Address	
Geofencing Attendance Required <input type="radio"/> Yes <input checked="" type="radio"/> No	
Select Address <input type="text" value="Southfield j Oregon"/>	
Address Southfield	City j
State Oregon	Zip 15963

Center Director Information	
* First Name <input type="text" value="Karthik"/>	* Last Name <input type="text" value="Oncare Cloud USer"/>
Title <input type="text"/>	* Email <input type="text" value="PP_PROD_CC@beyonduniverse.in"/>
Phone <input type="text"/>	Fax <input type="text"/>

Configuration	
Allow Posting of Agency Payments from Family Record? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Apply NSF Fee? <input checked="" type="radio"/> Yes <input type="radio"/> No	
Billing Description <input type="text" value="NSF"/>	Standard Amount <input type="text" value="\$1.00"/>
G/L Account <input type="text" value="9999"/>	G/L Account Description Acct To Be Determined (sys generated)
Instructions to the Parents who wants to Disenroll from TAP <input type="text" value="Please contact the School Director for TAP Disenrollment"/>	

3 Summer Camp Enhancements

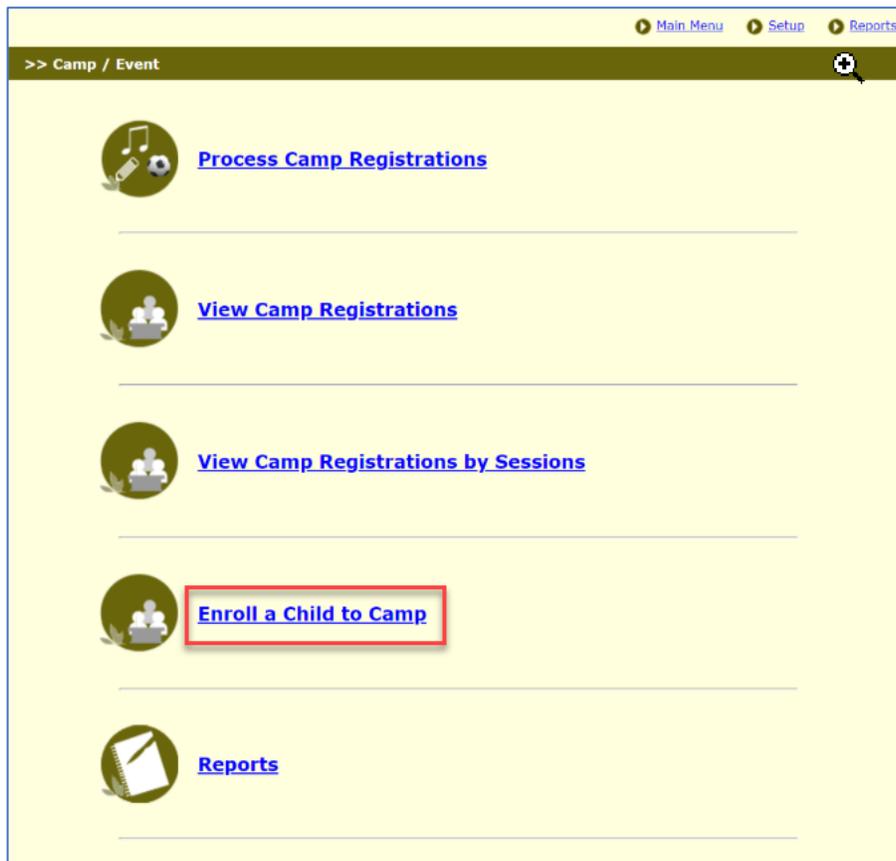
OnCare has enhanced the Summer Camp with the following features:

- Ability for Admins to Enroll a Child to Camps
- Provision to Collect the Registration fee either at Family level or Child level
- Generate Authorized Person ID Code
- Sessions can be added for the incomplete Registrations
- Ability to apply different camp fee categories using Tags

3.1 Ability for Admins to Enroll a Child to Camps

Now Camp Admins can enroll a child to a camp by themselves.

Access Path: [Camp/Event Registration](#) → [Select Center](#) → [Enroll a Child to Camp](#)



>> Camp Registration

Parent — Child — Sessions — Confirmation

Select Family

Select Camp / Event: Summer Camp 2019 (Grade 2-3) (Current)

Select Family Type:
 New Family
 Existing Family

Back Next

Click here to enroll new child

Click here to enroll the existing child

>> Camp Registration for Summer Camp 2019 (Grade 2-3)

Parent — Child — Sessions — Confirmation

Primary Contact

+ Add Secondary Contact (Optional)

First Name: Raiza Last Name: Warne
 Email: raiza_11@beyonduuniverse.in Confirm Email: raiza_11@beyonduuniverse.in
 Mobile Phone: (467)-676-8798
 Address: 5 Second Lane
 State: California

Enter Parent details.
 Secondary Contact can also be added by clicking **Add Secondary Contact**

How many children you want to enroll?

Select: 1

Back Next

>> Camp Registration for Summer Camp 2019 (Grade 2-3)

Parent — **Child** — Sessions — Confirmation

Child Details

First Name:
 Last Name:

Gender: Boy Girl
 Date of Birth:

Grade entering for the next School Year:

Child Details can be entered here

Camp Registration for Summer Camp 2019 (Grade 2-3)

Parent — **Child** — **Sessions** — Confirmation

Select Sessions for (Tom Warne)

Session is full Registered Session

Select	Session Name	Session Date	Session Time	Days Offered	Grade	Fee
<input checked="" type="checkbox"/>	Session 1	04/15/2019 - 07/31/2019	7:00 AM - 3:00 PM	M,Tu,W,Th,F	1st Grade - 4th Grade	\$ 100.00
<input type="checkbox"/>	Week 1		10:00 AM - 3:00 PM			\$50.00
<input checked="" type="checkbox"/>	Session 2	04/15/2019 - 07/31/2019	7:00 AM - 3:00 PM	Sa,Su	1st Grade - 4th Grade	\$ 15.00
<input type="checkbox"/>	Session 3	08/01/2019 - 08/09/2019	8:00 AM - 12:00 PM	M,W,F	1st Grade - 5th Grade	\$ 50.00
<input type="checkbox"/>	Week 1		10:00 AM - 3:00 PM			\$50.00
<input type="checkbox"/>	Session 4	08/26/2019 - 08/31/2019	8:00 AM - 1:00 PM	Tu,F	1st Grade - 5th Grade	\$ 25.00
<input type="checkbox"/>	Week 1	07/01/2019 - 07/05/2019	8:00 AM - 3:00 PM	M,Tu,W,Th,F	1st Grade - 5th Grade	\$ 50.00
<input type="checkbox"/>	Week 1		10:00 AM - 3:00 PM			\$50.00
<input type="checkbox"/>	Week 2	07/08/2019 - 07/12/2019	8:00 AM - 3:00 PM	M,W,F	1st Grade - 5th Grade	\$ 50.00
<input type="checkbox"/>	Week 3	07/22/2019 - 07/26/2019	8:00 AM - 3:00 PM	M,Tu,W,Th,F	1st Grade - 5th Grade	\$ 50.00
<input type="checkbox"/>	Week 4	07/29/2019 - 08/02/2019	8:00 AM - 3:00 PM	Tu,Th	1st Grade - 5th Grade	\$ 50.00

Select Sessions

Clicking Next will redirect to the Session Confirmation page.

>> Camp Registration for Summer Camp 2019 (Grade 2-3)

Parent Child Sessions Confirmation

Parent Info Edit

Primary Contact

First Name: Raiza Last Name: Warne

Mobile Phone: (467) 676-8798 Email: raiza_11@beyonduniverse.in

Address: 5 Second Lane City: calagary

State: California Zip: 26576

Child Info Add New Child

#	First Name	Last Name	Date of Birth	Gender	Grade	Action
#1	Tom	Warne	01/02/2014	Boy	1st Grade	Edit

Session Summary Edit

Tom Warne

Session	Date	Time	Fee	Multi-Session	Sibling	Amount Due
Session 1	04/15/2019 - 07/31/2019	7:00 AM - 3:00 PM	\$100.00	-	-	\$100.00
Session 2	04/15/2019 - 07/31/2019	7:00 AM - 3:00 PM	\$15.00	-	-	\$15.00

Session Fees: \$115.00
 One Time Registration Fee: \$30.00
 Total Fees: \$145.00

Special Notes To Director / Coordinator

Parent, Child and Session details can be edited by clicking these links

New child can be added by clicking this **Add New Child** or Admin can complete the enrollment by clicking on the **Submit** button.

Click **Submit** to enroll the child and the corresponding record will be created in Family Accounting.

>> Camp Registration for Summer Camp 2019 (Grade 2-3)

Parent Child Sessions Confirmation

The family and child record have been successfully added to the Family Accounting module in OnCare.

Click **Done** to send a confirmation email to the parent

Note: OnCare will not collect the payment methods (TAP/TPD/Direct Payment) through this process of enrolling the child. Parents are responsible to get themselves enrolled for online payment once after when they register in OnCare Parent Portal.

Sample Confirmation Email:

★ Summer Camp 2019 (Grade 2-3) Registration Confirmation
(6 k) < >

Sent: 12:06 pm
To: Raiza

Center 4
04/25/2019

Summer Camp 2019 (Grade 2-3)

Registration Confirmation

Dear Raiza,

We have processed your initial registration. In this email, you will find a link to create a Parent Portal account.

In order for registration to be complete, Please fill the Parent and Child Information in the parent portal.

You can setup Bank Transfer (ACH) and Credit Card payment in the Parent Portal to make payments online.

Click here to register online: <http://test.oncareoffice.com/ParentPortal/ParentRegistration.aspx?IKEY=e066f08c-7062-4f8c-afbf-7eed1d4c7e7b>

If you have any questions regarding Summer Camp 2019 (Grade 2-3), please email sonelly@beyonduniverse.in or call (654) 454-3423.

Thank you,
Sonelly
Center 4

>> Process Camp Registrations

<< [Back](#)

Select Camp / Event Summer Camp 2019 (Grade 2-3) (Current)

Pending Incomplete Approved

No.	Parent Name	Submitted On	Enrolled Children	Total Sessions	Total Fees	Amount Paid	Payment Ref.	Action
1	Raiza Warne	04/26/2019	1	2	\$145.00	-- --	-- --	View
2	Ben c	04/26/2019	1	2	\$50.00	-- --	-- --	View
3	Henry Joseph	04/26/2019	1	2	\$145.00	-- --	-- --	View

The enrolled family details and the camp fee will reflect in Family Accounting as shown in the screen shot below:

>> Family Ledger Card Details

<< [Back](#)

Quick lookup: [All](#) | [A-B](#) | [C-D](#) | [E-F](#) | [G-H](#) | [I-J](#) | [K-L](#) | [M-N](#) | [O-P](#) | [Q-R](#) | [S-T](#) | [U-V](#) | [W-X](#) | [Y-Z](#)

Family: [Add New](#) | [Edit](#) | [Children Summary](#) | [Search](#) | [Select](#) | [Info Sheet](#) | [Authorized Person](#) | [Family Notes](#) | [Acct Stmt](#)

Family Account Key : WARNE < Prev Next >

Sponsor : Raiza Warne

Child First Name : Tom

Payor	Today's Bal.	Pending Bal.	Payment
Sponsor	\$ 30.00	\$ 145.00	N/A

Show Ledger All Hide Void Card Swipe Payment Post Ledger Item ?

Ledger	Posting Date	Check #	Description	Billing Period	Comments	Child Name	Charges	Credit	Balance	Action	
Sponsor	04/26/2019		Summer Camp Deposit		Summer Camp 2019 (Grade 2-3)	Tom	\$ 30.00		\$ 30.00	Void	
									Today's Bal.	\$ 30.00	

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Future Ledger Postings (Pending Balance):

Sponsor	05/31/2019		Session 1		04/15/2019 - 07/31/2019	Tom	\$ 100.00		\$ 130.00	Void
Sponsor	05/31/2019		Session 2		04/15/2019 - 07/31/2019	Tom	\$ 15.00		\$ 145.00	Void

3.2 Provision to Collect the Registration fee either at Family level or Child level

New configuration is introduced to collect the Registration fee either at Family level or at Child level.

Access Path: Camp/Event Registration → Setup → Camp/Event Setup

>> Camp / Event Setup

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Program Setup

Program Name

Program Coordinator

Email

Phone

Registration Start Date

Registration End Date

Is Current? Yes No [?](#)

Camp / Event Type

Deposit at the Registration Yes No

Registration Type Director Authorized Self Registration

Grade Validation Required in Session Yes No

One Time Registration Fee Yes No

Registration Fee Per Family Per Child

Description

Amount

Cc Registration Confirmation To Location Director Program Coordinator

Registration fee can be collected either at family level or child level

3.3 Generate Authorized Person ID Code

OnCare generates the Authorized person ID Code automatically for the parent who is enrolling through Summer Camp

Access Path: Family Accounting → Select Family Record → Authorized Person

>> Add / Edit Authorized Person Details

[Back](#)

Family Account Key WAYNE Parent #1 Name Diana Wayne

First Name

Middle Name

Last Name

Relationship

ID Code

Status

Not Authorized for these child(ren) Anna

Authorized Person ID Code generated automatically

Authorized Person Details [Print](#) View

No	Name	Relationship	ID Code	Status	Not Authorized	Action
1	Diana Wayne	Parent 1	1013	Active		Edit

3.4 Sessions can be added for the incomplete Registrations

Now, Sessions can be added under incomplete registrations only when parent and child information was provided.

>> Process Camp Registrations

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Select Camp / Event

Pending Incomplete Approved

No.	Parent Name	Started On	Email	Phone Number	Enrolled Children	Total Sessions	Action
<input type="checkbox"/> 1	Riaza Wayne	04/26/2019	raiza_10@beyonduniverse.in	(466) 767-8687	1	1	View
<input type="checkbox"/> 2	Christie John	04/25/2019	christie_20@beyonduniverse.in	(468) 787-9809	1	0	View
<input type="checkbox"/> 3	Kathleen Fuller	04/25/2019	kulper1234@beyonduniverse.in	(645) 857-8695	1	0	View
<input type="checkbox"/> 4	Henry Joseph	04/15/2019	henry_21@beyonduniverse.in	(656) 787-6879	1	0	View
<input type="checkbox"/> 5	Sarah Brendon	04/12/2019	sarah_20@beyonduniverse.in	(238) 745-8458	1	2	View

>> Family Registrations Management

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Parent Info Edit

Primary Contact

First Name Henry	Last Name Joseph
Mobile Phone (656) 787-6879	Email henry_21@beyonduniverse.in

Director can add the sessions

Child Info Add New Child

	First Name	Last Name	Date of Birth	Gender	Grade	Action
#1	Sandra	Joseph	04/16/2014	Girl	1st Grade	Select Session Edit

[Delete](#)

3.5 Ability to apply different camp fee categories using Tags

Tags management is introduced in Summer Camp to apply different fees for the same camp. This can be done while registering for camps for the existing children who are mapped with tags.

Steps for the using tags management are given below:

- a. Create the tags at Company Level
- b. Assign the required tags at the Camps and Sessions
- c. Associate the tags to the child under Child Info page of Family Accounting

During the camp registration, fees will be applied based on the tags.

3.5.1 Create the tags at Company Level

Access Path: Administrative Functions → Tags Management → Add New Tag

Others

- [Module Configuration](#)
- [Parent Portal Url](#)
- [Child Absence Reason Codes Setup](#)
- [Security Settings](#)
- [Camp / Event Type](#)
- [Manage Announcements](#)
- [Email Templates Management](#)
- [Tags Management](#)

Add / Edit Tags
✕

Tag Name

Tag Description

Tag Status Active ▼

Click **Save** to create the Tag Name, Description and Status

3.5.2 Assign the required tags for Camps and Sessions

Admin can select the required tags to the corresponding Camps, from the Tags added at the company level.

Access Path: [Camp/Event Registration](#) → [Setup](#) → [Camp/Event Setup](#)

>> **Camp / Event Setup**
[Camp Settings](#)

[<< Back](#)

Program Setup

Program Name

Program Coordinator

Email

Phone

Registration Start Date 03/11/2019 ▼

Registration End Date 05/10/2019 ▼

Is Current? Yes No ?

Camp / Event Type Summer Camp ▼

Deposit at the Registration Yes No

Registration Type Director Authorized Self Registration

Grade Validation Required in Session Yes No

One Time Registration Fee Yes No

Registration Fee Per Family Per Child

Description Summer Camp Deposit ▼

Amount

Cc Registration Confirmation To Location Director Program Coordinator

Associated Tags Camp Tag ✕ Child Tag ✕ ?

Camp Level: Select the Tags required for this camp

Session Details

Gender Boy Girl Both

Day(s) Offered Mon Tue Wed Thu Fri Sat Sun

Session Start Date

Session End Date

Session Time From To

Session Grade From To

Maximum Slots

Status

Fees Setup

Billing Description

Payment Due Date

Regular Session Fees

Select the Tags and Setup Special Fees

Select	Tag Name	Fees
<input checked="" type="checkbox"/>	Camp Tag	<input type="text" value="\$10.00"/>
<input type="checkbox"/>	Child Tag	<input type="text" value="\$0.00"/>

Session Level: Select the Tags required for this session

3.5.3 Associate the tags to the Child Record

To apply a different camp fees for a child, the record needs to get mapped with the available tags

Access Path: Family Accounting → Child Records → Child FN

Family Account Key < Prev Next >

Parent Information | **Child Information**

Child Selection:

Selected	Name	Age	Status	Action
<input checked="" type="checkbox"/>	Bret C	15 Months	Active	Select Program & Billing Immunization Time Card Delete
<input type="checkbox"/>	Sara c Michel	12 Months	Active	Select Program & Billing Immunization Time Card Delete

[Add New Child](#)

Child Information

First Name M

Last Name

Date of Birth

Enrollment Start Date

Primary Classroom

Age Group

School

Student ID

Child ID Code

Ethnicity

Secondary Classroom

Grade

Child #

Status

Select the tags applicable for this child.



Tags

[Back](#)

Parent Info

Primary Contact

First Name
Ben

Mobile Phone
(633) 567-8999

For the children enrolled in Family Accounting:

While doing camp registration, OnCare will check for the tags mapped for the child.

If tag(s) are mapped, fee associated with the tag(s) will be applied to the session.

If there are no tags mapped, the regular session fee will be applied to the session.

Child Info

First Name
#1 | Bret

Session Summary

Bret C

[Edit](#)

Session	Date	Time	Fee	Multi-Session	Sibling	Amount Due
Session 1	04/15/2019 - 07/31/2019	7:00 AM - 3:00 PM	\$10.00	-	-	\$10.00
Session 2	04/15/2019 - 07/31/2019	7:00 AM - 3:00 PM	\$10.00	-	-	\$10.00

Session Fees \$20.00
One Time Registration Fee \$30.00
Total Fees \$50.00

Notes To Director

Approve Registration

Delete