



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

Add/Edit Program

| | | | |
|---|---------------------------|------------------------|---------------------|
| 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? <input checked="" type="radio"/> Yes <input type="radio"/> No | | | |
| Updated Registration Fee | \$0.00 | | |

Registration fee will not be applied for the child when Yes is selected.

Back **Save**

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.

Card Connect

Manage Tuition Auto Pay (TAP) Account

DISENROLL TAP

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

Disenroll

Please contact the School Director for TAP Disenrollment

OK

Access Path: Administrative Functions → Manage Centers → Configuration

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

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

| Center Director Information | |
|-----------------------------|---|
| * First Name Karthik | * Last Name Oncare Cloud USer |
| Title | * Email PP_PROD_CC@beyonduniverse.in |
| Phone | Fax |

| 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 NSF | Standard Amount \$1.00 |
| G/L Account 9999 | G/L Account Description Acct To Be Determined (sys generated) |
| Instructions to the Parents who wants to Disenroll from TAP | Please contact the School Director for TAP Disenrollment |
| Save | |

3 Summer Camp Enhancements

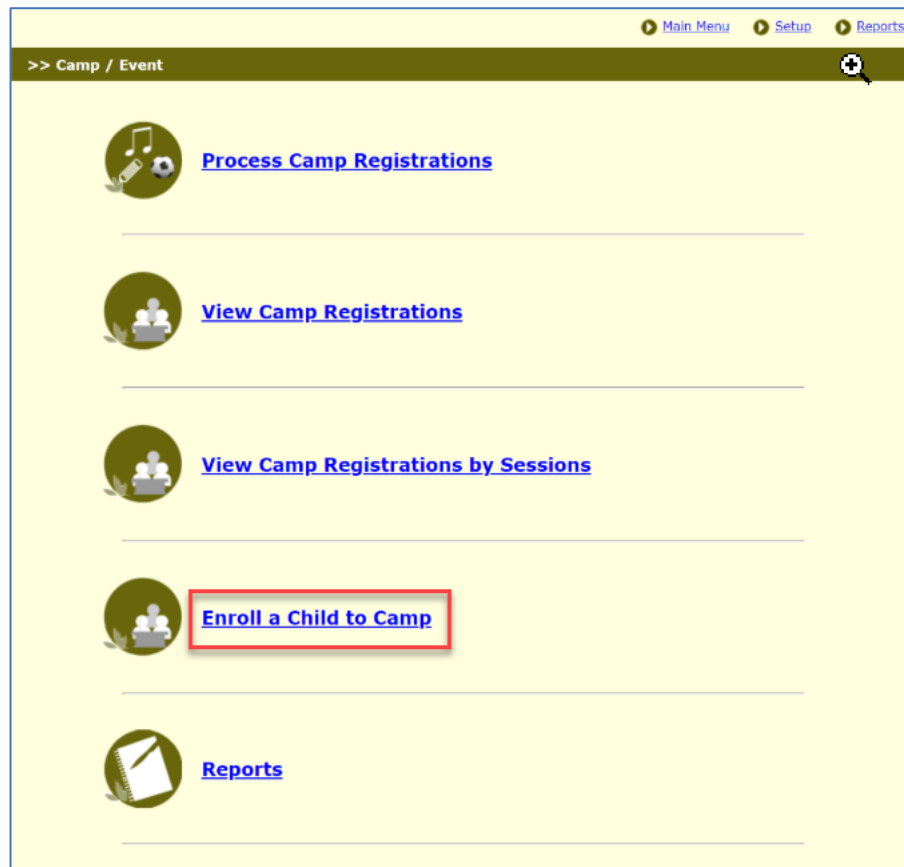
OnCare has enhanced the Summer Camp with the following features:

- 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@beyonduniverse.in Confirm Email raiza_11@beyonduniverse.in

Mobile Phone (467)-676-8798

Address 5 Second Lane

State California

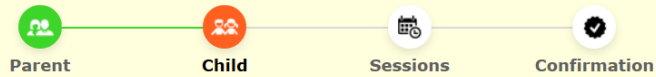
How many children you want to enroll?

Select 1

Back Next

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

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



Child Details

First Name Last Name

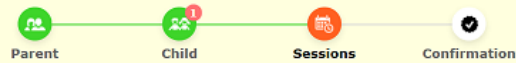
Gender ☒ Boy ☐ Girl Date of Birth

Grade entering for the next School Year

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Child Details can be entered here

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



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 |

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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

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

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

Session Summary

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

Submit

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

Add New Child

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.

Done

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

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 | | | | | | | | | | |
| Sponsor : Raiza Warne | | | | | | | | | | |
| Child First Name : Tom | | | | | | | | | | |
| Show Ledger All <input checked="" type="checkbox"/> 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 | |
| (Page 1 of 1) 1 | | | | | | | | | | |
| 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

[Back](#)

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

[Back](#)

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

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 | kuiper1234@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

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 | <div>Select</div> <div>Session</div> <div>Edit</div> |

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:

- Create the tags at Company Level
- Assign the required tags at the Camps and Sessions
- 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

Cancel

Save

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

[Back](#)
[Camp Settings](#)

Program Setup

Program Name

Summer Camp 2019 (Grade 2-3)

Program Coordinator

Sonelly

Email

sonelly@beyonduniverse.in

Phone

(654) 454-3423

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

\$30.00

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
04/15/2019

Session End Date
07/31/2019

Session Time
From 7:00 AM To 3:00 PM

Session Grade
From 1st Grade To 4th Grade

Maximum Slots
25

Status
Active

Fees Setup

Billing Description
Session 1

Payment Due Date
05/31/2019

Regular Session Fees
\$100.00

Select the Tags and Setup Special Fees

| Select | Tag Name | Fees |
|-------------------------------------|-----------|---------|
| <input checked="" type="checkbox"/> | Camp Tag | \$10.00 |
| <input type="checkbox"/> | Child Tag | \$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 BEN
Prev
Next

Parent Information
Child Information

Child Selection:
Add New Child

| 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 |

Save

Child Information

First Name
Bret

Last Name
C

Date of Birth
01/01/2018

Enrollment Start Date
MM/DD/YYYY

Primary Classroom
Class A

Age Group
Two Years

School
Not Assigned

Student ID

Child ID Code
9277

Ethnicity
Select here...


Secondary Classroom
Not Assigned

Grade
1st Grade

Child #
223226

Status
Active

Select the tags applicable for this child.


Browse

Tags
Camp Tag x

>> Family Registrations Management

[Back](#)

Parent Info

Primary Contact

First Name
Ben

Mobile Phone
(633) 567-8999

Child Info

First Name

#1 Bret

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.

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