



Online Tuition Payment (OTP)

Tuition Auto Pay (**TAP**) & Tuition Pay Direct (**TPD**)

User Guide

Last update August 6, 2018

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1. What is Online Tuition Payment (OTP)

OnCare offers two online tuition payment options to the parents. You have chosen to offer both options.

- **Tuition Auto Pay (TAP)** - Parents enroll once and give authorization to the center to draft your account. This is the total hassle free option.
- **Tuition Pay Direct (TPD)** - Parents retain the control to setup recurring payment and make one-time payment as needed.

2. Access to Online Tuition Payment

When the Online Tuition Payment is enabled for your center, you will notice a new icon and function in the Family Accounting main menu as shown below:

The screenshot displays the 'Main Menu' of the OnCare Family Accounting system. On the left, there is a vertical list of menu items: 'Family Records', 'Child Records', 'Family Account Ledger', and 'Online Tuition Payment'. Each item is accompanied by a circular icon. The 'Online Tuition Payment' item is highlighted with a yellow box, and an arrow points to it from a text box that says 'Online payment function enabled'. To the right of the menu, there is a table titled 'Currently Checked In' with columns for 'Classroom', 'Children', and 'Staff'. The table lists several classrooms and their corresponding counts.

Currently Checked In		
Classroom	Children	Staff
Room 1	0	0
Room 2 - 3 years	0	0
Room 2 - 4 years	0	0
Room 3 - 3 years	0	0
Room 3 - 4 years	0	0
Room 4 - 3 years	0	0
Room 4 - 4 years	0	0
Room 4 - 5 years	0	0
Room 4 - 6 years	0	0
Room 4 - 7 years	0	0
Room 4 - 8 years	0	0
Room 4 - 9 years	0	0
Room 4 - 10 years	0	0
Room 4 - 11 years	0	0
Room 4 - 12 years	0	0
Room 4 - 13 years	0	0
Room 4 - 14 years	0	0
Room 4 - 15 years	0	0
Room 4 - 16 years	0	0
Room 4 - 17 years	0	0
Room 4 - 18 years	0	0
Room 4 - 19 years	0	0
Room 4 - 20 years	0	0
Room 4 - 21 years	0	0
Room 4 - 22 years	0	0
Room 4 - 23 years	0	0
Room 4 - 24 years	0	0
Room 4 - 25 years	0	0
Room 4 - 26 years	0	0
Room 4 - 27 years	0	0
Room 4 - 28 years	0	0
Room 4 - 29 years	0	0
Room 4 - 30 years	0	0
Room 4 - 31 years	0	0
Room 4 - 32 years	0	0
Room 4 - 33 years	0	0
Room 4 - 34 years	0	0
Room 4 - 35 years	0	0
Room 4 - 36 years	0	0
Room 4 - 37 years	0	0
Room 4 - 38 years	0	0
Room 4 - 39 years	0	0
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Room 4 - 41 years	0	0
Room 4 - 42 years	0	0
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Room 4 - 89 years	0	0
Room 4 - 90 years	0	0
Room 4 - 91 years	0	0
Room 4 - 92 years	0	0
Room 4 - 93 years	0	0
Room 4 - 94 years	0	0
Room 4 - 95 years	0	0
Room 4 - 96 years	0	0
Room 4 - 97 years	0	0
Room 4 - 98 years	0	0
Room 4 - 99 years	0	0
Room 4 - 100 years	0	0


Within the Online Tuition Payment main page, you will see two sections. The left panel contains various "**processing**" links while the right panel contains "**enrollment**" links.

3. Online Tuition Payment (OTP) Enrollment

The first step in enrolling the parents in OTP is to send out **Online Tuition Payment Enrollment** invitation email to parents. Parents enroll in OTP on their own via the Parent Portal. This self service approach means no extra work for you and less liability as you do not have to handle parent's bank account and credit card information.

To start, click here to invite families to enroll


>> Online Tuition Payment



Tuition Auto Pay (TAP)

TAP allows the Director to have total control over the tuition payment online.


- [Process TAP Payment based on Ledger Balance](#)
- [Process TAP Payment For Family](#)
- [Review Status of Submitted TAP Payment](#)



Tuition Pay Direct (TPD)

TPD provides the parents the option to pay their tuition online. Director can review payment status and remind parents to pay on time.

- [Review TPD Payment Status](#)




Card Swipe Payment (CSP)

CSP provides the Director the option to take payments from parents via a card reader.

To activate this option, contact newservice@oncarecloud.com

- [Process Card Swipe Payment](#)
- [Review CSP Payment Status](#)



Online Payment Enrollment

Total Active Families85

Total Active Payors85

Total Active Payors Enrolled in TAP42

Total Active Payors Enrolled in TPD31

Total Active Payors Not Enrolled12

[Online Tuition Payment Enrollment](#)

>> Online Payment Enrollment

[<< Back](#)

You can send an email to parents to invite them to enroll in online payment via the Parent Portal. Parents can enroll either in the Tuition Auto Pay (TAP) or the Tuition Pay Direct (TPD) program. TAP is center controlled while TPD is parents controlled.

[Send Online Payment Enrollment Invitation Email To Parents](#)

TAP Enrollment by authorization form? [Click here](#)

Select this

4. Send Enrollment Invitation Email to Parents

When you click on the option to send enrollment invitation email to parents, you will notice that the system organizes the statuses of the parents in 3 categories:

- Invitation Not Sent
- Invitation Sent But Not Yet Registered
- Registered But Not Enrolled in Online Payment

>> Manage Online Tuition Payments

[Manage Online Payments](#) -> Send Online Payment

3 tabs organize the families by their registration/enrollment status

Family Status: Active

Invitation Not Sent | Invitation Sent But Not Yet Registered | Registered But Not Enrolled in Online Payment

No.	Sel. <input type="checkbox"/>	Family Acct Key	First Name	Last Name	Parent Type	Child(ren)	Email
1	<input checked="" type="checkbox"/>	CHOYI	Vimal	Choyi	Co-Sponsor	Sana	Email not available
2	<input type="checkbox"/>	HE2	Xiaowei (sister)	He	Co-Sponsor	Zhiwei Dennis	katararabbit@gmail.com
3	<input type="checkbox"/>	WITTMER	Eric	Wittmer	Sponsor	Ashlyn, Colton	melizabeth_@hotmail.com
4	<input type="checkbox"/>	WITTMER	Tiffany	Wittmer	Co-Sponsor	Ashlyn, Colton	tiffanywittmer@comcast.net

[Continue](#)

Invitation Not Sent		Invitation Sent But Not Yet Registered			Registered But Not Enrolled in Online Payment			
No.	Sel. ■	Family Acct Key	First Name	Last Name	Parent Type	Child(ren)	Email	Last Sent
1	<input type="checkbox"/>	DAVIS	Oliver	Davis	Co-Sponsor	Preston, Morgan	oliver.davis.13@gmail.com	11/04/2016
2	<input type="checkbox"/>	GARRISON	Joanna	Garrison	Sponsor	Adam	joannagarr@gmail.com	11/10/2016
3	<input type="checkbox"/>	GATES	Stephanie	Avery	Sponsor	Avery	savery7@gmail.com	11/04/2016
4	<input type="checkbox"/>	JOHNSON2	Adam	Johnson	Co-Sponsor	Sophia	ajohnson@cmymers.com	06/07/2017

The status is designed to help the Director to resend invitation email to parents. You can resend as many times as appropriate.

Following is an example of an email sent to parents inviting them to enroll in OTP:

>> Manage Online Tuition Payments

<< Back

From

The Learning Garden West

Subject

Online Tuition Payment Enrollment Invitation

Message

Normal

Arial

(Font Size)

B

I

U

S

≡

This is a reminder that our center offers online tuition payment program. The program removes the hassles of writing checks to pay for tuition. Also, you never have to worry about paying for late charges. We encourage all our parents to take advantage of the online tuition payment program so we can spend less time in administration and spend more time with your children.

There are two online tuition payment options:

- 1) **Tuition Auto Pay (TAP)** - Parents enroll once and give authorization to the center to draft your account. This is the total hassle free option.
- 2) **Tuition Pay Direct (TPD)** - Parents retain the control to setup recurring payment and make one-time payment as needed.

You can enroll in the online tuition payment program via the OnCare Parent Portal. Once you have login to the Parent Portal, you will be able to choose between the TAP or the TPD option.

If you have any question about registering or logging into the Parent Portal or the enrollment process, please let me know.

Regards,
oncare_cs_1421
716.308.1224

☐ Restore original reminder message text

Note: The system will automatically insert a link for Parent Portal Registration / Login at the bottom of the email

Send

Clear

Page 5

Online Tuition Payment Enrollment Invitation

Dear Test,

This is a reminder that our center offers online tuition payment program. The program removes the hassles of writing checks to pay for tuition. Also, you never have to worry about paying for late charges. We encourage all our parents to take advantage of the online tuition payment program so we can spend less time in administration and spend more time with your children.

There are two online tuition payment options:

- 1) **Tuition Auto Pay (TAP)** - Parents enroll once and give authorization to the center to draft your account. This is the total hassle free option.
- 2) **Tuition Pay Direct (TPD)** - Parents retain the control to setup recurring payment and make one-time payment as needed.

You can enroll in the online tuition payment program via the OnCare Parent Portal. Once you have login to the Parent Portal, you will be able to choose between the TAP or the TPD option.

If you have any question about registering or

Typically, a new parent will click on the register online link embedded in the email

let me know.

Regards,
oncare_cs_1421
716-308-4334

The Learning Garden West.

Click here to register online: <https://www.oncareoffice.com/ParentRegistration.aspx?IKEY=09cf4430-59ab-407b-b912-d09b51c17092>

Click here to Login online: <https://www.oncareoffice.com/parentportal/parentlogin.aspx?ID=11E92C6E-FA5B-4DD0-B946-CED87887642E>

OnCare

Parent Portal Registration

User Email
z09parent8@oncareservices.com

Password

Re-enter Password

Password Strength Meter
Secure

SUBMIT

System defaults parent email as username. Parent only needs to come up with a password to create a secured OnCare Parent Portal account.

5. Automatic OTP Email Invitation

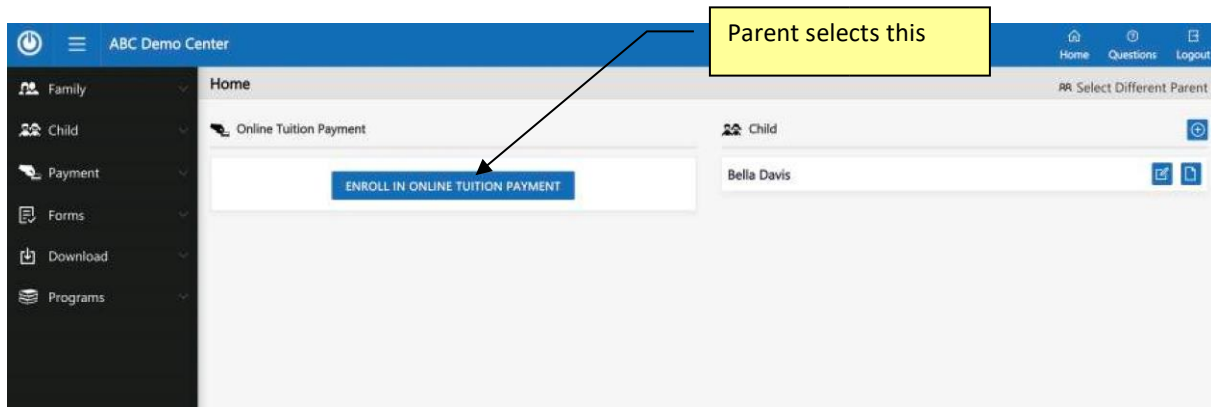
During the initial online tuition payment implementation launch, the steps above show you how to send out the OTP enrollment invitation emails to all of your existing families in batch.

After that initial launch, whenever you **add a new family** or **edit the family record of an existing family** who has not enrolled in online payment yet, the system will show the following pop-up to make it easier to invite those families to enroll in OTP.



6. Online Tuition Payment Enrollment via Parent Portal

When a parent login to the Parent Portal, they will clearly see the option to enroll in Online Tuition Payment.



For client that offers both the TAP and TPD option, when the parents click on Enroll in Online Tuition Payment, they will be presented with the two options:

ABC Demo Center

Home Questions Logout

Family Child Payment Forms Download Programs

Online Tuition Payment

Following are the two online tuition payment options available:

Tuition Auto Pay (TAP)

Hassle Free

- For busy parents who prefer the hassle free tuition payment option.
- Just enroll once and forget about it.
- Center will draft the tuition from parent's account automatically. Totally hassle free.

Go

Tuition Pay Direct (TPD)

Convenient

- For parents who prefer the convenience of paying tuition online instead of writing a check.
- Parents can setup recurring payments or go online to make a one-time payment.

Go

Let's say parent chooses TPD

7. Tuition Pay Direct (TPD) Enrollment

Following are the steps the parents will complete in enrolling in TPD:

Create TPD Funding Account

Select Payment Type

☒ Checking/Savings Account
 ☐ Credit/Debit Card

Name of Funding Account

Wells Fargo

< BACK NEXT

Create TPD Funding Account

Bank Account Type

☒ Checking Account
 ☐ Savings Account

Account Holder Name

Jonny Smith

Routing Number

121000358

Account Number

Re-Enter Account Number

123456789

< BACK SUBMIT

Terms and Conditions for Tuition Pay Direct (TPD) Enrollment

TUITION PAY DIRECT (TPD) Enrollment

To complete your enrollment into the Tuition Pay Direct (TPD) program, please agree to the terms below:

I hereby authorize the one-time or scheduled recurring TPD payment to the childcare provider, based on my settings. I also understand that it is my responsibility to make the payments before the due date.

Furthermore, I understand that this authorization will remain in effect until I cancel it online. I agree that I am responsible for keeping the funding account up to date. I understand that I can update the funding account information or cancel my TPD enrollment by logging in to the OnCare Parent Portal.

In the case of an ACH Transaction being rejected for Non Sufficient Funds (NSF), I understand that my child care provider may attempt to process the charge again within 30 days, and at its discretion, bill an additional \$25 charge for each attempt returned NSF which will be initiated as a separate transaction from the authorized recurring payment. I agree not to dispute this recurring billing with my bank so long as the transactions correspond to the terms I agree to here.

I understand that the payment processing is handled by a 3rd party payment processor. My information will be shared with the payment processor strictly for the purpose of processing the tuition payment only.

☒ I have read and accept the terms and conditions of Tuition Pay Direct (TPD).

ENROLL ME IN TUITION PAY DIRECT

CANCEL

8. TPD One-Time Payment

Once a parent enrolled in TPD, he has the option to make one-time payment as needed. On the Parent Portal home page, the TPD parents will see a **"Pay Now"** option next to the Ledger Current Balance.

Home

PR Select Different Parent

Tuition Payment

Current Balance

\$ 450.00

Next Schedule payment Date

N/A

Pay Now

Date	Description	Status	Amount
No data to display			

Bella Davis

One-time payment

TPD - One Time Payment

You have selected to make an one-time payment

Name of Funding Account
Wells Fargo

Current Account Ledger Balance
\$ 450.00

Amount to Pay
\$ 450

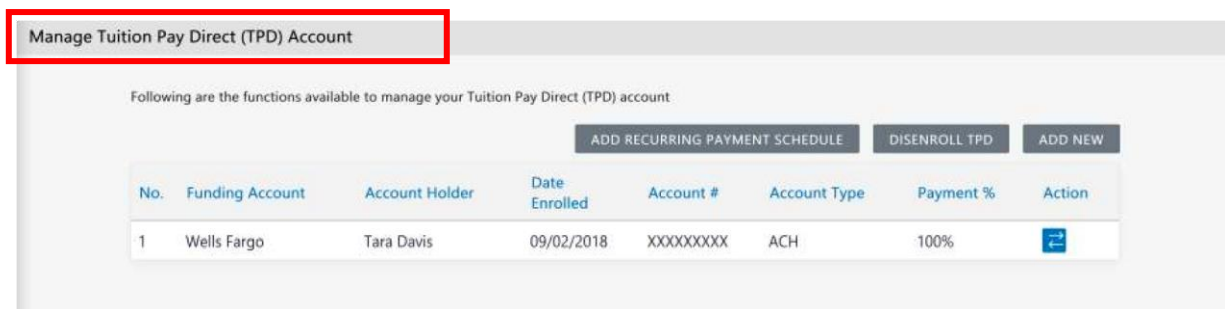
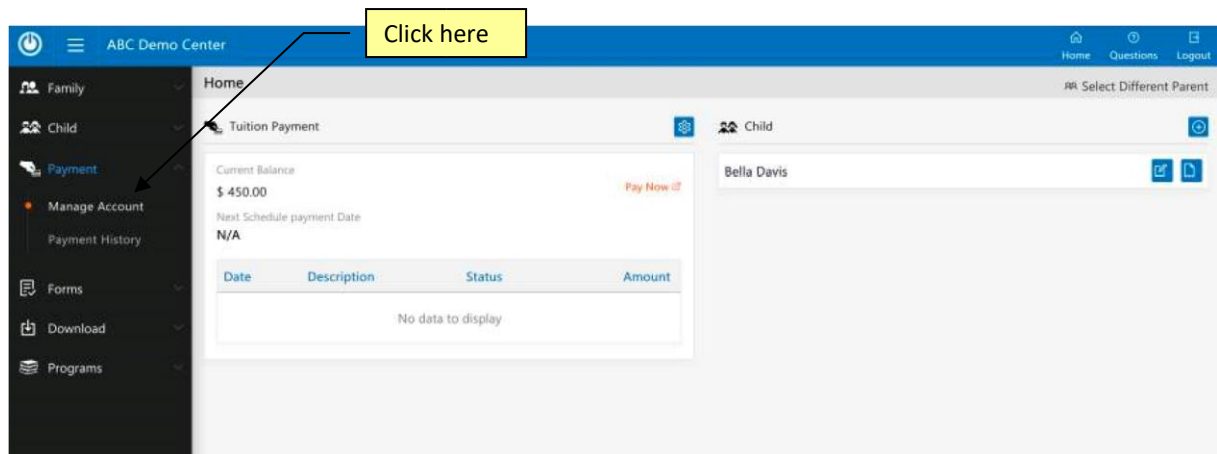
☒ I authorize my child care provider to charge my funding account for the child care services provided for the amount indicated above. The authorization is valid for one time use only. I certify that I am an authorized user of the funding account and that I will not dispute the payment with my credit card company or bank; so long as the transaction corresponds to the terms indicated here.

Payor can choose to pay the default ledger balance or pay a different amount

9. Manage Tuition Pay Direct (TPD)

TPD parents can select Manage Tuition Pay Direct (TPD) to:

- Add Recurring Payment Schedule
- Add New Funding Account
- Replace or Edit Existing Funding Account
- Disenroll from TPD



Important Tip: TPD is parent controlled, therefore there is nothing that you (the Director) need to do each week/month. The system will process the online tuition payment based on the parents' one-time payment or recurring payment schedule. The tuition payment will be automatically deposited into the center bank account.

10. Tuition Auto Pay (TAP) Processing

TAP is Director controlled; therefore you (the Director) need to do the following steps to process the tuition payment after each billing period.

>> Online Tuition Payment

Tuition Auto Pay (TAP)

TAP allows the Director to have total control over the tuition payment online.

- [Process TAP Payment based on Ledger Balance](#)
- [Process TAP Payment For Family](#)
- [Review Status of Submitted TAP Payment](#)

Tuition Pay Direct (TPD)

TPD provides the parents the option to pay their tuition online. Director can review payment status and remind parents to pay on time.

- [Review TPD Payment Status](#)

Card Swipe Payment (CSP)

CSP provides the Director the option to take payments from parents via a card reader.

To activate this option, contact newservice@oncarecloud.com

- [Process Card Swipe Payment](#)
- [Review CSP Payment Status](#)

Online Tuition Payment Enrollment

Total Active Families	85
Total Active Payors	85
Total Active Payors Enrolled in TAP	42
Total Active Payors Enrolled in TPD	31
Total Active Payors Not Enrolled	12

Online Tuition Payment Enrollment

Note: You can process TAP payment as many times as you would like throughout the month. TAP will show you a list of TAP enrolled families with a ledger balances. As long as the TAP family has a ledger balance, you can draft their account.

>> Process TAP Payment

TAP Home -> Review and Edit TAP Amount to Process

Following is a listing of TAP families with a ledger balance as of today (01/01/2018). The TAP amount to process is defaulted to the family account ledger balance. You can keep or edit the amount.

Instructions

- To take a quick **view** of the ledger balance details without changing the ledger, click on the "**View**" hyperlink.
- To **edit** the TAP amount which is equivalent to the ledger balance, click on the "**Edit**" hyperlink.
- Once you are ready to submit the batch for processing, click on the "**Next**" button at the bottom of the page.

No.	Family Acct Key	Payor	Child Names	Ledger Balance	Funding Account	Account Type	% of Payment	TAP Amt to Process	Action
1	<input checked="" type="checkbox"/> ARORA	Neha Gupta	Yuvaan	\$ 995.00	Yuvaan Arora	Card	100%	\$ 995.00	View Edit
2	<input checked="" type="checkbox"/> BELL	Catie Bell	Wyatt	\$ 965.00	Catherine Bell credit card	Card	100%	\$ 965.00	View Edit
3	<input checked="" type="checkbox"/> BHATE	Dhruv Bhat	Reyansh	\$ 965.00	DB Amazon Visa 4/18	Card	100%	\$ 965.00	View Edit
4	<input type="checkbox"/> BOWEN	Erin Bowen	Charlotte	\$ 965.00	Joint Checking	ACH	100%	\$ 965.00	View Edit
5	<input type="checkbox"/> BRIGHT	Jason Bright	Lucia, Milana	\$ 1,449.00	SWA	Card	100%	\$ 1,449.00	View Edit
6	<input type="checkbox"/> BURGER	Melissa Burger	Malcolm	\$ 965.00	SW Visa	Card	100%	\$ 965.00	View Edit
7	<input type="checkbox"/> BURKE	Christy Burke	Parker	\$ 505.00	CCB New Chase Personal	Card	100%	\$ 505.00	View Edit
44	<input type="checkbox"/> YOUNG	Krista Young	Katalyna	\$ 995.00	Chase	Card	100%	\$ 995.00	View Edit
45	<input type="checkbox"/> ZEBELMAN	Stefanie Zebelman	Samantha, Henry	\$ 1,040.00	Chase Checking	ACH	100%	\$ 1,040.00	View Edit
Total				\$48,914.50				\$48,914.50	

[Back](#) [Next](#)

Select the family you would like to draft.
Note: The header check box will select all

Review the ledger balance and select "Next"

Typically you would process all the TAP families with a ledger balance. However you can skip a family if you would like.

The system automatically proposes the ledger balance as the TAP payment amount by default. You can change the "TAP Amt to Process" if needed.

>> Process TAP Payment

TAP Home -> Submit TAP Payments for Processing

Please confirm the 'Amounts to Process' are correct. Click the 'Submit' button when you are ready to submit this batch of TAP payments for processing by close of business today.

No.	Family Acct Key	Payor	Child Names	Ledger Balance	Funding Account	Account Type	% of Payment	TAP Amt to Process	Comments
1	ARORA	Neha Gupta	Yuvaan	\$ 995.00	Yuvaan Arora	Card	100%	\$995.00	
2	BELL	Catie Bell	Wyatt	\$ 965.00	Catherine Bell credit card	Card	100%	\$965.00	
3	BHATE	Dhruv Bhat	Reyansh	\$ 965.00	DB Amazon Visa 4/18	Card	100%	\$965.00	
Total				\$2,925.00				\$2,925.00	

[Back](#) [Submit](#) [Cancel](#)

Once you are ready, click Submit

11. Automatic Posting of TAP/TPD Payment to the Ledger

After the OTP payments have been submitted for processing, the payment transactions are automatically posted to the ledger.

For TAP Families:

Sponsor	11/04/2014		TAP ACH Payment	B06100005210 - Processed			\$ 415.00	\$ 0.00	Void
Sponsor	12/01/2014		4 Day schedule	Asis Atwal	Asis	\$ 415.00		\$ 415.00	Void
Sponsor	12/01/2014		TAP ACH Payment	B06600006071 - Processed			\$ 415.00	\$ 0.00	Void
Sponsor	01/01/2015		4 Day schedule	Asis Atwal	Asis	\$ 415.00		\$ 415.00	Void
Sponsor	01/02/2015		TAP ACH Payment	B07200007014 - Processed			\$ 415.00	\$ 0.00	Void
Sponsor	02/01/2015		4 Day schedule	Asis Atwal	Asis	\$ 415.00		\$ 415.00	Void
Sponsor	02/02/2015		TAP ACH Payment	B07800008255 - Processed			\$ 415.00	\$ 0.00	Void
Sponsor	03/01/2015		4 Day schedule	Asis Atwal	Asis	\$ 415.00		\$ 415.00	Void
Sponsor	03/02/2015		TAP ACH Payment	B08100009267 - Processed			\$ 415.00	\$ 0.00	Void
Sponsor	04/01/2015		4 Day schedule	Asis Atwal	Asis	\$ 415.00		\$ 415.00	Void
Sponsor	04/01/2015		TAP ACH Payment	B08600010548 - Processed			\$ 415.00	\$ 0.00	Void
								Today's Bal.	\$ 0.00

Automatic posting to ledger.

For TPD Families

Ledger	Posting Date	Check #	Description	Comments	Child Name	Charges	Credit	Balance	Action
Sponsor	05/18/2015		Full Time 4 Days/Week Preschool	Layla Talaga	Layla	\$ 168.00		\$ 168.00	Void
Sponsor	05/18/2015		TPD ACH Payment	R05000001334			\$ 168.00	\$ 0.00	Void
Sponsor	05/25/2015		Full Time 4 Days/Week Preschool	Layla Talaga	Layla	\$ 168.00		\$ 168.00	Void
Sponsor	05/25/2015		TPD ACH Payment	R05600001525			\$ 168.00	\$ 0.00	Void
Sponsor	06/01/2015		Full Time 4 Days/Week Preschool	Layla Talaga	Layla	\$ 168.00		\$ 168.00	Void
Sponsor	06/01/2015		TPD ACH Payment	R07300001908			\$ 168.00	\$ 0.00	Void
Sponsor	06/08/2015		Full Time 4 Days/Week Preschool	Layla Talaga	Layla	\$ 168.00		\$ 168.00	Void
Sponsor	06/08/2015		TPD ACH Payment	R10000002348			\$ 168.00	\$ 0.00	Void
Sponsor	06/15/2015		Full Time 4 Days/Week Preschool	Layla Talaga	Layla	\$ 168.00		\$ 168.00	Void
Sponsor	06/15/2015		TPD ACH Payment	R13700002757			\$ 168.00	\$ 0.00	Void

12. Review Status of Submitted TAP Payment

You can review the status of the submitted TAP payments within OnCare for reconciliation purposes as follows:

>> Online Tuition Payment

Tuition Auto Pay (TAP)

TAP allows the Director to have total control over the tuition payment online.

- Process TAP Payment based on Ledger Balance**
- Process TAP Payment For Family**
- Review Status of Submitted TAP Payment**
- Automatic TAP Processing Setup**

Online Payment Enrollment

Total Active Families **140**

Total Active Payors **146**

Total Active Payors Enrolled in TAP **68**

Total Active Payors Enrolled in TPD **64**

Total Active Payors Not Enrolled **14**

Page 14

>> View Submitted TAP Payment

[TAP Home](#) -> Review Status of Submitted TAP Payment

Select Dates: Custom Date From 12/01/2017 To 12/31/2017 Submit

Payment Summary 12/01/2017 to 12/31/2017 View ALL

Transactions					Amount				
S.No	Batch	Pending	Processed	Failed	Total	Pending	Processed	Failed	Total
1	12/01/2017 - ACH	0	16	0	16	\$ 0.00	\$ 16,363.50	\$ 0.00	\$ 16,363.50
2	12/01/2017 - Card	0	53	2	55	\$ 0.00	\$ 54,598.00	\$ 1,462.50	\$ 56,060.50
3	12/04/2017 - ACH	0	1	0	1	\$ 0.00	\$ 965.00	\$ 0.00	\$ 965.00
Total		0	70	2	72	\$ 0.00	\$ 71,926.50	\$ 1,462.50	\$ 73,389.00

Click on the batch date/type will drill down to the list of detail transactions that made up that batch

Batch Transaction Details

Batch: 12/01/2017 - CARD Transaction Status: All

No.	Family Acct Key	Payer	Child Name	TAP Amount	Reference ID	Status	Message
1	ALVAREZ	Chris Alvarez	Cash Alvarez	\$ 455.00	B08300149682	Processed	
2	ALVAREZ	Heather Hendon	Cash Alvarez	\$ 455.00	B08300149683	Processed	
3	ANDERSON	Ashley Harrington	Liam Anderson	\$ 965.00	B08300149684	Processed	
4	ARORA	Neha Gupta	Yuvaan Arora	\$ 995.00	B08300149685	Processed	
5	BELL	Catie Bell	Wyatt Bell	\$ 965.00	B08300149686	Processed	
6	BERTMARING	Ian Bertmaring	Henri Bertmaring	\$ 1,040.00	B08300149687	Processed	
7	BESENHOFFER	Darah Hudson	Ariel Besenhofer	\$ 910.00	B08300149688	Processed	
8	BHATE	Dhruv Bhate	Reyansh Bhate	\$ 965.00	B08300149689	Processed	
9	BLEVINS	Libby Blevins	Violet Blevins	\$ 1,040.00	B08300149690	Processed	
10	BRIGHT	Jason Bright	Lucia Bright, Milana Bright	\$ 1,449.00	B08300149691	Processed	
11	BUCCI	Christopher Bucci	Brady Bucci	\$ 995.00	B08300149692	Processed	
12	BURGER	Melissa Burger	Malcolm Burger	\$ 965.00	B08300149693	Processed	
13	BURKE	Christy Burke	Parker Burke	\$ 505.00	B08300149694	Processed	

13. Director TAP Functions

>> View Submitted TAP Payment

[TAP Home](#) -> Review Status of Submitted TAP Payment

Select Dates: Custom Date From 12/01/2017 To 12/31/2017 Submit

Payment Summary 12/01/2017 to 12/31/2017 View ALL

Transactions					Amount				
S.No	Batch	Pending	Processed	Failed	Total	Pending	Processed	Failed	Total
1	12/01/2017 - ACH	0	16	0	16	\$ 0.00	\$ 16,363.50	\$ 0.00	\$ 16,363.50
2	12/01/2017 - Card	0	53	2	55	\$ 0.00	\$ 54,598.00	\$ 1,462.50	\$ 56,060.50
3	12/04/2017 - ACH	0	1	0	1	\$ 0.00	\$ 965.00	\$ 0.00	\$ 965.00
Total		0	70	2	72	\$ 0.00	\$ 71,926.50	\$ 1,462.50	\$ 73,389.00

Select this

Clicking on the **Total Active Payors Enrolled in TAP** link will give you a list of the TAP families. The Director has the following functions:

- To disenroll a family from TAP
- Help replace the parent funding account

- Help edit the parent credit card information (e.g. card expiration date)

>> Manage TAP Families

[Manage TAP Payments](#) -> Manage TAP Families

Following are the actions you can perform on an active TAP family:

- 1) Disenroll - Allows you to disenroll a family from TAP as parents are not able to disenroll themselves via the Parent Portal.
- 2) Replace Acct - Allows you to help a parent to replace their existing (credit card or ACH) with a new funding account.
- 3) Edit Card Info - Allows you to help a parent to edit their existing credit card information on file. Edit is not available for ACH.

Note: To sort, click on the underlined column header

View Active

No.	<u>Family Acct Key</u>	<u>Parent Name</u>	<u>Child Name</u>	<u>Pymt Type</u>	<u>Parent Type</u>	<u>Funding Acct Name</u>	<u>Date Enrolled</u>	<u>Action</u>
1	ANDERSON	Ashley Harrington	Liam	Card	Sponsor	Liam's Tuition	08/20/2017	Disenroll Replace Acct Edit Card Info
2	ARORA	Neha Gupta	Yuvaan	Card	Sponsor	Yuvaan Arora	05/31/2017	Disenroll Replace Acct Edit Card Info
3	BELL	Catie Bell	Wyatt	Card	Sponsor	Catherine Bell credit card	11/22/2016	Disenroll Replace Acct Edit Card Info
4	BERTMARING	Ian Bertmaring	Henri	Card	Co-Sponsor	BOA	08/01/2017	Disenroll Replace Acct Edit Card Info
5	BESENHOFFER	Darah Hudson	Ariel	Card	Sponsor	Daniel's Discover	09/20/2017	Disenroll Replace Acct Edit Card Info
6	BHATE	Dhruv Bhat	Reyansh	Card	Co-Sponsor	DB Amazon Visa 4/18	11/05/2016	Disenroll Replace Acct Edit Card Info
7	BLEVINS	Libby Blevins	Violet	Card	Sponsor	Chase Debit	09/08/2017	Disenroll Replace Acct Edit Card Info
8	BOWEN	Erin Bowen	Charlotte	ACH	Sponsor	Joint Checking	11/21/2016	Disenroll Replace Acct
9	BRIGHT	Jason Bright	Lucio, Milana	Card	Co-Sponsor	SWA	11/21/2016	Disenroll Replace Acct Edit Card Info
10	BUCCI	Christopher Bucci	Brady	Card	Co-Sponsor	Amex	09/16/2017	Disenroll Replace Acct Edit Card Info
11	BURGER	Melissa Burger	Malcolm	Card	Sponsor	SW Visa	11/21/2016	Disenroll Replace Acct Edit Card Info
12	BURKE	Christy Burke	Parker	Card	Sponsor	CCB New Chase Personal	05/22/2017	Disenroll Replace Acct Edit Card Info
13	BURKE	Jason Burke	Parker	Card	Co-Sponsor	Southwest Visa	10/16/2017	Disenroll Replace Acct Edit Card Info
14	CHIU	Hui-Chun Tammy Hsu	Maxwell, Noah	ACH	Sponsor	BOA	11/09/2016	Disenroll Replace Acct

TAP functions for Director

14. New Implementation: Director Trial Run

It is important that the Director performs a trial run to walk through the entire parent OTP enrollment process BEFORE inviting all the families to enroll.

The trial run let you can see for the steps the parents need to complete to enroll in OTP. This helps with answering parent's questions after launch.

Trial Run Steps:

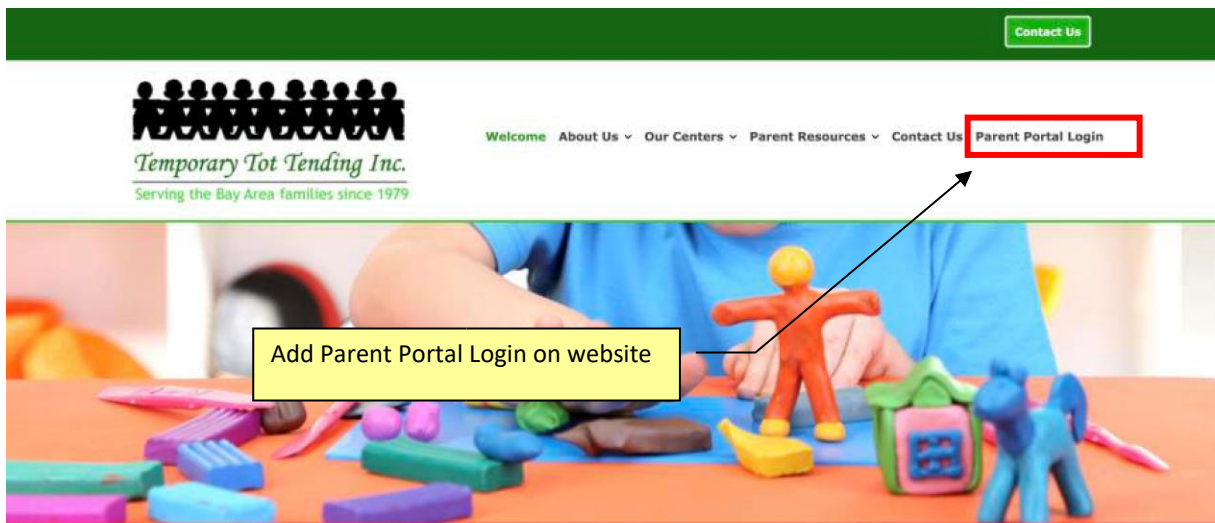
- 1) Add a new test family record in OnCare.
Important Note: Must use a different from the work email already used as admin login to OnCare
- 2) Post a manual transaction item to this Test Parent ledger (e.g. \$5) so there is a balance to pay
- 3) Send an invitation to this test parent email
- 4) Register a parent portal account
- 5) Enroll in Tuition Pay Direct and make one-time payment of \$5 ledger balance
- 6) Wait 2 business days to see the \$5 being deposited to the business bank account

15. Add Parent Portal Login URL to Website

Each OnCare client has its own unique Parent Portal URL.

It is highly recommended that you incorporate the unique OnCare Parent Portal Login URL on your company website to make it easier for your parents login to the Parent Portal.

Following is an example of how a client added the **Parent Portal Login** link on their website:

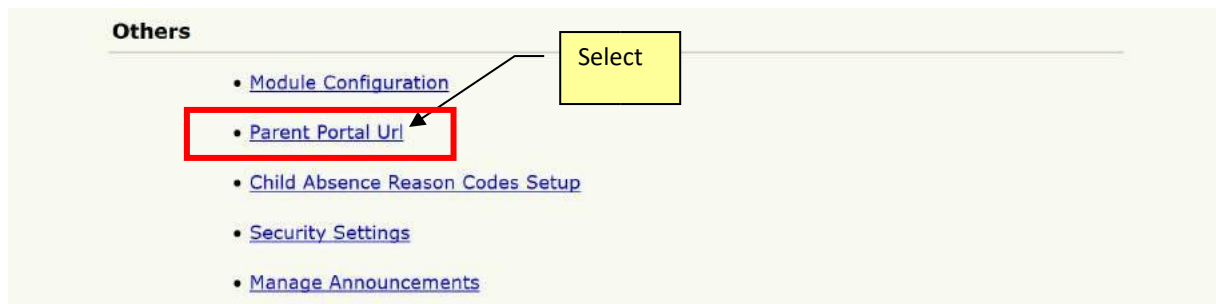


How to obtain your custom Parent Portal URL?

You can follow the steps below to get the custom Parent Portal URL.

Administrative Functions --> Other --> Parent Portl Url

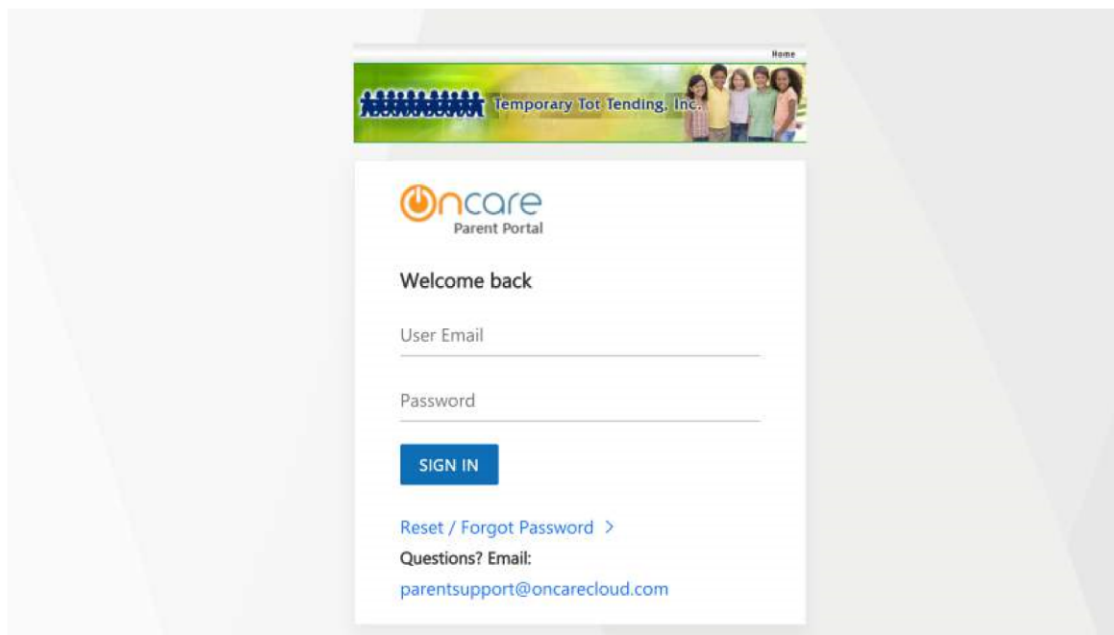




The Parent Portal URL is unique for each client. You can send the URL to your webmaster



The custom Parent Portal URL will display the client company banner at the top in the OnCare Parent Portal login page:



Note: The OnCare Parent Portal is fully mobile enabled which means if the parents login using their mobile devices, the Parent Portal page will automatically adjust for mobile display as shown below:

