OnCare

Tuition Pay Direct (TPD)

User Guide

Last update August 10, 2018
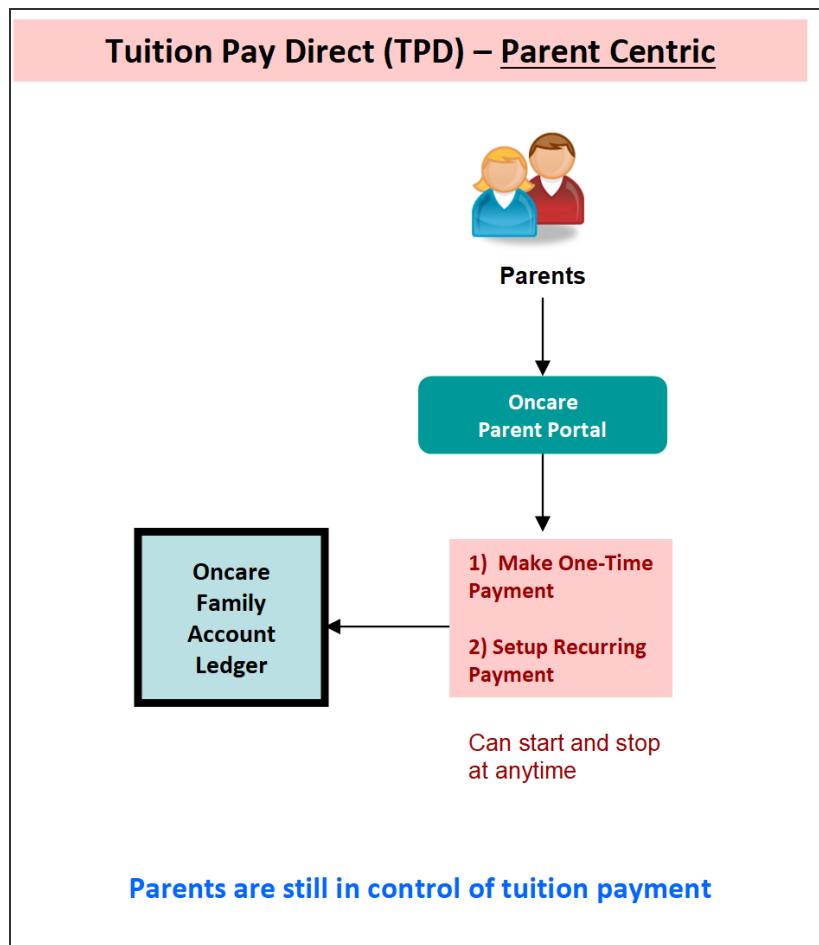

Contents

1. What is Tuition Payment Direct (TPD)

Tuition Pay Direct (TPD) is an online tuition payment solution offered by OnCare. TPD is parent-centric, meaning the parents retain the control to setup recurring payments and/or a one-time payment as needed.

Tuition Pay Direct (TPD) – Parent Centric

Parents

Oncare Parent Portal

Oncare Family Account Ledger

1) Make One-Time Payment

2) Setup Recurring Payment

Can start and stop at anytime

Parents are still in control of tuition payment

2. Access to Tuition Pay Direct

When the Tuition Pay Direct (TPD) module is enabled for your center, you will notice a new icon and function in the Family Accounting main menu as shown below:

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

3. Tuition Pay Direct (TPD) Enrollment

The first step in enrolling the parents in Tuition Pay Direct is to send out **Tuition Pay Direct (TPD) Invitation Email** to parents. Parents enroll in TPD 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.

>> **TPD Enrollment**

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You can send an email to parents to invite them to enroll in the Tuition Pay Direct (TPD) program via the Parent Portal. Once the parents login to the Parent Portal, they can enroll in the Tuition Pay Direct (TPD) program by entering their funding account information and agreeing to the terms and conditions of the TPD program online.

Send Tuition Pay Direct (TPD) Invitation Email To Parents

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 TPD Payments**

Manage TPD Payments -> Send Tuition Pay Direct

3 tabs organize the families by their registration/enrollment status

Family Status: Active

| **Invitation Not Sent** | **Invitation Sent But Not Yet Registered** | **Registered in Parent Portal But Not Enrolled in TPD** |

No.	Sel. ■	Family Acct Key	First Name	Last Name	Parent Type	Child(ren)	Email
1	☐	RECHNER	Celeste	Rechner	Sponsor	Wes	celeste.rechner@gmail.com
2	☐	RECHNER	Chris	Rechner	Co-Sponsor	Wes	chrisjrechner@gmail.com

Continue

No.	Sel. ☐	Family Acct Key	First Name	Last Name	Parent Type	Child(ren)	Email	Last Sent
1	☐	DAVIS	Oliver	Davis	Co-Sponsor	Preston, Morgan	oliver.davis.13@gmail.com	11/04/2016
2	☐	GARRISON	Joanna	Garrison	Sponsor	Adam	joannagarr@gmail.com	11/10/2016
3	☐	GATES	Stephanie	Avery	Sponsor	Avery	savery7@gmail.com	11/04/2016
4	☐	JOHNSON2	Adam	Johnson	Co-Sponsor	Sophia	ajohnson@cmyers.com	06/07/2017

Tabs: **Invitation Not Sent** | **Invitation Sent But Not Yet Registered** | **Registered But Not Enrolled in Online Payment**

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 TPD:

>> Manage TPD Payments

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From LDDB - Fifth Ave

Subject Tuition Pay Direct (TPD) Only Enrollment Invitation

Message

This is a reminder that our center offers **Tuition Pay Direct (TPD)**, an 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 Tuition Pay Direct (TPD) so we can spend less time in administration and spend more time with your children.

You can enroll in Tuition Pay Direct (TPD) via the OnCare Parent Portal. If you have any question about registering or logging into the OnCare Parent Portal or the enrollment process, please let me know.

Regards,
Oncare_CS_1331
614-884-4213
LDDB - Fifth Ave.

☐ **Show last modified message**

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

Jackson Child Care Academy (Holman Child Care)   01/09/2018

Tuition Pay Direct (TPD) Only Enrollment Invitation

Dear Test,

This is a reminder that our center offers **Tuition Pay Direct (TPD)**, an 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 Tuition Pay Direct (TPD) so we can spend less time in administration and spend more time with your children.

You can enroll in Tuition Pay Direct (TPD) via the OnCare Parent Portal. If you have any question about registering or logging into the OnCare Parent Portal or the enrollment process, please let me know.

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

Regards,
Oncare_CS_1078
732-833-4677
Jackson Child Care Academy (Holman Child Care).
Click here to register online: https://www.oncareoffice.com/ParentRegisteration.aspx?IKEY=6dd2e13b-4bcd-42d0-a357-d1c0898903e0
Click here to Login online: https://www.oncareoffice.com/parentportal/parentlogin.aspx?ID=68638C19-5B8B-415F-8999-485B98A1DE22

⏻ OnCare

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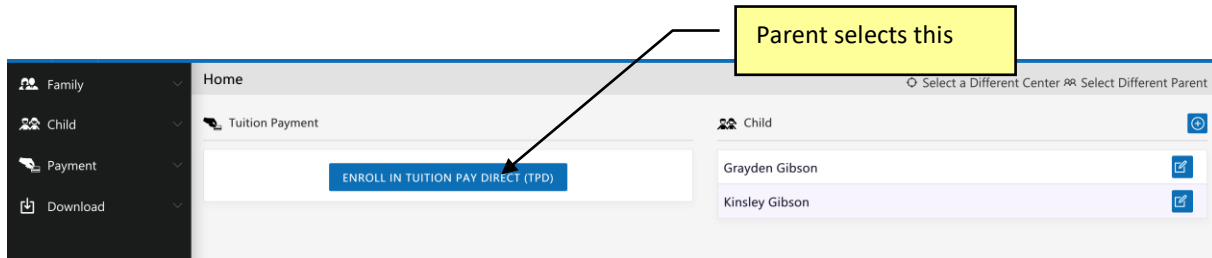
> System defaults parent email as username. Parent only needs to come up with a password to create a secured OnCare Parent Portal

User Email
angel908@oncareservices.com

Password   Re-enter Password
••••••••   ••••••••

Password Strength Meter
Secure

SUBMIT

5. Tuition Pay Direct Enrollment via Parent Portal

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

Parent selects this

6. Tuition Pay Direct (TPD) Enrollment

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

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

7. 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 Balance.

8. Manage Tuition Pay Direct (TPD) Account

TPD parents can select Manage Account to:
- Add Recurring Payment Schedule
- Add New Funding Account
- Replace or Edit Existing Funding Account
- Disenroll from TPD

Note: OnCare allows parents to use multiple funding accounts to pay their tuition. If parents select to use multiple funding accounts, they need to specify the percentage for each funding account to add to 100%.

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.

9. Automatic Posting of TPD Payment to the Ledger

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

Ledger	Posting Date	Check #	Description	Comments						nce	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

10. Review Status of Submitted TPD Payment

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

>> Tuition Pay Direct (TPD)

Tuition Pay Direct (TPD)

TPD provides the parents the option to pay their tu[...]
Director can review payment status and re[...]nd pa[...]
time.

Select this

1. **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

1. **Process Card Swipe Payment**

2. **Review CSP Payment Status**

TPD Enrollment

Total Active Families	106
Total Active Payors	106
Total Active Payors Enrolled in TPD	103
Total Active Payors Not Enrolled	3

TPD Enrollment

>> Review TPD Payment Status

TPD Home -> Review TPD Payment Status

Select Dates [Last Week] From 01/01/2018 To 01/07/2018 [Submit]

Payment Summary 01/01/2018 to 01/07/2018   View [ALL]

		Transactions				Amount			
S.No	Batch	Pending	Processed	Failed	Total	Pending	Processed	Failed	Total
1	01/01/2018 - ACH	0	41	0	41	$ 0.00	$ 64,309.30	$ 0.00	$ 64,309.30
2	01/01/2018 - Card	0	10	0	10	$ 0.00	$ 16,102.74	$ 0.00	$ 16,102.74
3	01/02/2018 - ACH	0	3	0	3	$ 0.00	$ 4,708.50	$ 0.00	$ 4,708.50
4	01/02/2018 - Card	0	2	0	2	$ 0.00	$ 2,536.74	$ 0.00	$ 2,536.74
5	01/03/2018 - ACH	0	2						,876.60
6	01/03/2018 - Card	0	1						714.00
7	01/04/2018 - ACH	0	2						,128.50
8	01/04/2018 - Card	0	2						,878.26
	Total	**0**	**63**	**2**	**65**	**$ 0.00**	**$ 99,241.56**	**$ 3,013.08**	**$ 102,254.64**

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

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Batch Transaction Details

Batch: 01/01/2018 - ACH   Transaction Status : [All]

No.	Family Acct Key	Payer	Child Name	Amount	Reference ID	Status	Message
1	FARMER	Alan Farmer	Charlie Farmer	$ 1,477.00	O00079082	Processed	
2	GUSE	Kevin Guse	Ellie Guse,Evie Guse	$ 660.00	O00079126	Processed	
3	JEPSON	Jennifer Jepson	Amelia Domopoulos,Mason Domopoulos	$ 1,832.30	R44700079292	Processed	
4	WEST	Blake West	Michael West	$ 1,354.00	R44700079293	Processed	
5	SOURS	Kristen Sours	Samantha Sours,Syliva Sours	$ 2,577.50	R44700079294	Processed	
6	ROGERS	Courtney Rogers	Jack Rogers	$ 930.00	R44700079295	Processed	
7	CARAVAJAL	Chris Caravajal	Ethan Caravajal,Austin Caravajal	$ 2,739.70	R44700079296	Processed	
8	WELCH	dan welch	Dexter Welch,Sydney Welch,Samantha Welch	$ 3,591.10	R44700079297	Processed	
			Hadley				

11.   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 TPD. This helps with answering parent's questions after launch.
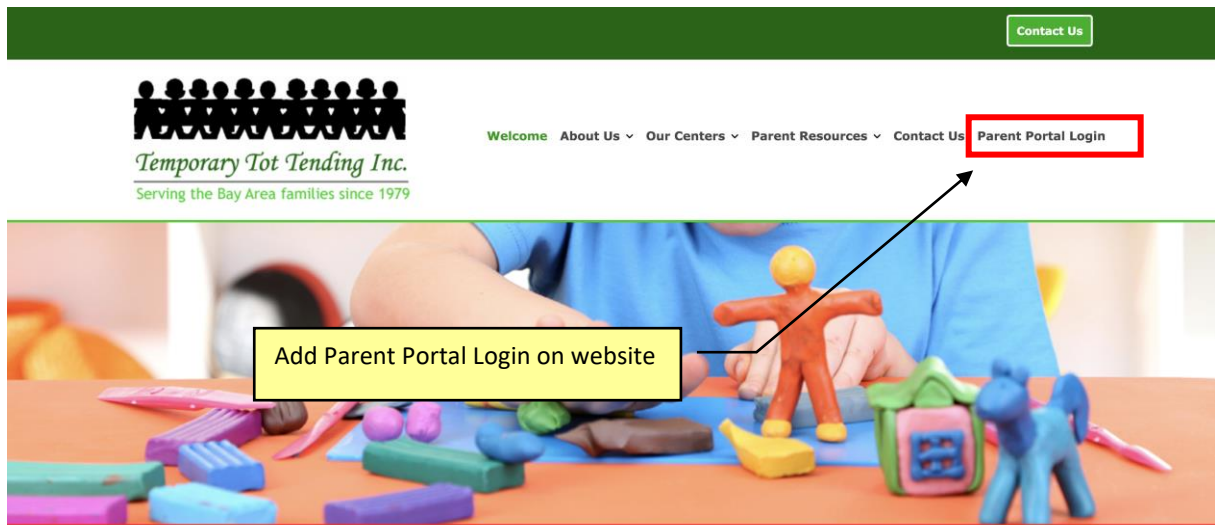
Trial Run Steps:

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

12.   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.
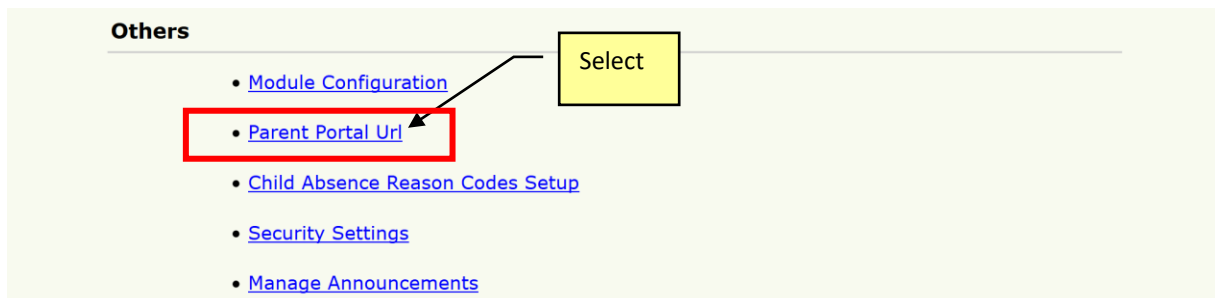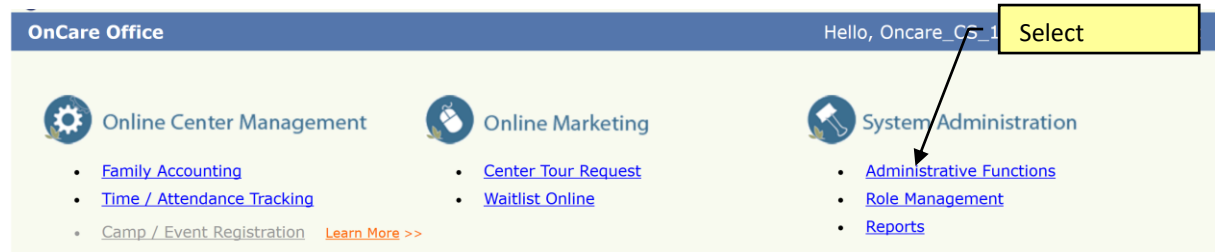
Following is an example of how a client added the **Parent Portal Login** link on their website:

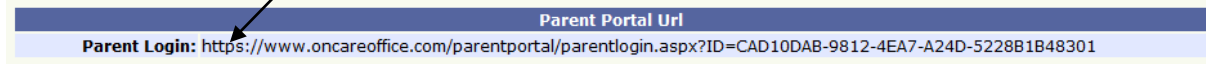Add Parent Portal Login on website

How to obtain your custom Parent Portal URL?

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

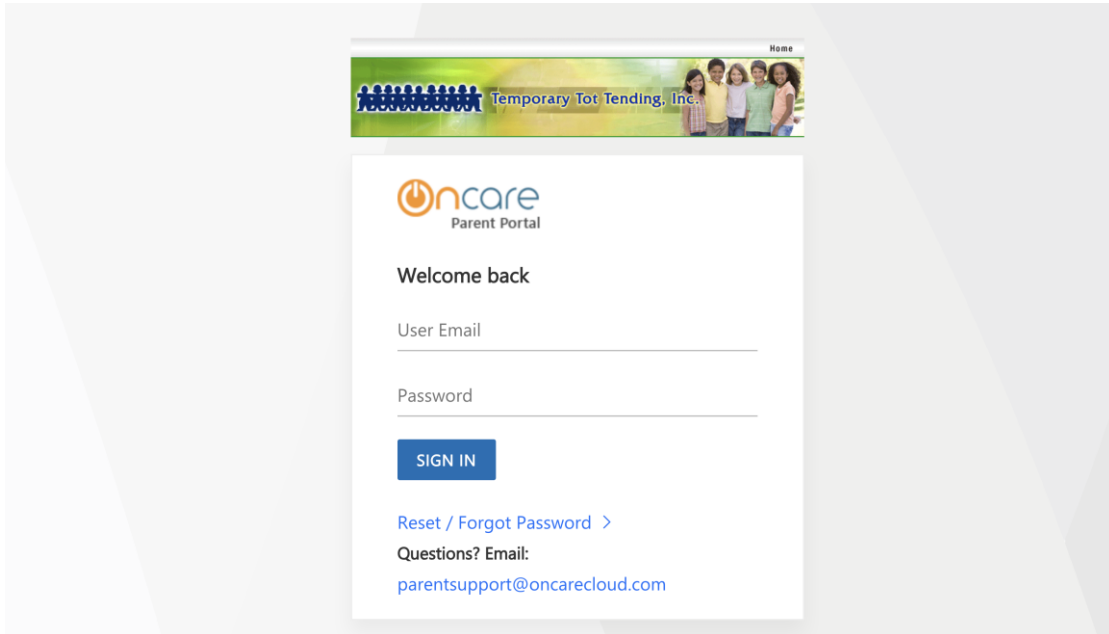Administrative Functions --> Other --> Parent Portl Url

Select

Select

Parent Portal Url

Parent Login: https://www.oncareoffice.com/parentportal/parentlogin.aspx?ID=CAD10DAB-9812-4EA7-A24D-5228B1B48301

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: