



Tuition Auto Pay (TAP)

User Guide

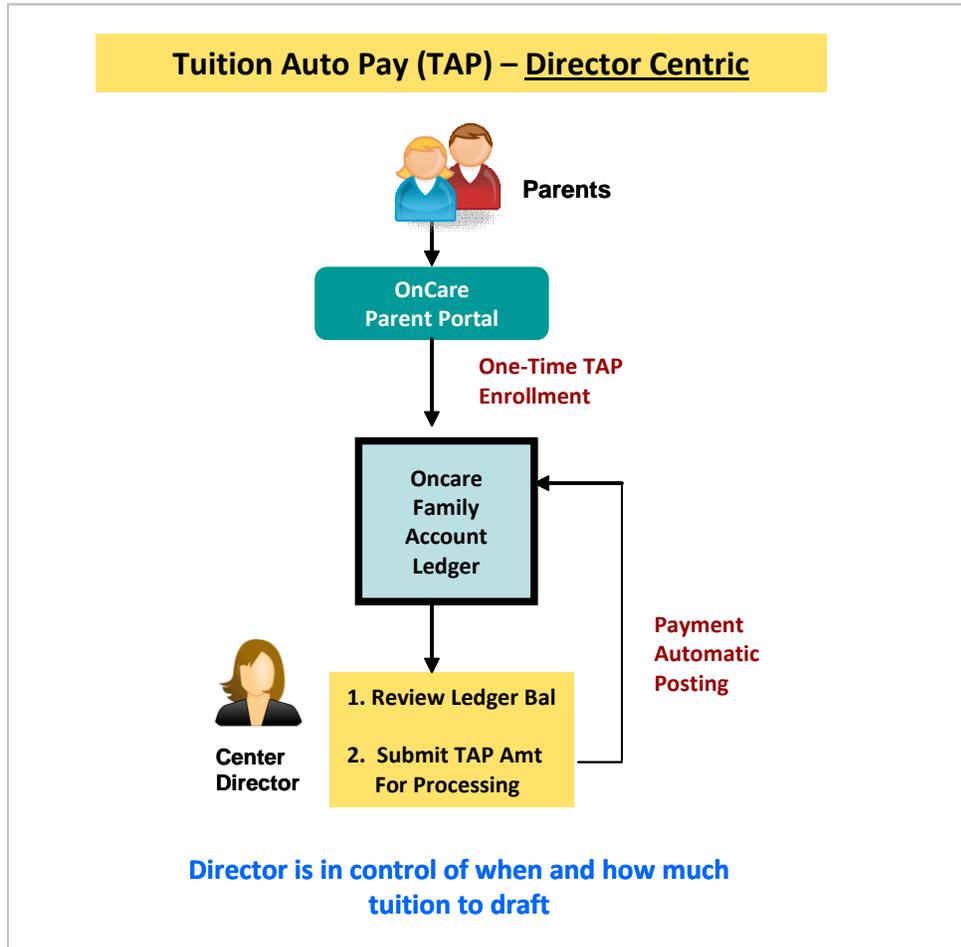
Last update August 15, 2018

Contents

1.	What is Tuition Auto Pay (TAP)	2
2.	Access to Tuition Auto Pay (TAP)	3
3.	Tuition Auto Pay (TAP) Enrollment	4
4.	Send Enrollment Invitation Email to Parents	5
5.	Automatic TAP Email Invitation	8
6.	Tuition Auto Pay Enrollment via Parent Portal	8
7.	Tuition Auto Pay (TAP) Processing	10
8.	Automatic Posting of TAP Payment to the Ledger	12
9.	Review Status of Submitted TAP Payment	12
10.	Director TAP Functions.....	14
11.	New Implementation: Director Trial Run.....	15
12.	Add Parent Portal Login URL to Website	15

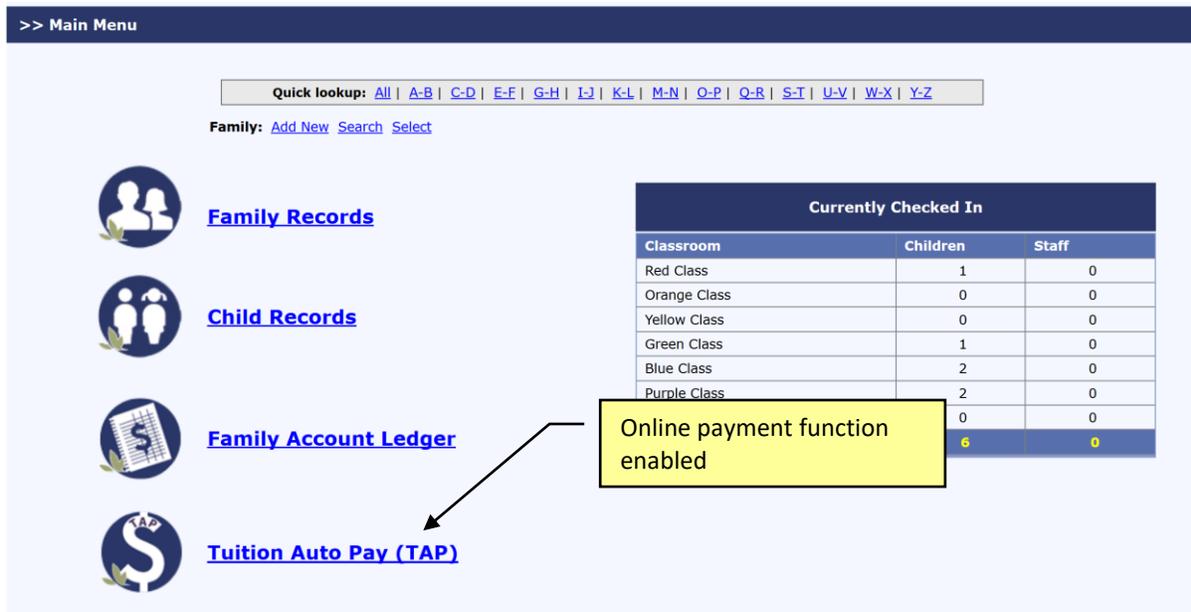
1. What is Tuition Auto Pay (TAP)

Tuition Auto Pay (TAP) is an online tuition payment solution offers by OnCare. TAP is director/center centric, meaning the parents enroll in TAP once which gives the director authorization to draft their bank or credit card account for tuition payment each billing period.



2. Access to Tuition Auto Pay (TAP)

When the Tuition Auto Pay (TAP) 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' interface. On the left, there is a vertical list of menu items, each with an icon and a text label: 'Family Records' (family icon), 'Child Records' (child icon), 'Family Account Ledger' (ledger icon), and 'Tuition Auto Pay (TAP)' (TAP icon). The 'Tuition Auto Pay (TAP)' option is highlighted with a yellow callout box containing the text 'Online payment function enabled'. An arrow points from this box to the 'Tuition Auto Pay (TAP)' menu item. At the top right, there is a 'Quick lookup' search bar with a list of letters (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). Below the search bar, there are links for 'Family: Add New Search Select'. On the right side of the menu, there is a table titled 'Currently Checked In' with columns for 'Classroom', 'Children', and 'Staff'.

Currently Checked In		
Classroom	Children	Staff
Red Class	1	0
Orange Class	0	0
Yellow Class	0	0
Green Class	1	0
Blue Class	2	0
Purple Class	2	0
	0	0
	6	0

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

>> Tuition Auto Pay (TAP)

Tuition Auto Pay (TAP)

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

1. [Process TAP Payment based on Ledger Balance](#)
2. [Process TAP Payment For Family](#)
3. [Review Status of Submitted TAP Payment](#)

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](#)

TAP Enrollment

Total Active Families	149
Total Active Payors	149
Total Active Payors Enrolled in TAP	136
Total Active Payors Not Enrolled	13

[TAP Enrollment](#)

To start, click here to invite families to enroll

3. Tuition Auto Pay (TAP) Enrollment

The first step in enrolling the parents in TAP is to send out **TAP Enrollment** invitation email to parents. Parents enroll in TAP 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.

Main Menu Setup Reports Functions

>> TAP Enrollment

[Back](#)

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

[Send Tuition Auto Pay \(TAP\) Enrollment 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 TAP

Note:

- **Registration** => refers to whether the parents have registered for a OnCare Parent Portal account
- **Enrollment** => refers to whether the parents have enrolled in Tuition Auto Pay (TAP)

>> Manage TAP Payments

[Manage TAP Payments](#) -> Send Tuition Auto Pay (TAP) Enrollment Invitation Email

Family Status: Active

Invitation Not Sent **Invitation Sent But Not Yet Registered** Registered in Parent Portal But Not Enrolled in TAP

No.	Sel. <input type="checkbox"/>	Family Acct Key	First Name	Last Name	Parent Type	Child(ren)	Email	Last Sent
1	<input type="checkbox"/>	BAUS	Andrew	Baus	Co-Sponsor	Jocelyn, Avery	abaus1@yahoo.com	12/27/2017
2	<input type="checkbox"/>	BAUS	Nancy	Baus	Sponsor	Jocelyn, Avery	elizabethbaus2@gmail.com	12/08/2017
3	<input type="checkbox"/>	BENNETT	Adam	Bennett	Co-Sponsor	Eljiah	adamjbennett1@gmail.com	12/13/2017
4	<input type="checkbox"/>	BUTLER	Denise	Butler	Sponsor	Levi, Quinn	denisebutler@gmail.com	12/04/2017
5	<input type="checkbox"/>	BUTLER	Joshua	Butler	Co-Sponsor	Levi, Quinn	joshuaheathbutler@gmail.com	12/04/2017
6	<input type="checkbox"/>	CLEMENTS	Josh	Clements	Co-Sponsor	Rylan	jsc3206@hotmail.com	12/27/2017
7	<input type="checkbox"/>	GONZALEZ	Matt	Gonzalez	Co-Sponsor	Anistyn	mattgonzalez4@icloud.com	12/27/2017

3 tabs organize the families by their registration/enrollment status

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	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 TAP:

>> Manage TAP Payments

[<< Back](#)

From Angel's Care and Learning Center

Subject Tuition Auto Pay (TAP) Only Enrollment Invitation

Message

Normal Arial (Font Size) **B** *I* U ~~S~~

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

You can enroll in Tuition Auto Pay (TAP) 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,

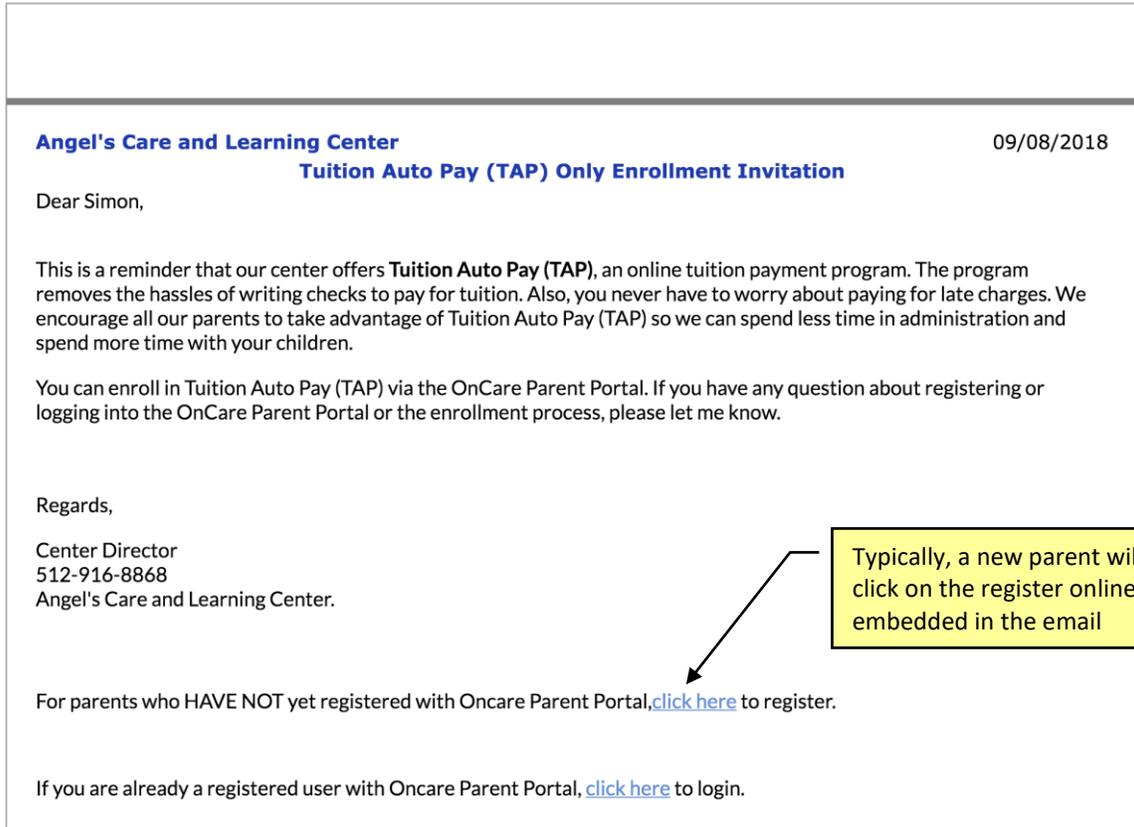
Center Director
512-916-8868
Angel's Care and Learning Center.

Show last modified message

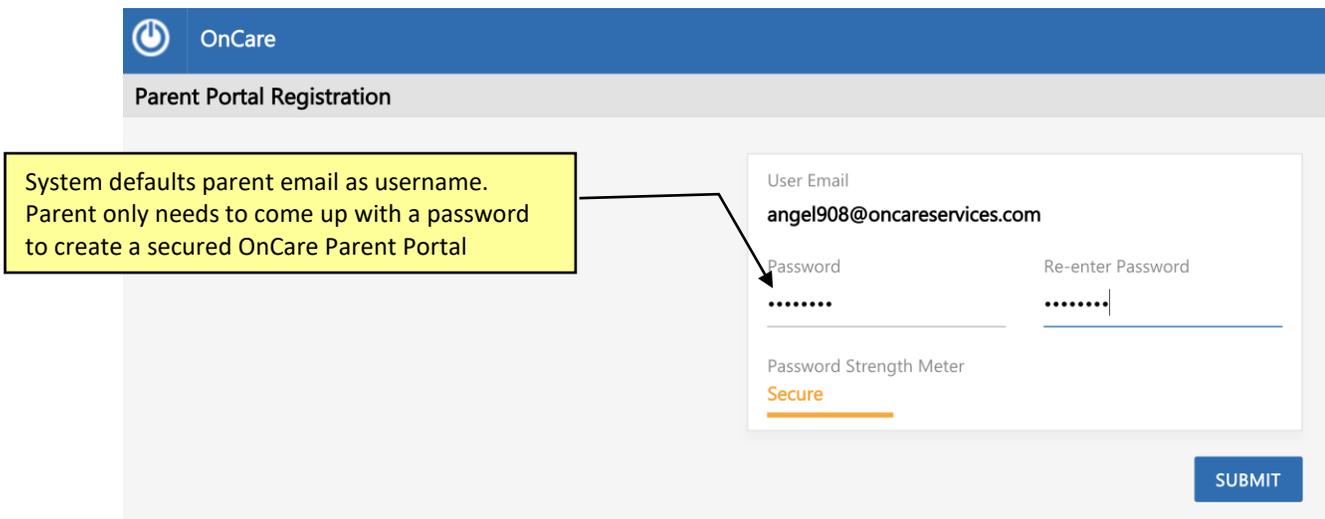
Note: The system will automatically insert a link for Parent Portal Registration / Login at the bottom of the email

Send **Clear**

In the email that the parents receive, there are 2 links added at the bottom. New parents will choose the first link to register with the OnCare Parent Portal.



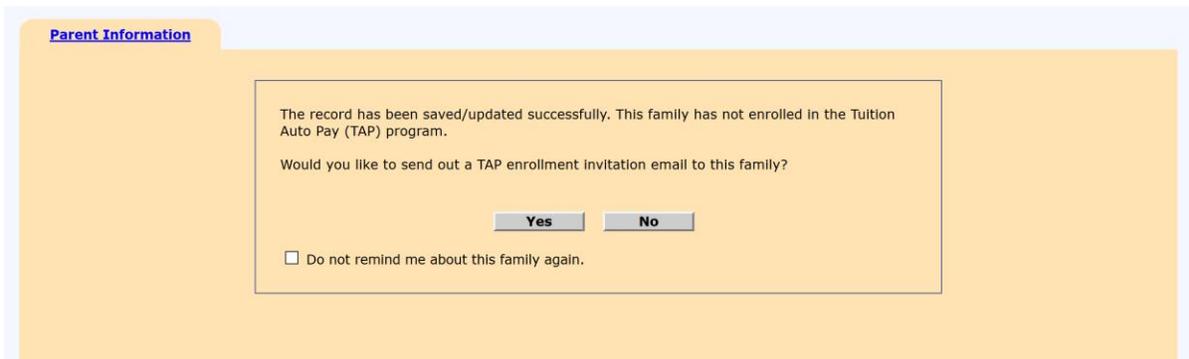
Parents register by creating a password:



5. Automatic TAP Email Invitation

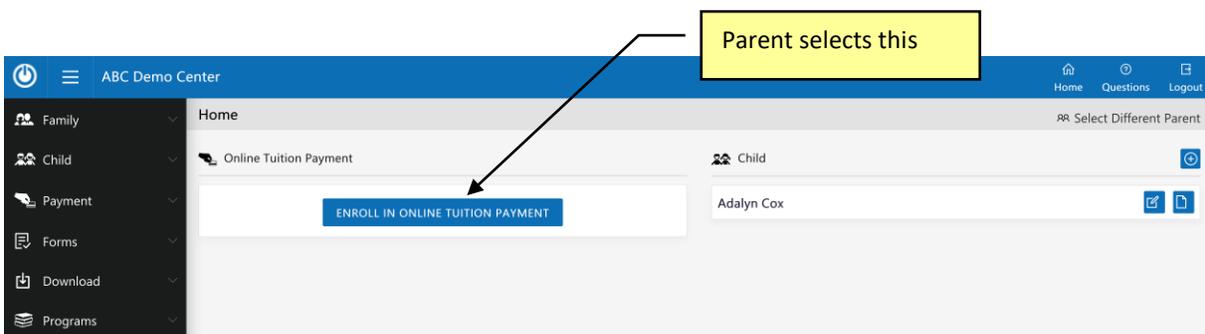
During the initial online tuition payment implementation launch, the steps above show you how to send out the TAP enrollment invitation emails to all of your existing families in batch.

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 TAP.



6. Tuition Auto Pay Enrollment via Parent Portal

When a parent login to the Parent Portal, they will clearly see the option to enroll in Tuition Auto Pay (TAP).



Parents would select the funding account type and enter their funding account information:

ABC Demo Center

Home Questions Logout

Family Child Payment Forms Download Programs

Create TAP Funding Account

Select Payment Type

Checking/Savings Account Credit/Debit Card

Name of Funding Account
Enter a name to identify this funding account (e.g. John Chase Visa)

< BACK NEXT

Create TAP Funding Account

Bank Account Type

Checking Account Savings Account

Account Holder Name
John Smith

Routing Number
121000358

Account Number

Re-Enter Account Number
123456789

< BACK SUBMIT

The diagram shows a check with fields for NAME, ADDRESS, CITY, STATE, ZIP, DATE, and 0123. Below the check, the routing number 121000358 is identified as the Bank Routing Number, the account number 123456789 as the Bank Account Number, and the check number 0123 as the Check Number.

Terms and Conditions for Tuition Auto Pay (TAP) Enrollment

[Privacy Policy](#) | [FAQ](#)

TUITION AUTO PAY (TAP) PROGRAM AUTHORIZATION FOR ACH

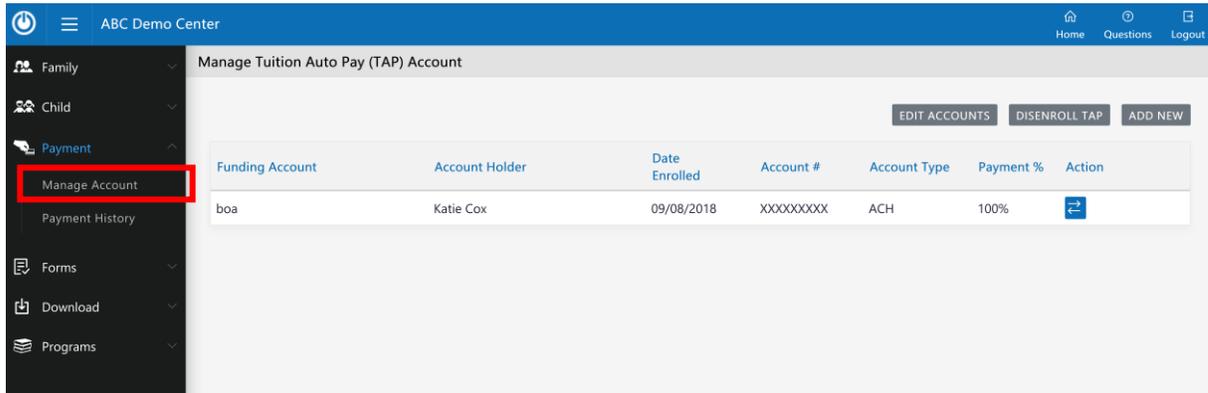
To complete your request for enrollment into the Tuition Auto Pay (TAP) program, please agree to the terms below:

- I authorize regularly scheduled recurring charges by my child care provider to my checking or savings account on each billing period. The charge will appear on my bank statement as an "ACH Debit." I agree that no prior-notification will be provided.
- Furthermore, I understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify my child care provider in writing of this authorization at least 15 days prior to the next billing date. If the above noted periodic payment dates fall on a weekend or holiday, I understand that the payment may be executed on the next business day. I understand that because this is an electronic transaction, these funds may be withdrawn from my account as soon as the above noted periodic transaction dates. I agree that I am responsible for keeping the funding account up to date. I understand that I can update the funding account information 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 acknowledge that the origination of ACH transactions to my account must comply with the provisions of U.S. law. 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 have read and accept the terms and conditions of Tuition Auto Pay (TAP)

ENROLL ME IN TUITION AUTO PAY DELETE CANCEL

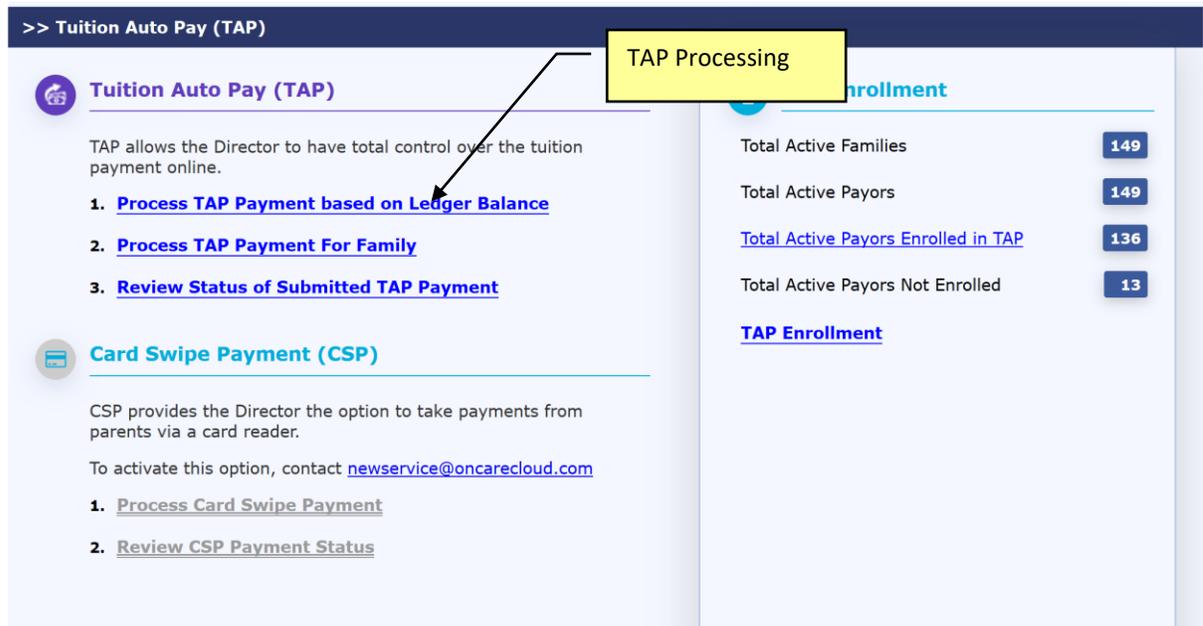
After the parents are enrolled in TAP, when they click on Manage Account on the left panel, they can make changes to their funding accounts.



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%.

7. 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.



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
				Total	\$48,914.50			\$48,914.50	

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	

Once you are ready, click Submit

8. Automatic Posting of TAP Payment to the Ledger

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

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.

9. Review Status of Submitted TAP Payment

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

>> Tuition Auto Pay (TAP)

Tuition Auto Pay (TAP)

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

1. [Process TAP Payment based on Ledger Balance](#)
2. [Process TAP Payment For Family](#)
3. [Review Status of Submitted TAP Payment](#)

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](#)

TAP Enrollment

Total Active Families 149

Total Active Payors 149

[Total Active Payors Enrolled in TAP](#) 136

Total Active Payors Not Enrolled 13

[TAP Enrollment](#)

>> View Submitted TAP Payment

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

Select Dates From To

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

View

S.No	Batch	Transactions				Amount			
		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 :

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	BESENHOFER	Darah Hudson	Ariel Besenhofer	\$ 910.00	B08300149688	Processed	
8	BHATE	Dhruv Bhat	Reyansh Bhat	\$ 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	Christv Burke	Parker Burke	\$ 505.00	B08300149694	Processed	

10. Director TAP Functions

>> Tuition Auto Pay (TAP)

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](#)

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- [Review CSP Payment Status](#)

TAP Enrollment

Total Active Families 149

Total Active Payors 149

[Total Active Payors Enrolled in TAP](#) 136

Total Active Payors Not Enrolled

[TAP Enrollment](#)

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

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 Bertmarling	Henri	Card	Co-Sponsor	BOA	08/01/2017	Disenroll Replace Acct Edit Card Info
5	BESENHOFER	Darah Hudson	Ariel	Card	Sponsor	Daniel's Discover	09/20/2017	Disenroll Replace Acct Edit Card Info
6	BHATE	Dhruv Bhate	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	Lucia, 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

View Active ▼

TAP functions for Director

11. New Implementation: Director Trial Run

It is important that the Director performs a trial run to walk through the entire parent TAP 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 TAP. 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.

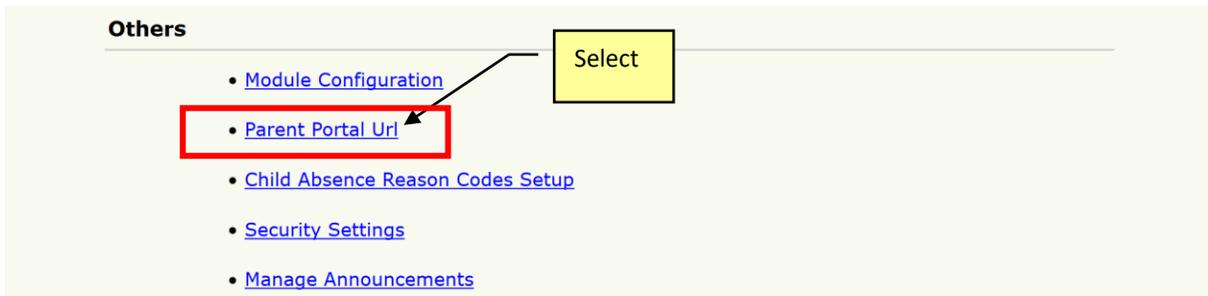
Following is an example of how a client added the **Parent Portal Login** link on their website:



How to obtain your custom Parent Portal URL?

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

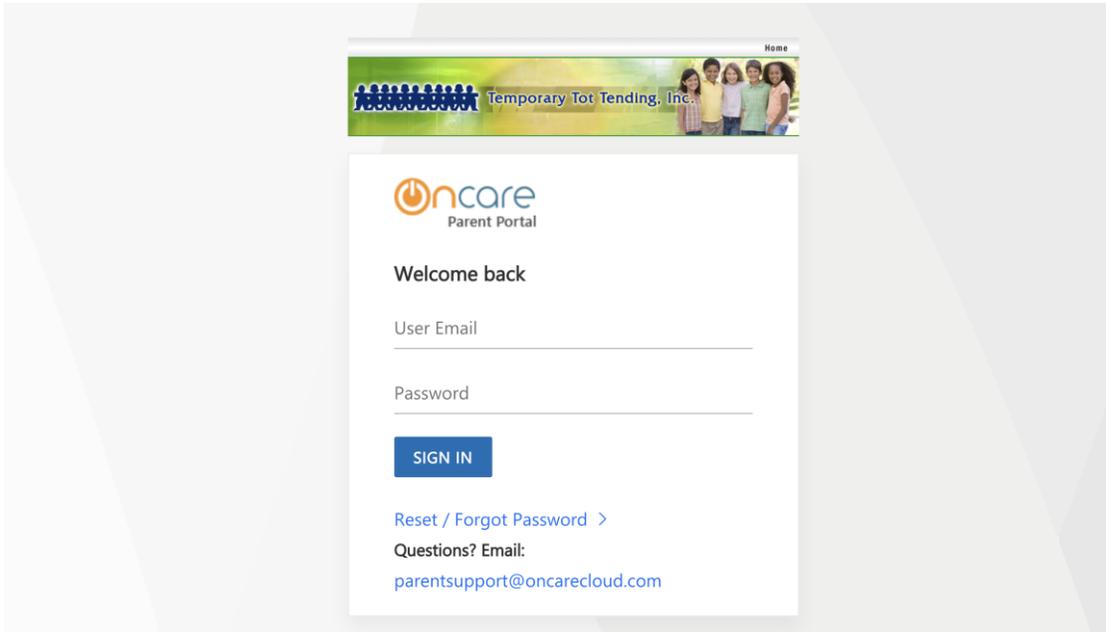
Administrative Functions --> Other --> Parent Portal Url



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

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:

