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# Online Forms

## User Guide

Last update May 5, 2019

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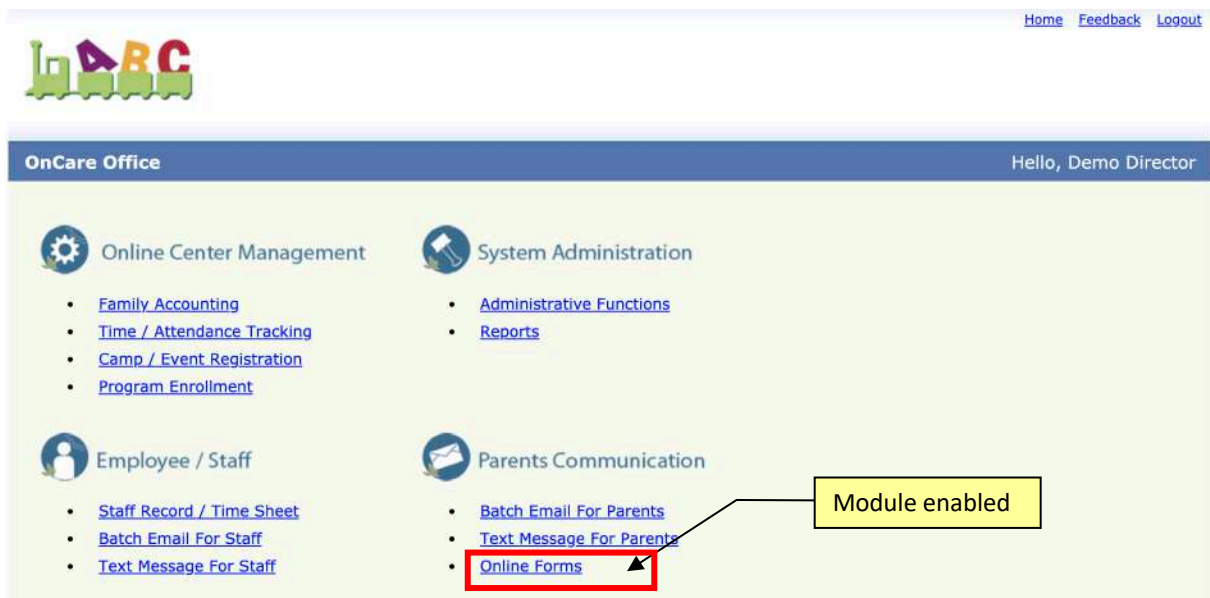
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# 1. What is The Purpose

This user guide explains the various features of the Online Forms module in OnCare.

The forms must be first setup in the backend by admin. Then parents can interact with the forms online via the Parent Portal.

OnCare has also created functions to help manage mandatory forms.



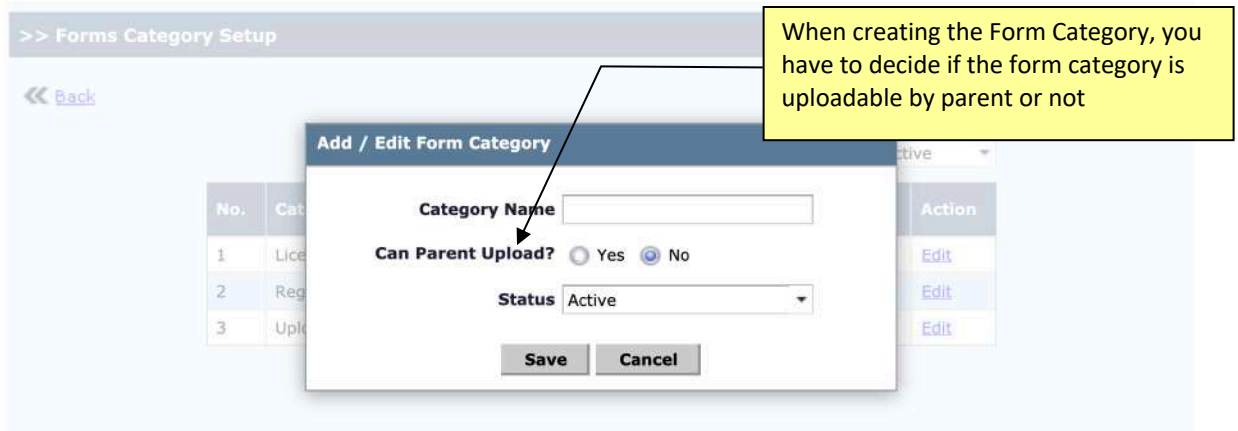
Note: If you do not see the Online Forms on the OnCare Office main page, please contact [clientsupport@oncarecloud.com](mailto:clientsupport@oncarecloud.com) to request the module be enabled for your center.

## 2. Online Forms Setup

Before you can take advantage of the Online Forms module, you must do the following setup:

- Forms Category Setup
- Add New Forms

The Form Category is designed to help organize the online forms and determine if the forms are uploadable by parents or not.



Following is a sample list of Form Categories:

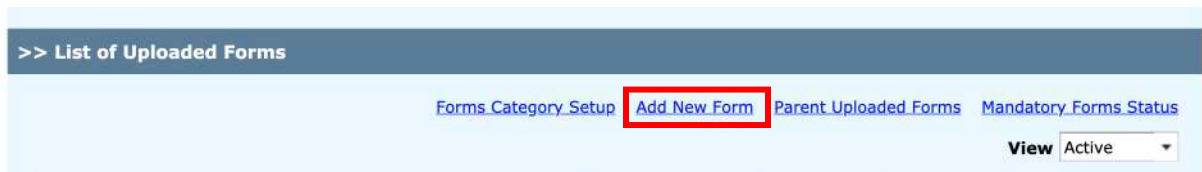
>> Forms Category Setup

[Back](#) [Add New Category](#)

View Active ▾

No.	Category Name	Can Parent Upload?	Status	Action
1	Licensing Form	Yes	Active	<a href="#">Edit</a>
2	Regular Forms (Download only)	No	Active	<a href="#">Edit</a>
3	Uploadable Forms	Yes	Active	<a href="#">Edit</a>

After you have setup the Form Category, you can now Add New Form.



When adding new form, you must select a form category. Depending on whether the form category is uploadable, you will have the choice of making the upload mandatory or not.

>> Add New Form

[Back](#)

**Form Name** Tuition Rates Sheet

**Description** Tuition Rates

**Forms Category** Regular Forms

**Effective From** 05/01/2019 **End Date** 12/31/2019

**Upload Form** Tuition Fees 2019-2020

**Note:** Allowed file types for the upload forms are pdf, doc, docx, txt, ppt, pptx, xls, xlsx, jpg, jpeg and png.

**Form Status** Active  No file chosen

This form category is not uploadable, thus there is no mandatory option.

>> Add New Form

[Back](#)

**Form Name** Child Transportation Waiver Form

**Description** Authorization and Waiver to Transport Child

**Forms Category** Uploadable Forms

**Is Mandatory Form?** ☒ Yes ☐ No

**Form Type** ☐ Per Child ☒ Per Family

**Effective From** 05/01/2019 **End Date** 12/31/2019

**Upload Form** transportation\_waiver.f

**Note:** Allowed file types for the upload forms are pdf, doc, docx, txt, ppt, pptx, xls, xlsx, jpg, jpeg and png.

**Form Status** Active

This form category is uploadable, thus there is the option to make it mandatory or not. In addition, you can also indicate if the form is per child or per family.

Following is a List of Forms Added:

>> List of Uploaded Forms								
<a href="#">Forms Category Setup</a> <a href="#">Add New Form</a> <a href="#">Parent Uploaded Forms</a> <a href="#">Mandatory Forms Status</a>								
								<b>View</b> Active ▾
No.	Form Name	Category	Is Mandatory?	Form Type	Status	Uploaded By	Uploaded On	Action
1	Parents Handbook	Regular Forms (Download only)			Active	Demo Director	05/12/2019	<a href="#">Edit</a> <a href="#">View Form</a>
2	Transportation Waiver Form	Uploadable Forms	No	Family	Active	Demo Director	05/12/2019	<a href="#">Edit</a> <a href="#">View Form</a>
3	LIC700 - Identification and Emergency Information	Licensing Form	Yes	Child	Active	Demo Director	05/12/2019	<a href="#">Edit</a> <a href="#">View Form</a>
4	2019-2020 Tuition Rates Sheet	Regular Forms (Download only)			Active	Demo Director	05/12/2019	<a href="#">Edit</a> <a href="#">View Form</a>

Note: All the forms you added in the backend will appear to the parents in the Parent Portal.

### 3. Parent Portal Form Functions

When parents login to the Parent Portal, they will see the Forms option in the left panel. If they click on View, they will see all the online forms you added.

Home

Questions

Logout

Family

Child

Payment

Camp

Forms

View

Upload

Uploaded Forms

Download

Programs

List of Forms

No.	Form Name	Description	Form Category	Form Type	Is Mandatory?	Action
1	LIC700 - Identification and Emergency Information	Identification and Emergency Information	Licensing Form	Child	Yes	<a href="#">Download Form</a>
2	Parents Handbook	Parents Handbook	Regular Forms (Download only)			<a href="#">Download Form</a>
3	2019-2020 Tuition Rates Sheet	Tuition Rates Sheet	Regular Forms (Download only)			<a href="#">Download Form</a>
4	Transportation Waiver Form	Transportation Waiver Form for Child	Uploadable Forms	Family	No	<a href="#">Download Form</a>

Parents can choose to upload a form by selecting the “Upload” link.

ABC Demo Center

Home Questions Logout

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Child

Payment

Camp

Forms

View

**Upload**

Uploaded Forms

Download

Programs

Upload Form

Forms Category

Select Here...

Description

Upload Signed Form

Select a file...

Browse...

SUBMIT >

Parents will see all the forms they uploaded when they click on the “Uploaded Forms” link.

ABC Demo Center

Home Questions Logout

Family

Child

Payment

Camp

Forms

View

Upload

**Uploaded Forms**

Download

Programs

Uploaded Forms

Family Forms

No.	Form Name	Description	Category	Uploaded On	Action
1	Transportation Waiver Form	Signed	Uploadable Forms	05/12/2019	<a href="#">View Your Form</a>

Adalyn Cox

No.	Form Name	Description	Category	Uploaded On	Action
1	LIC700 - Identification and Emergency Information	Signed	Licensing Form	05/12/2019	<a href="#">View Your Form</a>

## 4. Parent Uploadable Forms

This section explains how you can view and add to the parent uploadable forms.

Within each family record, you should see a “Family Online Form” link.

Main Menu Setup Reports Functions

**>> Edit Family Record**

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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](#) [Search](#) [Select](#) [Acct Ledger](#) [Info Sheet](#) [Authorized Person](#) [Family Notes](#) [Family Online Forms](#)

Family Account Key  [Prev](#) [Next](#)

Parent Information **Child Information**

Parent #1 (Sponsor)		Parent #2 (Co-Sponsor)	
First Name	<input type="text" value="Katie"/>	First Name	<input type="text" value="David"/>
Middle Name	<input type="text"/>	Middle Name	<input type="text"/>
Last Name	<input type="text" value="Cox"/>	Last Name	<input type="text" value="Cox"/>

When you click on the “Family Online Forms” link, you will see all the forms uploaded by the family.

**>> Upload Form**

[Back](#) [Upload Form](#)

Family Acct Key COX  
Parent #1 Name Katie Cox Parent #2 Name David Cox

**Family Forms**

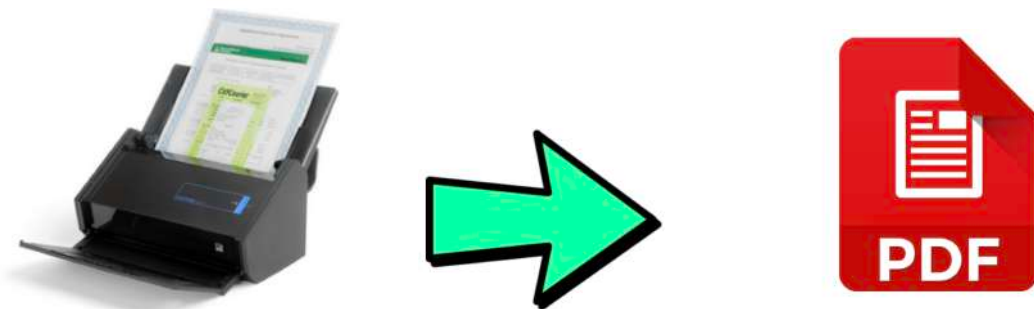
No.	Form Name	Description	Category	Uploaded On	Uploaded By	Action
1	Transportation Waiver Form	Signed	Uploadable Forms	05/12/2019	Katie Cox( Parent )	<a href="#">View</a> <a href="#">Delete</a>

**Child Forms**

Adalyn Cox

No.	Form Name	Description	Category	Uploaded On	Uploaded By	Action
1	LIC700 - Identification and Emergency Information	Signed	Licensing Form	05/12/2019	Katie Cox( Parent )	<a href="#">View</a> <a href="#">Delete</a>

We understand some families will not upload the forms online. Instead they might simply turn in the completed/signed form at the office. In this case, you can scan the completed form into PDF and upload the form for each family within OnCare.



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](#) [Search](#) [Select](#) [Acct.Ledger](#) [Info.Sheet](#) [Authorized Person](#) [Family Notes](#) [Family Online Forms](#)

Family Account Key COX Prev Next

**Parent Information** **Child Information**

**Parent #1 (Sponsor)** **Parent #2 (Co-Sponsor)**

First Name Katie First Name David

**>> Upload Form**

[Back](#) [Upload Form](#)

Family Acct Key COX  
Parent #1 Name Katie Cox Parent #2 Name David Cox

To view all the forms uploadable by ALL the parents to date, you can go to

Online Forms → Parent Uploaded Forms

**>> List of Uploaded Forms**

[Forms Category Setup](#) [Add New Form](#) [Parent Uploaded Forms](#) [Mandatory Forms Status](#)

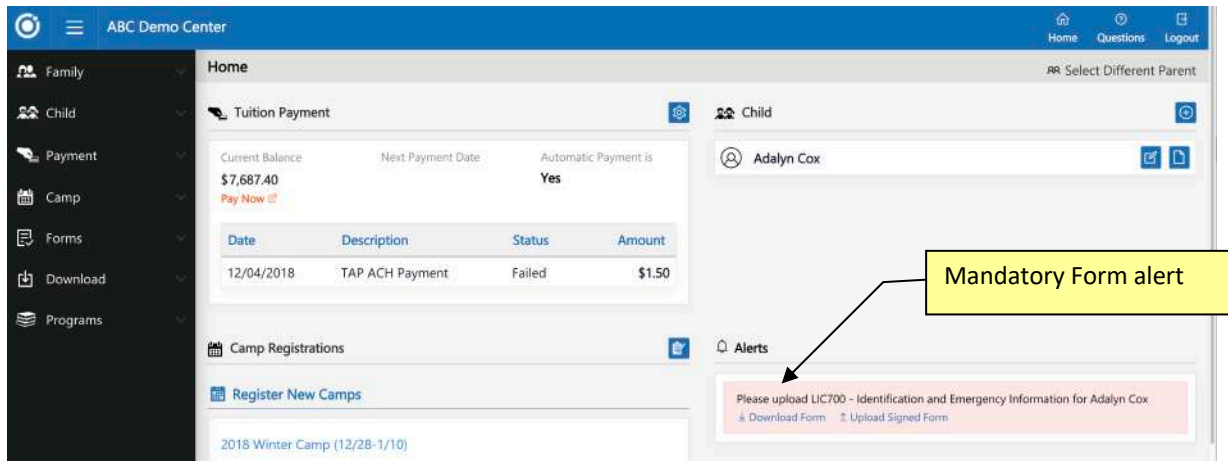
View Active



## 5. Mandatory Forms Management

OnCare has developed the following two features to help with the management of mandatory forms needed from the parents.

Any form that is tagged as mandatory, it will be prominently displayed on the Parent Portal home page as shown below. Once the parent has uploaded the mandatory form, the alert will disappear.



The second feature to help manage mandatory forms is that you can view the status of mandatory forms from all parents and send out reminders as needed.

Online Forms → Mandatory Forms Status



Click on the number of uploaded and not uploaded to view the status.

>> Mandatory Forms Status									
<a href="#">&lt;&lt; Back</a>									
<b>Form Category: Uploadable Forms</b>									
No.	Form Name	Form Type	Effective From	End Date	Is Mandatory?	Total Families	Total Children	Uploaded	Not Uploaded
1	Transportation Waiver Form	Family	01/01/2019	12/31/2020	No	54	56	<a href="#">1</a>	<a href="#">53</a>
<b>Form Category: Licensing Form</b>									
No.	Form Name	Form Type	Effective From	End Date	Is Mandatory?	Total Families	Total Children	Uploaded	Not Uploaded
1	LIC700 - Identification and Emergency Information	Child	01/01/2019		Yes	52	55	<a href="#">1</a>	<a href="#">54</a>


For the list of parents who haven't uploaded the form, you can select to send them an email reminder.

>> List of Families Not Uploaded "Transportation Waiver Form" - Send Reminder						
<b>Center</b> ABC Demo Center			<b>Category</b> Uploadable Forms			
<b>Form Name</b> Transportation Waiver Form			<b>Form Type</b> Family			
<b>Effective From</b> 01/01/2019			<b>End Date</b> 12/31/2020			
No.	Sel.	Family Acct Key	Parent Name	Child Name	Relationship Type	Email
1	<input type="checkbox"/>	ALVARADO	Michelle Alvarado	Ryan, Samuel	Parent #1	alvarado@gmail.com
2	<input type="checkbox"/>	ALVARADO	Diego Alvarado	Ryan, Samuel	Parent #2	mr.alvarado@gmail.com
3	<input type="checkbox"/>	ARNOLD	Allison Kamm	Savannah, Angela	Parent #1	z09parent1@oncareservices.com
4	<input type="checkbox"/>	BAILEY	Anna Bailey		Parent #1	z09parent2@oncareservices.com
5	<input type="checkbox"/>	BAYHAM	Luciana Bayham	Victoria	Parent #1	z09parent3@oncareservices.com
6	<input type="checkbox"/>	BURBANO	Nicole Burbano	Kaeden	Parent #1	z09parent4@oncareservices.com
7	<input type="checkbox"/>	BURGER	Melissa Burger	Daniel	Parent #1	z09parent5@oncareservices.com
8	<input type="checkbox"/>	CELESTE	Erin Thomas	Demonte	Parent #1	z09parent6@oncareservices.com
9	<input type="checkbox"/>	DAVIS	Tara Davis	Bella	Parent #1	z09parent8@oncareservices.com

>> Send Reminder Email to the Families Not Uploaded "Transportation Waiver Form"

**From** ABC Demo Center  
**Subject** Online Submission Reminder

**Message**



A rich text editor toolbar with various icons for text formatting, alignment, and insertion. It includes buttons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, insert image, and others. Below the toolbar are three dropdown menus and a row of additional formatting icons.

Please login to your parent portal account and go to Forms section to upload the signed form.

☐ Show last modified message