



OnCare Office Version 3.3.3 E9.3

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1 Program Enrollment – Automatic move of Past programs to Program History

Now, OnCare has provided a new feature in Program & Billing that moves the past programs automatically to the program history

(i.e.) Once program is ended (after the program end date is over), the status will display as **Completed** for 15 days and then it will be moved to **Program History** automatically.

Access Path: Family Accounting → Child Record → Program & Billing → Program History

Child Name
Jessy Test

Child Program & Schedule

Child Program

Program Name	Days Offered	Start Date	End Date	Status	Action
Two Years-Full Day-5 Days	M,Tu,W,Th,F	01/01/2019	05/06/2019	Completed	Edit Delete

[Add New Program](#)

Child Schedule

Two Years-Full Day-5 Days (01/01/2019 - 05/06/2019)				FTE Value: 0
Day	Time In	Time Out	Total Hrs	Classroom
Mon	07:00 am	02:00 pm	7.00	Not Assigned
Tue	07:00 am	02:00 pm	7.00	Not Assigned
Wed	07:00 am	02:00 pm	7.00	Not Assigned
Thu	07:00 am	02:00 pm	7.00	Not Assigned
Fri	07:00 am	02:00 pm	7.00	Not Assigned
Total			35.00	

Status will display as **Completed** after the program End date.

Child Selection:

Selected	Name	Age	Status	Action
✓	Jessy Test	3.1 Years	Active	Select Program

Save

Child Name
Jessy Test

Child Program & Schedule

Automatic Recurring Billing

Program History

Program Name	Start Date	End Date	Days Offered	Status	Modified On
Two Years-Full Day-5 Days	01/01/2019	04/30/2019	M,Tu,W,Th,F	Completed	05/16/2019 05:56 AM

[Add New Program](#)

[Program History](#)

[Add New Billing](#)

[View History](#)

The program will move to the **Program History** automatically after 15 days.

2 FTE Setup for Program Enrollment

OnCare has added FTE Setup to the Program Enrollment. The Maximum FTE value for a week is 1.0

Access Path: Program enrolment → Program Setup → Edit

> > Edit Program Setup

[Back](#)

School Year 2018 - 2019 (07/01/2018 - 06/30/2019)

Program Settings

Select Age Group: Infant

Program Type: Full Day - 5 days

Days of Schedule: ☒ Fixed Days Schedule ☐ Flexible Days Schedule

Select Days: ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri

FTE Value: 1.00

Program Name: Infant-Full Day - 5 days-5 Days

Accept Enrollments Now? ☒ Yes ☐ Not Now

Program Status: Active

Program Timings

Select Time: ☒ Same Time for All the Days ☐ Different Time for the Days

Start Time 1: 8:00 AM End Time 1: 12:00 PM

Start Time 2: 1:00 PM End Time 2: 3:00 PM

FTE value at Child Level:

FTE value will be displayed at program level as shown in the screen shot below:

Access Path: Family Accounting → Child Records → Program & Billing

Program Name	Days Offered	Start Date	End Date	Status	Action
Infant-Full Day - 5 days-5 Days	M,Tu,W,Th,F	10/01/2018	06/30/2019		Edit Delete
Infant-Full Day-3 Days	M,W,F	07/01/2019	05/31/2020		Edit Delete

Child Schedule

Infant-Full Day - 5 days-5 Days (10/01/2018 - 06/30/2019)

FTE Value: 1

Day	Time In	Time Out	Total Hrs	Classroom
Mon	08:00 am	12:00 pm	4.00	Not Assigned
	01:00 pm	03:00 pm	2.00	Not Assigned
Tue	08:00 am	12:00 pm	4.00	Not Assigned
	01:00 pm	03:00 pm	2.00	Not Assigned
Wed	08:00 am	12:00 pm	4.00	Not Assigned
	01:00 pm	03:00 pm	2.00	Not Assigned
Thu	08:00 am	12:00 pm	4.00	Not Assigned
	01:00 pm	03:00 pm	2.00	Not Assigned
Fri	08:00 am	12:00 pm	4.00	Not Assigned
	01:00 pm	03:00 pm	2.00	Not Assigned
Total			30.00	

Infant-Full Day-3 Days (07/01/2019 - 05/31/2020)

FTE Value: 0.6

Day	Time In	Time Out	Total Hrs	Classroom
Mon	08:00 am	03:00 pm	7.00	Not Assigned
Wed	08:00 am	03:00 pm	7.00	Not Assigned
Fri	08:00 am	03:00 pm	7.00	Not Assigned
Total			21.00	

Center Director can view and update the FTE value for each program as required by clicking on **Edit** under the specific Program.

Program Name	Days Offered	Start Date	End Date	Status	Action
Infant-Full Day - 5 days-5 Days	M,Tu,W,Th,F	10/01/2018	06/30/2019		Edit Delete

Add/Edit Program

Child's Age at the time of Enrollment: 8 Months
Age Group: Infant

Enrollment Start Date: 10/01/2018
Enrollment End Date: 06/30/2019

Program: Infant-Full Day - 5 days-5 Days
Fee: \$100.00 (Monthly)

Time Out	Classroom	FTE Value	Action
12:00 PM	Not Assigned	0.30	- +
3:00 PM	Not Assigned		+ -
12:00 PM	Not Assigned	0.10	- +
1:00 PM	Not Assigned		+ -
8:00 AM	Not Assigned	0.20	-

Director can update the FTE value for a child by clicking **Edit** option if required.

Note: Parents can view their Program and Schedule for their child in the Parent Portal.

3 Ability to Edit/Delete in Family Notes

OnCare provides the ability to Edit and Delete the Family Notes.

Access Path: Family Accounting → Family Records → Select Family → Family Notes

>> Family Notes

[Back](#)

Family Account Key JONATHAN

Parent #1 Name Alden William Parent #2 Name Pa

Note: To sort, click on the column header. Current sorted column header is highlighted in yellow.

Category	Notes	Recorded By	Recorded Date	Action
Enrollment	Termination notice received and processed for May 31st, 2019. Jot form finalized and also noted in TS.	oncare_cs_1590 customer support	5/17/2019 2:56:06 AM	Edit Delete

Add / Edit Family Note

Category

Enter a Note

Recorded By

Recorded Date 5/17/2019 2:56:53 AM

Click **Delete** to delete the Family Notes for this family

Click **Edit** to edit the Family Notes and then **Save**

4 Family Account Ledger Results – Sort by Ledger Balance

OnCare provides the Sorting Feature in Family Account Ledger Results page.

Upon clicking the **Ledger Balance** link, family list will be sorted based on the Ledger Balance of the family.

Access Path: Family Accounting → Family Account Ledger

Clicking **Ledger Balance** allows to sort the family by the Ledger balance

>> Family Ledger Search Results

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](#)

Batch Posting: [Special Batch Posting](#)

Ledger Balance as of: May 23 2019 View

No.	Family Acct Key	Child First Names	Parent#1 First Name	Parent#1 Last Name	Family Status	Ledger Balance	Action
1	KEVIN	Sham	Kenvin	Watson	Active	\$ -37.35	View/Edit
2	SAM	Bruce	Sam	B	Active	\$ -7.00	View/Edit
3	FAM2	Rosy , Rashmi , Shashi	C	cccc	Active	\$ 0.00	View/Edit
4	JONATHAN	Lillian	Aiden	William	Active	\$ 0.00	View/Edit
5	DENNIS	Sunny	Dennis	B	Active	\$ 10.00	View/Edit
6	CHRIST	Bob	Christen	George	Active	\$ 26.77	View/Edit
7	SAM1	Sindhiya	Veronika	Sam	Active	\$ 80.00	View/Edit
8	BEN	Sara , Bret	Ben	c	Active	\$ 90.00	View/Edit
9	SHORT1	Jimmy	Kevin	Short	Active	\$ 100.00	View/Edit
10	CODE	Jessy	Code	Test	Active	\$ 120.00	View/Edit
11	ONCARE	Child	OnCare	Test	Active	\$ 120.00	View/Edit
12	SHORT	Jimmy	Kevin	Short	Active	\$ 445.00	View/Edit
13	JHONSON	jerry	Jhonson	b	Active	\$ 790.00	View/Edit
14	B	Rita	Diana	B	Active	\$ 1,050.00	View/Edit
Total						\$ 2,787.42	

5 Family Information Sheet – Filters to exclude doctor/immunization/additional info

OnCare provides the ability to exclude the following fields from Family Information Sheet.

- Print Doctor Information
- Print Additional Information
- Print Immunization Information

Access Path: Family Accounting → Reports → Family Information Sheet/ Family Notes Report

[Main Menu](#)
[Setup](#)
[Reports](#)
[Functions](#)

Family Information Sheet

[Back](#)

Select Report: Family Information Sheet

Family Status: Active

Child Status: All

Primary Classroom: All

☐ Print Restricted Person details
☒ Print Child Photo
☒ Print Doctor Information
☒ Print Additional Information
☒ Print Immunization Information

Report Type: ☒ Pdf ☐ Html

Submit

Center Director can include/exclude this information while generating the report

6 Child Allergy Report with Child Photo

OnCare has enhanced the Child Allergy Report to display the child picture on it.

Access Path: Family Accounting → Reports → Child Allergy/ Medication /Special Diets Report

Child Allergy Report

[Back](#)

Select Report: Child Allergy

Family Status: Active

Child Status: All

Select a Classroom: All


Child Allergy: ☒ Yes
☐ No
☐ All

☒ Print Child Photo

Report Type: ☒ Pdf ☐ Html

Submit

Now, **Child Photo** can be included in this report if needed


Child Allergy / Emergency Contact Report						
Classroom Name : Green Room						
Photo	Child FN	Child LN	Allergy	Child Allergy Description	Physician Name Contact Phone	Emergency Contact Phone Number
	Julie	Adams	Y	EGG Allergy	Doctor: DR. Paul (427) 687-9800	Contact: Peter (427) 980-9093

7 Summer Camp - Online Payment Status View

OnCare provides a new feature to view the status of Camp Online Payments.


Access Path: Family Accounting → Online Tuition Payment → Camp Online Payment

>> Online Tuition Payment

**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 Batches](#)

**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.

1. [Review TPD Payment Status](#)


**Card Swipe Payment (CSP)**

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

1. [Process Card Swipe Payment](#)
2. [Review CSP Payment Status](#)

**Camp Online Payment**

1. [Review Camp Payment Status](#)

**Online Payment Enrollment**

Total Active Families

Total Active Payors

[Total Active Payors Enrolled in TAP](#)

[Total Active Payors Enrolled in TPD](#)

Total Active Payors Not Enrolled

[Online Tuition Payment Enrollment](#)

Online Camp Payment Status can be viewed by clicking this link

>> Review Camp Payment Status

[Back](#)

Select Dates

From To

Payment Type

Transaction Status

2019 - Summer Courses

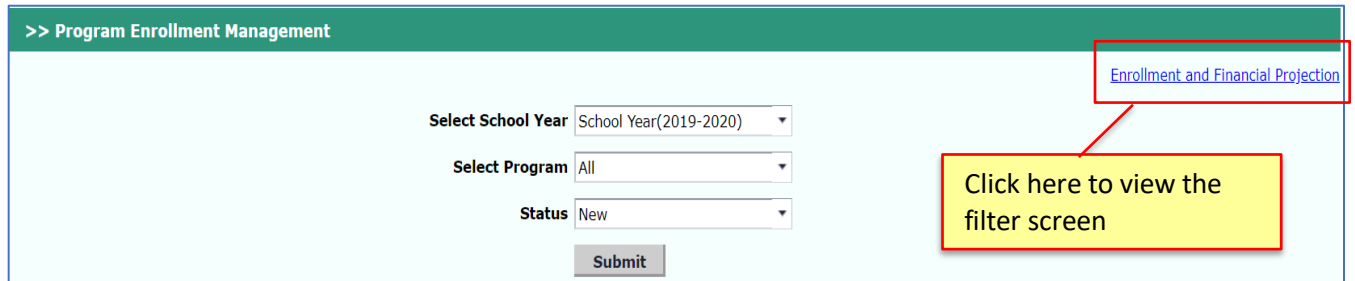
No.	Family Acct Key	Parent Name	Child Name	Payment Date	Amount	Reference ID	Payment Type	Status
1	JOSE	Jose Klein	Larry Morris	05/21/2019	\$ 163.36	OC00000002488	CARD	Processed
2	JOSE	Jose Klein	Larry Morris	05/21/2019	\$ 15.51	OC00000002489	CARD	Processed
3	RAYMOND	Raymond Crabtree	c z	05/21/2019	\$ 142.68	OC00000002483	CARD	Processed

Note: Parents can view their Camp Payment in Parent Portal

8 Enrollment and Financial Projection Report – New Program Filter

OnCare has enhanced the **Enrollment and Financial Projection** report with a new filter to select the program.

Access Path: Program Enrollment → Enrolled & Financial Projection → Select Center & School Year



>> Program Enrollment Management

Select School Year: School Year(2019-2020) ▼

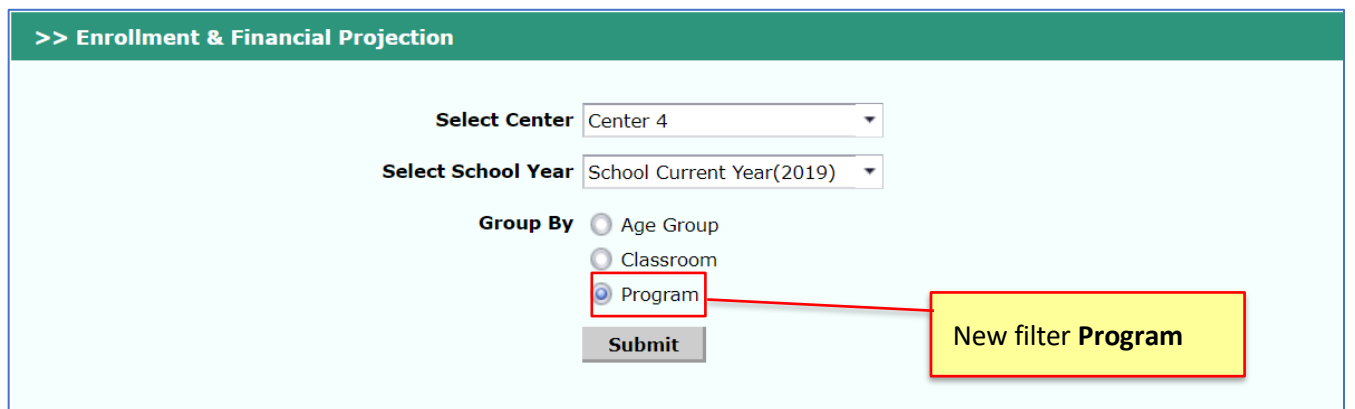
Select Program: All ▼

Status: New ▼

Submit

[Enrollment and Financial Projection](#)

Click here to view the filter screen



>> Enrollment & Financial Projection

Select Center: Center 4 ▼

Select School Year: School Current Year(2019) ▼

Group By: ☐ Age Group ☐ Classroom ☒ Program

Submit

New filter **Program**

9 Staff Missing Sign out Report

OnCare provides the ability to generate **Staff Missing Sign out Report**

Now the centers can find out the staff who missed to Sign out with this report.

Access Path: Staff Record/Time Sheet → Reports → Staff Missing Signout Report

>> Reports



Note: The system generates reports in new pop-up windows. If your Internet browser pop-up blocker is turned on, the report will be blocked. To learn how to turn off the pop-up blocker or allow pop-up from our system, [click here](#).

1. [Staff Time Sheet](#)
2. [Staff Absence Report](#)
3. [Staff Hours Summary Report](#)
4. [Staff Classroom Attendance Report](#)
5. [Staff Birthday Report](#)
6. [Staff Missing Signout Report](#)

New Report link

>> Staff Missing Signout Report

Select Dates

From  To 

Staff Status

Report Type ☐ Pdf ☐ Csv ☒ Html

Select the **Dates, Staff Status** to generate the Report

Staff Missing Signout Report			
Date Selected : Current Year		Date From : 01/01/2019	To : 12/31/2019
Date : 04/18/2019			
Staff Name	Staff Id	Department	Sign in
John, Stella	6666	121CCS	09:49 pm
William, Elizabeth	150		10:51 pm

10 Staff Hours Summary Report – More filters

Staff Hours Summary Report has been enhanced as follows:

New Filters:

- Staff Status (Active, Inactive and On Leave)
- Select Department
- Include Position

New Column on the report:

- Position

Access Path: Staff Record/Time Sheet → Reports → Staff Hours Summary Report

The screenshot shows the 'Staff Hours Summary Report' filter form. At the top, there is a navigation bar with links: [Main Menu](#), [Setup](#), [Reports](#), and [Functions](#). The form contains several filter options:

- Start Date:** 01/01/2019
- End Date:** 05/15/2019
- Staff Status:** All (dropdown menu)
- Select By Staff:** All (dropdown menu)
- Select Department:** All (dropdown menu)
- Show PTO Hours:** ☐ Used, ☐ Earned, ☒ Both, ☐ None
- Include Position:** ☒
- Include Department:** ☒
- Include Payroll Group:** ☐
- Report Type:** ☒ Pdf, ☐ Csv, ☐ Html

At the bottom, there are two buttons: **Submit** and **Back**.

Annotations (yellow boxes with red lines pointing to the form fields):

- Allows to select any available Staff Status (Active / Inactive/ On Leave) - points to the **Staff Status** dropdown.
- Allows to select Department from the available Drop-down list - points to the **Select Department** dropdown.
- Allows to include/exclude **Position** while generating the report - points to the **Include Position** checkbox.

New column **Position** is added

PTO Hours: Used

Date From: 01/01/2019 To 05/15/2019

Staff Name	Staff Id	Position	Time Clocked Hrs	Adjusted Hrs	PTO Types			Payroll Hrs		
					Vacation	Holiday	General pto	Regular Pay Hrs	OT Hrs	Total Payroll Hrs
Cooper, Selsia	1020	Head teacher	16.00	4.00	0.00	4.00	0.00	8.00	8.00	16.00
Michel, Ben	1800	Teacher	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Reece, Selsia	1503	Assistant teacher	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Remo, John	151	Teacher	9.55	9.55	0.00	8.00	0.00	17.55	0.00	17.55
William, Elizabeth	150	Teacher	8.16	8.16	0.00	0.00	0.00	8.16	0.00	8.16
		Total	33.71	21.71	0.00	12.00	0.00	33.71	8.00	41.71