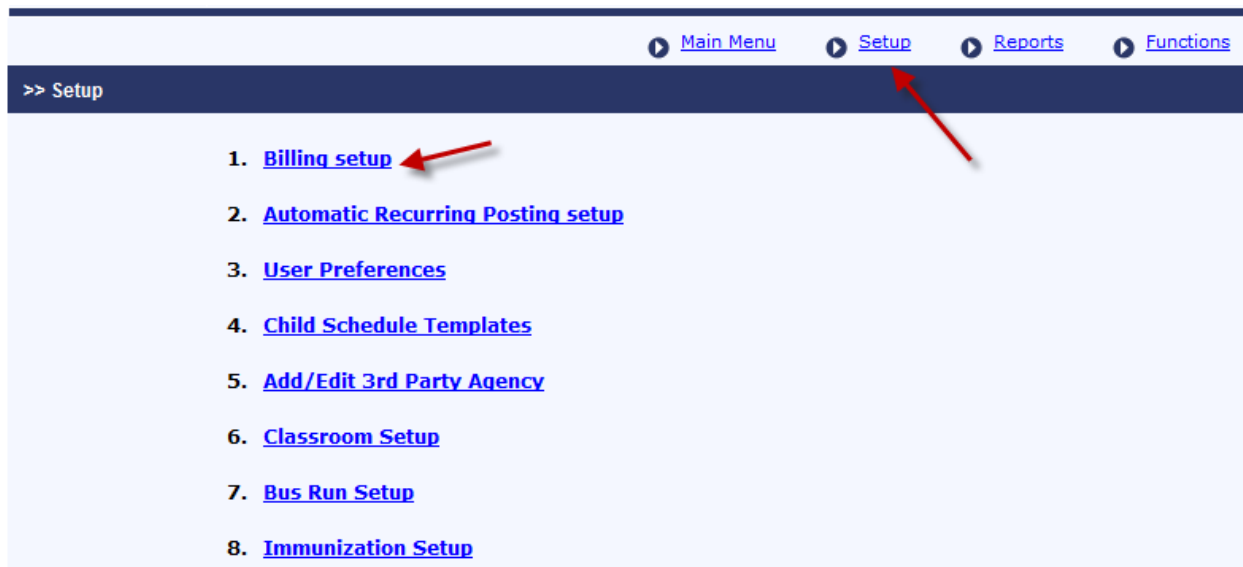


Initial Setup of OnCare Office

This document will provide you with a basic overview of some of the key areas you may want to setup in order to get started with OnCare Office. For more information on other areas, you can view our “quick start” guide on our website, view online tutorials at <http://www.youtube.com/oncareservices#>, or select the “help” menu from within OnCare Office.

1. Billing Setup: create your billing transactions for tuition payments, other charges, credit, payments and balance forward

- a. You can access your billing setup from the System Administration page or by selecting Family Accounting → Setup → Billing Setup



- b. Select the transaction type, enter a description, a standard amount, GL Code (if you need one), and hit save. Those transactions will now be available in your dropdown menus.

Transaction Type	Description	Standard Amount	G/L Account	G/L Account Description	Status
Select here... ▾	<input type="text"/>	\$ <input type="text"/>	Select Her ▾		Active ▾

View

No.	Transaction Type	Description	Standard Amount	G/L Account No	G/L Description	Status	Action
1	Tuition Charge	2 Day Schedule	\$ 100.00	4001	Tuition Charge	Active	Edit
2	Tuition Charge	2 Day Schedule/Monthly	\$ 400.00	4001	Tuition Charge	Active	Edit
3	Tuition Charge	3 day Schedule	\$ 150.00	4001	Tuition Charge	Active	Edit

2. Classroom Setup

- Setup your classrooms from the System Administration page or by selecting Family Accounting → Setup → Classroom Setup

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

>> Classroom Setup

[Back](#)
[Add New](#) | [Setup](#)

View

Classroom Name	Status	Display Order	Action
The Nest	A	▲ ▼	Edit
Chickadees	A	▲ ▼	Edit
Puffins	A	▲ ▼	Edit
Swans	A	▲ ▼	Edit
Falcons	A	▲ ▼	Edit

3. Family/Child Records: enter your parent information and child information

- In addition to entering the basic information, you will also want to enter the recurring billing. This should be used for any weekly or monthly billing that you want to post to the Family Account Ledger automatically.
- Select Add Row, select the Billing Cycle (weekly or monthly), and then fill in the desired information
- Note, to change the day of the week or month recurring billing posts to the account ledger, go to the Setup link (the same area you setup the billing types)

[Add New Child](#)

Name	Age	Status	Action
Sophie Davis	2.6 Years	Active	Edit Time Card Questions Delete
Jason Davis	11 Months	Active	Edit Time Card Questions Delete
Tommy Davis	5.10 Years	Active	Edit Time Card Questions Delete

Child Information

First Name: Last Name:
 Gender: Boy Girl
 Date of Birth: Age:
(MM/DD/YYYY)
 Primary Classroom: Secondary Classroom:
 Status: Program:
 Enrollment Start Date: Withdrawal Date:
(MM/DD/YYYY)
 Child ID Code: Withdrawal Reason:
 Bus Runs: [Edit](#) MinuteMenu Child Id:

Child Tuition

[Add New Row](#)

Billing Cycle:

Ledger Type	Transaction Type	Billing / Credit Description	Amount / Credit %	Comments	Start Date	End Date	Action
Sponsor	Tuitioncharge	Infant Full-time	300.00	Jason Davis			Edit Delete Add % Discount
		Sibling Discount	10.0%	Jason			Edit Delete
CCRM	Tuitioncharge	Infant Full-time	300.00	Jason Davis			Edit Delete Add % Discount
TAT	Tuitioncharge	Infant Full-time	300.00	Jason Davis	12/01/2011		Edit Delete Add % Discount

4. Create Authorized Persons

- a. Family Accounting → Family Record
- b. Select a family, and select Authorized Person (note, you must have a family entered in the system first, in order to add an Authorized Person)

oncare DEMO Family Accounting
Sandbox Boston

>> Child Info

<< Back

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

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

[Parent Information](#) [Child Information](#)

Children Summary

- c. Enter the information for the authorized person and hit “Save”

Sandbox Boston

[Select a Different Center](#) [Main Menu](#)

>> Add / Edit Authorized Person Details

<< Back

Family Account Key OSBORNE Parent #1 Name Andrew Osborne

First Name

Last Name

Relationship

ID Code

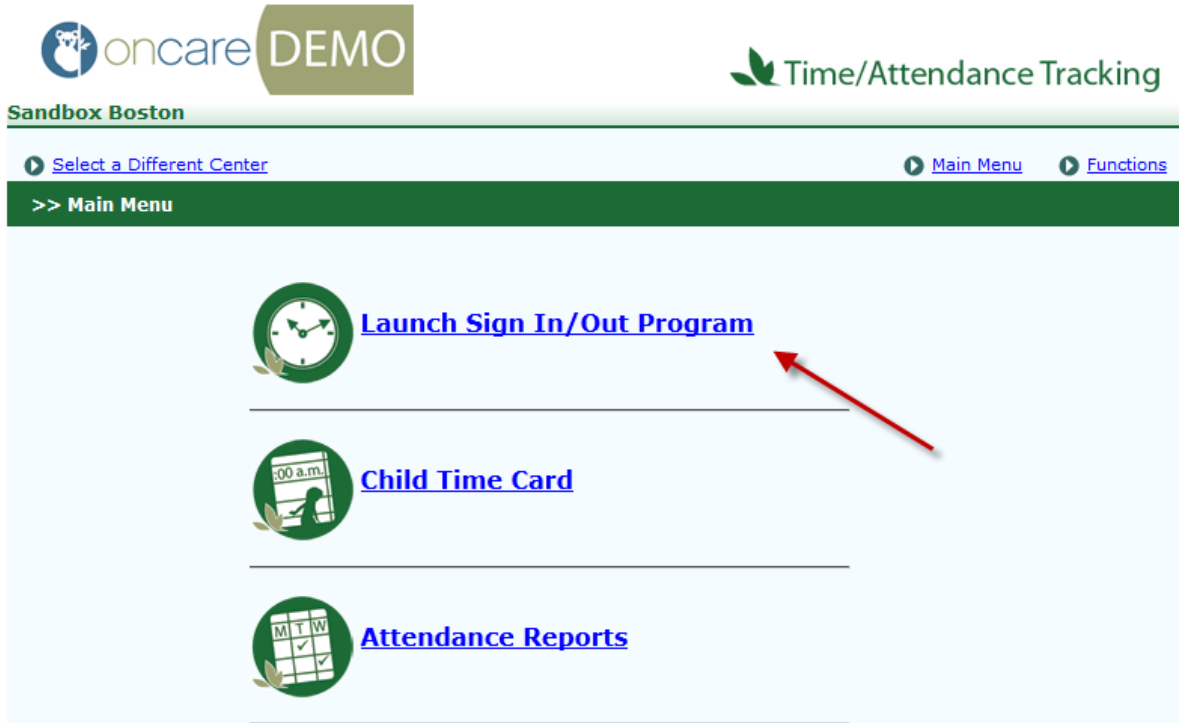
Status

Not Authorized for these child(ren) Ally Sally

Authorized Person Details [Print](#)

No	Name	Relationship	ID Code	Status	Not Authorized	Action
1	Andrew Osborne	Dad	1078	Active		Edit
2	Jordan Thompson	Friend	1101	Active	Ally	Edit

5. Launch the Time Clock and look up Attendance Reports
- a. Select the Time & Attendance module




oncare DEMO


Time/Attendance Tracking


Sandbox Boston

Select a Different Center Main Menu Functions

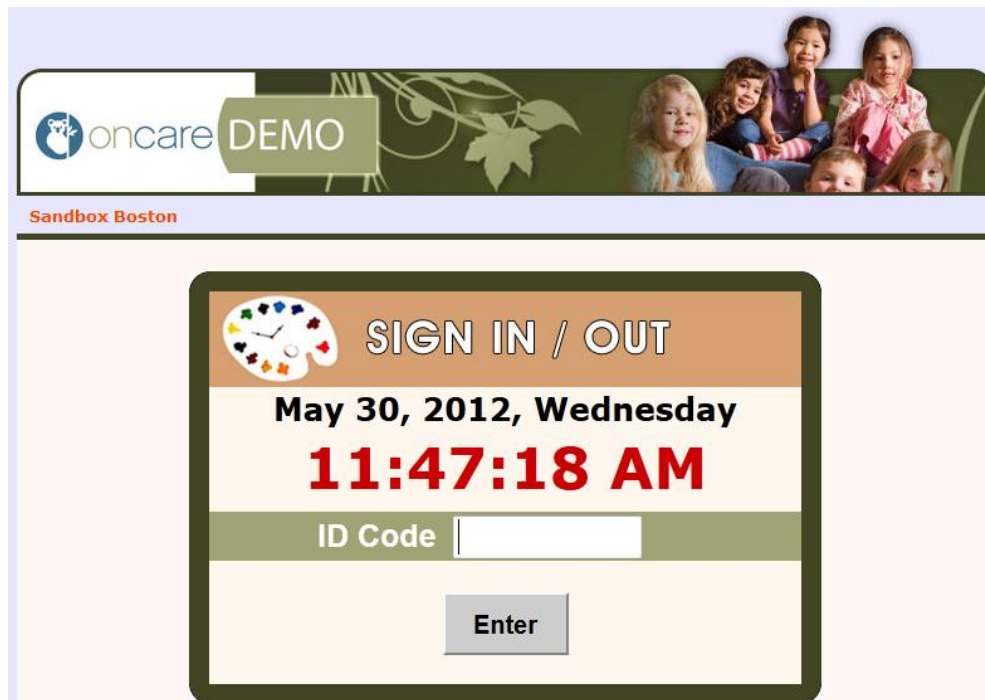
>> Main Menu

 [Launch Sign In/Out Program](#)

 [Child Time Card](#)


 [Attendance Reports](#)

- b. Launch the Time Clock: Time & Attendance → Launch Sign In/Out Program



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Sandbox Boston

 SIGN IN / OUT

May 30, 2012, Wednesday

11:47:18 AM

ID Code

Enter

- c. Run Reports: Time & Attendance → Attendance Reports → ID Code by Authorized Person

Sandbox Boston

[Select a Different Center](#) [Main Menu](#) [Functions](#)

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. [ID Code by Authorized Person](#)
2. [ID Code by Child](#)
3. [Children Currently Checked In](#)
4. [Center Attendance Summary](#)
5. [Billing By Attendance](#)
6. [Failure to SignOut](#)
7. [Late Pick-up Report](#)

6. Adding a Family

- a. There are two ways to add a family record; the administrator can do it, or you can invite the parent to do it.
- b. Hit “Add New” to enter the Parent and Child information yourself
- c. Select Functions, then “Send Parent Online Registration Invitation Email” to invite the Parent to fill out their own information

oncare DEMO Family Accounting

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

>> Main Menu

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](#)

 [Family Records](#)

Currently Checked In

Classroom	Children	Staff
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- d. You can invite new families or existing families to manage their own records. Families will receive an email to create a login. They can view their Account Statements in addition to making record changes, but of course cannot make changes to their classroom or billing setup (note, you can view any edits a parent makes)

Sandbox Boston

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

>> Select Families

[Back](#) [Existing Family](#)

Enter new family info to invite them for online registration:

No	Family Acct Key	First Name	Last Name	Email
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

[Continue](#)