



ONCARE OFFICE 1.5.11

RELEASE NOTES

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1. Family Account Statement Enhancements

In this release, the following two enhancements are made in the family account statement:

- Location address in Family Account Statement
- Enter Notes to be Displayed on the Statements Field

The above changes will be made in:

- Print Acct Statements in batch (Family Account Statements)
- Individual Family Acct Statement Generation
- Email Acct Statements (Batch Email)

1.1. Location Address in Family Account Statement

The location address setup in the Company Setup page will be displayed in the Family Account Statements. This will be displayed next to the Company Logo.

Print Acct Statements in batch / Individual Family Acct Statement Generation:

Page 1

Parent of Sally Acree, Jimmy Acree
Joshua Acree
8506 Pathfinder Ct.
Boston, Massachusetts 02128

Sandbox Boston
5678 Children's Way
Boston, MA - 02127
Phone : 866-921-4267

Family Account Statement

Company Name : Demo - Sandbox Learning Center
Center Name : Sandbox Boston

Family Acct Key : ACREE
Parent #1 Name : Joshua Acree

Child First Name : Sally, Jimmy
Provider Tax ID : 99-99999
Report Generated on : 04/11/2012 10:48 pm PST


Date From : 03/01/2012 To : 03/31/2012 Note : March 2012
Ledger Type : Sponsor
Payment Summary :
Total Payment : \$ 1,012.00

Beginning Statement Balance : \$ 2,306.00

No	Posting Date	Check #	Description	Comments	Charges	Credit	Balance
1	03/07/2012		4 Day Schedule/Monthly		\$ 800.00		\$ 3,106.00
2	03/07/2012		2 Day Schedule/Monthly		\$ 400.00		\$ 3,506.00
3	03/07/2012		Sibling Discount	Jimmy		\$ 40.00	\$ 3,466.00
4	03/07/2012		Sibling Discount	Jimmy		\$ 54.00	\$ 3,412.00
5	03/07/2012		Program Fee		\$ 25.00		\$ 3,437.00
6	03/08/2012		Payment - Check			\$ 1,012.00	\$ 2,425.00
Total					\$ 1,225.00	\$ 1,106.00	

Ending Statement Balance : \$ 2,425.00

Email Acct Statements:


Page 1

Parent of Sally Acree, Jimmy Acree
 Joshua Acree
 8506 Pathfinder Ct.
 Boston, Massachusetts 02128

Sandbox Boston
 5678 Children's Way
 Boston, MA - 02127
 Phone : 866-921-4267

Family Account Statement

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5	03/07/2012		Program Fee		\$ 25.00		\$ 3,437.00
6	03/08/2012		Payment - Check			\$ 1,012.00	\$ 2,425.00
Total					\$ 1,225.00	\$ 1,106.00	

Ending Statement Balance : \$ 2,425.00

1.2. Enter Notes to be Displayed on the Statements

A new Notes field 'Enter Notes to be displayed on the statements' will be added to the Filter pages for generating the Account statement. Users can enter the required notes and that will be included in the Family Account Statement as 'Note' next to Date From and To. If no text is entered, then this field will not be displayed in the Account Statement.

Print Acct Statements:

[Home](#) [Feedback](#) [Help](#) [Logout](#)


Sandbox LC Center #3

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

>> Print Acct Statement in Batch

[Back](#)

Select Dates

From  To 

Select Family Status

Select Family Type

Select a Classroom

Select Balance Type

Select Ledger Type

Do Not Print Voided Items on Family Account Statement

Enter Notes to be displayed on the Statements 

(Max 250 Characters)

Report Type Pdf Html

Individual Family Acct Statement Generation:

[Home](#) [Feedback](#) [Help](#) [Logout](#)

Sandbox Boston

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

>> Print Family Acct Statement

[Back](#)

Select Dates

From  To 

Select Ledger Type

Report Type Pdf Html



Do Not Print Voided Items on Family Account Statement

Enter Notes to be displayed on the Statements 

(Max 250 Characters)

Email Acct Statements:



[Home](#) [Feedback](#) [Help](#) [Logout](#)

Sandbox LC Center #3

Account Statement Batch Email

Dates

From  **To** 


Family Status

Balance Type

Do Not Print Voided Items on Family Account Statement

Ledger Type

Enter Notes to be displayed on the Statements



(Max 250 Characters)

2. Immunization Setup

From this release the users can add up to 25 active immunizations. Previously only 15 active records were allowed.

[Home](#) [Feedback](#) [Help](#) [Logout](#)




Sandbox Boston

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

>> Immunization Setup


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

View

Immunization/ Vaccination	1st (in months)	2nd (in months)	3rd (in months)	4th (in months)	5th (in months)	6th (in months)	7th (in months)	Status	Display Order	Action
DTP	2 - 2	4 - 4	6 - 6	15 - 18	48 - 72			A	▲ ▼	Edit
POLIO	2 - 2	4 - 4	6 - 18	48 - 72				A	▲ ▼	Edit
MMR	12 - 15							A	▲ ▼	Edit
HIBMENI	2 - 2	4 - 4	6 - 6	12 - 15				A	▲ ▼	Edit
VARCEL	12 - 15							A	▲ ▼	Edit
Pneumococcal (State specific)	2 - 2	4 - 4	6 - 6	12 - 15				A	▲ ▼	Edit
Hepatitis A vaccine (HAV)	12 - 15	15 - 18						A	▲ ▼	Edit
Hepatitis B vaccine	0 - 0	2 - 2	15 - 18					A	▲ ▼	Edit
Rotavirus	2 - 2	4 - 4						A	▲ ▼	Edit
Influenza	6 - 72							A	▲ ▼	Edit
Meningococcal	132 - 144							A	▲ ▼	Edit
Human Papillomavirus	133 - 144							A	▲ ▼	Edit

3. Child Care Facility Roster - Withdrawal Date

From this release, withdrawal date will be included in the Child Care Facility Roster report of Family Accounting.


Page 1

Company Name : Demo - Sandbox Learning Center
Location Name : Sandbox Boston

Child Care Facility Roster

Classroom Name : The Nest

Child Name Birthdate	Address	Parent Name Contact Phone	Physician Name Contact Phone	Date Enrolled	Date Withdrawal
Bobby Whitman 05/01/2011	11013 Perwinkle Lane Boston MA 02128	Carl Whitman Home: (781) 893-0053 Cell: (508) 315-3108	Dr. Love (508) 996-3232	07/15/2011	09/16/2012
Jason Davis 01/15/2011	6500 Tradesmill Court Boston MA 02128	Michael Davis Home: (617) 877-8862 Work: (617) 726-2112 Cell: (508) 650-9888	Dr Rosina Mann (617) 245-9737	04/15/2011	12/05/2012
Kenny Lawson 06/01/2011	996 Flatlick Rd Boston MA 02128	Shawna Lawson Home: (617) 867-1902 Work: (617) 888-9696 Cell: (508) 655-5290	Dr. Doodle (508) 445-4545	08/01/2011	05/23/2012
Sally Osborne 03/12/2011	4703 Vintage Creek Court Boston MA 02128	Andrew Osborne Home: (617) 828-5969 Work: (617) 555-1122 Cell: (617) 784-8393	Dr. Doodle (508) 995-5656	06/12/2011	
Vasu Ravi 01/02/2011		Vijailakshmi Rajagopalan	Dr. Smith (508) 323-2323	01/02/2012	

4. Customized Sorting Introduced in ID Code by Authorized Person Report

From this release the ID Code by authorized person report can be sorted by Authorized Person name and Child Name. Two new fields 'Sort Order 1' and 'Sort Order 2' has been introduced in the filter page of this report.

ID Code by Authorized Person Report:



The screenshot shows the 'ID Code by Authorized Person' report filter page. At the top, there is a navigation bar with links for Home, Feedback, Help, and Logout. The OnCare DEMO logo is on the left, and 'Time/Attendance Tracking' is on the right. Below the navigation bar, there is a 'Sandbox Boston' label and a 'Select a Different Center' link. The main title of the report is 'ID Code by Authorized Person'. The filter options are: 'Authorized Person Status' set to 'Active', 'Sort Order 1' set to 'Authorized Person Name', and 'Sort Order 2' set to 'Child Name'. The 'Report Type' is set to 'Pdf'. There are 'Submit' and 'Back' buttons at the bottom.

5. Data Download - Family and Child Basic

In family Data download, a new option 'Family and Child Basic' has been introduced in order to facilitate download of parent and child details together. This option will contain the following fields:

- Center Name
- Child Status
- Child First Name
- Child Last Name
- Parent 1 First Name
- Parent 1 Last Name
- Parent 1 Address
- Parent 1 City
- Parent 1 State
- Parent 1 Zip
- Child DOB

Family and Child Basic:

The screenshot displays the OnCare Family Accounting interface. At the top right, there are links for Home, Feedback, Help, and Logout. The OnCare DEMO logo is on the left, and Family Accounting is on the right. Below the header, there are navigation links for Main Menu, Setup, Reports, and Functions. The main content area is titled '>> Selection List'. It features three dropdown menus: 'Select Data' set to 'Family and Child Basic', 'Status' set to 'Active', and 'Child Status' set to 'All'. Below these are two columns: 'Data Fields' and 'Field(s) to Download'. The 'Data Fields' column lists: Center Name, Child Status, Child First Name, Child Last Name, Child DOB, Parent #1 First Name, Parent #1 Last Name, Parent #1 Address, Parent #1 City, Parent #1 State, and Parent #1 Zip. Between the columns are buttons: 'Add >>', 'All >>>', '<< Remove', and '<<< All'. To the right of the 'Field(s) to Download' column are up and down arrow buttons. At the bottom center is a 'Download' button.

6. Defect Fixes

The following defects are fixed in this release.

1. Send Tuition Pay Direct Invitation Email page, Logout link not working – Now will able to logout from this page.
2. Email Families, Inactive children displayed in search result – Now the child status is also verified. Hence, the inactive child records will not be displayed.