WELCOME:

OHC PAYMENT PROCESS AND ATTENDANCE CONFIRMATION TRAINING

 Record Meeting

Hi everyone and welcome to the OHC registration system training.

AGENDA

PAYMENT PROCESS, CONFIRMING ATTENDANCE, AND CLOSING OUT THE SUMMER

- How to run, indicate, and process payment in the OHC registration system
- How to generate a list of campers to send to each camp
- How to confirm campers' attendance
- How to process end-of-summer reconciliation

Today we are going to review the OHC administrative steps for payment processes, confirming attendance, and closing out the summer.

We will send out these slides after the call. I will pause periodically throughout this training to answer questions. You can put questions in the chat anytime and I will pause every few slides to read and answer them.

TIMELINE

April: Process and send initial round of payments to camps. This will be your largest round of payments and it's important to camps' cashflow to receive these payments in April/early May (ahead of the camp season).

June/July: Process and send second round of payments to camps. This will be a smaller batch of campers who applied since the first round (only if needed).

August: Process and send third round of payments to camps (only if needed).

August 14: 2025 OHC application closes to families.

August 14-September 19: Attendance confirmation process.

September 19: 2025 OHC system closes – no further changes can be made.

September-October: Payment reconciliation with camps based on attendance confirmation.

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Note: there will be other OHC-related things happening throughout the spring and summer (such as planning forms, camp visits, etc.) but these are the highlights as relates to the registration system.

PROCESSING PAYMENT

BEFORE PROCESSING PAYMENT:

- Campers must be in the status of "Enrollment Confirmed; Payment Pending".

- When an application is in "Payment in Process," you cannot make changes to it until the end of the summer attendance confirmation process.

WHEN YOU'RE READY TO PROCESS PAYMENT

Click here!

HOME   APPLICATIONS   REPORTS

View All Applications

Verify Enrollment - Notify Camps

Verify Enrollment - Confirm Enrollment

Payment Processing

Verify Attendance - Notify Camps

Verify Attendance - Confirm Attendance

Welcome to the Foundation for Jewis

Your OHC dashboard provides an ove   of grants in you

QUICK TIPS:

o To review current applications, cl

o For more comprehensive information and for downloadable excel spreadsheets, view the REPORTS tab.

o Contact us at OHCAdmin@jewishcamp.org

This is what the payment processing page looks like. You'll notice there are options to download a preliminary report and a final report. Running the final report moves those applications into status "Payment in Process," which we will discuss in more detail later in this training.

PRELIMINARY PAYMENT REPORT

Running a preliminary report is an important step to check if there are any mistakes such as duplicates or an error in session dates or grant amounts.

Correct any erroneous applications BEFORE running the final payment report. Email ohcadmin@jewishcamp.org if you need any support.

RUNNING A PRELIMINARY PAYMENT REPORT:

1. Make sure Preliminary Report is marked

2. Download Preliminary Report here

Download as excel

PAYMENT REPORT

Partner: PJ Goes to Camp

● Run as Preliminary Report   ○ Run as Final Report

Partner Name	Camp Name	FJCID	Camper Name	School Type	Grade	Session Length	First Time	FJC Amount	Partner Amount	Total Grant	Adjustments
PJ Goes to Camp	Berkshire Hills Eisenberg Camp	20182233928		Public School	6	12 days	Yes	$0	$700	$700	
	Sababa Beachaway	20182218722		Public School	9	42 days	Yes	$0	$1000	$1000	
	Camp Gan Israel Florida	20182209195		Jewish Day School	1	43 days	Yes	$0	$1000	$1000	
	Camp Dina	20182207946		Jewish Day School	7	24 days	Yes	$0	$1000	$1000	
	TheZone	20182203804		Jewish Day School	7	29 days	Yes	$0	$1000	$1000	

3. Review Preliminary Report in Excel. Note that each camp will appear on its own sheet plus a total summary sheet at the end.

4. Correct any errors you notice in the OHCRS.

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The downloaded Excel file will look something like this.

The last sheet in the file will have a summary page.

FINAL PAYMENT REPORT

Running the final payment report will move all of your campers from "Enrollment Confirmed; Payment Pending" into the status of "Payment in Process."

This indicates that the payment is being sent to the camp.

*Once an application is in the status of "Payment in Process," it **cannot be edited** until the end of summer Attendance Confirmation process.*

Note: "final" is a bit of a misnomer. "Final" refers to the final report for that batch of campers (as in once you run it, they move to the status Payment in Process and can't be moved backwards in the process). It is not your final report for the summer – by the end of the summer you will have multiple final reports, one for each payment round.

FOR LARGER PARTNERS:

- If you have more then 25 campers, scroll to the bottom and increase the number of campers per page.
- If you have over 100 campers, you will have to do this run payment process more than once.

1. Check off this box to confirm

2. Click here to update

as Final Report

CHANGE STATUS ×

Current Status: Enrollment Confirmed; Payment Pending

# of Applications Selected: 3

☐ These applications should be moved to the status payment in process.

UPDATE **CANCEL**

Once you click "Update," the final payment report will download and the campers will be moved to the status of "Payment in Process."
Repeat if necessary (if you have 100+ campers).

I'VE DOWNLOADED THE FINAL PAYMENT REPORT, NOW WHAT?

- Save a copy for your organization's records.

- Reach out to each camp to collect whatever info your finance team needs to process payment (ACH info, W9, mailing address, etc.) We recommend keeping a list on file that you can reference to in future years.

- Process the payments to each camp according to your organization's procedures.

- When you send the funds to camp, be sure to include the list of their campers and grant amounts from the payment report for whom you're funding.

CONFIRMING ATTENDANCE

Record Meeting
Hi everyone and welcome to the OHC registration system training.

CONFIRMING CAMP ATTENDANCE

Confirming campers' attendance at the end of the summer is a key step to closing out the season.

This establishes accountability between you and the camps, ensuring that OHC funds are applied as intended and returned if a camper no longer meets eligibility requirements.

This process begins after the system closes to new applications on August 14.
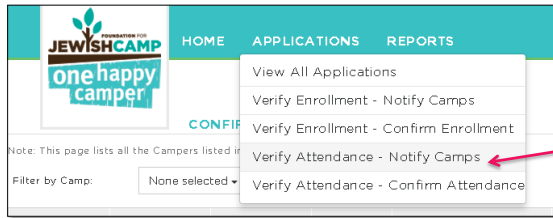
ATTENDANCE CONFIRMATION PROCESS

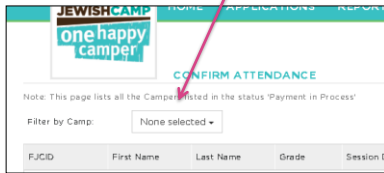This process looks similar to the enrollment confirmation process:

1. Prompt the camp(s) to confirm attendance.
2. Camp(s) confirm attendance.
3. Review what the camp has confirmed.
4. Reconcile payment with the camp(s) (if needed).

Step 1: Prompting the camp to confirm enrollment

HOME   APPLICATIONS   REPORTS

View All Applications
Verify Enrollment - Notify Camps
Verify Enrollment - Confirm Enrollment
Verify Attendance - Notify Camps
Verify Attendance - Confirm Attendance

Select the camps to notify (or select all)
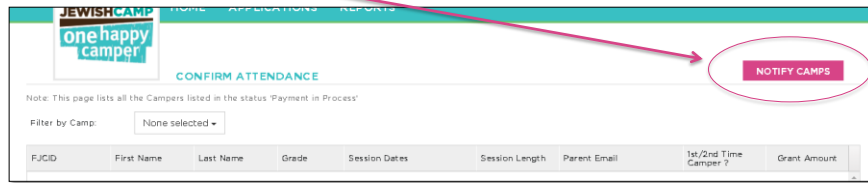
Note: If you have 25+ campers, scroll to the bottom and increase the number of campers per page. If you have 100+ campers, you'll need to do this process more than once.

CONFIRM ATTENDANCE

Note: This page lists all the Campers listed in the status 'Payment in Process'

Filter by Camp: None selected ▾

FJCID   First Name   Last Name   Grade   Session D

1 2 3 4 5 6 7 8   25 ▾ items per page
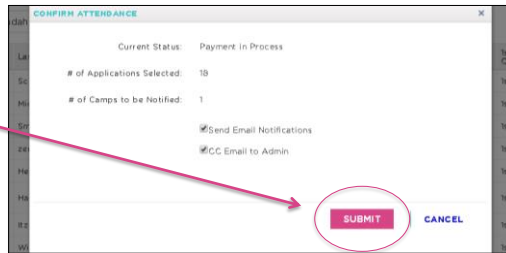
Step 1 (continued): Prompting the camp to confirm enrollment

Click "Notify Camps" button

Make sure checkboxes are selected and click "Submit".

Step 2: Camps should confirm attendance. Send them reminders as needed (FJC will also help with this).

Step 3 (on a rolling basis as camps respond): Funding partner confirms attendance.

Step 3 (continued):

If a camper attended camp for different dates than those listed on the application, the new correct dates will appear in the column "New Session Date." If their new dates result in a different grant amount, that new amount will appear in the column "New Grant Amount."

In the column "Approve additional grant?" you can select Yes/No depending on whether you have funds available to provide the increase in the grant amount.
If there is a reduction in session dates resulting in a decreased grant amount, you cannot deny the change.

Step 3 (continued):

CONFIRM ATTENDANCE

UPDATE STATUS

Camper Name	Camp Name	Parent Email	Old Session Date	New Session Date	Camper Attended Camp	Old Grant Amount	New Grant Amount	Approve additional grant ?	Select & Update
Avi Cohen	Camp Alonim	sghosh@medullus.com	06/02/2017-07/30/2017	06/02/2017-08/05/2017	☑	1000.00	1250.00	● Yes ○ No	☑
Jill Goldstein	Camp Ramah in the Berkshires	sghosh@medullus.com	06/02/2017-07/30/2017	No Change	☑	1000.00	No Change	○ Yes ○ No	☑

Once you review all of the campers, select the checkboxes on the rightmost column and click "Update Status."

Click "Update" again to update their status.

CHANGE STATUS

Current Status: Payment In Process

# of Applications Selected: 3

Status Updates:
2 camper attended camp
0 session changed
1 camper decline to go to camp

UPDATE   CANCEL

Important note: If any campers are cancelled or have a changed grant amount, you will need to run payment again.

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CAMPER ATTENDED CAMP (CAC) STATUSES

- Camper Attended Camp*: standard status for when a camper attended for the dates listed in the application.
- Camper Attended Camp; Session Change in Process: a camper attended for different dates than those listed in their application and their grant amount may be affected. This status is before you've run payment again for that camper.
- Camper Attended Camp; Session Change Applied*: Same as above, but this status happens after you've run payment again for that camper.
- Cancelled Application; Payment Cancellation in Process: a camper cancelled their camp enrollment or attended for fewer than 12 days so are no longer eligible. This status is before you've run payment again for that camper.
- Cancelled Application; Credit Applied*: Same as above, but this status happens after you've run payment again for that camper.

The statuses with asterisks are the final statuses for the applications. All applications should be in one of these statuses before the system closes on September 19.

RECONCILIATION

Once all of your campers' attendance has been confirmed, you need to reconcile their grants with the camps if anyone cancelled or has an increased or decreased grant amount.

To do this, you will need to follow the steps on slides 5-15 again to process payment and reconcile the funds with the camps.

REMINDERS & HELPFUL TIPS

- Since applications cannot be edited between the payment process and the attendance confirmation process, we recommend keeping a document for yourself listing any changes you learn of throughout the summer to ensure those applications are corrected during the CAC process.

- Start reaching out to camps now for their payment information if you don't already have it on file – you'll thank yourself later!

- Reminder that if a camper attended camp for fewer than 12 days, a cancellation is required. Cancelling their grant is important so that your funds can be returned and so the camper becomes eligible again for a future summer.

- If you have a waitlist, please continue to move campers off the waitlist throughout the summer if funds become available due to cancellations/reduced grants.

- Contact us at ohcadmin@jewishcamp.org for any support.

ANNOUNCEMENT

Marisa Braunstein and Sarah Schneider will be attending JPro25 in May. We hope to connect with you or your colleagues there! Reach out to us if you'd like to schedule time to connect during the conference.

QUESTIONS?