KeepCount

Getting started

Office staff at a licensed home child care agency

KeepCount guide for an agency's office staff: the screens explained

The whole explanation behind each step of the guide, with the section of O. Reg. 137/15 where a step depends on it. The guide itself: one screen and one line per step.

Screens from KeepCount 0.99.191, captured November 2, 2026 in a demonstration organization: everyone in them is fictional. Sections of O. Reg. 137/15 read on e-Laws October 20, 2026.

Step 1 Sign in

Open the link in your invitation email and choose a password. After that, sign in with your email and that password.

An owner or administrator of the agency invites you as office staff for your office. The link opens "Choose a password"; type it twice and save. You land on the dashboard. Your menu is short on purpose: Dashboard, Messages and Help, then Providers and the Calendar, then My training and My account. Your office's name sits in the top bar.

What office staff do in KeepCount: the providers of their office and their screening documents, their invitations and reminders, and messages to the office. What office staff do not do: record the homes' days, keep children's files, or see children's health information. The agency's owners and administrators do the rest, and a page that keeps those records says so when you open it.

To sign out of KeepCount, use Sign out at the top right of the screen; on a phone it is at the foot of the menu.

Step 2 The dashboard

The dashboard for your office: how many providers, how many have something overdue, Needs you, what is due right now, and recent activity.

The two figures at the top count your office's providers and the ones with something overdue. Needs you lists the providers' items that wait on you: a vulnerable sector check to apply for before its fifth anniversary, an offence declaration due, first aid expired, a document waiting to be verified. Each line opens the provider. Right now shows what today's records say is due. Licensing readiness is kept by the agency's administrators; your office's records count toward it. Recent activity lists what was done lately, with the person's name.

Step 3 Providers

Providers lists everyone your office has invited, with what needs attention, the office, the status and the progress.

Each provider's policies, quizzes, training and screening dates, from their invitation until everything required is done. "Needs attention" is the column to read first: an expired first aid certificate, a document due, a policy never confirmed. Search by name, email or city; filter by what needs attention or by status (Invited, In progress, Active or in progress, Inactive); "Columns" chooses what the table shows and "Download CSV" saves it. "Add provider" and "Invite a list" add people; a row opens the record. Progress reads "Policies 21/21 · Quizzes 0/21 · Training 0/0": the policies confirmed, the quizzes passed and the required training done.

Step 4 Add a provider

"Add provider": the name, the email, the region and the start date. Their invitation goes out when you save.

The form takes the full name, the email, a phone number, the region, an address and city, the start date and remarks (the person can see these). "Add provider" sends one invitation email with a link to choose a password; "Resend invitation" on the record sends another. In a demonstration no email leaves KeepCount: the button reads "Add without an email" and you get a link that opens KeepCount as the person. "Invite a list" invites several providers at once. Choosing the home is the agency administrators' step ("Add a home" under Homes): the page says so under the form.

Step 5 A provider's record

A provider's record: their progress, then five tabs: Policies & quizzes, Record & screening, Documents, Written answers and Home visits.

The four boxes at the top show the policies confirmed, the quizzes passed, the required training and when everything required is done. Policies & quizzes lists each policy with when it was confirmed, the quiz result, the attempts and the due date. Record & screening holds the dates; Documents holds the screening documents; Written answers holds the provider's written answers to policy and training questions, part of the training record, each to be marked as reviewed with a note where useful; Home visits lists the visits to their home. Visits are logged under Home visits by the agency's home visitors and administrators: O. Reg. 137/15, s. 26(1) asks for an inspection before the home is used, then one without prior notice at least once in every calendar quarter.

Step 6 The screening dates

Record & screening: the vulnerable sector check, the last offence declaration, the first aid expiry, the licence or placement status and notes.

The vulnerable sector check's date sets the fifth anniversary and the offence declarations between (O. Reg. 137/15, ss. 60 to 63); the first aid expiry sets its reminder. "Licence / placement status" is a few words of your own, such as "Approved, 3 spaces". Internal notes are read by the agency's administrators, never by the provider. The dates come from the verified documents: record or upload a check, a declaration or a first aid card on the Documents tab, and it shows here once verified. A date typed on this form before October 2026 stays until a document of that kind is verified.

Step 7 A document awaiting verification

Needs attention: "a newer one is waiting to be verified", with Open documents; on the Documents tab the new document has Open and Verify.

Each document has a status: Not on file, Awaiting verification, Current, Expiring soon, Expired. A provider uploads their own document from My details, or the office does; someone opens it, checks it against the original, and verifies it. A document you uploaded yourself is verified by another administrator, so no one clears a file alone. The document on file counts until the newer one is verified. "Upload newer" adds a renewal; "Record a newer date" is for a record kept only as a date, such as a health assessment kept in the organization's own files; "It was a mistake" and "Delete" take a wrong entry off the record.

Step 8 Verify it

"Verify": the dates and reminders update from the document, and the provider's record shows who verified it and when.

Verifying is the office's signature that the document was seen: the date issued and the expiry go on the record, Needs you changes on its own, and the reminders follow. Your agency's screening policies say how checks and declarations are obtained and how their confidentiality is protected (O. Reg. 137/15, s. 65(a) to (c)): the documents are read only by the people who manage the provider, and every opening is logged.

Step 9 Reminders and the record

On a record: Send reminder, Print record, Edit details, and under More Change sign-in email and Deactivate.

"Send reminder" emails the provider the policies to confirm, quizzes and training still outstanding. "Print record" prints the provider's file, with who printed it. "Edit details" changes their contact details, start date and remarks. Under "More", "Change sign-in email…" changes the address the person signs in with, and the person confirms the new address; "Deactivate" pauses a sign-in, and "Reactivate" on the inactive record lets the person back in. When someone leaves, the inactive record shows "Leaving…?": records of training and screening are kept for three years after they are made (O. Reg. 137/15, s. 82), so use "Remove access" when someone leaves; "Delete" only becomes possible after the retention date.

Step 10 Messages

Messages: write to your office, one of its homes, its providers or named people there; each sees it on their home screen, and replies come back to the office.

"Write a message" asks who it reaches and shows how many; the subject and the message; and whether to take replies. Each person sees on their home screen how many messages they have not read; replies come back to the office, and you see who has read it. No child's health details go in a message.

Step 11 The calendar

The calendar, read-only: closures and holidays, events, staff dates, due dates, drills and safety, by month, week or list.

The calendar draws the dates KeepCount already knows (documents expiring, drills and tests due, closures) beside the events the administrators add. Tick or untick Closed and holidays, Program and families, Staff, Due dates and Drills and safety to show or hide each kind, and choose Month, Week or List.

Step 12 My training

My training: your own policies to read and confirm, your quizzes and training, and your screening documents.

Office staff review the policies like everyone else: open each, read to the end, tick "I have read and understood this policy and will follow it", and take the quiz; completion shows on your record when everything required is done. Your own screening documents are here too; another administrator verifies them.

Step 13 My account

My account: your sign-in email, your password, two-step verification, a passkey for this device, your own documents, and the KeepCount updates switch.

"Change password" and "Add a passkey for this device" (Touch ID, Face ID, Windows Hello or a security key) are here; "KeepCount updates" chooses whether you receive the product's update emails. Two-step verification applies to administrators' logins when the organization requires it. The reminder emails you receive carry an unsubscribe link; this page has no switch for them.

Step 14 Help

Help: the guides to the regulation, the glossary, who to ask, and Report a problem.

"Where do I…?" at the top of Help, and "Go to…" at the top of every screen (Ctrl K, or ⌘K on a Mac), find the step of this guide for a few words such as "sign out" or "send reminder", with its whole explanation, then the pages and the glossary. When nothing matches, "Tell support what you were looking for" opens Report a problem with your words filled in. "Who to ask" names your office for anything about your account and the agency, and KeepCount support (hello@keepcount.ca) for the system itself. "Report a problem" sends what you saw and the screen to KeepCount support only, never to your agency.

The screens are from KeepCount 0.99.191, captured on November 2, 2026. Your agency's words for people and its policies may differ; the screens are the same.

Section numbers are O. Reg. 137/15 (General) under the Child Care and Early Years Act, 2014, read on e-Laws on October 20, 2026. This guide explains how KeepCount works; it is not legal advice, and the Ministry's program advisors decide compliance.