KeepCount

Getting started

The owner and administrators of a licensed home child care agency

KeepCount guide for an agency's owner and administrators: 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 November 2, 2026.

Step 1 Sign in

Sign in with your email and your password. Sign out at the top right when you leave a shared computer.

Your sign-in email and password are on the sign-in page; "Sign in with a passkey" is also on the page, for a login that has one (add it under My account). If you work in more than one organization with this login, KeepCount asks which one first.

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 Choose your office

Choose the office you are working in, or "All offices" to look across them. The choice stays in the top bar, where you can change it at any time.

An agency with more than one office asks "Which office are you working in?" before the page you asked for, once a working day (it asks again after twelve hours). Each office shows its name and where it is. "All offices" is offered to owners and administrators of the whole agency; the top bar then reads "All offices (view only)". Peel office and Niagara office are the demonstration's two offices. An agency with a single office is never asked.

Step 3 The dashboard

The dashboard: homes active, not inspected this quarter, due or late now, incidents open; then Needs you, Billing, the readiness score and recent activity.

The four figures at the top count the agency's homes. "Needs you" lists the items that wait on someone, the most urgent first, each with its office and, where it concerns one, its home; "See all" opens the whole list. Under "Billing" are the things family billing asks of you this month, when it is on. "Licensing readiness" gives the agency's score and each office's. "Right now" and "Recent activity" show today's records and the latest changes. "Add provider" and "Record one a provider phoned in" are the shortcuts at the top and the foot.

Step 4 Set up KeepCount

Set up KeepCount: five minutes of questions, then the steps in order. Each step is done once its records are in KeepCount.

"A few questions first" asks how many homes the agency oversees and how many home child care visitors it employs, whether children use a pool or another body of water at any home, whether dogs, cats or ferrets are kept, whether volunteers or students work with children in homes, and whether the agency is enrolled in the Canada-Wide Early Learning and Child Care System (CWELCC); "Save the answers" keeps them. The steps that follow are done once their records are in KeepCount, and the ones still open stay on your To do and in licensing readiness. When the guide is done, "Take the guide out of the menu" removes it.

Step 5 Offices

Offices: each office the agency works from, with its licence, address, phone, hours and closures. Its homes are on Homes.

Each office shows the number of overdue or missing items, a link to its licensing readiness, its licence number and expiry, the number of people, its address, phone and opening hours, and "Edit" and "Manage". "Add an office" adds another. A closed day is not counted in the daily-record check. The health units the offices work with are under "More".

Step 6 Logins and access

Logins and access: everyone with access to the admin panel, each with their own login. Add a login for an administrator, a home visitor or office staff.

Each person has their own login, so the activity log shows who did what. The list filters by access (Owner, Administrator, Supervisor, Office staff), by status (Active, Invited, Inactive) and by "Needs attention"; "Screening" and "Training record" open that person's record, "Open KeepCount as this person" shows what they see, and "Manage" changes their login. A home child care visitor has a login with supervisor access or more. "Download CSV" exports the list.

Step 7 The homes

Homes: one table with each home's children, last record, status, agreement, household screening and visit; the most urgent first.

The figures above the table are how many homes are open, how many children are signed in against the providers' own count, sleep checks late, and homes with no record for over an hour. The filters are All homes, Needs a look now, To follow up, Open now, Closed today or not opened, and Closed homes. "Add a home" adds one, choosing its provider, and "Register of homes" opens the register. A home's own page holds its record, its household, its agreement and what inspections found; the home visitors' guide walks through it.

Between visits, "Open a home" on a home's page shows what a visit looks at, from KeepCount's records only: the children here now against the limits, a crib or cot for each child who needs one, the sleep records of children under 24 months, each medication and product with the doses recorded today, each child's allergies and individualized plans, and what is running low. It also shows this month's home check, ticked by the provider: good practice between visits, never the inspection. The visit itself is recorded under Home visits, and each child's record it shows is logged as viewed.

Step 8 Providers

Providers: everyone the agency has invited, with what needs attention, the office, the status and their progress. Who needs attention comes first.

The filters are Needs attention, the status (Invited, In progress, Active or in progress, Inactive) and the office. A provider's record holds their policies and quizzes, their screening dates, their documents and their home visits, and the same page is where "Send reminder" and "Edit details" are. "Add provider" sends one invitation; "Invite a list" invites a list of providers at once. "Download CSV" exports the list.

Step 9 Home visitors

Home visitors: each visitor's approval, their homes, this quarter's inspections and their last visit.

Each row shows the visitor's office, the director's approval (with its date and "Open the letter"), the number of homes and how many have children, how many are still to inspect this quarter, and the date of the last visit. "Add a home visitor" adds one; they are then a supervisor of an office under Logins and access.

Step 10 Licensing readiness

Licensing readiness: the requirements KeepCount tracks for your agency, each with its status and evidence, for the agency or for one office.

The tabs are Organization-wide, Peel office and Niagara office, with the score for each and how many tracked requirements are met. The filters are Act on, Not tracked yet, Met, Good practice, Coming into force and Not applicable. Each requirement has an "Open" link to the page where its records are kept. "Export CSV" exports the list.

Step 11 Inspection day

Inspection day: the program advisor's visit on one screen, with what to act on first, what changed since last time and the usual questions.

The tabs are By Manual part, Since the last visit, Inspections by quarter, Questions, Find a file and In a home. Each part of the Manual lists its requirements with the section of the regulation, whether the agency's records meet it, and an "Open" button to the page where its records are. "Inspection binder" opens the binder. It is KeepCount's own list; some items are not due yet.

Step 12 The register of homes

The register of homes: each home, its address and provider, and every child cared for there, with the changes of the last 90 days.

The register is kept for the office you chose. It lists each home with its address and provider and every child cared for there with their address, privately placed children included. "As of" shows it for an earlier day. "Changes in the last 90 days" lists each placement and each departure with the day it happened, the day it was recorded and whether it was on time; weekends and statutory holidays are not business days. "Export CSV" and "Print" are at the top.

Step 13 Policies and quizzes

Policies & quizzes: the policies every provider must read and confirm, each with its quiz, and who has confirmed each.

The table lists the agency's policies in their order, with how many people have confirmed each and passed its quiz, its status, version, whether it has a quiz and its category. "Add policy" writes a new one, and "Annual review…" starts the yearly confirmation. Answers providers write in a quiz or a training item wait under "Answers to review".

Step 14 Incidents and serious occurrences

Incidents & serious occurrences: what affected a child's or a staff member's health, safety or well-being, open first. "Report an incident" starts one.

The filters are Open, Last 30 days, Last 90 days, Last 12 months and Everything, with Serious occurrences and Needs action counts. A serious occurrence has its own reporting and posting dates on the incident. An injury also needs an accident report with a copy to a parent.

Step 15 The quarter's home visits

Home visits: each provider's home is inspected before it is used, then without notice at least once every quarter.

The figures count homes with no visit on record, quarters to explain, homes not yet inspected in this quarter, and homes inspected this quarter without prior notice. The tabs are This quarter, By visitor and By quarter, and "Log a visit" records one. "Export CSV" exports the list.

Step 16 Family billing: this month

Billing: what needs you this month, with "Record a payment", "Record a bank deposit" and "Print"; Invoices, Payments and Family accounts are under it.

Where family billing is on, the menu has a Billing section: This month, Invoices, Payments, Bank deposits, Family accounts, Fee subsidy and Reports. An office sees and changes only its own families. "Needs you" lists what waits on the person: finishing the set-up, checking bank deposits, following up late families, looking over the month's invoices, and printing a fee subsidy claim. A demonstration shows fictional families and sends nothing.

Step 17 Provider pay

Provider pay: each provider's pay for a period, worked out from the attendance recorded at their home. Nothing is paid until you approve the period.

The tabs are Pay periods, Set-up and Year end, with the year chosen above. "Add a pay period" starts one for the days you pay, for example the 1st to the 15th. Provider pay is the owner's choice under Settings, Organization, Features.

Step 18 Settings

Settings: the agency's name, logo and contact details, and "Features": turn on family billing, the staff clock and provider pay, if your agency uses them.

The tabs are Organization, People and screening, Policies and training, Homes and visits, Families, Reminders and emails, Your data and Advanced, each with its own Save. Under Organization, "Features" lists Family billing, Staff clock-in and Provider pay, each on or off, with "Turn on" or "Turn off". Plan and billing has its own page, the owner's, for the plan, the invoices and cancelling. "Advanced" holds Ask the assistant, which is off until the owner turns it on.

Under Reminders and emails, "Automatic weekly reminders" emails everyone with outstanding items about 9 a.m. on the reminder day you choose, and sends a weekly summary for the office. "Weekly summary goes to" sets who gets it: all administrators, the contact email only, both, or nobody (reminders only). "Pause reminders until" holds the reminders for a closure.

Step 19 My account

My account: change your password, add two-step verification and a passkey, sign out your other devices, and change your sign-in email.

"Change password" asks for the current one and a new one of at least twelve characters. "Two-step verification" adds a six-digit code from an authenticator app each time you sign in. "Passkeys" signs you in with your fingerprint, face or device PIN. "Other devices" signs out everywhere but here, and a sign-in also ends by itself after seven days without use and thirty days after you signed in. "KeepCount updates" chooses whether you receive the product's update emails; "Delete my account" closes your login.

Step 20 Help

Help: who to ask, the guides, "Where do I…?", the glossary and "Report a problem".

"Who to ask" gives your office's contact address, KeepCount's, and the address for security or privacy. "Guides" opens the guides to the regulation, "Where do I…?" finds the step for what you want to do, and "The tour" is a short walk through the screens for your role.

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 November 2, 2026. This guide explains how KeepCount works; it is not legal advice, and the Ministry's program advisors decide compliance.