KeepCount
Getting started

The director of a licensed child care centre

KeepCount guide for directors: 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 0.99.162, captured October 29, 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.

The owner invites you as an administrator: you run the organization. The link opens "Choose a password"; type it twice and tap "Save and continue". You land on the dashboard, and the tour starts the first time; skip it or take it again from Help.

What an administrator does not do: billing (the plan, invoices and cancelling) unless the owner allows it, and deciding who is an owner or an administrator. Everything else, the owner's guide included, is yours: the people, the policies, the records, readiness and the binder, Settings.

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. If records made without a connection are still waiting to send, KeepCount says so and asks before it signs you out.

Step 2 The dashboard

The dashboard shows what needs you now: the four figures, Needs you, the readiness score, recent activity and the staff still in progress.

The readiness score is the share of requirements met, computed from the records in KeepCount. It is a measure of your records, not a Ministry verdict: the program adviser decides compliance.

Everything overdue, missing or due soon, by urgency, each line naming the person or record and the date. Fixing the record updates the status; nothing here is ticked by hand.

The four figures are today's: rooms in ratio at the last count, children signed in now, due or late now, incidents open. Messages from staff and from families wait at the top until you read them. "Remind everyone overdue (n)" sends one reminder email to each person with something overdue, and not again within 20 hours. "Recent activity" is the last five records; "Staff in progress" the people still working through their policies, quizzes and training, with their next due date.

Step 3 Needs you, in full

"See all" opens Needs you in full: Overdue, This week and Later, each line a person or a record with its date and the section behind it.

The demonstration's lines show the kinds of things that reach you: a staff member not cleared to work with children because an offence declaration was due 15 days after its anniversary (s. 62); one whose first aid and CPR expired, which "Needs attention" flags because s. 58(2) asks for the certificate from anyone counted in the ratio (s. 58(4) allows up to three months without it, on conditions; "Needs attention" is KeepCount's own rule); one who should apply for a new vulnerable sector check before the fifth anniversary (s. 62(1)); the annual playground inspection overdue (s. 24(5)(b)); a Ministry change to a required policy to issue to staff before January 1, 2027; a playground hazard made safe and waiting for its repair; a contravention to follow up; a stretch of next week the staffing schedule does not cover.

Each line opens the screen where the record is fixed. Nothing is ticked: the line leaves when the record changes.

Step 4 Staff

Staff lists each person with what needs attention, their site and position, their status, whether they are cleared, and their progress.

Each person's policies, quizzes, training and screening dates. Enter a vulnerable sector check or first aid date once; KeepCount works out the renewal and reminds the person, and you, before it lapses.

"Needs attention" is the column to read in the morning: an expired first aid certificate, a document due, a policy never confirmed. "Cleared" says whether the person may work with children and be counted in the ratio, from their verified documents. Sort by any heading; search by name; the chips count the statuses. "Add staff member" and "Invite a list" add people; a person's own row opens their record.

Step 5 A person who is not cleared

Open the person: the callout says why they are not cleared and what to do; the pills say In progress and Not cleared to work with children.

A vulnerable sector check before a person begins (O. Reg. 137/15, s. 60(1)), a new one on or before every fifth anniversary and an offence declaration in every calendar year in between, no later than 15 days after the anniversary (s. 62(1) and (2)); standard first aid with infant and child CPR for everyone who may be counted in the ratio (s. 58(2)); a health assessment and immunization before employment (s. 57(1)). KeepCount reads the verified documents and says whether the person is cleared to work with children and cleared to count in the ratio; the callout lists each gap with its section and a link to the documents.

A person who is not cleared still signs in and reads their policies; the room tablet says "Not cleared yet" beside their name and asks the supervisor before they are counted or left alone with the children. Your screening policies say what measures protect the children while a check is outstanding (s. 65(e)).

"Send reminder" emails the person the policies, quizzes and training still outstanding; "Print record" prints their file for the binder; "Edit details" changes their contact details, start date and remarks (the Rooms card on the record sets their rooms); "Remove access" ends their access when they leave: they can no longer sign in and their phone number and address are removed, while their name, acknowledgements, quiz results, training, screening and documents stay on file for the retention period (three years); "Deactivate" only pauses a sign-in, and "Reactivate" lets the person back in. "Lock this person" is for a lost phone or a login that someone else used: it blocks the login now, signs the person out on every device, stops their alerts and, after a lost device or misuse, removes their authenticator app and passkeys, unless the person also belongs to another organization: then KeepCount support removes them. An owner or administrator uses "Set up again" on a locked person to let them back in; they get an email and set the authenticator up anew.

Step 6 Cleared to work, and to count

The Documents tab: "Cleared to work and to count in ratio" says what is still needed before working with children and before counting; then each document.

Each document has a status: Not on file, Awaiting verification, Current, Expiring soon, Expired. A document a person uploads themselves waits until an administrator opens and verifies it ("Verify"); verifying a vulnerable sector check, an offence declaration or a first aid certificate updates the record dates and the reminders, and a verified vulnerable sector check clears the "supervised only" restriction when it was prepared no more than six months before you obtained it (s. 59(2)(b)). A volunteer or student on placement may give a copy of an older check, under five years old, with an offence declaration covering the time since (s. 60(3)). You cannot verify a document you uploaded yourself: another administrator does, so no one clears their own file.

"Record a newer date" is for a document kept on paper only (date only, no file); the date counts the same.

Step 7 Upload a newer document

"Upload newer" on a document: the file, the date issued, the expiry and a note. Verify it, and the record dates and reminders update.

The dates are what the readiness list and the reminders read: a vulnerable sector check's date sets the fifth anniversary and the offence declarations in between; a first aid course date sets its expiry. Until the new document is verified, the one on file counts. The people's documents and dates are kept for the retention period and go in the binder's screening part with the date each was verified and by whom.

Step 8 Arrivals and absences

In the morning, Arrivals and absences: who is expected and not here with no word, so the safe arrival policy's calls are made and recorded.

The regulation requires the safe arrival and dismissal policy to set out the steps to take when a child does not arrive as expected (O. Reg. 137/15, s. 50(b)(i)); KeepCount's way of supporting it is to list each such child and keep the steps taken ("Record a step", "Mark absent", "Record the outcome"). Under the heading is your centre's own rule for who calls and when the supervisor decides the next step. "Follow-ups still open" are the children whose absence is not explained yet; "Absent today" has the reasons parents gave; "Expected later", "Here now" and "Gone home" follow the register through the day.

Step 9 Checks today

Checks today is the board of every room's counts and checks: done, coming up or overdue. A missed check is explained and signed off here.

Each cell is a check: head counts, sleep checks, the opening check, the playground check, sleep monitors, sanitizing and the closing check, per room. "Record what happened" explains a check that was not done at its time and records it as missed; "Sign off" is the supervisor's or administrator's signature on the explanation, which the close-out counts as a miss with a reason. The legend reads done, recorded late, due, overdue, missed with an explanation, and missed, explained and signed off. The day picker reads an earlier day.

Step 10 Medication today

Medication today: the scheduled doses, the medication given on symptoms, sunscreen and other products, each with its written authorization and Record the dose.

A drug or medication is given to a child only where a parent gives written authorization with a schedule of the times and amounts, is stored as its label instructs, and, under the written procedure the regulation asks for, a record is kept of each dose given (O. Reg. 137/15, s. 40(1)). Each line shows the child, the medication, the dose and when, from the authorization in the child's file; "Record the dose" records given, refused or missed, with the time and an observation; "Open the log" shows the day's doses and prints the record for the parent. The daily limit for medication given on symptoms is KeepCount's own field on the child's file ("at most 4 a day"; the regulation names no limit); check it before a second dose.

Step 11 An incident and its follow-up

Open an incident: what happened, then the follow-up: the supervisor's review, corrective actions given to a person with a date, and Close the incident.

The daily written record and the serious-occurrence trail: the time you became aware, the Ministry report with its reference, and the posting dates. Readiness shows a report that went past 24 hours.

The regulation requires a daily written record summarizing any incident affecting the health, safety or well-being of a child or a staff member, and, for a child's incident, a parent notified unless already told of it under s. 36 (s. 37). The follow-up is yours: "Supervisor's review" moves the incident to reviewed; a corrective action is given to a named person with a date, who sees it under "Follow-ups given to you" and marks it done; "Close the incident" closes it once every action is done, and for a serious occurrence once the Ministry report is recorded. A serious occurrence (s. 1: the death of a child; abuse, neglect or an allegation; a life-threatening injury or illness; a child missing or temporarily unsupervised; an unplanned disruption of normal operations that poses a risk) is reported to an inspector or program adviser within 24 hours of the licensee or supervisor becoming aware of it (s. 38(1)(b)); the "Ministry reporting" card keeps when you became aware, the CCLS report and reference, and the posting dates. An injury also needs an accident report with a copy to a parent (s. 36(4)), printed from the form. For an allegation of abuse or neglect the form asks "Is it about someone who works here?": choose the person, or "Not someone who works here"; the person named does not see the record or what is done about it unless they are an owner, and each owner still reads every allegation.

Step 12 Close out the day

At the end of the day, Close out the day: the checks not done at their time, the incidents of the day, counts below what was allowed, a note, and Sign the day.

The close-out is the day's written record signed. It lists the checks not done at their time (each with "Open" to record it or explain it), the incidents of the day (or the statement that none affected a child's or a staff member's health, safety or well-being), the counts below what was allowed with what happened and what was done, and a note for the day. "Sign the day" is enabled once the blockers are cleared; "Print the daily record" prints it. Records entered more than 30 minutes after the moment they record (saved offline, done earlier, corrected) are listed as "Entered later", and anything added after the day was signed is shown as such, so the record never hides a late entry.

Step 13 The daily log

The daily log for a day: every record with its time, room, what it was and who recorded it, filtered by kind, with Correct beside each.

The log is the attendance record (arrival and departure times or an absence, s. 72(3)), the head counts, room checks, sleep checks, outdoor time and incidents of one day, in time order, with who recorded each. A correction references the original and keeps both: daily records are never overwritten. "Needs a look" flags what a supervisor should read first. "Export CSV" and "Print" give the day to an inspector; "Record on Rooms" opens the tablet for the day. A month at once: "A month's attendance" in Inspection day's More row lists each child's days attended, hours, hours in each licensed age group (s. 72(4)) and days absent, with what to correct first (a visit with no departure, a day the child was expected with nothing recorded); "Print every sheet" prints one page a child with lines for a parent or guardian and a supervisor to sign, as a fee subsidy office or a family may ask for it, and both the totals and each day export as CSV.

Step 14 Write to staff

Messages: write to everyone, a site, a room or named people; each sees it on their home screen, and you see who has read it.

"Write a message" asks who it reaches (everyone in the centre, everyone at a site, the staff of a room, or people you choose) and shows how many; the subject and the message; and whether to take replies, which come to the office only. No child's health details go in a message: a message is kept with the organization's records for its retention period. Staff see it at the top of their home page until they read it; the thread shows who has read it and the replies. With Families on, a Families tab writes to a child's family the same way.

Step 15 Licensing readiness

Licensing readiness is the regulation as a list: the score, what is overdue, missing and due soon, and every requirement with its status and its section.

The whole regulation as a list, each line with a status from your records, the section behind it and "Why this matters". Record evidence for approvals and inspections here; mark a line not applicable only when it truly is.

Read it by site and by chip: Needs attention is the week's work. Each requirement says what satisfies it here, who is reminded, what the binder shows and what the program adviser asks; "Read the section" opens e-Laws. The statuses are based on your records in KeepCount; they are not the whole regulation, and the Ministry decides compliance.

Step 16 A Ministry change to review

Ministry changes lists a regulation change to a required policy, prepared by KeepCount. Nothing changes for staff until you decide.

When O. Reg. 137/15 changes, KeepCount's library writes the change into the affected policy and brings it to every organization as a change to review, with the date it comes into force. The demonstration's is the supervision policy: from January 1, 2027, every centre's written supervision policy must say when, how and how often children are counted, the strategies for higher-risk moments (transitions, washrooms, arrivals and dismissals, outings, gates, places where sightlines are blocked), the steps when a child is unaccounted for, and who is responsible for each (s. 11(2), added by O. Reg. 197/26). The Policies page shows "1 Ministry change to review" until it is done.

Step 17 Issue the new version

Open the change: what changed, the places where your words and KeepCount's both changed, the policy with the change marked, then "Issue new version to staff…".

Where your centre rewrote a part the change also touches, choose "Keep the organization's", "Use KeepCount's" or "Keep both" for each place; "Edit first" opens the draft to write anything still marked; "Already covered…" records where your policy covers the change already. "Issue new version to staff…" asks when staff get it (now, or on a date), whether they take the quiz again, and what changed, for staff; the new version then goes to everyone to read and confirm again, with "what changed" shown beside it and kept in the policy's history. A change issued before its date in force shows staff the date.

Step 18 Drills

Drills: the last 12 months by site, each month's fire drill, the missing-child drills from 2027, and Record a drill.

Fire drills every month, and from 2027 missing-child drills at least once every three months. Recording one takes thirty seconds; the readiness list shows when the next is due.

A fire drill at least once a month in accordance with the Fire Code, a written record of every drill and every test of the alarm and the fire protection equipment kept at least 12 months (s. 68(1)(e)), each staff member instructed on their fire duties before their first day, and the procedure approved by the fire chief posted in every room used for children (O. Reg. 137/15, s. 68(1) and (2)). From January 1, 2027, a missing-child drill at least once every three months with its record kept at least 12 months (s. 68.2(3)). The grid shows each month; a month without a drill is visible before an inspector sees it.

Step 19 The staffing schedule

The staffing schedule: the week's shifts, the usual week, who can count, and "What falls short this week" with each stretch that is short.

"What falls short this week" reads each day hour by hour against Schedule 1: short of staff, short of qualified staff, over the group size, or not scheduled, each with the hours and the room. "Add a shift" asks the person, the day, their role (counted in ratio, supervisor, float, cook or office, volunteer or student), the room and the hours; a person not cleared for the ratio is marked so. "Copy last week" and "Fill from the usual week" save the typing; "Who can count" lists who may be counted in the ratio today, from their clearance.

The ratio of staff to children and the maximum group size for each licensed age group must be kept, on the premises and on outings (s. 8(1); a licensed family age group follows s. 8.1), with the reduced ratio allowed only during arrival, departure and rest and never for infants or outdoors (s. 8(4)); the schedule plans for it, the head counts prove it.

Step 20 Compliance observations

Compliance observations: who is due to be observed, the contraventions to follow up with a Close button, and the observation log.

Every licensee needs written policies on how compliance with its policies, procedures and individualized plans is monitored, recorded and addressed, and how contraventions are (O. Reg. 137/15, s. 6.1(7)), with the records kept for three years (s. 6.1(8)). "Record an observation" records a person observed, the policy, the date and whether they complied or contravened it; a contravention opens a follow-up with a date, closed with how it was addressed ("Close it"). If a contravention was also a serious occurrence (a child missing or left unsupervised, a life-threatening injury or illness, or abuse or neglect), the form asks which one; it is reported to the Ministry within 24 hours of the licensee or supervisor becoming aware of it (s. 38(1)(b)), and once the observation is saved the incident form opens on it. "Who is due" paces the observations by the months you set between them. The binder prints the log.

Step 21 Playground

Playground: the daily and monthly inspections, and the repair log with each hazard, how it was made safe, the target date and the repair.

Daily, monthly and annual inspections of the outdoor play space, the fixed play structures and the surfacing as the CSA standard sets out, with a plan for how issues found are addressed (O. Reg. 137/15, s. 24(5)(b) and (c)). The daily check is the room's playground check before outdoor play; the monthly inspection is recorded here ("Record this month's"), with an issue found opening a repair; the annual inspection, which s. 24(5)(b) asks to follow the CSA standard, is evidence on Licensing readiness, where the record takes who inspected, the date on the inspector's report, the report itself (a PDF or photos of it) and whether it found anything to fix: each hazard you list there, with where it is and what it is, goes into this repair log in the same save. The repair log keeps each hazard: where, who found it, how it was made safe (removed, closed off), the target date, and the repair with who did it. A hazard open past its target shows under Needs you.

Step 22 Inspections and orders

Inspections and orders: each visit by a program adviser, public health or the fire department, its report, outcome and what was cited, and Log an inspection.

"Log an inspection" records where, who inspected, the type of visit, the date, the report (a PDF or a photo), the outcome, the notes, when the report was received and when a copy was sent. "Cited and not yet corrected" lists what an order or report cited until "Corrected today" records the correction; a licensing inspection's findings become the starting point of the next Inspection day. The licence itself, its renewal and its expiry are on Licensing readiness and the calendar.

Step 23 Fire and safety

Fire and safety: the place of shelter, each test of the alarm and the equipment with its interval, the last one and the next due, and Record a test.

A written record of all tests of the fire alarm system and of the fire protection equipment, kept at least 12 months (s. 68(1)(e)), and a designated place of shelter for an evacuation (s. 68(1)(f)). The tests and their intervals follow the Fire Code (monthly extinguisher and emergency lighting checks, the yearly duration test, the alarm's annual inspection); "Set the interval…" sets each, and "Record the correction" closes a deficiency found. The fire chief's approval of the fire procedure is evidence on Licensing readiness.

Step 24 The allergy list

The allergy list: the current version with each child's allergies and restrictions, where copies are posted, and Print the list.

A list of the children with allergies or food restrictions, with their allergens or restrictions, must be posted in each cooking and serving area and in each play area or play room (O. Reg. 137/15, s. 43(3)); the anaphylaxis policy adds a communication plan for life-threatening allergies and an individualized plan for each child with an anaphylactic allergy (s. 39). The list comes from the children's files and changes whenever a file does. KeepCount keeps each version with its reason; "Print the list" records the places the copies go (each room, the kitchen, other places), and "Copies are up" confirms the posting, so the binder shows the version posted and when.

Step 25 Training

Add training: the title, the content (a video, a file, a link or text), who it is for, whether it is required and the days to complete.

The staff training and development policy (O. Reg. 137/15, s. 58(1)) and, from January 1, 2027, training on each required policy (s. 58(1.1)). A training item is a YouTube video (an unlisted link), a file, a web link, text written here, or questions only; "Audience" and "Within it" say who gets it; "Required" counts it toward completion on the person's record and the To do, with its days to complete; "Ministry training this item answers" ties it to the requirement it satisfies. "Answers to review" collects the written answers staff send.

Step 26 The calendar

The calendar: closures and holidays, drills and safety tests, renewals and due dates, by month; Add an event and Print this month.

The calendar draws the dates KeepCount already knows (drills due, tests due, documents and the licence expiring, closures) beside the events you add (a closure, a professional development day, a parent event). "Print this month" posts it; with Families on, families see the events marked for them.

Step 27 Records over a period

Records over a period: a kind of record, a room or a child, from and to, up to three months at once, printed or exported for an inspector.

Every record the regulation requires is kept for at least three years from the date it was made, unless the regulation specifies otherwise (fire drill records 12 months, s. 68; a child's records three years from discharge, s. 72(5)), and is available to an inspector or program adviser at all times (s. 82(1)); a child's records, attendance included, for three years after the child leaves (s. 72(5)). This page answers "show me the sleep checks for September": choose the record, the room or child and the dates; "Print" and "Export CSV" are logged with who made them. With head counts chosen for a week or a month (31 days at most), "Ratios by day" draws a small chart for each room: each day's busiest count, the staff counted then and the staff the ratio required, with a day short of staff marked "Short"; "This week" is a quick period, and the same figures are under "As a table".

Step 28 Who else administers

Logins and access: an administrator adds supervisors and office staff. Owners decide who is an owner or an administrator and who handles billing.

"Add a login" offers supervisor (one or more sites, their rooms, children, records and readiness) and office staff (people and screening documents at their sites, no children's health information). An owner's or administrator's access is changed only by an owner, and the owner chooses who handles billing and who receives KeepCount's update emails. Room staff and volunteers are added from Staff.

Step 29 Help and the tour

Help has this guide, the regulation guides, the glossary, the staff portal preview, who to ask, and "Restart the tour" for the eleven admin screens.

Help also has your first day and first week (this guide, with its printable copy), the guides to the regulation and the glossary. With Families on, Getting started also links the families' guide, to send to a parent or guardian you add to a child's file. "Who to ask" names your office's address for anything about your account and the centre, and KeepCount support (hello@keepcount.ca) for the system itself; a person answers within two business days. "Report a problem" sends what you saw and the screen to KeepCount support only, with this version: say what you did and what you saw, without a child's name or health details. What's new appears there when a release has notes for you; reading them takes the item off your To do. "Preview the staff portal" shows what staff see, with nothing recorded.

"Where do I…?" at the top of Help, and "Go to…" at the top of every screen (in Menu on a phone; Ctrl K, or ⌘K on a Mac), find the step of this guide for a few words such as "sign out" or "fire drill", with "Take me there" and 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; for a person, a home or a child, "Find a file on Inspection day" above it finds their file. Where your organization's owner has turned on "Ask the assistant" (it is off until then), a button under the box answers what you typed from your own guide, with the steps it used and "Take me there". Pressing it sends what you typed to Anthropic, outside Canada, and KeepCount does not keep it: leave out names and anything about a child or a family.

Eleven steps: the readiness score, Needs you, Staff, Policies and quizzes, Licensing readiness, Rooms, Drills, Incidents, the inspection binder, Settings and Help. Each step moves to its screen and marks the menu item. "Skip for now" brings it back next time; "Don't show again" keeps it off until you restart it from Help.

The screens are from KeepCount 0.99.162, captured on October 29, 2026. Your centre'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.