KeepCount
Getting started

Office staff at a licensed child care centre

KeepCount guide for 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 0.99.162, 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.

An administrator invites you as office staff for your site. The link opens "Choose a password"; type it twice and tap "Save and continue". You land on the dashboard. Your menu is short on purpose: Dashboard, Messages, then Staff, Approvals and screening, Checks today, Rooms and the Calendar, then My training and My account. The site's name sits in the top bar.

What office staff do in KeepCount: the people of the site and their screening documents, their invitations and reminders, and messages to the site. What office staff never do: record in the rooms, in children's files, incidents, drills, the logs or the binder, and never see children's health information. 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. 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 for your site: the figures, Needs you with the screening that waits on you, the readiness score, recent activity and the staff 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.

Your Needs you list shows the people's items only: 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 person. "Remind everyone overdue (n)" sends each person with something overdue one reminder email, not again within 20 hours. "Staff in progress" lists who is still working through their policies, quizzes and training.

Step 3 Staff

Staff lists each person at the site with what needs attention, their 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 first: 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. Search by name, email or city; filter by what needs attention or by status. "Add staff member" and "Invite a list" add people; a row opens the record.

Step 4 A person who needs attention

Open the person: the callout says what is missing or due, with a link to the documents; 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; the callout lists each gap with its section.

A person whose main site is another site is managed there ("kept at their main site"); an owner's or an administrator's record is not yours to change.

Step 5 The screening dates

Record & screening: the vulnerable sector check, the last offence declaration, the first aid expiry and notes; "Record a newer date" for a paper document.

The dates are what the readiness list and the reminders read: the vulnerable sector check's date sets the fifth anniversary and the offence declarations between; the first aid expiry sets its reminder. Verifying a document (next steps) fills these dates from it; the form is for a date you know from paper. Internal notes are read by administrators and supervisors, never by the person.

Some documents stay on paper in the office (a college register check, a fire duties briefing): record their dates here and they count as on file. "Record the date" is for the first one, "Record a newer date" for a renewal. The record keeps who recorded it and when.

Step 6 A document awaiting verification

A document someone uploaded waits for verification: "Waiting to be verified", with Open and Verify. The one on file counts until then.

Each document has a status: Not on file, Awaiting verification, Current, Expiring soon, Expired. A person uploads their own document from My details; the office opens it, checks it against the original, and verifies it. A document you uploaded yourself is verified by someone else ("You uploaded it: another administrator opens and verifies it"), so no one clears a file alone. "Open" shows the file through a link that lasts ten minutes; every opening is logged.

Step 7 Verify it

"Verify": the dates and reminders update, and a vulnerable sector check within its six-month limit clears "supervised only" (s. 59(2)(b)).

Verifying is the office's signature that the document was seen: the date issued and the expiry go on the record, Needs you and Licensing readiness change on their own, and the person's "Cleared" column follows. A verified vulnerable sector check clears the supervised-only restriction when it was prepared no more than six months before it was obtained (s. 59(2)(b)). Your 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 person, and every opening is logged.

Step 8 Cleared to work, and to count

"Cleared to work and to count in ratio" says what is still needed before working with children and before counting, computed from the verified documents.

Two lists: before working with children (the vulnerable sector check, the offence declaration in a year between checks, the health assessment) and before counting in the ratio (standard first aid with infant and child CPR). "Staff file details…" opens the whole file. The Ministry decides compliance; the panel shows the state of the documents on file.

Step 9 Add a staff member

"Add staff member": a room staff member, a volunteer or a student at your site. Their invitation goes out when you save.

Name, email, type (employee, volunteer, student, other), position, site, phone, address, start date and remarks. Office staff invite staff, volunteers and students for their own site; an organization administrator adds supervisors, office staff and administrators. The invitation is one 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".

Step 10 Reminders and the record

On a record: Send reminder, Print record, Edit details, Change sign-in email, Deactivate, Remove access.

"Send reminder" emails the person the policies to confirm, quizzes and training still outstanding. "Print record" prints the person's file for the binder, with who printed it. "Edit details" changes their contact details, start date and remarks; "Change sign-in email…" changes the address they sign in with, confirmed from both addresses. "Remove access" ends a person's access when they leave: they can no longer sign in, their phone number and address are removed, and their name, acknowledgements, quiz results, training, screening and documents stay on file for the retention period (three years) and show in a licensing visit. "Deactivate" only pauses a sign-in, and "Reactivate" lets the person back in.

Step 11 Approvals and screening

Approvals and screening: the director's approvals, the animals' rabies certificates and the outside service providers' declarations, as you read them.

The page keeps the director's approvals the adviser asks to see, the rabies certificate of every dog, cat or ferret kept on the premises (O. Reg. 137/15, s. 41), and the screening declarations of outside service providers who work with children at the centre. Office staff read it; a supervisor or an administrator records on it.

Step 12 Rooms, as you see them

Rooms shows what each room has recorded today. Recording is for the room staff and supervisors.

The room cards show the last head count and its verdict, who is in (first name and initial), the daily checks and the sleep checks, read-only. The "Not cleared yet" line names the people not cleared; the reasons are on their records. Children's allergies, plans and pick-up notes are never shown at your access level. "Print sheets" prints the room's paper sign-in sheet.

Step 13 Checks today

Checks today, read-only: every check due that day, from the records, so you can see what is late before it is asked about.

Each cell is a check: head counts, sleep checks, opening, playground, sleep monitors, sanitizing and closing, per room, shown as done, coming up or overdue. A supervisor explains and signs off a missed check; you see the board.

Step 14 Write to the site

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

"Write a message" asks who it reaches and shows how many; the subject and the message; and whether to take replies. No child's health details go in a message: a message is kept with the organization's records for its retention period. The thread shows who has read it.

Step 15 The calendar

The calendar, read-only: closures and holidays, drills and tests, renewals and due dates, by month.

The calendar draws the dates KeepCount already knows (documents and the licence expiring, drills and tests due, closures) beside the events the administrators add. "Print this month" posts it.

Step 16 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, press "I have read it: confirm", 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 17 The pages that keep the daily records

A page that keeps the daily records says it is for owners, administrators and supervisors: they record there and can tell you what you need.

The card reads: "Office staff work with people and their screening documents (Staff, Approvals and screening). A supervisor or an administrator can tell you what you need from here." Children's files, the daily log, incidents, drills, readiness, the binder, medication and the allergy list are theirs. The database refuses the same records to office staff, whatever the screen.

Step 18 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 19 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 (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. 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.

"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, never to your centre: say what you did and what you saw, without anyone's record.

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.