KeepCount
Getting started

The owner of a licensed child care centre

KeepCount guide for owners: 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 the email that followed your demo, choose a password, and sign in with your email and that password.

Sign-up makes your organization with one site, a full draft of each policy the regulation requires (kept current as the regulation changes), and your own login as its owner. The link opens "Choose a password"; type it twice and tap "Save and continue". You land on the dashboard, and a short tour starts the first time; you can skip it and take it again from Help.

A bar at the top reads "Trial: 30 days left · Plan and billing" for the length of the trial. Nothing is charged automatically, and KeepCount takes no card: KeepCount Inc. invoices the plan, and to start it you write to hello@keepcount.ca and KeepCount support moves the account to the paid plan. When a trial ends before that, the records stay and everyone can sign in, view and export; nothing can be added or changed until KeepCount support moves the account to the paid plan.

The owner's login can do everything: billing, every site, and who else is an owner or an administrator. Give the day-to-day work to the people who do it (the last step) rather than sharing this login.

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 on the first day

The dashboard says what to do next. Licensing readiness fills in from your records as you go; the set-up guide leads until the set-up is done.

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.

On the first day the readiness card shows the set-up (policies 0 of 16 approved, screening 0 of 1 entered) and the score fills in from your records as you go; the set-up guide shows what to do next, step by step. "Needs you" already lists what the regulation asks of you personally: your own vulnerable sector check, your fire duties briefing, your health assessment. The four figures at the top (rooms in ratio at the last count, children signed in now, due or late now, incidents open) fill in once the rooms are in use.

A footnote counts the requirements with nothing recorded yet; they fill in as you work through the set-up guide, and every one of them is on Licensing readiness.

Step 3 A few questions first

Open "Set up KeepCount" in the menu and answer the questions about your centre: about five minutes, and the readiness list follows your answers.

The questions decide which requirements apply to you, so the readiness list is yours and not the whole regulation. In order: which licensed age groups your sites serve; whether children sleep in a separate sleep room; whether electronic sleep monitors are used; whether any site is in a school; whether dogs, cats or ferrets are kept on the premises; where children play outdoors (at the centre, elsewhere with a director's approval, or nowhere because every program runs under six hours a day); how meals are provided; whether volunteers or students on placement work with the children; whether the centre is enrolled in CWELCC; which daily checks each site records in KeepCount (opening, playground before outdoor play, sanitizing, closing); and where attendance is recorded (the room tablet, or another app, whose export is imported).

Tap "Save the answers". You can change them any time ("Change the answers"); a changed answer changes the list.

Step 4 The ten steps

Below the questions, the ten steps in order, each with what it needs, about how long it takes, and a button to the screen. Done means the records exist.

The steps: your organization's details and logo; sites (name, licence, capacity and operating days); rooms and their age groups; your staff; screening dates; review your policies; the children register; drills of the last 12 months; inspections and approvals on file; invite your staff. Each shows "n of n complete" from the records themselves. "Use a spreadsheet" on rooms, staff, screening, children and drills imports a list from the template; "Move from another app" brings children, contacts and attendance from your current app's exports; "Bring in your own policies" takes a centre's existing policy documents.

The guide stays in the menu with its count until you take it out ("Take the guide out of the menu"); it comes back with "Put it back in the menu" on the same page, and the dashboard's set-up card points at the next step meanwhile.

Step 5 Your organization's details

In Settings, check the name, add the contact email staff see, your tagline and your logo, then "Save organization".

The name and contact email go on the inspection binder and every email KeepCount sends for you. The logo and colours go on the sign-in page and the top bar; KeepCount checks every colour pair for contrast, so very light or very bright picks are deepened on their own. The short name goes on the top bar.

The licensee is responsible for the operation and management of each centre, including its program, financial and personnel administration (O. Reg. 137/15, s. 6(1)); these details are the first thing a program adviser reads in the binder.

Step 6 The site: licence, capacity, days

On Sites & rooms, "Edit" the site: its name as on the licence, the licence number, capacity and expiry, the supervisor, the hours and operating days.

Give each site its name as on its licence (a site set up at sign-up is called "… site 2" and so on until you rename it) and add its licence number, licensed capacity and licence expiry, which print in the binder; its operating days decide which days need a full day of records. The hours set when the opening check is due, when a child is "expected and not here", and when the closing check is due.

The site dialog also holds what the policies need: whether the site is in a school and its term dates, the outdoor play space and how it was measured (s. 24(1): 5.6 square metres a child for a program of six hours or more), safe arrival and medication settings, and the first day open. Every centre must employ a supervisor who plans and directs the program, is in charge of the children and oversees the staff (s. 6(4)); name them here once they have a login.

Step 7 Add the rooms

"Add room" for each licensed room: its name, its licensed age group and its licensed capacity. The ratio and group size follow from the age group.

The licensed age groups are Schedule 1's (infant, toddler, preschool, kindergarten, primary/junior school age, junior school age) and the family age group of Schedule 4. For every licensed age group the ratio of employees to children, the maximum group size and the proportion of qualified employees set out in Schedule 1 must be kept, on the premises and on outings (s. 8(1); a licensed family age group follows s. 8.1 instead); a head count in that room is judged against them. A mixed-age group approved by a director is marked here, so s. 8(3)'s rules apply to its counts.

"In use" takes a room out of the day's checks without deleting it. The order sets how rooms are listed on the tablet.

Step 8 Add your staff

On Staff, "Add staff member": name, email, type, position and site. Saving sends the invitation; the person chooses a password from its link.

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.

Type decides what the person may do: an employee counts in the ratio once cleared; a volunteer or a student on placement is supervised by an employee at all times and is never alone with a child (s. 11.1(1)); KeepCount's own rule is that they never count in the ratio. Position is free text ("RECE", "Assistant", "Cook") and shows on the person's record and on the tablet. "Invite a list" adds several people at once, one per line.

In a demonstration no email leaves KeepCount: the button reads "Add without an email" and a one-time link opens KeepCount as that person instead.

Step 9 Screening dates

On a person's record, "Record & screening": the vulnerable sector check, the last offence declaration and the first aid expiry. Save once; renewals follow.

A vulnerable sector check from every employee before they begin, and from every volunteer or student before they interact with children (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 the supervisor and every employee who may be counted in the ratio (s. 58(2)); a health assessment and immunization before employment, as the local medical officer of health directs (s. 57(1)). KeepCount keeps each date, works out the next due date and reminds the person and you before it lapses.

The Documents tab is where the documents themselves are uploaded or recorded as "date only", verified by you, and where "Cleared to work and to count in ratio" shows what is still missing. Until a person is cleared, the room's tablet says so beside their name. Your screening policies must say how checks and declarations are obtained and kept confidential, and what measures protect the children while a check is outstanding (s. 65).

Step 10 People in each room

On Sites & rooms, "People" on a room: tick who works in it and whose main room it is. That is what "My rooms" shows each person.

A person's usual room, by weekday, is what the tablet opens for them and what their Due now list follows. They can choose another room for a day, or cover one with a reason; the record keeps who was in the room and why. The same assignment is on each person's record under "Rooms", with the weekdays.

Step 11 The policies, as drafts

Policies & quizzes holds a full draft of each policy the regulation requires, with its quiz. Read each, write the parts marked for your centre, and approve it.

A full draft of each policy the regulation requires, with quiz questions, kept current as the regulation changes, beside your own. Write the parts marked for your program and approve each one; staff see it once approved. A new version asks everyone to confirm again; the annual review starts a new cycle without changing the text.

The callout counts the drafts to review: "KeepCount's library writes each required policy in full. Open each one, write the parts marked in yellow, check the Preview, then approve it. Staff see a policy once it is approved; nothing reaches them before." "Approve several…" approves a batch once their parts are written; "Change the order…" sets the order staff see; "Bring in your own policies" takes your existing documents; "Add policy" writes one of your own.

Every licensee must have the written policies the regulation names and implement them at each centre (s. 6.1(1)), with a written way of monitoring compliance and recording contraventions (s. 6.1(7)). From January 1, 2027, where a policy gives the supervisor powers or duties it must name who exercises them when the supervisor is not on site and an urgent situation needs someone on site to act at once (s. 6.1(2), added by O. Reg. 197/26).

Step 12 A draft, part by part

Open a draft: the text with the parts to write marked, the required elements, the quiz and the history. "Approve…" once it describes your centre.

The draft's callout lists what it still needs before approval: the parts of the text still to be written (marked "fill"), and sometimes a record elsewhere, such as who acts in place of the supervisor or the site's supervisor. "How this required policy is met" offers three ways: KeepCount's text, edited for your centre; your own document, uploaded, with KeepCount's text cleared; or both, your document attached to the text. The Preview shows the policy as staff will read it, with the parts to write in yellow. "Required elements" lists what the section asks the policy to cover and where each is met; "Quiz questions" are the policy's own, which you may edit.

Step 13 Approve it

"Approve…": confirm "I have reviewed this policy, and it describes how the centre works", choose now or a date, set the days staff have to confirm, and approve.

Approval records who approved the policy and when, and the version; staff see it from that moment with its due date. The days to complete are the window before a confirmation shows as overdue on each person's record and under Needs you; the demonstration gives new staff 30 days. A policy approved "on a date" waits until then. The program statement must be reviewed at least annually (s. 46(1)); "Annual review…" on the list starts that cycle for every policy without changing their text.

Step 14 The children register

On Children, "Add child": name, date of birth, site and room, first day. The children's names are encrypted; only your staff see them, in their rooms.

A child's record holds what s. 72(1) requires: the signed enrolment application, the parents' names, home addresses and phone numbers, the health and immunization information, medication instructions, and the people who may pick the child up (emergency contacts are KeepCount's own field), with daily attendance showing arrival and departure times or an absence (s. 72(3)). "Use a spreadsheet" on the set-up guide imports the register from the template; "Move from another app" brings children, contacts and attendance from your current app's exports in one move.

The individualized plan checkbox marks a child with a plan on file (anaphylaxis, s. 39; medical needs, s. 39.1); its review date goes on the file. "Pick-up notes" are what the room sees at sign-out. Children's health information is read only by the people who work with the child; office staff never see it.

Step 15 Who may pick up

In the child's file, "Family and pick-up", "Add a parent or guardian": name, relationship, phone and the day their photo ID was checked.

Your centre's safe arrival and dismissal policy provides that a child may only be released to the individuals the parent has specified (O. Reg. 137/15, s. 50(a)(i)), or, for a child who leaves on their own, as the parent has permitted in writing for a set time (s. 50(a)(ii)). The list here is what the tablet shows at sign-out as buttons; a name not on it makes the tablet ask whether a parent approved the person, in writing or by phone, or stops the release and sends the staff member to the office. "Not to be released to" records the people a parent has excluded. With Families on, parents who sign in see this list.

Step 16 Invite your staff

The last step: "Send the invitations". Each person gets one email with a link to choose a password; their policies and training are waiting for them.

The invitations go out once the policies are approved, so each person signs in to a list of things to do and not to an empty screen. The set-up page counts the people added without an invitation and sends them in one go; a person's record has "Resend invite" for a link that expired. Everyone gets the same first screen: their home page with "Your checklist" (read and confirm each policy, pass each quiz, complete required training), their screening documents and their rooms.

Step 17 Licensing readiness

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

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.

The tiles count the tracked requirements: the score ("1 of 30 tracked requirements met"), overdue (past the required cadence), missing (no record at all yet) and due soon (within the warning window). Chips filter the list: All, Needs attention, Met, Not applicable. The tabs are organization-wide and one per site. Statuses are Met, Due soon, Overdue, Missing, Not applicable and Not tracked yet; a requirement not yet in force ("From Jan 1, 2027: not scored yet") is shown but not scored. "Export CSV" gives the list as a file.

The statuses are based on your records in KeepCount; they are not the whole regulation, and the Ministry decides compliance.

Step 18 Why this matters

Open "Why this matters" under a requirement: what the section asks, what satisfies it here, who is reminded, and what the inspector asks.

Each requirement names its section and quotes it, then says what satisfies it in KeepCount (the record, the date, the person), who is reminded before it lapses, what the binder shows for it, and what a program adviser asks to see. "Read the section" opens e-Laws at the section. The text is checked against the consolidation on e-Laws, with the date, so a changed regulation is caught: the library's rows change by a migration, never by hand.

Step 19 Record evidence

"Record evidence" on an approval or inspection: the date it was checked, its expiry and the document, so the requirement is met from the record.

Approvals and inspections live outside KeepCount (the fire chief's approval of the fire procedure, the playground's annual inspection, the public health inspection, the licence itself); the evidence record is their date, their expiry and a copy of the document (the playground's annual inspection takes who inspected, the date on the inspector's report, the report and whether it found anything to fix instead of an expiry: it falls due a year after the inspection, and each hazard found goes into the Playground repair log). "Add record" keeps the history, so last year's inspection stays beside this year's. A requirement whose record has expired shows Overdue; one with a record coming due shows Due soon; "Not applicable…" takes a requirement off the list with your reason, which prints in the binder.

The fire procedure approved by the local fire chief, each staff member instructed before their first day, the procedure posted in every room used for children, monthly fire drills and a written record of every drill and test kept at least 12 months (O. Reg. 137/15, s. 68(1) and (2)); daily, monthly and annual playground inspections as the CSA standard sets out (s. 24(5)(b)); and an insurance policy in full force with general liability and personal injury coverage (s. 71).

Step 20 Record a drill

On Drills, "Record a drill": the site, the kind of drill, date, time and duration, who led it, who was present, everyone accounted for, and any issue found.

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, with a written record of every drill and every test of the alarm and of the fire protection equipment, kept at least 12 months (s. 68(1)(e) and (2)); a centre in a school serving only the school board's pupils holds total evacuation drills by term instead. From January 1, 2027, a missing-child drill at least once every three months with the record kept at least 12 months (s. 68.2(3), added by O. Reg. 197/26). The page shows the last 12 months by site, so a month without a drill is visible before an inspector sees it.

Step 21 Rooms, as you see them

Rooms shows today's state of every room: the last head count and its verdict, who is signed in, the daily checks and the sleep checks.

The room tablet: head counts with the Schedule 1 verdict before saving, the daily checks and sleep checks per child. Staff use it on their phones or a tablet in the room; you see today's state per room.

As the owner you cover a room the same way staff do, with the reason, and what you record is marked as yours. "Print sheets" prints the day's paper sheets for a room without a connection; "Review the day" opens the close-out; "This tablet" turns the device into a shared room tablet with a PIN per person.

Step 22 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: tap it to record it, or, once it is missed, "Record what happened" to explain it. A missed check explained and signed off by a supervisor is counted by the close-out as a miss with a reason, which the binder shows honestly; a gap with no explanation stays a gap. The legend reads done, recorded late, due, overdue, missed with an explanation, and missed, explained and signed off.

Step 23 Report an incident

Any incident affecting a child's or a staff member's health, safety or well-being goes in the daily record. A serious occurrence adds the Ministry steps.

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 (s. 37(1)); for a child's incident a parent is notified unless already told of it under s. 36 (s. 37(2)). A serious occurrence (the death of a child; abuse, neglect or an allegation of either; a life-threatening injury or illness; a child missing or temporarily unsupervised; an unplanned disruption of normal operations that poses a risk to children, s. 1) is reported to an inspector or program adviser within 24 hours of the licensee or supervisor becoming aware of it (s. 38(1)(b)), through the Child Care Licensing System (CCLS). The form's "Ministry reporting" card keeps when you became aware, when it was reported, the CCLS reference, and the dates the summary was posted and taken down; the Incidents page counts serious occurrences not yet reported. 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.

An injury also needs an accident report with a copy to a parent (s. 36(4)); the form prints it and records when it was given.

Step 24 The inspection binder

The binder is the visit in one document: cover, contents, the score, the Licensing Manual's parts in its order with the evidence, and a licensee review.

"Print this part", on each part's line, prints that part alone with the cover's lines (the period, when and by whom it was printed), when the program advisor asks for one part.

One click prints the binder for the visit: cover, contents, readiness, people and screening, policies and sign-offs, drills, daily logs, incidents, and a sign-off block. On screen each part is one line, with what is to act on and Open; "Open every part" opens them all. The printout, the signed copy and the visit pack keep every part whole, with the contents.

Choose the period (last 30 days, 90 days or 12 months). Every record the regulation requires must be kept in a secure place 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 be available to an inspector or program adviser at all times (O. Reg. 137/15, s. 82(1)); the binder is how KeepCount shows them in the order the Licensing Manual's parts use, with each requirement's status and evidence. Printing is logged with who printed it. "Download the visit pack" gives the binder with every document behind it as files.

Step 25 Inspection day

On the day, Inspection day: who is visiting, the records by Manual part, what changed since the last visit, the questions an adviser asks, and "Log this visit".

"Who's visiting today?" chooses the Ministry, public health or the fire department, and the page shows that visitor's records. "By Manual part" follows the Licensing Manual; "Since the last visit" lists what changed; "During the visit", where the page opens, has Find a file (a child's file or a person's record by name), what to do when the adviser asks for something KeepCount does not keep, and the questions program advisers ask with where the answer is ("Find a question" above them takes words or a section, such as 68). "Walk the postings" is the checklist of what must be posted at the site; "Log this visit" records the visit and its findings, so the next visit starts from them.

Step 26 See what staff see

From Help, "Preview the staff member portal": the portal as one person sees it. Nothing can be recorded in the preview.

The preview opens the staff portal as a chosen person: their home page with "Your checklist", their screening documents, their rooms and their policies, with the menu they get. It is the quickest way to see what a new staff member meets on their first sign-in, and to check a policy reads well on a phone. "Exit preview" returns to the dashboard.

Step 27 Who else administers

On Logins and access, "Add a login" for the people who run the centre with you: owner, administrator, supervisor of a site, or office staff.

The access levels: an owner does everything, including billing and deciding who is an owner or an administrator; an administrator runs the organization (billing only when an owner allows it); a supervisor runs one or more sites, their rooms, children, records and readiness; office staff handle people and screening documents at their sites, see rooms and records, and never see children's health information. Room staff and volunteers are added from Staff, not here. "Change access" on a row moves a person between levels; only an owner can make or remove an owner or an administrator, and KeepCount keeps at least one active owner.

A person who already administers another organization with KeepCount can be given this one under the same sign-in; they then switch between organizations in the top bar.

Step 28 Settings, tab by tab

Settings tabs, each with its own Save: Organization, People and screening, Policies and training, Daily operations, Reminders and emails, Your data, Advanced.

Short tabs, each with its own Save: your organization's details and branding, screening documents, policies and training, daily operations, reminders, your data. Plan and billing has its own page.

Under Organization, "Features" is where an owner turns on what the organization uses: Family billing, Staff clock-in and, for an agency, Provider pay. Each says what it does; turning one off hides it from the menus for everyone, what was recorded is kept for its retention period, and turning it on again shows it. Only an owner can change them.

People and screening sets which documents are required of whom and their renewal periods; Policies and training sets the review cycle; Daily operations sets the checks each site records, the head count interval, the sleep check interval and the close-out; Families appears once the module is on; Reminders and emails sets who is reminded of what and when; Your data holds the export of everything, the import from your previous app and the retention period (three years at least); Advanced holds the rarely changed settings, and "Ask the assistant (AI help)": it is off until you turn it on (only an owner can, and only once KeepCount's privacy notice describes it), and then everyone in the organization can use it from Help. Plan and billing, a separate page, shows the trial, the plan and the invoices; starting the paid plan is arranged with KeepCount support.

Step 29 Help and the tour

Help has the guides to the regulation, What's new after each release, the staff portal preview, who to ask, and "Restart the tour" for the eleven admin screens.

"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.

The guides to the regulation, the glossary, how to reach KeepCount, and this tour again whenever you want it.

What's new lists each release's notes once it is out; reading them takes the item off your To do. "Report a problem" sends what you saw and the screen to KeepCount support only, with this version. Your office address under "Who to ask" is the contact email from Settings; staff see it on their own Help page.

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.