Child care licensing portal

Family day home agency user guide for licensing service

Child Care Licensing Portal Licensing Service User Guide | Jobs, Economy and Trade

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Child Care Licensing Portal

What is the Child Care Licensing Portal?

The Child Care Licensing Portal is a system where child care providers and child care licensing staff can interact with one another in a digital environment.

The system has been created to help transition current paper-based forms, interactions, and files, into a newer, online format that makes communication between agencies and child care licensing staff easier, more organized, and more advanced.

The portal allows providers to keep an up-to-date profile on their own program, the people within their program, and the ability to upload documentation that their licensing officer needs to see.

What is the purpose of this guide?

This user guide will provide helpful information for providers on how to access, navigate, and perform all actions within the portal.

Who do I contact if I have questions?

If you have any questions related to the portal, please feel free to reach out to your licensing officer or our licensing system support team at cclicensingsystemsupport@gov.ab.ca

For all other non-technical questions, please contact your associated licensing officer.

Child Care Licensing Portal

What is the Child Care Licensing Portal?

The Child Care Licensing Portal is a system where family day home agencies and childcare licensing staff can interact with one another in a digital environment.

The system has been created to help transition current paper-based forms, interactions, and files, into a newer, online format that makes communication between agencies and child care licensing staff easier, more organized, and more advanced.

The portal allows agencies to keep an up-to-date profile on their own agency, as well as a profile for each of their program educators. Within these profiles, agencies can update key information, complete various activities, and communicate directly with Children's Services childcare licensing staff.

What is the purpose of this guide?

This user guide will provide helpful information for agency staff on how to access, navigate, and perform all actions within the portal.

Who do I contact if I have questions?

If you have any questions related to the portal, please feel free to reach out to your licensing officer or our licensing system support team at cs.licensingsystemsupport@gov.ab.ca

For all other non-technical questions, please contact your associated licensing officer.

Quick links – Training videos

Here is a quick list of all available training videos on the Child Care Licensing Portal.

- Agency profile – Notes & Activities tab
- Program educator profile – Agency-led program review
- Program educator profile – Printable program profile
- Supporting documentation
- Supporting documentation for non-compliances
- Updating children in care information

1.0 Accessing the portal

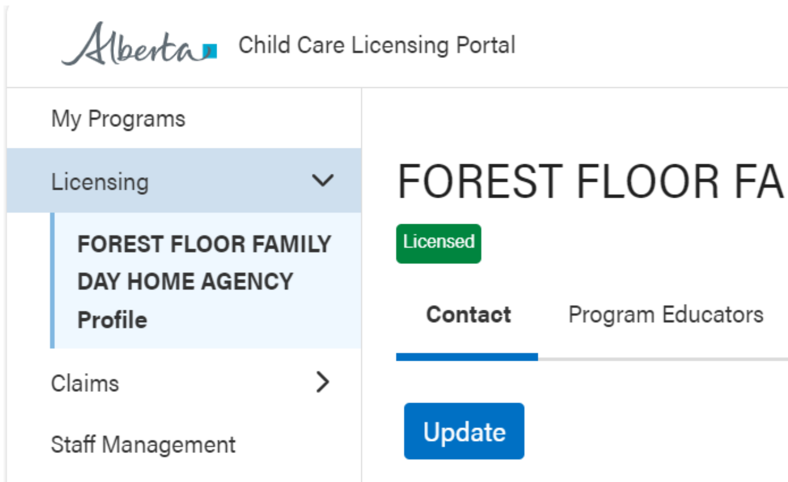
To access the child care licensing portal visit: childcareoperators.alberta.ca

Please use **Google Chrome** to access the site.

If it is your first time accessing the portal, click "Create an Account". Otherwise, click "Sign In" and enter your account credentials.

You will need to login to your Child Care Licensing Account and request **licensing** access to use the features covered in this guide. For information on how to request and receive access, please click here.

The licensing services covered in this guide can be accessed at any time from the Portal by clicking your program's name, under the Licensing header, in the left-hand navigation menu of the site as seen below.



2.0 Agency profile

2.1 – What is an agency profile

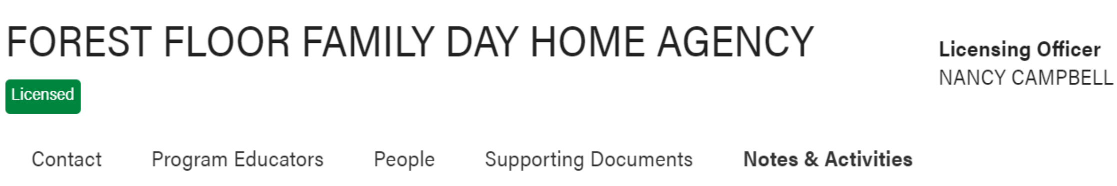
The profile is where you can keep important information about your agency up to date.

This includes contact information, a list of your associated program educators, and an area to record consultations with your licensing officer.

You can access your agency profile by signing in with your child care licensing account.

2.1.1 – Agency profile tabs

The agency profile consists of three areas of information, called tabs. They are the *Contact*, *Program Educators*, *People, Supporting Documents* and *Notes & Activities* tabs. This section of the guide covers how to use each of these tabs.



2.2 – Agency contact

The *Contact* tab contains all your agency's contact information. This is helpful information the licensing team uses to contact various agencies in the province.

The contact information includes the agency name, ID, phone number(s), email, business and mailing address, the agency's regional focus, and a list of individuals who act as agency contacts.

2.2.1 – Business and mailing address

The business and mailing addresses are the same as the addresses used on your agency's licensing application.

In order to change either of these addresses, please contact your licensing officer. This change requires a varied license and an amended contract. Your licensing officer will complete the address change in the system for you.

2.2.2 – Regional focus

The regional focus section highlights which type(s) of region the agency focuses your services on.

The options are **urban**, **rural,** or **both urban and rural.**

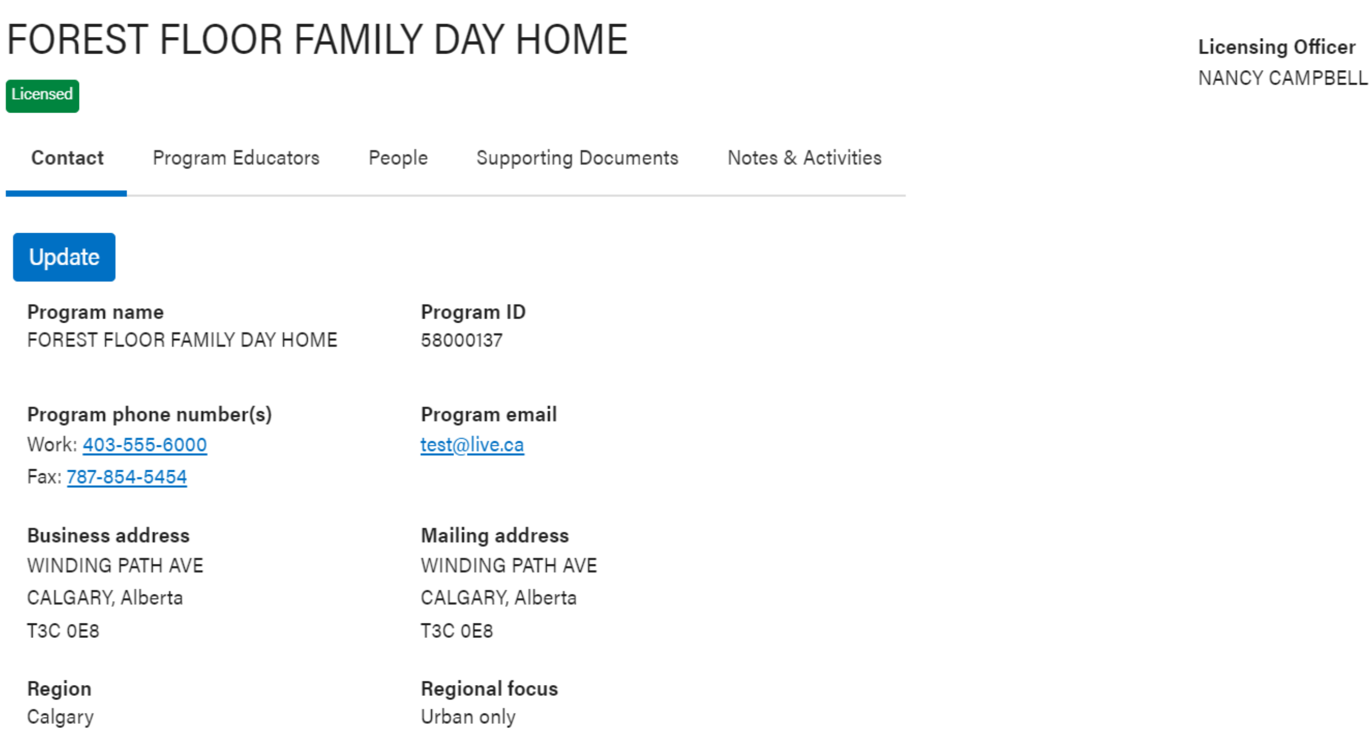
An agency with homes exclusively in cities (Edmonton, Calgary, Red Deer, Lethbridge, Grande Prairie, etc.) is **urban-focused**.

An agency with homes exclusively in small towns, villages, or hamlets is **rural-focused**.

An agency that has homes blended between cities, towns, and other rural areas, is **both urban and rural focused**.

To select your regional focus, click "Update" on the *Contact* tab, and then choose the corresponding option. Click "Save" at the bottom of the page to save the selection.

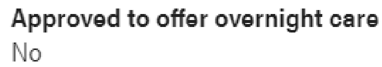
The distinction between whether an agency is **urban**, **rural**, or **both urban and rural**, can be made by either the agency or the Licensing Officer.



2.2.3 – Approved to offer overnight care

If your agency has been approved to offer overnight care, “Yes” will display beneath the “Approved to offer overnight care” section on the *Contact* tab. If your agency has not been approved, “No” will display.

This status is automatically set based on your agency’s current licence.



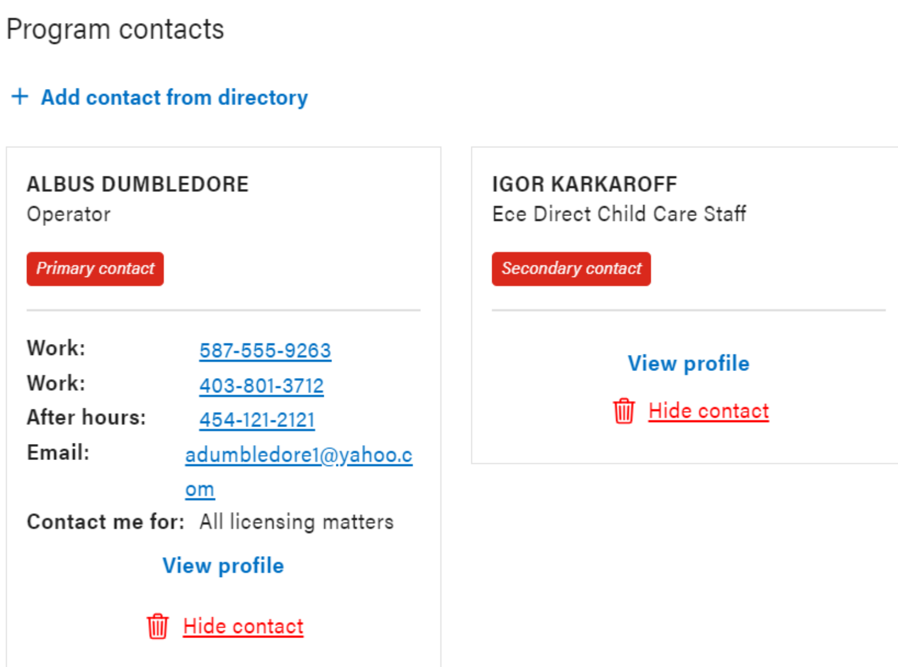
If your agency is approved to offer overnight care, then you will be able to indicate which of your specific program educators are approved to offer overnight care. This information can be updated on the program educator’s profile on the *Program details* tab.

If you would like to update the overnight care setting for your agency, please contact your Licensing Officer, as this will require a variance to your licence.

2.2.4 – Program contacts

This section of the *Contact* tab is where your program can indicate who its designated contacts are. These contacts help the licensing, claims, and funding teams of the Government of Alberta know who to speak to for certain matters. Your program can add as many contacts as necessary.

To add a contact, click “Add contact from directory”. This will bring up a list of the people you have added to the *People* tab. If you do not see the name of someone you would like to add as a program contact



Hiding a contact

To hide a contact from this tab, click “Hide contact” on the person’s contact card. This will not remove the person from the *People* tab. You can permanently remove the person’s profile directly from the *People* tab.

2.2.5 – Licence holders

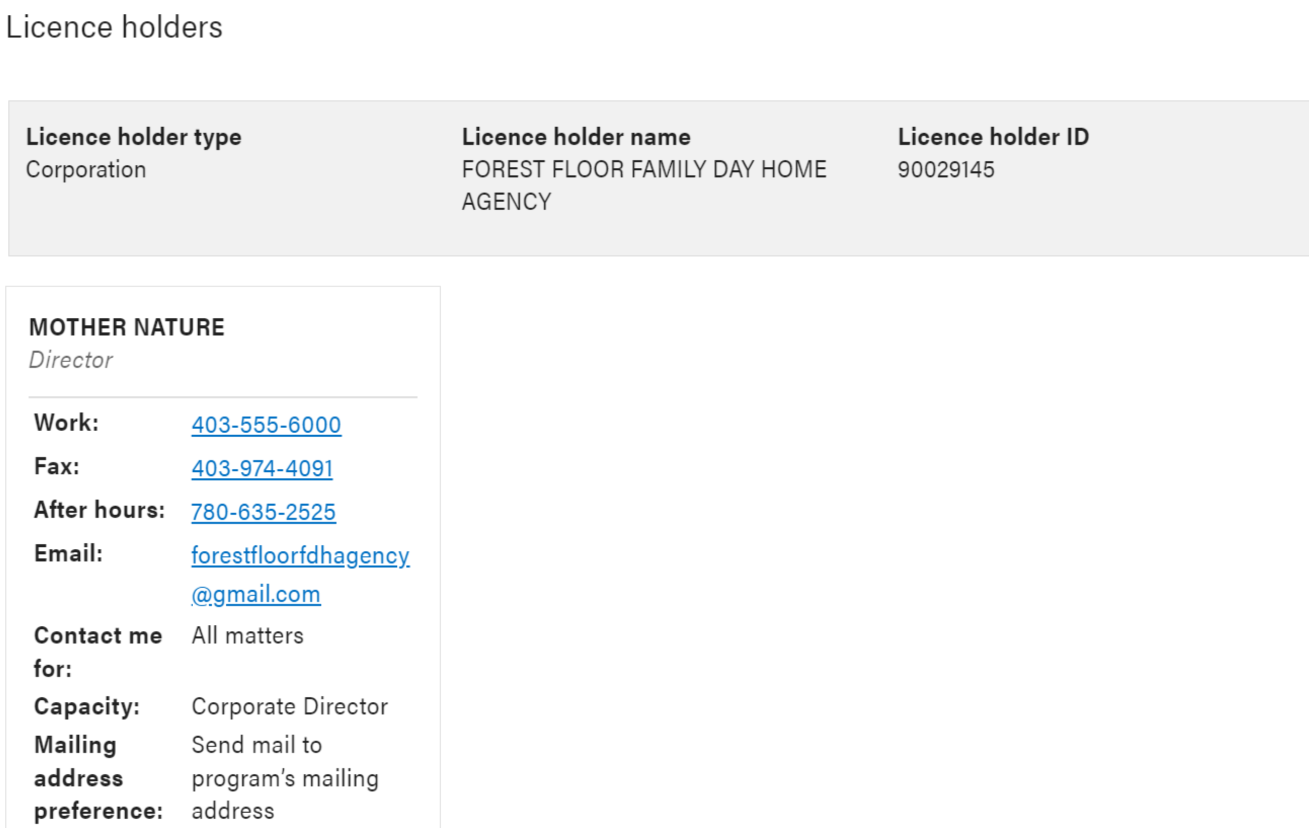
At the bottom of the *Contact* tab is the Licence holders section. This section contains the licence holder information that is on file for your program. It consists of two parts: the non-editable core licence holder information, and the people at your program who have been assigned a role of licence holder on their program profile.

The grey section which contains your program's licence holder type, name, and ID consists of what we have on file for your current licence. This information cannot be edited on this tab. If you would like to request a change to this information, please contact your Licensing Officer.

The second part, which displays contact information for each of your licence holders, is determined by information on a person's profile. **If a person has a role of licence holder – as indicated on the *People* tab and in the person's profile - their contact card will appear in this section.**

You will use the information on the *People* tab to make any edits to this information, including editing an existing licence holder's contact information, adding a new licence holder, or removing an old licence holder. Editing a person's profile is covered in section 3.0 of this guide.

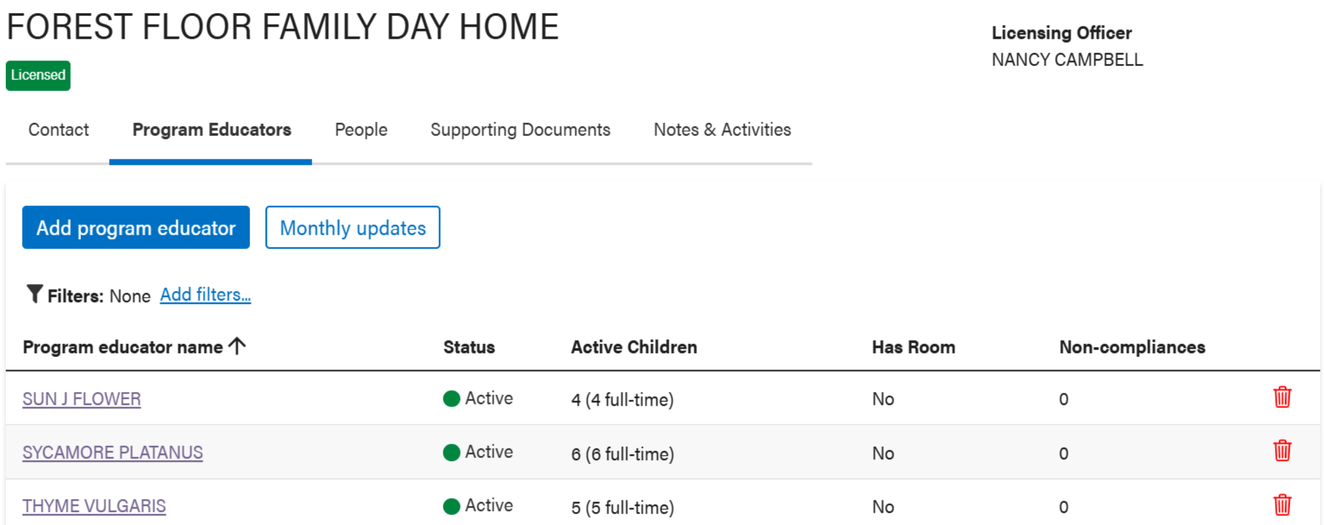
Important note: If you are making any changes to your licence holders, including adding or removing licence holders, please let your licensing officer know. These changes may require updates to your licence, or new documents.



2.3 – Program educators

The *Program educators* tab contains a list of the program educators associated with the agency. As an agency, you will have easy access to track and manage all of your program educator profiles.

From this tab, you can view all of the program educators, access a program educator's profile, add new program educators, remove program educators, and access the monthly updates feature to quickly update fees and children in care details for your educators.

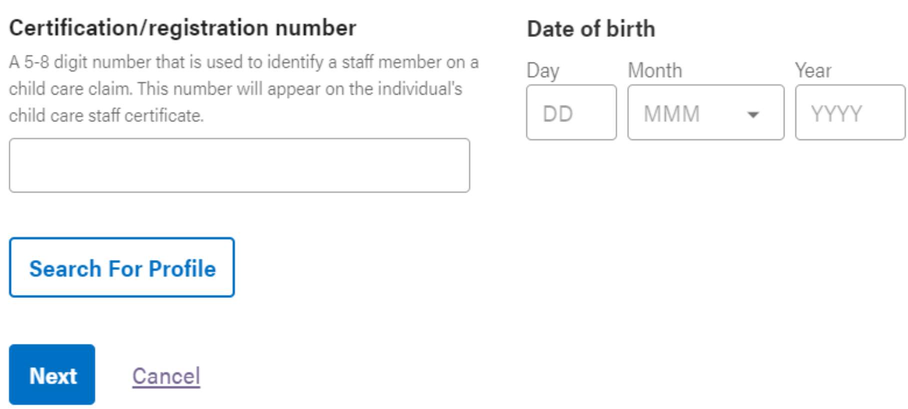


2.3.1 – Adding a program educator

In order to add a new program educator to your agency, click “Add Program Educator” on the *Program educators* tab.

Step 1 – Connect profile

Step 1 of adding a program educator needs you to look up the program educator by their certification/registration number and their date of birth. The certification/registration number is the number used to identify a staff member on a child care claim.



Enter the certification/registration number and the birthdate, then click “Search for profile”. The name of the individual will display below.

If this is the correct individual, click “Next” to proceed to Step 2.

Are you having trouble finding a program educator?

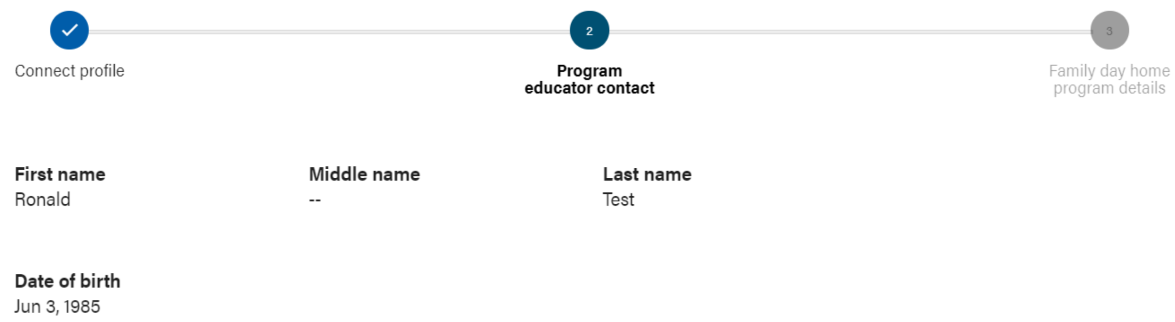
If the program educator does not have a certification/registration number, please encourage them to apply for early childhood educator certification, by visiting https://www.alberta.ca/child-care-staff-certification.aspx.

Additionally, you can email your licensing officer with the educator’s name and date of birth, requesting an ID to be created. An ID will be created and sent back to you.

If you are certain that the educator has a certification/registration number, but cannot find the educator in the system, please email cs.licensingsystemsupport@gov.ab.ca with the name of your agency, the educator’s name and date of birth, and a description of your issue. We will be in touch as soon as we can to assist you.

Step 2 – Contact

Step 2 of adding a program educator requires you to confirm the educator’s contact information.



The educator’s name, date of birth, and certification information cannot be changed as this is directly tied to the educator’s certification profile. If the educator’s name or date of birth is inaccurate, please add the educator and then contact your licensing officer who can assist with getting it updated.

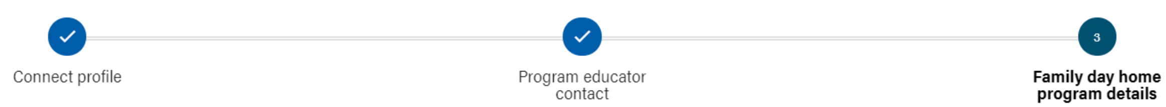
To proceed to Step 3, only the program educator’s name, date of birth, certification information, and address are mandatory.

You can choose to add the program educator’s training, languages spoken, email, additional phone numbers, or emergency contacts now, or add them at a later time.

When you have added/confirmed the information, click “Next”.

Step 3 – Program details

Step 3 allows you to add details about the program, such as hours of operation, the educator’s start date with the agency, the fee structure, and information about the home itself.



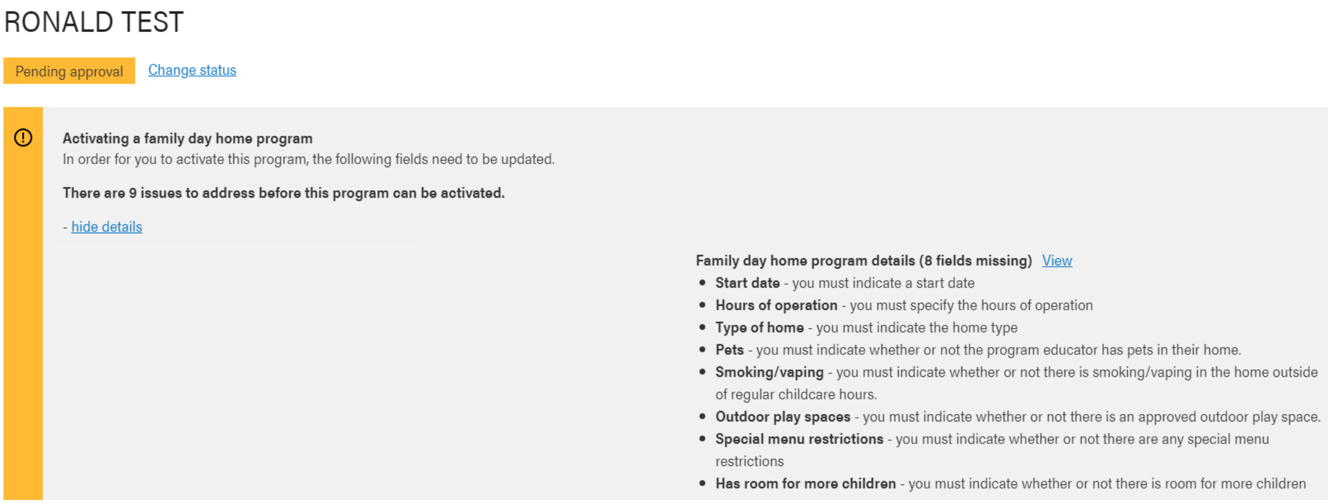
You do not need to fill out any of the information on this step in order to add the educator at this time, but you will need to later on in order to change the educator’s status to **active**.

After entering any desired information, click “Save program educator” to add the program educator to the agency profile.

After adding a program educator

After being added, the program educator will appear on the *Program educators* tab of agency profile with a status of **pending approval.**

If you didn’t enter all of the required information on Steps 2 and 3, an alert will appear at the top of the program educator profile.



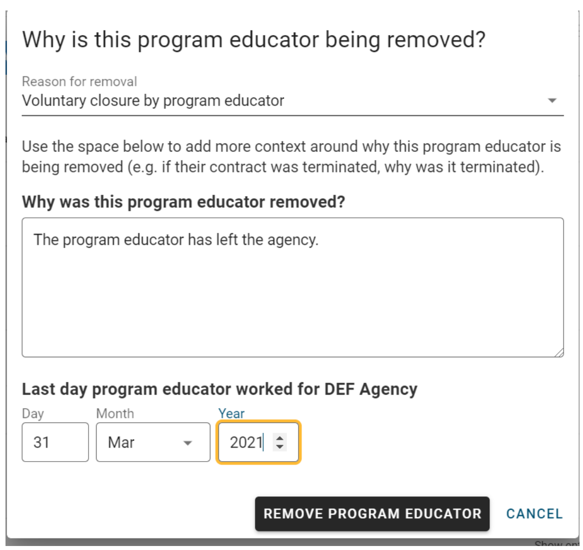
All of the information highlighted in this alert must be filled in before the program educator can be set as **active.**

For instructions on how to update the program educator profile with the necessary information, refer to this section of the guide.

For instructions on how to set the program educator status to **active,** refer to this section of the guide.

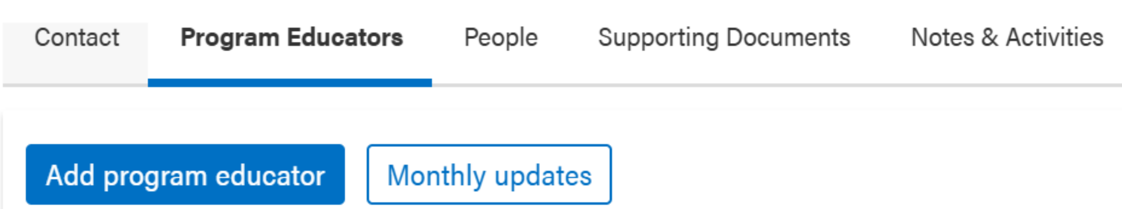
2.3.2 – Removing a program educator

You can remove a program educator that has left your agency by clicking "Remove" on the *Program educators* tab for the applicable program educator. This will bring up a window with additional fields.



After you have selected the reason for removal, indicated additional details about the removal, and added the last day worked by the program educator, click "Remove program educator" to complete the removal.

2.3.3 – Monthly updates



This feature allows you to enter your monthly fees for each educator in a much faster manner, compared to individually going to each program profile and editing the information there.

To begin, click the “Monthly updates” button. A list of your program educators, in alphabetical order, will appear.

This page displays each educator’s name, their status, their monthly fee total, their current children in care, and the date that your agency last updated this information.

2.3.3.1 – Updating monthly fees

On the program educators tab of your agency profile, click the “Monthly updates” button. The monthly updates page will open.

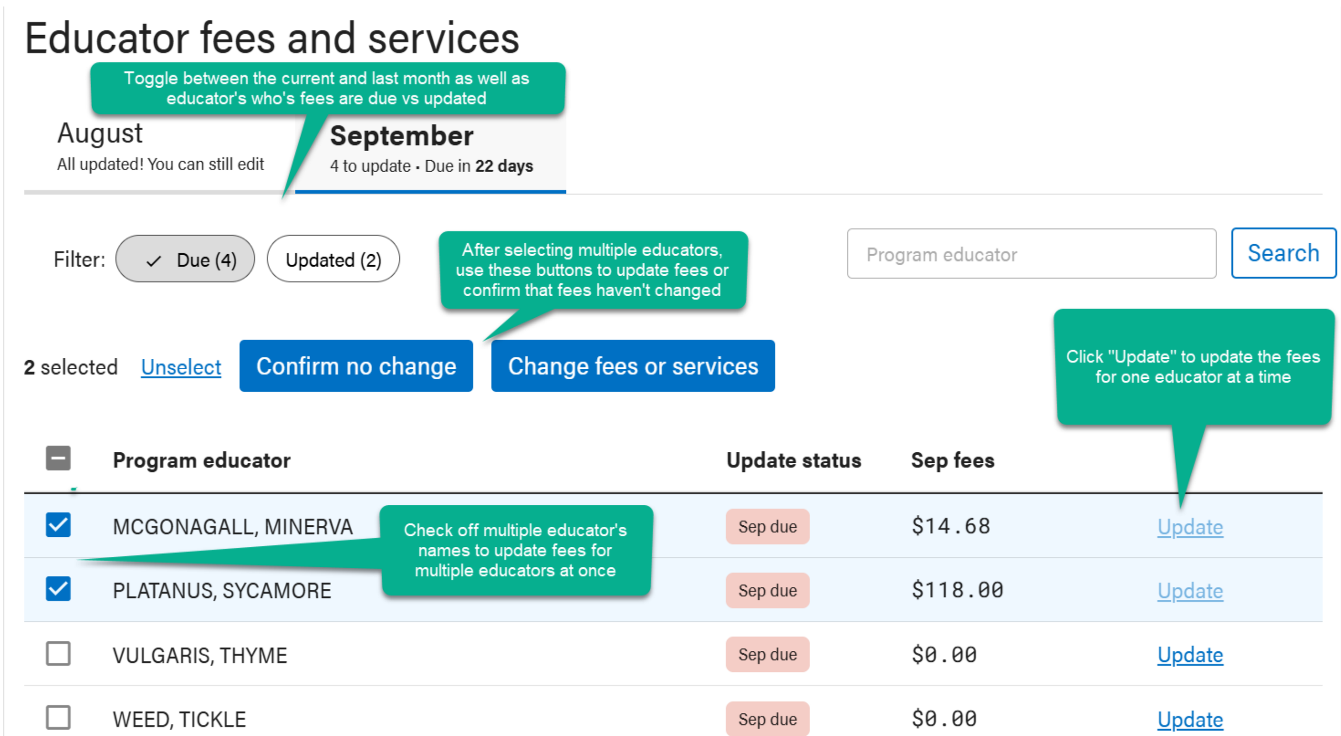
On this page, you can update educator fees without having to go directly into each educator’s profile from the program educators tab.

There are two ways to complete the fee updates on this page: individual educator updates or bulk updates. Both options are detailed below.

The individual educator update is best used when you want to see the fees and services that are applied to an educator, make edits to those fees and services, and then move on to editing the next educator’s data, one at a time. This method is quicker than going into each profile individually on the program educators tab.

To update educators one at a time, click “Update” and enter the fees in the right-hand side modal that appears.

To update multiple educator fees at once, select multiple educator’s checkboxes on the left hand side, then click “Change fees or services”. Please note, the fees you enter in this modal will apply to **all** educators you selected.



No updates

In some months, a portion of your educators may not have a change to their fees. To make note of this in this system, select any educators who have no updates via the checkboxes next to their name, and then click the “Confirm no change” button. This will update the educator’s fees with a new date, and move them to the “Updated” status.

To view the fee totals at any time, navigate to the program details tab on the program educator’s profile.

2.3.4 – Filtering program educators

Click the “Add filters” button to filter your list of program educators by their status, date of last JET review, “new” status, if they have room for more children as indicated by the agency, and for “removed” status.

Click “Add Filters”, select the applicable filter, and then click “Apply filters” to view the filtered list.

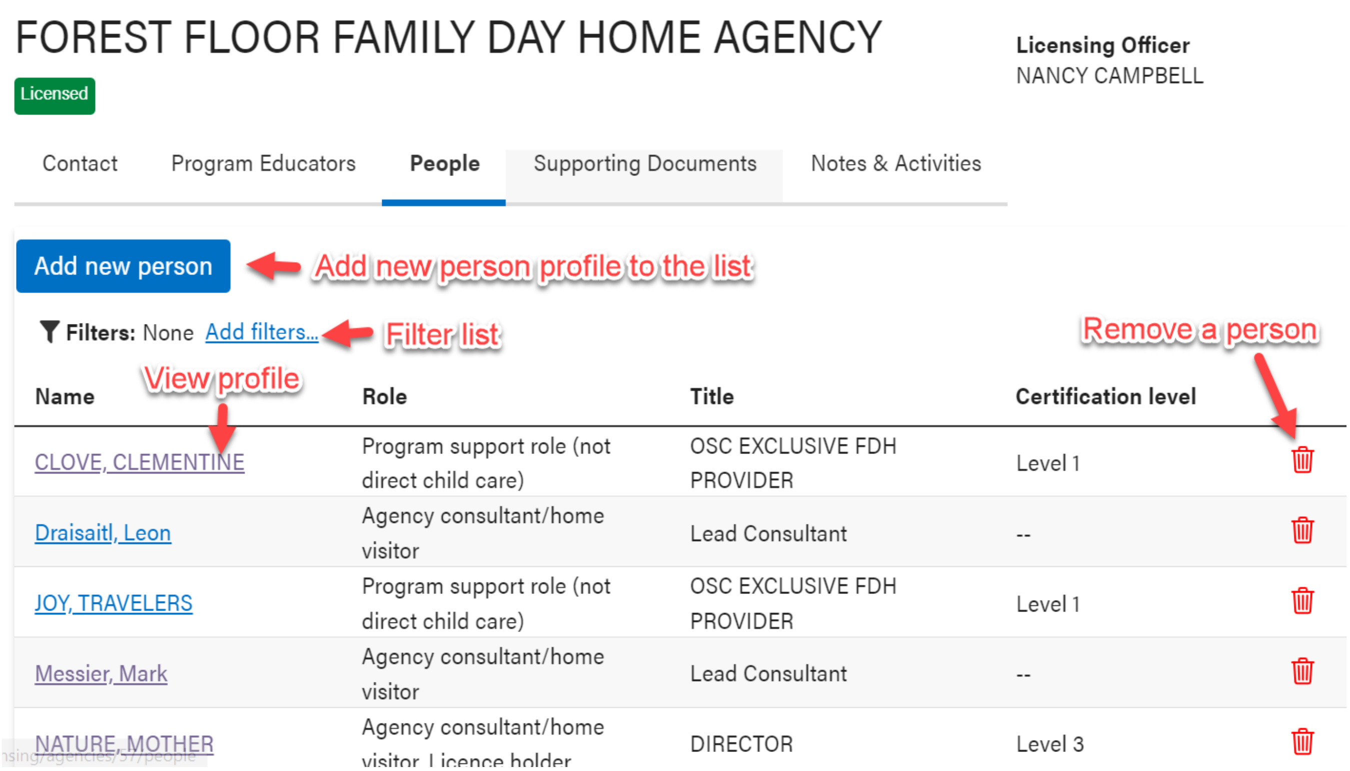
2.3.4.1 – Filtering for removed program educators
If you need to view or edit information for a program educator’s profile who has been removed, you can filter the list of program educators to access all previously removed profiles.

Click “ Add Filters”, scroll down, check off “Program educators who are no longer with the program”, and then click “Apply filters”. Then, click the person’s name from the filtered list to view the profile.

2.4 – People

The *People* tab contains a list of all the people (staff, administrators, license holders) associated with your program. Each person’s profile on this tab has key information related to their certification, role at the program, optional contact information, and optional requirements tracking. Your program is required to keep this list of people as up to date as possible.

From this tab, you can view all people profiles, add new people, and remove people.



2.4.1 – Adding people

To add a new person to the *People* tab, click the “Add New Person” button.

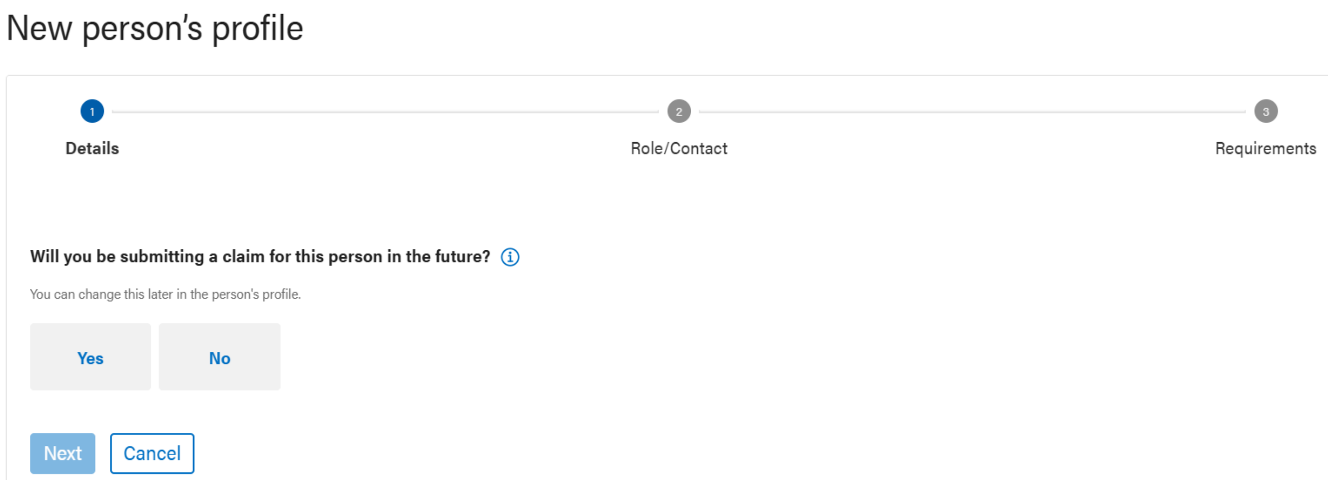
Step 1 – Setting the claim status and connection to the Certification profile
The first step to adding a person is to set their claim status. This is a yes or no question which asks if you will intend on submitting a wage top-up claim for this person. If yes, this person will appear on future claims, starting in the June 2025 claim.

Next, you will have to connect the person profile to the Early Childhood Educator certification database. Enter the person's certification ID, date of birth, and click "Search for profile" to look up the individual – if the individual is correct, click "Next".

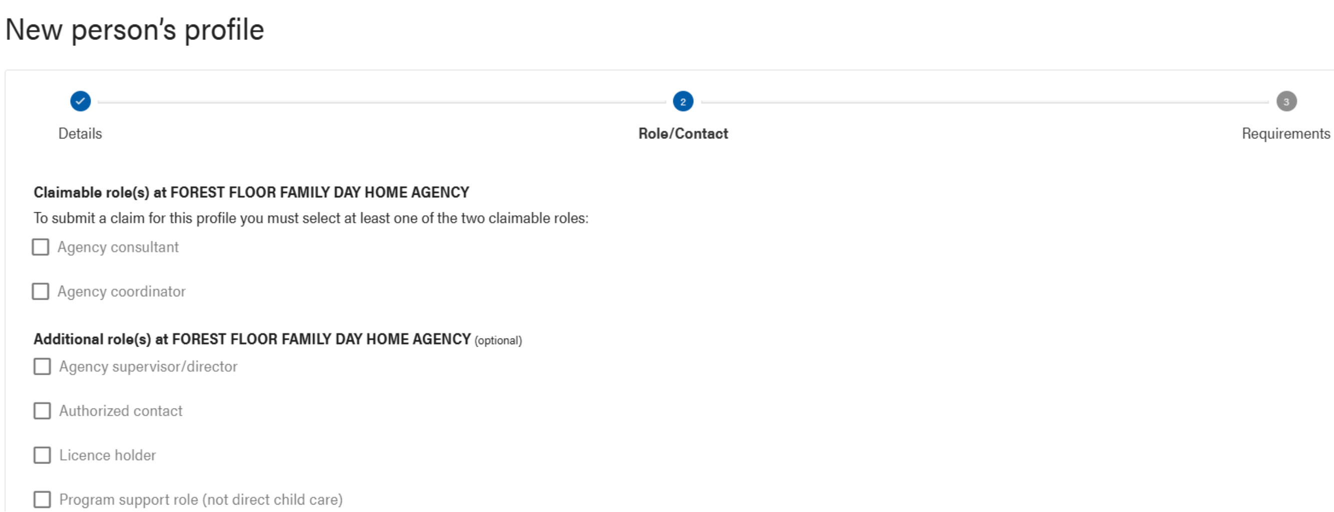
Connecting a profile to the certification database will display the person's certification level and status. You can view a person's profile for any updates to their certification level and status.

If you are unable to find the person, but the certification number and date of birth are accurate, contact CS.LicensingSystemSupport@gov.ab.ca for assistance.

If the person is not certified, or you will not be claiming them, click "No" to the initial claim question. You can connect the profile to the certification database later, directly from their person profile.



Step 2 – Role/Contact
Step 2 of adding a person requires you to add role and contact information.

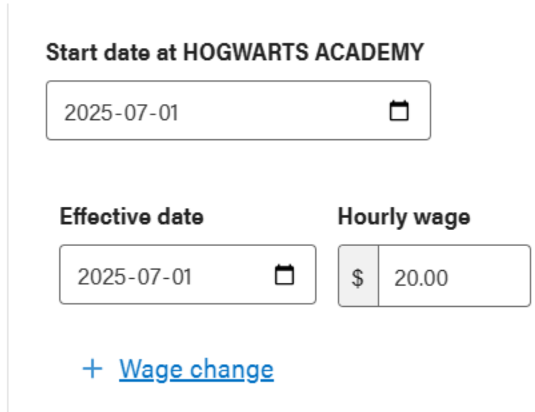


If you selected that the individual will be claimed, then you must select one of agency consultant or agency coordinator. You can optionally select other, non-claimable roles as well.

Some information on this step is optional and will be indicated as such.

Enter the person's role, title (optional), what they should/could be contacted by GOA staff for (optional), start date, email (optional) and phone number (optional).

For claimable individuals, you will need to enter a wage and the date it went into effect. An individual will only appear on the claim if they have a wage with an effective date that is on or before the claim month. If an individual's wage changes in the future, you can view the profile and click "Update" to change it at any time.



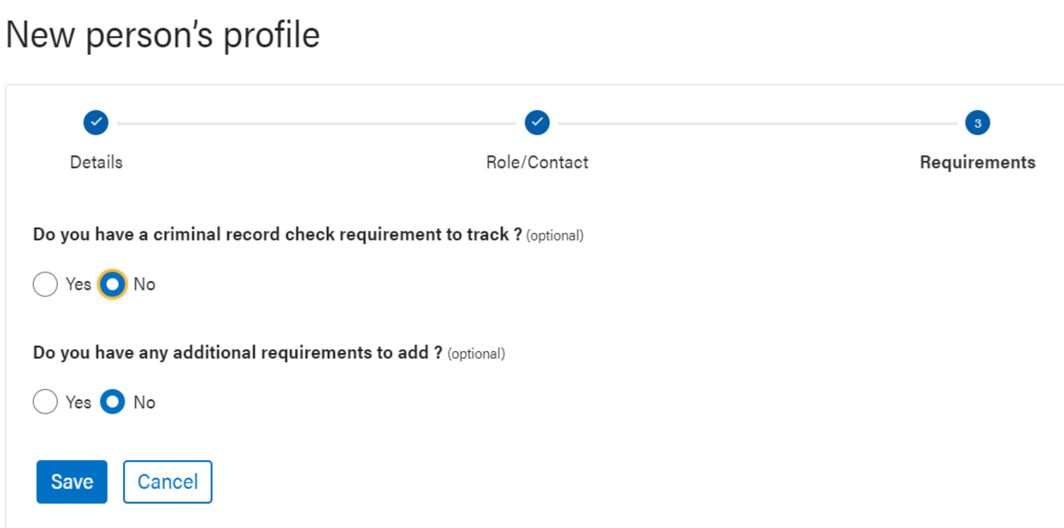
Please note, if the individual is a licence holder, there are a couple additional requirements to complete. In addition to multiple phone numbers being required (including an after hours number), you will also enter their licence holder capacity, and mailing address preference.

This information can be edited or updated at any time in the future from the person's profile.

Once call information is entered, click "Next".

Step 3 – Requirements
Step 3 is an optional step where you can add status for critical requirements of a person. This includes the option to put in valid dates for a criminal record check, as well as additional requirements.

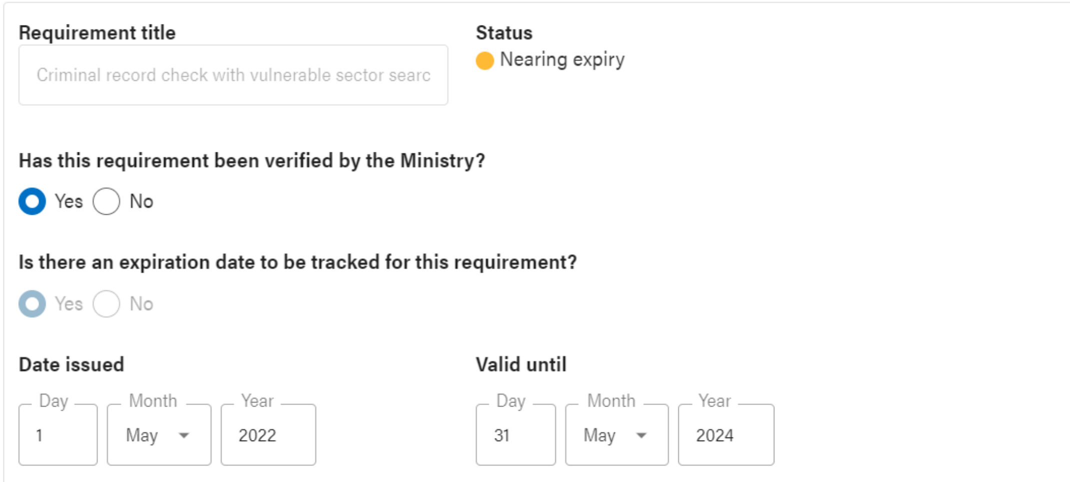
If you would like to use the Portal to enter and track criminal record check or other requirements, click "Yes" to one or both of the options on this step.



If you select "Yes", you'll enter some more information specific to the requirement. For criminal record checks, this includes a date issued and an expiry date.

The "Has this requirement been verified by the Ministry" can be toggled on or off by your Licensing Officer on the person's profile if they have viewed the criminal record check themselves.

Requirements will also have a status – automatically set by the system – based on the dates entered. These include valid, nearing expiry, and expired.



For additional requirements, you will need to enter the “Requirement title” manually, with the optional ability to turn off the expiration date.

Once all requirements have been entered, click “Next” to complete the addition of the person. Their profile will now be added to the *People* tab.

2.4.2 – View a person profile

To view a person’s profile, click their name on the *People* tab. This will direct you to their person profile. The person profile consists of three tabs of information which directly match the three steps complete when adding a person.

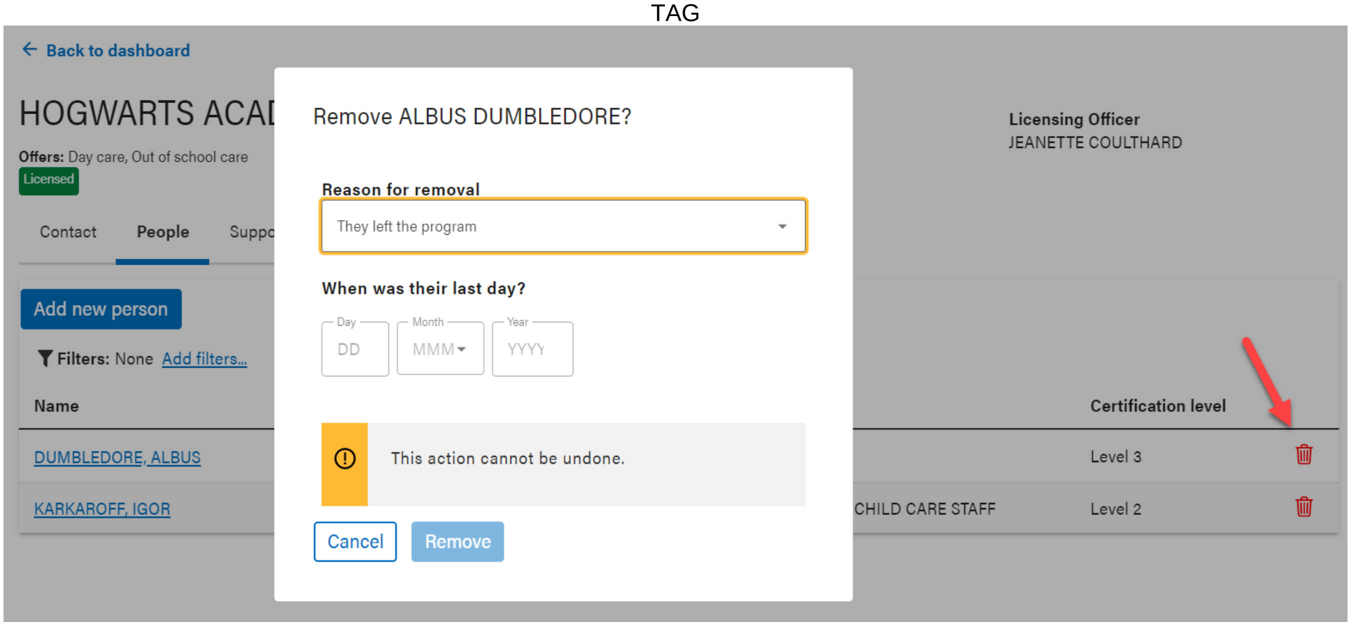
To update any of this information, click “Update” on the tab, complete your changes, and then click “Save”.

Please note, if a person’s profile is connected to the certification database, their name, date of birth, and certification information cannot be changed. The person will need to contact the Early Childhood Educator Staff Certification Office to request any changes to their profile. These changes will be automatically populated to their person profile following the update.

2.4.3 – Removing a person

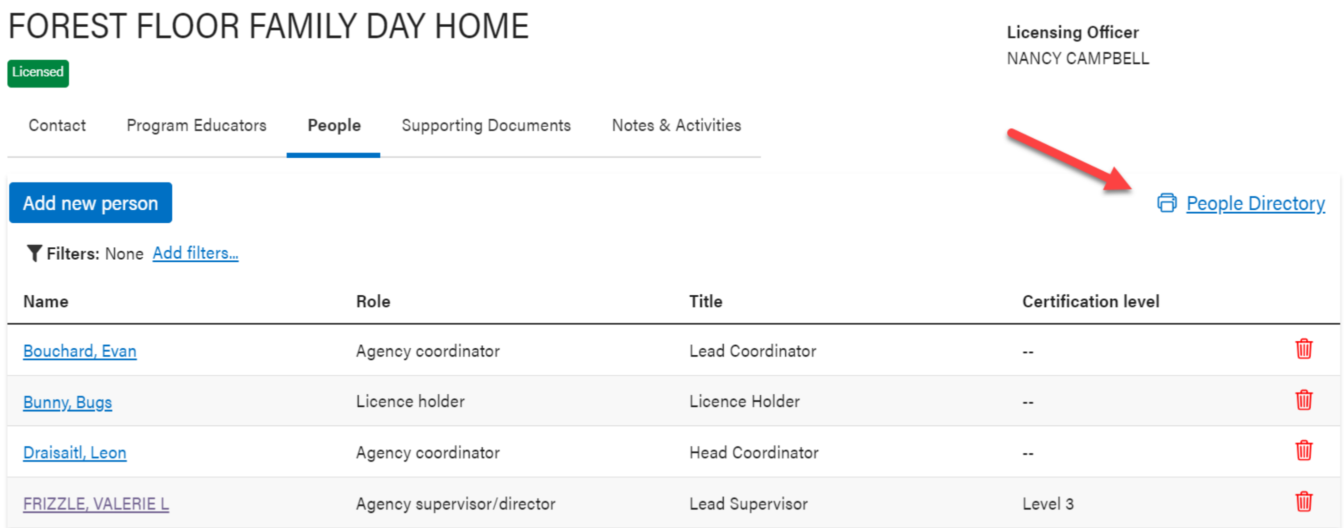
You can remove a person from the *People* tab by clicking the delete icon on the right hand side of the page. Select a reason for removal, and then enter their last day if they left the program. Click “Remove” to complete the action.

TAG



2.4.4 – People directory

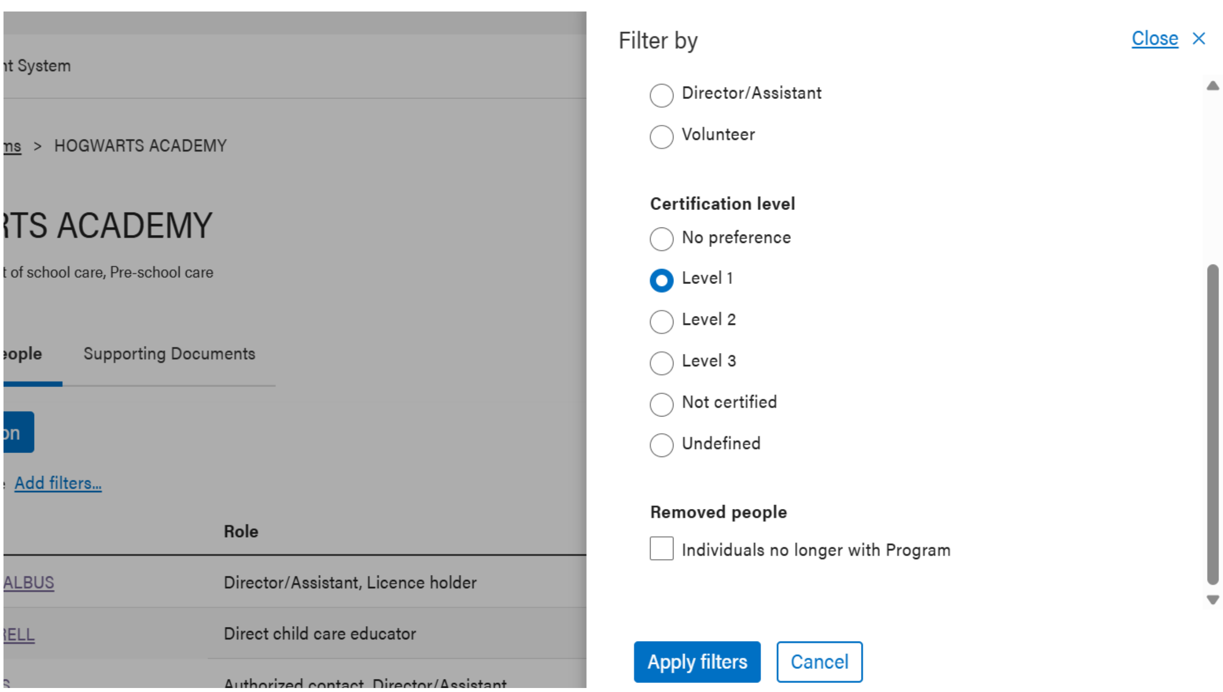
To download and/or print a list of the people on your *People* tab, click the *People Directory* tab. This will automatically generate and download a PDF copy of the list to your computer, in your Downloads folder.



2.4.5 – Filters

Click the Filters button to filter your list of people by their role, certification level, or removed status.

Click "Filters", select the applicable filter, and then click "Apply filters" to view the filtered list.



2.4.5.1 – Filtering for removed people profiles

If you need to view or edit information for a person's profile who has been removed, you can filter the list of people to access all previously removed profiles.

Click "Filters", scroll down, check off "Individuals no longer with the program", and then click "Apply filters". Then, click the person's name from the filtered list to view the profile.

2.5 – Agency notes & activities

The *Notes & activities* tab is an area of the profile that allows certain activities to be created by both your agency and your licensing officer. After completing these activities, your agency and the licensing team can interact through [comments and follow-ups].

The ***Notes & activities tab* on the agency profile** displays all notes & activities that not only pertain to your agency, but also all of your program educators. This tab acts as a hub of information for all activities happening at and within your agency. Specific program educator activities can still be found within their own profiles, in addition to displaying here.

[Here is a training video that shows how to navigate this tab].

2.5.1 – Consultations

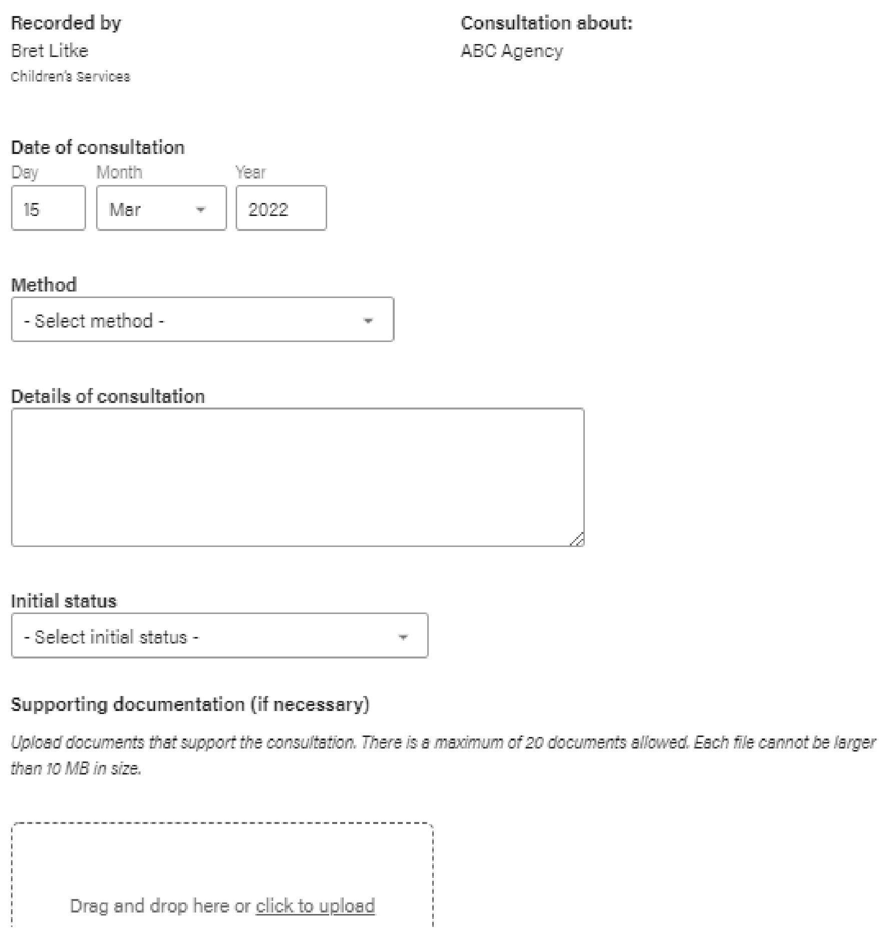
If you would like to record a consultation that you had with your licensing officer that is specifically about your agency and not one of the program educators, you can record it here.

Your licensing officer can also record these consultations, but only one record of the consultation is needed.

On the *Notes & activities* tab, click “add new activity”, then select “consultation”, and click “continue”.

Enter the date of consultation, the method (phone/email/in-person), the details of the consultation, and the status.

You can also upload an image or file to a consultation by dragging and dropping or clicking to upload a file.



The status of the consultation is simply whether any follow-up is required. The two statuses you can select are:

- **No further action –** The consultation has been completed and the matter is concluded. There will be no further action.
- **Follow-up required –** The consultation has occurred, but either your agency or the licensing officer feels the need to follow-up on the matter. The consultation is marked with this status to indicate that more work is required.

After entering all the information, click “Save” to complete the add consultation activity.

If the consultation has been marked as **no further action,** the action is completed.

If the status is **follow-up required,** review the next section of this guide for directions on adding follow-ups and comments to an activity.

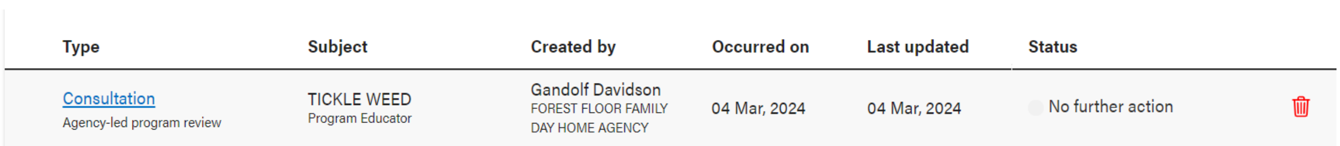
2.5.2 – Follow-ups and comments

Activities such as consultations and non-compliances have a feature that allows you and the licensing team to follow-up and comment on these activities.

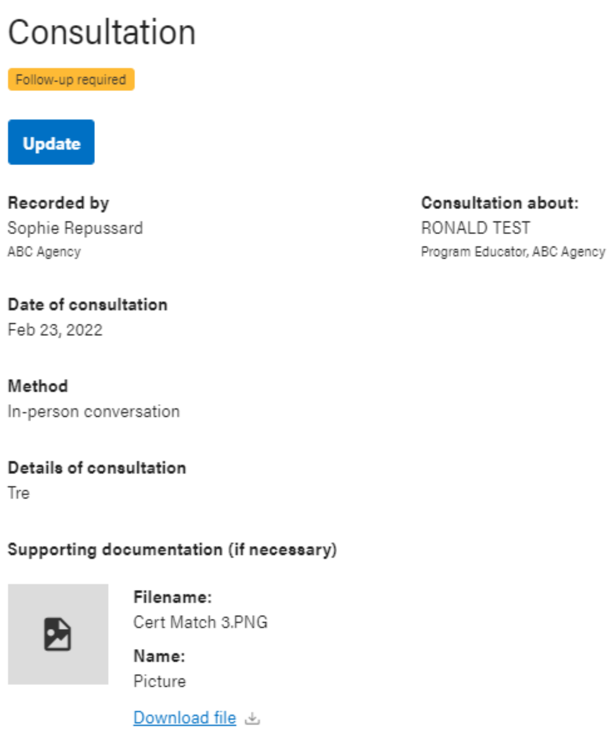
Follow-ups and comments are recorded within the activity section and allow you to update progress and change an activity’s status.

- **Follow-ups –** Typically used to record a follow-up on an activity that has progressed the status of said activity. For example, visiting an agency following a consultation to resolve an issue at hand.
- **Comments –** Typically used to leave a comment on the activity that hasn’t progressed the state of the activity itself.

To access this feature, click “View” on the activity you would like to comment or follow-up on. In the example below, a consultation is selected.



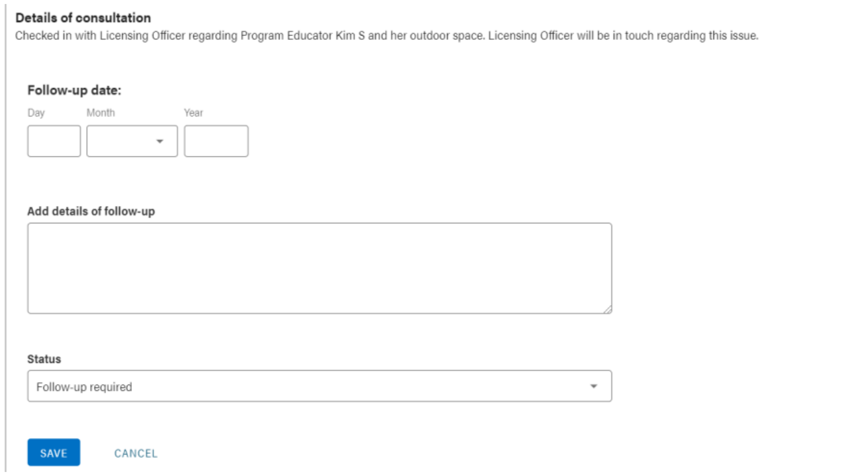
Type	Subject	Created by	Occurred on	Last updated	Status
Consultation Agency-led program review	TICKLE WEED Program Educator	Gandolf Davidson FOREST FLOOR FAMILY DAY HOME AGENCY	04 Mar, 2024	04 Mar, 2024	No further action



At the bottom of the activity, “Add follow-up” and “Add comment” appear.

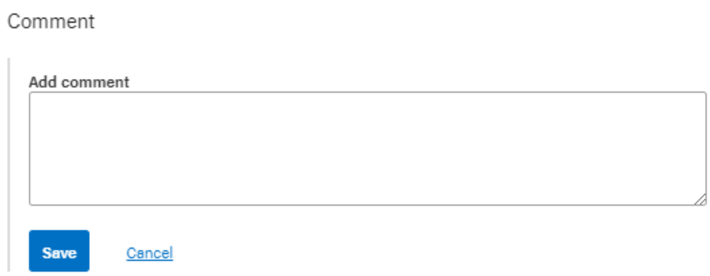
Click the action you would like to complete.

Add follow-up
If you select "Add follow-up", fields for the follow-up date, details of the follow-up and status will appear.



Add the date, details of the follow-up, select a status, and then click "Save" to add the follow-up.

Add comment
If you select "Add comment", a field will appear to allow you to enter a comment.



Add the comment and click "Save" to add the comment.

Keeping the status of an activity up to date

It is important to update the status of an activity, if necessary, when adding a follow-up. The status helps indicate who needs to work on the activity.

For example, if a non-compliance is ready for your licensing officer to review, it is important to add a follow-up, make note of the detail of that follow-up, and change the status to "Ready for Ministry Review". This will let your licensing officer know that they need to take action.

Additionally, consultations that require follow-up should be marked as "Follow-up required", and resolved consultations as "No further action".

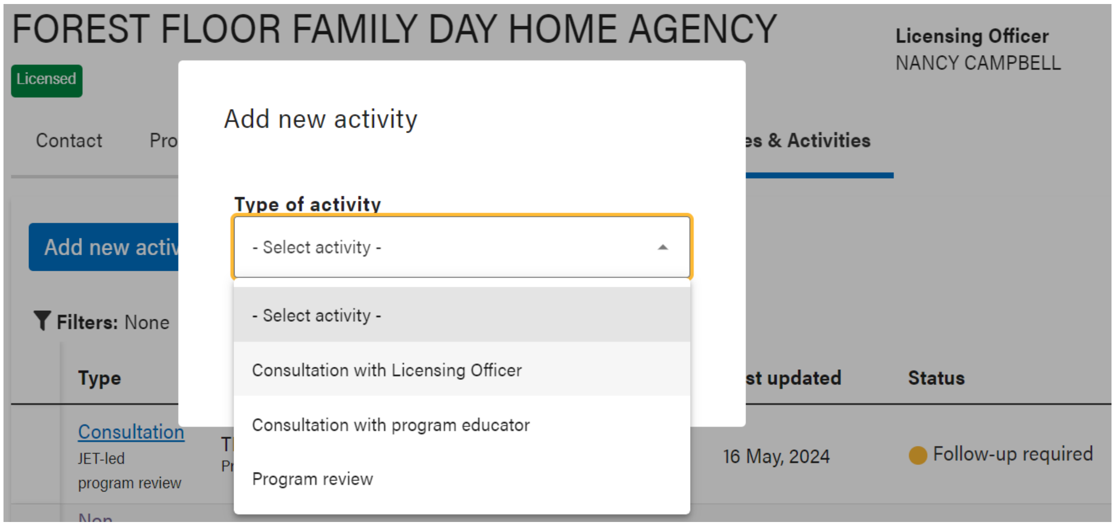
Keeping these status' up to date will ensure a smooth, efficient process for you and your licensing officer.

2.5.3 – Adding a program educator activity from the agency profile

You can add program educator activities directly from the agency *Notes & activities* tab. This prevents having to search for the program educator's profile first, which can save time.

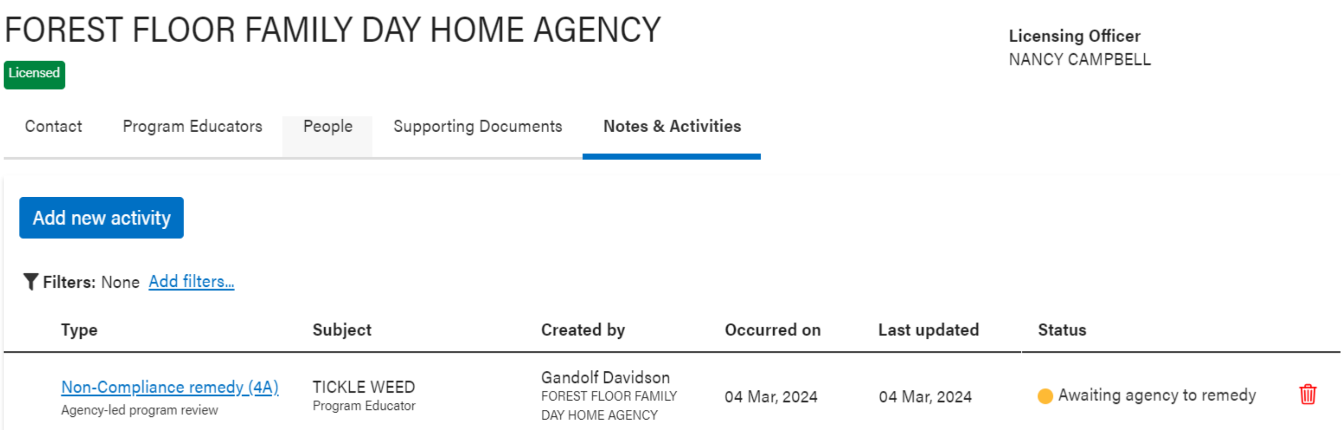
To do this, navigate to the agency's *Notes & activities* tab, click "Add New Activity", and select one of the program educator activities: program review or consultation.

A drop down list will appear where you can select the program educator. Click "Continue" to open the activity.



2.5.4 – Filtering notes & activities

The *Notes & activities* tab on the agency profile contains lots of information. As a result, the tab contains an enhanced filtering system to make it easier to find what you are looking for.



The filtering system allows you to filter the following criteria:

- **Type** – examples: consultation, program review, non-compliance remedy
- **Subject** – examples: all agency activities, all program educator activities, individual program educators
- **Status** – examples: awaiting ministry action, awaiting ministry to remedy, follow-up required, etc.
- **Date** – the time period when certain activities were created or last updated.

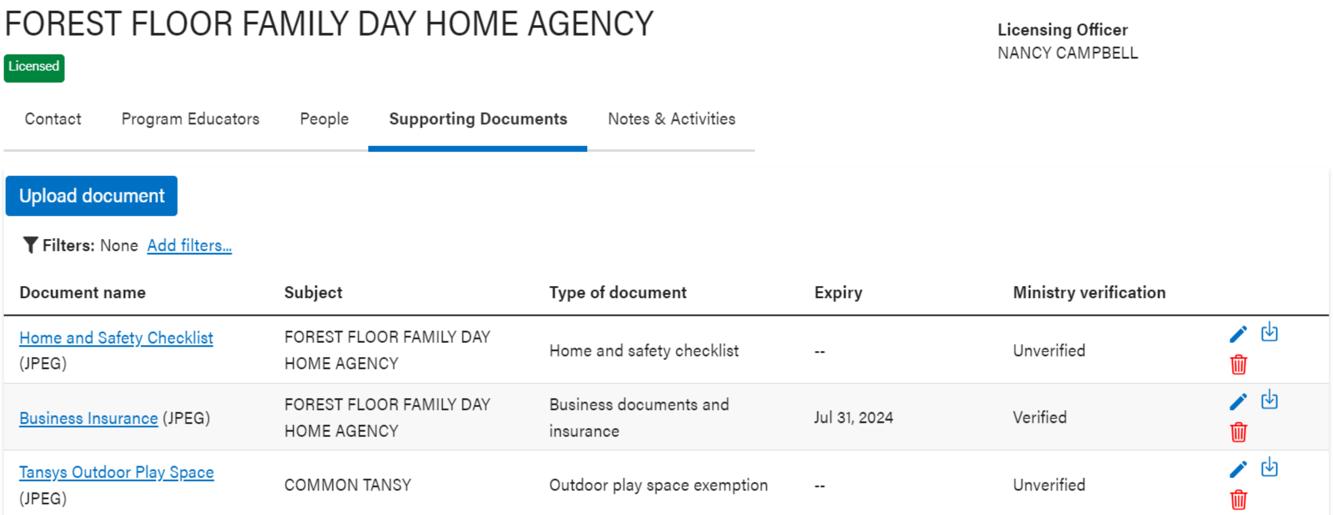
2.6 – Agency supporting documents

Here is a training video to support you in your use of this feature

The *Supporting documents* tab on the agency profile displays supporting documents that you have uploaded for your agency and program educators.

Each document contains a name, subject (agency or program educator), type, and expiry date (if applicable).

To view a document, click “Download file”. The file can be viewed after it has downloaded to your device. This usually takes only a couple of seconds.



FOREST FLOOR FAMILY DAY HOME AGENCY

Licensed

Licensing Officer
NANCY CAMPBELL

Contact | Program Educators | People | Supporting Documents | Notes & Activities

Upload document

Filters: None Add filters...

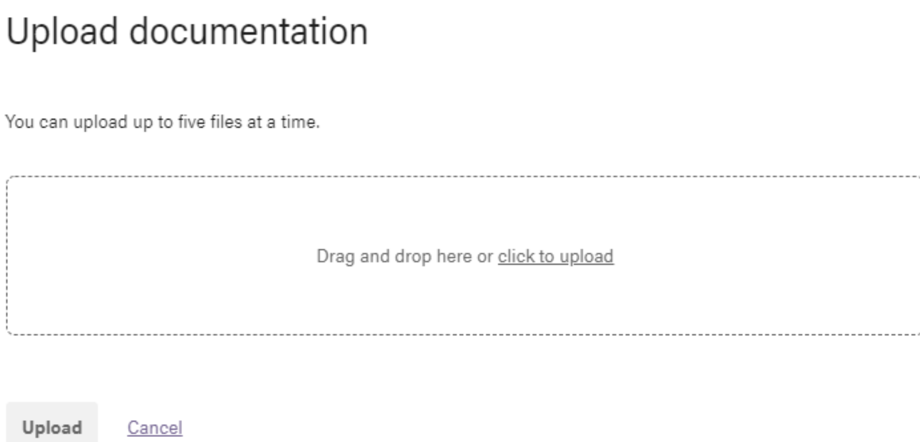
Document name	Subject	Type of document	Expiry	Ministry verification
Home and Safety Checklist (JPEG)	FOREST FLOOR FAMILY DAY HOME AGENCY	Home and safety checklist	--	Unverified
Business Insurance (JPEG)	FOREST FLOOR FAMILY DAY HOME AGENCY	Business documents and insurance	Jul 31, 2024	Verified
Tansys Outdoor Play Space (JPEG)	COMMON TANSY	Outdoor play space exemption	--	Unverified

You can sort all columns, either alphabetically or by date, by clicking “Name”, “Subject, “Type”, or “Expiry”. Clicking a second time will reverse the sort order.

2.6.1 – Uploading a document

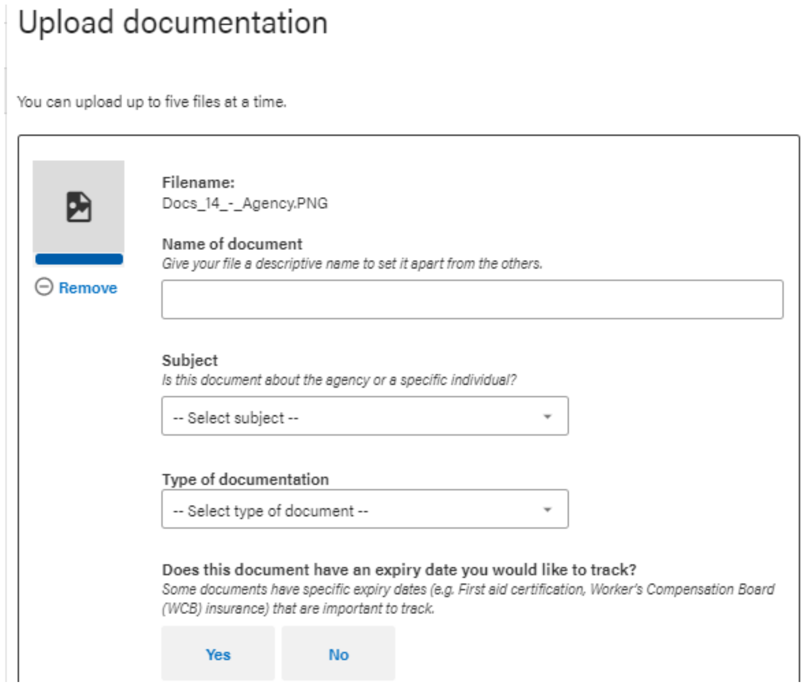
To upload a document, click the “Upload Document” button on the *Supporting documents* tab. Then drag or drop up to five files at a time.

Please only upload documents that fit under the “types” of document on the upload list.



The supported file types are PDF, PNG, JPEG, DocX (Microsoft Word), and XLSX (Microsoft Excel). Files must be 10 MB or smaller.

After you have selected your files, you will need to enter data for each of them.



Enter the following data:

- **Name** – Give your document a name that describes what it is and/or who it is for
- **Subject** – Indicate if the document is for your agency or a program educator – and if so, which educator
- **Type** – Select the type of document from the drop-down menu.
- **Expiry** – If the document expires, click "Yes" and then enter the date of expiry

The following types of documents are selectable for **agency** documentation: Business documents and insurance, corporate registration, home and safety checklist, and program plan.

After you have entered all information, click "Upload" to complete the upload.

2.6.2 – Filter supporting documentation

The list of supporting documents has the potential to get lengthy over time. Use filters to help narrow down what you are looking for.

Click "Add filters" on the *Supporting documents* tab to bring up a list of filters.

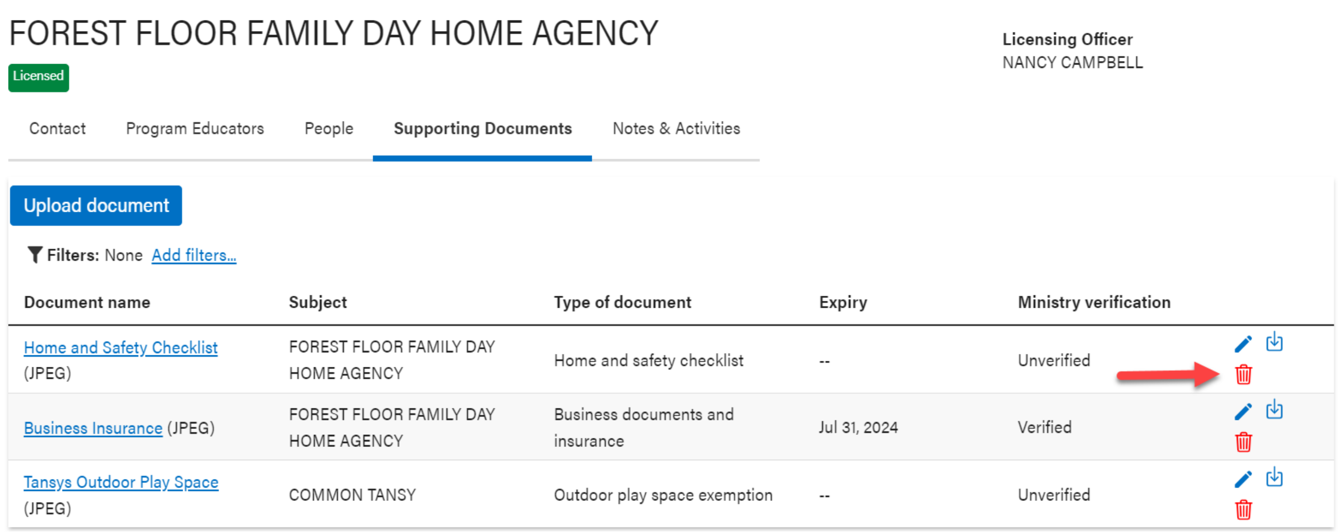
You can filter by:

- **Subject** - Agency documents or program educator documents
- **Type** - Business documents and insurance, corporate registration, home and safety checklist, and program plan
- **Expiry date** - One week from current date, two weeks, one month, or already expired.

After selecting your filters, click "Apply" to view the filtered list.

2.6.3 – Remove a document

To permanently remove a document, click the "Remove" link on the right hand side of the documents table. You can only remove documents that you yourself have added to the file.



You will be prompted to confirm the removal. Please note that this is a permanent removal and cannot be undone.

2.7 – Agency status

An agency profile can have three different statuses: **Licensed, Read-Only, and Expired**. They are as follows:

- **Licensed –** This status is for licensed agencies with active program educators. When your agency profile is licensed, you can view and edit all your profile information.
- **Read-only –** This status grants agency staff access to view their profile information but does not allow the ability to edit. Licensing staff will assign this status when an agency is closing.
- **Expired –** If your agency is no longer licensed, its status will change to expired. Agency staff will no longer be able to view or edit the profile in the portal.

These statuses are set by your associated licensing officer. For the most part, if your agency is actively licensed, you will have **licensed** status.

3.0 – Program educator profile

3.1 – What is a program educator profile

The program educator profile is where your agency can keep important information about a program educator up to date.

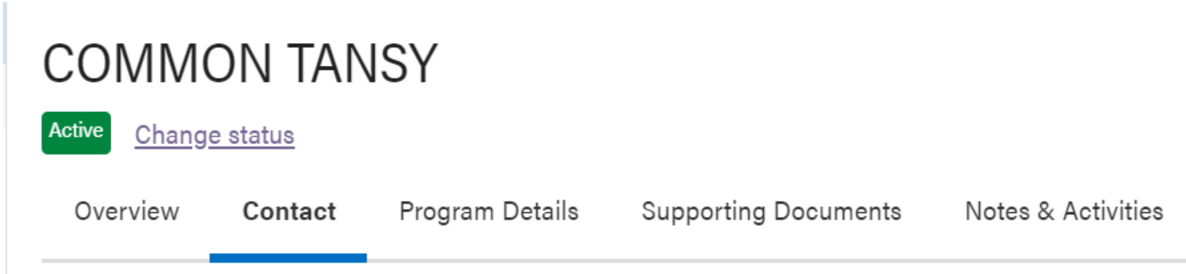
This includes contact information for the program educator, details about their program, and an area to record various notes and activities.

> **The agency manages the program educator profile on behalf of the program educator, because individual program educators do not have access to the portal.**
>
> The agency is responsible for adding new program educators, keeping program educator profiles up-to-date, and removing program educators that are no longer associated with the agency.

3.1.1 – Program educator profile tabs

The program educator profile consists of five areas of information, called tabs. They are the *Overview, Contact*, *Program details*, *Supporting documents* and *Notes & activities* tabs.

This section of the guide will cover how to use each of these tabs.

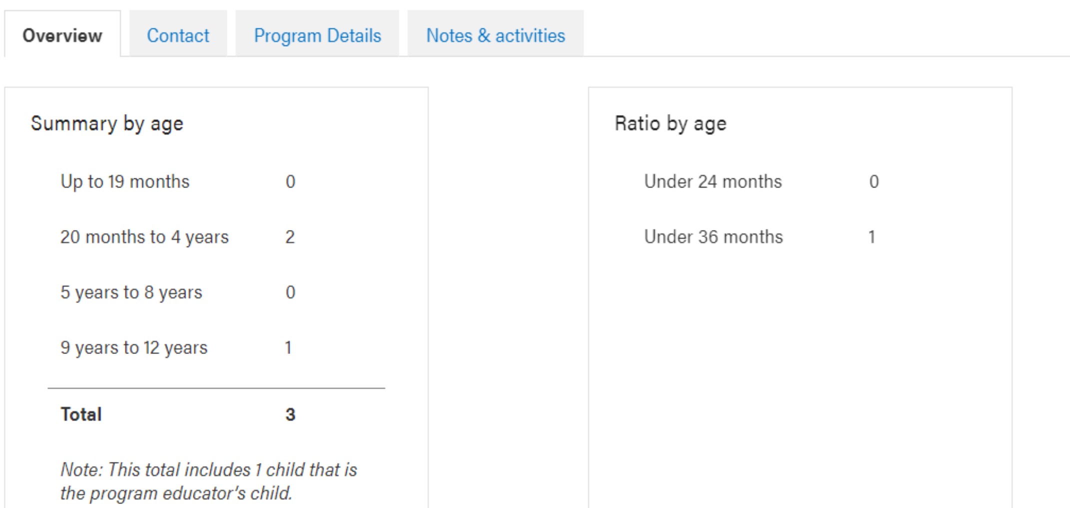


3.2 – Overview

The overview tab gives a brief summary of the ages of children that the program educator cares for.

The age summary displays two different age breakdowns:

- One is a detailed summary, displaying four different age categories of children in care.
- The other is a simpler summary that focuses specifically on the age ratios that licensing focuses on: the number of children under 24 and 36 months of age.



The age summaries generate from the *children details* section found in the [*program details* tab].

The number of children in each age category will automatically update after you make a change to the [*children details* section].

3.3 – Program educator contact

The *Contact* tab contains all the program educator's contact information, as well as some information about the individual educator themselves.

The contact information includes the educator's name, date of birth, certification information, training taken, languages spoken, business/mailing address, phone number, email, and any emergency contacts.

3.3.1 - Name, date of birth, and certification information

The educator's name, date of birth, and certification information are directly linked to their child care staff certification profile. These specific pieces of information cannot be changed in the portal.

If the educator's name or date of birth is inaccurate, please contact your licensing officer who can assist with updating this information.

3.3.2 – Training taken

This section captures training that the educator has taken, specifically related to child care. This could include a teaching certificate, car seat training, or other similar types of education.

There is no requirement to add training taken for an educator, but adding courses will assist with looking up educators who can care for children with specific needs.

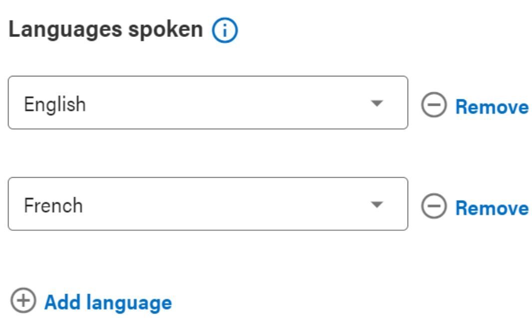
To add training taken, click "Update" on the *Contact* tab, then click "add training", and enter the name of the training in the text field. Click "add training" again to add another course. Click "Save" at the bottom of the page to save your changes.

There is no limit on the number of courses that can be added, but they should all be related to child care.

To remove a training course, click "Update", and then click "Remove" next to the desired course. Click "Save" at the bottom of the page to complete the removal.

3.3.3 – Languages spoken

This section captures all of the languages that an educator speaks. This helps identify bilingual educators.



To add a language, click "Update" on the *Contact* tab, click "Add language", and select the language from the drop down menu. Click "Save" at the bottom of the page to save your changes.

The drop down menu contains all languages found on the Canadian census.

To remove a language, click "Update", and then click "Remove" next to the desired language. Click "Save" at the bottom of the page to complete the removal.

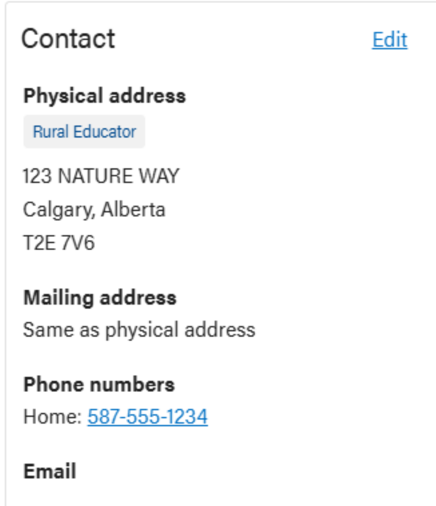
3.3.4 – Contact – physical and mailing address

This section captures the physical and mailing addresses of the educator.

To add or edit the information in this section, click "Update" on the *contact* tab, and enter the necessary information. Click "Save" at the bottom of the page to save your changes.

After adding a program educator, the mailing address from the educator's certification profile will appear.

If applicable, a "Rural Educator" badge will appear, if the educator provides care in a rural municipality.



3.3.5 – Contact – phone numbers (optional) and email

This section captures the physical and mailing addresses of the educator.

To add or edit the information in this section, click “Update” on the *contact* tab, and enter the necessary information. Click “Save” at the bottom of the page to save your changes.

A phone number can be removed by clicking “Update”, and then clicking “Remove” next to the desired phone number. Click “Save” at the bottom of the page to complete the removal.

3.3.6 – Emergency contacts (optional)

This section captures an emergency contact for the Program Educator. **This is optional.**

To add an emergency contact, click “Update” on the *Contact* tab, then click “Add contact” in the emergency contacts section.

Each emergency contact needs to have the “Contact for” field filled in, first/last name, and at least one phone number. An email is optional. Click “Save” at the bottom of the page to save your changes.

To remove an emergency contact, click “Update”, and then click “Remove this contact” on the desired contact. Click “Save” at the bottom of the page to complete the removal.

3.4 – Program details tab

The *Program details* tab contains several details about a program, including hours of operation, child care details, and features of the home.

This tab can help find appropriate placements when searching for available child care spaces.

3.4.1 – Name of program and website (optional)

You can update these fields with the program’s name (e.g., ABC Day Home) and website if they have one.

To add a program name or website, click “Update” on the *Program details* tab, and enter the program name and/or website in the appropriate fields. Click ‘Save” at the bottom of the page to complete the addition.

3.4.2 – Start date with agency

This is the date that the program educator officially began caring for children as a part of your agency.

If the educator’s employment status is still **pending approval**, this date can be left blank until a start date is confirmed. In order to designate a program educator as **active**, a start date must be entered.

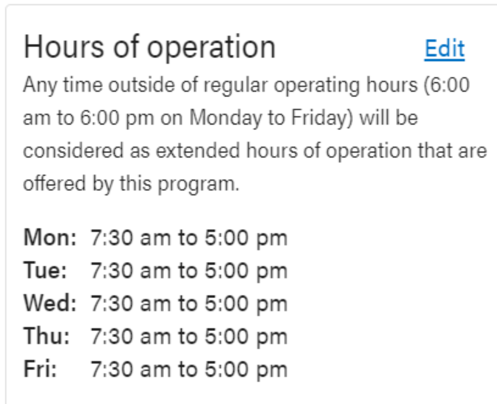
There is no restriction on the date entered, meaning you can enter a date in the past if the program educator is already working for your agency, or a date in the future if they will be working soon.

To add or change a start date, click “Update” on the *Program details* tab, enter the date, and click “Save” at the bottom of the page to complete the change.

3.4.3 – Hours of operation

This section highlights the program’s hours of operations.

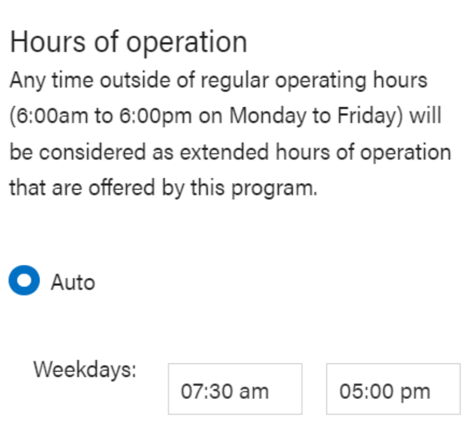
To add the program’s hours, click “Edit” on the *Program details* tab, and scroll down to the hours of operation section.



For each day that the program is open, click the square box next to the day. A checkmark will appear.

Then click the box under “Opening time” and enter the opening time. Repeat this for the “Closing time” field.

If the opening and closing times apply to multiple days, you can use the “Auto” option, by selecting the “Auto” radio button and entering an opening and closing time. This will automatically apply the same hours to all weekdays.



After all opening and closing times have been entered, scroll to the bottom of the page and click “Save” to complete the addition. The system will automatically separate the hours into regular and extended hours of operation.

Editing and/or deleting hours of operation

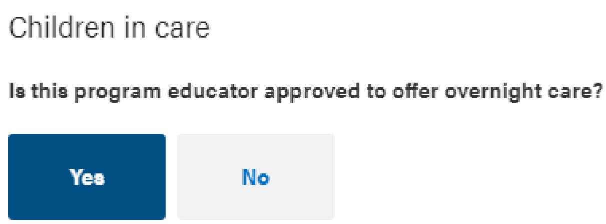
To edit the hours of operation, click “Edit” on the *Program details* tab, and either click the “Opening time” or “Closing time” field to adjust the time. Scroll down to the bottom of the page and click “Save” to save your changes.

To remove a day from operation, simply click the square box next to the desired day. The checkmark will be removed and the times will be automatically erased. Scroll down to the bottom of the page and click “Save” to save your changes.

3.4.4 – Overnight care indicator

If your agency has been approved to provide overnight care, you will be able to indicate which specific program educators offer overnight care.

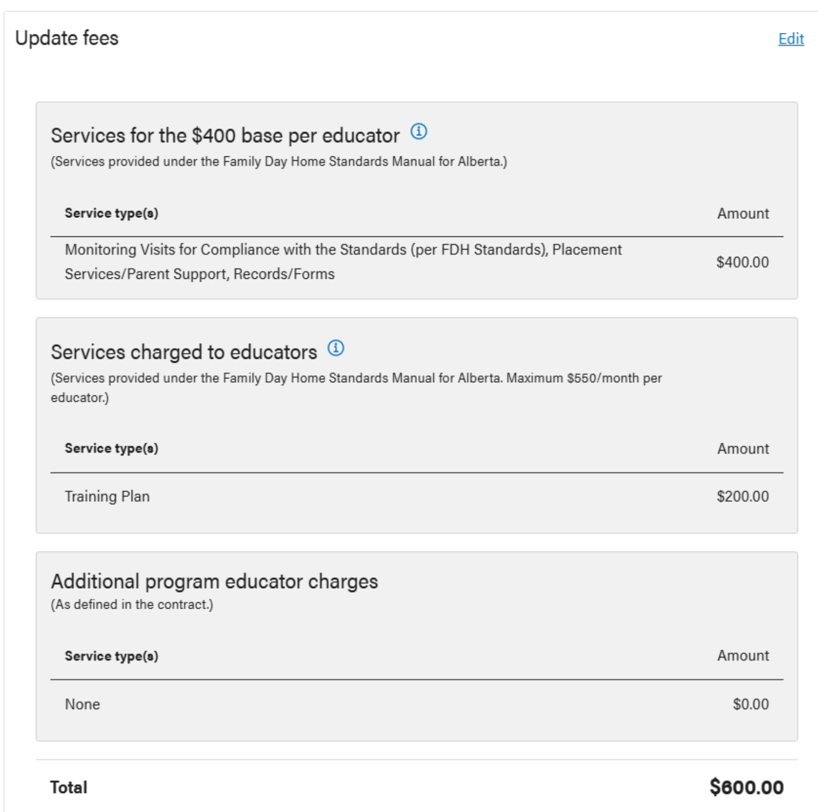
To update this, click “Update” on the *Program details* tab and scroll down to the “Is the program educator approved to offer overnight care” question. Click “Yes” or “No” to indicate if they are approved or not.



3.4.5 – Update fees

This section is used to record your agency’s fee summary for each educator. Please see section [2.3.3.2](#) of this guide for information on how to update multiple educator’s fees at once.

The fee section matches the same structure of fee reporting as referenced in the Family Day Home Agency Contract. There are three sections that your agency can report on.


Update fees
Edit

Services for the $400 base per educator
(Services provided under the Family Day Home Standards Manual for Alberta.)

Service type(s)	Amount
Monitoring Visits for Compliance with the Standards (per FDH Standards), Placement Services/Parent Support, Records/Forms	$400.00

Services charged to educators
(Services provided under the Family Day Home Standards Manual for Alberta. Maximum $550/month per educator.)

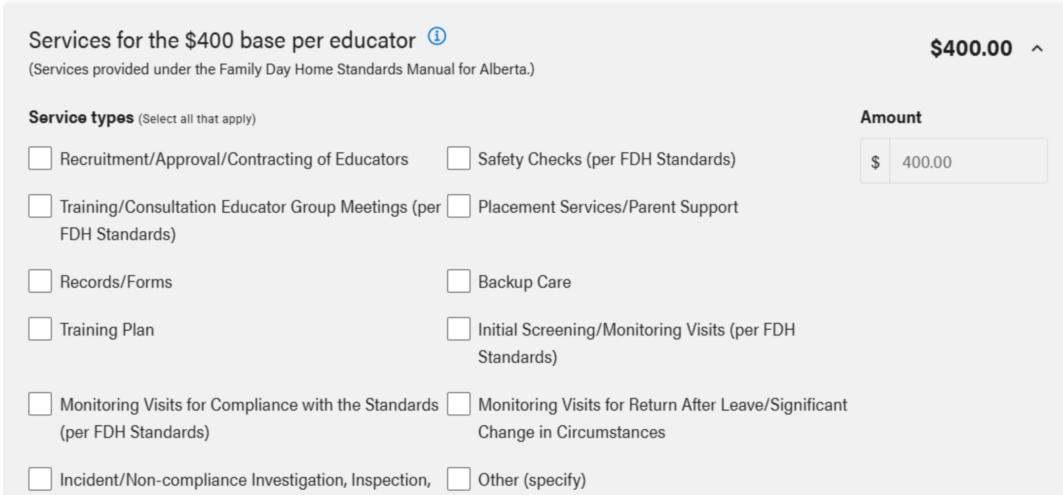
Service type(s)	Amount
Training Plan	$200.00

Additional program educator charges
(As defined in the contract.)

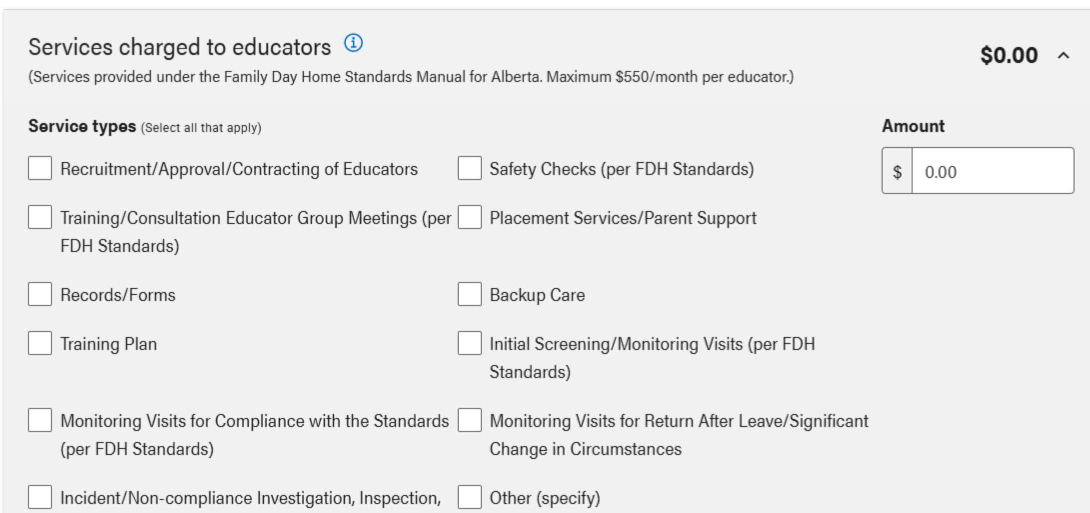
Service type(s)	Amount
None	$0.00

Total	$600.00

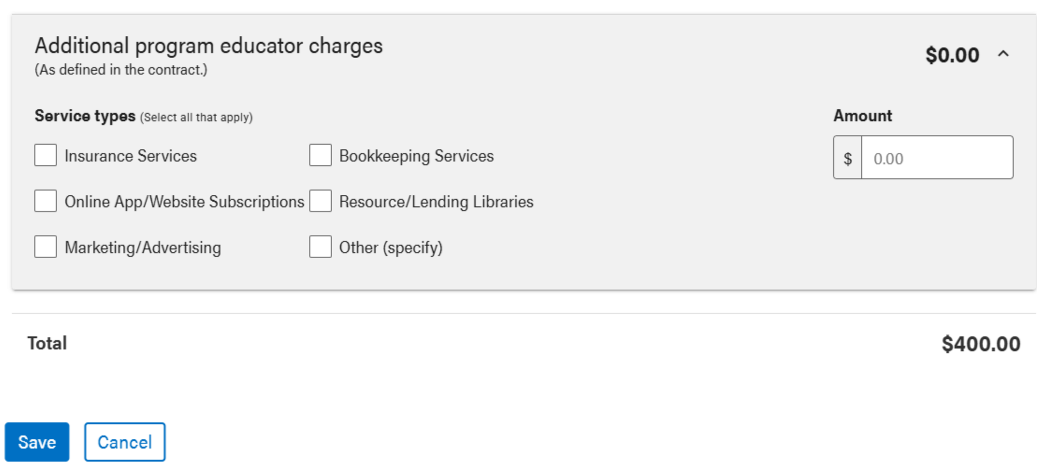
The first is the $400 base rate for services provided under the Family Day Home Standards Manual. In this section, the rate is locked in at $400, but your agency can select which services it provided for this educator, for that month, by checking all service(s) that apply.



The second is the additional services provided under the Family Day Home Standards Manual. In this section, your agency can select all service(s) that it provided in the month, and can also edit the monthly dollar total (to a maximum of $550).



The third and final section is the additional program educator charges, not found under the Family Day Home Standards Manual. In this section, your agency can select all service(s) that it provided in the month and edit the monthly total (no maximum dollar figure). This section is not claimable on your agency's monthly claim.



It's important to ensure this information is up to date on a month by month basis, for each educator.

After you have completed all sections, click Save to save your changes.

3.4.6 – Children in care

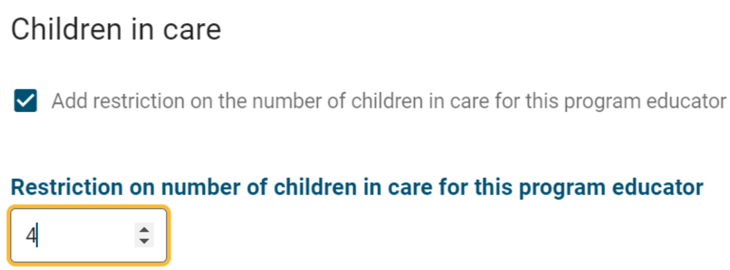
This section allows you to indicate if there is a restriction on the number of children in care at the program, as well as indicate if the program educator has room to care for more children.

Adding a restriction on the number of children in care

You can update this section if the program educator is required to care for less than the maximum number of children allowed by current regulations.

To add a restriction, click "Update" on the *Program details* tab, and scroll down to the *children in care* section. Click the square box next to "Add restriction on the number of children in care for this program educator".

A checkmark will appear, as well as a text field where you can enter the maximum number of children that a program educator can care for at one time. Enter the number, and click "Save" at the bottom of the page to save the added restriction.



Removing a restriction on the number of children in care

To remove a restriction, click "Update" on the *Program details* tab, and click the checkmark next to "Add restriction on the number of children in care for this program educator". The checkmark and the restricted number will be removed. Click "Save" at the bottom of the page to save your changes.

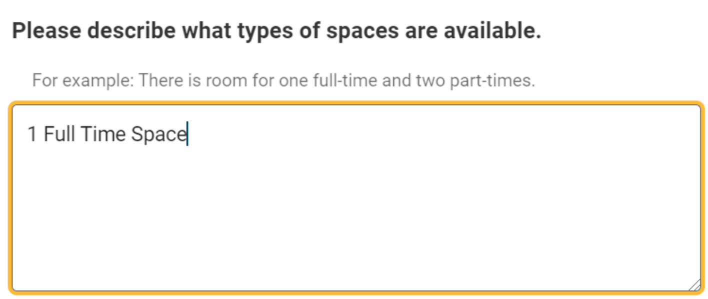
Does the program educator have room in their program for more children?

This section allows you to indicate if a program educator has room for more children in their program. This can make it easy for your agency and licensing to quickly review various programs to find available child care spaces.

To indicate if a program educator has room for more children, click "Update" on the *Program details* tab, and scroll down to "Does the program educator have room for more children" question.

Click "Yes" if the program educator does, and click "No" if the program educator does not.

If 'Yes" is clicked, a text box will appear where the details of the opening (example: 1 full-time, 2 part-time) are entered.



Click "Save" at the bottom of the page to save your changes.

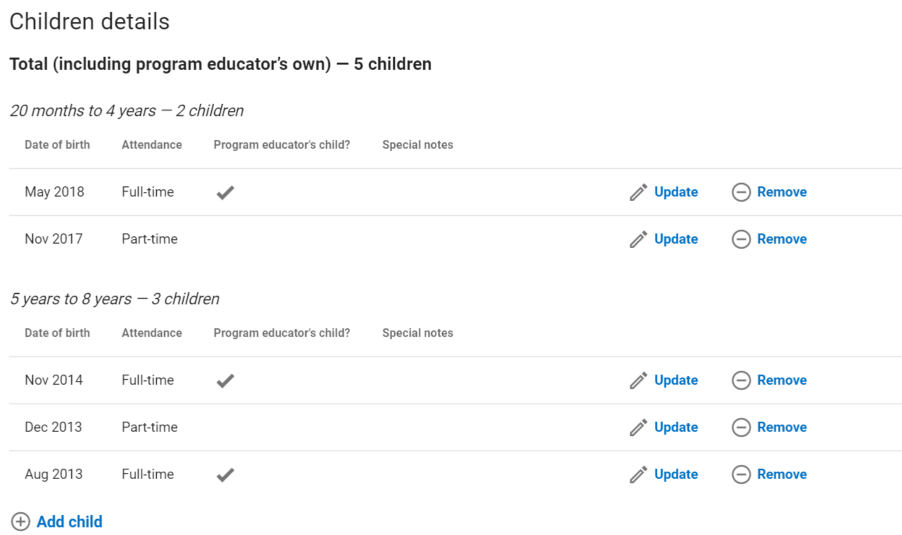
3.4.7 – Children details

This section highlights how many children are attending the program, the age ranges of the children in attendance, their full-time/part-time status, whether or not a child is one of the program educator’s own, and any special notes regarding a child.

<u>Children’s names and specific dates of births cannot be entered into the system to avoid any privacy concerns.</u>

The agency is responsible for keeping this table updated.

In order to ensure this data is as accurate as possible, agencies are encouraged to update this section at least once a month, possibly at the same time as your child care claim is submitted.



Children details

Total (including program educator’s own) — 5 children

20 months to 4 years — 2 children

Date of birth	Attendance	Program educator's child?	Special notes		
May 2018	Full-time	✔		Update	Remove
Nov 2017	Part-time			Update	Remove

5 years to 8 years — 3 children

Date of birth	Attendance	Program educator's child?	Special notes		
Nov 2014	Full-time	✔		Update	Remove
Dec 2013	Part-time			Update	Remove
Aug 2013	Full-time	✔		Update	Remove

Add child

Adding a child

To add a child, click “Update” on the *Program details* tab, scroll down to the children details section, and click “Add child”. Enter the child’s month/year of birth, their attendance status, whether they are the program educator’s child, and any special notes (not mandatory).

Click “Save” at bottom of the page to complete the addition.

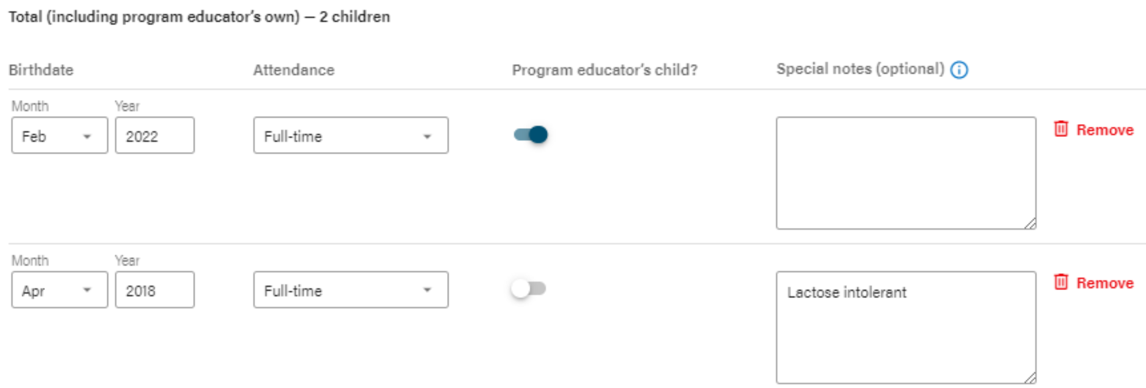
Updating a child’s information

To update an existing child’s information, click “Update” on the *Program details* tab, scroll down to the children details section, and click “Update” for the desired child.

Click “Save” at bottom of the page to complete the changes.

Removing a child

To remove a child, click “Update” on the *Program details* tab, scroll down to the children details section, and click “Remove” for the desired child. Click “Remove” again, then scroll down and click “Save” to complete the removal.



3.4.8 – Day home program features

This section contains other details about the home where the program operates.

This includes:

- The type of home
  - Stand-alone, townhouse, apartment, duplex/triplex/multiplex, mobile home
- Residents living in the home (other than the educator)
  - Only the number of residents aged 13-17 and 18+ are recorded
- If the home has pets
  - And if so, a description of the type of pets in the home
- If the program educator or another resident smokes or vapes
- Special menu restrictions
  - And if so, a description
- Outdoor play space status
  - Does the home have an approved outdoor play space?
  - If not, is there one within safe and easy walking distance?
  - Does the program educator have an exemption for no outdoor space?
  - If so, when does the exemption expire?

All of these fields must be completed, with details provided as necessary, in order to designate a program educator as **active.**

To add or update this information, click “Update” on the *Program details* tab, scroll down to the day home program features section, and fill in the necessary information. Click “Save” at the bottom of the page to complete your additions or changes.

3.5 – Program educator notes & activities tab

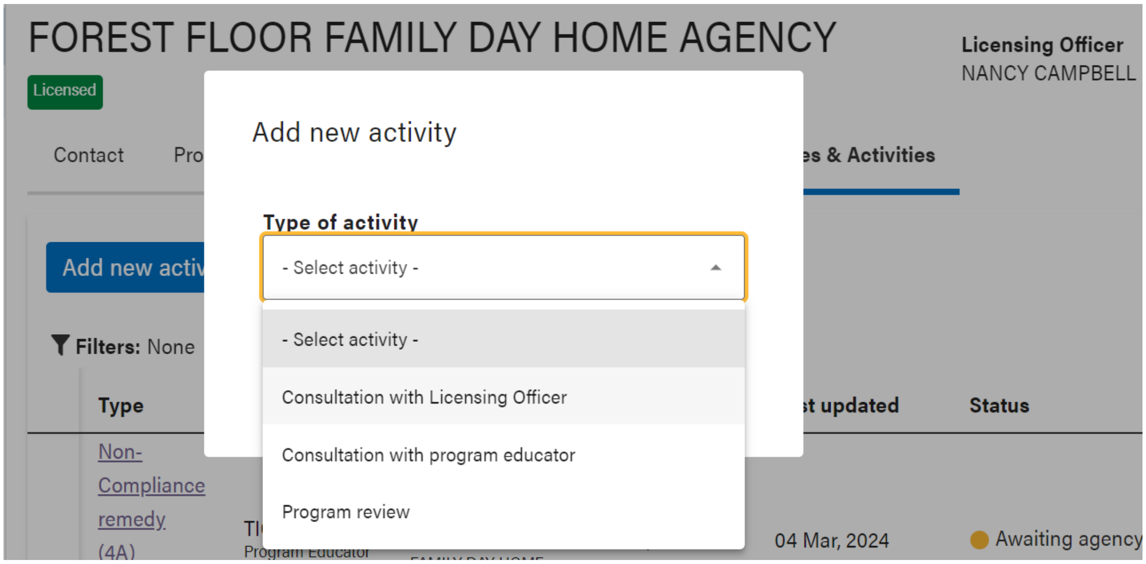
The *Notes & activities* tab on the program educator profile is an area of the profile that allows certain activities to be created by both the agency and licensing. After completing these activities, the agency and licensing staff can interact directly through comments and follow-ups.

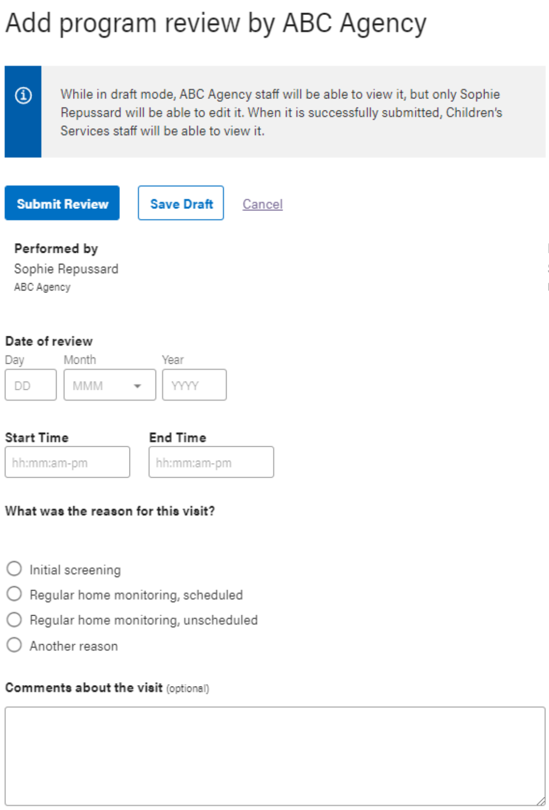
3.5.1 – Agency-led program review

The portal allows your agency to record a record of each visit you make to a home. This replaces the need to record the visit on the old “Family Day Home Program Profile” PDF form.

Here is a training video on how to use this feature.

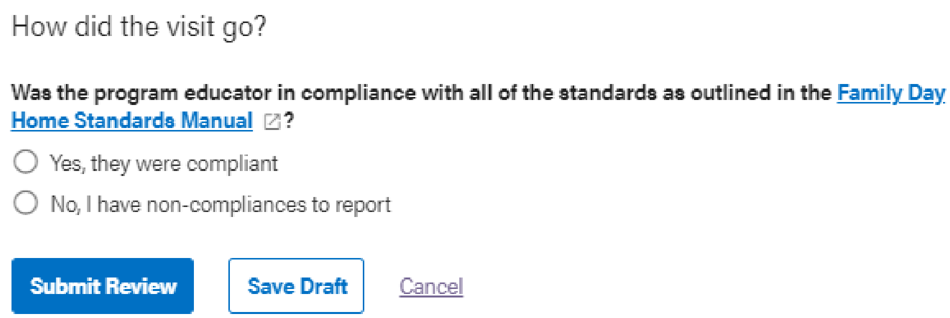
To add a record of your agency visit, navigate to the *Notes & activities* tab, click “Add New Activity”, and then select “Program Review”. Click “Continue”.





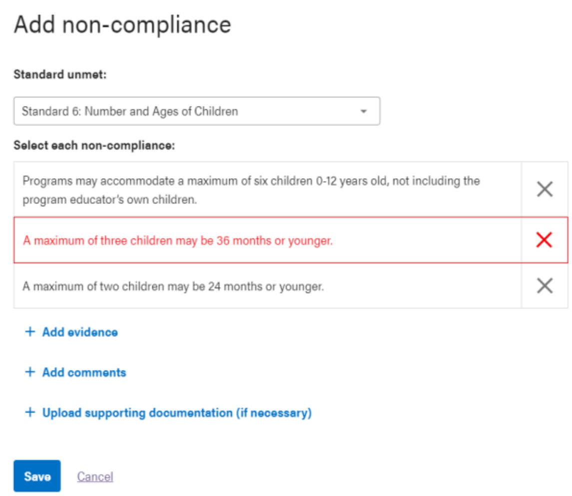
You will add the date of the review, the start and end time, the reason for the visit, and any comments about the visit (optional).

You will then select whether the program educator was in full compliance.

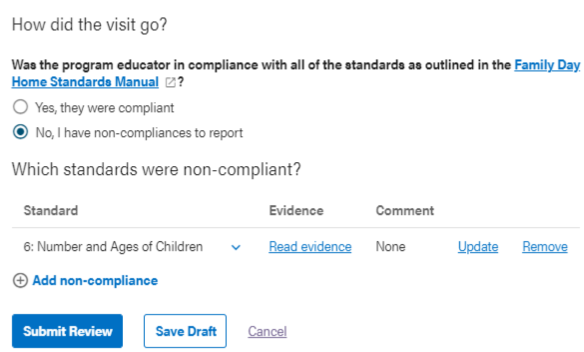


If the educator was in full compliance during your visit, select “Yes, they were compliant” and click “Submit Review”. The review is now completed and will appear on both the program educator and agency profiles. A record of the visit will also appear on the printable program profile.

If the educator was not in full compliance during your visit, select “No, I have non-compliances to report”. Then click ”Add non-compliance”.



Select the standard, the specific clause(s) found in non-compliance, and add any evidence, comments or documentation (such as evidence). Once completed, click “Save”. Repeat this process for all the non-compliances discovered during the visit.



After all non-compliances are entered, click “Submit Review” to submit the review, or “Save Draft” to save a draft version that can be completed later.

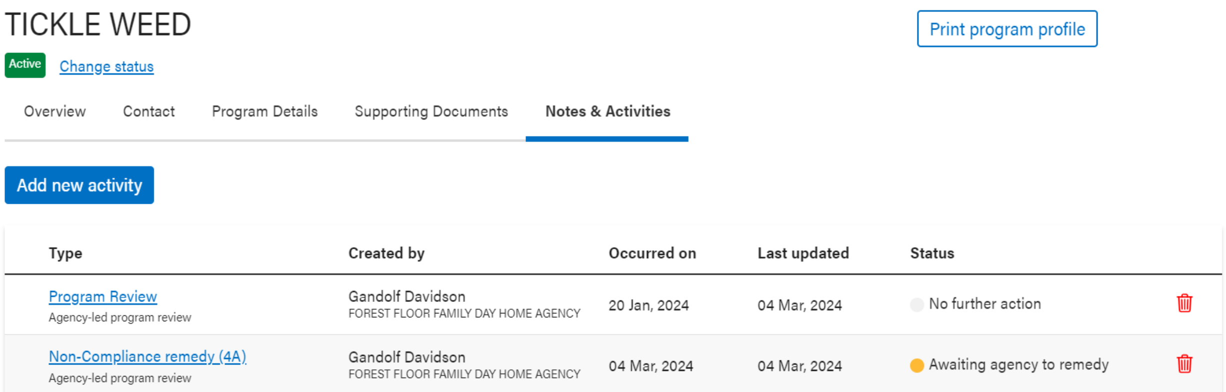
The review is completed after it is submitted and will appear on both the program educator and agency profiles. A record of the visit will also appear on the printable program profile.

Please refer to the next section for direction on how to complete the agency-discovered non-compliance activities.

3.5.2 – Non-compliances found by the agency

If you reported non-compliances as a part of your agency-led review, you will need to follow-up on those non-compliances afterwards.

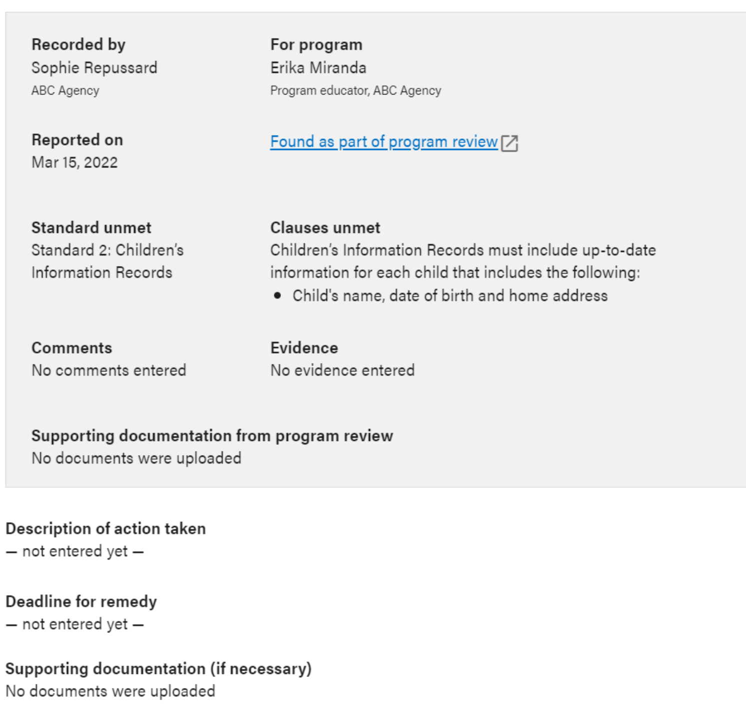
In the program educator's profile, a non-compliance activity will be created for each non-compliance discovered. Click "View" to open the activity.



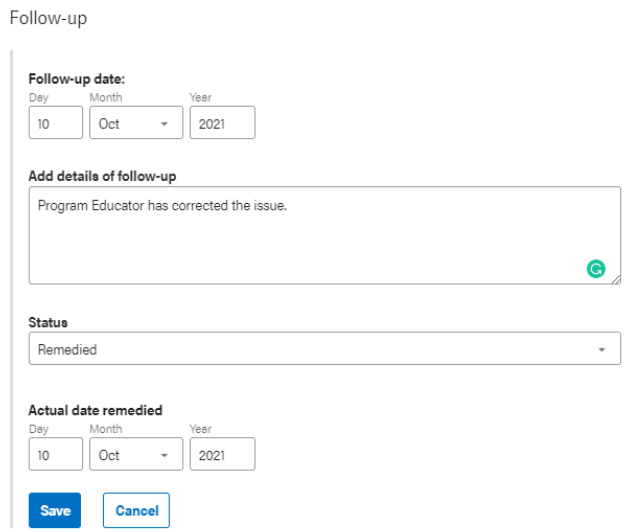
The goal is to follow-up on each non-compliance in order capture the important remedy details.

First, click "Update" in order to add a description of any action taken towards the non-compliance and the deadline for remedy.

If needed, click "Update" and then "click to upload" to upload any files or images to support the non-compliance, including evidence of remedy (if applicable).



After the non-compliance has been remedied, click "Add follow-up".

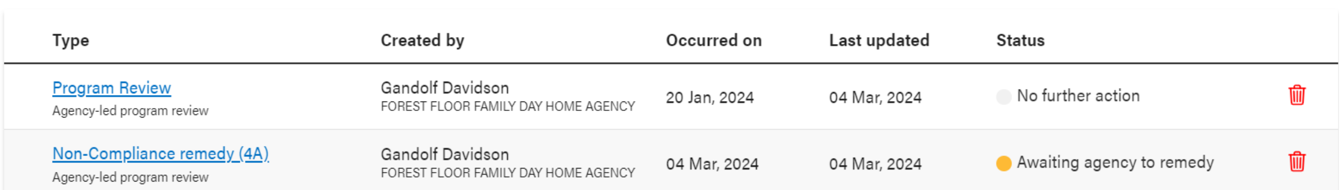


Enter the follow-up date, details of the follow-up, change the status to remedied, and enter the actual date the non-compliance was remedied. The remedy date can be a date in the past if you are retroactively entering this information.

Click "Save" to complete the follow-up and officially mark the non-compliance as remedied.

No further action is required. A record of the visit and the non-compliance will automatically appear on the printable program profile.

=



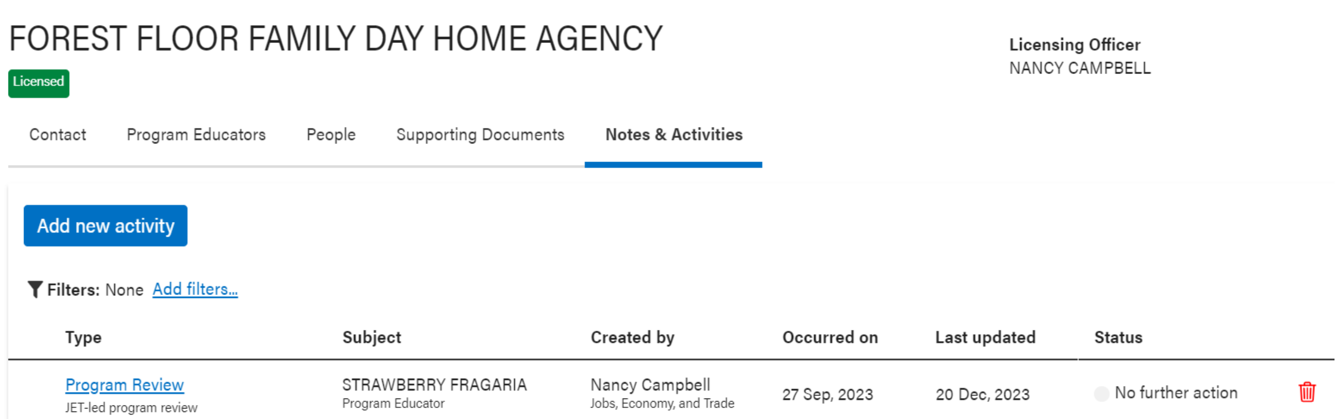
Type	Created by	Occurred on	Last updated	Status	
Program Review Agency-led program review	Gandolf Davidson FOREST FLOOR FAMILY DAY HOME AGENCY	20 Jan, 2024	04 Mar, 2024	No further action	
Non-Compliance remedy (4A) Agency-led program review	Gandolf Davidson FOREST FLOOR FAMILY DAY HOME AGENCY	04 Mar, 2024	04 Mar, 2024	Awaiting agency to remedy	

3.5.3 – Jobs, Economy, and Trade program review

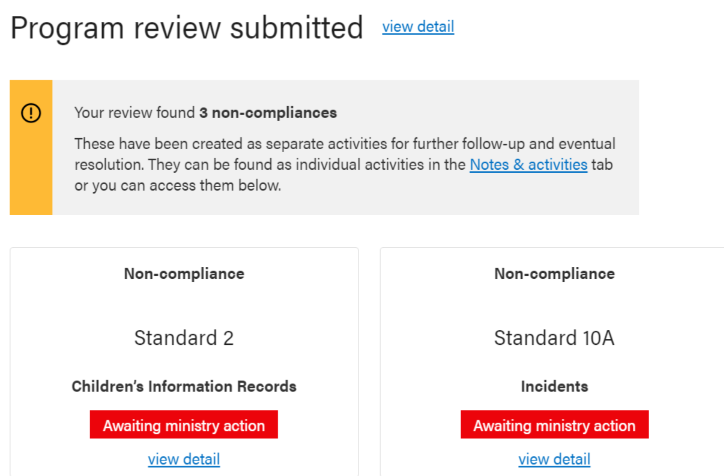
The portal allows Licensing Officers to record their program reviews in a digital format.

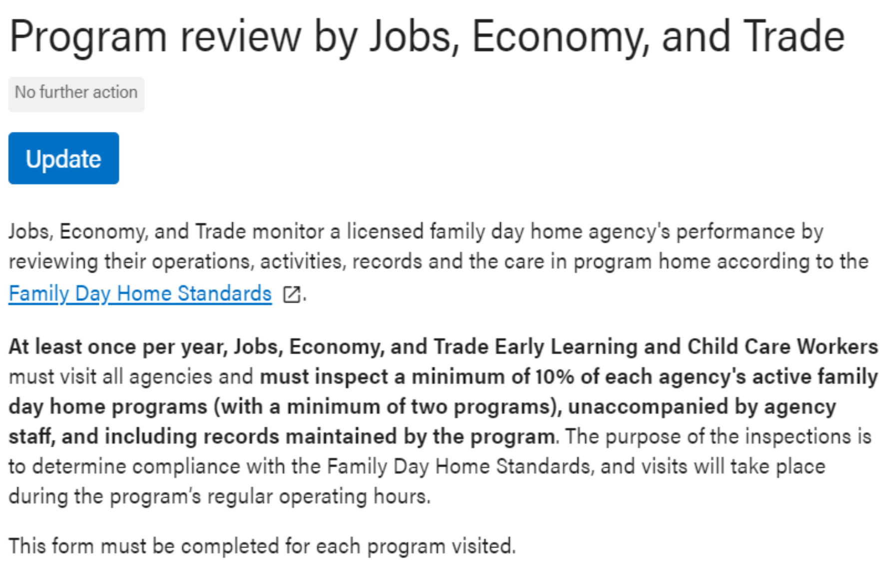
After a Licensing Officer completes their program review, you can view it on the program educator's profile, on the *Notes & activities* tab.

Click "View", and then "View Detail" to open the program review and see the details of the Licensing Officer's visit.



Type	Subject	Created by	Occurred on	Last updated	Status	
Program Review JET-led program review	STRAWBERRY FRAGARIA Program Educator	Nancy Campbell Jobs, Economy, and Trade	27 Sep, 2023	20 Dec, 2023	No further action	

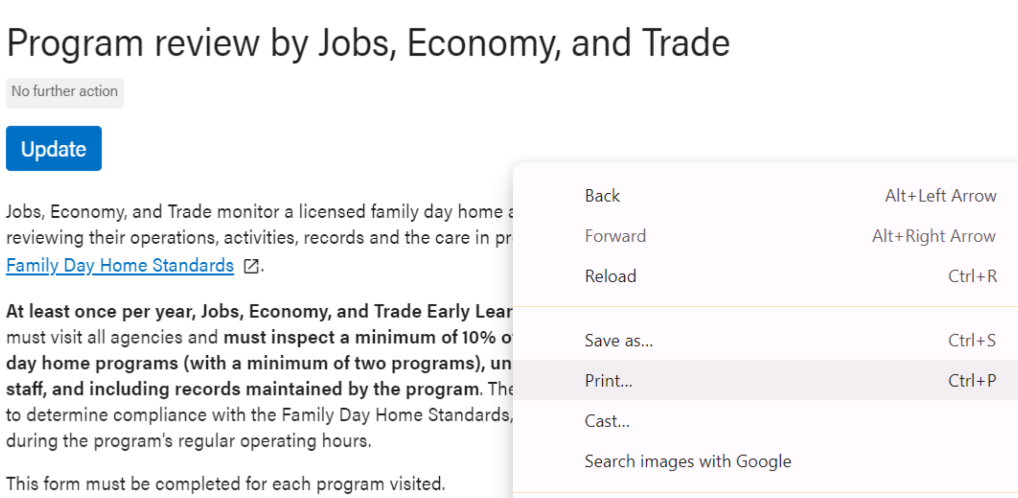




Download or print a JET review

You are able to download and/or print a copy of the Jobs, Economy, and Trade review.

To do so, find the review on the *Notes & activities* tab and click “View” and then “View detail” to open the review. Once viewing it, right-click and click “Print”.



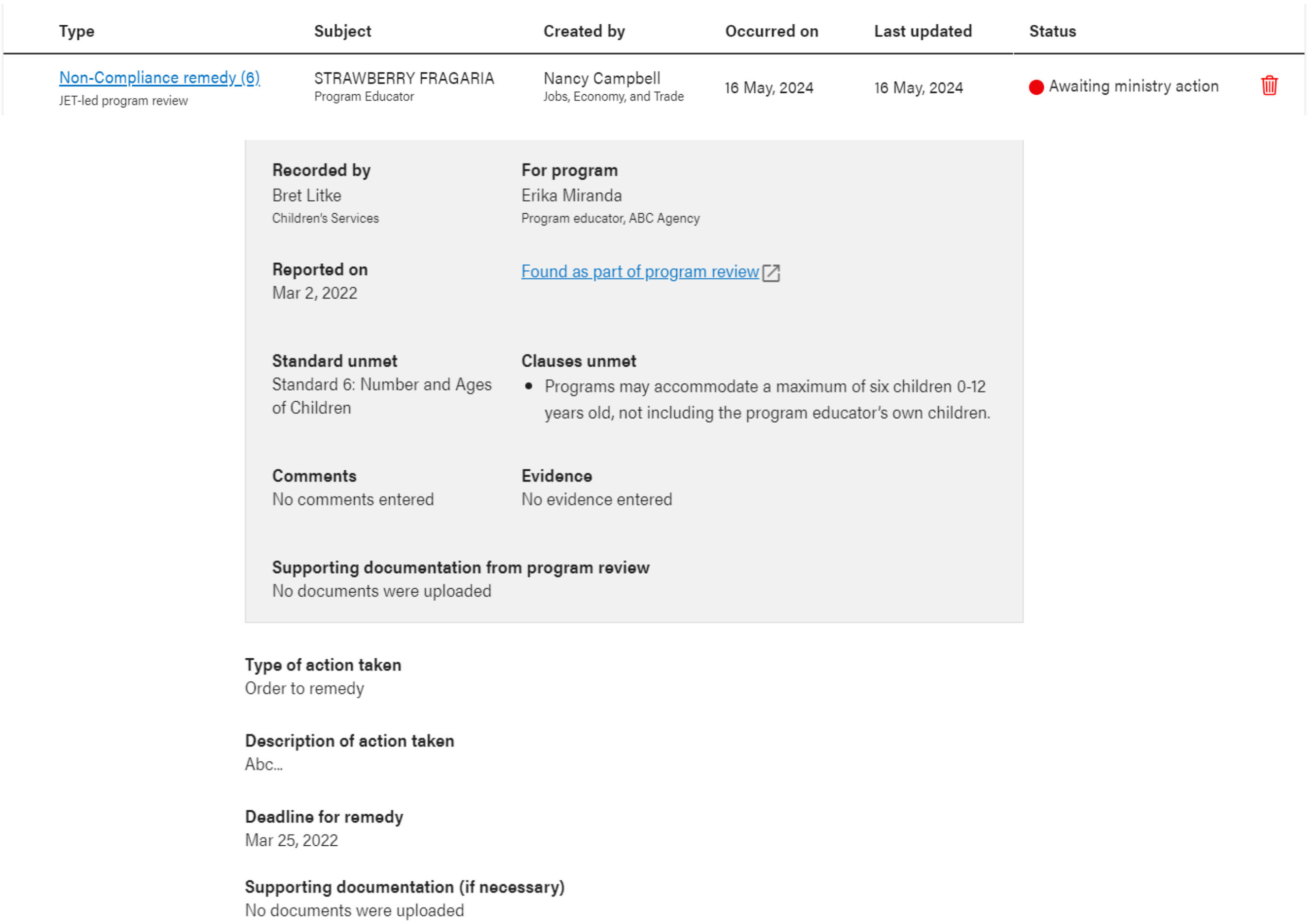
Select your local printer if printing a paper copy or click “Microsoft Print to PDF” to download a PDF copy.

3.5.4 – Non-compliances found by Jobs, Economy and Trade

Here is a training video to assist with completing this activity.

Non-compliance activities are generated by program reviews. This section will cover non-compliances that are found as a result CS-led program reviews.

After a program review is submitted, any non-compliances found are created as activities in the *notes & activities* tab. You can view the details of a non-compliance activity by clicking “View”.



For non-compliances found by CS, they will typically follow this path to being remedied, tracked through statuses:

1. Awaiting ministry action (visible only by your Licensing Officer)
2. Awaiting agency to remedy
3. Addressed, ready for ministry review
4. Remedied

This process is documented below.

Awaiting ministry action

The initial status for all CS-discovered non-compliances is awaiting ministry action. This means that additional information from the Licensing Officer is required before it can be assigned to your agency for follow-up.

Once the Licensing Officer has entered all of the necessary information, including a deadline for remedy, they will assign the non-compliance to your agency, buy changing its status to awaiting agency to remedy.

Awaiting agency to remedy

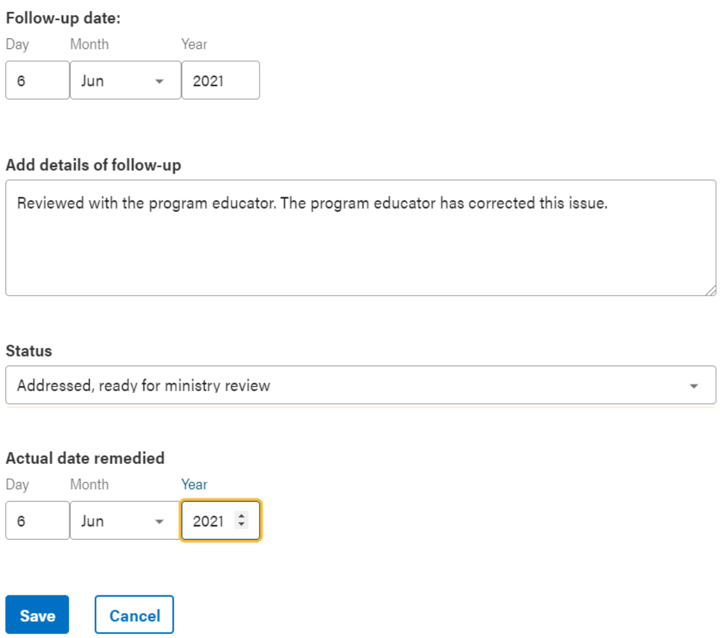
The non-compliance will now have the status of awaiting agency to remedy, which displays on the program educator's *notes and activities* tab. This lets you know that it is ready to be remedied.

Type	Created by	Occurred on	Last updated	Status ↑
Non-Compliance remedy (4A) Agency-led program review	Gandolf Davidson FOREST FLOOR FAMILY DAY HOME AGENCY	04 Mar, 2024	04 Mar, 2024	Awaiting agency to remedy
Program Review Agency-led program review	Gandolf Davidson FOREST FLOOR FAMILY DAY HOME AGENCY	20 Jan, 2024	04 Mar, 2024	No further action

You will use the follow-up and comments feature within the non-compliance activity to record your progress and eventually assign it back to your licensing officer for review.

You can also click "Update" and then "click to upload" to upload any files or images in relation to the non-compliance. This could include photo evidence of a remedy, if applicable.

When your agency has remedied the non-compliance, click "View" to open the non-compliance activity, and then click "Add follow-up".



Enter the follow-up date, the details of the follow-up, change the status to addressed, ready for ministry review, and then enter the actual date remedied. Click save to complete the follow-up.

Addressed, ready for ministry review

The non-compliance now has a status of addressed, ready for ministry review. This tells the licensing officer that the non-compliance is ready for review. They will view your follow-up(s) and any other documentation you have sent them.

Type	Created by	Date created	Last updated	Status ↑	
Non-compliance remedy (6)	Bret Litke	Jun 30, 2021	Sep 17, 2021	Addressed, ready for ministry review	View

If the non-compliance is not fully remedied, they may change the status of the non-compliance back to awaiting agency to remedy. Repeat the steps above to complete additional follow-ups and change the status back to addressed, ready for ministry review.

If your agency has successfully remedied the non-compliance, the Licensing Officer will update the status of the non-compliance to "Remedied".

Remedied

Type	Created by	Date created	Last updated	Status ↓	
Non-compliance remedy (2)	Bret Litke	Jun 16, 2021	Sep 17, 2021	Remedied	View

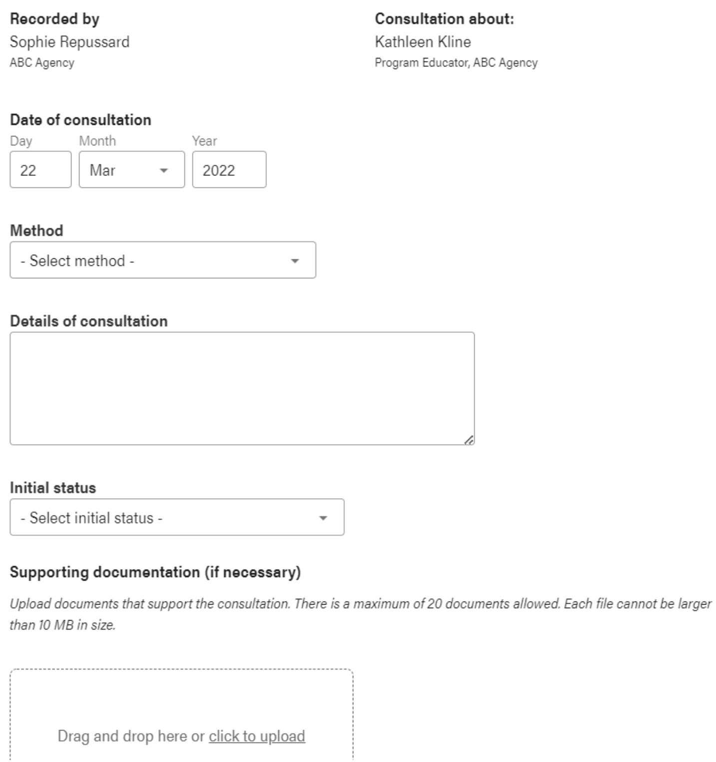
The non-compliance will now appear as remedied. Only CS can change a CS-discovered non-compliance to a remedied state. No further action is required for a remedied non-compliance, but comments can be made on the activity if required.

3.5.5 – Consultations

If you would like to record a consultation that you had with your program educator, specifically regarding the program educator and not the agency as a whole, you can record it on this tab.

On the *notes & activities* tab, click “Add New Activity”, then select “Consultation”, and click “Continue”.

Enter the date of consultation, the method (phone/email/in-person), the details of the consultation, and the status.



The status of the consultation is simply whether or not any follow-up is required. The two status’ you can select are:

- **No further action –** The consultation is completed and the matter concluded. No follow-up is required.
- **Follow-up required –** The consultation has occurred, but either your agency or the licensing officer feels the need to follow-up on the matter in the coming days. The consultation is marked with this status to indicate that more work is required.

You can also upload files or images related to the consultation, if necessary, by clicking “click to upload”.

After entering all of the information, click “Save” to complete the add consultation activity.

If the consultation has been marked as **no further action,** the action is completed.

If the status is **follow-up required,** review the next section of this guide for directions on adding follow-ups and comments to an activity.

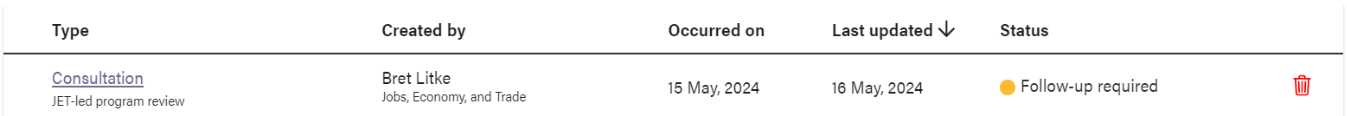
3.5.6 – Follow-ups and comments

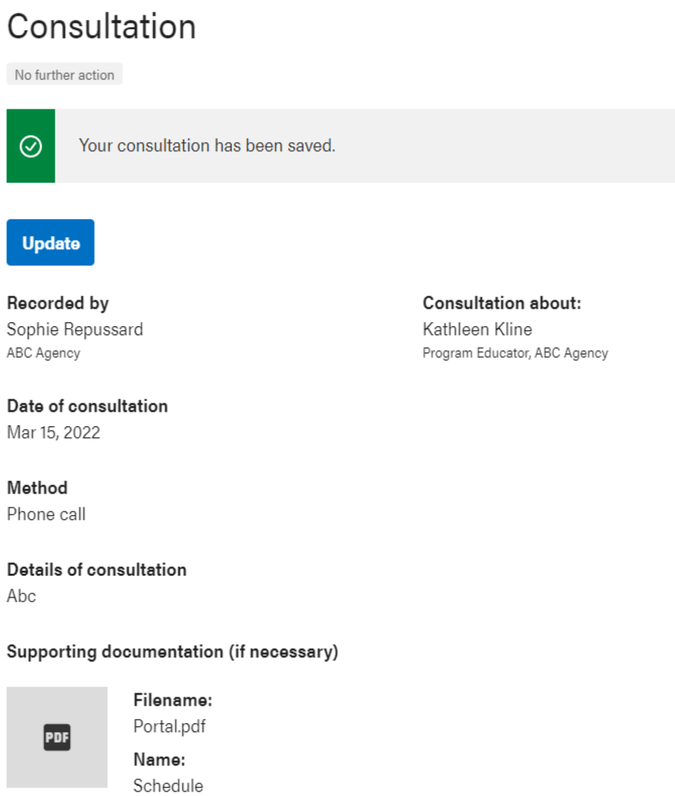
Activities such as consultations and non-compliances have a feature that allows you and the licensing team to follow-up and comment on said activities.

These follow-ups and comments are recorded within the activity section, and allow you to update progress and change the activity's status.

- **Follow-ups –** Typically used to record a follow-up on an activity. For example, visiting an agency following a consultation to resolve an issue.
- **Comments –** Typically used to leave a comment on the activity that hasn't progressed.

To access this feature, click "View" on the activity you would like to comment or follow-up on. In the example below, "consultation" is selected.

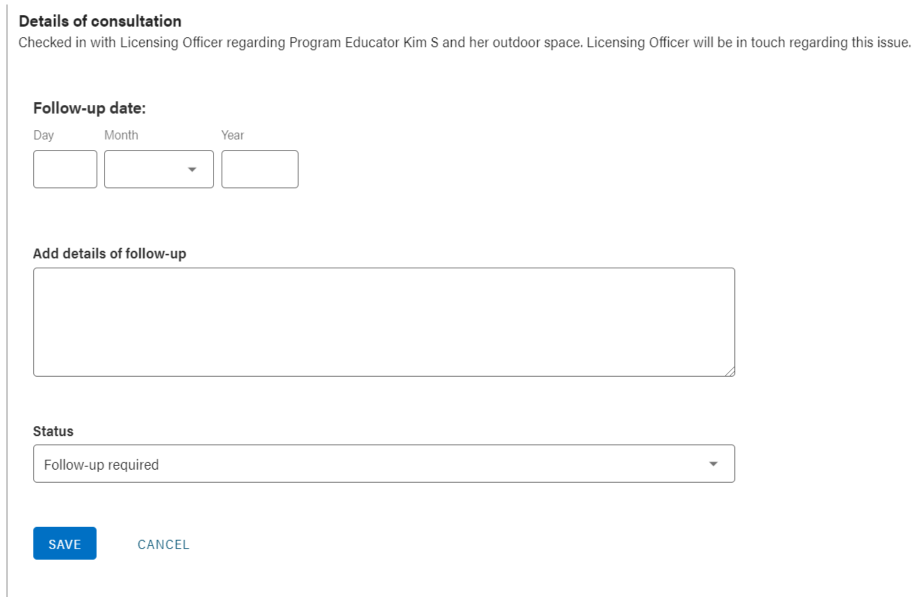




At the bottom of the activity, "Add follow-up" and "Add comment" appear.

Add follow-up

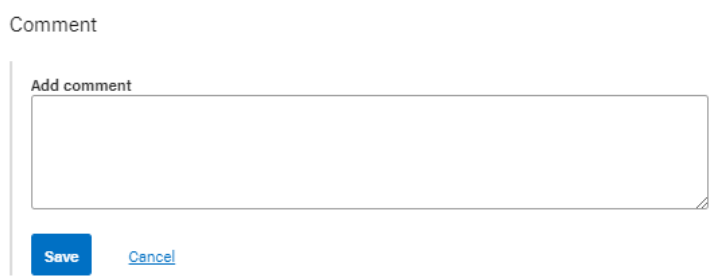
If you select "Add follow-up", fields for the follow-up date, details of the follow-up and status will appear.



Add the date, details of the follow-up, select a status, and then click “Save” to add the follow-up.

Add comment

If you select “Add comment”, a field to add the comment will appear.



Add the comment and then click “Save” to add the comment.

> ***Keeping the status of an activity up to date***
>
> *It is important to remember to update the status of an activity, if necessary, when adding a follow-up. The status helps indicate who needs to work on the activity.*
>
> *For example, if a non-compliance is ready for your ministry to review, it is important to add a follow-up, make note of the detail of that follow-up, and change the status to “Ready for Ministry Review”. This will let your licensing officer know that they need to take action.*
>
> *Additionally, consultations that require follow-up should be marked as “Follow-up required”, and resolved consultations marked “No further action”.*
>
> *Keeping these status’ up to date will ensure a smooth, efficient process for you and your licensing officer.*

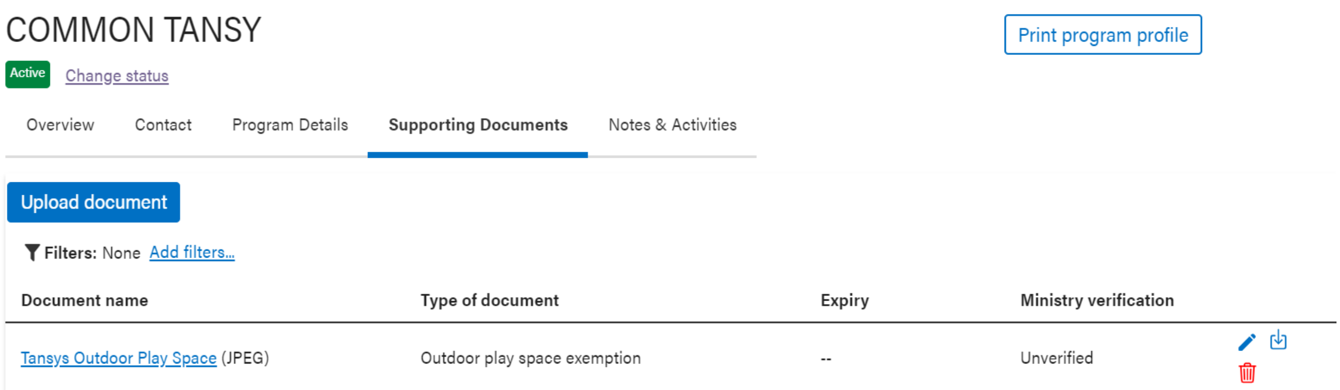
3.6 – Program educator supporting documentation

[Here is a training video to support you in using this feature.]

The *supporting documents* tab on the program educator profile displays supporting documents that you have uploaded for that program educator.

Each document contains a name, type, and expiry date (if applicable).

To view a document, click “Download file”. The file can be viewed after it has downloaded to your device. This usually takes no longer than a few seconds.

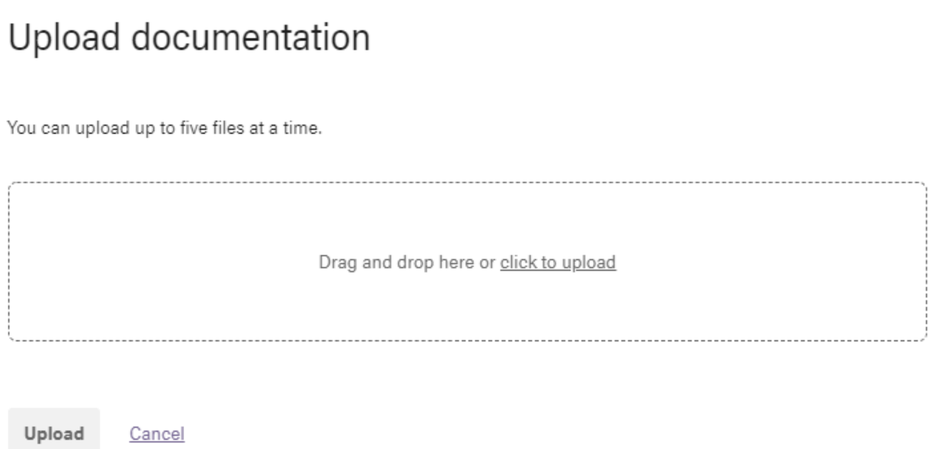


You can sort all columns, either alphabetically or by date, by clicking “Name”, “Type”, or “Expiry”. Clicking a second time will reverse the sort order.

Please note that in order to reveal the “Update” and “Remove” links, you may need to scroll to the right side of the table, using the scroll bar at the bottom of the supporting documents table.

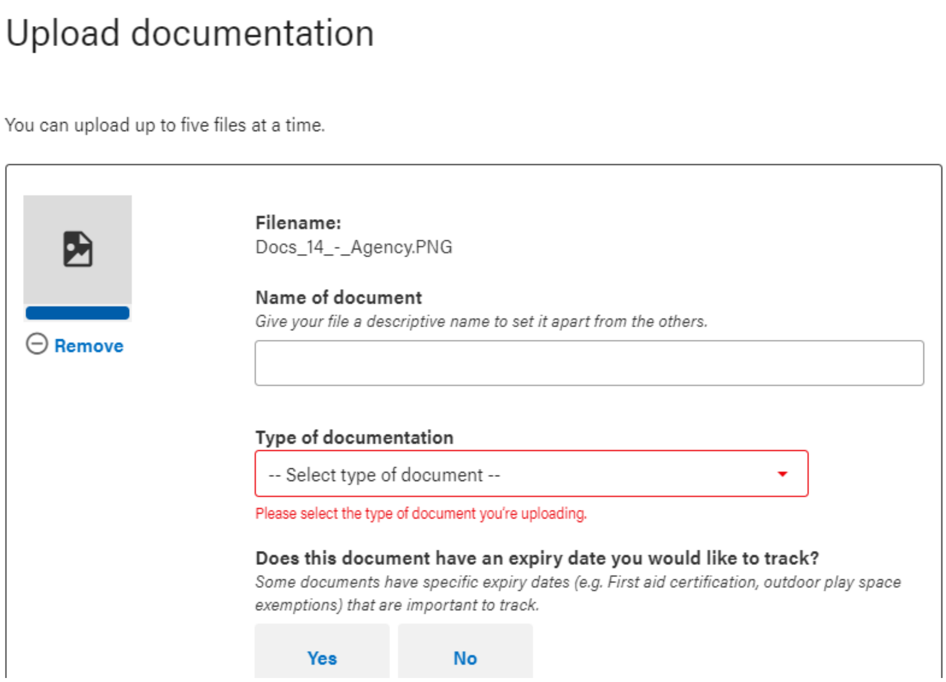
3.6.1 – Uploading a document

To upload a document, click the “Upload Document” button on the *supporting documentation* tab. Then drag or drop up to five files at a time.



The supported file types are PDF, PNG, JPEG, DocX (Microsoft Word), and XLSX (Microsoft Excel). Files must be 10 MB or less.

After you have selected your files, you will need to enter data for each of them.



Enter the following data:

- **Name** – Give your document a name that describes what it is and who it is for
- **Type** – Select the type of document from the drop-down menu.
- **Expiry** – If the document expires, click "Yes" and then enter the date of expiry

The following types of documents are selectable for **program educator** documentation:

> Complaint form, home and safety checklist, incident form, insurance documentation, outdoor play space exemption, performance assessment, sharing of information and acknowledgment form, and training plan.

After you have entered all information, click "Upload" to complete the upload.

3.6.2 – Filter supporting documentation

The list of supporting documents has the potential to get lengthy over time. Use filters to help narrow down what you are looking for.

Click "Add filters" on the *supporting documentation* tab to bring up a list of filters.

You can filter by:

- **Type** - Complaint form, home and safety checklist, incident form, insurance documentation, outdoor play space exemption, performance assessment, sharing of information and acknowledgment form, and training plan
- **Expiry date** - One week from current date, two weeks, one month, or already expired.

After selecting your filters, click "Apply" to view the filtered list.

3.6.3 – Remove a document

To permanently remove a document, click the "Remove" link on the right hand side of the documents table.

You will be prompted to confirm the removal. Please note that this is a permanent removal and cannot be undone.

3.7 – Printable program profile

[Here is a training video on how to use this feature](#).

The printable program profile is a feature that allows your agency to print off a profile for each one of your program educators.

This new program profile combines program educator information that already exists within the portal, while also allowing your agency to add records of other items, such as complaints and incidents.

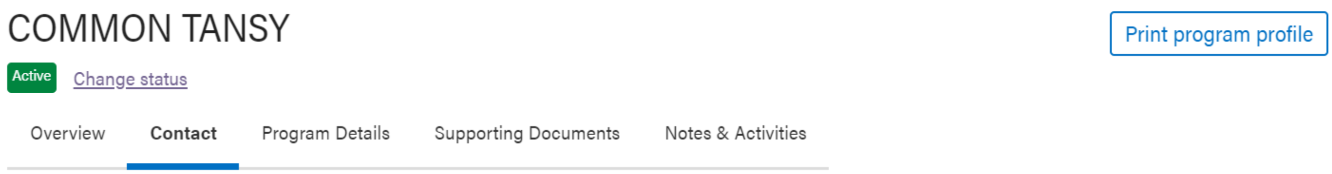
The items you add to this printable profile will be saved and appear each time you access the printable profile, until removed.

The portal's printable program profile is meant to replace, or supplement, the existing "Family Day Home Program Profile" PDF form. The new form has all of the same information as the existing form. This means your agency no longer needs to maintain a profile in the portal and on the PDF form, simply the portal will suffice.

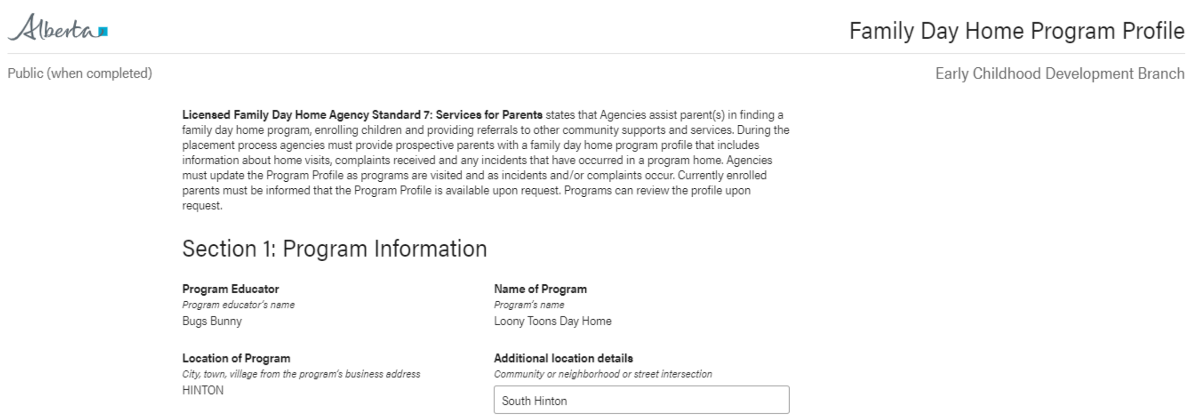
Over time, as more of the program's history is captured within the portal, the printable program profile will completely eliminate use of the PDF form.

3.7.1 - Accessing the printable program profile

To access the printable program profile, navigate to the desired program educator's profile and click the "Print Program Profile" button.



After clicking the button, the printable program profile will open.


Alberta
Family Day Home Program Profile
Public (when completed)
Early Childhood Development Branch

Licensed Family Day Home Agency Standard 7: Services for Parents states that Agencies assist parent(s) in finding a family day home program, enrolling children and providing referrals to other community supports and services. During the placement process agencies must provide prospective parents with a family day home program profile that includes information about home visits, complaints received and any incidents that have occurred in a program home. Agencies must update the Program Profile as programs are visited and as incidents and/or complaints occur. Currently enrolled parents must be informed that the Program Profile is available upon request. Programs can review the profile upon request.

Section 1: Program Information

Program Educator
Program educator's name
Bugs Bunny

Name of Program
Program's name
Loony Toons Day Home

Location of Program
City, town, village from the program's business address
HINTON

Additional location details
Community or neighborhood or street intersection
South Hinton

The printable program profile consists of three sections.

Section 1: Program information

- Contains basic information about the program educator, the program's location, the children and residents in the home, and the program's operating hours
- Populated almost entirely by information already in the portal
- The additional location details field is the only editable field, see below for more information

Section 2: Program Residence

- Contains information about the residence, including pets, outdoor play spaces, menu restrictions, and smoking/vaping status
- None of the fields are editable, as all information derives from the portal

Section 3: Program History for the Previous 12 Months

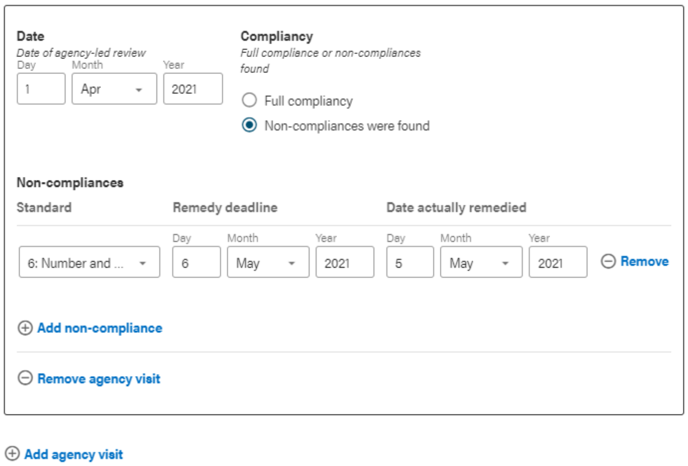
- Contains a history of the program, including agency visits, JET visits, incidents, and complaints
- Agency visits and JET visits that have been added to the portal will automatically appear in this section
- The agency can add historical visits, as well as records of all complaints and incidents at the program

3.7.2 – Editing information in the printable profile

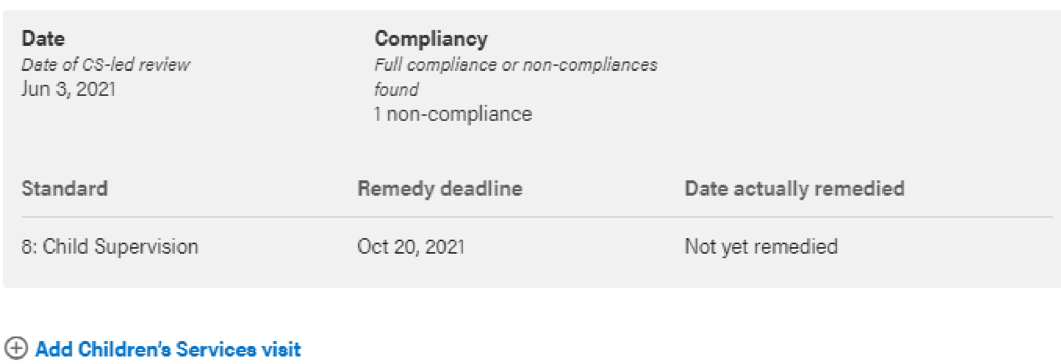
After clicking the “Print Program Profile” button, the editable version of the profile will open. In this state, certain fields can be edited. These include:

Additional location details
This field is located in Section 1. You can indicate additional location details about the program, such as the community it’s in, a nearby intersection, or the neighborhood.

Agency visits
Any visits that your agency records through the agency-led program review activity will automatically appear in this section.



JET visits
Any visits that your Licensing Officer records through the Children’s Services program review activity will automatically appear in this section.

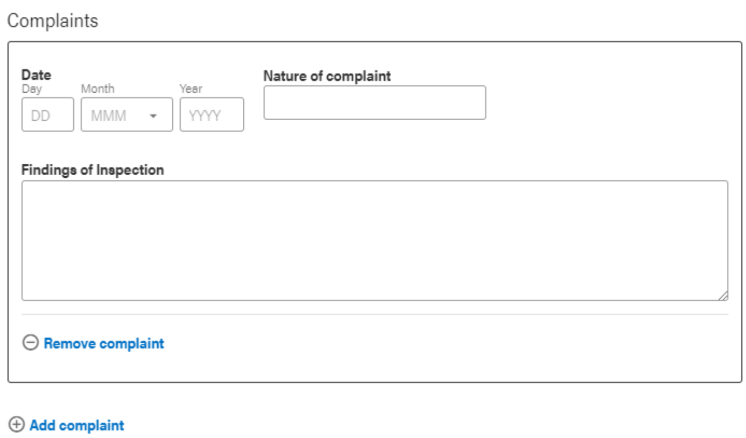


Incidents
Similar to how the PDF program profile worked, your agency can now make a record of an incident on the printable program profile. **This will replace the need to make a record on the old PDF form.**

To add an incident, click “Add incident” in Section 3 and enter the incident date, the type of incident, and the findings of inspection.

Complaints
Similar to how the PDF program profile worked, your agency can now make a record of a complaint on the printable program profile. **This will replace the need to make a record on the old PDF form.**

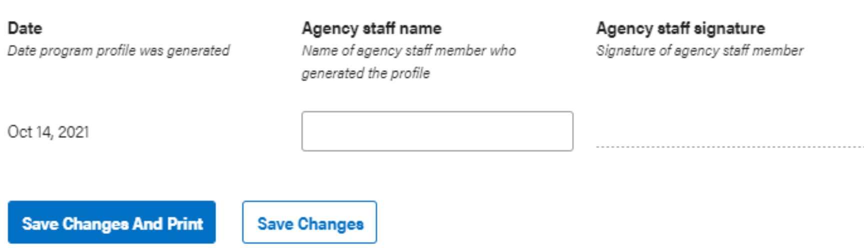
To add a complaint, click “Add complaint” in Section 3 and enter the complaint date, the nature of complaint, and the findings of inspection.



Agency staff name
At the end of the form, you can type in the name of the agency staff printing the form. This is optional.

3.7.3 – Saving and printing the profile

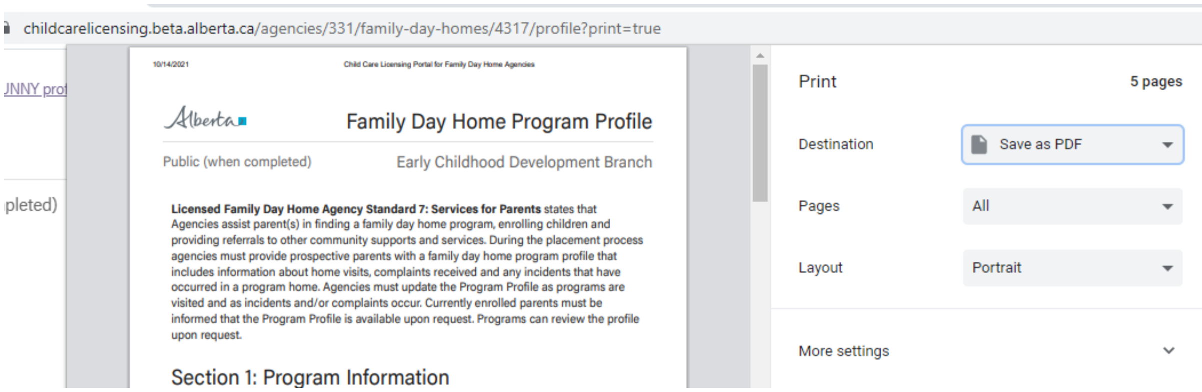
There are two buttons at the end of the form.



Save Changes
The save changes button will simply save any edits you have made to the printable profile, but not print the profile itself. This is useful after adding a record of a complaint or incident, when there is no need to print the changes.

Save Changes and Print
This button will not only save any edits you have made to the form, but it will also prompt the print page screen.

On this screen, you can set the “Destination” to a local printer to print the profile, **or set the “Destination” to “Save as PDF” to save a copy of the profile to your computer.**



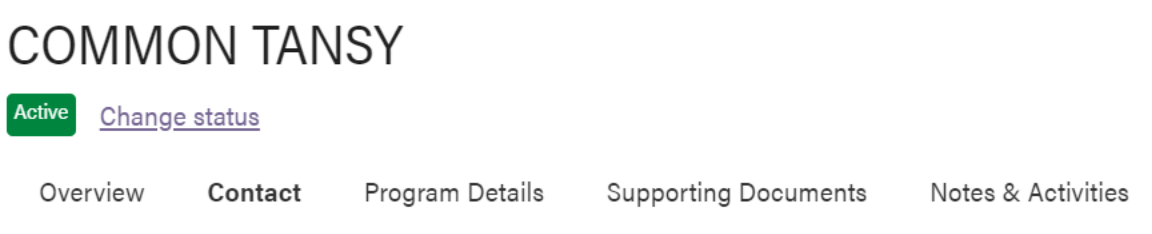
3.8 – Program educator status

A program educator profile can have six different possible statuses: **active, pending approval, inactive – on vacation, inactive – under investigation, inactive – on leave, and pending removal.** They are as follows:

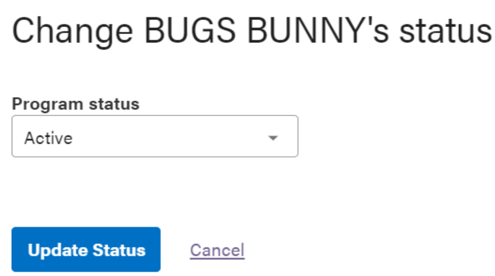
- **Active –** This status is for active program educators. This means that all of the required information is on their profile, and they are currently caring for children.
- **Active – No attending children** – This status is for active program educators, but who have no children listed in the system on the *program details* tab. The system automatically sets this status if there are no children listed.
- **Pending approval –** This status is commonly used for newly added program educators. This status should be used when the program educator is in the process of joining the agency, but has not yet started caring for children.
- **Inactive – on vacation –** This status is for program educators who are taking an extended vacation and are not currently caring for children, but will be after their vacation.
- **Inactive – under investigation** – This status is for program educators who are currently under investigation by the agency and are not currently caring for children.
- **Inactive – on leave –** This status is for program educators who are currently taking a leave from work and not caring for children, but who are expected back at some point.
- **Pending removal –** This status is for program educators who have left the agency, and started working at a new one. This status is automatically set when the new agency activates them, and allows the old agency to add any remaining notes before removing them.

As the agency, you are responsible for keeping each program educator’s status as up-to-date and accurate as possible.

To change a program educator’s status, go to their profile and click “Change status” which is located next to their name.



Click the box under “Program status” and select the appropriate status. Then click the “Update Status” button to complete the change.



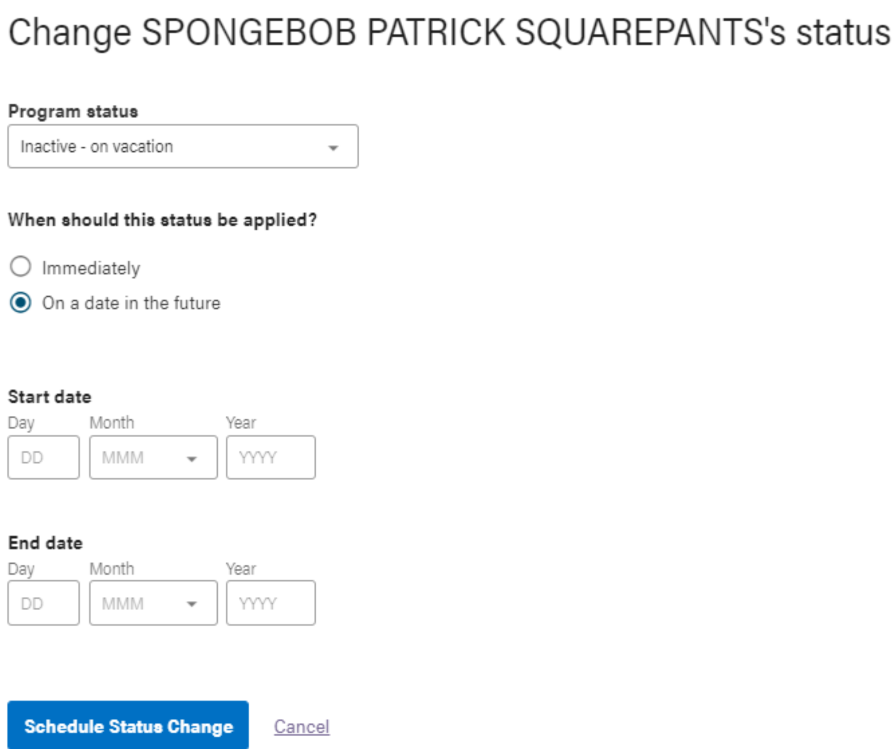
In order to designate a program educator as **active**, all mandatory information fields on their profile must be completed. If there is any missing information, an alert will appear on the educator profile highlighting the missing information.

Please refer to this section of the guide on how to update program educator profile information.

3.8.1 – Scheduling a future status for a program educator

If one of your program educators will be on vacation or on leave for a set period of time, you can schedule this status change ahead of time. This will help your Licensing Officer schedule their visits to your programs.

On the program educator profile, click “Change status”. The select either “Inactive – on vacation” or “Inactive – on leave”.



Now select if the change is happening immediately or on a date in the future. If it is in the future, you will be able to schedule a start and end date. After entering the dates, click “Schedule Status Change”.

The system will automatically update to the new status for the selected date range, and revert after it is over.