
OCCMS Operators User Manual

Peel Region EarlyON Service Providers

Table of Contents

PURPOSE	3
ACCESSING OCCMS	3
User Permissions.....	3
New Users.....	4
Password.....	4
OCCMS-Operators Web Link	4
Signing in to OCCMS-Operators.....	5
Email Activation and Confirmation.....	6
Manage Account Settings	7
EARLYON-OPERATORS MENU	8
PARTICIPANTS	9
Adding Participants.....	9
Adding a New Group.....	10
Editing or Deleting Participants.....	11
Exporting Participant Data	12
SITE PROGRAM OFFERINGS	13
Adding Program Details	13
Exporting Site Program Offering Data.....	16
CALENDARS	16
Viewing and Filtering Calendars	16

Scheduling Program	17
Change/Update Existing Program	19
Scheduling a Multi Session Program	20
Modifying an existing Pre-Registration and Multi-Session Program.....	20
SITE DEVICES	21
Adding Site Devices	21
Deleting Site Device	22
Resetting Password	23
Logging into Site Device	24
PRE-REGISTRATION LIST	25
Viewing Pre-Registration List.....	25
Filtering and Sorting the Pre-Registration List	26
Exporting the Pre-Registration List.....	26
ATTENDANCE	27
Exporting Attendance to Excel	28
POSSIBLE DUPLICATES	28
REPORTS	29
Report Types	29
Accessing the Reports	30

Purpose

Ontario Child Care Management System (OCCMS)-Operators is used by EarlyON service providers and is accessible to Peel Region.

This tool allows EarlyON service providers to manage information about EarlyON participants, schedules/calendars, and EarlyON attendance.

Peel Region can view information that service providers enter.

Accessing OCCMS

User Permissions

There are two types of user permissions: Head Office Administrator, and Head Office/Site Users.

Head Office Administrators can:

- Add new Head Office Administrators, Head Office Users, and Site Users.
- Reset their staff passwords.
- Add or delete EarlyON participants' information.
- Add or view calendars.
- View pre-registration list.
- Add participants and complete EarlyON attendance.
- Add or edit site devices.
- Add or view EarlyON staff positions information.
- View reports.

Head Office Users/Site Users can:

- Add or delete EarlyON participants' information.
- Reset user passwords.
- Add or view calendars.
- View pre-registration list.
- Complete EarlyON attendance.
- Add or edit site devices.
- Add or view EarlyON staff positions information.
- View reports.

New Users

When added as a new user, you will receive a confirmation email asking you to activate your account. Therefore, the email address field is now mandatory in Version 10.1 when adding new users.

- Click on the **Activate** hyperlink and follow the prompt to create a password.
- With Version 10.1, passwords must be at least eight characters long and they are case sensitive.
- Enter and confirm password.
- Enter your username and password on the sign in page to access your account.

Here is the list of characters that you can use for a username in Version 10.1:

- letters (a-z), numbers (0-9)
- hyphens (-), periods (.)
- underscores (_)
- at signs (@)
- plus signs (+)

Password

- If it is the first time you are using OCCMS-Operators, you will receive a temporary password from your Head Office Administrator.
- Your OCCMS-Operators password is case sensitive and requires a minimum of eight characters.
- Keep your password safe as OCCMS-Operators cannot remember your password.
- If you have forgotten your password, your Head Office Administrator can reset it and provide you with a new temporary password.
- For security purposes, you will be asked to reset your password every few months.
- If you enter your password incorrectly more than three times, you will be locked out of OCCMS-Operators; your Head Office Administrator will need to reset your password and provide you with a new temporary password.

OCCMS-Operators Web Link

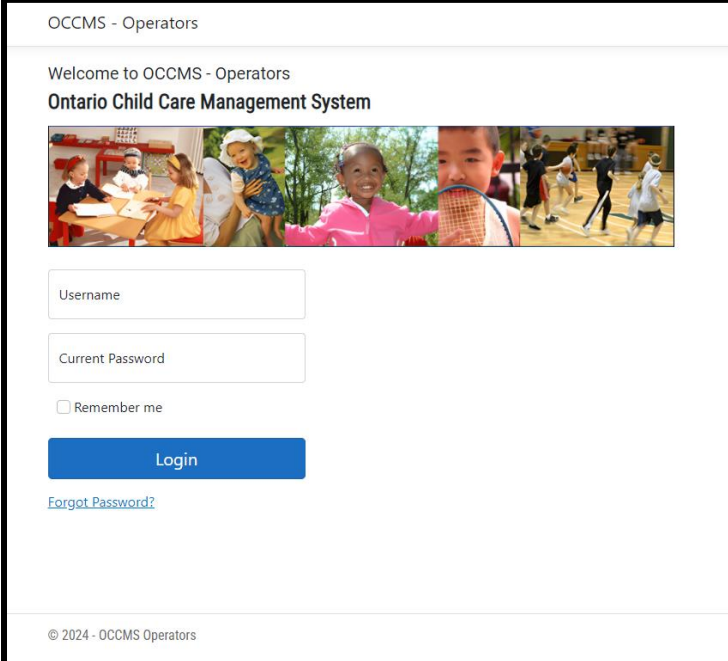
You can find the most updated OCCMS-Operators link on the Peel Region website:
<https://peelregion.ca/children/working/service-providers/#earlyon>.

For quick access to OCCMS-Operators:

- Create a link on your desktop by right-clicking anywhere in the Sign In screen.
- Save the link in your Bookmarks/Favourites folder.

Signing in to OCCMS-Operators

1. Double-click on the **OCCMS-Operators web link**.



OCCMS - Operators

Welcome to OCCMS - Operators
Ontario Child Care Management System

Username

Current Password

Remember me

Login

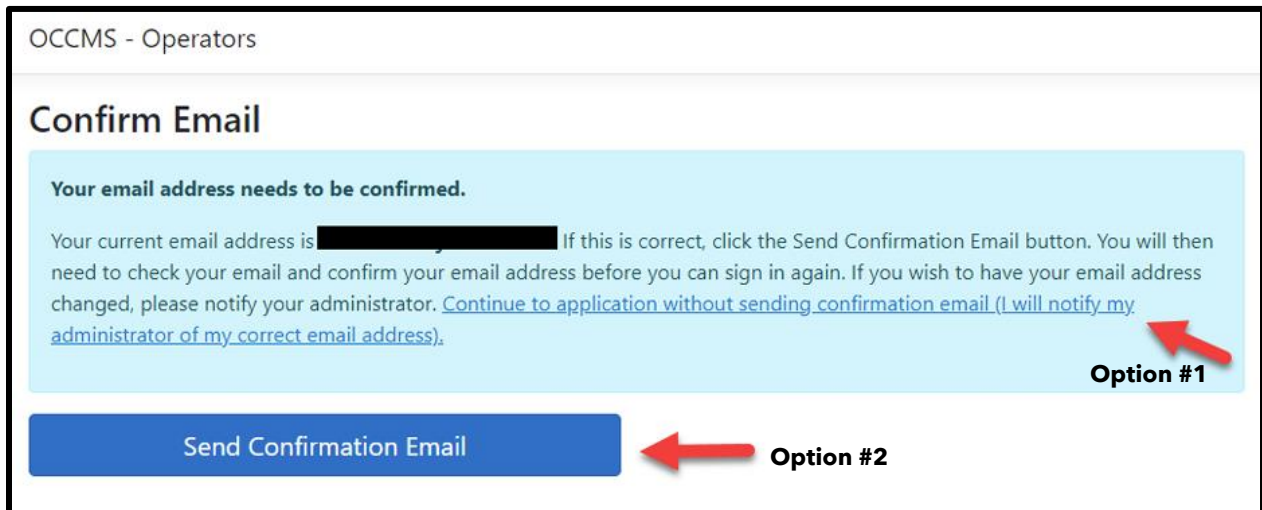
[Forgot Password?](#)

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2. In **Username** field, enter the Username assigned to you. This will be your last name and first initial. For example, Michelle Obama's username would be obamam.
3. In the **Password** field, enter your password.
4. If this is your first-time logging into OCCMS-Operators:
 - a. Enter the temporary password assigned to you in the password field.
 - b. Click **Sign In**.
 - c. Enter a **New Password** and re-type it in the **Verify Password** field. Please note that all passwords are case sensitive and require a minimum of eight characters.
 - d. Click **Sign In** again and follow the sign in process.

Email Activation and Confirmation

- **New:** OCCMS-Operators now requires users to activate or verify their email addresses.
- Existing users will be required to confirm their email address. This will be prompted when signing in to OCCMS operators. Users will be sent an email confirmation link. Head Office Administrators can resend the email confirmation link, if required.
- To resend an email activation or confirmation link:
 - Select **Admin** and **Users**.
 - Search for the user you would like to send a link to.
 - Select the three dots on the left of the user and select **Resend Confirmation Email**.
- **Note:** Users will receive the following message at every sign in attempt until the email address is confirmed by the user.



OCCMS - Operators

Confirm Email

Your email address needs to be confirmed.

Your current email address is [redacted]. If this is correct, click the Send Confirmation Email button. You will then need to check your email and confirm your email address before you can sign in again. If you wish to have your email address changed, please notify your administrator. [Continue to application without sending confirmation email \(I will notify my administrator of my correct email address\)](#).

Option #1

Send Confirmation Email

Option #2

- **Option #1:** Continue to application without sending confirmation email (I will notify my administrator of my correct email address) hyperlink.

You will be able to sign into your account. It is recommended that you confirm your email as soon as possible so that you can take advantage of the account [self-management](#) features, such as requesting a password reset through your own user profile.

- **Option #2:** Send Confirmation Email

A confirmation of email address email will be sent to the email address associated with your account. You will not be able to access your account until

you confirm your email address. You will receive a confirmation email with a hyperlink to confirm your email address.

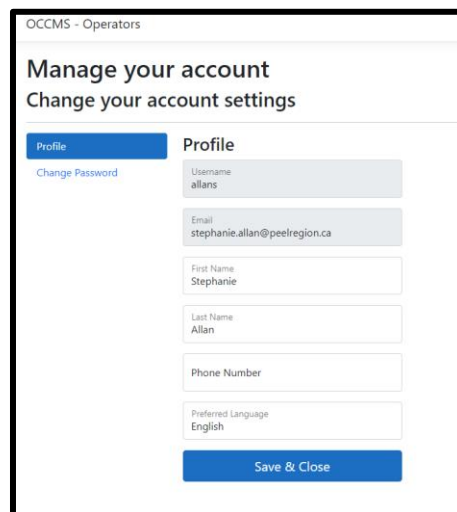
Manage Account Settings

New: Users in OCCMS-Operators can now update some elements of their account.

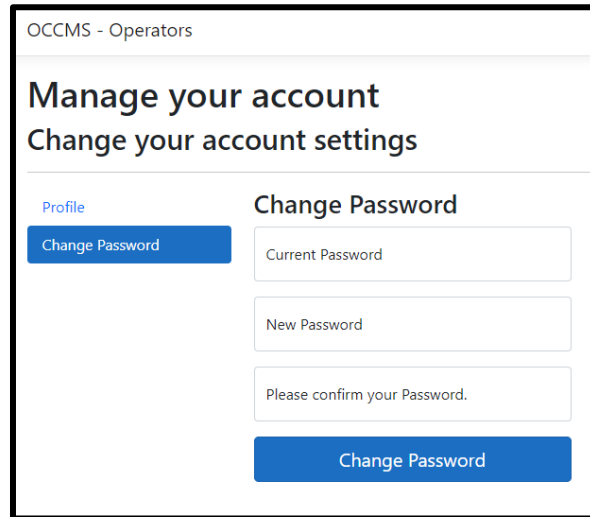
1. On the OCCMS homepage, select your account name at the top right of the screen (next to Log Out).



2. On this page, you can update information including first name, last name, phone number and preferred language. Note that users cannot change their username and email address.



- Users can also change their account passwords. Select **Change Password** on the left of the screen, input your current password, then enter and confirm a new password. Note that Head Office Administrators will still need to reset and provide new temporary passwords if a password is forgotten.



OCCMS - Operators

Manage your account

Change your account settings

Profile

Change Password

Current Password

New Password

Please confirm your Password.

Change Password

EarlyON-Operators Menu

Log in to OCCMS-Operators as the Head Office Administrator.



OCCMS - Operators

legaspid | Log out

Attendance

EarlyON

Messages

Admin

Help

Welcome to OCCMS - Operators



Ontario Child Care Management System

Click **EarlyON** on the left of the screen, and the following menu options will appear:



- Participants
- Possible Duplicate Adults - **New**
- Possible Duplicate Children - **New**
- Site Program Offerings
- Calendars
- Pre-Registration
- Attendance
- Site Devices
- Staff Positions (this feature is not used in Peel)
- Reports

Participants

Adding Participants

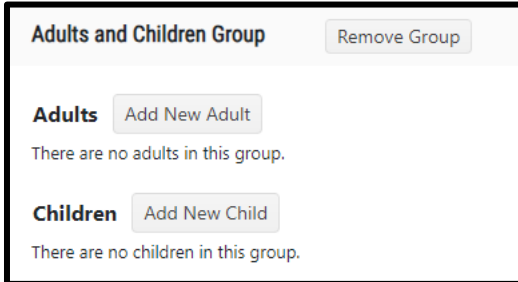
1. Select EarlyON menu, **Participants**.
2. Select **Add New Adult** button in the top left corner.
 - Enter information in the mandatory fields marked with an asterisk (*).
 - Note that pronoun is no longer a mandatory field.
 - Enter information in the remaining fields and checkmarks where applicable.
 - Click **Save** to save the information added.

- Once you have clicked save, the **Add New Group** option will be available as a new button at the bottom of the screen - enter children or additional adults to be grouped with this participant.
- If you have no group to add, select **Save and Close**. To add a new group, follow the steps below.

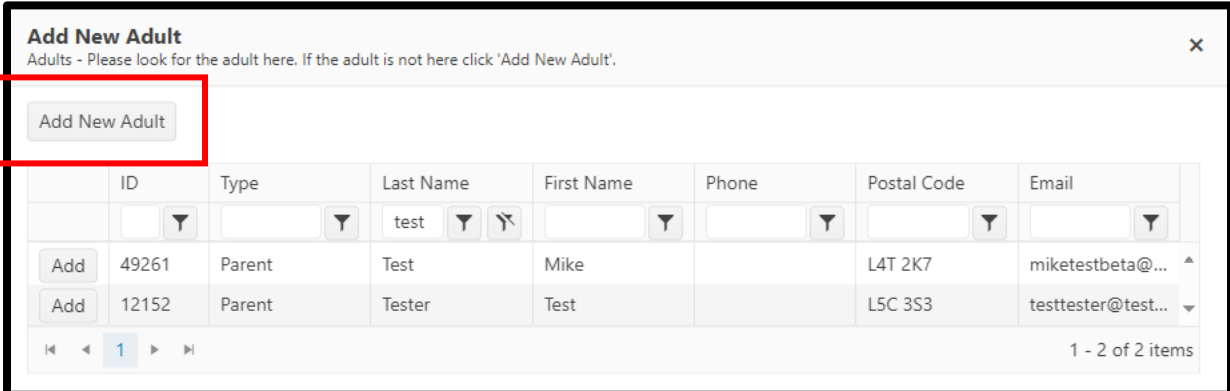
Adding a New Group

You can enter children or additional adults to be grouped with participants in OCCMS. To do this, follow the below steps:

1. Click the **Add New Group** button.
2. Click the **Add New Adult** or **Add New Child** button.



3. Search for adult or child by last name, first name, or other search options:



ID	Type	Last Name	First Name	Phone	Postal Code	Email
Add	49261	Parent	Test	Mike	L4T 2K7	miketestbeta@...
Add	12152	Parent	Tester	Test	L5C 3S3	testtester@test...

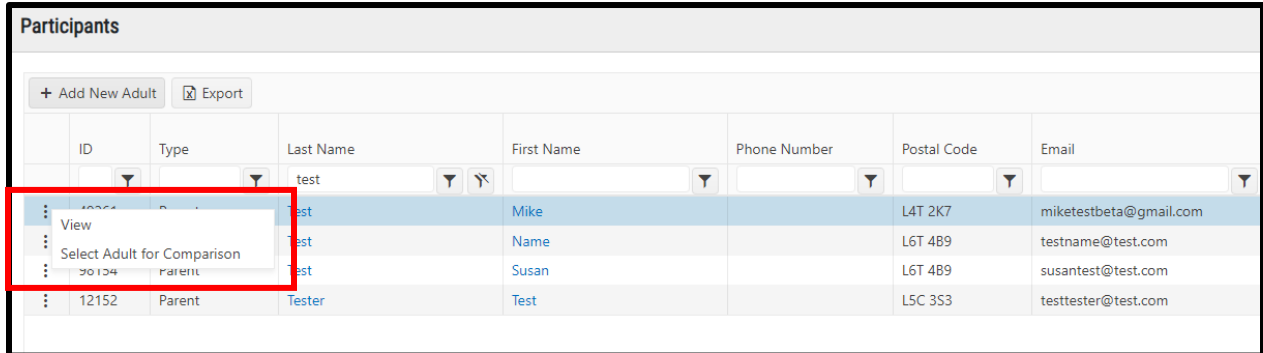
4. If this is a new adult or child, click the **Add New Adult** or **Add New Child** button and enter information in the mandatory fields marked with an asterisk (*). Enter information/checkmarks in the remaining fields where applicable.
5. Click **Save** to add the new adult or child to the group.

- Once the group is complete, select and **Save and Close**.

Editing or Deleting Participants

Editing

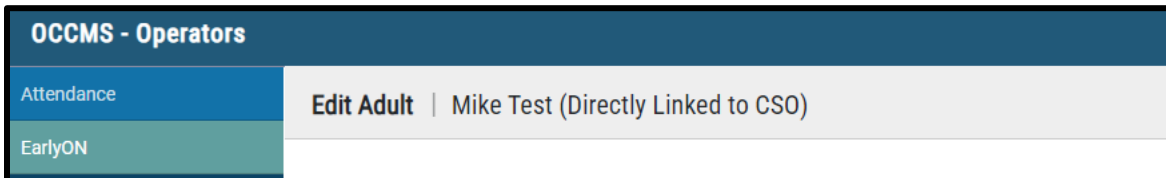
- In the Participants list, select the three dots on the left side of the screen and then choose **View**. Edit the participant information as required.



ID	Type	Last Name	First Name	Phone Number	Postal Code	Email
12152	Parent	Tester	Test		L5C 3S3	testtester@test.com
		test	Mike		L4T 2K7	miketestbeta@gmail.com
		test	Name		L6T 4B9	testname@test.com
		test	Susan		L6T 4B9	susantest@test.com

- Click **Save**.

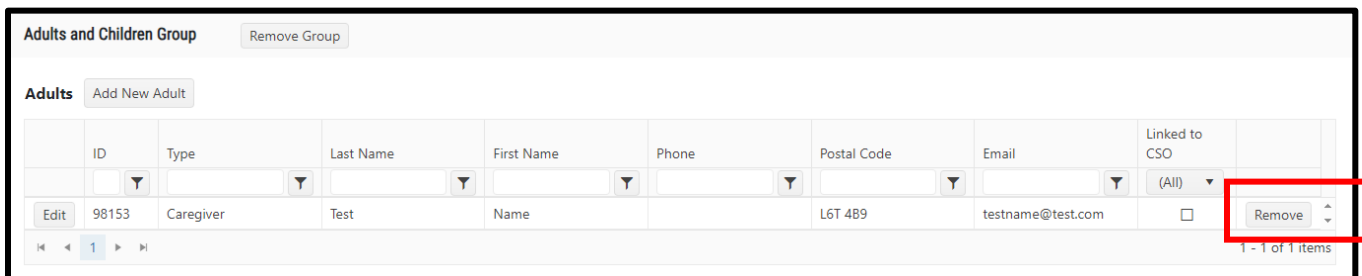
Note: Participants that have “directly linked to CSO” after their names in the View page (see below for example) are user-created accounts and cannot be modified by Peel Region or by EarlyON provider staff.



OCCMS - Operators	
Attendance	Edit Adult Mike Test (Directly Linked to CSO)
EarlyON	

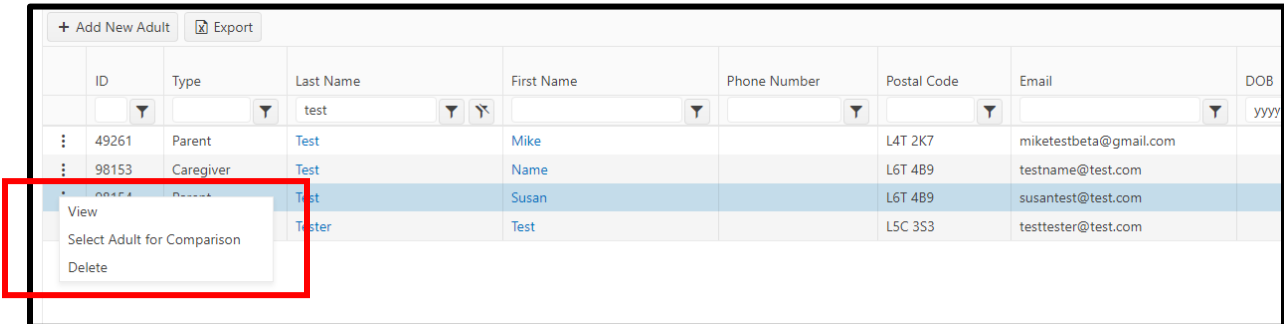
Deleting

- On the participant information page, scroll down to Adults and Children Group. Click the **Remove** button beside the adult or child row:



ID	Type	Last Name	First Name	Phone	Postal Code	Email	Linked to CSO	
98153	Caregiver	Test	Name		L6T 4B9	testname@test.com	<input type="checkbox"/>	Remove

2. A Popup will appear "Are you sure that you want to remove this participant from this group?"
3. Click **OK** and the adult or child selected will no longer be displayed in the selected group.
4. The adult(s) and child(ren) removed from the group(s) will still show in the ongoing People/Participants list, but they can be removed from this list by clicking the three dots on the left of the participant and selecting **Delete**.



ID	Type	Last Name	First Name	Phone Number	Postal Code	Email	DOB
49261	Parent	Test	Mike		L4T 2K7	miketestbeta@gmail.com	
98153	Caregiver	Test	Name		L6T 4B9	testname@test.com	
98154	Parent	Test	Susan		L6T 4B9	susantest@test.com	
12152	Parent	Tester	Test		L5C 3S3	testtester@test.com	

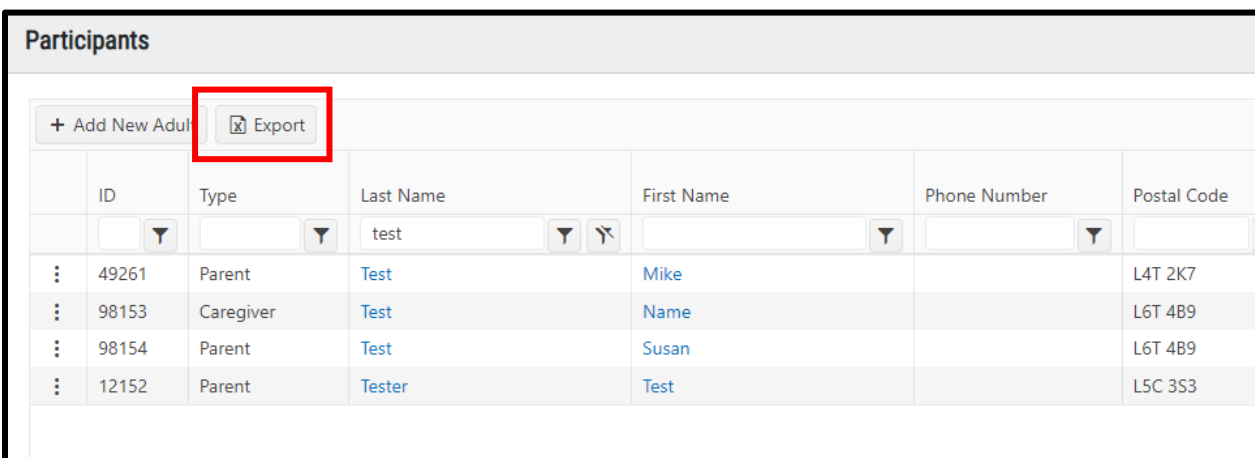
Context menu for ID 98154:

- View
- Select Adult for Comparison
- Delete

Important: Participants who have attended an EarlyON Program Offering once cannot be deleted from the Participants list.

Exporting Participant Data

New: Data from the participants list can now be exported to Microsoft Excel. To export data, select the Export button at the top of the screen. The Microsoft Excel file will be added to your downloads to access.



ID	Type	Last Name	First Name	Phone Number	Postal Code
49261	Parent	Test	Mike		L4T 2K7
98153	Caregiver	Test	Name		L6T 4B9
98154	Parent	Test	Susan		L6T 4B9
12152	Parent	Tester	Test		L5C 3S3

Site Program Offerings

The Site Program Offerings menu stores all programs for EarlyON sites.

Adding Program Details

Once the program is populated by Peel Region staff, EarlyON providers can determine how their program is delivered and the number of participants:

1. Select EarlyON menu
2. Select **Site Program Offerings**



The programs available for this EarlyON provider appear on this screen.

Site Program Offerings									
<input type="checkbox"/> Export									
	Name English	Description English	Name French	Description French	CCC	Capacity Building Event	Pre-Registration Required	Max Participants	Virtual
					(All)	(All)	(All)		(All)
⋮	Adventures in Math and ...	Experimental learning is so much f...	n/a	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>
⋮	Adventures in Math and ...	Experimental learning is so much f...	n/a	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input checked="" type="checkbox"/>

3. Select the three dots to the left of the program offering you would like to view or edit. The row you have selected will be highlighted in blue. Click on **View** to access program details and edit program information.

Site Program Offerings									
Export									
Name English	Description English	Name French	Description French	CCC	Capacity Building Event	Pre-Registration Required	Max Participants	Virtual	
				(All)	(All)	(All)		(All)	
⋮	Adventures in Math and ...	Experimental learning is so much f...	n/a	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>
View	Adventures in Math and ...	Experimental learning is so much f...	n/a	n/a	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	<input type="checkbox"/>

The program name description and age group are populated by Peel staff and appear as read only. The site associated with this program is indicated at the top of the screen, next to **Edit Program**.

New: Public (will be shown on EarlyON calendar): Peel staff can now make a program private. A private program will not show on the EarlyON calendar in InfoPeel. Any requests for private programs should be made when submitting a new program addition request to the Peel EarlyON team.

Edit Program | CDRCP Online EarlyON

Name English: Adventures in Math and Science (CDRCP)

Description English: Experimental learning is so much fun! We invite you to be curious about how your little one explores and gets creative with these S.T.E.A.M activities (Science, Technology, Engineering, Art, Math). Encourage your children to exercise their critical thinking skills to better understand the world around them.

Name French: n/a

Description French: n/a

Completed by Peel staff

Age Group: 1 to 6 years of age

Maximum # Participants: 0
Leave 0 if there is no Maximum.

Public (will be shown on EarlyON calendar)

Capacity Building Event

Customized Community Connection

Virtual

Pre-Registration Required

Multiple Sessions

Adults Only

Completed by EarlyON Providers

You will complete the following remaining fields:


- **Customized Community Connection:** Selected to capture customized community connection programs for reporting purposes. Please ensure that this is selected for all programs funded under the Customized Programs Fund.
- **Pre-Registration Required:** When selected, participants must pre-register through their Children's Services account for the program.
- **Adults Only:** These programs are meant for parents and caregivers. They can be attended with or without children.
- **Capacity Building Event:** Selected to capture capacity building events for reporting purposes. This function is not typically used in Peel.
- **Virtual:** When checked, means that the program is not in person and is offered online.
- **Multiple Sessions:** This is used when a program has a series of sessions. It ensures that families who register for the program can register for all sessions in the series at once.
 - **Important:** this feature is different than scheduling a repeat program. To use this feature, it requires a fixed series start date and fixed series end date and can only be used for pre-registered programs.
- **Maximum Number of Participants:** Allows EarlyON providers to control the maximum number of participants attending a program. It can be left at zero if there is no maximum.

Once you have completed the required fields, you can select either **Save** or **Save & Close**. If you select cancel to go back no updates will be saved.

Important: These changes will only take affect for future programs. Any existing programs that have been scheduled in the calendar will not be affected by these changes. It is recommended that all selections are completed prior to scheduling.

Exporting Site Program Offering Data

New: You can now export data from the Site Program Offerings list to Microsoft Excel. To export data, select the **Export** button at the top of the screen. The Microsoft Excel file will be added to your downloads to access.

Site Program Offerings						
						
	Name English	Description English	Name French	Description French	CCC	Capacity Building Event
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	(All)	(All)
⋮	Art and Sensory Explorati...	Program begins with sensory expl...	n/a	n/a	<input type="checkbox"/>	<input type="checkbox"/>
⋮	Art and Sensory Explorati...	Program begins with sensory expl...	n/a	n/a	<input type="checkbox"/>	<input type="checkbox"/>
⋮	Art and Sensory Explorati...	Program begins with sensory expl...	n/a	n/a	<input type="checkbox"/>	<input type="checkbox"/>

Calendars

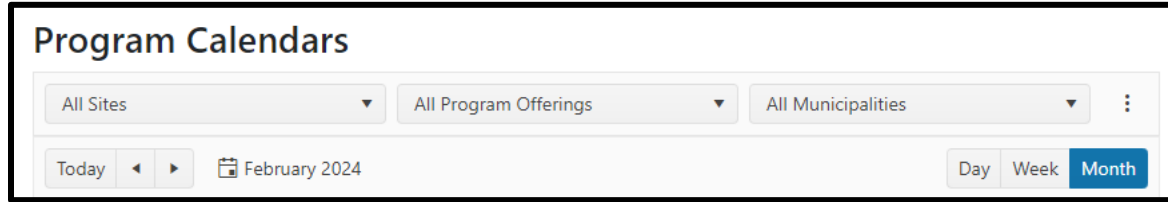
Viewing and Filtering Calendars

All EarlyON users have access to schedule, edit and delete programs in the calendar. However, you can only view sites associated with your head office.

1. Select EarlyON menu
2. Select **Calendars**. The view defaults to the current monthly schedule:

Program Calendars						
All Sites						
All Program Offerings						
All Municipalities						
Today						
February 2024						
Day Week Month						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29 Family Time Baby	30 Family Time	31 Family Time	01 Family Time	02 Family Time	03 Family Time
04	05 Family Time	06 Family Time	07 Family Time	08 Family Time	09 Family Time	10 Family Time
11	12 Family Time	13 Family Time	14 Family Time	15 Family Time	16 Family Time	17 Family Time
18	19	20 Family Time	21 Family Time	22 Family Time	23 Family Time	24 Family Time
25	26 Family Time	27 Family Time	28 Family Time	29 Family Time	01 Family Time	02
03	04	05	06	07	08	09

3. Filter using the menu:



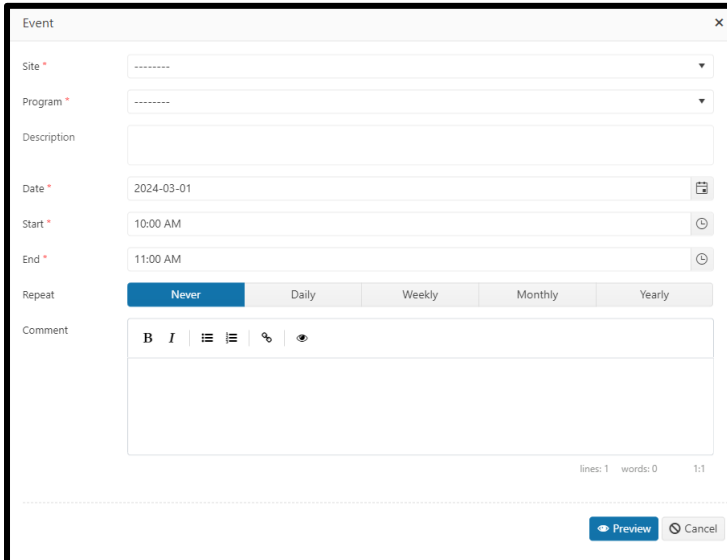
- **All Sites:** Allows user to view site colours and filter by site.
- **All Program Offerings:** Users can filter by selecting the program.
- **All Municipalities:** Filter by the municipality name.
- **Today:** Returns the calendar to the current date.
- **Arrows:** Moves the calendar forward or backward.
- **Day:** Shows the current day only. Select “show full day” at the bottom left to see times outside of business hours.
- **Week:** Shows weekly view.
- **Month:** Shows monthly view.

New: The Agenda view of the calendar has been removed for version 10.1.

Scheduling Program

Programs are added to the schedule by selecting the day or by selecting **Add New Event** at the top left of the Program Calendar screen (new).

1. Double click on calendar day or select **Add New Event**.
2. The Event screen appears:



- **Site:** Dropdown with sites available to schedule.
- **Program:** Dropdown provides programs available at that site.
- **Description:** Auto populates from when the program was created. This can only be edited by Peel Region staff.
- **Date:** The date that program will start. Use the calendar button on the right to select the date within a calendar view.
- **Start:** Time that program will start. Select the hour, minute, and AM or PM.
- **End:** Time that program will end. Select the hour, minute and AM or PM.
 - **New:** For OCCMS 10.1, the date and time fields have been separated.
- **Repeat:**
 - Select **never** for a “one time only” program that will not be repeated (for example, special events, guest speakers).
 - Select **daily** for programs that will be offered every day. Note that using this repeat option will include weekends.
 - Select **weekly** for programs that will repeat on certain days of the week. Note that this defaults to the current day of the week, not the day selected in the program.
 - Select **monthly** for programs that repeat once per month:
 - Select the monthly frequency that the program is to be repeated (for example, every month or every 3 months).
 - Select when the program is to be repeated (specific day of the month, for example, the seventh day, or specific day of the week, for example, the first Tuesday of the month).
 - Select **yearly** for programs that repeat once per year:
 - Select the yearly frequency that the program is to be repeated (for example, every one year or every two years).
 - Select when the program is to be repeated (specific day of the year, for example, seventh day of June, or specific day of the week, for example, the third Wednesday in August).
- **End:**
 - Selecting **never** means that the program will repeat indefinitely with no end date.
 - **New:** Programs with no end date will only occur through to the end of the next calendar year. After that point, providers will need to re-add this program to their schedule. For example, a program added in February 2024 will continue until December 31, 2025 before it needs to be added again.
 - Selecting **after number of occurrences** allows you to select the number of times this program will repeat.
 - Selecting an **end date** allows the user to select the date the program will end. This option is recommended.

- **Comment:** Form field section where you can input and customize additional information (for example, links to virtual programs or other websites or information for families to consider in preparation for an event).
 - **Note:** Editing the comment field is only available for editing the series.
- 3. **New:** Before saving the program, select **Preview**. This allows providers the opportunity to review the program, see how it looks in the calendar, and make any last changes before the program is added. Select **Edit** to make any further changes.
- 4. Once previewed, select **Save and Publish** to populate the calendar.
- 5. The program has now been added to the calendar.

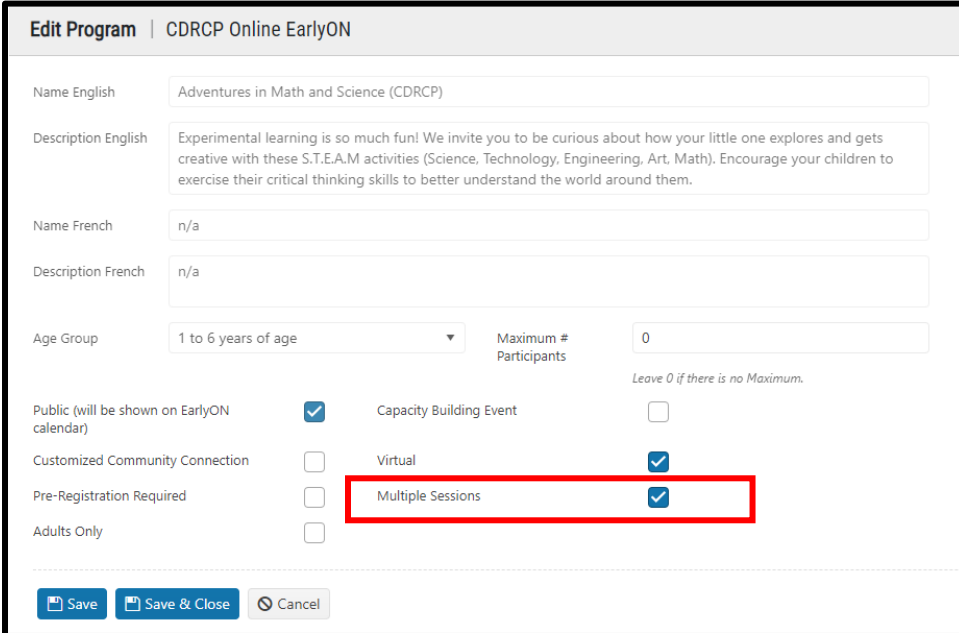
Change/Update Existing Program

1. Select day to view the day.
2. Select existing program on any day of the month, a message will appear: "Do you want to edit only this event occurrence or the whole series?"
 - Editing the occurrence makes changes to a single event, editing the series will change all events.
3. Select **Edit Current Occurrence** button.
4. Make changes as needed, click **Preview** to review changes, then click **Save and Publish**.

Scheduling a Multi Session Program

EarlyON Providers can create a multi-session program series.

Important: Before scheduling a multi session program, ensure that you check the **Multiple Session** box (refer to [Site Program Offerings](#) to complete this step)



Multi session programs are scheduled like other programs:

1. Select EarlyON menu, **Calendar**.
2. Double click on a date.
3. Input the program details (refer to [Add New Program](#))
4. Select **Save**

A family can now enroll in all sessions within a series instead of having to register for each session in a series separately.

Modifying an existing Pre-Registration and Multi-Session Program

Can be used to modify any existing program (for example, changing the maximum # participants) that has pre-registration and/or multiple sessions customization.

1. Go to **Site Program Offerings** tab under the EarlyON menu.

2. Select the Pre-Registered and/or Multi-Session Program you want to modify.
3. Modify any of [the Site Program Offerings fields](#) accessible for Head Office/Site User, click save & close.
4. Go to **Calendars** under the EarlyON menu.
5. Select the same Program you want to have the change in effect, click **Edit the Series**.
6. Select **Preview** and **Save & Publish** (The system will not save if no action takes place).
7. Check the Children's Services Portal Calendar to ensure the change is reflected as intended.

Site Devices

Adding Site Devices

It is recommended that each EarlyON site have a tablet/iPad for QR code registration as well as for participants without a smartphone.

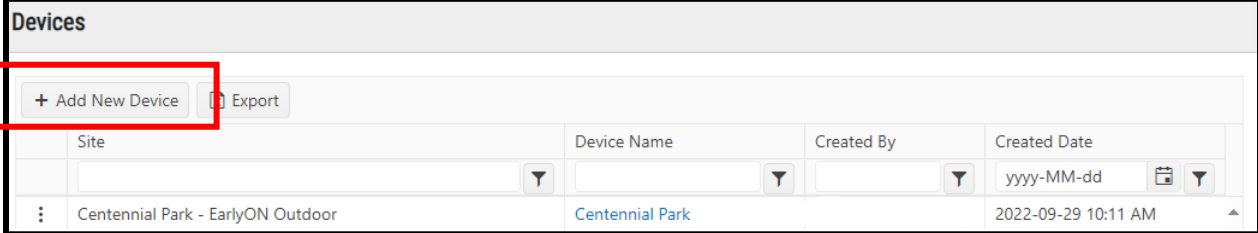
Participants can use any tablet or smartphone (Android, iPhone, iPad, Chrome OS) to register.

Tip: The screens were designed for devices running in landscape mode and you may need to change the settings on your devices accordingly.

Important: If tablets are shared between sites, all browser history should be cleared to ensure a smooth sign in process. Refer to [How to Clear Internet Cache in Every Major Browser](#) for steps on how to clear browser history.

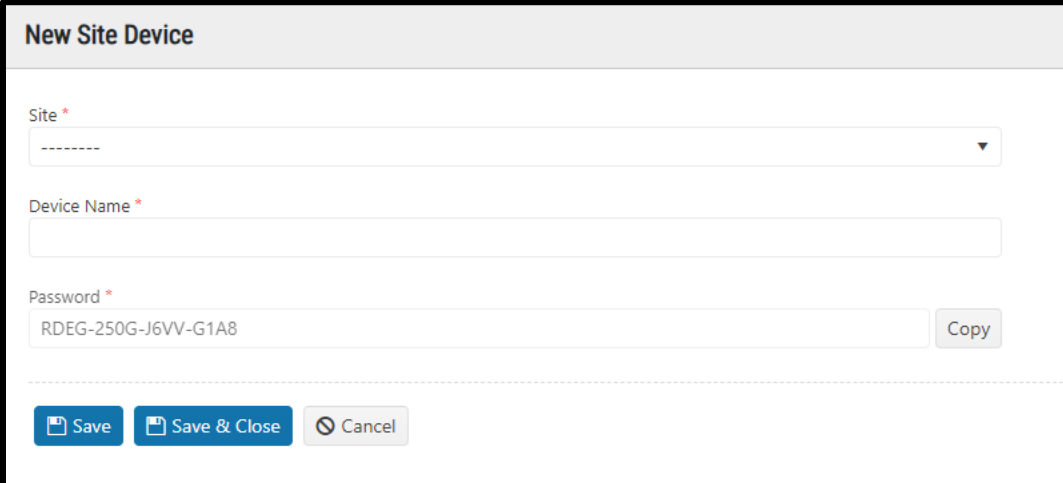
1. Select **Site Devices** menu to add a device(s) (tablet/iPad) for each site/staff if applicable.

2. Click **Add New Device** hyperlink.



Site	Device Name	Created By	Created Date
Centennial Park - EarlyON Outdoor	Centennial Park		2022-09-29 10:11 AM

3. Select the **Site** from the dropdown list.
4. Enter the device name desired (for example, site name).
5. A device password will be auto generated and shows up under the device name. Copy and paste this password onto a document on your computer or write it down for your records. Site Device passwords can be accessed by double clicking the Site in the Device list.



New Site Device

Site *

Device Name *

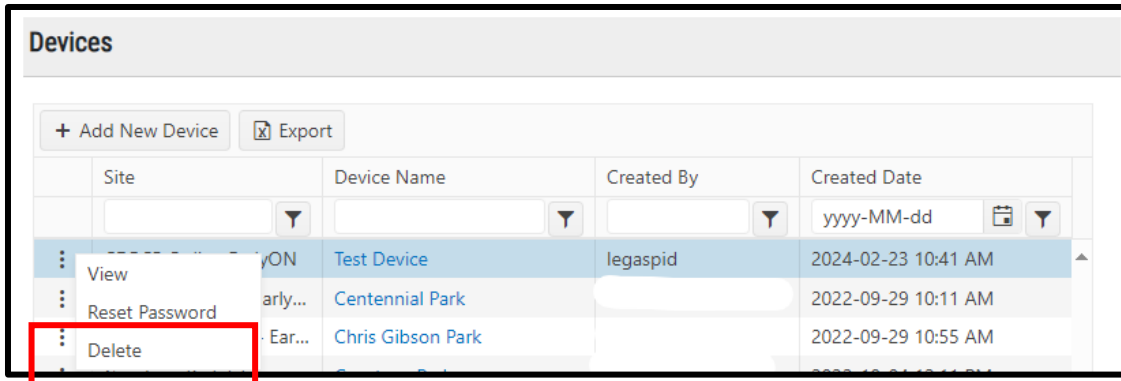
Password *
 RDEG-250G-J6VV-G1A8 Copy

Save Save & Close Cancel

6. Click **Save and Close**.

Deleting Site Device

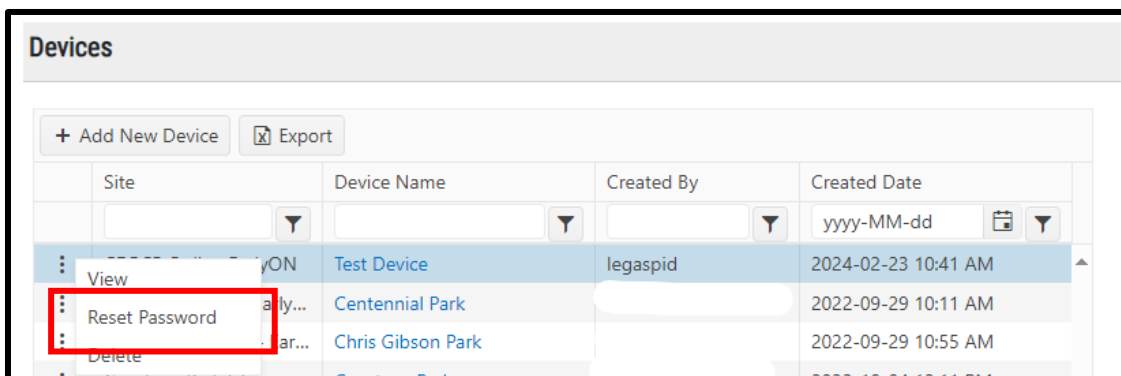
1. Select **Site Devices** menu.
2. Click on the three dots to the left of the device to be deleted.
3. Select **Delete**.



4. A prompt will pop up asking “Are you sure you want to delete this device?” Click **OK**.

Resetting Password

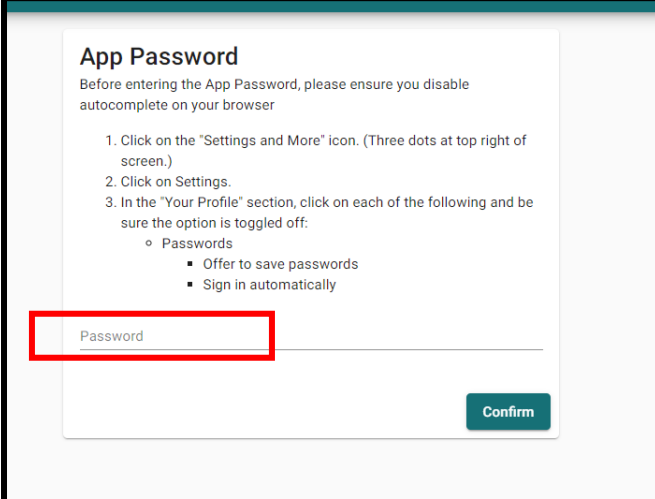
1. Select **Site Devices** menu.
2. Click on the three dots to the left of the device to be reset.
3. Select **Reset Password**.



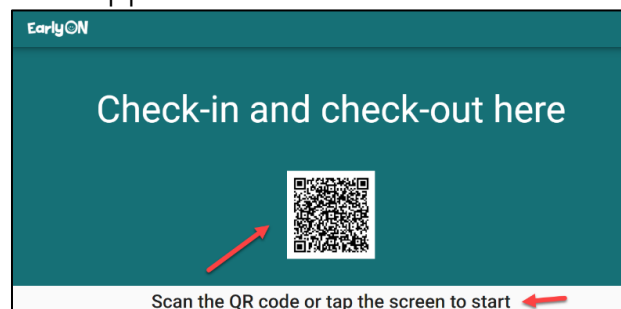
4. A prompt will pop up asking “Are you sure you want to reset this device password?” Click **OK**.
5. A pop-up window with a new unique password for the device will appear. Copy and paste this password onto a document on your computer and/or write it down for your records.

Logging into Site Device

1. On the tablet/iPad, go to a browser and open the kiosk mode web link:
<https://childcare.peelregion.ca/cso/en-ca/earlyon/app-password>
2. Enter the password on the App Password screen.



3. Click **Confirm**.
4. The following screen will appear on the tablet:



- Only "In Person" Programs for that EarlyON location are shown for check-in, check-out.
- Virtual Programs associated with the EarlyON site won't be available for any function in-person registration/kiosk mode.
 - Check-in can occur within 30 minutes of the program start time.
 - Check-out is not mandatory for participants. Please follow the steps listed in the [Attendance](#) section above to check-in/check-out participants manually.

- **New:** The screen on each tablet will now have the EarlyON site of the device located at the top.

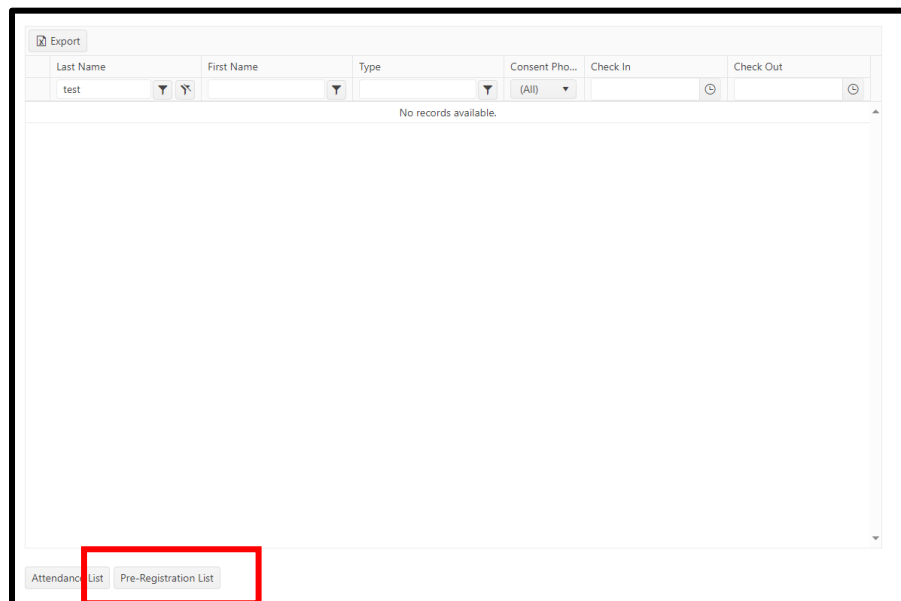
Pre-Registration List

Viewing Pre-Registration List

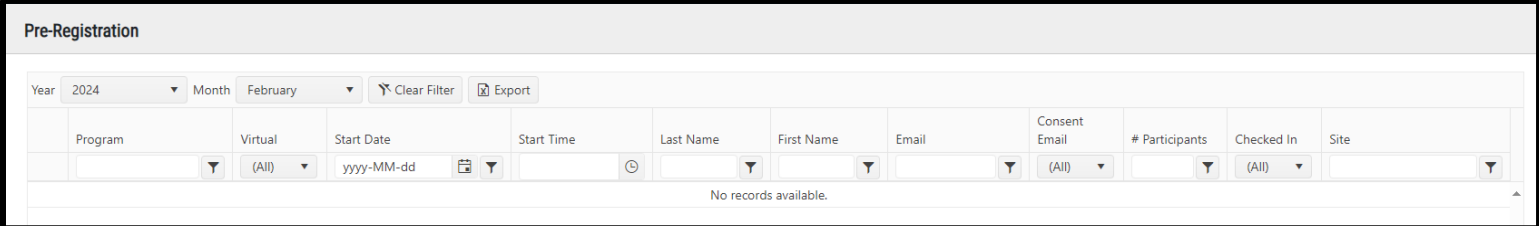
The Pre-Registration List tab shows all the pre-registrations made by participants using the Children's Services Account.

View the Pre-Registration List for a specific program at a date/time/location by:

1. Clicking the **Attendance** tab.
2. Double clicking on the program.
3. Clicking on the **Pre-Registration List** button at the bottom of the screen



Filtering and Sorting the Pre-Registration List



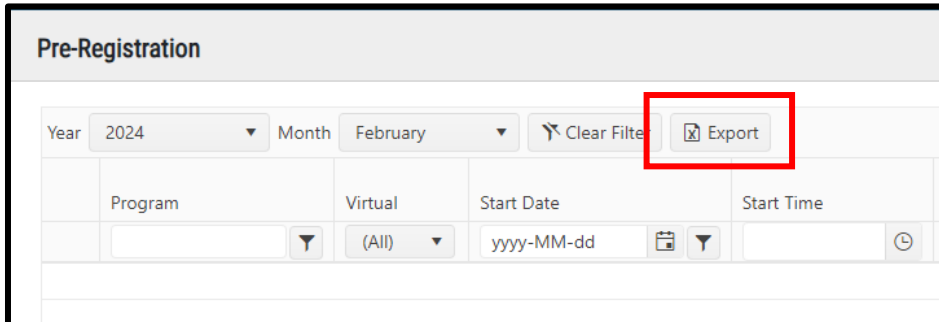
The screenshot shows the 'Pre-Registration' interface. At the top, there are filters for 'Year' (2024) and 'Month' (February), along with 'Clear Filter' and 'Export' buttons. Below this is a table with columns: Program, Virtual, Start Date, Start Time, Last Name, First Name, Email, Consent Email, # Participants, Checked In, and Site. Each column has a dropdown menu, with 'Virtual' set to '(All)', 'Start Date' to 'yyyy-MM-dd', 'Consent Email' to '(All)', and '# Participants' to '(All)'. The table is currently empty, displaying 'No records available.'

1. The Pre-Registration List is set to the current month and year by default.
2. The latest pre-registration information is at the top. The list can be sorted to show the oldest information at the top by clicking on **Start Date** in the Start Date column.
3. When participants check in to the programs, this information can be tracked by the Checked-in column with auto-populated checkmarks from the portal. This information can be filtered by selecting **Yes** in the drop-down menu that appears at the top of the Checked-in column.
4. Virtual programs can be filtered by selecting **Yes** in the drop-down menu that appears at the top of the Virtual column.

Exporting the Pre-Registration List

Family email addresses can be exported so that you can send virtual meeting invites to the EarlyON participants using applications such as Microsoft Teams or Zoom.

This list can be exported into Microsoft Excel by selecting the Export button at the top of the screen.



This screenshot is similar to the one above but highlights the 'Export' button in the top right corner of the filter area with a red rectangle.

Attendance

Important: Attendance can only be completed after the scheduled program time.

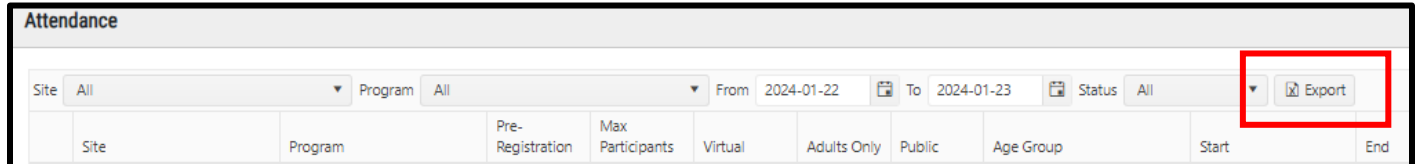
1. From the EarlyON drop down, click on **Attendance**.
2. By default, Program Offerings scheduled for today are listed on the Attendance screen. But You can search for Program to be completed by the following drop-down options:
 - Site
 - Program
 - From and to Dates - Attendance screen is set to show current week by default.
 - Attendance Status:
 - Completed - attendances that have been outcome and completed.
 - Not Completed - attendances not yet outcome.
 - All - all completed and not completed attendance.
3. To add attendees:
 - Click on the name of the Program Offering (hyperlinked in blue).
 - Click the **Add New Attendee** button in the top left corner.
 - A window will appear with Participants list that are in the system.
 - Select the Attendee you would like to add to the Attendance by clicking on the check box at the left of the participant's name and then click the **Add** button at the bottom left of the screen. Search filters are available to search for the Attendee to be added.
 - **Important:** the system will not allow a parent and/or a caregiver to check-in without a child added as an attendee, unless the Program Offering is marked as "Adult Only". For "Adult Only" programs, a child *can* attend with an adult/caregiver, but it is not required for check in.
 - Update attendees check in time. You can use the program start time as the check in time.
4. To edit check in/out time or remove attendees:
 - Double click on the attendee's name you would like to edit/remove from the attendance.
 - Click clocks to change the check in or out time or click the **Remove** button on the right corner of the Attendee's row.

Note: removing attendees this can only be done before completing attendance.

5. Once all attendees are added and checked in, click **Check Out All**. A prompt will pop up asking “Are you sure you want to check out all from this attendance?” Click **OK**.
6. Click **Complete Attendance** to close off the attendance record.
 - **Important:** thoroughly review the attendance before completing it; once attendance is marked as completed, it can not be re-opened, and no further changes or additions can be made.
 - A prompt will pop up asking “Are you sure you want to Complete this attendance?” Click **OK**
7. Click **Attendance List** button at the bottom to return to the Attendance List.

Exporting Attendance to Excel

1. Go to the **Attendance** tab under the EarlyON menu.
2. Filter any of the drop-down options that you would like to capture in the table (e.g., pull monthly attendance by setting date range).
3. Select the **Export** button at the top right of the screen.



Possible Duplicates

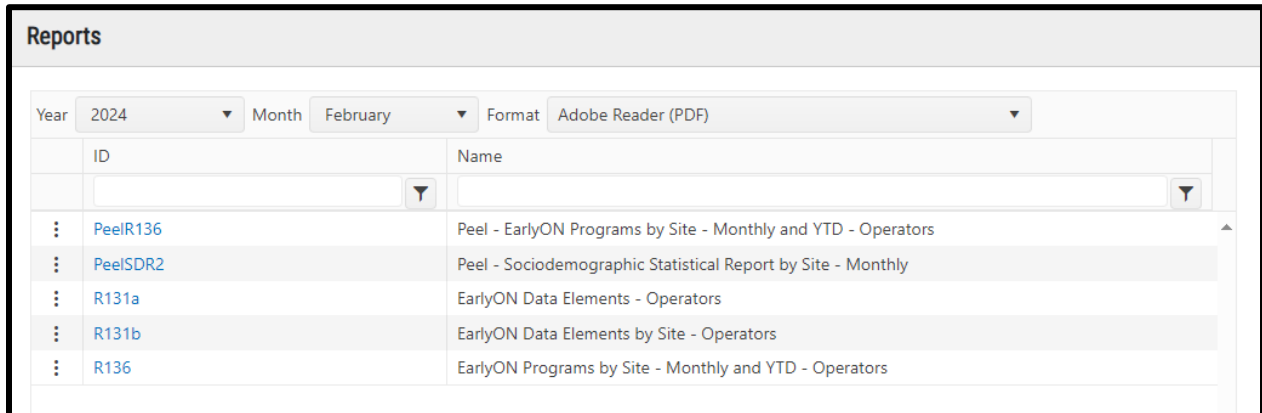
New: New tabs have been added to OCCMS-Operators that include information on possible duplicate child or adult accounts. These are named **Possible Duplicate Adults** and **Possible Duplicate Children** under EarlyON.

Within these tabs, providers can compare accounts that have been identified as potential duplicates. Fields with comparable information are shown, and providers can either merge the accounts or dismiss the potential duplicate.

Reports

Report Types

There are five downloadable reports available to support planning and programming:



ID	Name
PeelR136	Peel - EarlyON Programs by Site - Monthly and YTD - Operators
PeelSDR2	Peel - Sociodemographic Statistical Report by Site - Monthly
R131a	EarlyON Data Elements - Operators
R131b	EarlyON Data Elements by Site - Operators
R136	EarlyON Programs by Site - Monthly and YTD - Operators

New: PeelSDR2: Peel - Sociodemographic Statistical Report by Site - Monthly

This monthly report provides an overview of sociodemographic information of EarlyON participants by site.

R131a: EarlyON Data Elements - Operators

- Monthly report, divided into non-Indigenous and Indigenous led with the columns below:
 - New sites
 - Sites
 - PoS (Number of Purchase of Service agreements)
 - Number of unique children served
 - Number of visits (made by) children
 - Number of unique parents/caregivers served
 - Number of visits (made by) parents/caregivers
 - CCC (number of customized community connection programs)
 - Staff positions and FTEs (Full Time Equivalent) for each position are displayed at the end of the report.
- **New:** R131a now provides data on virtual program attendance (both non-Indigenous and Indigenous led).

R131b: EarlyON Data Elements by Site - Operators

This report provides a further breakdown of R131a by site location and by month.

R136: EarlyON Programs by Site - Monthly and YTD - Operators

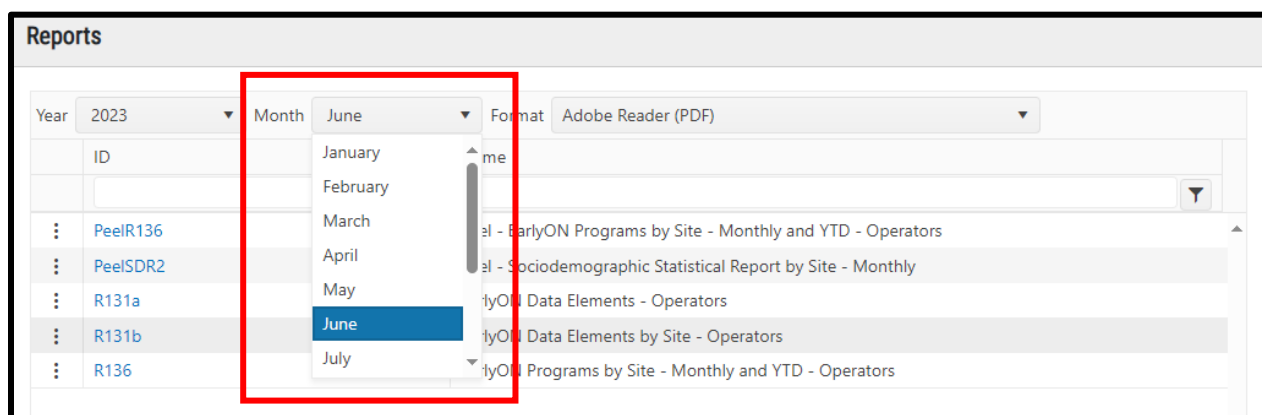
- Broken out into two parts:
 - Part 1: Number of children by program age group and postal code
 - Sorted by site name
 - Report month
 - Program age group
 - Postal code
 - Number of children
 - Part 2: Number of programs offered and number of hours:
 - Number of programs
 - Number of hours
 - Number of customized community connections
 - Number of capacity building events
 - Number of pre-registration
 - Number of virtual
 - Number of adults only programs

PeelR136: Peel - EarlyON Programs by Site - Monthly and YTD - Operators

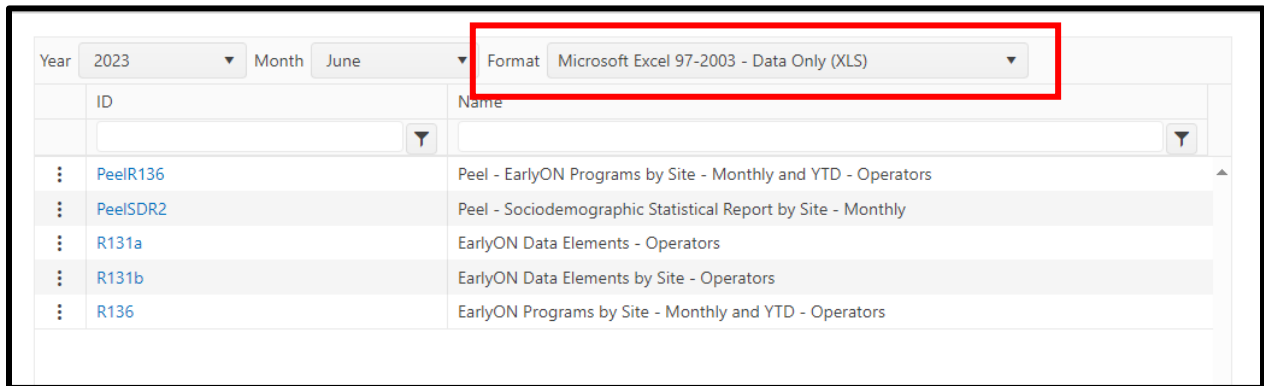
This report is an enhanced version of R136, with the addition of a total count per month and the addition of a number of parents/caregivers column.

Accessing the Reports

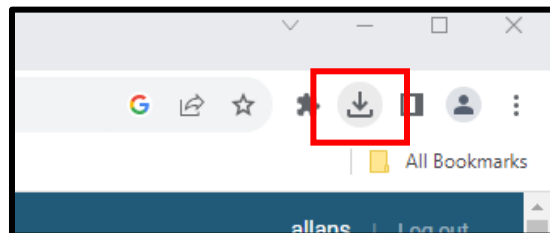
1. Select **Reports** from EarlyON menu.
2. The Year and Month filters are defaulted to the current year and month; previous month(s)/year(s) options can be selected in the dropdowns.



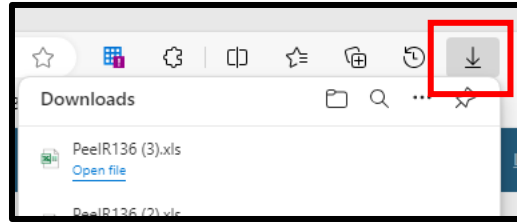
- The download format is defaulted to PDF; however, the report can also be downloaded in Microsoft Excel by selecting this option in the format drop down menu.



- Click on the name of the report (hyperlinked in blue) to download the selected report.
- PDF Format: For both Google Chrome and Microsoft Edge, A PDF file will download and open in a separate tab.
- Excel Format
 - Google Chrome:** Depending on the version of Google Chrome being used, the Excel file download will either pop up at the bottom of the screen or in the top right **Downloads** folder. Double click your chosen file to open in Excel.



- Microsoft Edge:** An excel file download will open in a separate tab. Select the download button on the right of the screen and click on **Open File** underneath the file you would like to open in Excel.



- **Note:** the Excel file is data only and will require some format adjustments:

	A	B	C	D	E	F	G	H	I	J
1										
2	Non Indi	New Sit	Sites	PoS	# Unique	# Visits	# Unique	# Visits	CCC	
3	January	0	6	0	348	1,057	323	950	0	
4	Virtual	0	0	0	0					
5	February	0	6	0	132	885	150	858	0	
6	Virtual	0	0	0	0					
7	March	0	6	0	240	1,505	230	1,426	0	
8	Virtual	0	0	0	0					
9	April	0	6	0	157	1,494	195	1,448	0	
10	Virtual	0	0	0	0					
11	May	0	6	0	163	1,950	186	1,854	0	
12	Virtual	0	0	0	0					
13	June	0	6	0	134	1,891	157	1,779	0	
14	Virtual	0	0	0	0					
15	Totals	0	1,174	8,782	1,241	8,315	0			
16	Virtual	0	0	0	0					
17										
18										
19	Total									
20										
21										
22	Printed: R131a	Page 1 of 1								
23										

- Adjust the column widths to see better.

	A	B	C	D	E	F	G	H
1								
2	Non Indigenous-led	New Sites	Sites	PoS	# Unique Children Served	# Visits Children	# Unique Parents / Caregivers Served	# Visits Parents / Caregivers
3	January	0	6	0	348	1,057	323	950
4	Virtual	0	0	0	0			
5	February	0	6	0	132	885	150	858
6	Virtual	0	0	0	0			
7	March	0	6	0	240	1,505	230	1,426
8	Virtual	0	0	0	0			
9	April	0	6	0	157	1,494	195	1,448
10	Virtual	0	0	0	0			
11	May	0	6	0	163	1,950	186	1,854
12	Virtual	0	0	0	0			
13	June	0	6	0	134	1,891	157	1,779
14	Virtual	0	0	0	0			
15	Totals	0	1,174	8,782	1,241	8,315	0	
16	Virtual	0	0	0	0			
17								
18								
19	Total							
20								

- The **Totals** row (row 15 in this example) will be misaligned. To align the totals with the data in the rows above, select the totals in row 15 and shift two columns to the right.

- In this example, the data in row 15, columns C-F (above) will shift two columns to the right, so they populate columns E-H (below).

	A	B	C	D	E	F	G	H	I	J
1										
2	Non Indigenous-led	New Sites	Sites	PoS	# Unique Children Served	# Visits Children	# Unique Parents / Caregivers Served	# Visits Parents / Caregivers	CCC	
3	January	0	6	0	348	1,057	323	950	0	
4	Virtual	0	0	0	0					
5	February	0	6	0	132	885	150	858	0	
6	Virtual	0	0	0	0					
7	March	0	6	0	240	1,505	230	1,426	0	
8	Virtual	0	0	0	0					
9	April	0	6	0	157	1,494	195	1,448	0	
10	Virtual	0	0	0	0					
11	May	0	6	0	163	1,950	186	1,854	0	
12	Virtual	0	0	0	0					
13	June	0	6	0	134	1,891	157	1,779	0	
14	Virtual	0	0	0	0					
15	Totals	0	0	0	1,174	8,782	1,241	8,315		
16	Virtual	0	0	0	0					
17										