OCCMS-Operators User Manual
Peel EarlyON Providers

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Purpose

OCCMS-Operators is used by EarlyON service providers and accessible to the Region of Peel.

This tool enables EarlyON service providers to manage information regarding EarlyON Participants, Schedules/Calendars, and EarlyON Attendance.

The Region of Peel can view information entered by service providers.

Accessing OCCMS

User Permissions

There are 2 types of user permissions:

- Head Office Administrator
- Head Office/Site Users

Head Office Administrators can:	Head Office Users / Site Users can:
- Add new Head Office Administrators, Head Office Users, and Site Users - Reset their staff passwords - Add/delete EarlyON Participants information - Add/View Calendars - View Pre-Registration List - Add Participants and complete EarlyON Attendance - Add/Edit Site Devices - Add/view EarlyON Staff Positions Information - View Reports	- Add/delete EarlyON Participants information - Add/View Calendars - View Pre-Registration List - Complete EarlyON Attendance - Add/Edit Site Devices - Add/view EarlyON Staff Positions Information - View Reports

OCCMS-Operators Web Link

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

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✏️ **Tip!** Quick access to OCCMS-Operators:

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

Password

- If it is the first time you are using OCCMS-Operators, you will receive a temporary password from your Head Office Administrator.

- Keep your password in safe keeping as OCCMS-Operators does not have the ability to remember your password.

- Your OCCMS-Operators password is case sensitive.

- 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 3 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

Signing in to OCCMS-Operators

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

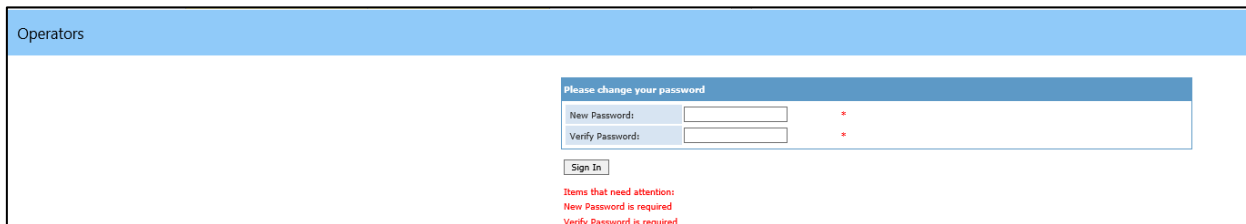2. In **Username field**, enter the Username assigned to you

- *This will be your last name and first initial e.g.: for Michelle Obama, her username would be obamam*

3. In **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 In **password field**

   b. Click **Sign In**.

Operators	
	Please change your password
	New Password: [_____] *
	Verify Password: [_____] *
	Sign In
	Items that need attention:
	New Password is required
	Verify Password is required

   c. Enter a **New Password** and re-type it in the **Verify Password** field.
   - All passwords are case sensitive

   d. Click **Sign In** again and follow sign in process

EarlyON-Operators Menu

Log in to OCCMS Operators as the Head Office Administrator.

Click **EarlyON** and the following menu options will appear:

- **Participants**
- **Site Program Offerings - NEW**
- **Calendars – UPDATED NAME (formally Schedules)**
- **Pre-Registration**
- **Attendance**
- **Site Devices**
- **Staff Positions –** *this feature is not used in Peel*
- **Reports - NEW**

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Participants

Adding Participants

1. Select EarlyON menu, Participants.

2. Select Add New Adult hyperlink on the top left corner.
   - Enter information in the mandatory fields marked with an asterisk (*).
   - Enter information in the remainder of the fields and checkmarks where applicable.
   - Click Save
   - Add New Group option will be available – enter children or additional adults to be grouped with this participant

Adding a New Group

1. Click **Add New Adult** or **Add New Child** link

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

	Last Name	First Name	Phone Number	Postal Code	Email
>	earlyon				
	EarlyON	Emma	(905) 222-2222	L4W 3N7	nancy.pacheco@peelregion.ca
	EarlyON	Erin	(416) 700-7000	L4W 3N7	nancy.pacheco@peelregion.ca

Adults - Please look for the adult here. Double click on the adult to add to the group. If she/he is not here click Add New.

Add New Adult

3. If this is a new adult or child, click **Add New Adult** or **Add New Child** and enter information in the mandatory fields marked with an asterisk (*).
   - Enter information/checkmarks in the remaining fields where applicable.

4. Click **Save** and **Close**

Editing or Deleting Participants

Editing
1. Click either **Edit Adult** or **Edit Child** and make necessary changes

2. Click **save**

Deleting

1. Click **Remove from Group** hyperlink beside the adult or child row:

2. A Popup will appear "Are you sure that you want to remove this person 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 right clicking and selecting the delete option.

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

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Site Program Offerings

The Site Program Offerings menu is a new feature in OCCMS-Operators 9.9. This menu is where all programs for the EarlyON sites are stored.

Adding Program Details

Once the program is populated by Region of Peel 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.

3. Double click anywhere in the row of the program you want to view or update. The program will highlight in blue:

The program name description and age group are populated by Peel staff and appear as read only.

Edit Program Family Fun Centre Program		
Name English	Family Fun Centre Program	
Description English	This is a test program	**Completed by ROP staff**
Name French	N/A	
Description French	N/A	
Age Group	0 to 6 years of age	Customized Community Connection ☐
Capacity Building Event	☐	Pre-Registration Required ☐ **Completed by EarlyON Providers**
Virtual	☐	Adults Only ☐
Multiple Sessions	☐	
Maximum # Participants	0	Leave 0 if there is no Maximum.

You will complete the following remaining fields:

Customized Community Connection	Selected to capture customized community connection programs for reporting purposes
Capacity Building Event	Selected to capture capacity building events for reporting purposes
Pre-registration required	When selected, participants are required to pre-register through the children's services portal for the program
Virtual	When checked denotes that the program is not in person and is offered online
Adults Only	These programs are intended for parents/caregivers. They can be attended with or without children.
Multiple Session	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.
Max # of participants	Allows EarlyON providers to control the max # of participants attending a program. It can be left at zero (0) if there is no maximum

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- 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.

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Calendars (formally Schedules)

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 Site Program Offerings
   - The view defaults to the current monthly schedule:

3. Filter using the menu:

All Sites	Allows user to view site colours and filter by site
All Programs	Users can filter be 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
Agenda	Provides an agenda view of the calendar

Scheduling Program

Programs are added to the schedule by selecting the day.

1. Double click on calendar day

2. The Event screen appears:

Site	• Dropdown with sites available to schedule
Program	• Drop down provides programs available at that site
Start	• Date and time that program will start
End	• Date and time that program will end

Repeat	• Select **never** for a "one time only" program that will not be repeated, i.e.: special events, guest speakers
	• Select **daily** for programs that will 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 it defaults to <u>the current day of the week</u>, not the day selected in the system**
	• Select **monthly** for programs that repeat once per month:
	   ○ select the monthly frequency the program is to be repeated (i.e.: every month or every 3 months)
	   ○ when the program is to be repeated (specific day of the month i.e.: 7th day *or* specific day of the week i.e.: the first Tuesday of the month)
	• Select **yearly** for programs that repeat once per year:
	   ○ select the yearly frequency the program is to be repeated (i.e.: every 1 year, every 2 years)
	   ○ when the program is to be repeated (specific day of the year h i.e.: 7th day of June or specific day of the week in a month i.e.: the third Wednesday in August)

End **Recommended**	• Selecting **Never** denotes that program will repeat indefinitely with no end date • Selecting **After # of occurrences** allows you to select the # of times this program will repeat • Selecting **an end date** allows the user to select the date the program will end
Description	• Auto populates when program was created; can only be edited by Region of Peel staff
Comment	• Form field section where you can input and customize additional information (i.e., links to virtual programs or other websites, information for families to consider in preparation for an event, etc.) • **NOTE:** Editing the comment field is only available for editing the series.

3. Select **Save** to populate the calendar

4. 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 save

Scheduling a Multi Session Program

Scheduling has been enhanced with the addition of multi-session programs. This enhancement provides EarlyON Providers with the ability to create a multi-session program series.
IMPORTANT: Before scheduling a multi session program, ensure that **Multiple Session** box is ticked (refer to Site Program Offerings to complete this step)

Edit Program Family Fun Centre Program			
Name English	Family Fun Centre Program		
Description English	This is a test program		
Name French	N/A		
Description French	N/A		
Age Group	0 to 6 years of age	Customized Community Connection	☐
Capacity Building Event	☐	Pre-Registration Required	☑
Virtual	☐	Adults Only	☐
Multiple Sessions	☑		
Maximum # Participants	20	Leave 0 if there is no Maximum.	

Save   Save & Close   Cancel

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](#))

IMPORTANT: multi session programs **must** have an end date. If an end date is not added, an error message is received:
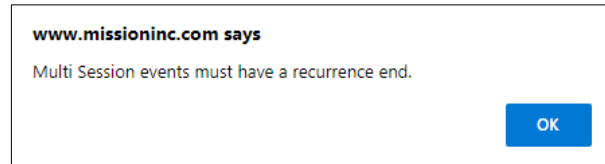
4. Select Save

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 – NEW

Can be used to modify any existing program (e.g., want to change 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. Under the Comment field, place a period "." (**Note:** Can be any subtle change in the comment field. The system will not save if no action takes place) and click Save.

7. Check the Children's Services Portal Calendar to ensure the change reflected as intended.

Site Devices
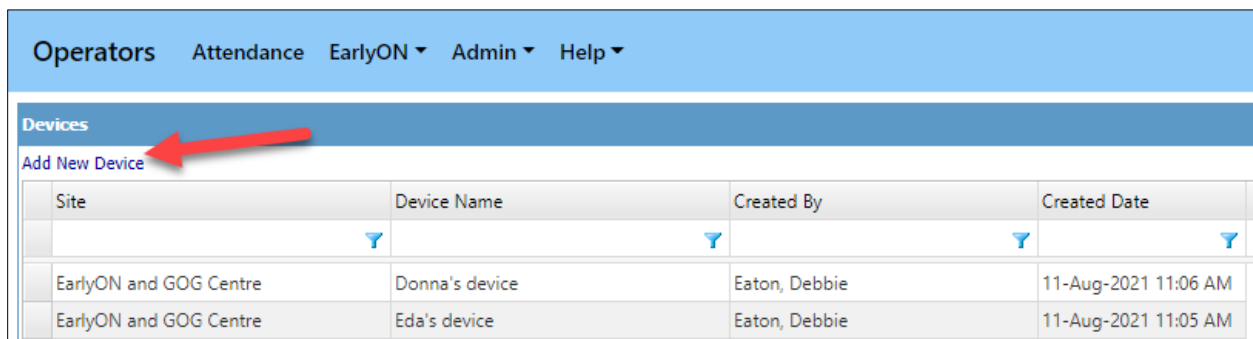
Adding Site Devices

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

- Any tablet or smartphone (Android, iPhone, iPad, Chrome OS) can be used to register by the participants.

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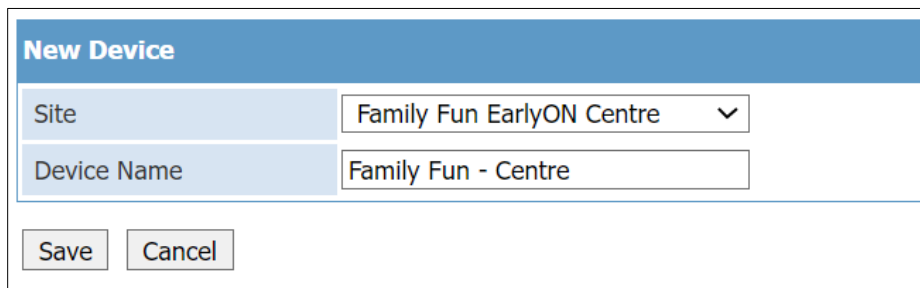
- • ✏️ **Tip:** The screens were designed for devices running in landscape mode and you may need to change the settings on your devices accordingly.

- **IMPORTANT:** If tablets are shared between sites, all browser history should be cleared to ensure smooth sign in process. Refer to <u>How to Clear Internet Cache in Every Major Browser</u> 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.

Operators	Attendance	EarlyON ▾	Admin ▾	Help ▾	

Devices

Add New Device

Site	Device Name	Created By	Created Date
▼	▼	▼	▼
EarlyON and GOG Centre	Donna's device	Eaton, Debbie	11-Aug-2021 11:06 AM
EarlyON and GOG Centre	Eda's device	Eaton, Debbie	11-Aug-2021 11:05 AM

3. Select the **Site Name** from the dropdown.

4. Enter the device name desired. (e.g.: Site name can be entered here):

New Device

Site	Family Fun EarlyON Centre ⌄
Device Name	Family Fun - Centre

Save   Cancel

5. Click **Save.**

6. A pop-up window with a unique password for the device added appears.

- **NOTE:** Copy and paste this password onto a document on your computer and/or write it down for your records. Site Device passwords can be accessed by double clicking the Site in the Device list.

Deleting Site Device

1. Select **Site Devices** menu

2. <u>Left click</u> on 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. Left click on 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.

App Password

Before entering the App Password, please ensure you disable autocomplete on your browser

1. Click on the "Settings and More" icon. (Three dots at top right of screen.)
2. Click on Settings.
3. In the "Your Profile" section, click on each of the following and be sure the option is toggled off:
   - Passwords
     - Offer to save passwords
     - Sign in automatically

Password

Confirm

3. Click Confirm.

4. The following screen will appear on the tablet:

EarlyON

Check-in and check-out here

Scan the QR code or tap the screen to start
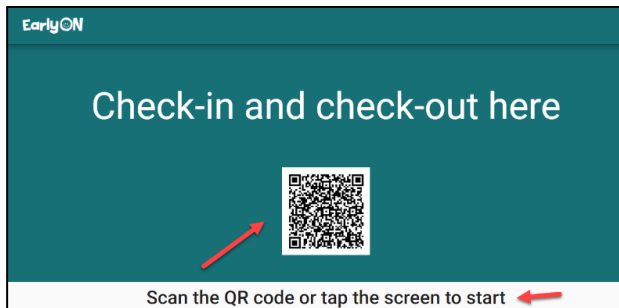
- Only "In Person" Programs for that EarlyON location are shown for check-in, check-out.

- 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.

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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 portal.

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

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Filtering and Sorting the Pre-Registration List

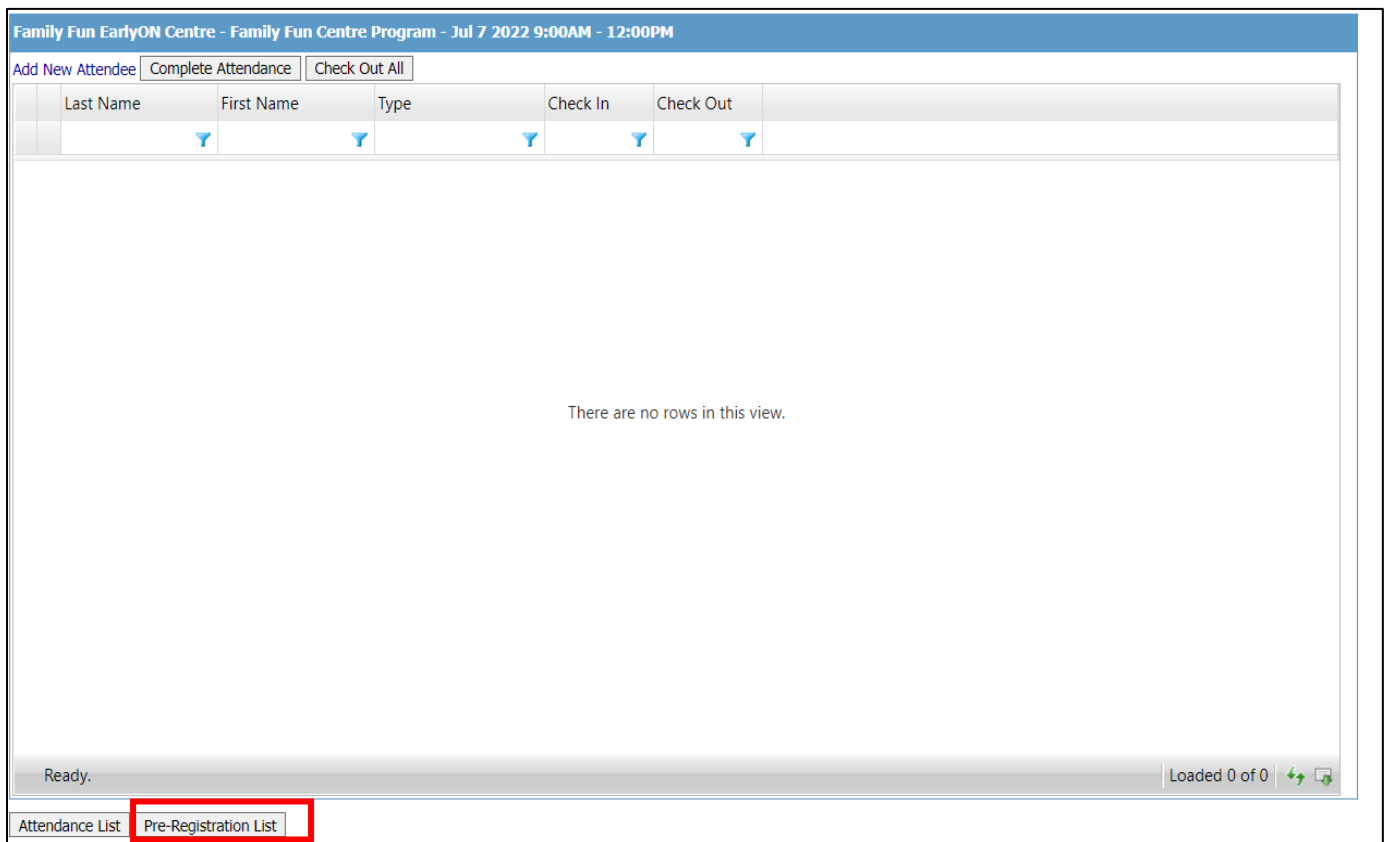| Pre-Registration								
Year 2022 Month June								
Program	Virtual	Start	Last Name	First Name	Email	# Participants ↓	Checked In	Site
	☐						☐	
Family Time (BridgeWay)	☐	06-Jun-2022 5:00 PM	EarlyON	Emma	nancy.pacheco@peelregi...	2	☐	Brampton Library South West Bran...
TEST - Virtual Program	☑	06-Jun-2022 2:30 PM	EarlyON	Emma	nancy.pacheco@peelregi...	2	☐	Malton Neighbourhood Services O...
TEST - Outdoor Program	☐	28-Jun-2022 4:30 PM	EarlyON	Emma	nancy.pacheco@peelregi...	2	☐	Paul Coffey Park - EarlyON Outdoor
TEST - Outdoor Program	☐	21-Jun-2022 4:30 PM	EarlyON	Emma	nancy.pacheco@peelregi...	2	☐	Paul Coffey Park - EarlyON Outdoor
TEST - Outdoor Program	☐	14-Jun-2022 4:30 PM	EarlyON	Emma	nancy.pacheco@peelregi...	2	☐	Paul Coffey Park - EarlyON Outdoor
TEST - Outdoor Program	☐	09-Jun-2022 8:00 AM	EarlyON	Emma	nancy.pacheco@peelregi...	2	☐	Paul Coffey Park - EarlyON Outdoor
TEST - Outdoor Program	☐	07-Jun-2022 4:30 PM	EarlyON	Emma	nancy.pacheco@peelregi...	2	☐	Paul Coffey Park - EarlyON Outdoor
TEST - Outdoor Program	☐	07-Jun-2022 9:00 AM	Tester	Tammy	earlyon@peelregion.ca	2	☑	Paul Coffey Park - EarlyON Outdoor

1. The Pre-Registration List is set to the current month and year by default.

2. The latest pre-registration information is listed at the top. The list can be sorted to show the oldest information at the top by clicking on "Start" in the Start 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 entering a checkmark in the Checked-in column at the top.

4. Virtual programs can be filtered by entering a checkmark in Virtual checkbox at the top.

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/Zoom etc.

This list can be exported into different file formats by:

1. Clicking on the Export Grid button on the bottom right corner of the screen

2. Selecting the file format

3. Clicking Export Now

Export root table
Export selected child table
HTML
PDF
XML
EXCEL
TIFF
RTF
TEXT
Portrait
Landscape
Export now

Loaded 1 of 1

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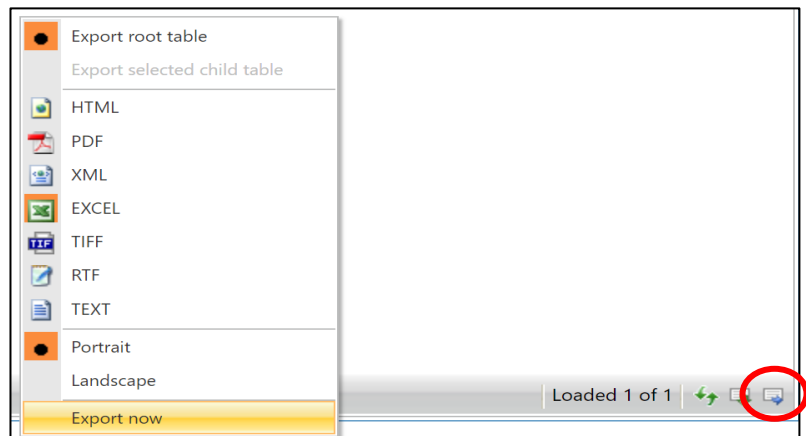
Attendance

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
   - Programs
   - From and to Dates - Attendance screen is set to show current week by default.
   - Attendance Status:
     o Completed – attendances that have been outcome and completed
     o Not Completed – attendances not yet outcome
     o All – all completed and not completed attendance

3. To add attendees:
   a) Double click on the Program Offering line.
   b) Click Add New Attendee hyperlink on the top left corner.
   c) A window will appear with Participants list that are in the system.
   d) Double click on the Attendee you would like to add to the Attendance. 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.

   e) Update attendees check in time

      - **Tip!** use the program start time as the check in time

4. To edit check in/out time or remove attendees:
   a) Double click on the attendee name you would like to edit/remove from the attendance.
   b) 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 - NEW

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).

Attendance

| Site | All | Program | All | From | 2022-11-11 | To | 2022-11-18 | Status | All |
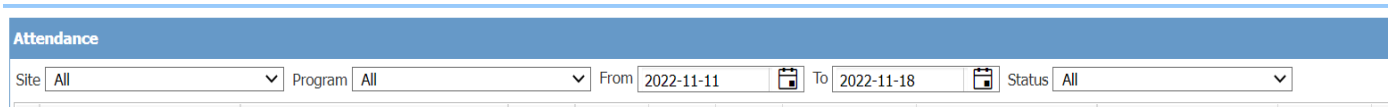
3. Right click any cell in the **Attendance** list, until it shows this option. Click **Copy this Table**:
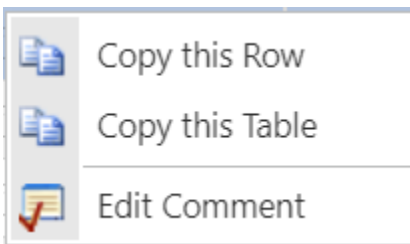
4. Open Microsoft Excel and open a new worksheet.

5. Right click and select Paste (Shortcut: Ctrl + "V").

Reports
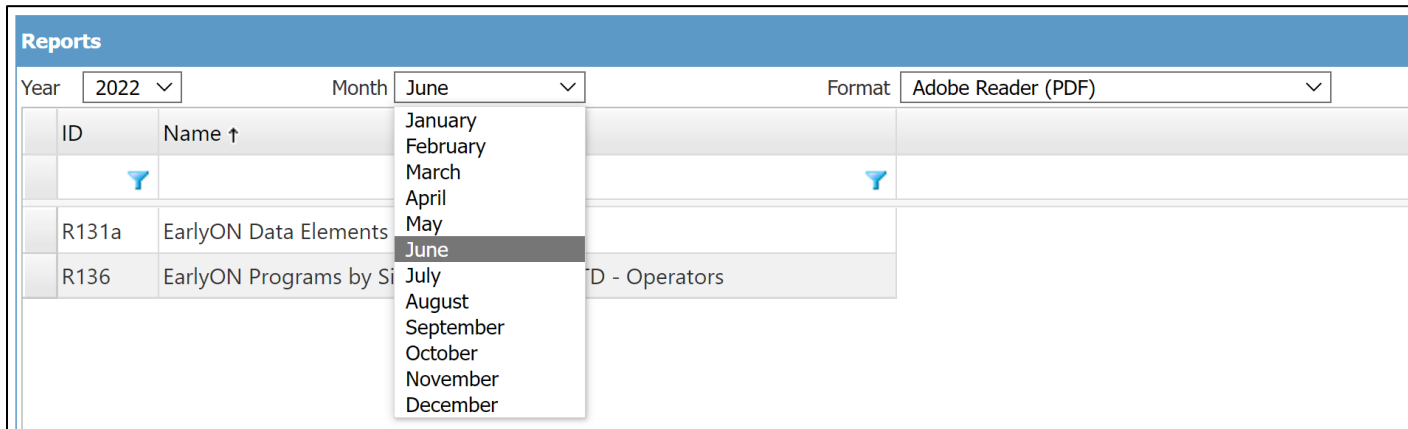
Report Types

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

Reports		
Year 2022 ⌄	**Month** July ⌄	**Format** Adobe Reader (PDF) ⌄
ID	**Name** ↑	
▼	▼	
R131a	EarlyON Data Elements - Operators	
R136	EarlyON Programs by Site - Monthly and YTD - Operators	

R131a: EarlyON Data Elements – Operators	R136: EarlyON Programs by Site – Monthly and YTD – Operators
This is a monthly report that's divided into Non Indigenous-led and Indigenous-led with the columns below: • New Sites • Sites • PoS (# of Purchase of Service Agreements) • # Unique Children Served • # Visits (made by) Children • # Unique Parents / Caregivers Served • # Visits (made by) Parents / Caregivers • CCC (# of Customized Community Connection Programs) • Staff Positions and FTEs (Full Time Equivalent) for each Position are displayed at the end of the report.	This report is broken 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 • # Children • # Adults (Parents/Caregivers) Part 2: Number of Programs Offered and Number of Hours • # Programs • # Hours • # Customized Community Connections • # Capacity Building Events • # Pre-Registration • # Virtual • # Adults Only

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.
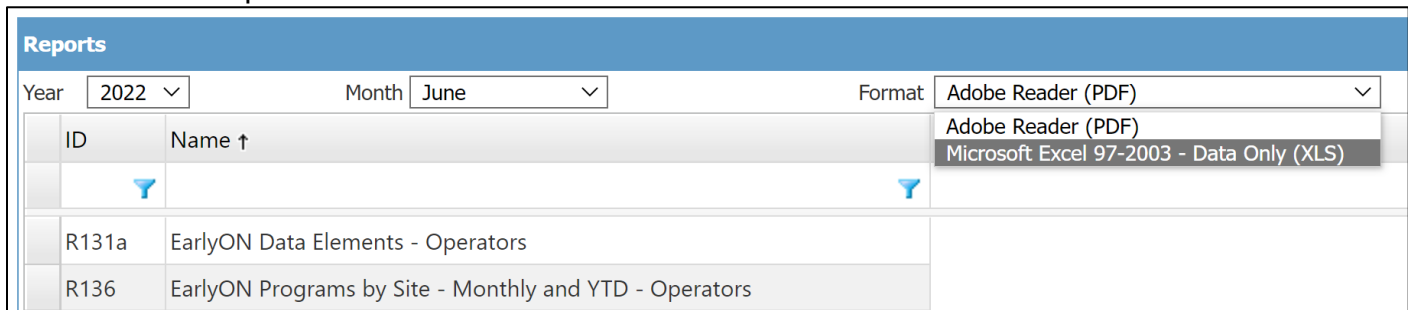

3. The download format is defaulted to PDF; however, the report can also be downloaded in Microsoft Excel spreadsheet:

4. Double click on the report line listed to download the selected report.

5. PDF Format
   - For both Google Chrome and Microsoft Edge, A PDF file will download and open in **a separate tab:**

Google Chrome:
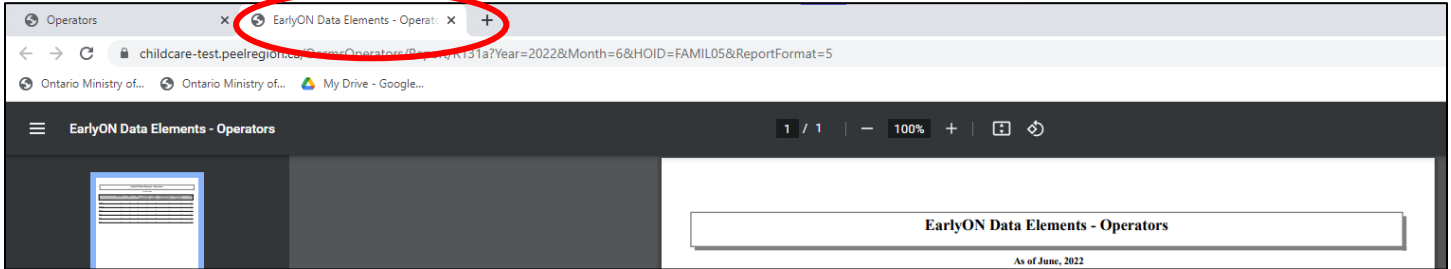
Microsoft Edge:

6. Excel Format
   - **Google Chrome:** An excel file download will pop up at **the bottom of the screen**, double click to open in Excel

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- **Microsoft Edge:** An excel file download will open in **a separate tab**, double click the excel file on the right side to open in Excel
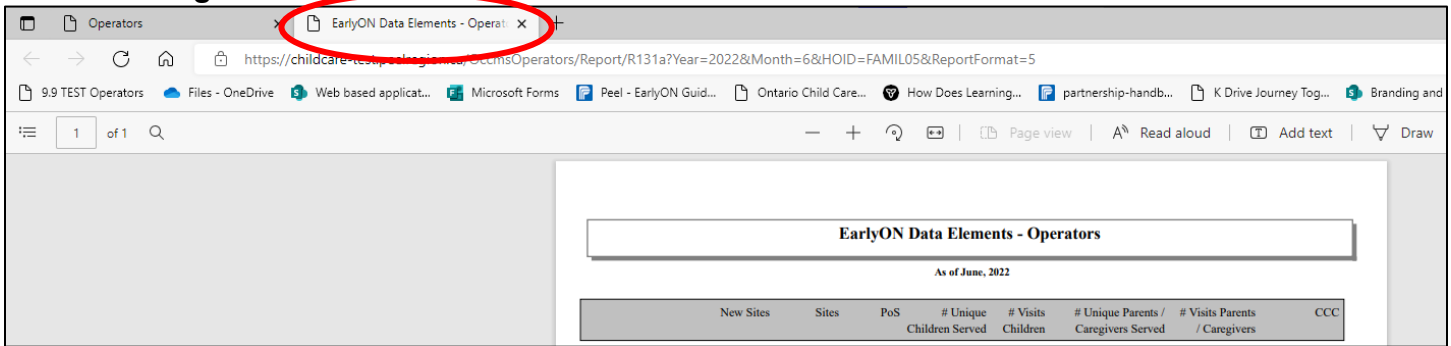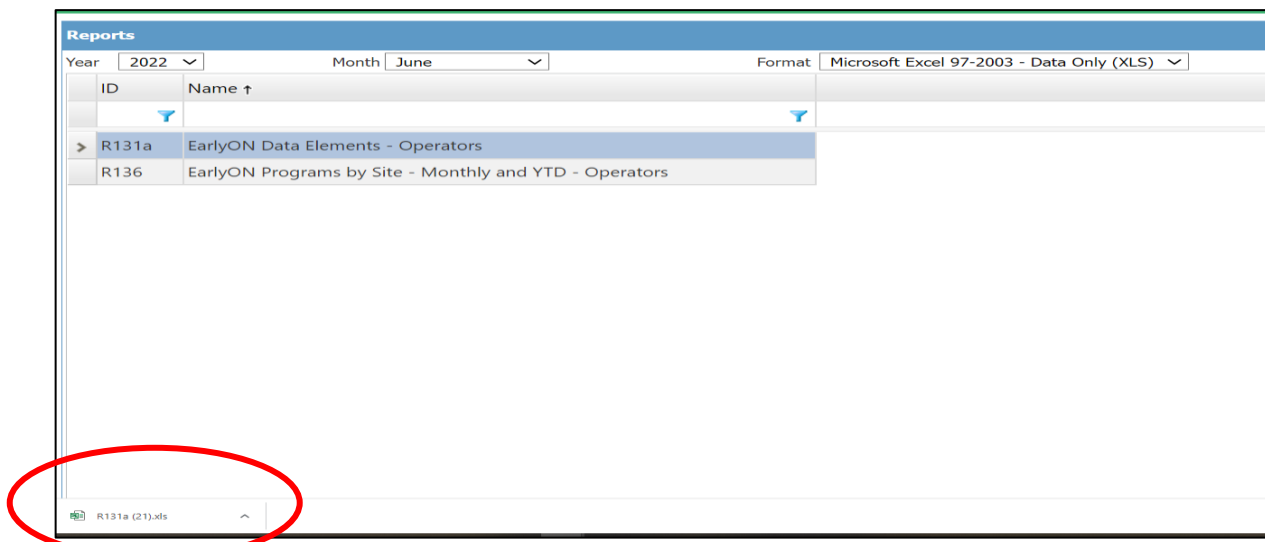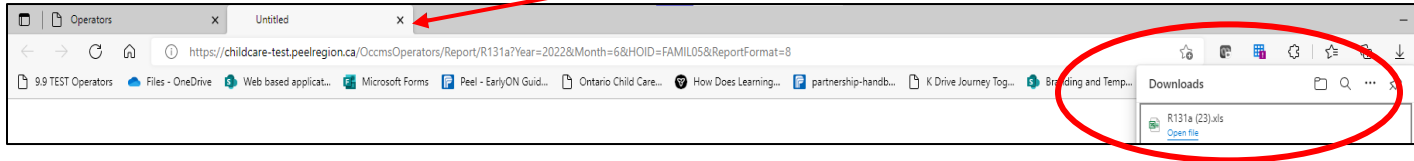
Operators	Untitled

https://childcare-test.peelregion.ca/OccmsOperators/Report/R131a?Year=2022&Month=6&HOID=FAMIL05&ReportFormat=8

9.9 TEST Operators · Files - OneDrive · Web based applicat... · Microsoft Forms · Peel - EarlyON Guid... · Ontario Child Care... · How Does Learning... · partnership-handb... · K Drive Journey Tog... · Branding and Temp...

Downloads

R131a (23).xls
Open file

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

	A	B	C	D	E	F	G	H	I
1									
2	New Sit	Sites	PoS	# Uniqu	# Visits	# Uniqu	# Visits	CCC	
3	January	0	0	0	0	0	0	0	0
4	Februar	0	0	0	0	0	0	0	0
5	March	0	0	0	0	0	0	0	0
6	April	0	0	0	0	0	0	0	0
7	May	0	0	0	0	0	0	0	0
8	June	0	0	0	0	0	0	0	0
9									
10									
11	Total								
12									
13									
14	Printed:	R131a	Page 1 of 1						

- Move the labels (row 2) to the left by one column and adjust the column widths for better visibility:

	A	B	C	D	E	F	G	H	I
1									
2		New Sites	Sites	PoS	# Unique Children Served	# Visits Children	# Unique Parents / Caregivers Served	# Visits Parents / Caregivers	CCC
3	January		0	0	0	0	0	0	0
4	February		0	0	0	0	0	0	0
5	March		0	0	0	0	0	0	0
6	April		0	0	0	0	0	0	0
7	May		0	0	0	0	0	0	0
8	June		0	0	0	0	0	0	0
9									
10									
11	Total								
12									
13									
14	Printed: 2022-06-08 10:21:36AM	R131a	Page 1 of 1						