

### QUESTION TOPICS

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### ACCOUNT SETUP

#### I am not receiving emails from PDIS.

Verify that your email address is accurate in PDIS. Also, check your junk email folder and mark the PDIS email domain as “not junk” or add the PDIS email to your contacts or your “safe sender” list. Here is the email address to add to your contacts: [msonlineservicesteam@microsoftonline.com](mailto:msonlineservicesteam@microsoftonline.com). The sender will appear as Microsoft on behalf of New Mexico Early Childhood Education and Care Department.

### AFFILIATIONS

#### What is the process for adding an additional employee as an administrator?

In your profile, you will find a section labeled **Agency Tools**. Click on **My Agencies** > click + Add **Employee** (in the upper right corner). In the pop-up window, select **Search by PDIS number** if you have that information available, or you can **Invite User to PDIS** using the employee’s personal email address

#### What options are available for an employee who is neither a director nor an owner but wishes to work in PDIS as an administrator for multiple sites?

To gain permission for each specific site, you will need to notify the directors of the facilities where your profile has been established that you are ready to start working in PDIS. The director will then proceed to update your permission in PDIS.

#### What should I do if I am unable to locate my Agency?

To find your Agency, please share the following information: EPICS ID, Location Name, and Location Address.

#### What should I do if I have been invited to create a profile in PDIS?

Provide the following details:

- Location Name.
- Location Address.
- Program Setting(s).
- Counties Served.
- Phone Number.
- Website URL.

We'll update your permission to Agency Admin. After you log back into PDIS, you will find the Agency Tools menu. This section is where you will manage your employee roster.

## How can I find one of my employees who is not listed in my pending request or active list?

Once the employee has created the profile, you can extend the invitation to join your team. The employee will need to accept your invitation. After both parties have confirmed the partnership, the employee's name will appear in the active roster. Alternatively, the employee has the option to return to the PDIS system and submit a request to join your agency. The employee should navigate to **Manage** and search for the agency's name.

## How do I connect my profile to my employer?

Navigate to **My Affiliations**, select **Add New Affiliation**, search for your agency name, click **Request, Done**.

## Where do I manage employees in the roster?

When you login into PDIS, you should see **Agency Tools** menu. This is the section where you will manage your active employees.

I'm encountering a problem with adding some employees. They have received the setup link and completed the sign-up process, yet they are not showing up in my "pending" list under my affiliations. I entered their PDIS numbers from their dashboards, but I received an error message stating that the user does not exist. I asked them to try establishing their affiliation with me on their end, but the system isn't showing any affiliation in their search bar.

Please make sure that your employees complete the following steps. Navigate to **My Affiliations**, select **Add New Affiliation**, search for your agency name, click **Request, Done**.

## Can I affiliate with multiple employers (agencies)?

Yes! PDIS accommodates multiple affiliations. For example, you might work part-time for two different employers.

## Can I have more than one active affiliation with the same employer Agency?

No. While you can have multiple employers within PDIS, you can have only one current affiliation (job) record with each employer at a time.

## If my job title at my current employer changes, should I disaffiliate?

No. Your employer will update your affiliation details if your job title and/or salary changes.

## Can my previous employer edit my profile?

No. If you are disaffiliated with an employer, they will have a record of your employment, but they cannot edit your profile and will not see any new edit you make to your Profile.

## How can I change my agency profile information?

This can be done only by ECECD. Please reach out to us for any changes that are needed.

## What is my employee's PDIS number?

If you are trying to add an employee to your Active Roster, your employee will need to give you their PDIS number after they have created a PDIS account.

## BACKGROUND CHECKS

I've successfully added all employees, and they are now showing as active on my end. However, I'm facing an error when attempting to link any of their background checks.

Please follow these steps:

- Navigate to **My Agencies > View Roster**
  - Click the **three-dot menu** next to the employee's name and select **Link EPICS Background**.
  - Enter the employee's **EPICS Person ID** and click or press **Enter** on your keyboard.
  - **If a match is found**, click **Link EPICS Number**
  - Linking is only enabled if there is an exact match on the date of birth on PDIS
- If no match is found
  - Confirm the **date of birth** in the person's PDIS profile.
  - Verify the correct **EPICS person ID** was entered for the PDIS record and try again.

Contact **PDIS Support** at [PDIS-Support@eecd.nm.gov](mailto:PDIS-Support@eecd.nm.gov) if the issue persists.

## DOCUMENTS

As an agency administrator, what is the process for uploading an employee's documents?

Select the employee for whom you wish to upload the document. Click **View Profile as Admin > Upload Documents**.

## I uploaded a document, but it does not appear. Why?

Clicking the refresh button in your browser should fix this issue.

## What file types can I upload?

The following file types are accepted: PDF, JPEG (JPG), PNG, GIF, DOCX (DOC), XLSX (XLS), PPTX (PPT), or CSV.

## What is the maximum file size I can upload?

Files cannot exceed 10 MB.

## I can't edit or delete a certain document. Why?

You cannot edit a document if it is attached to a goal and verified by your employer or ECECD.

## Why does preview not seem to be working?

Only images (JPEG, JPG, PNG or GIF) and PDFs support previews. Previewing PDFs might be blocked by your browser settings.

## GOALS

### How do I delete a goal?

Goals cannot be deleted. If a goal was created in error, it may be marked Inactive. To deactivate a goal, select Inactivate Goal from the upper right.

### Should I mark a professional development goal as Inactive once it is complete?

Goals should remain active through your professional development plan window (12 months or more).

### My goal shows over 100%. How is that possible?

Creating a professional development goal includes setting the required number of training hours to meet the goal. You enter the actual training hours done when you attach one or more documents as proof of progress toward the goal completion. If the total hours in attached documents exceed the total hours for the goal, the percent complete will exceed 100%.

### If I switch employers, do my professional development goals in progress follow me?

No. Goals attached to an Agency (employer) are marked inactive when the employee is disaffiliated from the employer. However, all documents remain with the employee and may be available to be attached toward a new professional development plan with a new employer in the future if needed.

### Can I edit a goal?

You can edit a goal before any attached documents are verified by either the Agency or ECECD.

### What are considered “active goals”?

Completed and In-Progress goals from an employee's current 12-month (or other) goal plan period are considered Active.

## When should I deactivate a goal?

When an employee is disaffiliated from an Agency, professional development goals affiliated with that employer are automatically marked as Inactive. Additionally, goals from a previous professional development goal plan period may be marked inactive.

## WAGES

### What is the reason for needing my wages included in my profile?

This information supports ECECD's statewide analytics on early childhood professionals, supporting pay equity and helping guide data-driven decisions and policy improvements. An employee's wage information is kept confidential and not shared with other organizations.

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## When a new employee joins my organization, will I be able to access their prior salary

No. Wage information is confidential and accessible only to ECECD – it is not available to other organizations.

## When a new employee joins my organization, will I be able to access their prior salary history?

No. Wage information is confidential and accessible only to ECECD – it is not available to other organizations.

## HELP AND SUPPORT

### I found an issue with a resource. How do I report the issue?

Please report your findings by clicking Help and Support on the main menu and filling out the Ask ECECD form.

### Can I request a resource be added to the Resource HUB?

Yes! Please submit your request by clicking Help and Support in the main menu and filling out the Ask ECECD form.

### Where can I get additional help?

There are more resources available on the Support Hub in PDIS. If you need additional assistance, contact PDIS Support at [PDIS-Support@eecd.nm.gov](mailto:PDIS-Support@eecd.nm.gov).