Professional Development Information System (PDIS) User Guide

Agency Admins (Employers)

February 2026

New Mexico
Early Childhood
Education & Care Department

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Section 1 – Account Setup

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  - 1. Account Setup
  - 2. Complete your Profile
  - 3. Request Agency Admin Credentials
- Editing your Profile Later
- Request Agency Admin Credentials
- Frequently Asked Questions
- Help and Support

Section 1 Objectives

By the end of this topic, users will…

- Sign up for their PDIS Account.
- Understand why they must use their personal email address.
- Set their language preference.
- Enter their required personal details.
- Link their account to their employer (agency).
- Request Agency Admin credentials.
- Know how to make any edits to their profile, if needed.

Section 1 Key Terms

- Agency – An early childhood education or care employer.
- Agency Admin – An individual from your agency who can edit, approve and verify submissions:
  - Full Admin privileges allow management of all *editable fields* for an employee.
  - Limited Admin privileges allow management of *most* editable fields, excluding wage information.

The 3 Steps for First-Time PDIS Users

1

Account Setup

2

Complete your Profile

3

Request Agency Admin Credentials

1 Account Setup

PDIS is designed to follow you throughout your career, which may span several employers.

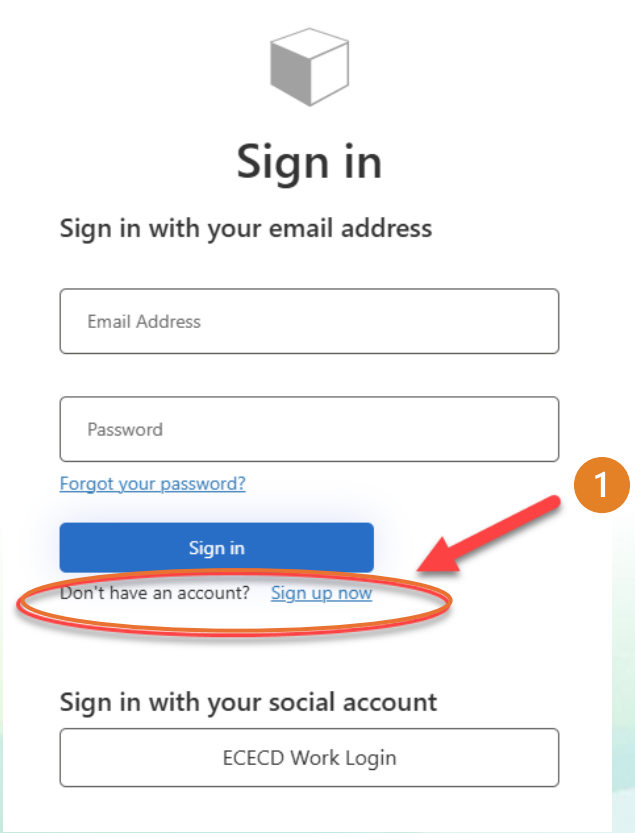
- PDIS is made to help people who work with children, store and keep their employment and training information up to date, no matter where they work.
  - When you set up your account, use **your personal email**, not your work email.
  - **This is important** because if you change jobs, your personal email and your login to PDIS will stay the same!

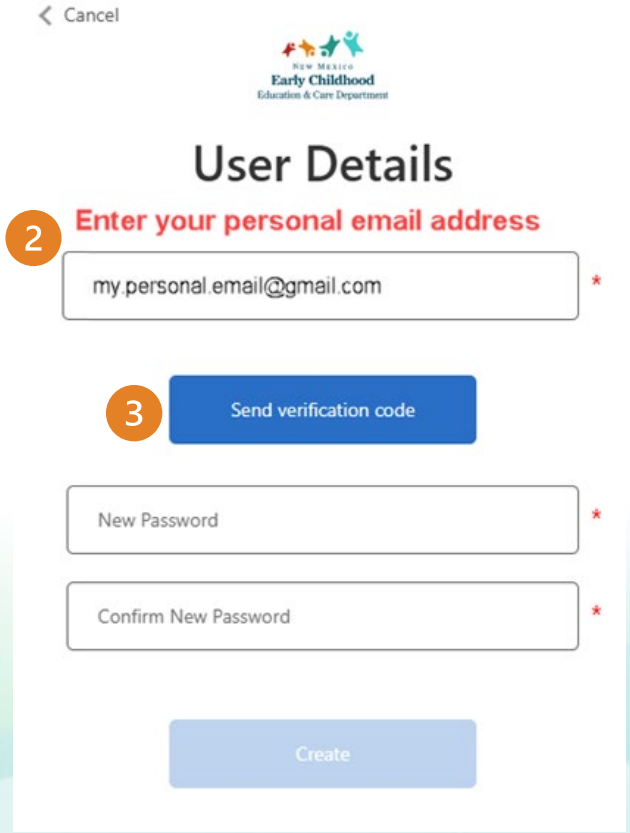
IMPORTANT: If you are *directly employed by* ***ECECD*** and fulfill the role of an Agency Admin (ex: ECECD Families FIRST), please see the appendix to set up your account.

Return to these instructions starting with Slide 13 – Complete Your Profile.

Creating your PDIS Account

1. Since you do not have an account yet, Click **Sign up now.**
2. Enter your **personal email address.**
3. Click **Send verification code** to receive a verification code by email.



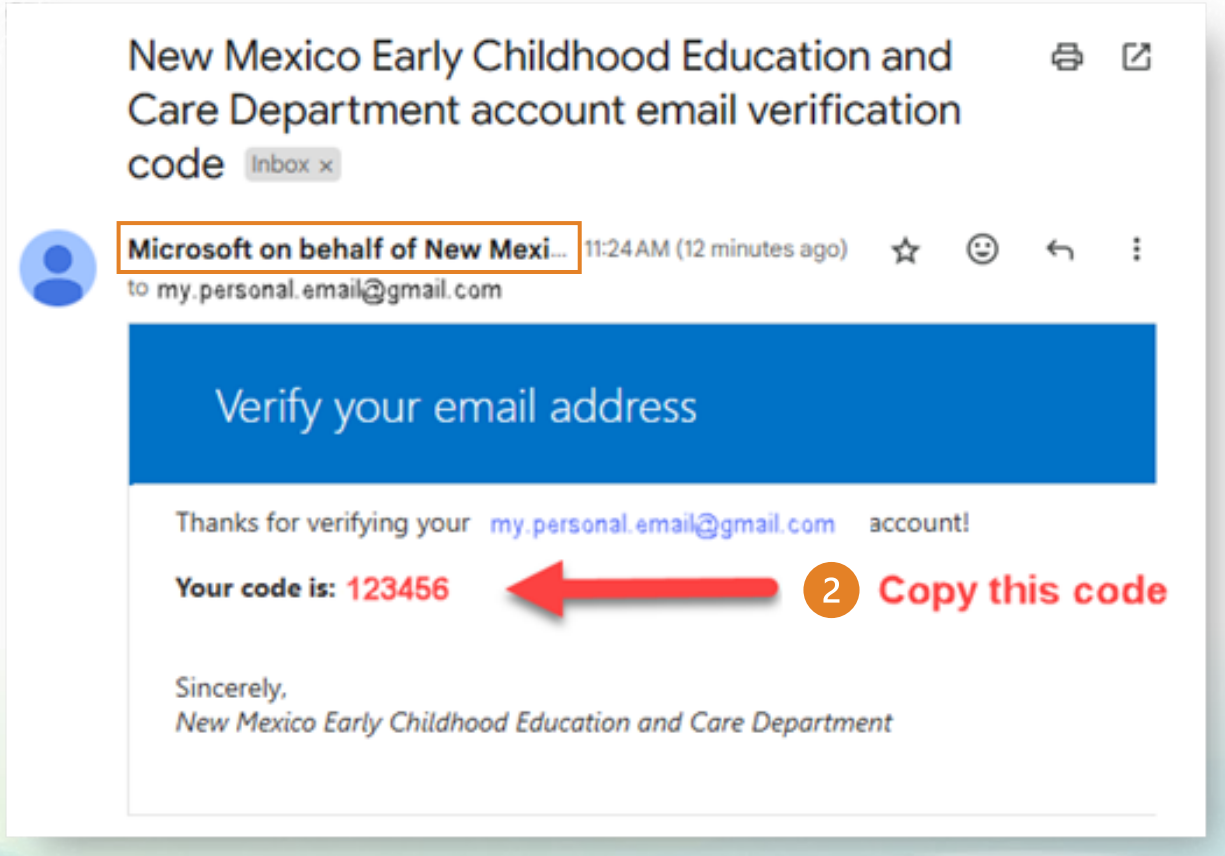


Locate your Verification Code

1. **Check for an email** from Microsoft on behalf of New Mexico Early Childhood Education and Care Department.

   This email will contain your verification code.

2. **Copy your verification code** to your clipboard or write it down.

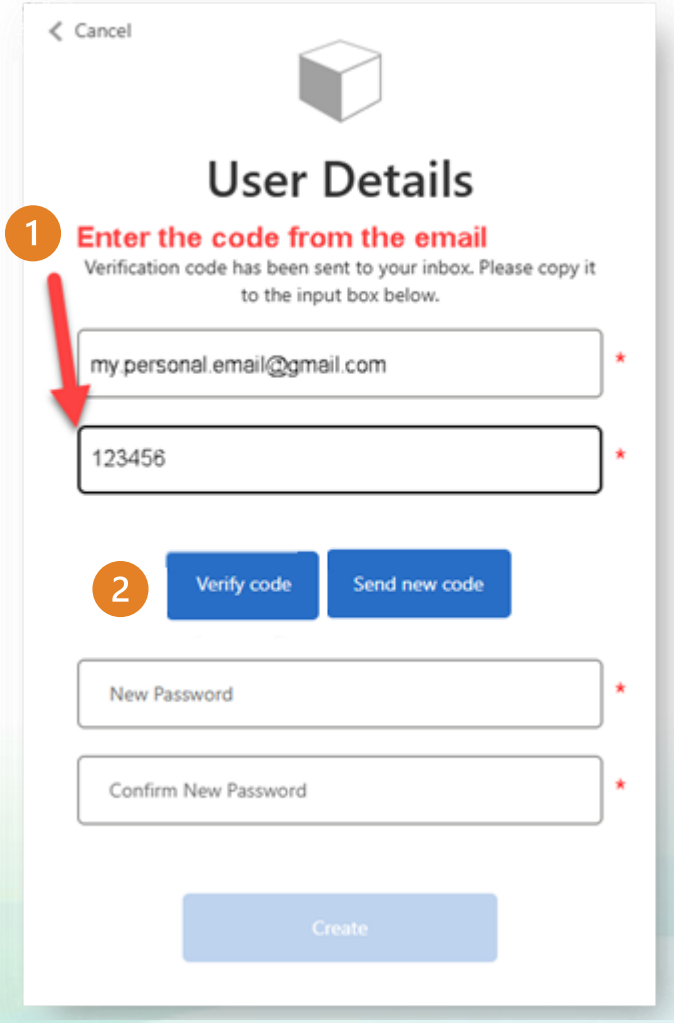


Enter your Verification Code

1. **Enter your verification code into the form.**

Code will expire after a few minutes.
If your code expires, click ***Send new code*** *to get a new code by email.*

2. **Click Verify code.**

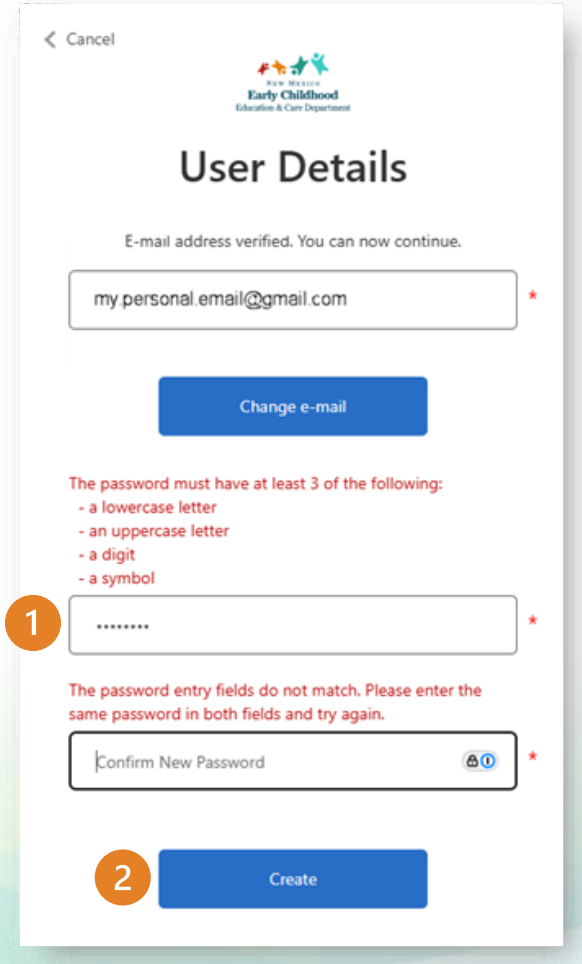


Choose a PDIS Password

Double check the email you listed. If you used a work email accidentally, you should change this to your personal email by clicking on the ***Change email*** *button, which will take you through the account setup steps again.*

1. Choose a PDIS password and re-enter below to confirm your PDIS password.

2. Click Create.



Your password must be between 8 and 64 characters, and include at least 3 of the following:

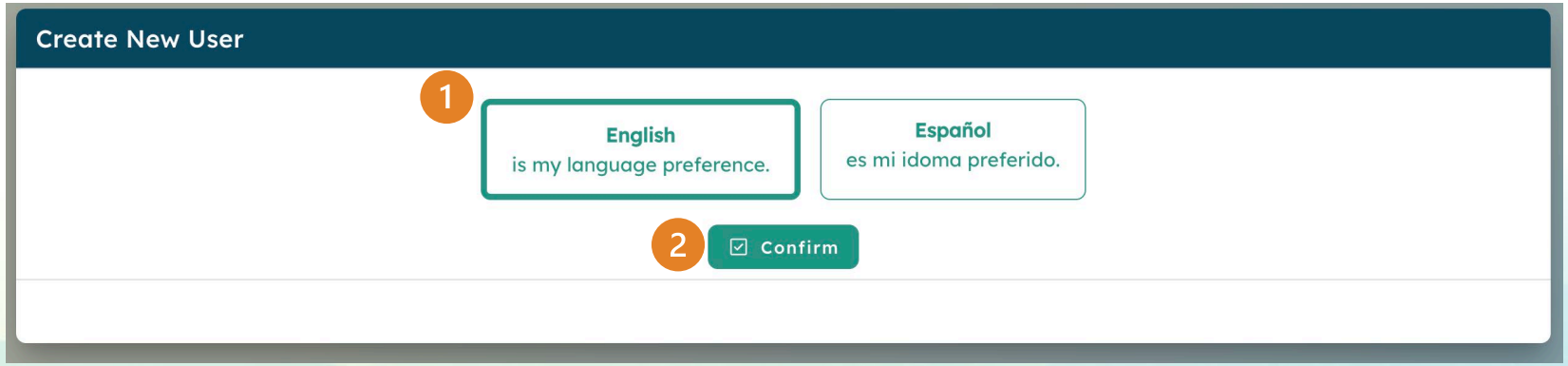
- A lowercase character
- An uppercase character
- A digit (number)
- A symbol character

2 Complete your Profile

Now that you have completed creating your PDIS account you will be asked a few questions.

1. Select your **preferred display language** for PDIS. (English or Spanish).

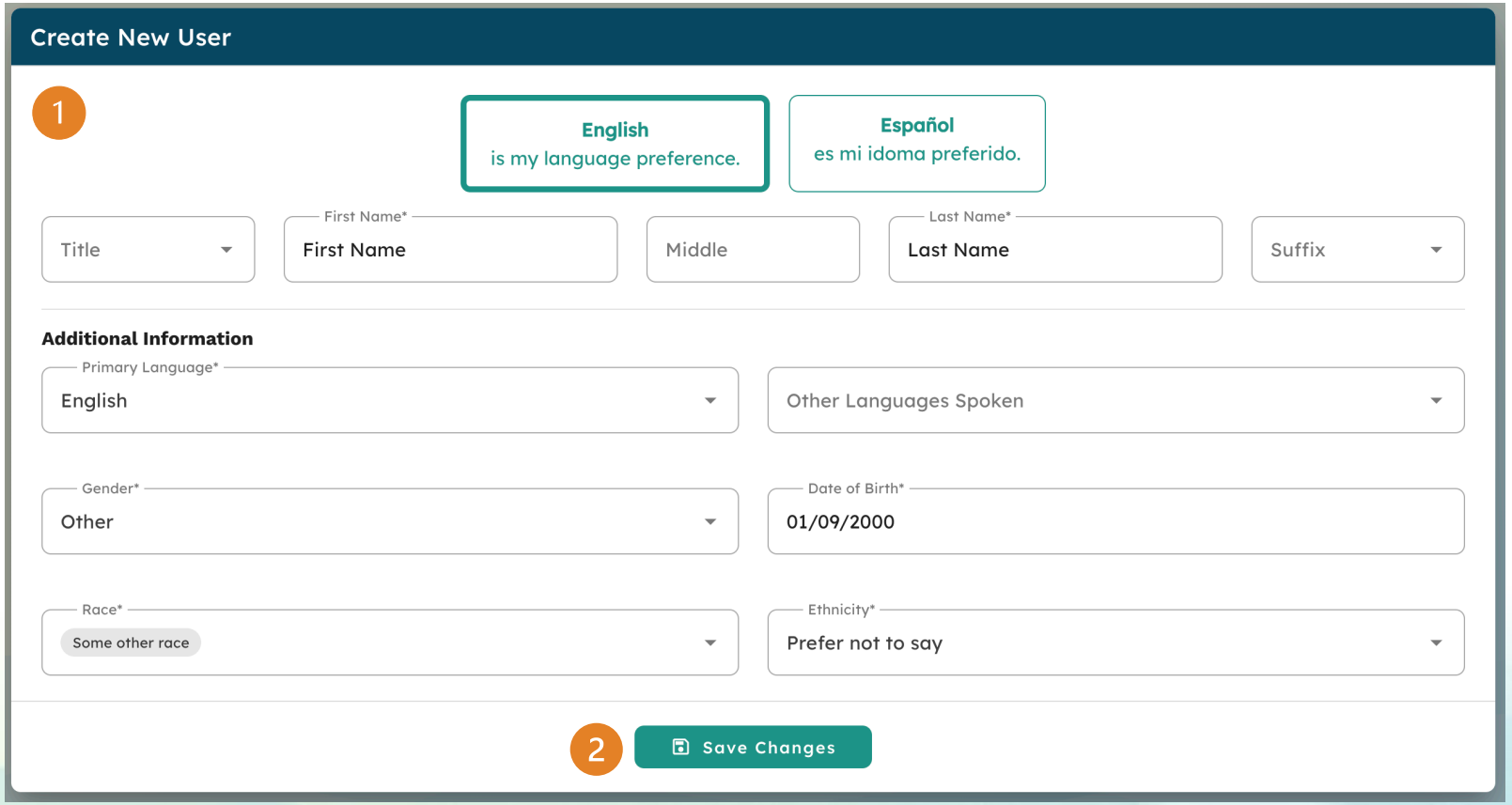
2. Click **Confirm.**



Complete New User Form

1. **Complete the form** (*All boxes with a * must be answered).*

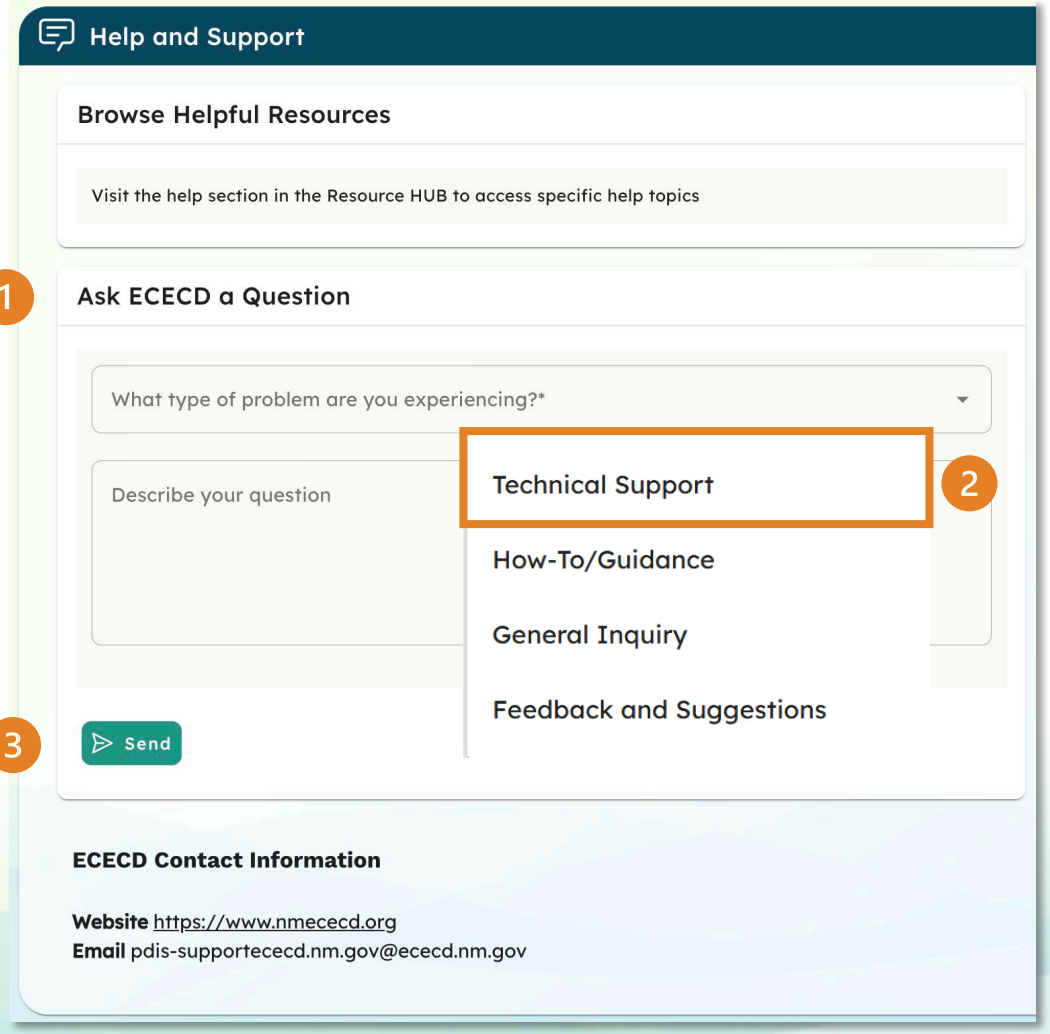
2. Click **Save Changes.**



3 Request Agency Admin Credentials

To have ECECD establish you as an Agency Admin:

1. Go to **Help and Support – Ask ECECD a Question**.
2. Select **Technical Support** from the dropdown menu. Make a request, including the information on the next page, to be established as an **Agency Admin**.
3. Click **Send**.



You will be assigned either **FULL or LIMITED** agency privileges, based on the level of information you need to access.
Full privileges allow management of all *editable fields* for an employee.
Limited privileges allow access to *most* editable fields, excluding wage information.

Gather Agency Information

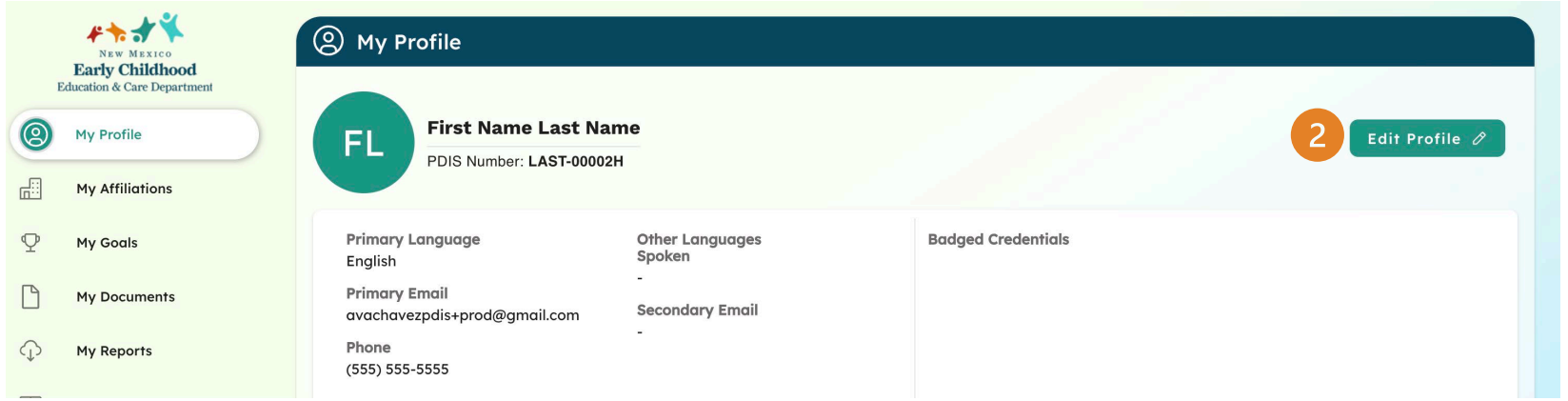
Before you request your agency admin credentials, you will need the following information about your agency to submit along with your request in the **Help and Support** tab:

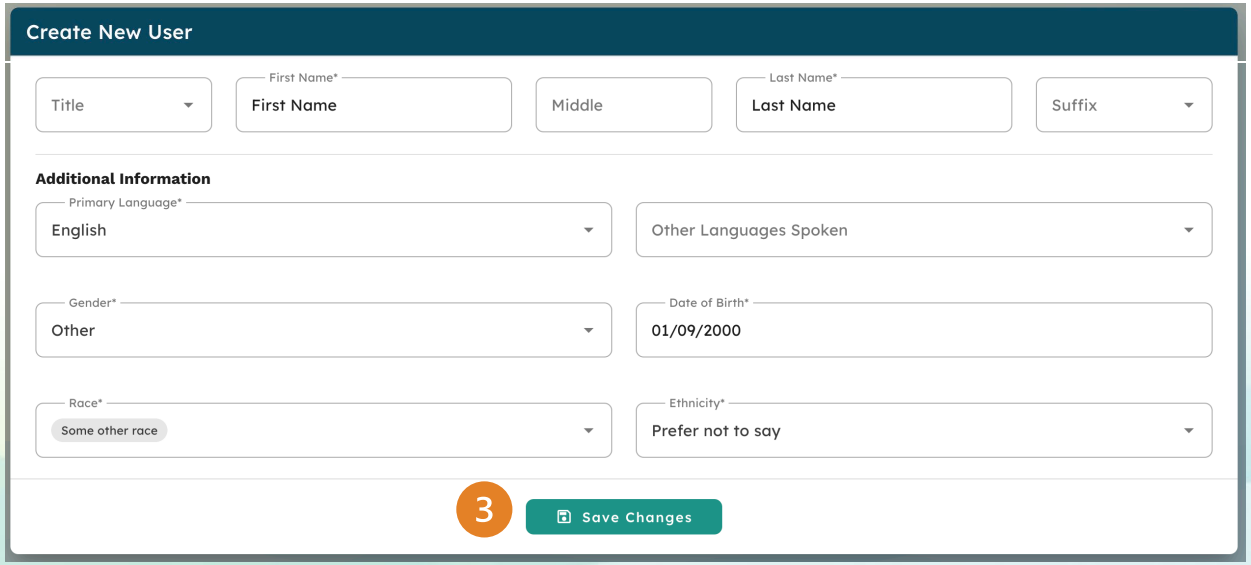
- EPICS ID.
- Location Name.
- Location Address.
- Program Setting(s).
- Counties Served.
- Phone.
- Website URL.

Edit your Profile

If you need to edit details from your profile later.

1. Go to **My Profile**.
2. Click **Edit Profile**.
3. Make changes and click **Save Changes**.





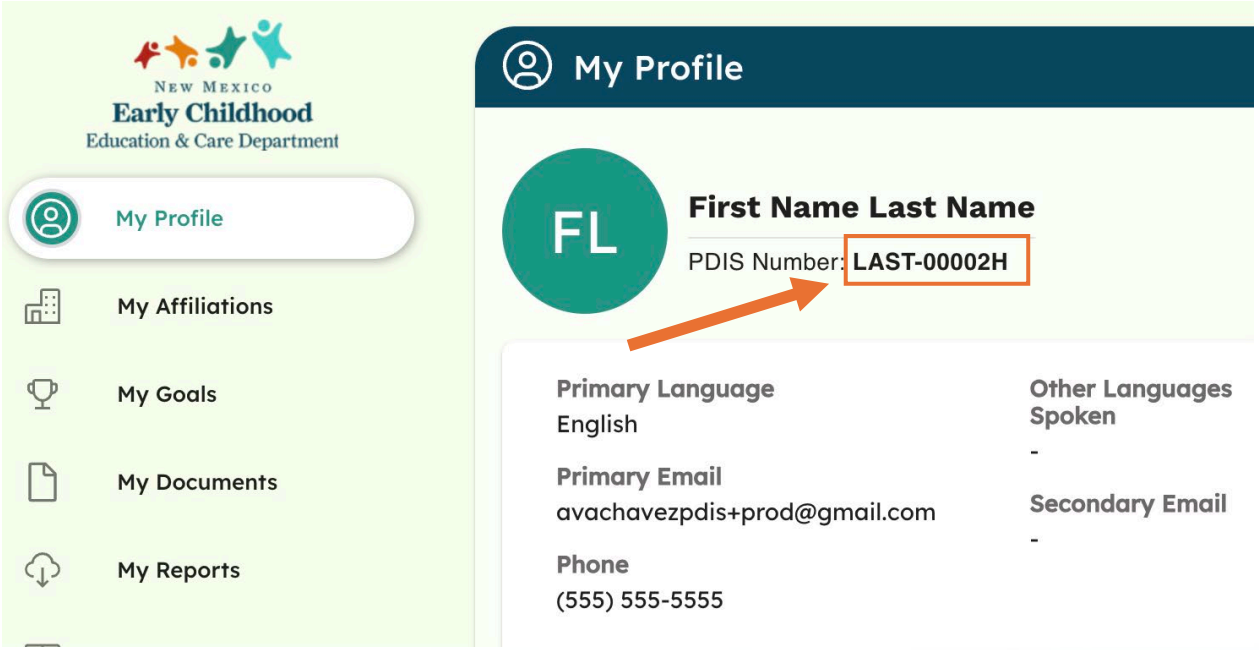
Section 1 Frequently Asked Questions

Question: Where is my PDIS Number?

Answer: Your PDIS number is located under your name on the **My Profile** page.

Question: Why can't I edit some fields?

Answer: Some fields may be tied to your background check and can not be changed within PDIS.



Section 2 – Roster Management

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- Objectives
- Key Terms
- My Agencies – Navigation
- The 3 Steps to Your Employee Roster
- Editing Your Employee Roster
- Frequently Asked Questions
- Help and Support

Section 2 Objectives

By the end of this topic, users will…

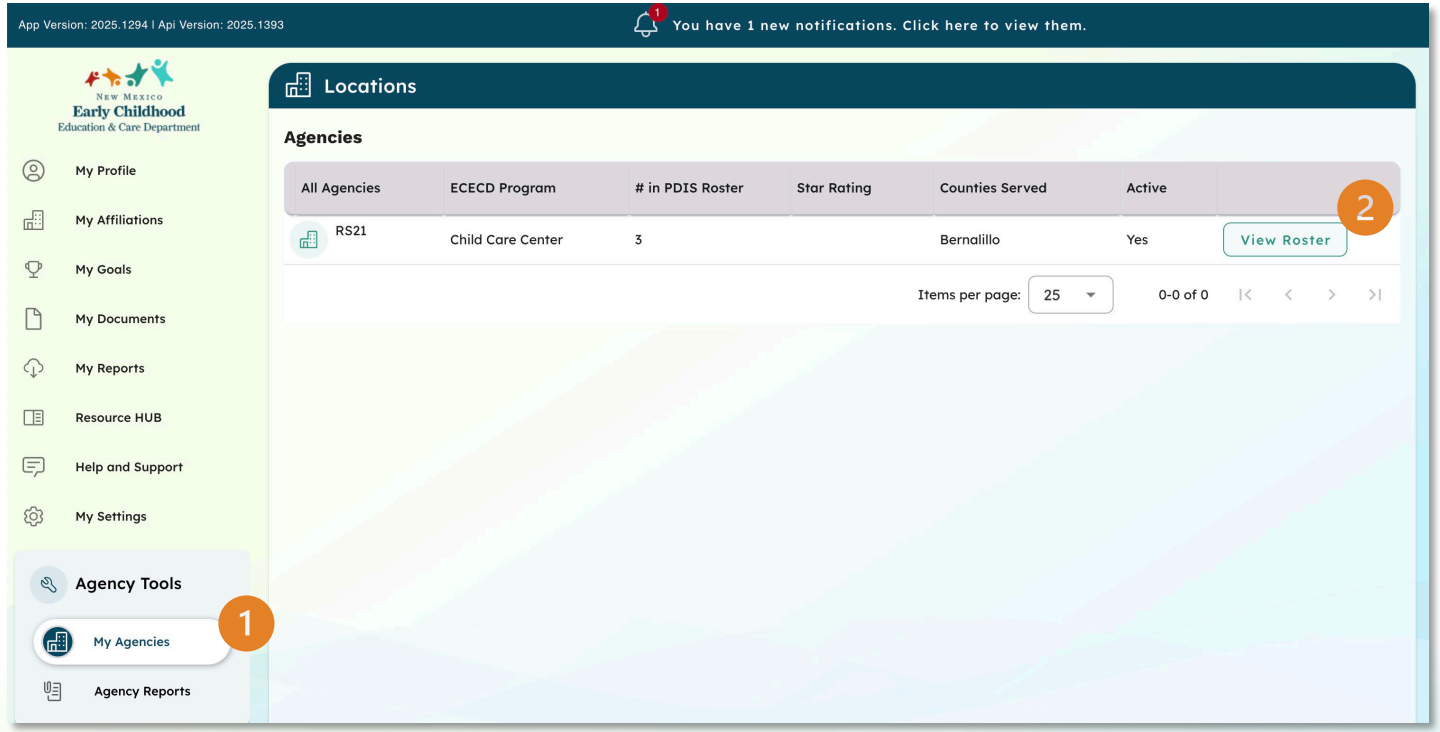
- Know how to update your employee roster to add or remove an employee.
- Know how to send a new employee an invite to join PDIS.
- Understand the difference between Active, Pending, and Inactive Affiliations.
- Know how to update an employee’s profile information, role, or wage.
- Know how to link a background check for an employee.

Section 2 Key Terms

- Affiliation – A relationship where an early childhood professional is employed by an agency.
- Agency – An early childhood education or care employer.
- Agency Admin – An individual from your agency who can edit, approve and verify submissions.
  - Full Admin privileges allow management of all *editable fields* for an employee.
  - Limited Admin privileges allow management of *most* editable fields, excluding wage information.
- Employee – An early childhood professional.

My Agencies – Navigation

1. Click **My Agencies** from the **Agency Tools** menu.
2. Click **View Roster** for the roster you would like to manage.

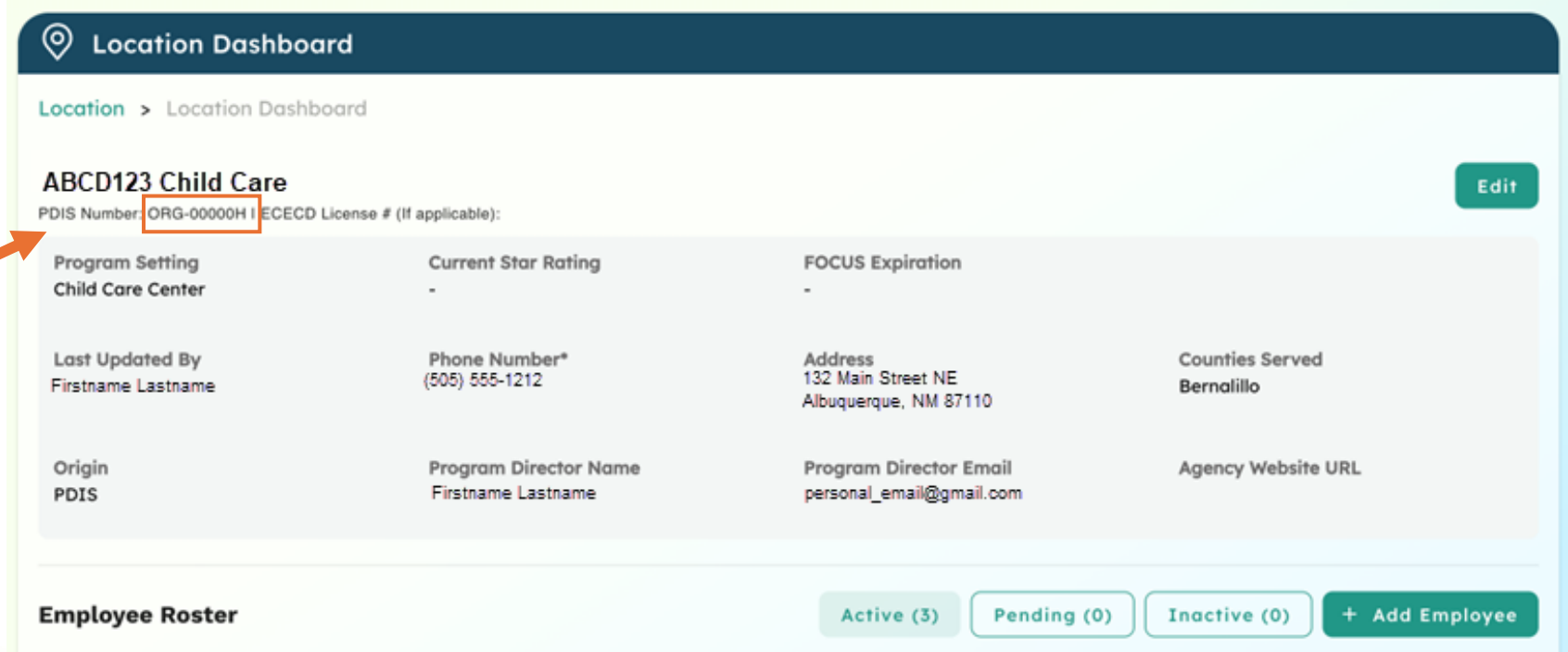


If you have permission to manage multiple Agency Rosters, they will all appear on this list.

My Agencies – Agency Profile Information

At the top of the page, you will notice information about your agency, like the:

- **PDIS Number** for your Agency.
- Information about your agency.



Agency Profile information can be edited only by ECECD. Please reach out to them for any changes.

The 3 Steps to Create Your Employee Roster

1

Add Employees with PDIS Accounts.

2

Invite Employees without PDIS Accounts to Join.

3

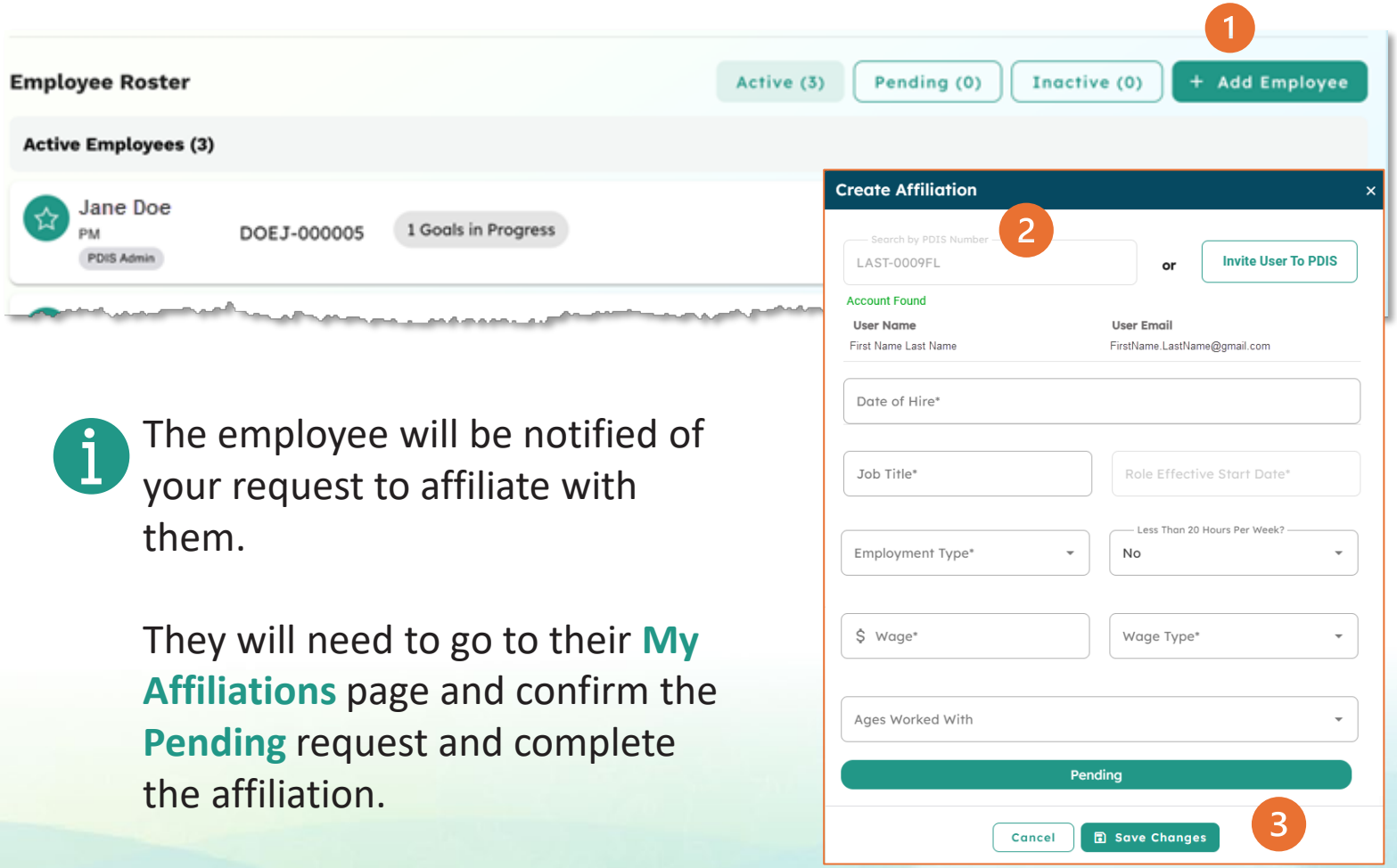
Understand Active, Pending, & Inactive Affiliations.

1 Add Employees with PDIS Accounts

If your employee already has a PDIS account.

From **My Agencies** | **View Roster**:

1. Click **Add Employee**.
2. In the **Create Affiliation** form, enter their PDIS number (which they will need to give you).
3. Enter the employee's job details and **Save Changes**.



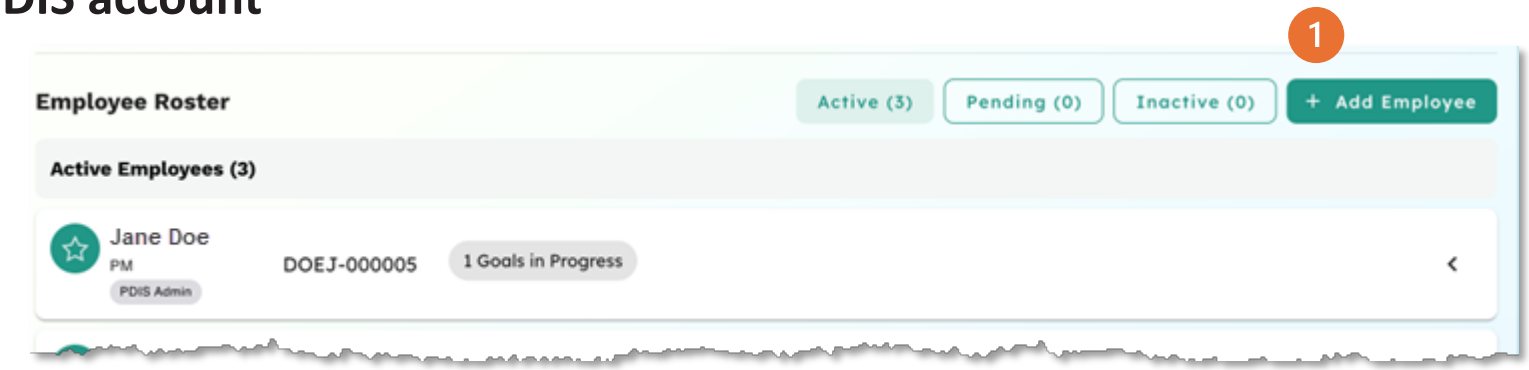
The employee will be notified of your request to affiliate with them.

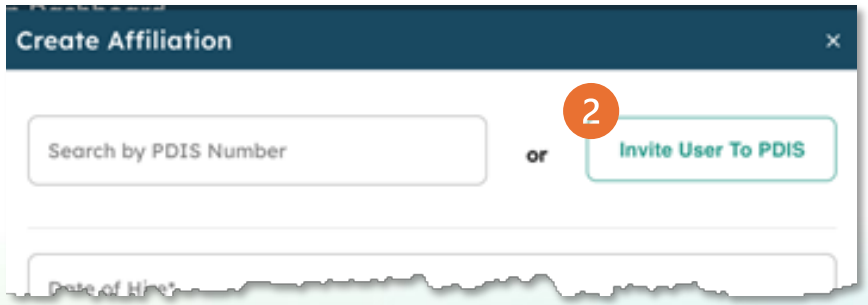
They will need to go to their **My Affiliations** page and confirm the **Pending** request and complete the affiliation.

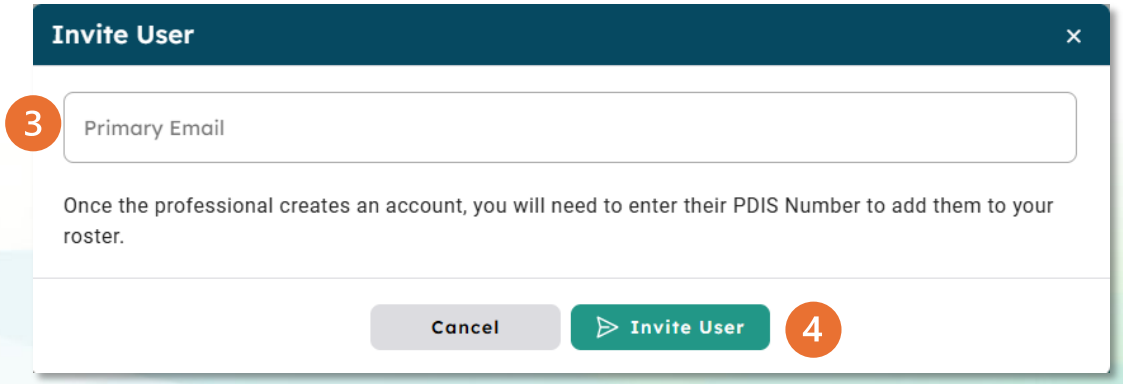
2 Invite Employees without PDIS Accounts

If your employee does not have a PDIS account

1. Click **Add Employee**.
2. Click **Invite User To PDIS**.
3. Enter employee's **personal** email address.
4. Click **Invite User**.







Additional Information on Adding Employees

If your employee does not have a PDIS account

The employee will receive an email in English and Spanish with a link to PDIS, instructions on how to set up their profile and how to request an affiliation with your **Agency**.
When you are notified of their request to affiliate, you may then confirm their **Pending** request and complete the affiliation.

If the employee already has a PDIS account, they may click the link in the email to log in and follow the instructions to request an affiliation with your **Agency**. Alternately, they may give you their PDIS number and you may follow the steps on the previous page.

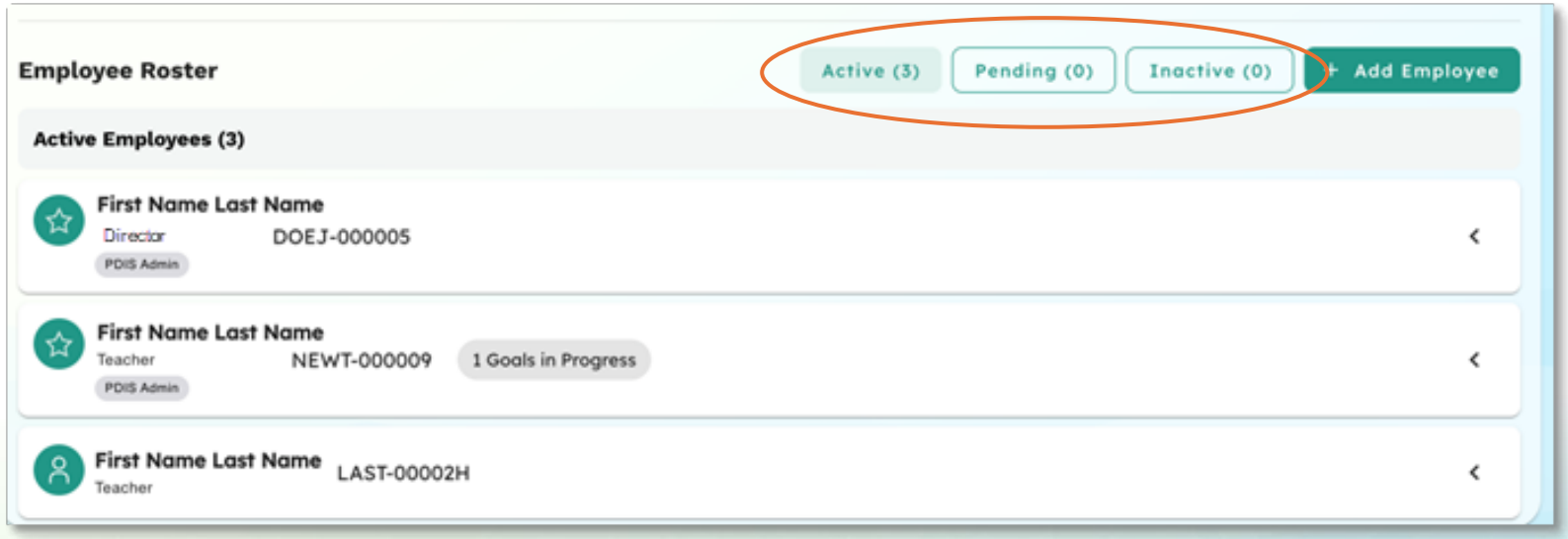
3 Understand Active, Pending, & Inactive Affiliations

Your roster includes all individuals that have an affiliation with you.

A. **Active Affiliations**: users who are currently affiliate with your agency.

B. **Pending Affiliations**: users that are waiting to be affiliated with your agency.

C. **Inactive Affiliations**: users that used to be affiliated with your agency.



Active Roster – Collapsed View

Each employee in your roster has a row that expands and collapses.
When **collapsed** you can view:

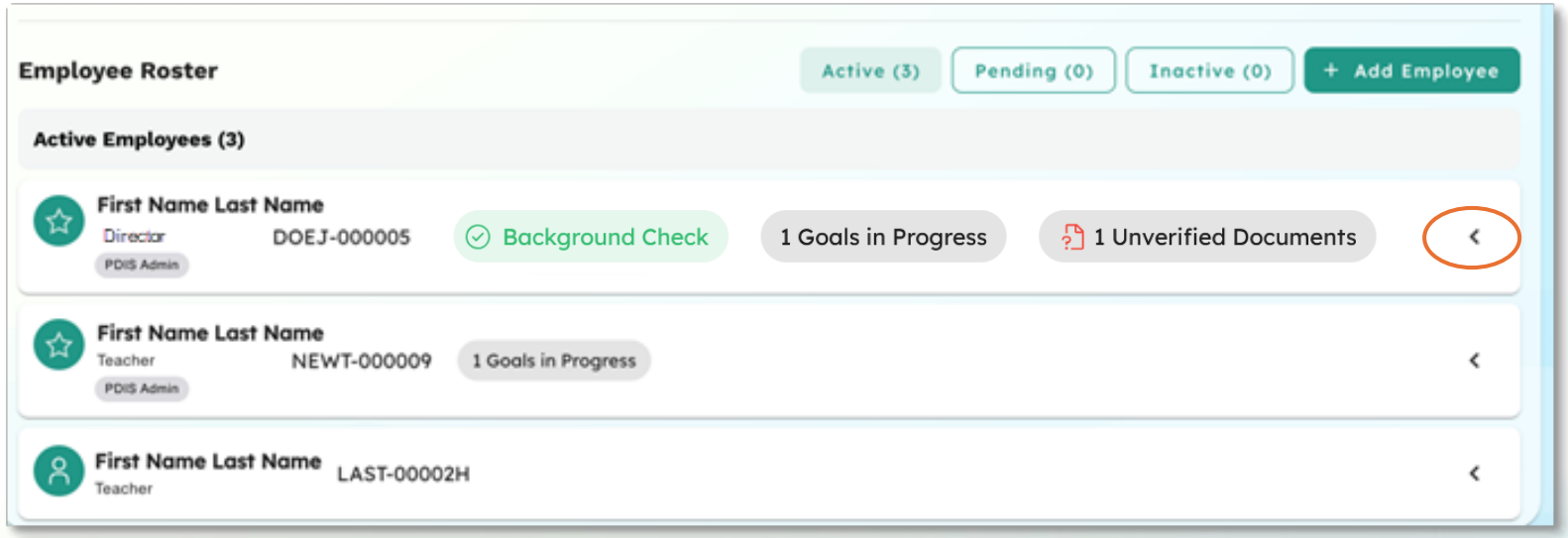
A. Employee Name.

B. Job Title.

C. PDIS Admin badge (if they have been granted admin privileges to also manage your Agency's roster).

D. PDIS Number.

E. Background Check



F. Number of Goals in Progress.

G. Number of Unverified Documents.

Active Roster – Expanded View

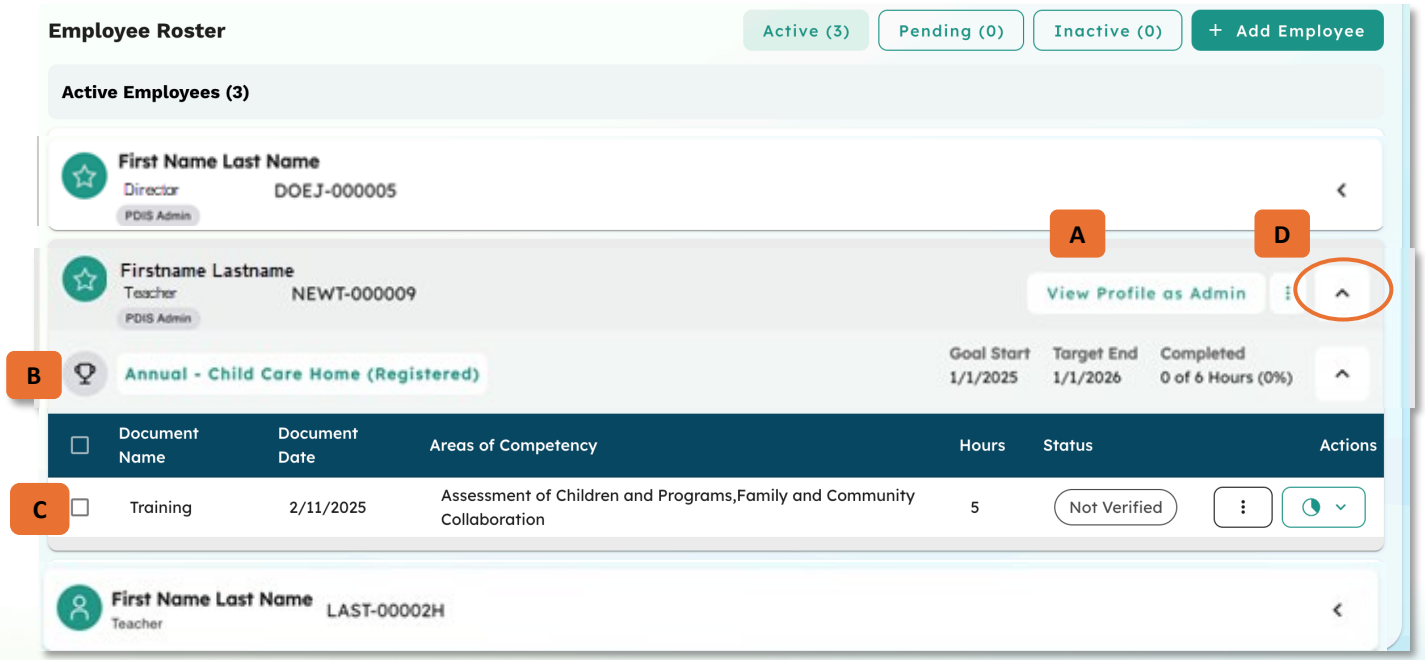
Each employee in your roster has a row that expands and collapses. When **expanded**, you can perform **Roster Management** functions:

A. Go to an employee's PDIS profile and click **View Profile** as **Admin**.

B. View and Manage **Active Goals**.

C. View, Manage, and Verify **Documents attached to Goals**.

D. Click the three-dot menu to access other **Roster Management** functions.

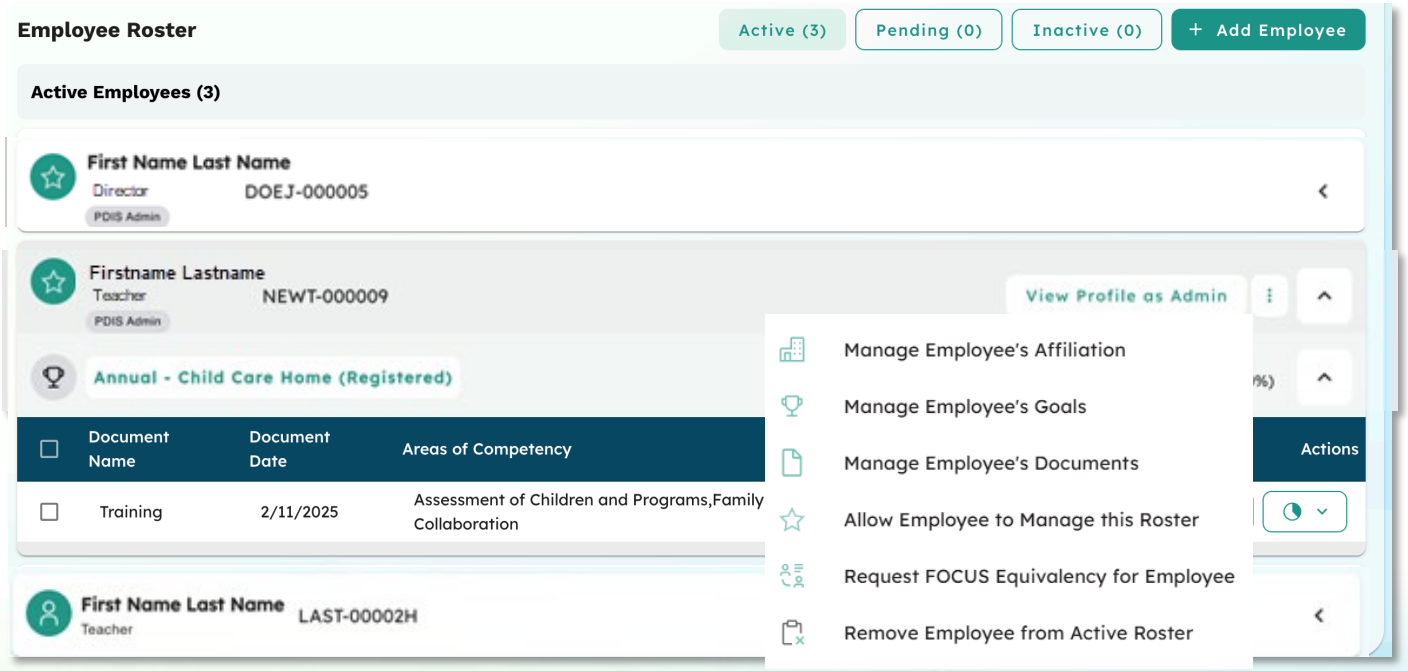


Active Roster – Additional Functions

As an employer, you can access **Roster Management** functions using the three-dot menu on the active employee's **Expanded View.**

Click the three-dot menu to access these Roster Management functions:

- **Manage Employee's Affiliation** - update job details like title and wage.
- **Manage Employee's Goals.**
- **Manage Employee's Documents.**
- **Allow Employee to Manage this Roster** – grant employee permission to do everything you can do as a PDIS Admin for this Agency's Employee Roster.
- **Request FOCUS Equivalency Review**
- **Remove Employee from Active Roster** – (**Disaffiliate**) use if the employee no longer is employed with you.



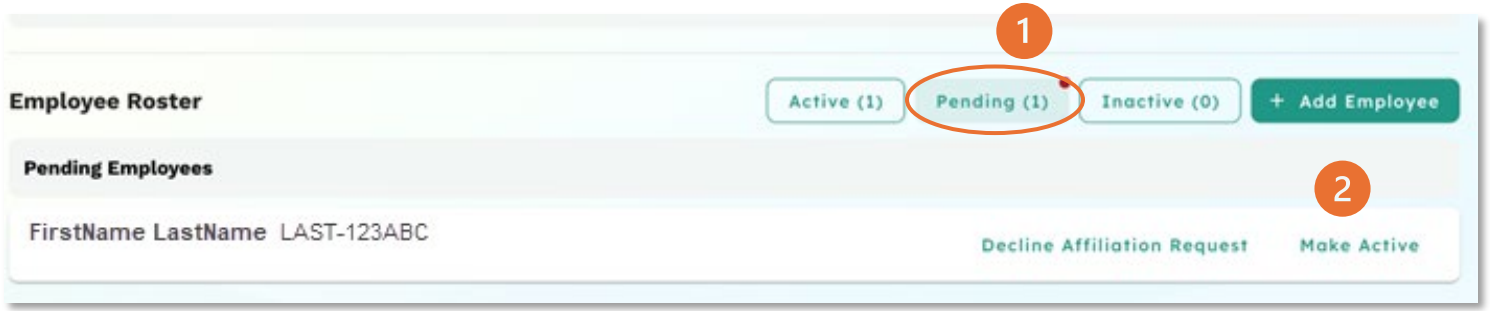
Pending Roster

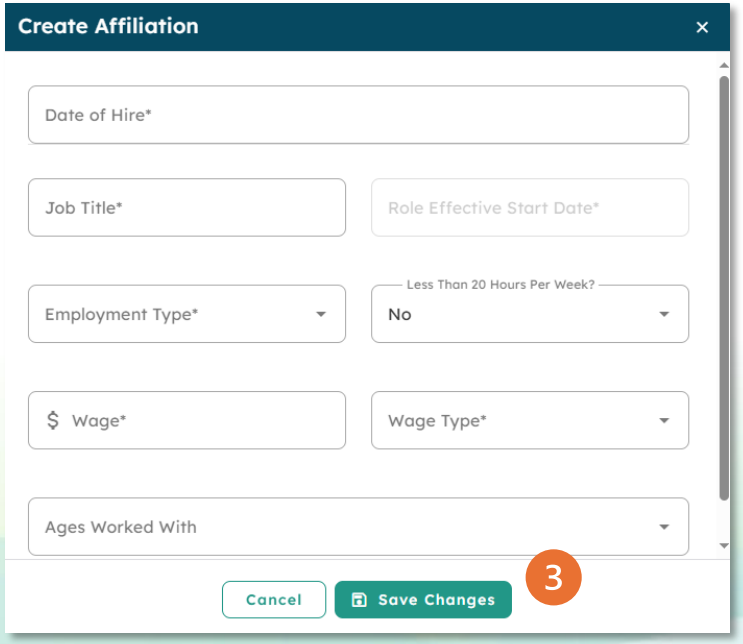
Your **Pending Roster** will show you pending affiliation request that your employee might have sent to you:

1. Click **Pending.**

2. To confirm a request and add the employee to your Active Roster, click **Make Active** (or you may **Decline Affiliation Request**).

3. For Active employees, enter the employee's job details on the **Create Affiliation** form and **Save Changes.**



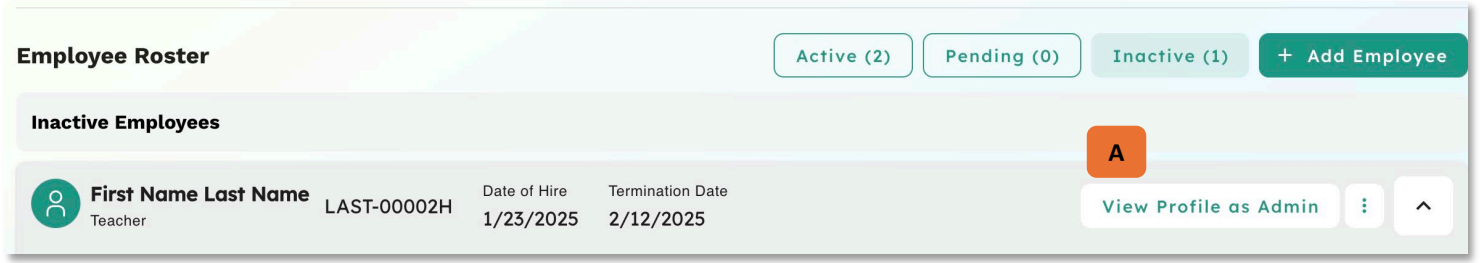


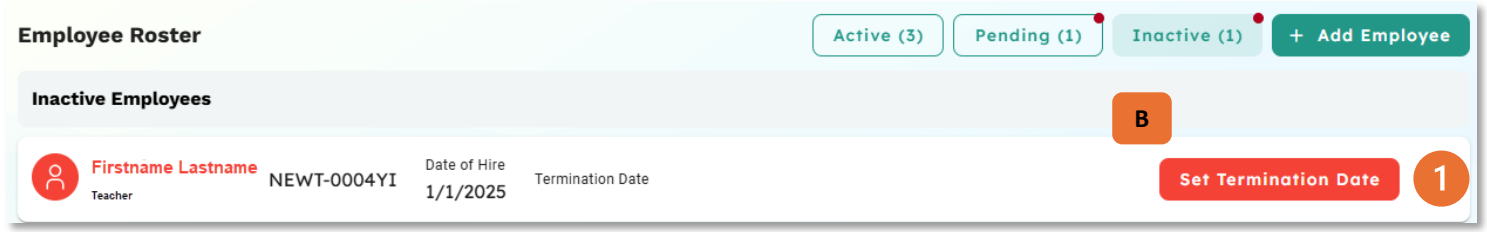
Inactive Roster

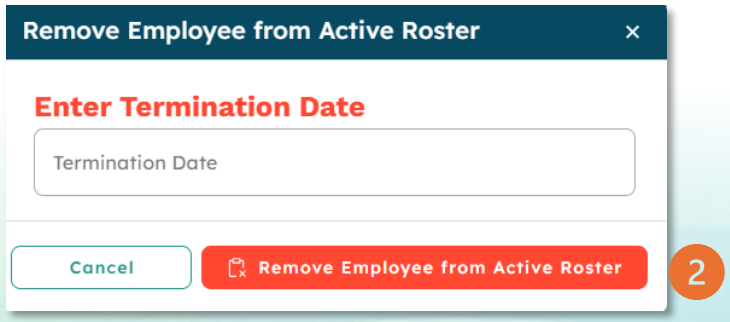
The **Inactive Affiliations** section keeps a record of your Agency's previously affiliated employees.

A. Click **View Profile as Admin** – to see a snapshot of this employee's profile from the **date of termination**. If the employee is re-hired, you can use the three-dot menu to **Request Affiliation**.

B. If the employee initiates a **Disaffiliation**, you will be prompted to enter the termination date:
   1. Click **Set Termination Date.**
   2. Enter **Date of Termination** then click **Remove Employee from Active Roster.**







Editing Details of Employees on Your Roster

1

Edit Profile Information.

2

Change Role.

3

Change Wage.

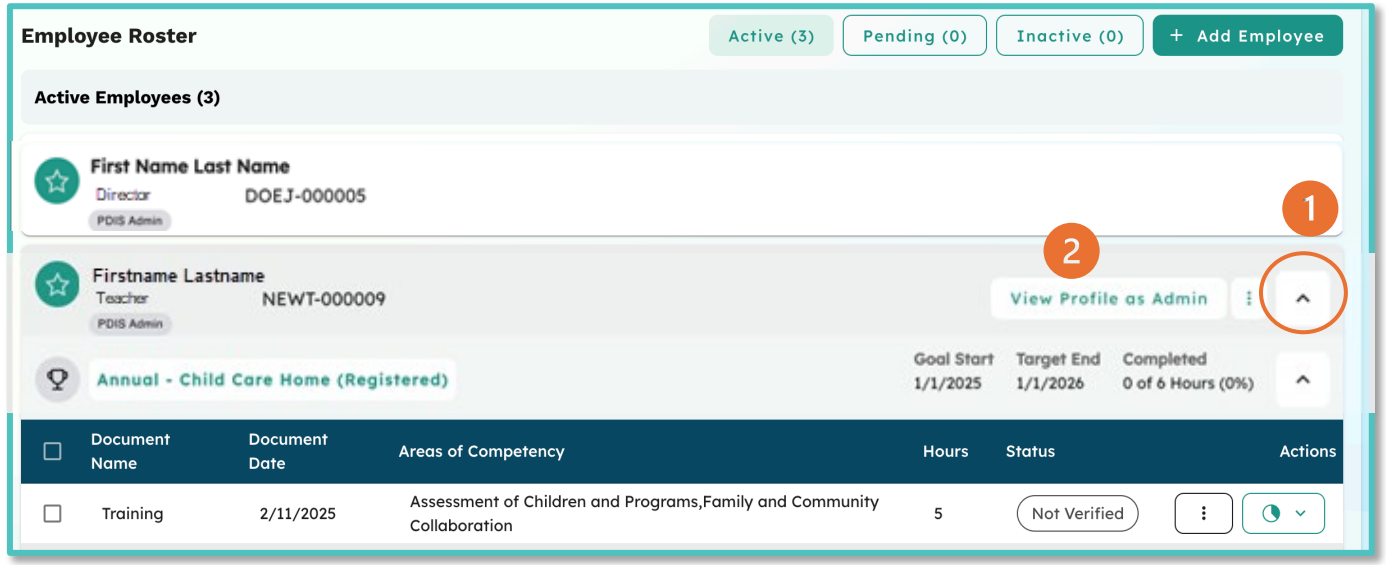
4

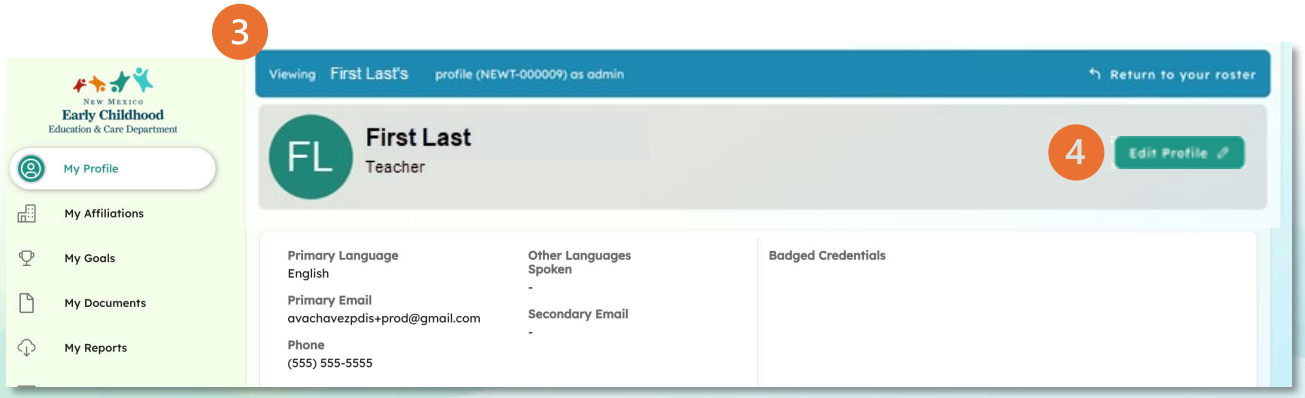
Link Background Check.

1 Edit Employee Profile

Use the **Active, Expanded View** to access the path to view your employee's profile page.

1. Expand the Employee row.
2. Click **View Profile as Admin.**
3. Make sure you have opened the correct employee. You are now viewing the employee's profile page.
4. If you need to update one or more fields in the employee's profile, click **Edit Profile.**





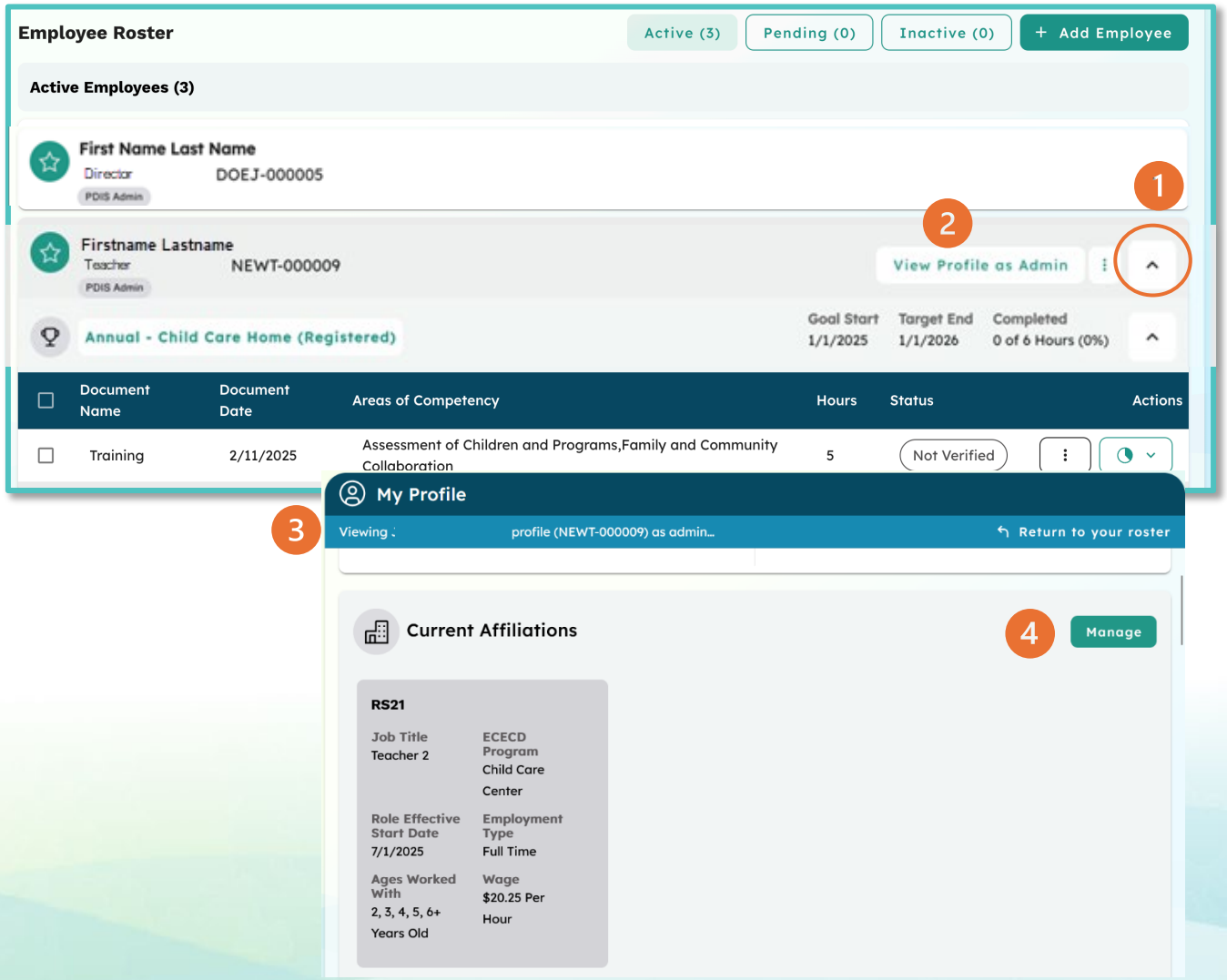
Some fields may be tied to other ECECD systems and cannot be changed within PDIS.

2 Change Role (1/2)

Use the **Active, Expanded View** to access the path to view your employee's profile page.

1. Expand the Employee row.
2. Click **View Profile as Admin.**
3. Make sure you have opened the correct employee. You are now viewing the employee's profile page.
4. If you need to update one or more fields in the employee's job role, click **Manage** under **Current Affiliations.**

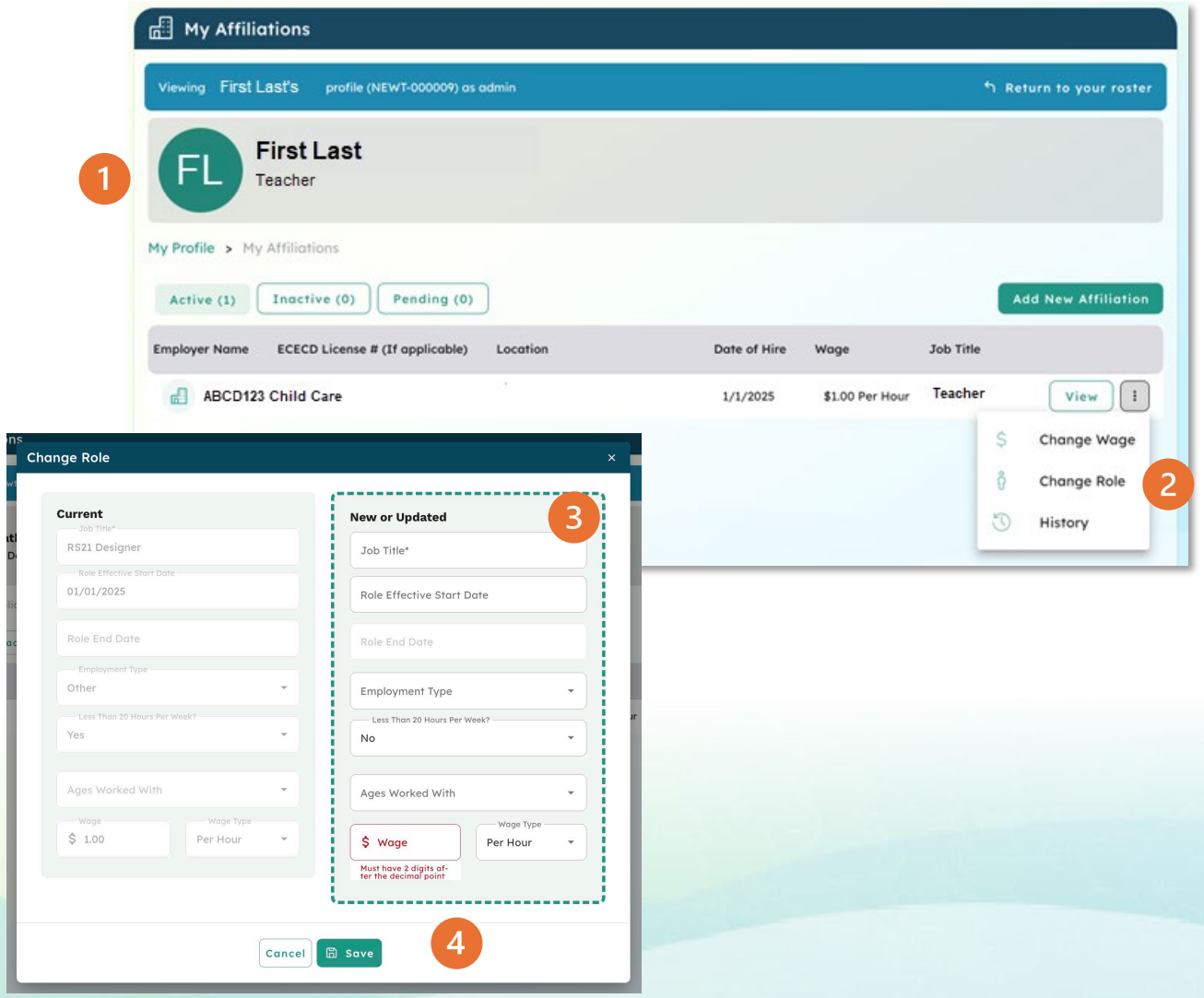
Some fields may be tied to other ECECD systems and cannot be changed within PDIS.



Change Role (2/2)

When you are viewing an Employee's profile and details, you will see a banner at the top of the page.

1. Make sure you have opened the correct employee.
2. Click the three-dot menu and select **Change Role.**
3. Add new **Job Title** and other required job details.
4. Click **Save.**

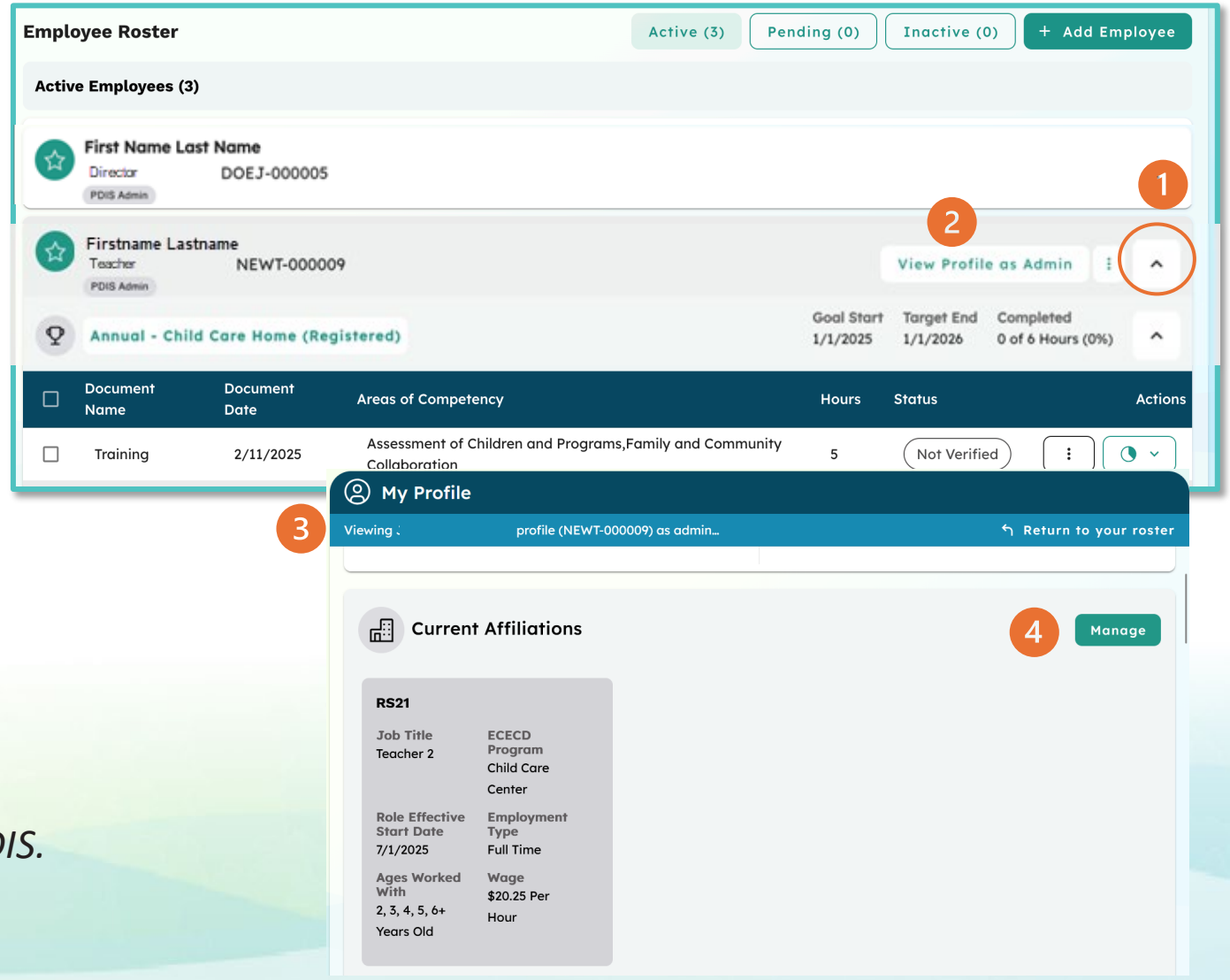


3 Change Wage (1/2)

Use the **Active, Expanded View** to access the path to view your employee's profile page.

1. Expand the Employee row.
2. Click **View Profile as Admin.**
3. Make sure you have opened the correct employee. You are now viewing the employee's profile page.
4. If you need to update one or more fields in the employee's job role, click **Manage** under **Current Affiliations.**

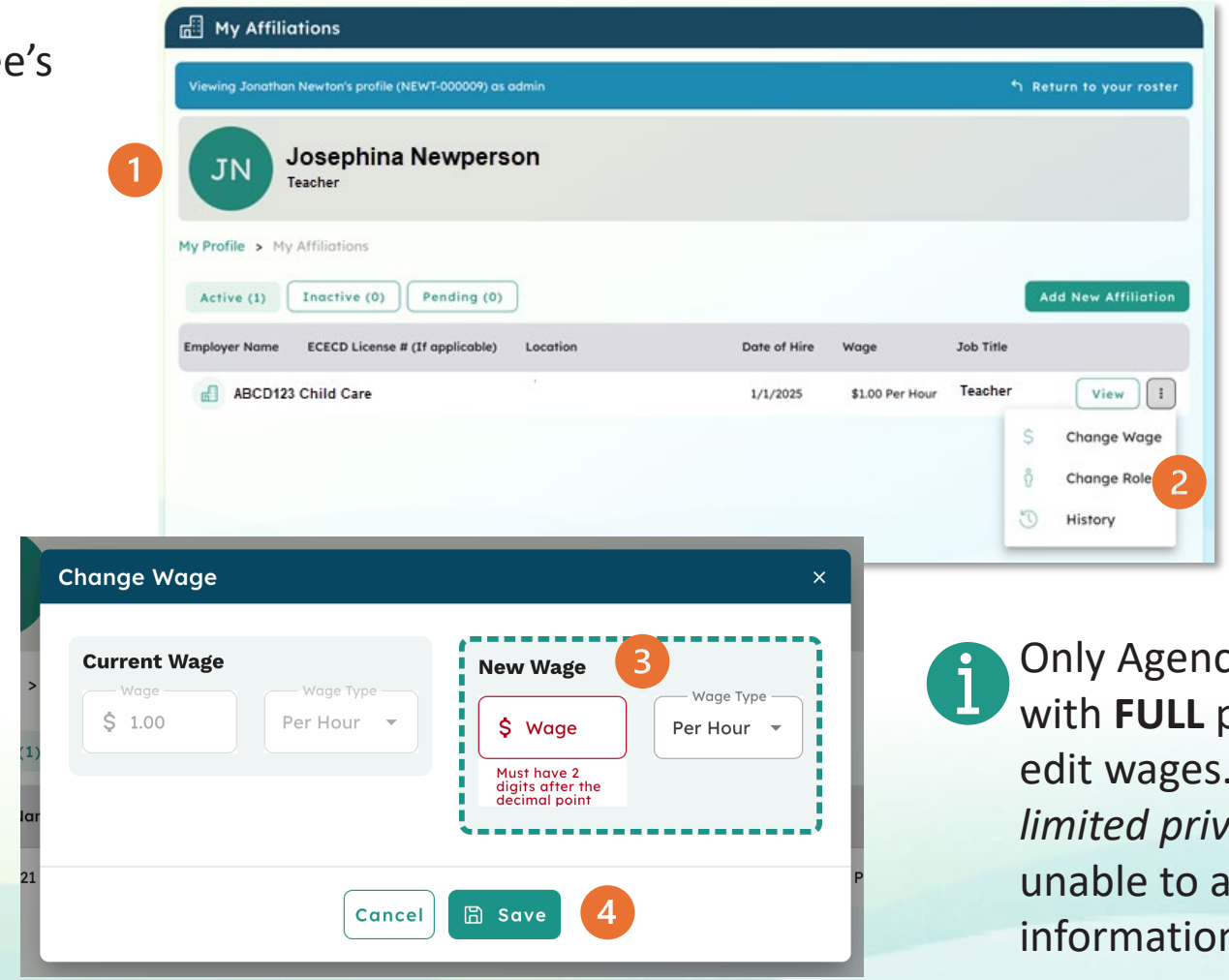
Some fields may be tied to other ECECD systems and cannot be changed within PDIS.



Change Wage (2/2)

When you are viewing an Employee's profile and details, you will see a banner at the top of the page.

1. Make sure you have opened the correct employee.
2. Click the three-dot menu and select **Change Wage.**
3. Enter the new wage and select **Per Hour** or **Per Year.**
4. Click **Save.**



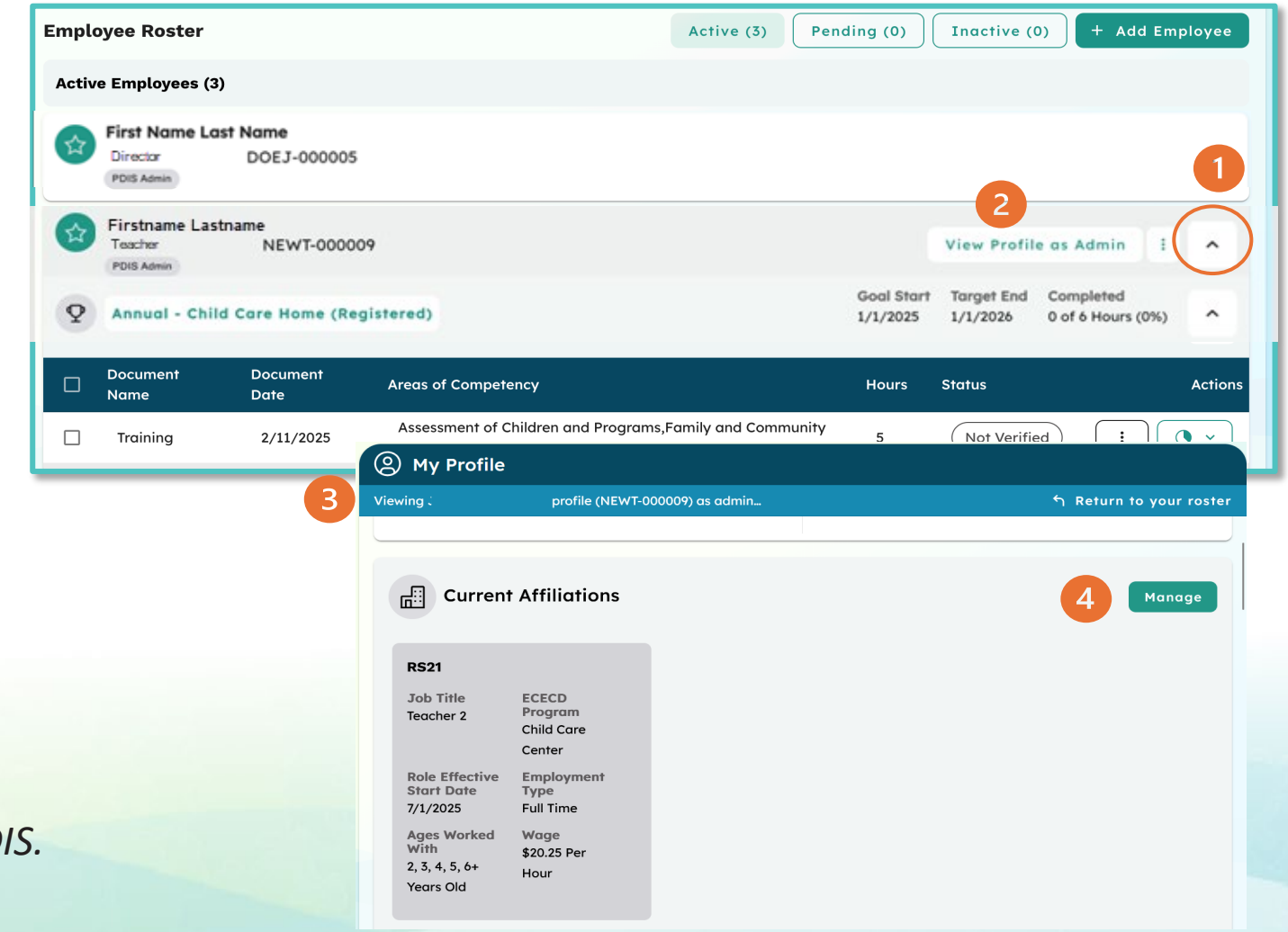
Only Agency Admins with **FULL** privileges can edit wages. Those with *limited privileges* are unable to access this information.

View Job History (1/2)

Use the **Active, Expanded View** to access the path to view your employee's profile page.

1. Expand the Employee row.
2. Click **View Profile as Admin.**
3. Make sure you have opened the correct employee. You are now viewing the employee's profile page.
4. If you need to update one or more fields in the employee's job role, click **Manage** under **Current Affiliations.**

Some fields may be tied to other ECECD systems and cannot be changed within PDIS.



View Job History (2/2)

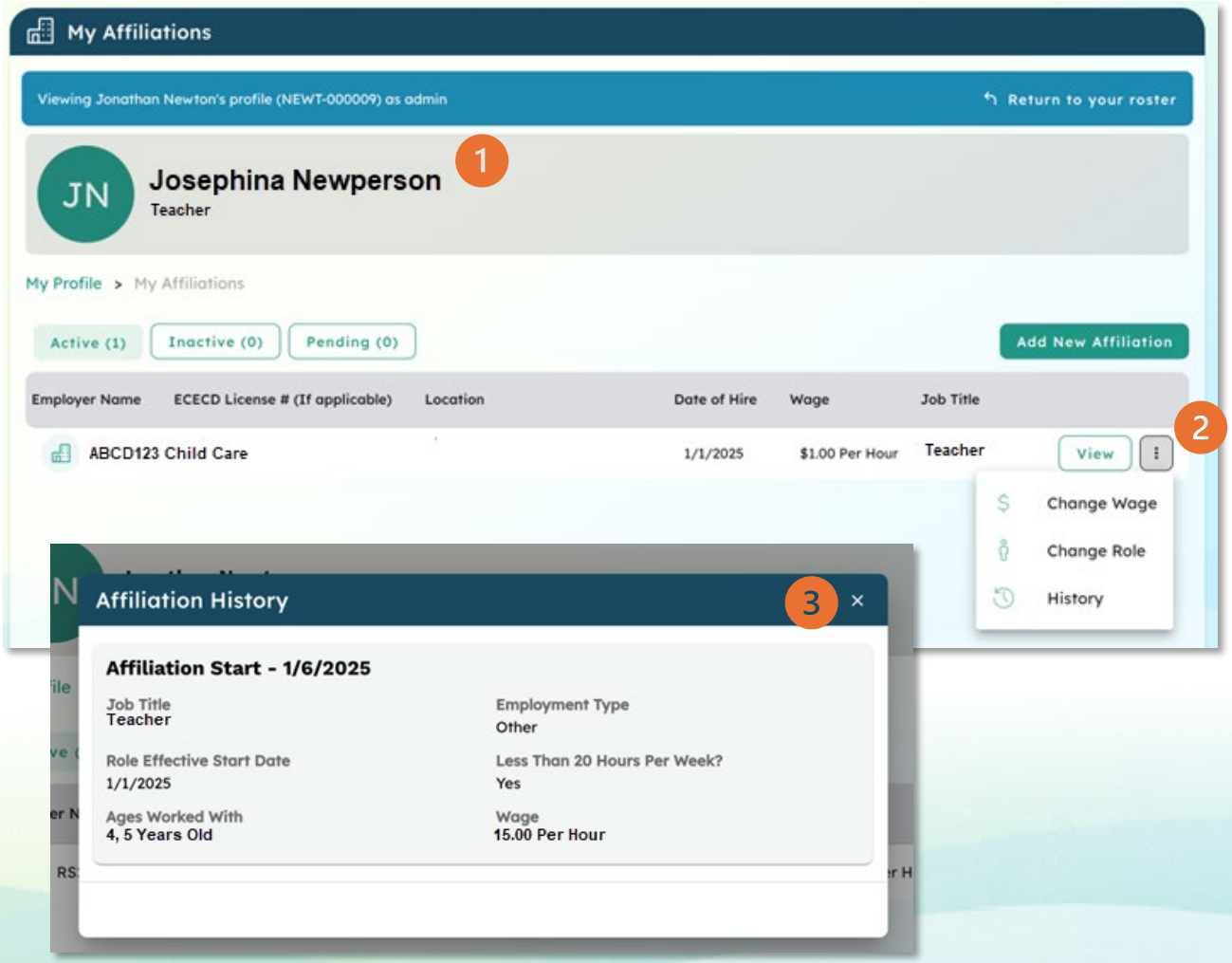
When you are viewing an Employee's profile and details, you will see a banner at the top of the page.

1. Make sure you have opened the correct employee.

2. Click the three-dot menu and select **View History.**

*The **History** window will list your Agency's current affiliation as well as any past affiliation details for this employee.*

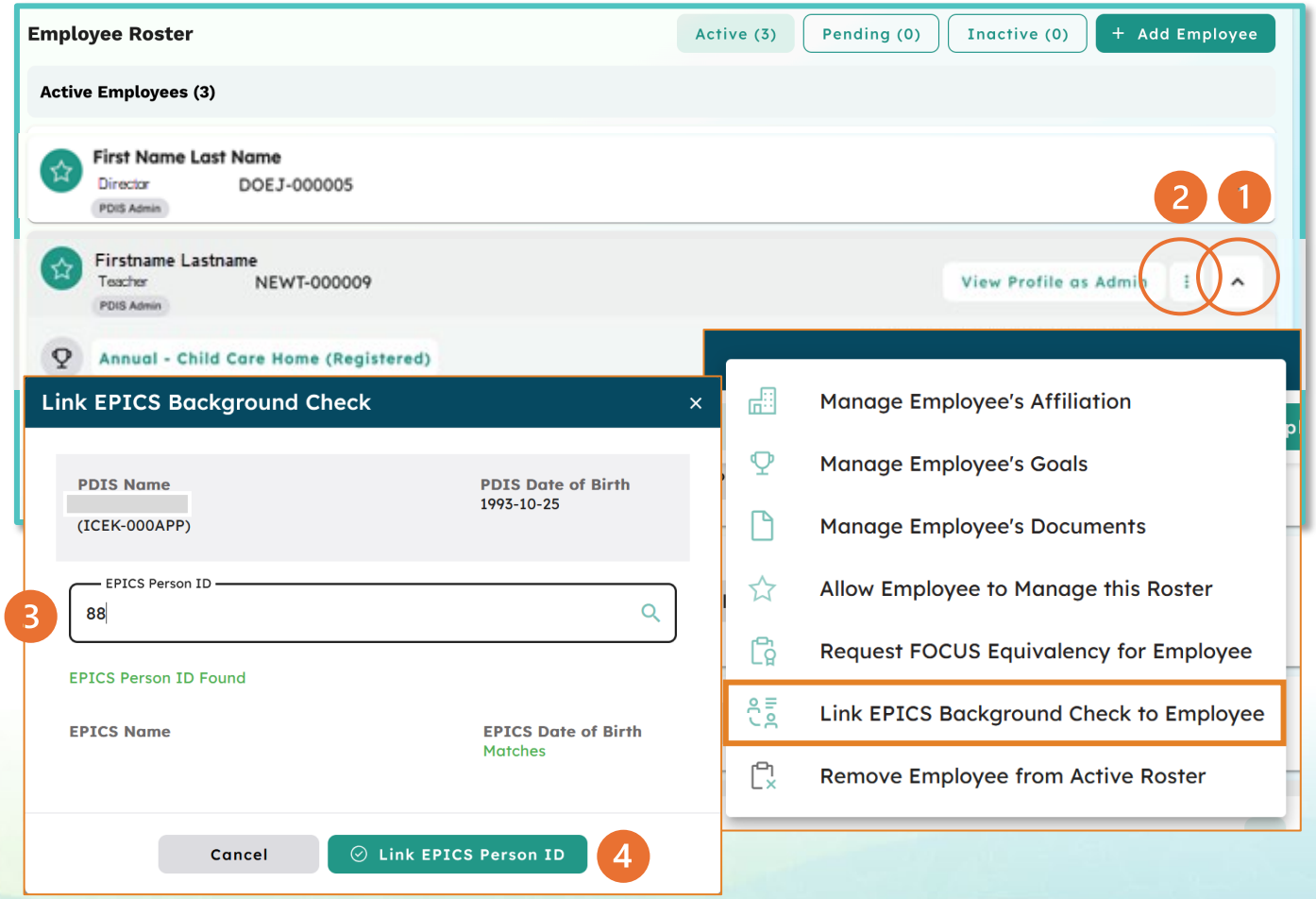
3. Click the **X** to close this window.



4 Link Background Check

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access the path to view your employee's profile page.

1. Expand the Employee row.
2. Click the **three-dot menu** and select **Link EPICS Background Check to Employee.**
3. Enter EPICS Person ID & Click **magnifying glass icon.** If a match is found in EPICS, the result will display.
4. Click **Link EPICS Person ID.** You'll be prompted to verify the match. After verifying, click, **Yes, Link Background Check.**



Section 2 Frequently Asked Questions

Question: How can I change my agency profile information?
Answer: This can only be done by ECECD. Please reach out to us (PDIS-support@ececd.nm.gov) for any changes that are needed.

Question: What is my employee's PDIS number?
Answer: 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.

Question: What is my employee's EPICS number?
Answer: If you are trying to link an employee background check, your employee will need to give you their EPICS number after they pass their background check.

Section 3 – Document Management

Section 3 Table of Contents

- Objectives
- Key Terms
- Manage Employee Documents
- Requesting a FOCUS Equivalency Review
- Frequently Asked Questions
- Help and Support

Section 3 Objectives

By the end of this topic, users will…

- Be able to manage an employee's goal supporting documents, including:
  - Adding,
  - Previewing,
  - Downloading,
  - Editing,
  - Searching & filtering.
- Request a FOCUS Equivalency Review.

Section 3 Key Terms

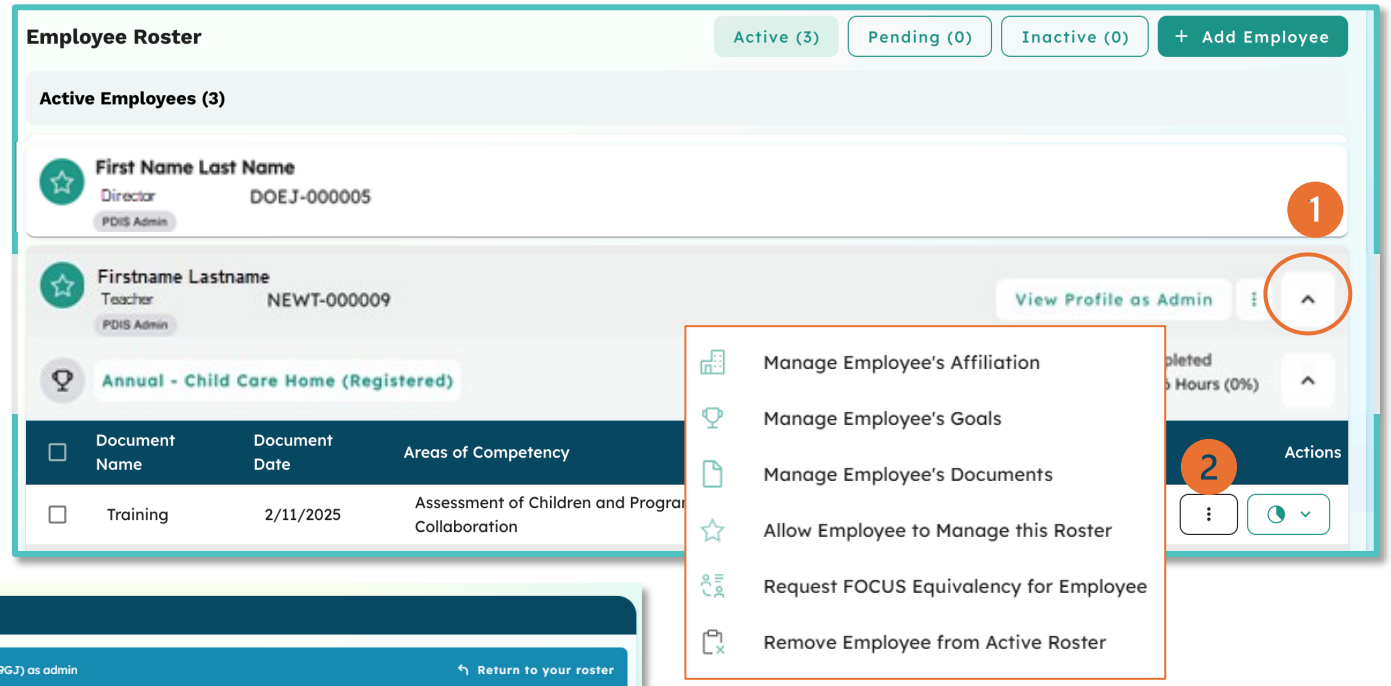
- Affiliation – A relationship where an early childhood professional is employed by an agency.
- Agency – An early childhood education or care employer.
- Agency Admin – An individual from an agency who can edit, approve and verify submissions.
  - Full Admin privileges allow management of all *editable fields* for an employee.
  - Limited Admin privileges allow management of *most* editable fields, excluding wage information.
- Employee – An early childhood professional.

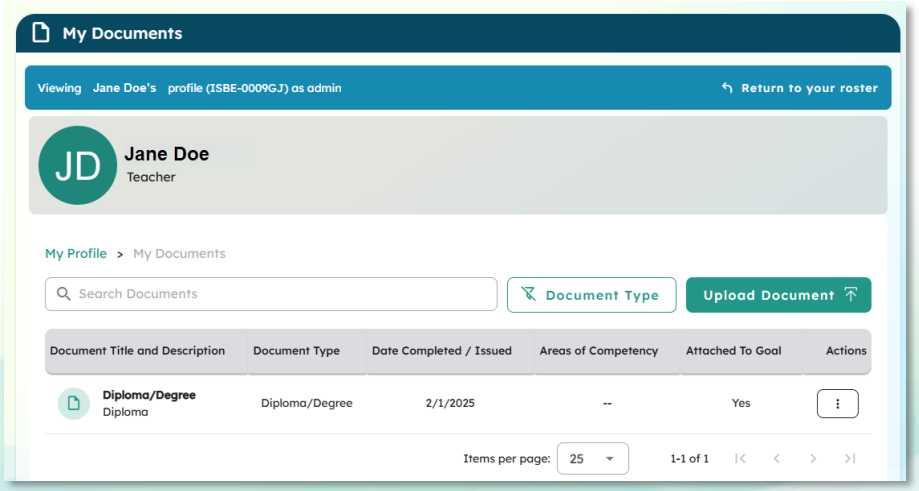
Manage Documents – Navigation

In PDIS, the relationship between an employee and an employer Agency is called an **Affiliation**.

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Document Management** for your employee.

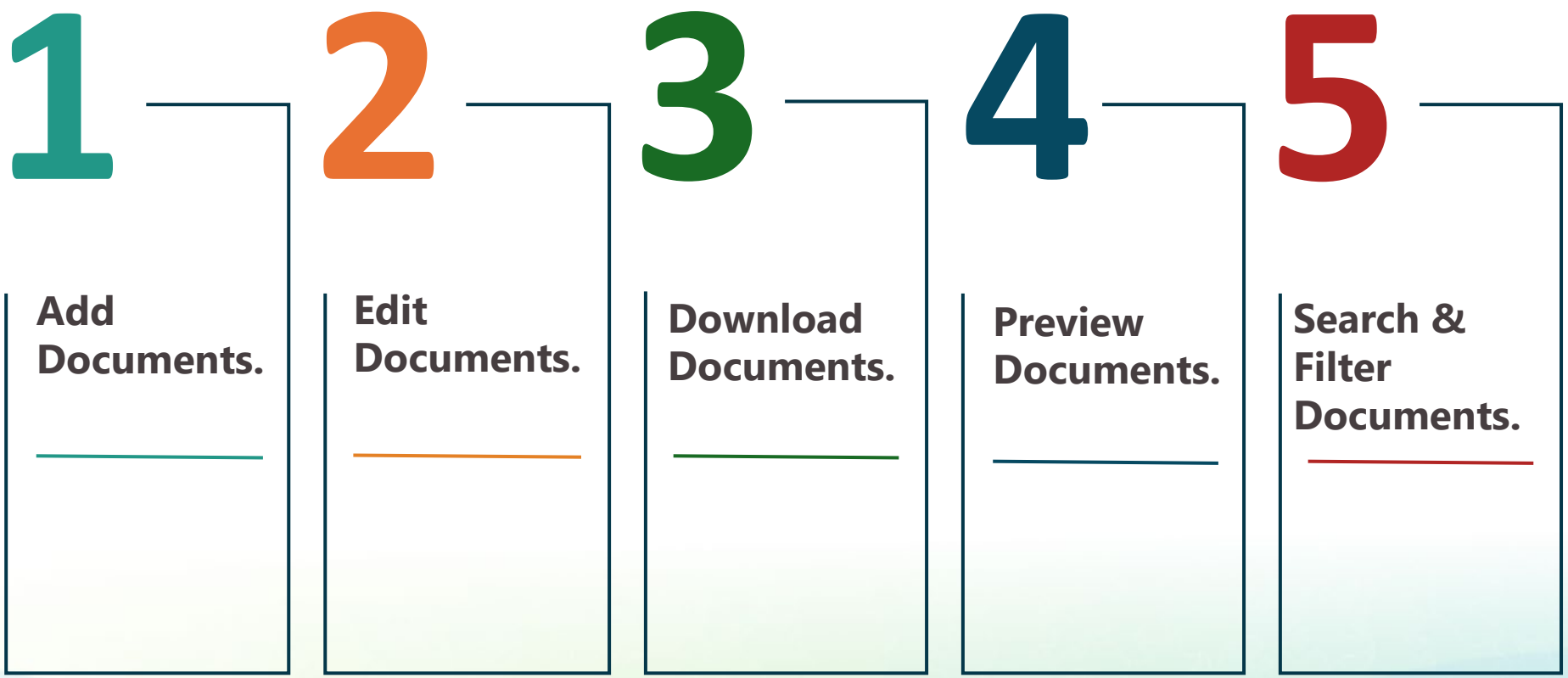
1. Expand the Employee row.
2. Click the three-dot menu and select **Manage Employee's Documents.**





*Or you can **View Profile As Admin**, scroll to the bottom of the employee's profile page, and click on **View All Documents** to get to the employee's **Documents** page*

Manage Documents – Functions



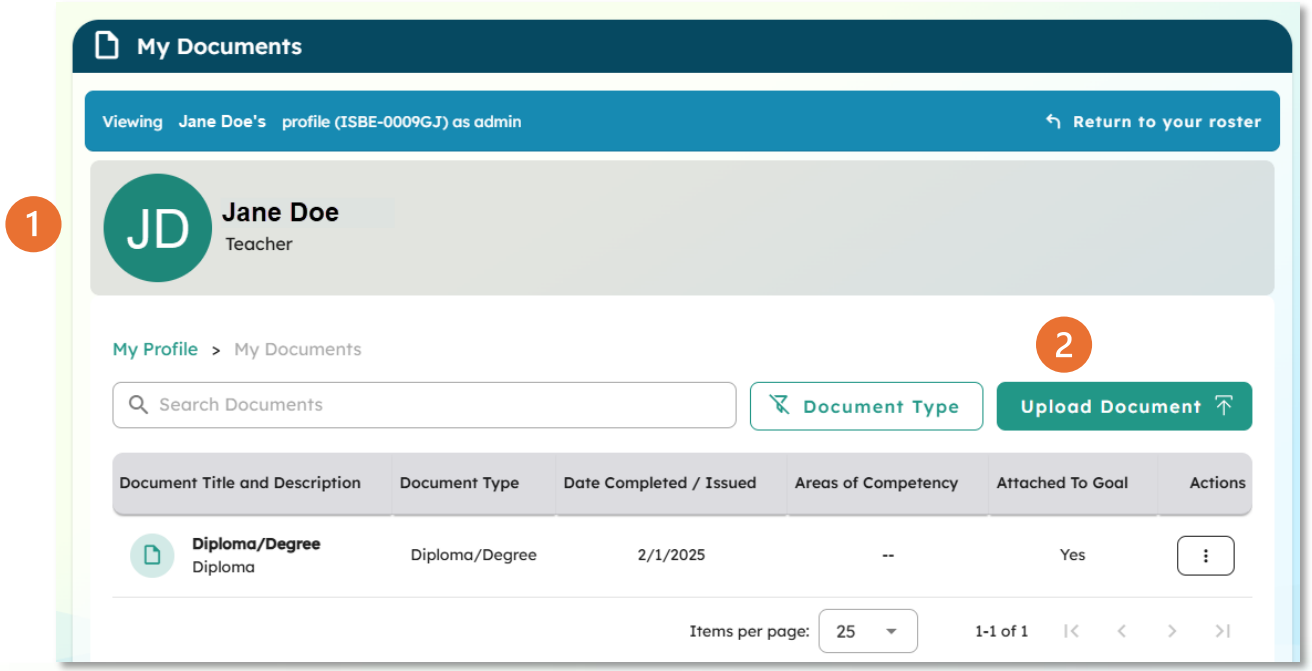
1 Add Documents

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Document Management** for your employee.

When you are viewing an Employee's profile and details, you will see a banner at the top of the page.

1. Make sure you have opened the correct employee.

2. Click **Upload Document.**



Add Documents – Add Details

1. Click inside the upload box and select the file you want to upload.

2. Choose the correct **Document Type.**

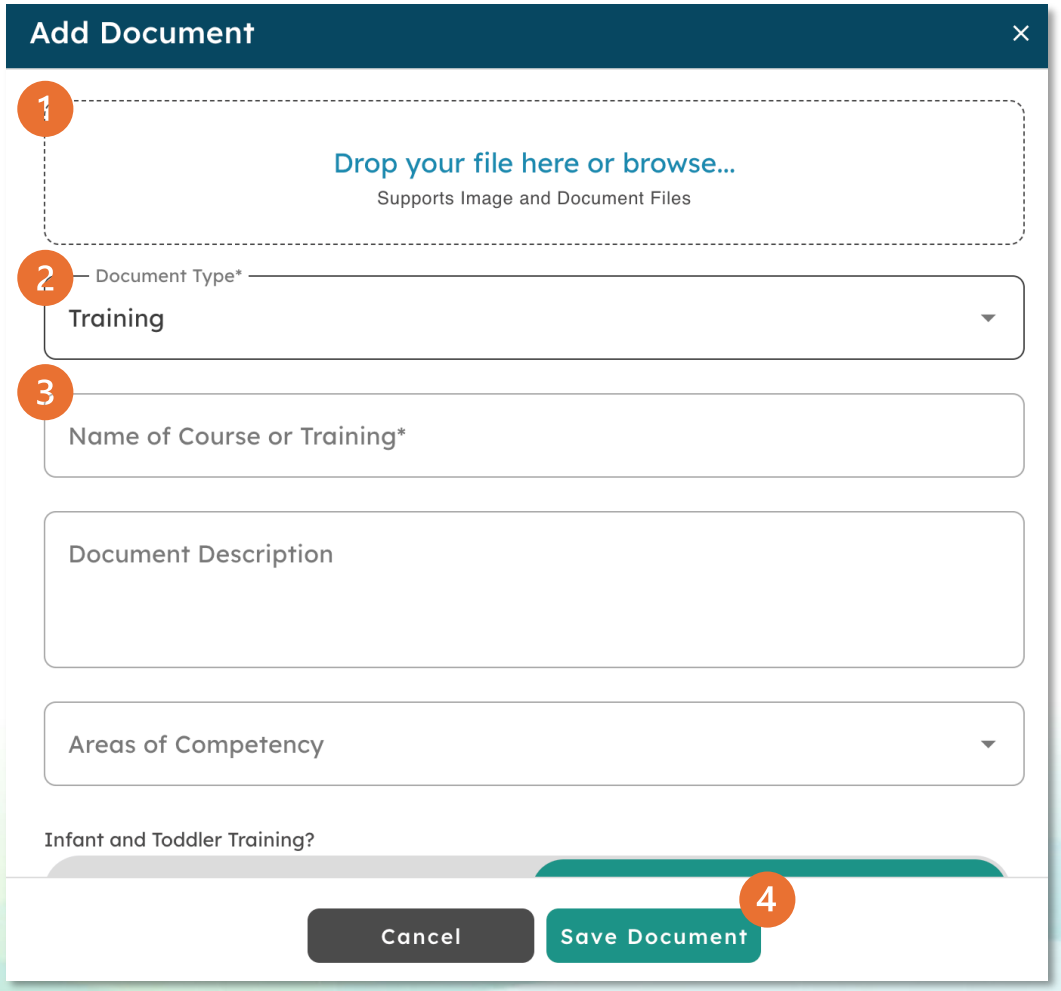
3. Fill in the Required Fields for that Document Type.

4. Click **Save Document.**

   File size must be less than 10 MB.

   Supported file types include:

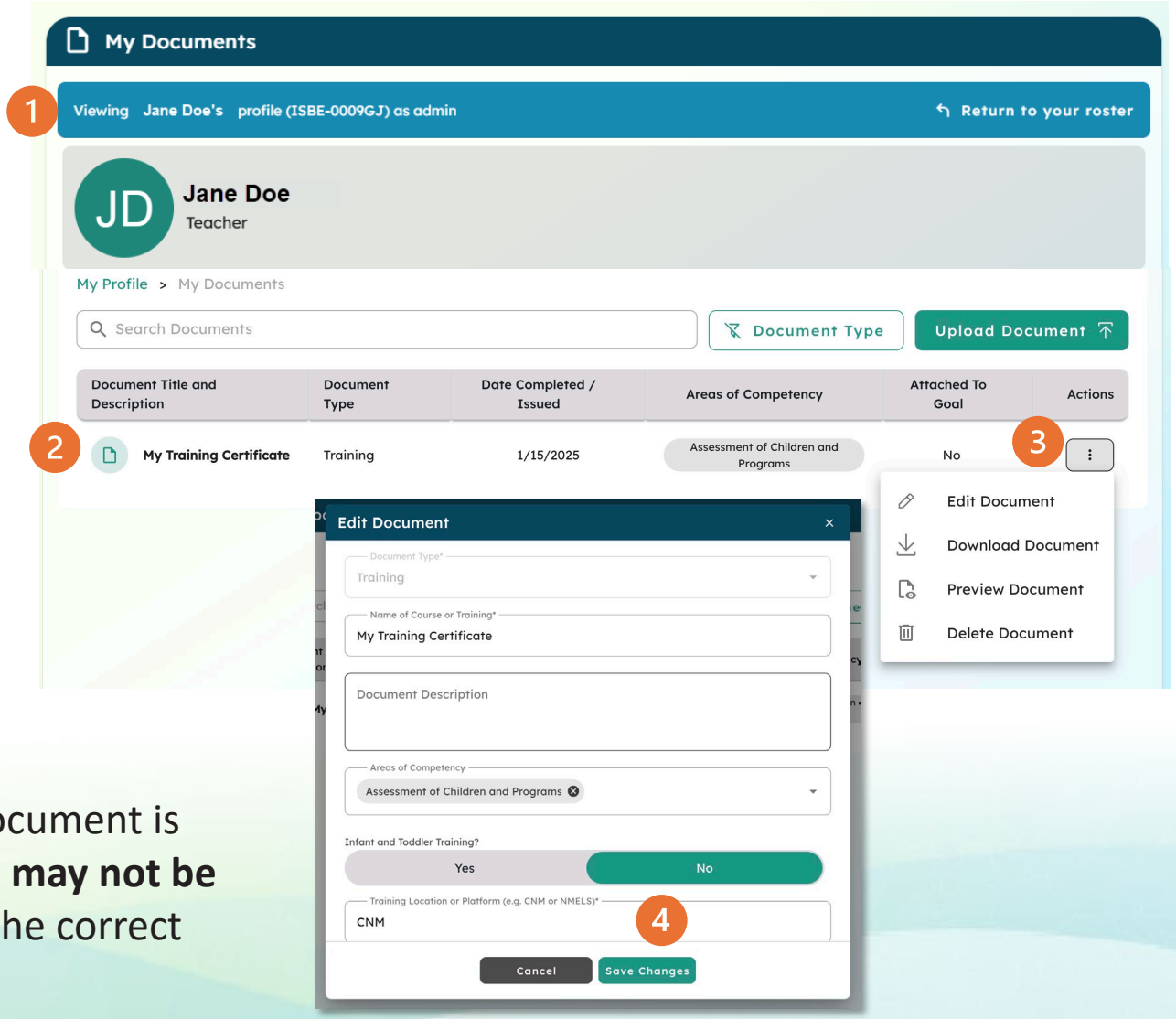
   - PDF
   - JPEG/JPG
   - PNG
   - GIF
   - HEIC
   - DOCX/DOC
   - PPTX/PPT
   - XLSX/XLS
   - CSV



2 Edit Documents

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Document Management** for your employee.

1. Make sure you have opened the correct employee.
2. Find the document you want to change.
3. Click the **three-dot menu** and select **Edit Document.**
4. In the **Edit Document** window, make changes and click **Save Changes.**



Document details may be edited before the document is attached to a goal. **Document Type and Image may not be edited.** Instead, create a new document with the correct type and/or image

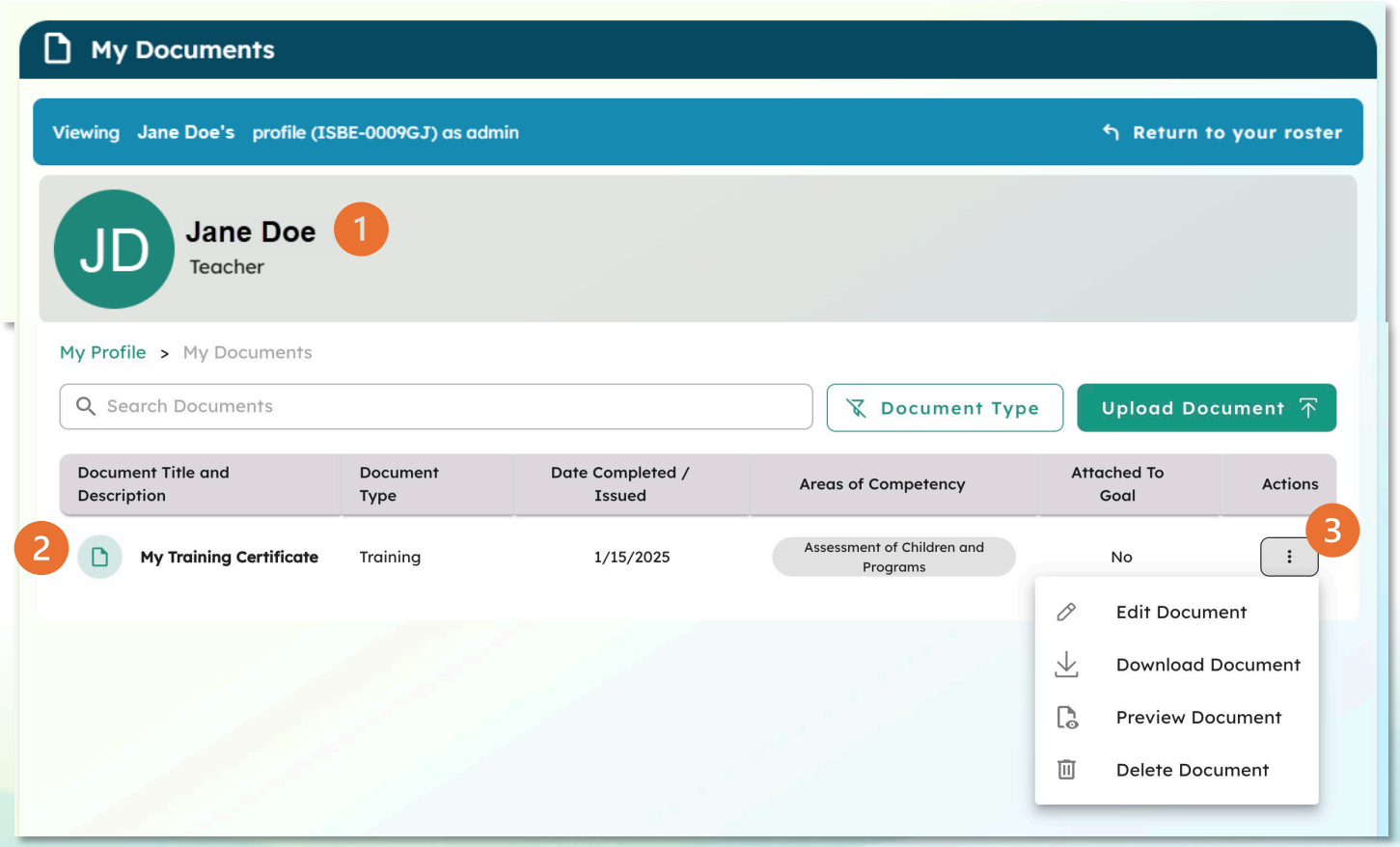
3 Download Documents

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Document Management** for your employee.

1. Make sure you have opened the correct employee.

2. Find the document you want to download.

3. Click the **three-dot menu** and select **Download Document**. The Document's image file will download to your device.

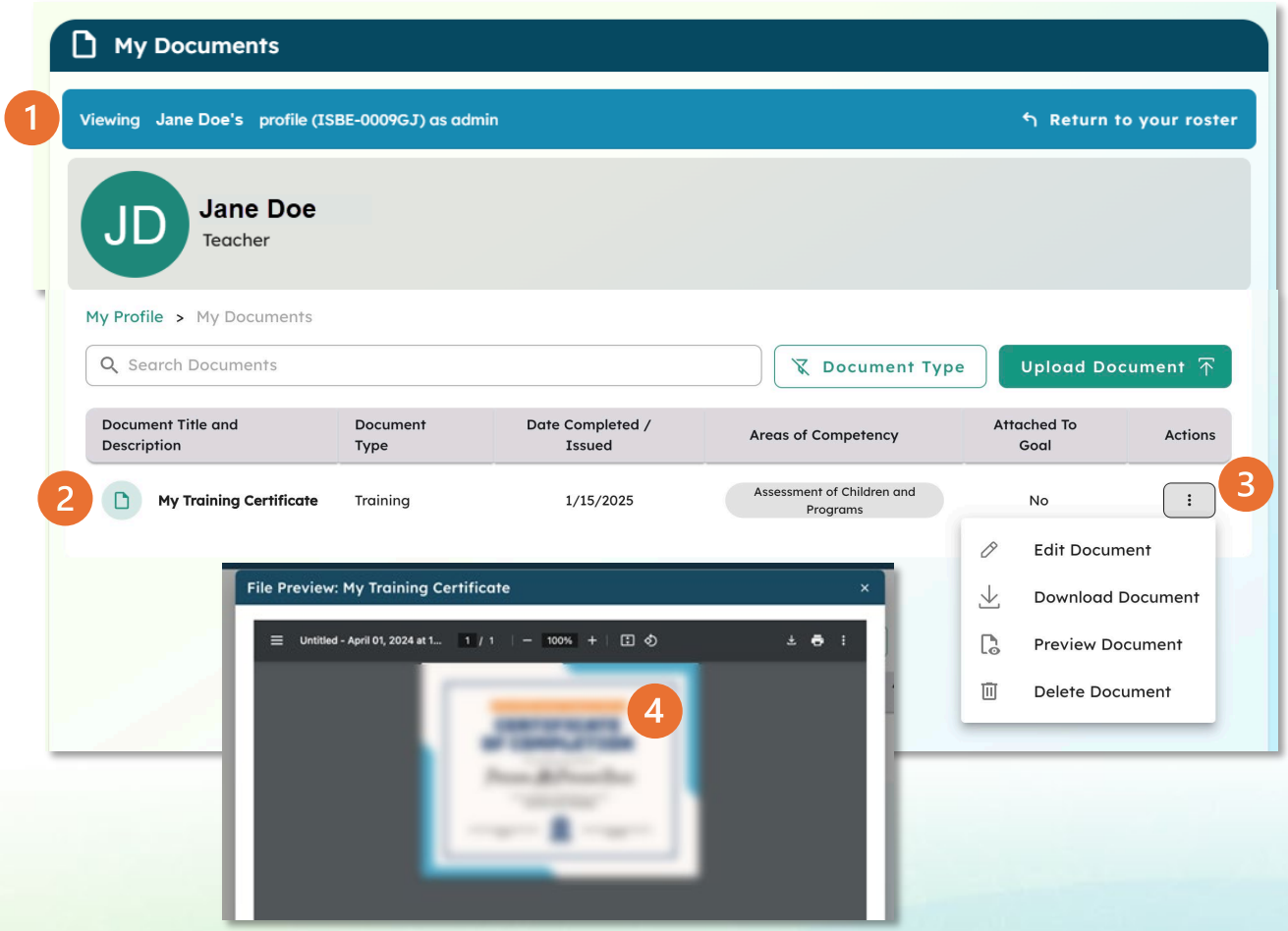


4 Preview Documents

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Document Management** for your employee.

1. Make sure you have opened the correct employee.
2. Find the document you want to preview.
3. Click the **three-dot menu** and select **Preview Document.**
4. If the file type supports Preview, the document will display in a pop-up window.

You may preview PDF and picture files (JPG, PNG, GIF, HEIC). Preview is not available for MS Office (DOC, PPT, XLS) or CSV documents.



Preview might be blocked by your browser settings

5 Search and Filter Documents

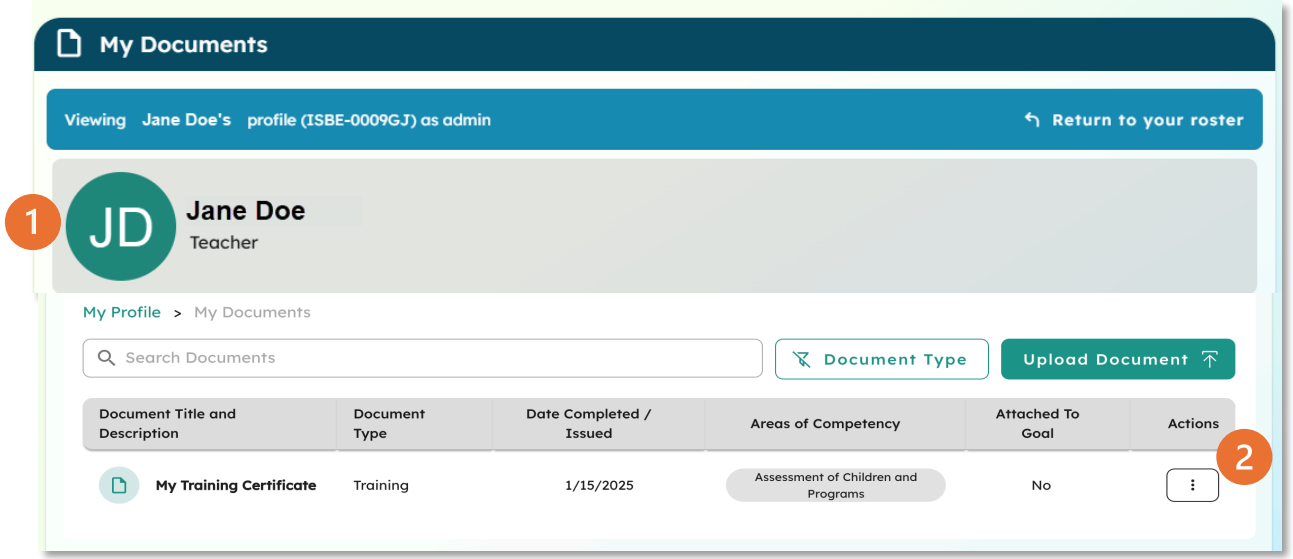
Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Document Management** for your employee.

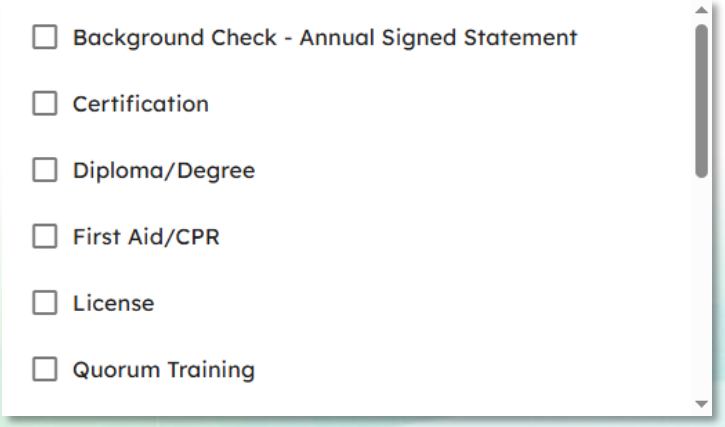
1. Make sure you have opened the correct employee.

2. Enter four (4) or more letters to in the **Search Documents box** to find matches based on:
   - Document Title and Description.
   - Area of Competency.

   OR

   Use the **Document Type** filter button to restrict the visible list by one or more document types.





Manage Documents – Other Features

A document will indicate who added it:

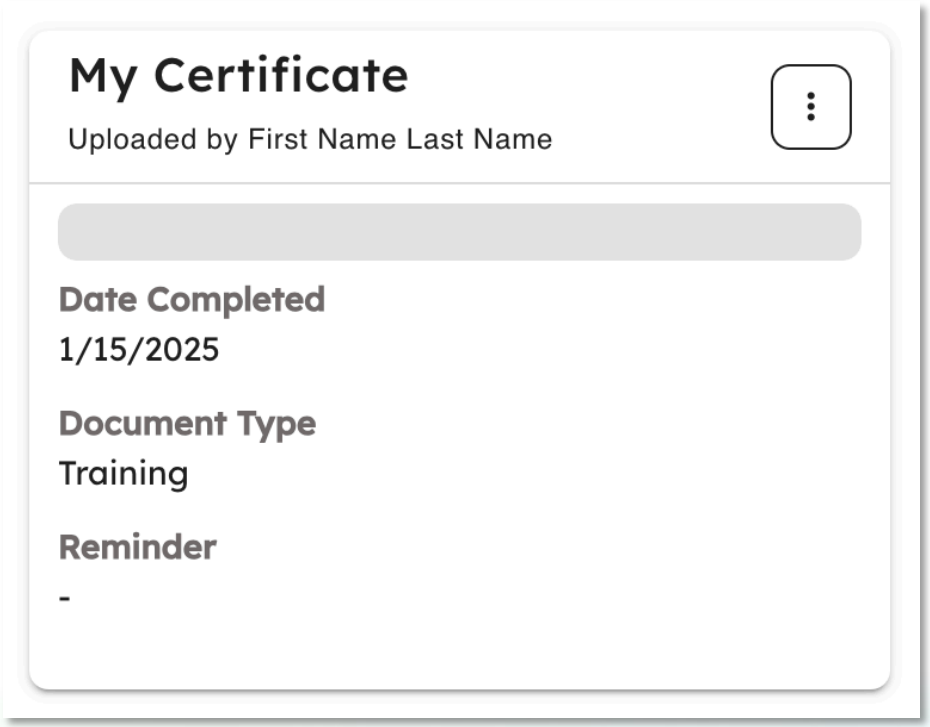
- You
- Another Agency Admin
- Your employee
- Quorum eLearning

Quorum eLearning Training

Some documents will be sent to from Quorum.

Your employee's PDIS Number will need to be entered into their Quorum eLearning profile on the Quorum website to connect the two systems and import their Quorum training documents.

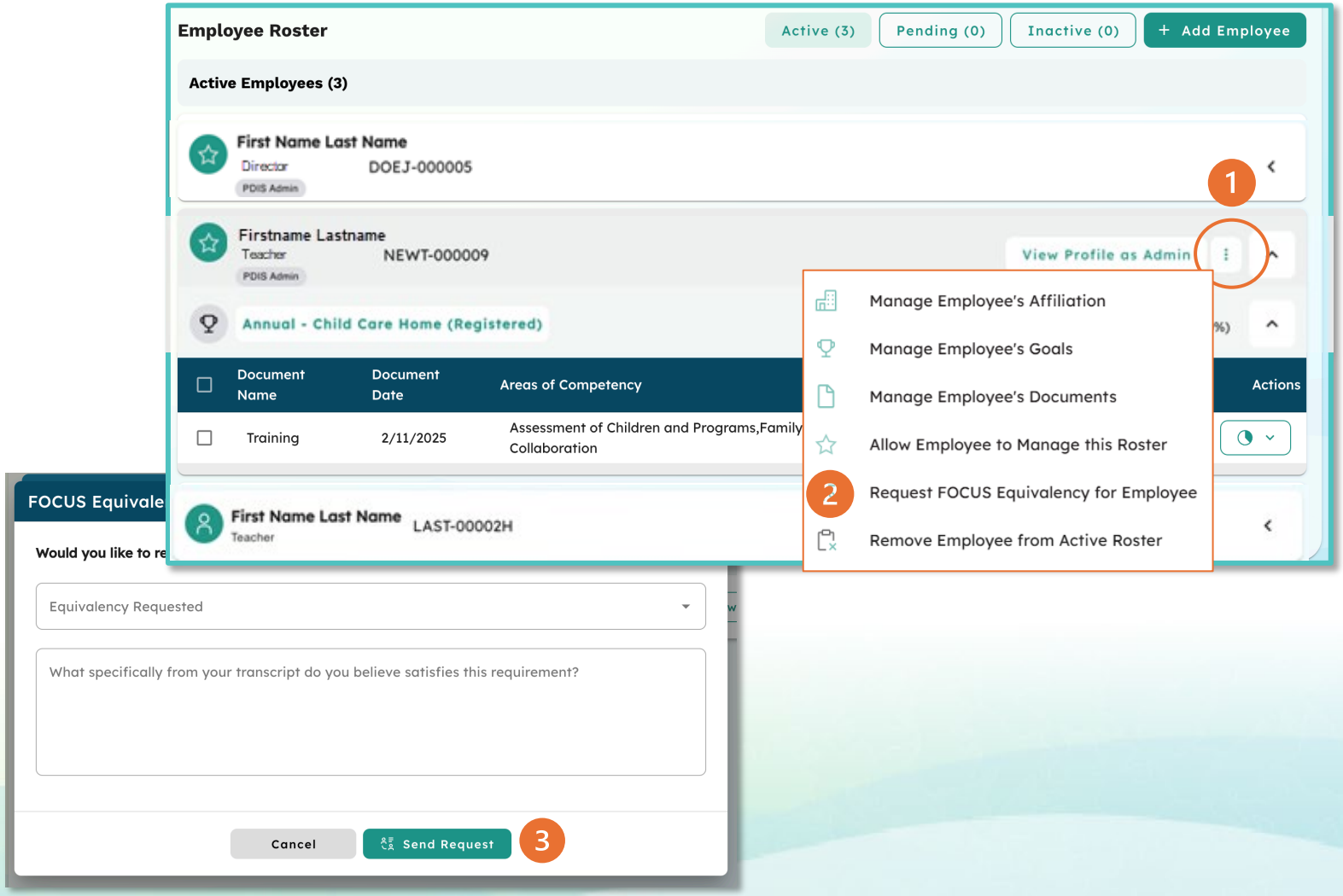
Completed training from Quorum will come over to PDIS automatically and cannot be further edited.



Requesting a FOCUS Equivalency Review

You may submit a FOCUS equivalency review request on behalf of your employee by following these steps:

1. From your **Agency Roster** click the **three-dot menu** for the individual that needs the FOCUS Equivalency review.
2. Click **Request FOCUS Equivalency for Employee.**
3. Complete the **FOCUS Equivalency Review Request** form and click **Send Request.**



Section 3 Frequently Asked Questions

Question: **I uploaded a document, but it does not appear. Why?**
Answer: Clicking the refresh button in your browser should fix this issue.

Question: **What file types can I upload?**
Answer: Files must be one of the following types: PDF, JPEG (JPG), PNG, GIF, DOCX (DOC), XLSX (XLS), PPTX (PPT), or CSV.

Question: **What is the maximum file size I can upload?**
Answer: Files cannot exceed 10 MB.

Question: **I can't edit or delete a certain document. Why?**
Answer: **You cannot edit** a document if it is attached to a goal and verified by your employer or ECECD. **You cannot edit** a document that is attached to a goal.

Question: **Why does preview not seem to be working?**
Answer: Only images (JPEG, JPG, PNG or GIF) and PDFs support previews. Previewing PDFs might be blocked by your browser settings.

Section 4 – Goal Management

Section 4 Table of Contents

- Objectives
- Key Terms
- Goals – Overview
- Manage Employee's Goals
- Goals – Add a New Goal
- Goals – Edit a Goal
- Inactivate/Reactivate a Goal
- Attach Proof of Training
- Verify Attached Documents
- Frequently Asked Questions
- Help and Support

Section 4 Objectives

By the end of this topic, users will…

- Manage an employee's goals, including:
  - Adding,
  - Editing,
  - Invalidating & Reactivating,
  - Attaching Proof of Training, and
  - Verifying Proof of Training.
- Understanding how to use attachment functions such as preview, download, edit, and remove to attach documents to goals.

Section 4 Key Terms

- Affiliation – A relationship where an early childhood professional is employed by an agency.
- Agency – An early childhood education or care employer.
- Agency Admin – An individual from your agency who can edit, approve and verify submissions:
  - Full Admin privileges allow management of all *editable fields* for an employee.
  - Limited Admin privileges allow management of *most* editable fields, excluding wage information.
- ECECD Admin – An ECECD employee who can edit, approve and verify submissions.
- Employee – An Early childhood professional.
- Goal – A planned training path, OR a credit or hour requirement for professional development.

Goals – Overview

A Professional Development Plan is made up of one or more professional development goals.

Set the required number of training hours to meet the goal.

Attach training certificates (or other documents) to the goal and enter the associated training hours.

Your employer may verify attachments for accuracy in preparation for ECECD site visit verification.

ECECD verifies proof of training separately. Only ECECD verifications officially count toward program compliance.

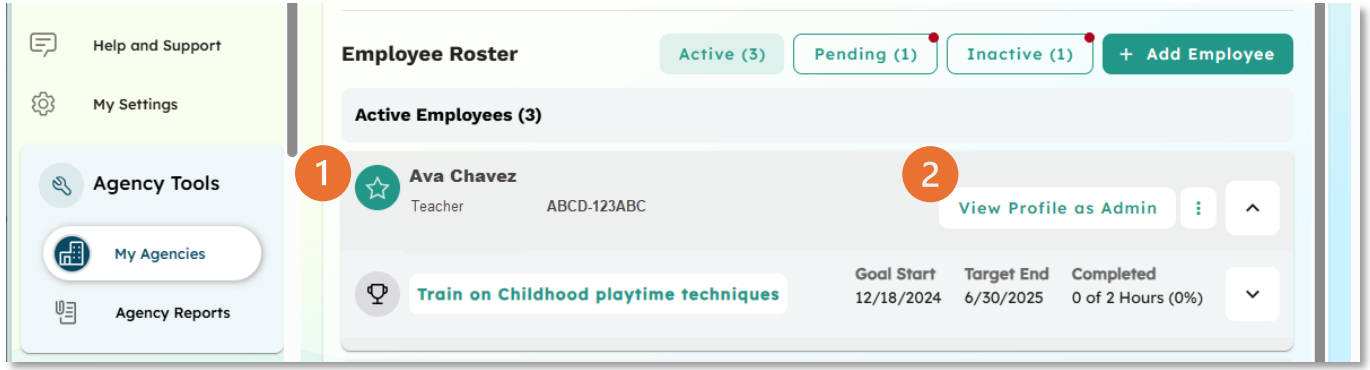
When % Complete meets or exceeds 100%, the professional development goal has been met.

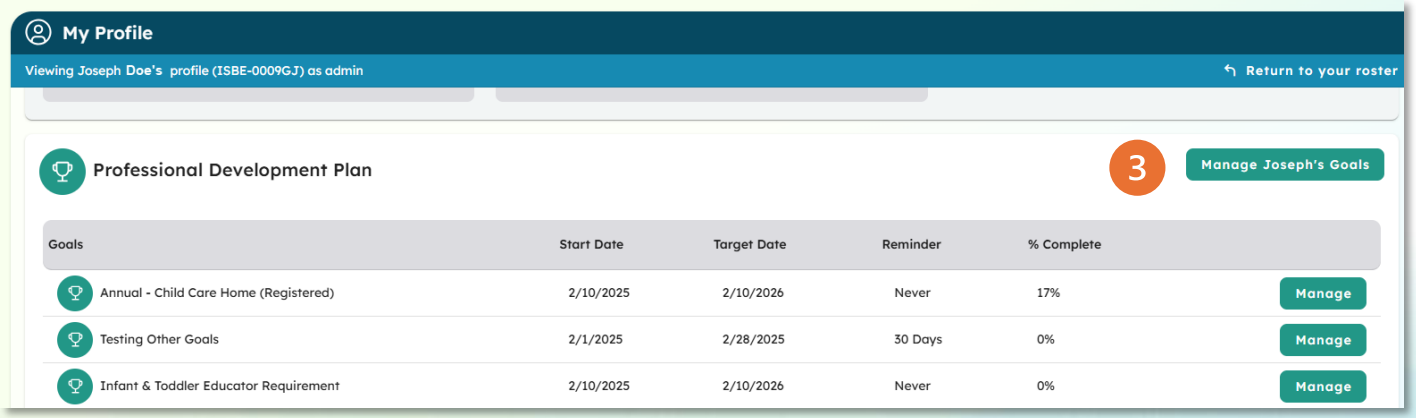
If the total hours in attached documents exceed the total hours for the goal, % Complete will exceed 100%.

Manage Employee Goals – Navigation

From **My Agencies** | **View Roster** screen:

1. Select the correct employee.
2. Click **View Profile as Admin.**
3. In the **Professional Development Plan** section of the employee's profile page, Click **Manage (Employee's) Goals.**





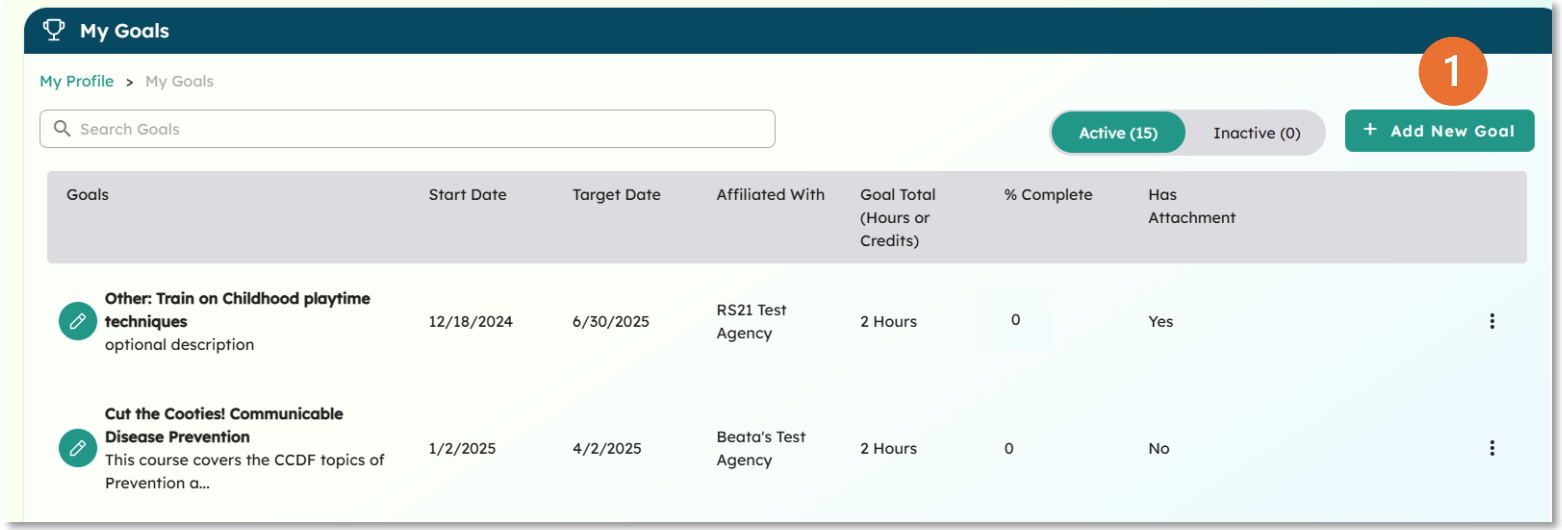
Manage Goals – Functions

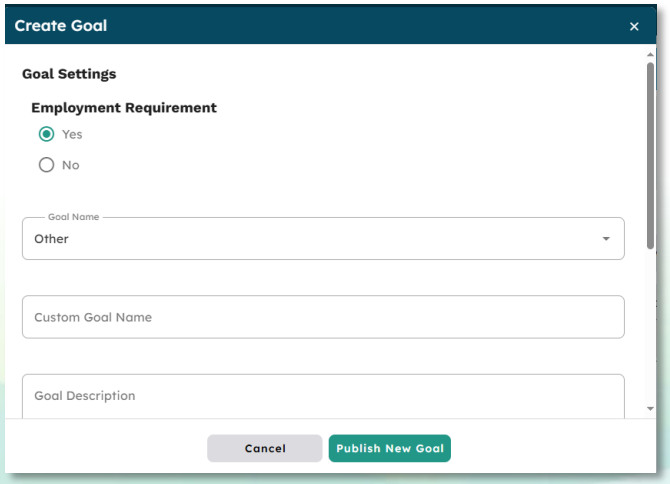
1 Add a New Goal

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

From the **My Goals** screen:

1. Click **Add New Goal** to open the **Create Goal** window.





Employment Requirement should be Yes *unless you are creating a personal goal that is not linked to any Agency employer.*

Add a New Goal – Add Details

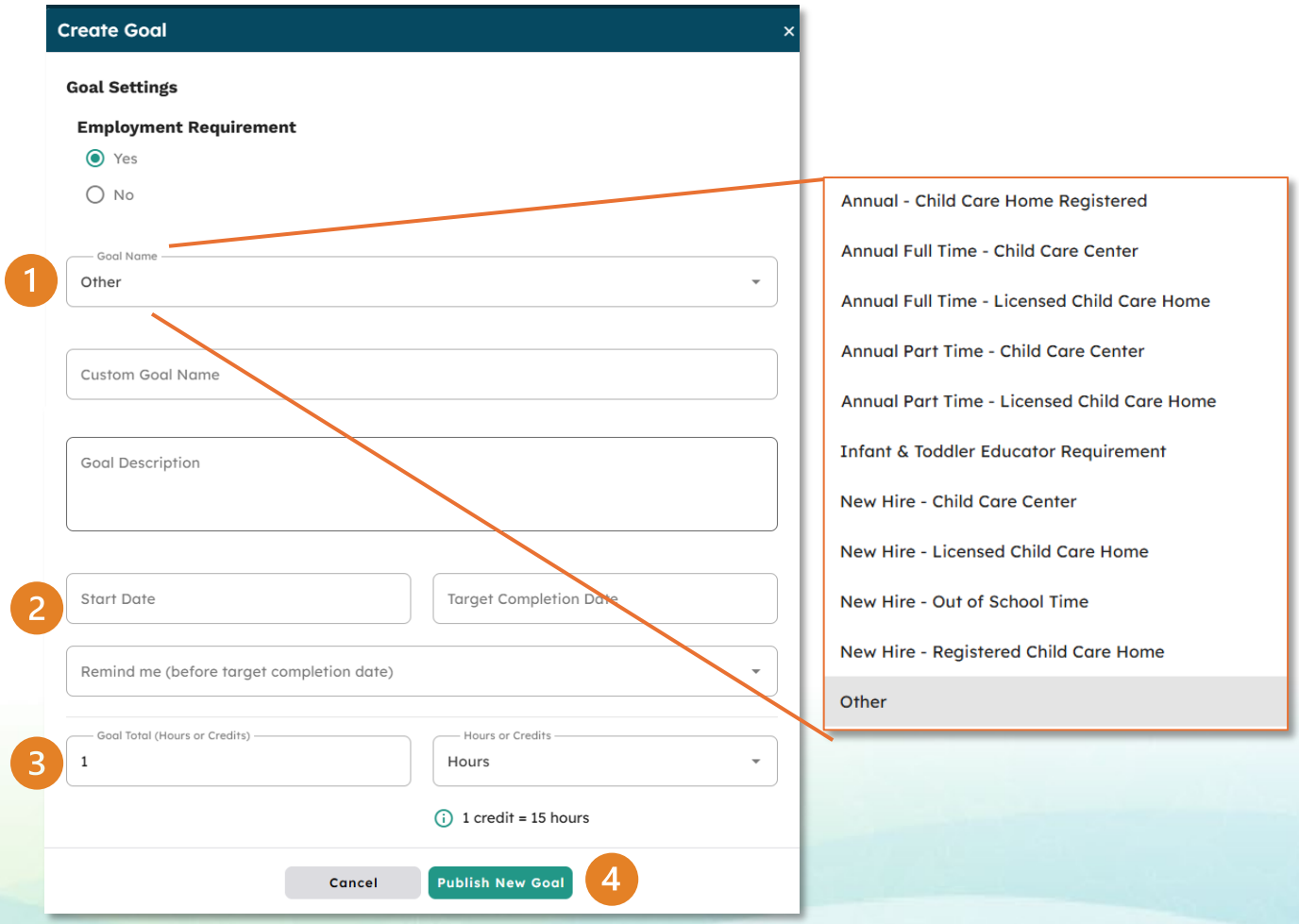
1. Select the correct **Goal Name** from the list of options.

   Other is selected by Default. Enter the professional development custom name and description, or select from one of the options from the prepopulated goals list.

2. Enter the **Start Date** and **Target Completion Date.**

3. Enter the number of training hours or course credits you expect this goal will require (this can be edited later if needed).

4. Click **Publish New Goal.**



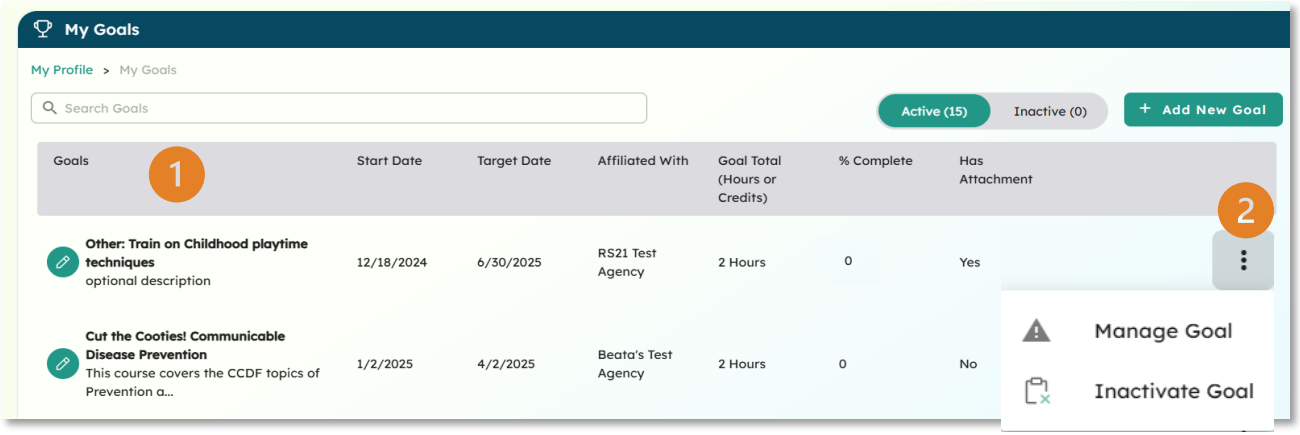
2 Edit a Goal

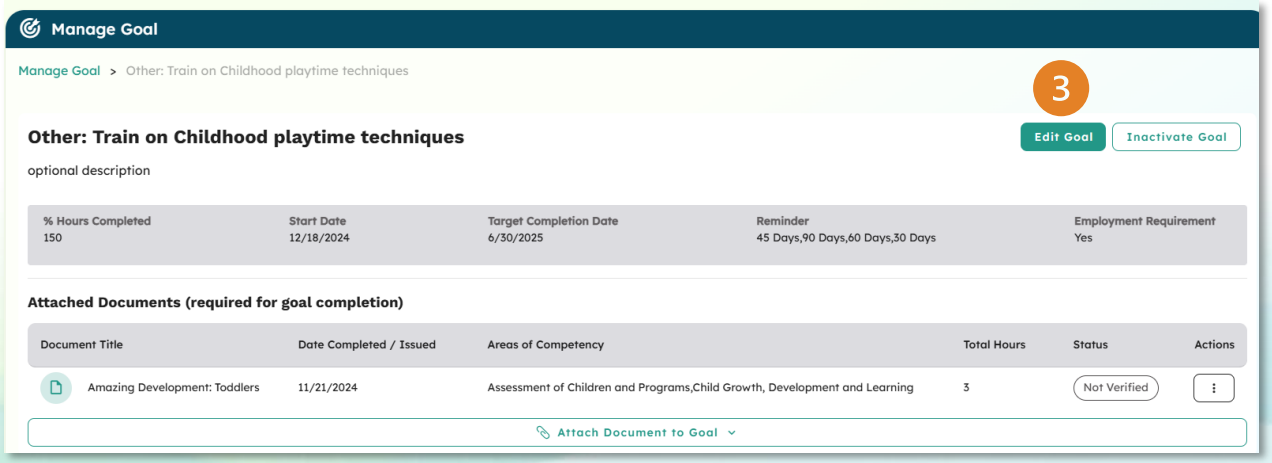
*The **Edit Goal** button will not display if one or more attached documents have been verified. **Verified status** means the goal may no longer be edited.*

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

From the **My Goals** screen:

1. Find the goal you wish to edit.
2. Click on the three-dot menu and select **Manage Goal.**
3. Click **Edit Goal.**





Prepopulated & Custom Goals

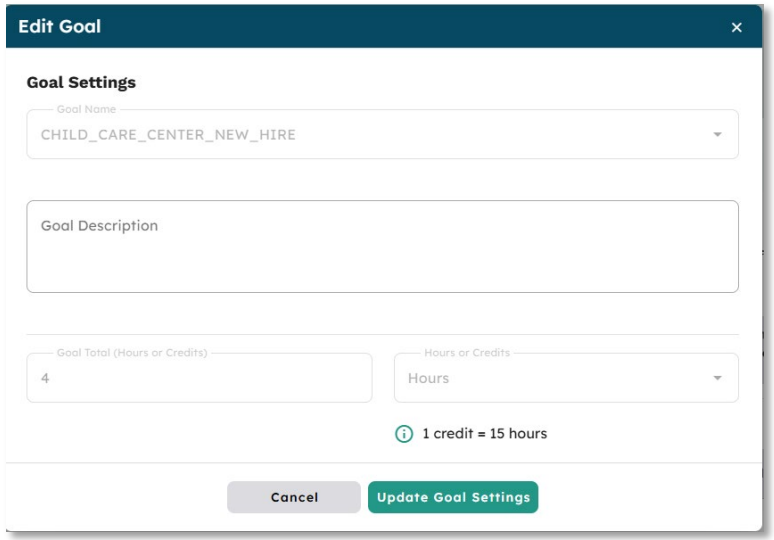
A. If the goal was added from the list of **Prepopulated Goals**, you can not edit this goal.

B. If the goal was added as a **Custom Goal (Other)**, you can edit:
   - Custom Goal Name.
   - Goal Description.
   - Start Date.
   - Target Completion Date.
   - Remind Me.
   - Goal Total.

1. Update the desired fields.

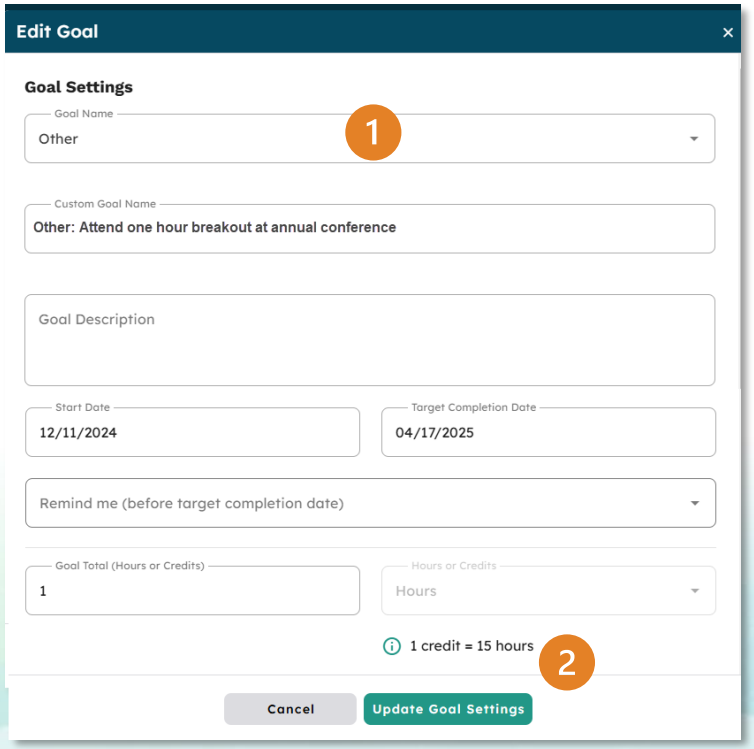
2. Click **Upload Goal Settings.**

A



Goal Total cannot be switched between Hours and Credits once created.

B

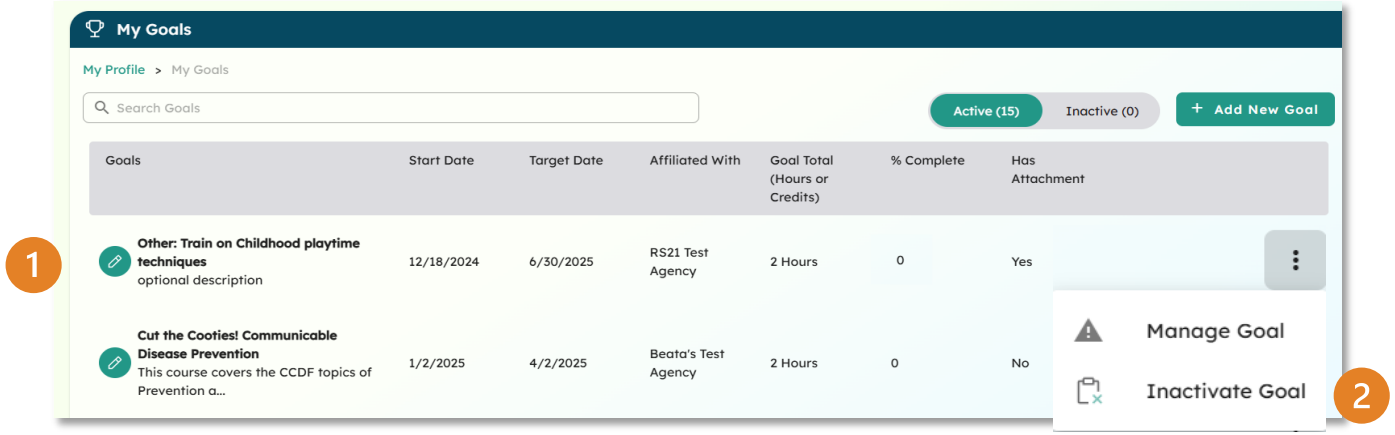


3 Inactivate / Reactivate Goal

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

From the **My Goals** screen:

1. Find the goal you wish to inactivate.
2. Click the three-dot menu and select **Inactivate Goal**. If you accidentally Inactivate a goal, you may also **Reactivate** it here.



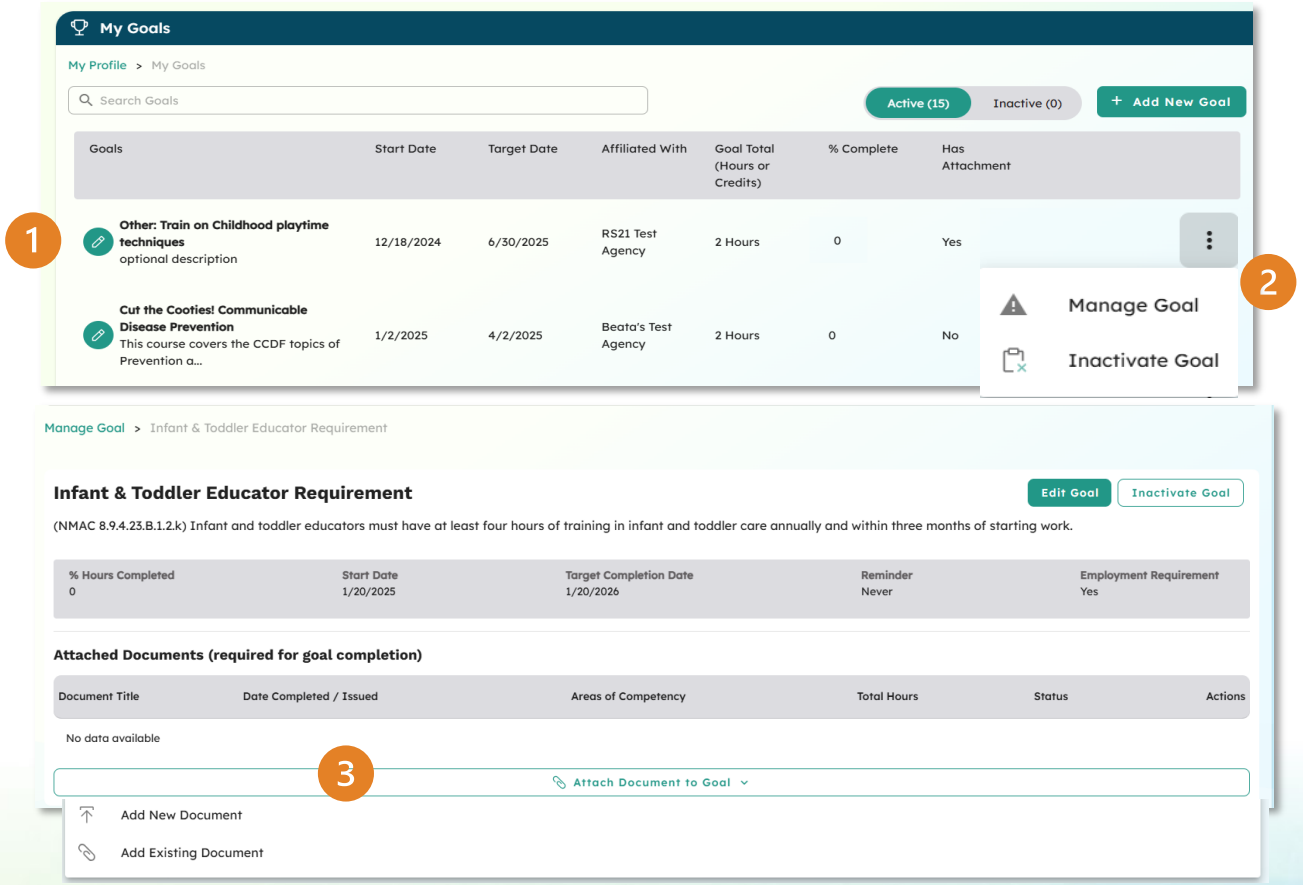
A goal cannot be deleted. *Goals entered in error may be marked* ***Inactive.***

4 Attach Proof of Training

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

From the **My Goals** screen:

1. Find the goal you wish to manage.
2. Click on the three-dot menu and select **Manage Goal** to open the Manage goal page.
3. Click **Attach Document to Goal**. You may **Add a New Document** or **Add Existing Document.**



One or more documents must be attached to a goal to prove a goal has been met. These will be verified by ECECD.

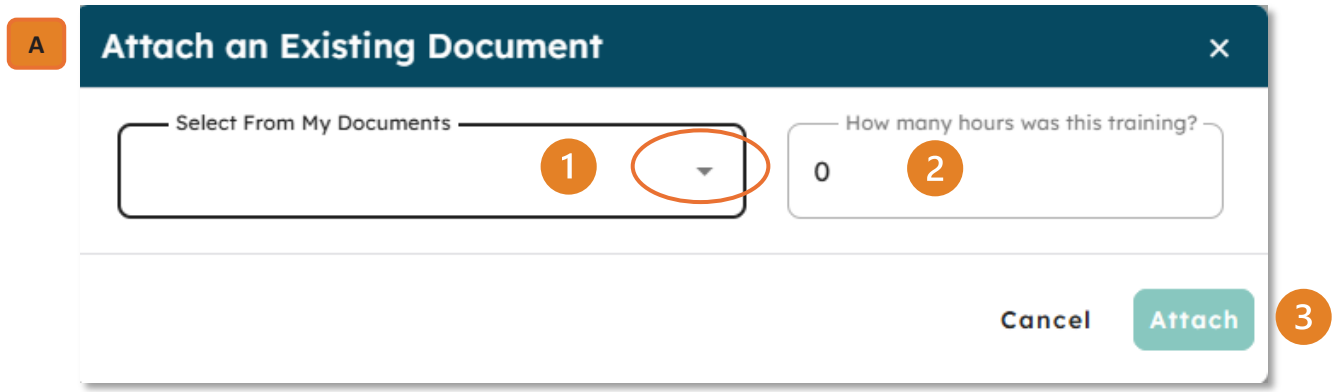
Attach Proof of Training – Add Existing Document

A. If a proof of training document has already been uploaded to your employee's profile, choose **Add Existing Document.**

   1. Click on the **arrow** to see the list of your documents and then select the one you want to attach to this goal.

   2. Enter in the number of training hours this documented proof represents.

   3. Click **Attach.**

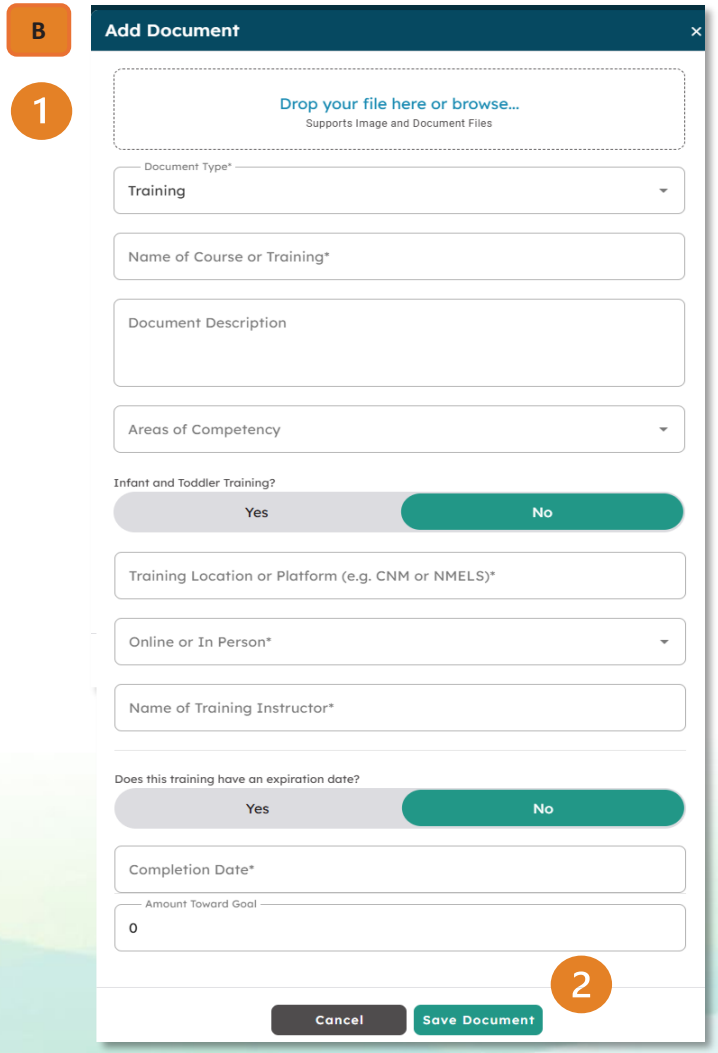


Once a document is attached to a goal it may no longer be deleted.

Attach Proof of Training – Add New Document

B. If you are adding a new document as proof of training, choose **Add New Document.**

1. Similar to adding a new document:
   - Add the **File.**
   - Select **Document Type.**
   - Complete required fields *(changes based on Document Type selected).*
   - Enter the **Amount of Hours Toward Goal** this document represents.
2. Click **Save Document.**

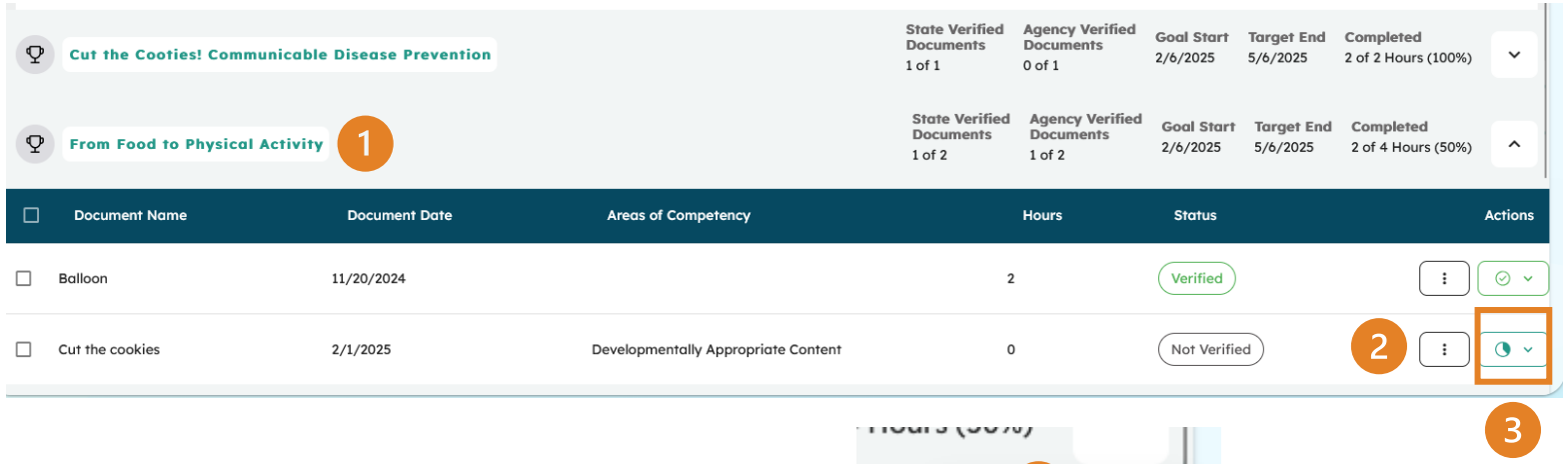


Adding a new document here will also add it to your ***My Documents*****.**

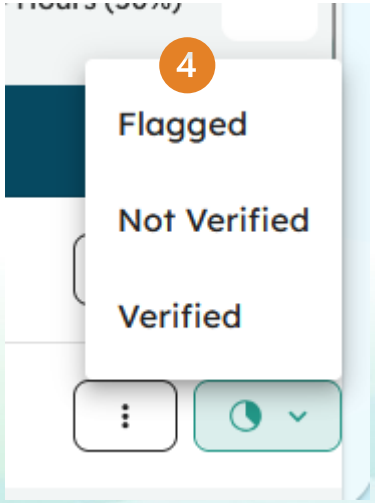
5 Verify Proof of Training (Optional)

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access the employee's list goals.

1. Find the goal you wish to manage and **expand the view of the goal.**
2. Find the document you wish to verify and use the **three-dot menu** to preview the document.
3. Next, click on the **pie-chart icon**.
4. Select **Verified** if the document provides proof of training, **Not Verified** if it does not, or **Flagged** if more information is needed.



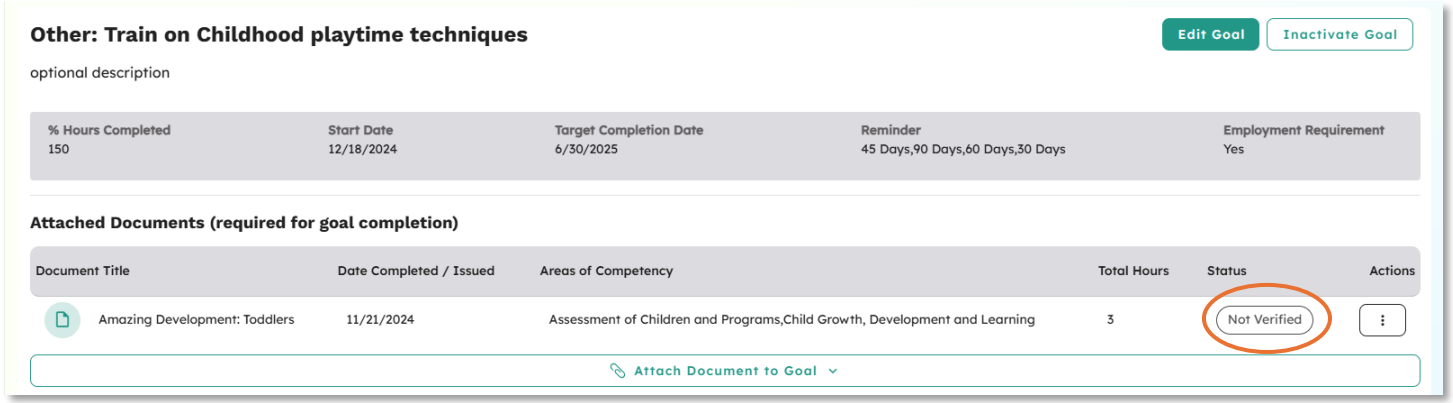
One or more documents must be attached to a goal to prove a goal has been met. These will be verified by ECECD.



Levels of Verification

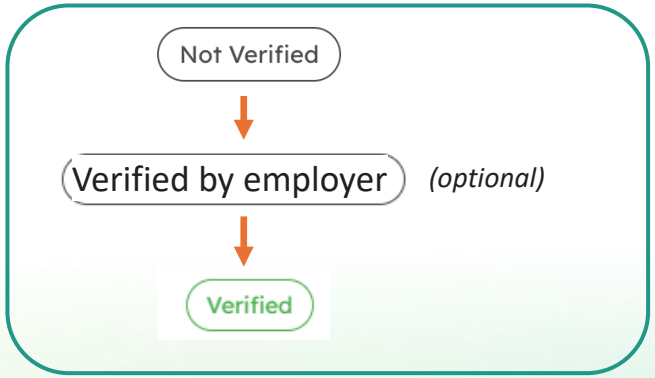
ECECD Staff will verify that the attached document as proof of training is accurate.

Agency Admin has an option to verify attached documents, but it is the ECECD verification that completes this process.



Employer verification of a document attachment is optional.

Only ECECD can verify that a document attached to a professional development goal confirms goal completion and program requirements.



Once a document is **Verified** it may no longer be edited or deleted.

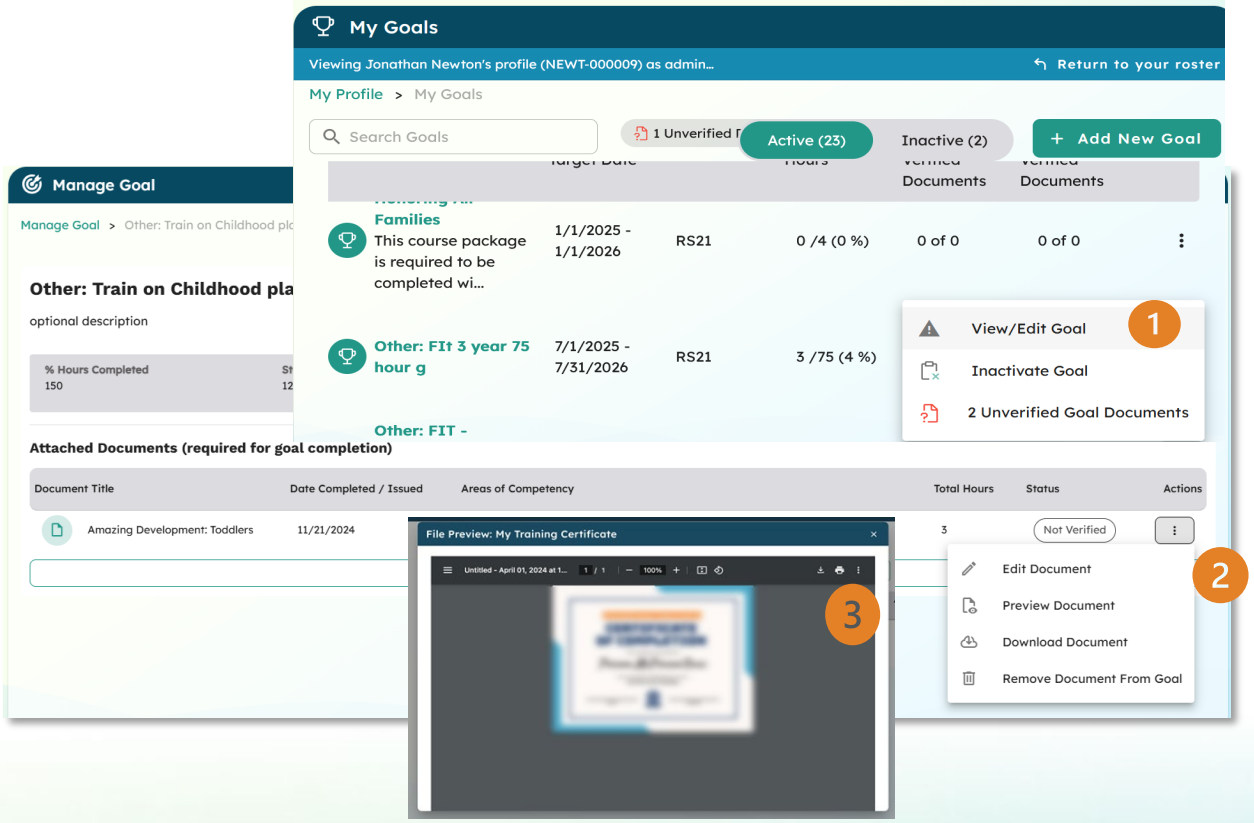
Manage Attached Documents – Functions

1. Preview Attached Documents.
2. Download Attached Documents.
3. Edit Attached Documents.
4. Remove Attached Documents.

1 Preview Attached Documents

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

1. Identify the goal for which you wish to review the attachments. Click **View/Edit Goal** in the **three-dot menu.**
2. Find the document you want to preview in the **Attached Documents** section. Click the three-dot menu for the document and select **Preview Document.**
3. Click "X" to close the preview window.



Preview might be blocked by your browser settings.

You may preview PDF and picture files (JPG, PNG, GIF, HEIC). Preview is not available for MS Office (DOC, PPT, XLS) or CSV documents.

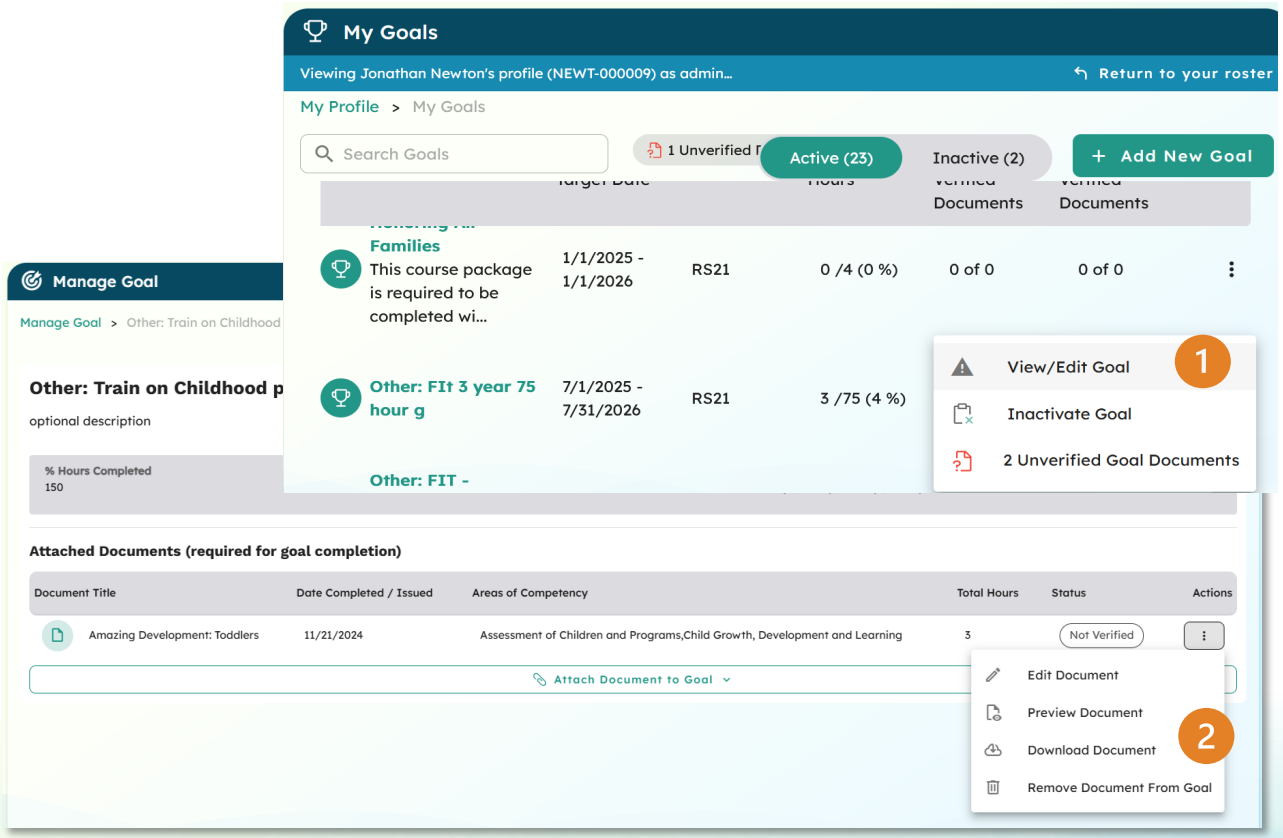
2 Download Attached Documents

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

1. Identify the goal for which you wish to review the attachments. Click **View/Edit Goal** in the **three-dot menu.**

2. Find the document you want to preview. in the **Attached Documents** section. Click the **three-dot menu** for the document and select **Download Document.**

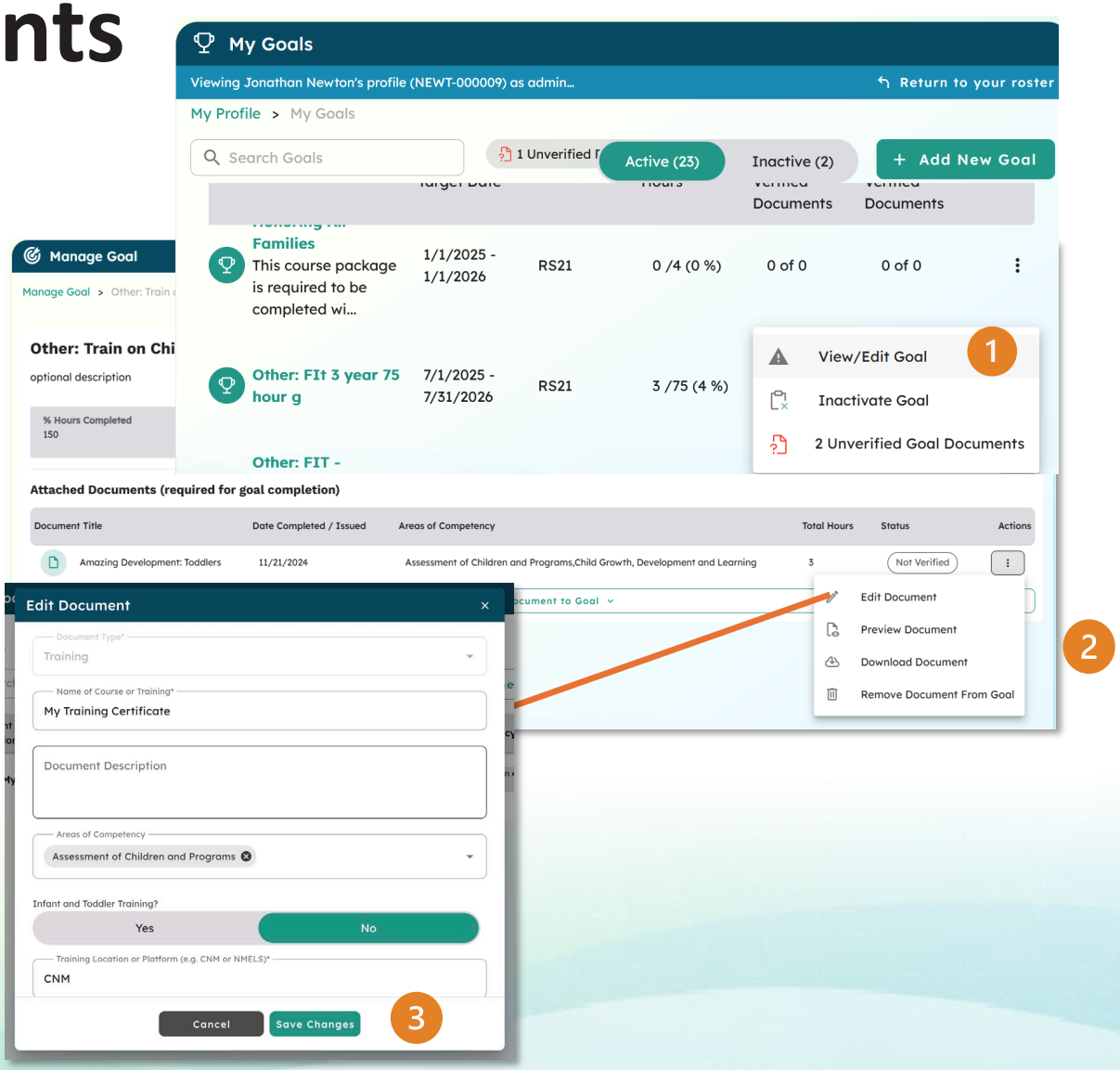
   The Document's image file will download to your device (typically in the downloads folder).



3 Edit Attached Documents

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

1. Identify the goal for which you wish to review the attachments. Click **View/Edit Goal** in the **three-dot menu.**
2. Click the **three-dot menu** for the document and select **Edit Document.**
3. In the **Edit Document** window, make changes and click **Save Changes.**



Documents uploaded by Quorum may not be edited.

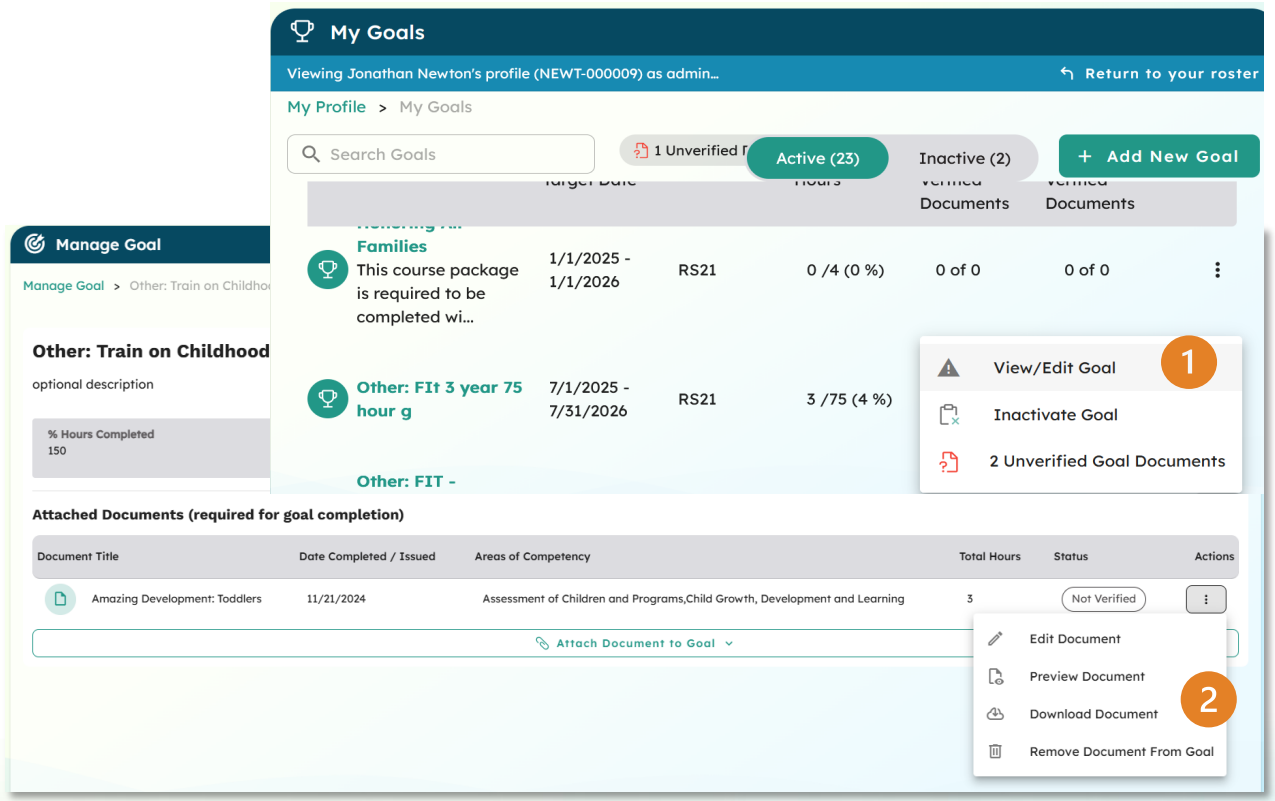
Documents **Verified** by your employer or by ECECD may no longer be edited.

4 Remove Attached Documents

Sometimes a document attachment may be wrong. In that case, the document will need to be replaced. To replace a document on a goal:

Starting on the **My Agencies | View Roster** page, use the **Active, Expanded View** to access **Manage Employee's Goals** for your employee.

1. Identify the goal for which you wish to review the attachments. Click **View/Edit Goal** in the **three-dot menu.**
2. Click the three-dot menu for the document and select **Remove Document from Goal.**



Documents **Verified** by your employer or by ECECD may no longer be edited or removed.

Section 4 Frequently Asked Questions

Question: How do you delete a goal?
Answer: Goals cannot be deleted. If a goal was created in error, it may be marked Inactive.

Question: Should you mark a professional development goal as Inactive once it is complete?
Goals typically should remain active through the employee's professional development plan window (12 months or more).

Question: A 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, % Complete will exceed 100%.

Question: If someone switches employers, do their professional development goals in progress follow them?
No. Goals attached to an Agency (employer) are marked inactive when the employee disaffiliates 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.

Section 5 – Settings, Reports, & Resource HUB

Section 5 Table of Contents

- Objectives
- Key Terms
- Navigating the Additional Features
- My Settings
- My Reports
- Resource HUB
- Frequently Asked Questions
- Help and Support

Section 5 Objectives

By the end of this topic, users will…

- Know how to change your display language.
- Be aware of the ability to turn off – or on – your email notifications.
- Be able to download Goal reports.
- Know where to access additional resources in the Resource HUB.
- Access the Help and Support Page in the PDIS Application.

Section 5 Key Terms

- .csv file – A file type that holds spreadsheet-style information; can be accessed in Microsoft Excel.
- Agency – An early childhood education or care employer.
- Agency Admin – An individual from an agency who can edit, approve and verify submissions.
- ECECD Admin – An ECECD employee who can edit, approve and verify submissions.
- Employee – An early childhood professional.
- Equivalency Review – An assessment using ECECD's FOCUS system to determine an early childhood program's star-rating.
- FOCUS TQRIS – (Tiered Quality and Achievement Rating and Improvement System) A system created and administered by the University of New Mexico used to assess the quality and achievement of early childhood programs.
- Free Text Entry – A field that allows a user to enter any text (numbers, letters, or special characters).

Navigating the Additional Features

1

My Settings.

- Set your **language** preference.
- Set your **email notification** preference.

2

My Reports.

- Pull information from the application.

3

Resource HUB.

- External resources.
- **Scholarship and Pay Incentive program.**
- Request **FOCUS** equivalency.

4

Help and Support.

- Contact ECECD.

1 My Settings

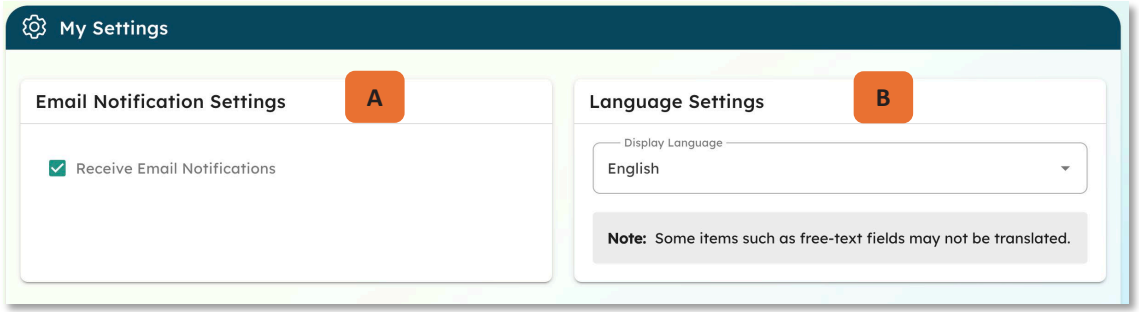
My Settings is a place where you can change a couple of options for PDIS Application functionality.

A. Email Notification Settings:

- To receive email notifications about changes to your PDIS account: check box is checked.
- If you **do not** want to receive email notifications about changes to your PDIS account, uncheck the box. (You will need to sign in to PDIS to see your notifications.)

B. Language Settings:

- If you want PDIS to appear in English, choose 'English' from the dropdown.
- If you want PDIS to appear in Spanish, choose Spanish from the dropdown.



About Language Settings:

You will immediately see changes on this and all pages when you change your Display Language.

Regardless of your language preference:
Free text (such as a document name or description) entered by any user will appear **exactly as it was entered** by that user and is **not further translated. Free text includes document name and description.**

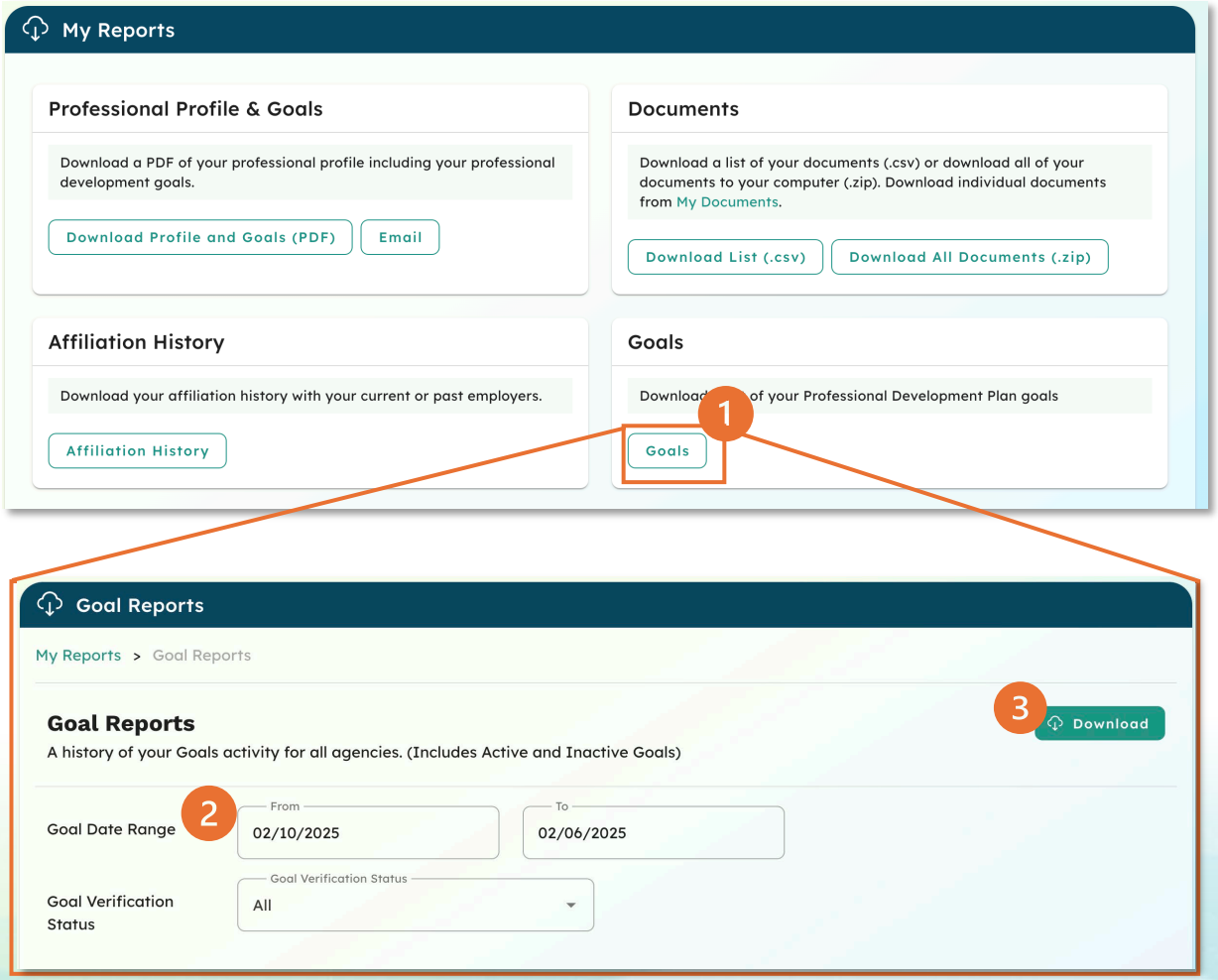
2 My Reports

In Agency Reports, you can download available goal reports and document lists, roster and affiliation reports, and more.

To download a report:
Select a Report Type.

- Click the button of the report you want to run.

1. **Select Report Options.**
   - Complete the fields or accept the default values.
2. **Download the Report (.csv).**
   - Click **Download.**
   - A **.csv file** will download to your device.

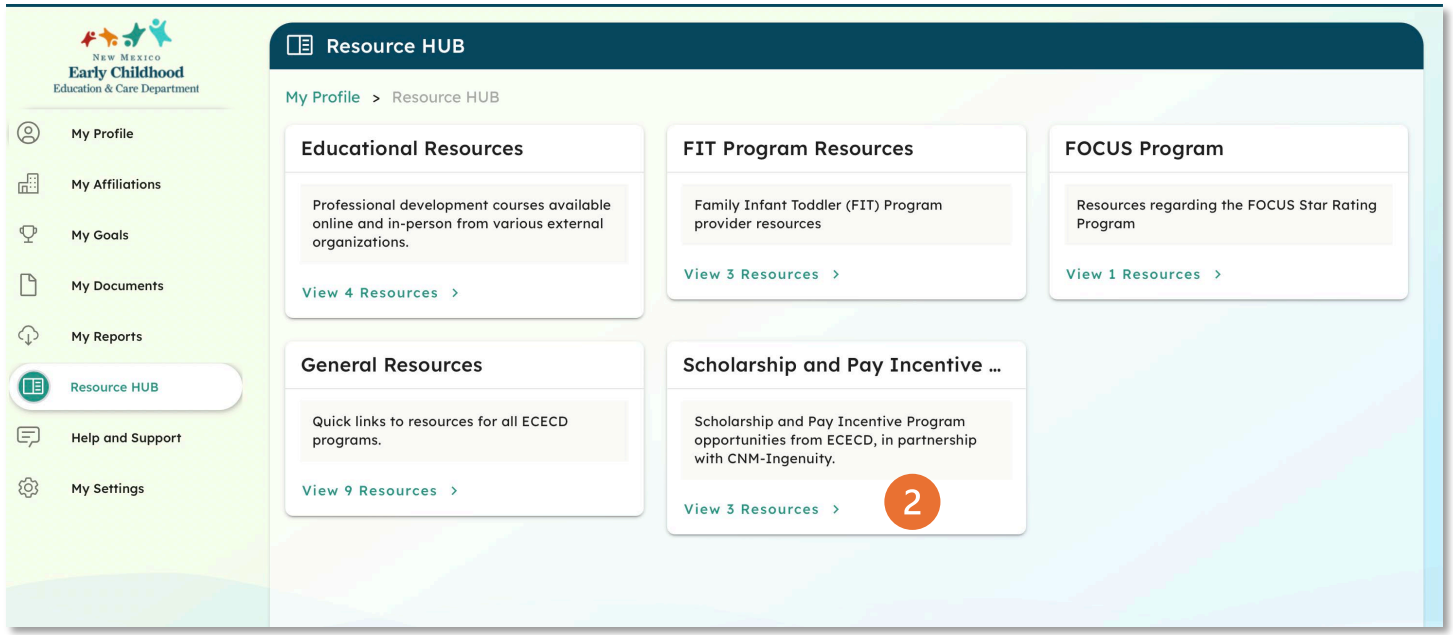


3 Resource HUB

The **Resource HUB** is your gateway to community and national resources, including sources online learning, 3rd party applications, scholarship and pay incentive programs, ECECD's FOCUS Program, and more!

1. Click **Resource HUB.**
   Resources are grouped into categories.

2. Click **View Resources** at the bottom of a category card to view the resources in that category.

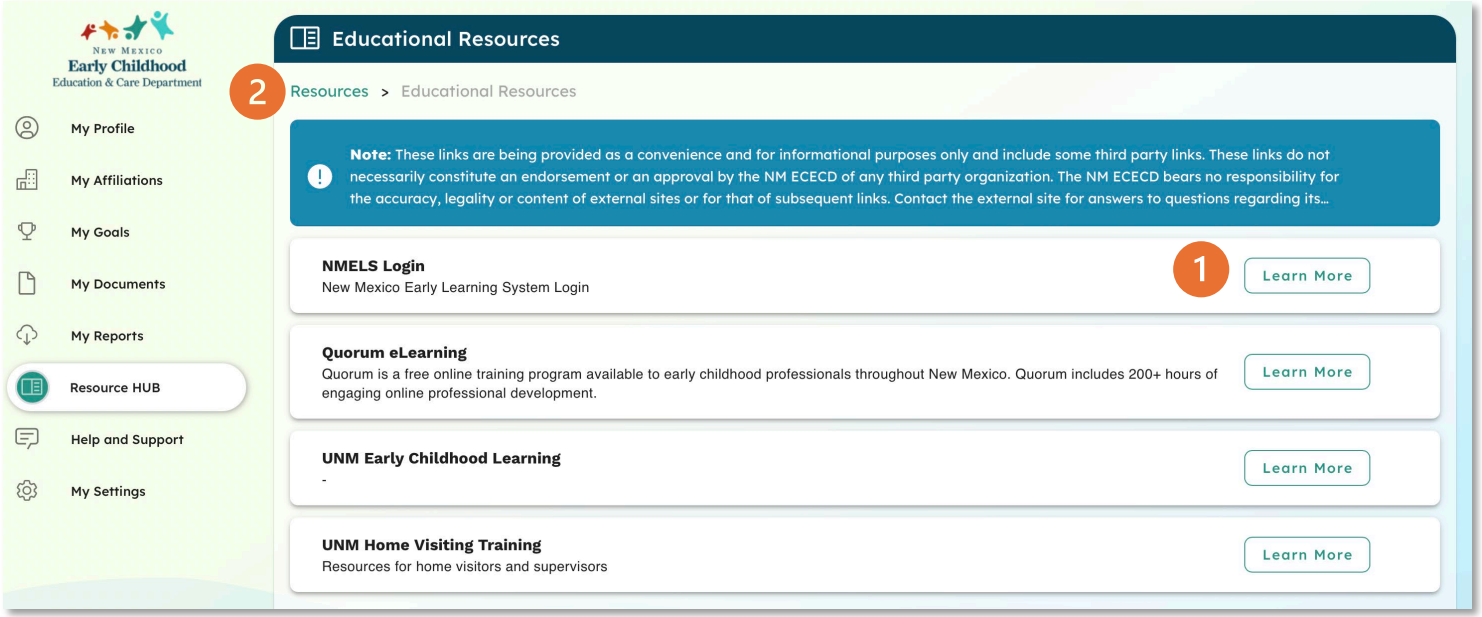


Resource HUB – Learn More

All links are external to PDIS.

1. Click **Learn More** to open a new browser tab displaying the resource's URL.

2. Go back to **Resource Categories** by clicking **Resources** at the top.



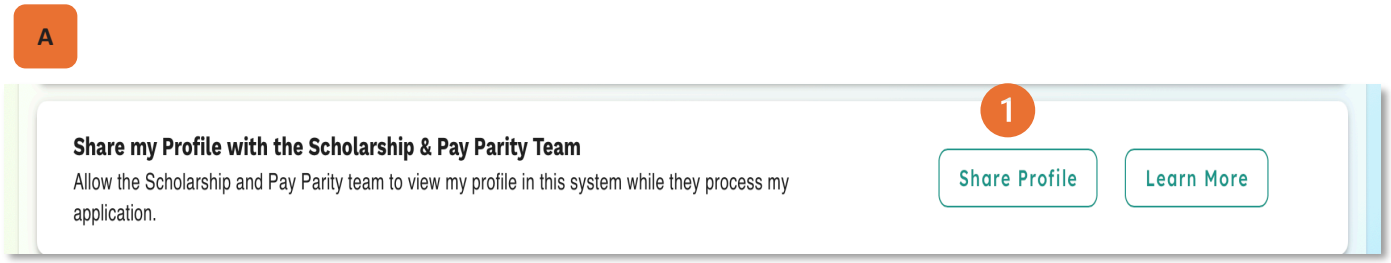
The **Resource HUB** is always growing. Check back and explore!

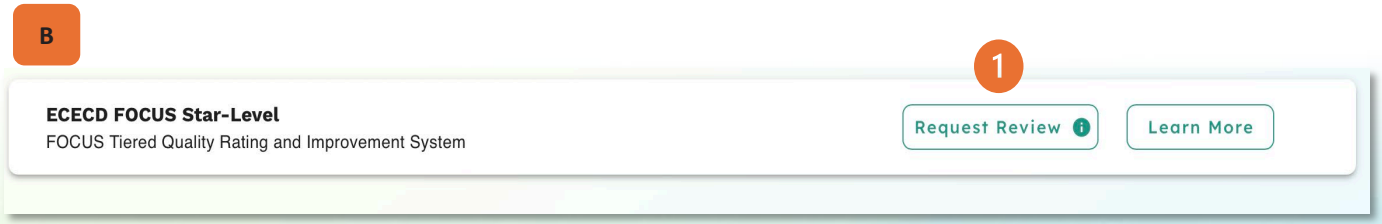
Resource HUB - Special Buttons

All resources have a **Learn More** button. Some resource have an extra button with special features:

A. In the **Scholarship and Pay Incentive Program resource**, there is an option to **Share my Profile with the Scholarship & Pay Parity Team**.
   1. Click **Share Profile.**
      You can also unshare your profile by clicking **Unshare Profile** (this option only appears after you have clicked Share Profile).

B. In the **FOCUS Program resource,** you can request an **ECECD FOCUS Star-Level review** from the FOCUS TQRIS team. You can submit one equivalency review for each equivalency category.
   1. Click **Request Review**.





4 Help and Support

Help and Support is for PDIS users that have questions or require technical support for PDIS.

A. Browse Helpful Resources:

- This is a reminder that you can visit the Resource HUB to find specific help topics.

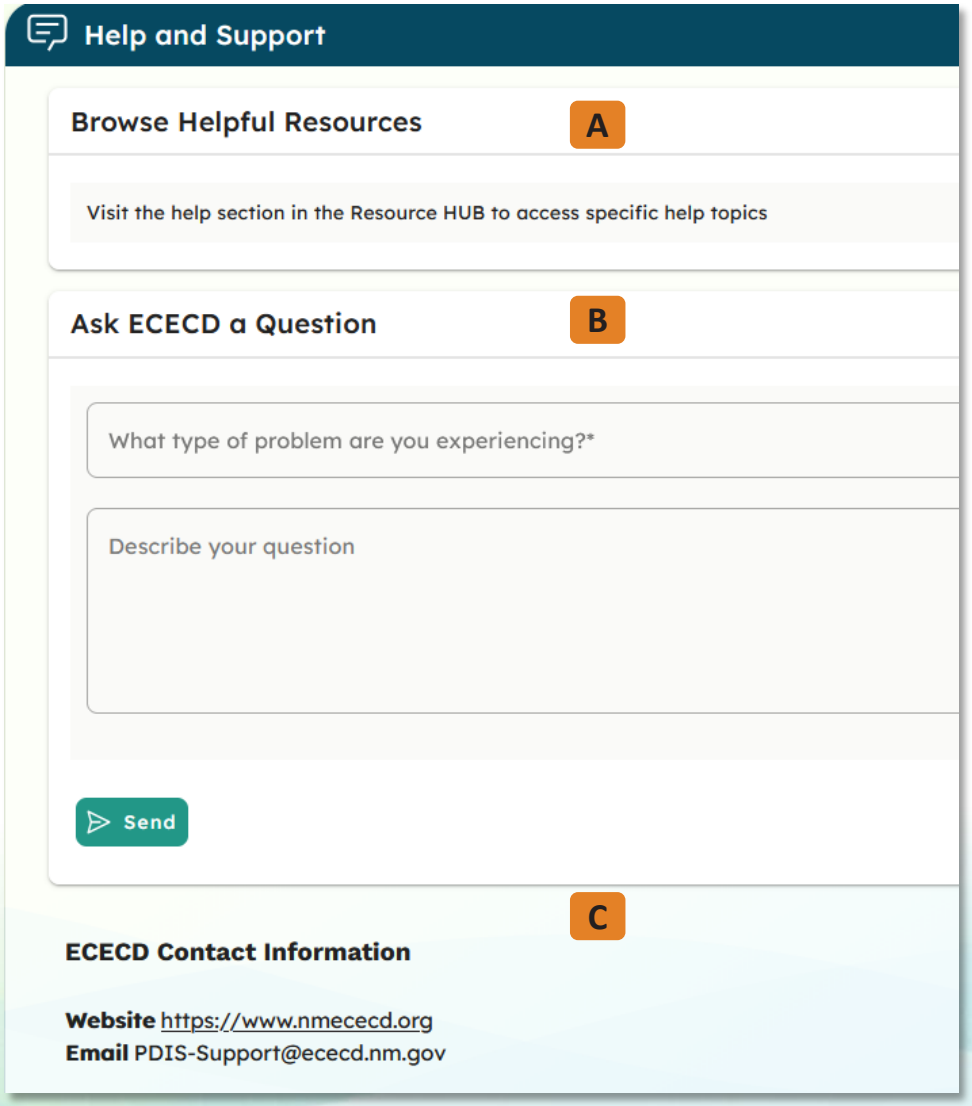
B. Ask ECECD:

To contact ECECD with questions about PDIS:

- Select a help topic from the dropdown and in the next box, describe your question.
- Click **Send.**

C. ECECD Contact Information:

- The ECECD website link and support email address are included here for quick reference.



Section 5 Frequently Asked Questions

Question: I found an issue with a resource. How do I report the issue?
Answer: Please report your finding by clicking **Help and Support** in the main menu and filling out the **Ask ECECD** form.

Question: Can I request a resource be added to the Resource HUB?
Answer: Yes! Please submit your request by clicking **Help and Support** in the main menu and filling out the **Ask ECECD** form.

Section 6 – FAQ

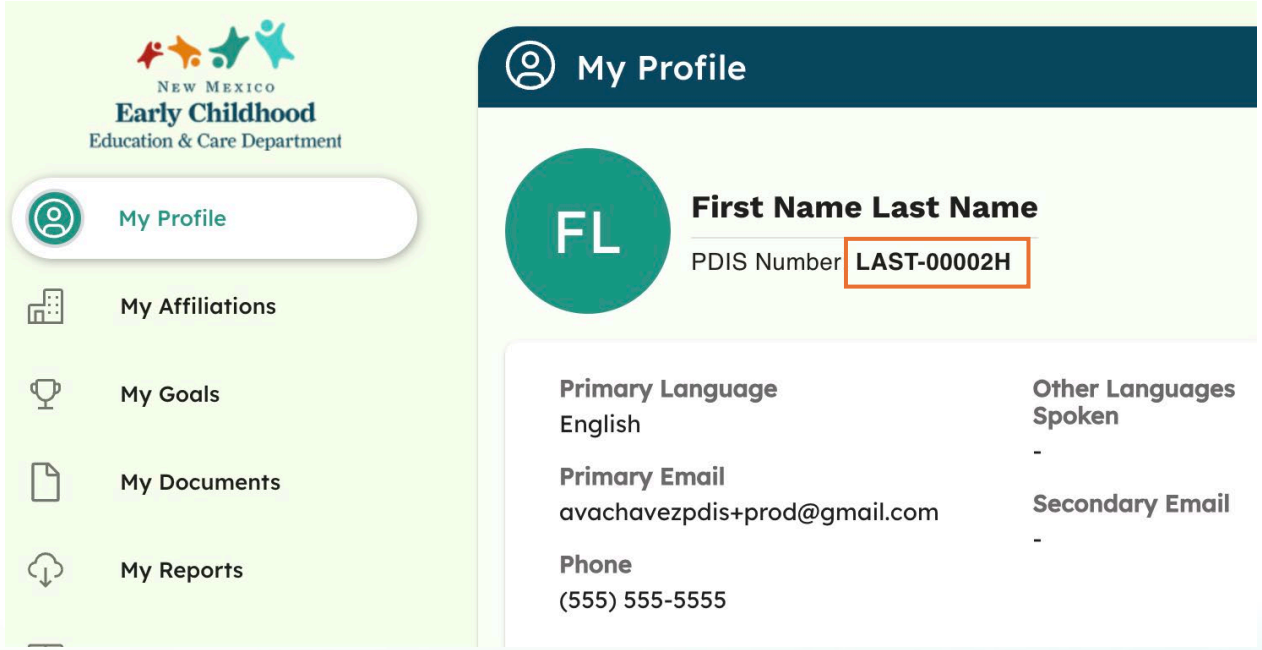
Section 1 Frequently Asked Questions Recap

Question: Where is my PDIS Number?

Answer: Your PDIS number is located under your name on the **My Profile** page.

Question: Why can't I edit some fields?

Answer: Some fields may be tied to your background check and can not be changed within PDIS.



Section 2 Frequently Asked Questions Recap

Question: How can I change my agency profile information?
Answer: This can only be done by ECECD. Please reach out to us (PDIS-support@ececd.nm.gov) for any changes that are needed.

Question: What is my employee's PDIS number?
Answer: 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.

Question: What is my employee's EPICS number?
Answer: If you are trying to link an employee background check, your employee will need to give you their EPICS number after they pass their background check.

Section 3 Frequently Asked Questions Recap

Question: I uploaded a document, but it does not appear. Why?
Answer: Clicking the refresh button in your browser should fix this issue.

Question: What file types can I upload?
Answer: Files must be one of the following types: PDF, JPEG (JPG), PNG, GIF, DOCX (DOC), XLSX (XLS), PPTX (PPT), or CSV.

Question: What is the maximum file size I can upload?
Answer: Files cannot exceed 10 MB.

Question: I can't edit or delete a certain document. Why?
Answer: **You cannot edit** a document if it is attached to a goal and verified by your employer or ECECD. **You cannot edit** a document that is attached to a goal.

Question: Why does preview not seem to be working?
Answer: Only images (JPEG, JPG, PNG or GIF) and PDFs support previews. Previewing PDFs might be blocked by your browser settings.

Section 4 Frequently Asked Questions Recap

Question: How do you delete a goal?
Answer: Goals cannot be deleted. If a goal was created in error, it may be marked Inactive.

Question: Should you mark a professional development goal as Inactive once it is complete?
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Appendix – Account Setup for ECECD Agency Admins

Appendix Table of Contents

- Objectives
- Key Terms
- ECECD Users -- Account Setup
- Return to Agency Admin Account Setup Instructions

Objectives

By the end of this topic, users will…

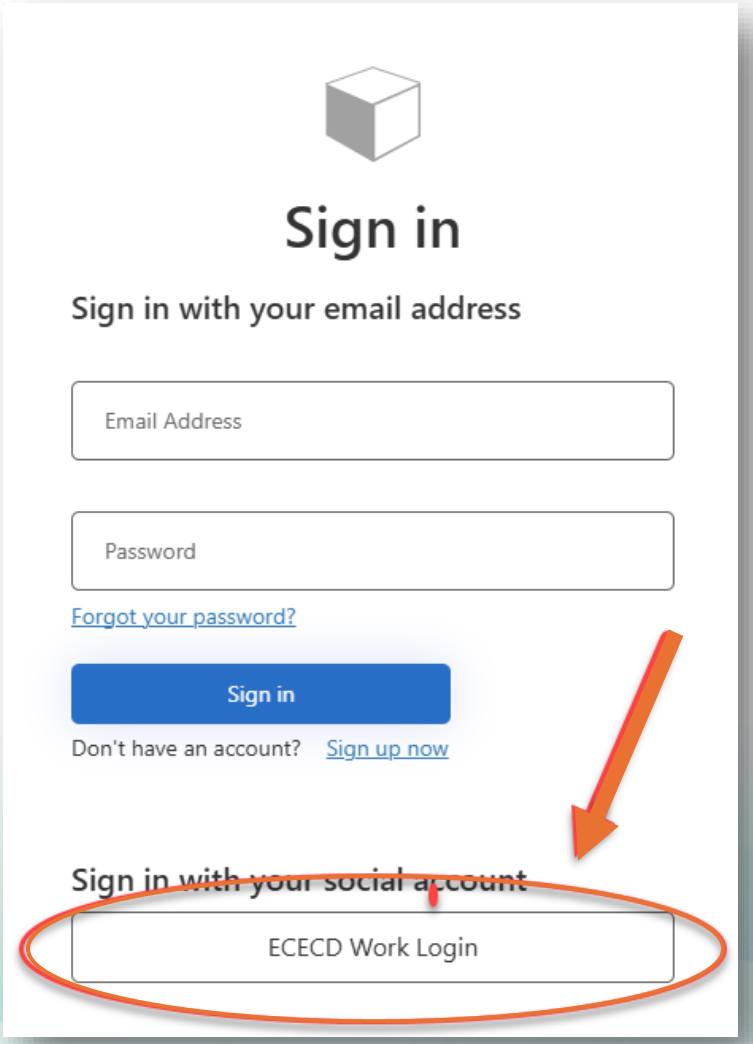
- Sign in to their PDIS Account using their ECECD Email Address

Key Terms

- ECECD Employee – person directly employed by ECECD
  - Has an ECECD work email address
  - Works with Early Childhood Education Agencies
- Agency – This is your early childhood education or care employer
  - Depending on your role at ECECD, you may or may not be affiliated with an agency
- Agency Admin – an individual from an agency who can edit, approve and verify submissions

ECECD Users – Account Setup

If you work **directly for ECECD,** use your work login to access PDIS by clicking the **ECECD Work Login** button.



Return to Agency Admin Account Setup Instructions

Now that you have logged in to PDIS using your ECECD credentials, **please return to Slide 13** for instructions on how to Complete Your Profile.