

# Professional Development Information System (PDIS) User Guide

## Agency Admins (Employers)

*February 2026*



NEW MEXICO

**Early Childhood**

Education & Care Department

# Table of Contents

- [Section 1 – Account Setup](#)
- [Section 2 – Roster Management](#)
- [Section 3 – Document Management](#)
- [Section 4 – My Goals](#)
- [Section 5 – Settings, Reports, & Resource HUB](#)
- [Section 6 – Frequently Asked Questions](#)
- [Help and Support](#)

# **Section 1 – Account Setup**



# Section 1 Table of Contents

- [Objectives](#)
- [Key Terms](#)
- [3 Steps for First Time PDIS Users](#)
  - [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!

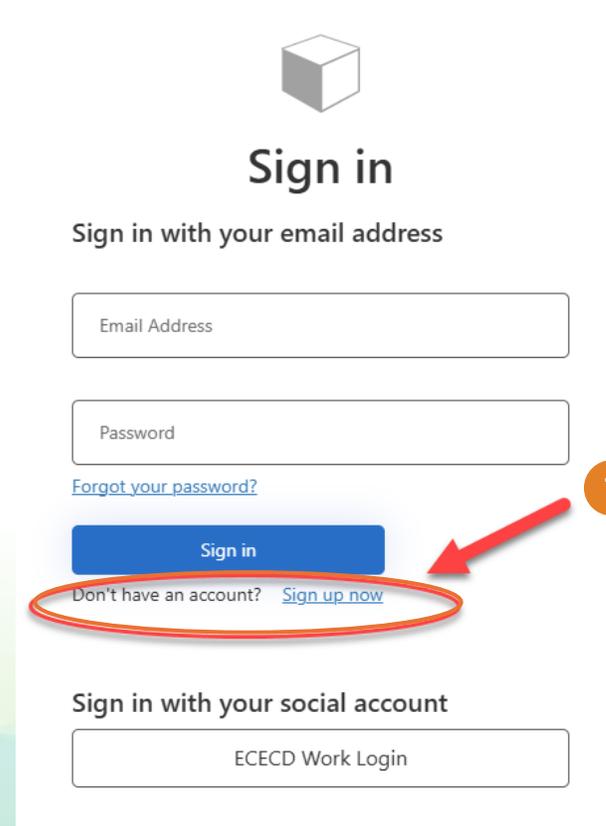


**IMPORTANT:** If you are *directly employed by ECECD* and fulfill the role of an Agency Admin (ex: ECECD Families FIRST), please see the [appendix](#) to set up your account.

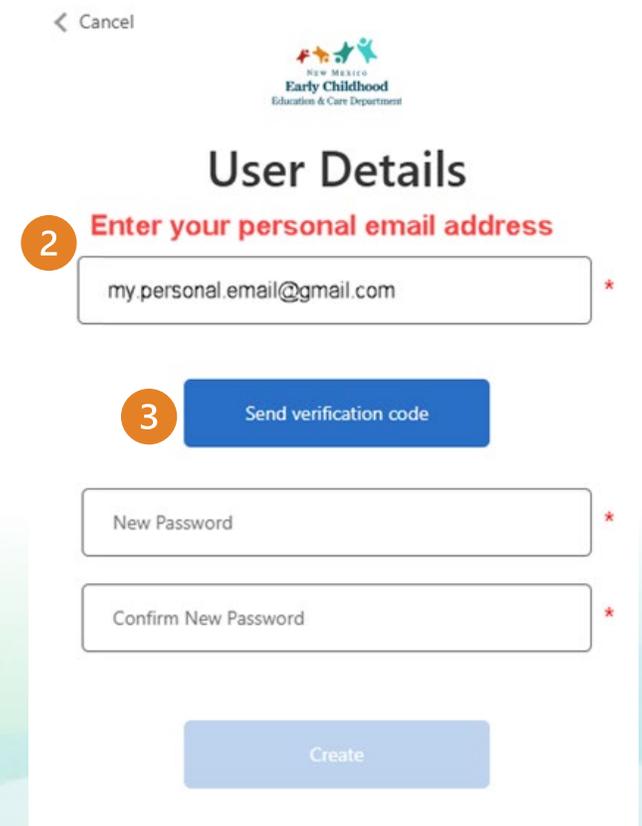
**Return to these instructions starting with Slide 13 – [Complete Your Profile](#).**

# 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.



The image shows a 'Sign in' screen with a 3D cube icon at the top. Below the icon is the text 'Sign in' and 'Sign in with your email address'. There are two input fields: 'Email Address' and 'Password'. Below the 'Password' field is a link 'Forgot your password?'. A blue 'Sign in' button is positioned below the 'Forgot your password?' link. Below the 'Sign in' button is a red circle containing the text 'Don't have an account? Sign up now'. A red arrow points from this circle to the 'Sign up now' link. Below this is the section 'Sign in with your social account' with a button for 'ECECD Work Login'. A small orange circle with the number '1' is located to the right of the 'Sign up now' link.



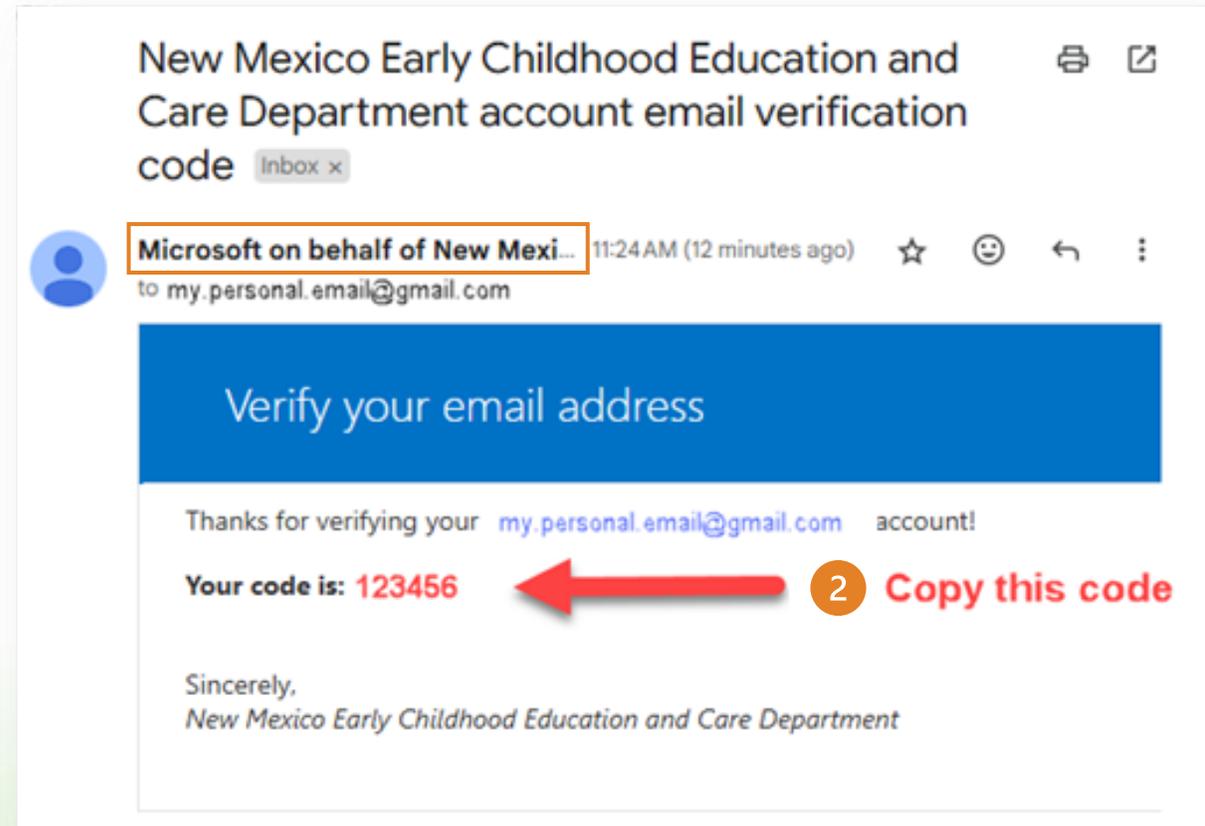
The image shows a 'User Details' screen with a back arrow and 'Cancel' text at the top left. The New Mexico Early Childhood Education & Care Department logo is at the top right. Below the logo is the text 'User Details'. A red circle with the number '2' is to the left of the text 'Enter your personal email address'. Below this is an input field containing 'my.personal.email@gmail.com' with a red asterisk to its right. Below the input field is a blue button with a red circle and the number '3' to its left, containing the text 'Send verification code'. Below the button are two input fields: 'New Password' and 'Confirm New Password', both with red asterisks to their right. At the bottom is a light blue 'Create' button.

# 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.

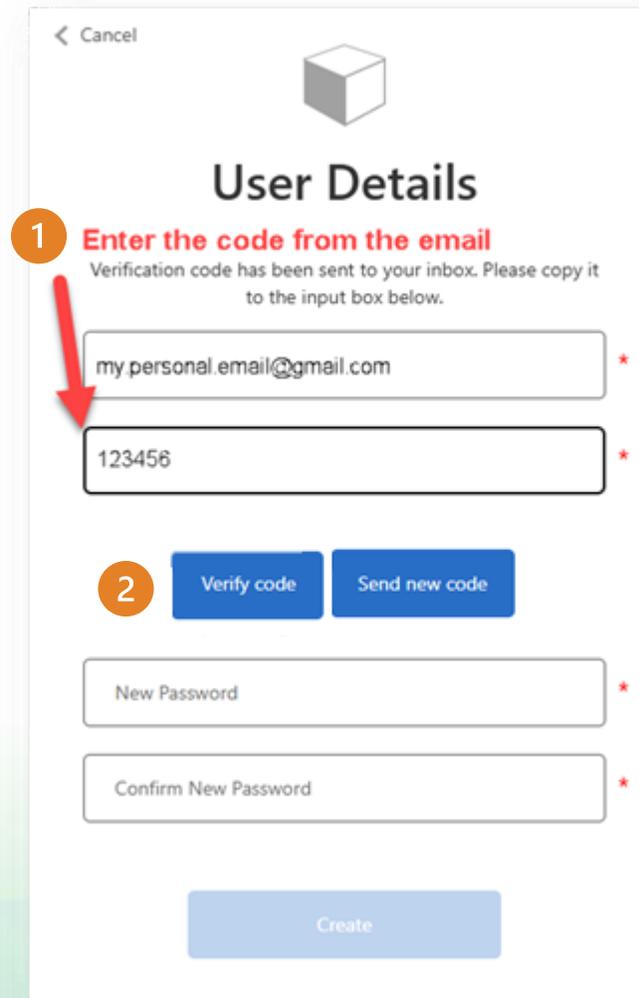


# Enter your Verification Code

1. Enter your verification code into the form.

**i** 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**.



The screenshot shows a mobile application interface for 'User Details'. At the top, there is a 'Cancel' button and a cube icon. Below the title, a red circle with the number '1' and a red arrow points to the first input field, which contains the email address 'my.personal.email@gmail.com'. Below this is a second input field containing the verification code '123456'. A second red circle with the number '2' points to two blue buttons: 'Verify code' and 'Send new code'. Below these are two more input fields for 'New Password' and 'Confirm New Password', each with a red asterisk on the right. At the bottom is a light blue 'Create' button.

# Choose a PDIS Password

**i** 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**.**

Cancel

NEW MEXICO  
Early Childhood  
Education & Care Department

### User Details

E-mail address verified. You can now continue.

my.personal.email@gmail.com \*

Change e-mail

The password must have at least 3 of the following:

- a lowercase letter
- an uppercase letter
- a digit
- a symbol

1 \*\*\*\*\* \*

The password entry fields do not match. Please enter the same password in both fields and try again.

Confirm New Password \*

2 Create

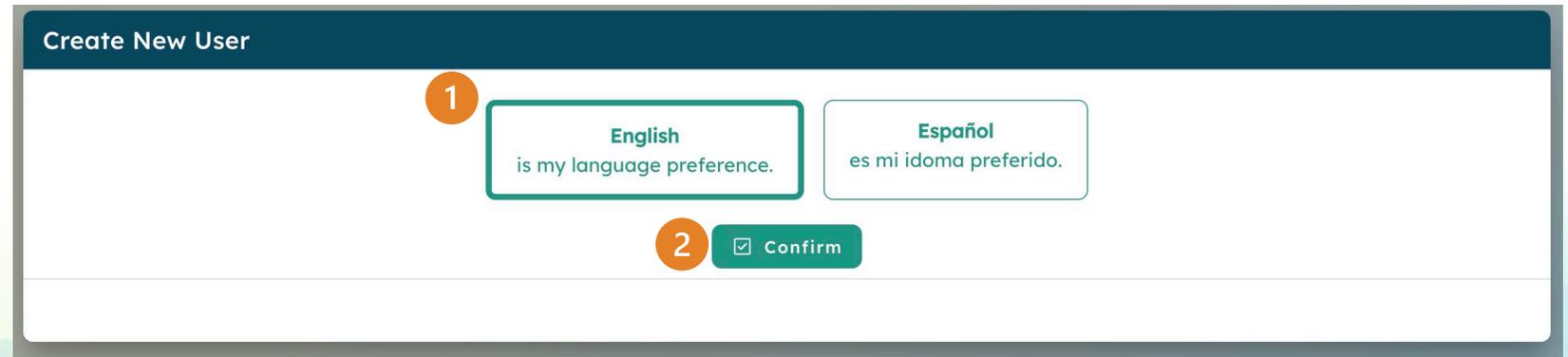
**i** Your password must be between 8 and 64 characters, and include at least 3 of the following:

- 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**.



The screenshot shows a 'Create New User' form with a dark teal header. Below the header, there are two language selection options: 'English is my language preference.' and 'Español es mi idioma preferido.' A red circle with the number '1' is positioned above the 'English' option. Below these options is a 'Confirm' button with a checkmark icon and the text 'Confirm'. A red circle with the number '2' is positioned above the 'Confirm' button.

# Complete New User Form

1. Complete the form  
(All boxes with a \* must be answered).
2. Click **Save Changes**.

### Create New User

1

**English**  
is my language preference.

**Español**  
es mi idioma preferido.

Title  First Name\*  Middle  Last Name\*  Suffix

**Additional Information**

Primary Language\*  Other Languages Spoken

Gender\*  Date of Birth\*

Race\*  Ethnicity\*

2

# 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**.

The screenshot shows a 'Help and Support' form. At the top, there is a header 'Help and Support' with a speech bubble icon. Below this is a section 'Browse Helpful Resources' with a text box containing 'Visit the help section in the Resource HUB to access specific help topics'. The main section is 'Ask ECECD a Question'. It features a dropdown menu labeled 'What type of problem are you experiencing?\*' with a downward arrow. A list of options is shown: 'Technical Support', 'How-To/Guidance', 'General Inquiry', and 'Feedback and Suggestions'. A 'Send' button is located at the bottom left of the form. Three orange circles with numbers 1, 2, and 3 are overlaid on the form: circle 1 is next to the 'Ask ECECD a Question' header, circle 2 is next to the 'Technical Support' option in the dropdown, and circle 3 is next to the 'Send' button.

**i** 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

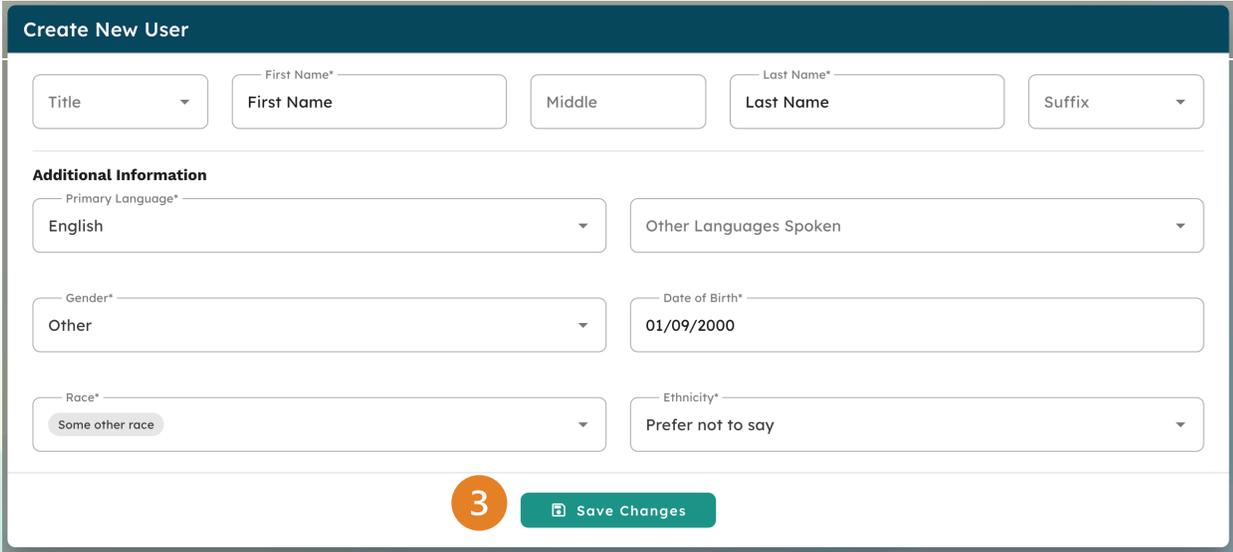
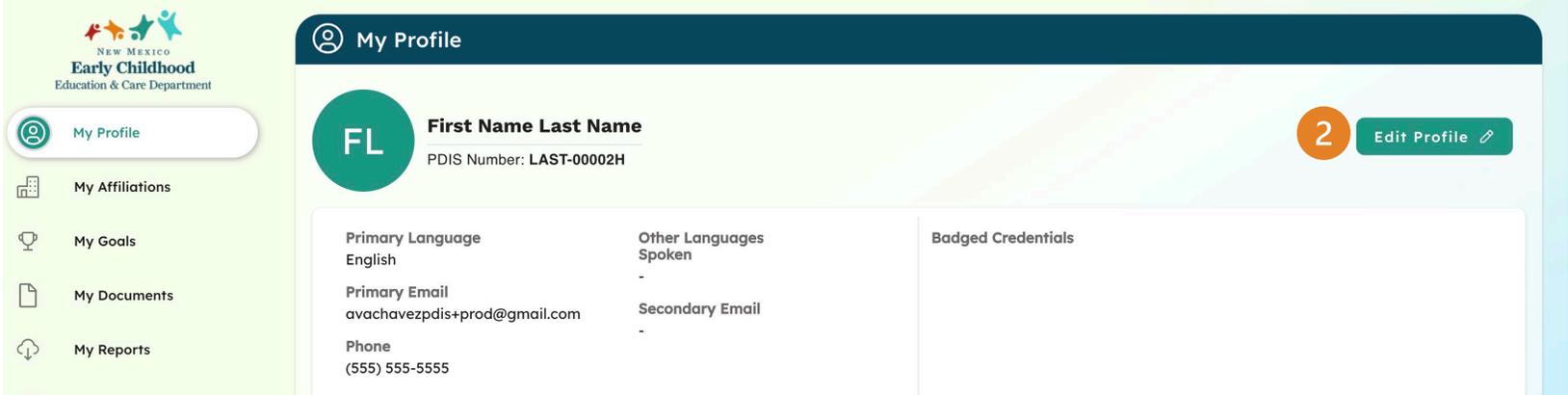
Before you request your agency admin credentials, you will need the following information about your agency to submit along with your request in the [Help and Support](#) tab:

- 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**.



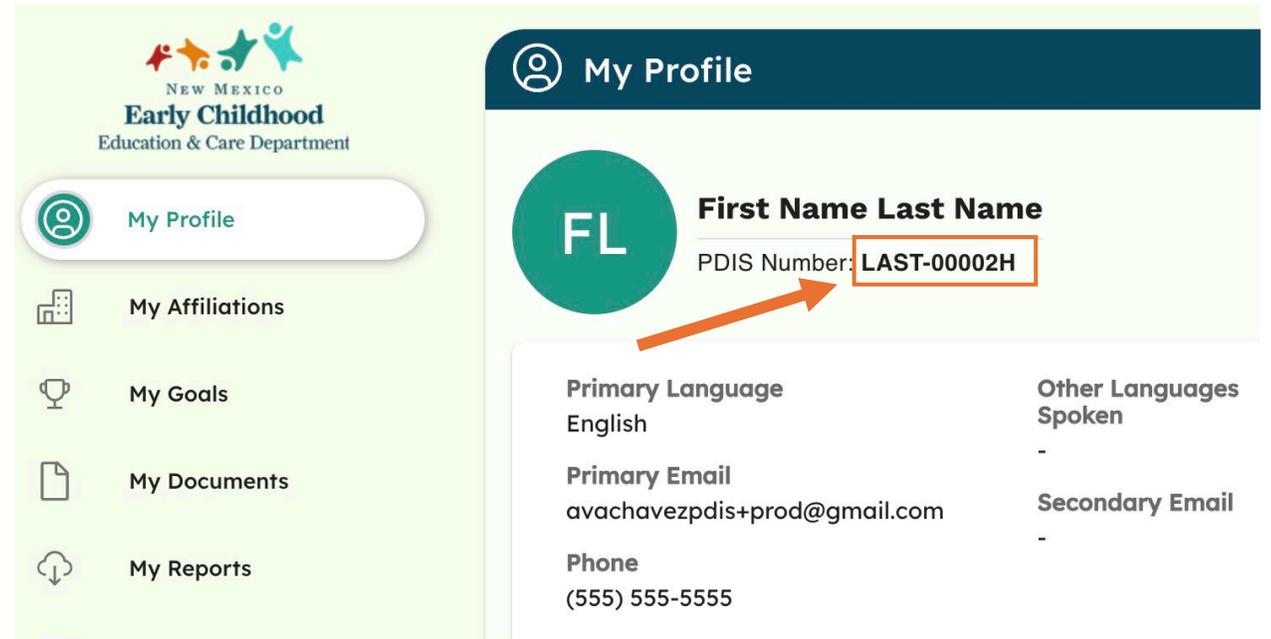
# Section 1 Frequently Asked Questions

## 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**



# Section 2 Table of Contents

- [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.

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

App Version: 2025.1294 | Api Version: 2025.1393

You have 1 new notifications. Click here to view them.

**NEW MEXICO**  
**Early Childhood**  
Education & Care Department

My Profile  
My Affiliations  
My Goals  
My Documents  
My Reports  
Resource HUB  
Help and Support  
My Settings

Agency Tools  
**My Agencies**  
Agency Reports

**Locations**

**Agencies**

All Agencies	ECECD Program	# in PDIS Roster	Star Rating	Counties Served	Active	
RS21	Child Care Center	3		Bernalillo	Yes	<a href="#">View Roster</a>

Items per page: 25 0-0 of 0

# 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.

**Location Dashboard**

Location > Location Dashboard

**ABCD123 Child Care** Edit

PDIS Number: **ORG-00000H** | ECECD License # (If applicable):

Program Setting Child Care Center	Current Star Rating -	FOCUS Expiration -	
Last Updated By Firstname Lastname	Phone Number* (505) 555-1212	Address 132 Main Street NE Albuquerque, NM 87110	Counties Served Bernalillo
Origin PDIS	Program Director Name Firstname Lastname	Program Director Email personal_email@gmail.com	Agency Website URL

**Employee Roster** Active (3) Pending (0) Inactive (0) + Add Employee

**i** **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 screenshot shows the 'Employee Roster' interface. At the top right, there are filters for 'Active (3)', 'Pending (0)', and 'Inactive (0)', along with a '+ Add Employee' button (marked with a red circle 1). Below the filters, the 'Active Employees (3)' section displays a card for 'Jane Doe', PM, with PDIS ID 'DOEJ-000005' and '1 Goals in Progress'. A 'Create Affiliation' modal form is open over the roster. In this form, the 'Search by PDIS Number' field contains 'LAST-0009FL' (marked with a red circle 2) and an 'Invite User To PDIS' button is visible. The form includes fields for 'User Name' (First Name Last Name), 'User Email' (FirstName.LastName@gmail.com), 'Date of Hire\*', 'Job Title\*', 'Role Effective Start Date\*', 'Employment Type\*' (with a dropdown), 'Less Than 20 Hours Per Week?' (with a dropdown set to 'No'), '\$ Wage\*', 'Wage Type\*' (with a dropdown), and 'Ages Worked With' (with a dropdown). At the bottom of the form, there is a 'Pending' status bar, a 'Cancel' button, and a 'Save Changes' button (marked with a red circle 3).

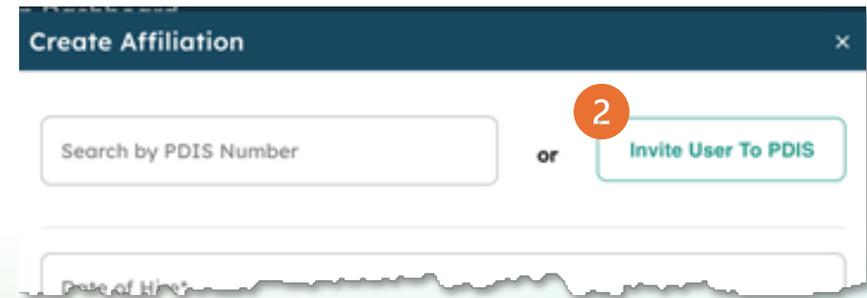
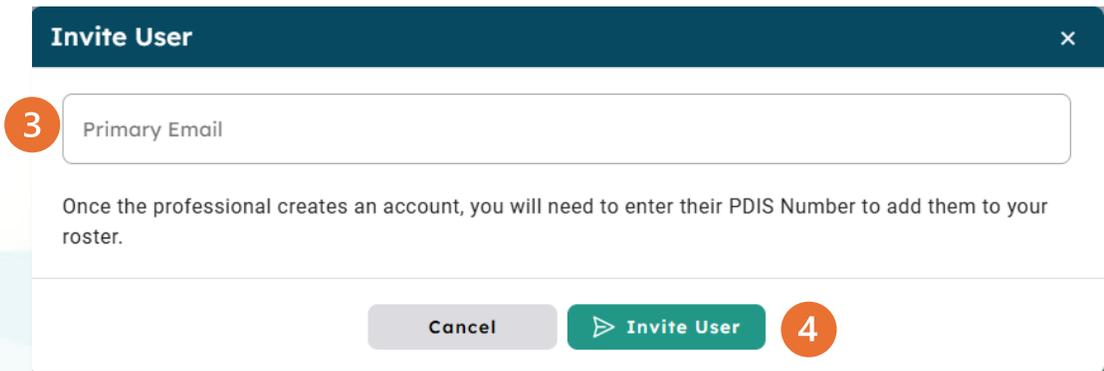
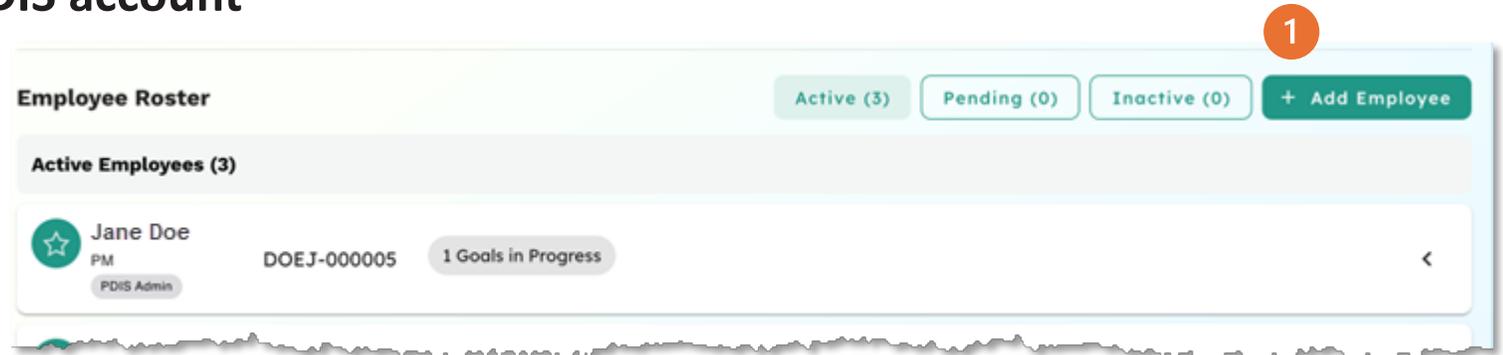
**i** The employee will be notified of your request to affiliate with them.

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.

The screenshot displays the 'Employee Roster' interface. At the top right, there are three filter buttons: 'Active (3)', 'Pending (0)', and 'Inactive (0)', which are circled in orange. To the right of these buttons is an 'Add Employee' button. Below the filters, the section is titled 'Active Employees (3)'. It lists three employees, each with a star icon, a role, a name, an ID, and a 'PDIS Admin' tag. The first employee is a Director with ID DOEJ-000005. The second is a Teacher with ID NEWT-000009 and '1 Goals in Progress'. The third is a Teacher with ID LAST-00002H. Each entry has a chevron icon on the right.

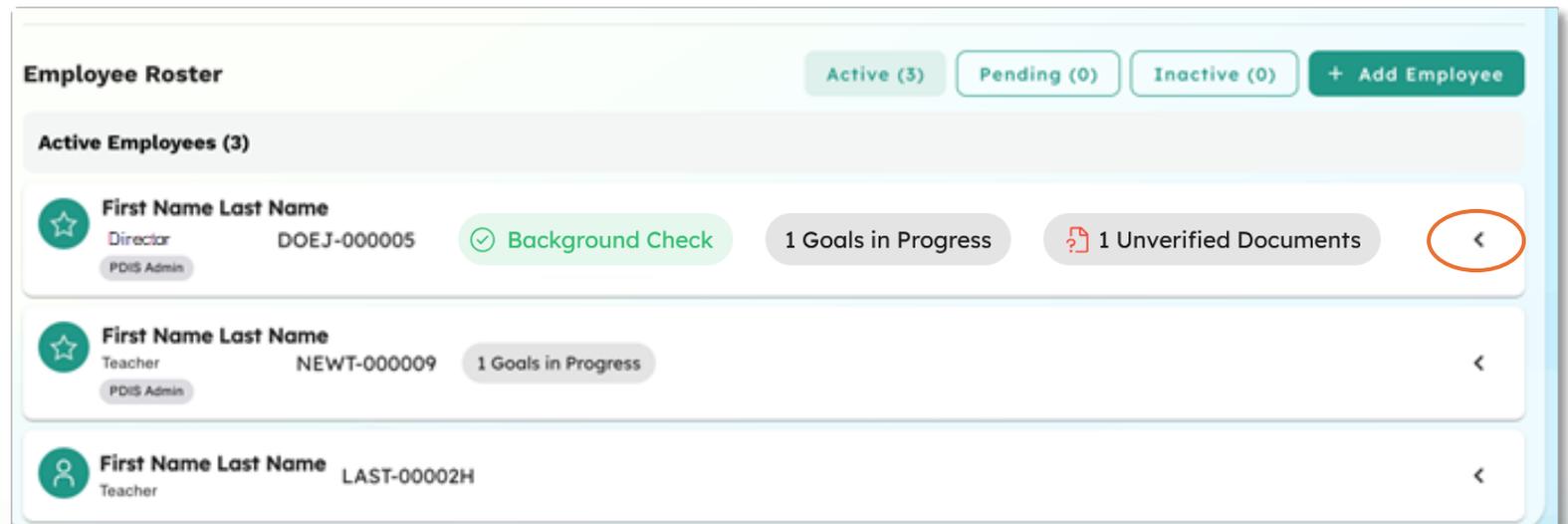
Role	First Name Last Name	ID	Goals
Director	First Name Last Name	DOEJ-000005	
Teacher	First Name Last Name	NEWT-000009	1 Goals in Progress
Teacher	First Name Last Name	LAST-00002H	

# 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:

- Go to an employee's PDIS profile and click **View Profile as Admin**.
- View and Manage **Active Goals**.
- View, Manage, and Verify **Documents attached to Goals**.
- Click the three-dot menu to access other **Roster Management** functions.

The screenshot displays the 'Employee Roster' interface. At the top, there are filters for 'Active (3)', 'Pending (0)', and 'Inactive (0)', along with an '+ Add Employee' button. Below this, the 'Active Employees (3)' section is shown. The first employee, a Director (DOEJ-000005), is collapsed. The second employee, a Teacher (NEWT-000009), is expanded. This expanded view includes a 'View Profile as Admin' button (labeled 'A') and a three-dot menu (labeled 'D'). Below the employee information, a goal titled 'Annual - Child Care Home (Registered)' is shown with columns for 'Goal Start', 'Target End', and 'Completed'. A table of documents is displayed below the goal, with columns for 'Document Name', 'Document Date', 'Areas of Competency', 'Hours', 'Status', and 'Actions'. A document titled 'Training' is listed with a date of 2/11/2025 and a status of 'Not Verified' (labeled 'C'). The third employee, a Teacher (LAST-00002H), is collapsed.

# 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.

The screenshot displays the 'Employee Roster' interface. At the top, there are filters for 'Active (3)', 'Pending (0)', and 'Inactive (0)', along with a '+ Add Employee' button. Below this, a section titled 'Active Employees (3)' lists three employees. The first employee is a Director (DOEJ-000005) with a 'PDIS Admin' role. The second employee is a Teacher (NEWT-000009) with a 'PDIS Admin' role and a 'View Profile as Admin' button. The third employee is a Teacher (LAST-00002H). A table below the list shows a document titled 'Training' dated 2/11/2025 with competency areas 'Assessment of Children and Programs, Family Collaboration'. A context menu is open over the second employee, listing actions: 'Manage Employee's Affiliation', 'Manage Employee's Goals', 'Manage Employee's Documents', 'Allow Employee to Manage this Roster', 'Request FOCUS Equivalency for Employee', and 'Remove Employee from Active Roster'.

Document Name	Document Date	Areas of Competency
<input type="checkbox"/> Training	2/11/2025	Assessment of Children and Programs, Family Collaboration

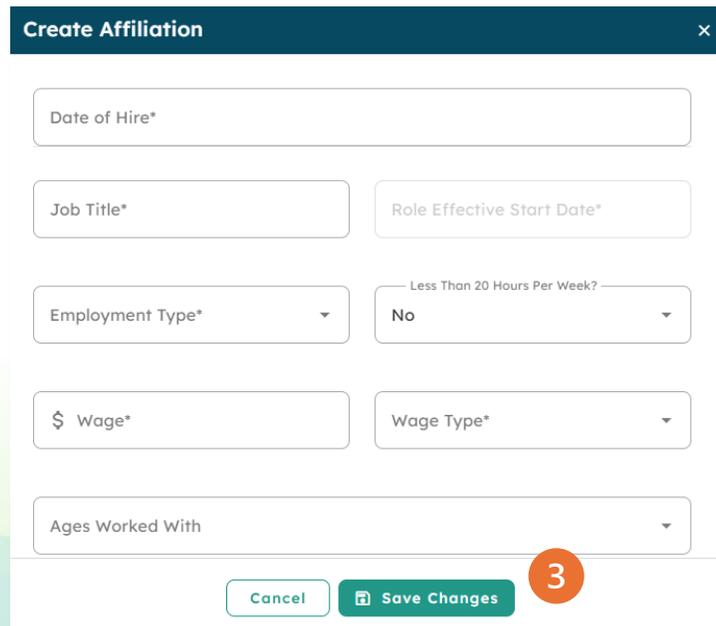
# Pending Roster

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**.



The screenshot shows the 'Employee Roster' interface. At the top right, there are three tabs: 'Active (1)', 'Pending (1)', and 'Inactive (0)'. The 'Pending (1)' tab is circled in orange and has a red circle with the number '1' above it. To the right of these tabs is a green button labeled '+ Add Employee'. Below the tabs, the section is titled 'Pending Employees'. A table row is visible with columns for 'FirstName', 'LastName', and 'LAST-123ABC'. To the right of this row are two buttons: 'Decline Affiliation Request' and 'Make Active'. A red circle with the number '2' is placed above the 'Make Active' button.



The screenshot shows the 'Create Affiliation' form. It has a dark blue header with the title 'Create Affiliation' and a close button 'x'. The form contains several input fields and dropdown menus: 'Date of Hire\*' (text input), 'Job Title\*' (text input), 'Role Effective Start Date\*' (text input), 'Employment Type\*' (dropdown menu), 'Less Than 20 Hours Per Week?' (dropdown menu with 'No' selected), '\$ Wage\*' (text input), 'Wage Type\*' (dropdown menu), and 'Ages Worked With' (dropdown menu). At the bottom of the form, there are two buttons: 'Cancel' and 'Save Changes'. A red circle with the number '3' is placed above the 'Save Changes' button.

# 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**.

The screenshot shows the 'Employee Roster' interface. At the top, there are buttons for 'Active (2)', 'Pending (0)', 'Inactive (1)', and '+ Add Employee'. Below this, the 'Inactive Employees' section is highlighted with a blue bar and a red 'A' callout. A table lists an inactive employee with the following details: ID 'LAST-00002H', Date of Hire '1/23/2025', and Termination Date '2/12/2025'. To the right of the employee's name is a 'View Profile as Admin' button and a three-dot menu icon.

The screenshot shows the 'Employee Roster' interface. At the top, there are buttons for 'Active (3)', 'Pending (1)', 'Inactive (1)', and '+ Add Employee'. Below this, the 'Inactive Employees' section is highlighted with a blue bar and a red 'B' callout. A table lists an employee with the following details: ID 'NEWT-0004YI', Date of Hire '1/1/2025', and Termination Date. To the right of the employee's name is a red 'Set Termination Date' button and a red circle with the number '1'.

The screenshot shows a dialog box titled 'Remove Employee from Active Roster'. It has a close button (X) in the top right corner. The main text is 'Enter Termination Date'. Below this is a text input field labeled 'Termination Date'. At the bottom, there are two buttons: 'Cancel' and 'Remove Employee from Active Roster'. A red circle with the number '2' is positioned to the right of the dialog box.

# 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**.

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

**Employee Roster** Active (3) Pending (0) Inactive (0) + Add Employee

**Active Employees (3)**

First Name Last Name	Director	DOEJ-000005	
Firstname Lastname	Teacher	NEWT-000009	<b>View Profile as Admin</b>

Annual - Child Care Home (Registered) Goal Start: 1/1/2025 Target End: 1/1/2026 Completed: 0 of 6 Hours (0%)

Document Name	Document Date	Areas of Competency	Hours	Status	Actions
Training	2/11/2025	Assessment of Children and Programs, Family and Community Collaboration	5	Not Verified	

Viewing First Last's profile (NEWT-000009) as admin Return to your roster

**FL First Last** Teacher **Edit Profile**

Primary Language English	Other Languages Spoken -	Badged Credentials
Primary Email avachavezpdis+prod@gmail.com	Secondary Email -	
Phone (555) 555-5555		

# 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**.

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

The screenshot shows the 'Employee Roster' interface. At the top, there are filters for 'Active (3)', 'Pending (0)', and 'Inactive (0)', along with an '+ Add Employee' button. Below this, a list of 'Active Employees (3)' is shown. The first row is expanded, showing details for a Director (DOEJ-000005) and a Teacher (NEWT-000009). A 'View Profile as Admin' button is circled with a '2'. A '1' is placed over the first employee row. Below the employee list is a table with columns: Document Name, Document Date, Areas of Competency, Hours, Status, and Actions. A row for 'Training' is visible. A '3' is placed over the 'My Profile' button. The 'My Profile' page is shown below, with a 'Return to your roster' link. The 'Current Affiliations' section is highlighted with a '4' and a 'Manage' button. The details for the 'RS21' affiliation are as follows:

RS21	
Job Title	ECECD Program
Teacher 2	Child Care Center
Role Effective Start Date	Employment Type
7/1/2025	Full Time
Ages Worked With	Wage
2, 3, 4, 5, 6+ Years Old	\$20.25 Per Hour

# Change Role (2/2)

**i** 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**.

The image shows two screenshots from a web application. The top screenshot is the 'My Affiliations' page for an employee named 'First Last' (Teacher). It features a banner with the employee's name and title, and a table of affiliations. A table row for 'ABCD123 Child Care' is highlighted, with a 'View' button and a three-dot menu icon. A callout box labeled '2' shows the menu options: 'Change Wage', 'Change Role', and 'History'. The bottom screenshot is a 'Change Role' modal form. It has two columns: 'Current' and 'New or Updated'. The 'Current' column shows 'RS21 Designer' with a start date of '01/01/2025'. The 'New or Updated' column has fields for 'Job Title\*', 'Role Effective Start Date', 'Role End Date', 'Employment Type', 'Less Than 20 Hours Per Week?' (set to 'No'), 'Ages Worked With', and 'Wage' (set to '\$ 1.00 Per Hour'). A callout box labeled '3' highlights the 'New or Updated' section. At the bottom of the modal are 'Cancel' and 'Save' buttons, with a callout box labeled '4' pointing to the 'Save' button.

# 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**.

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

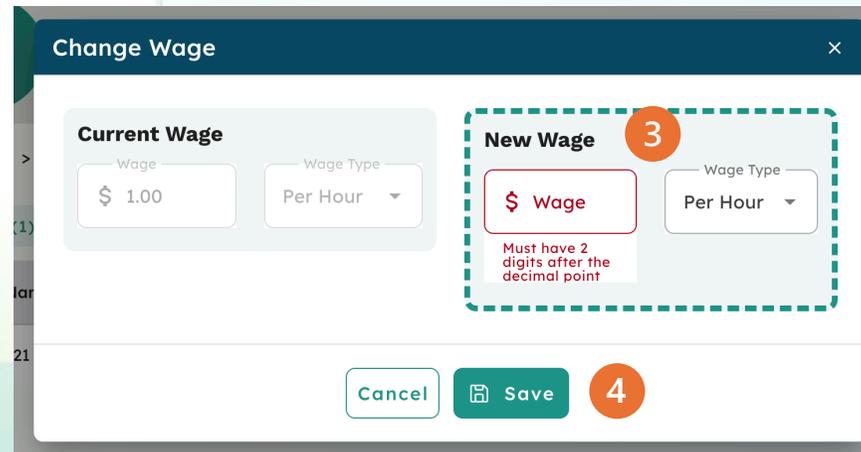
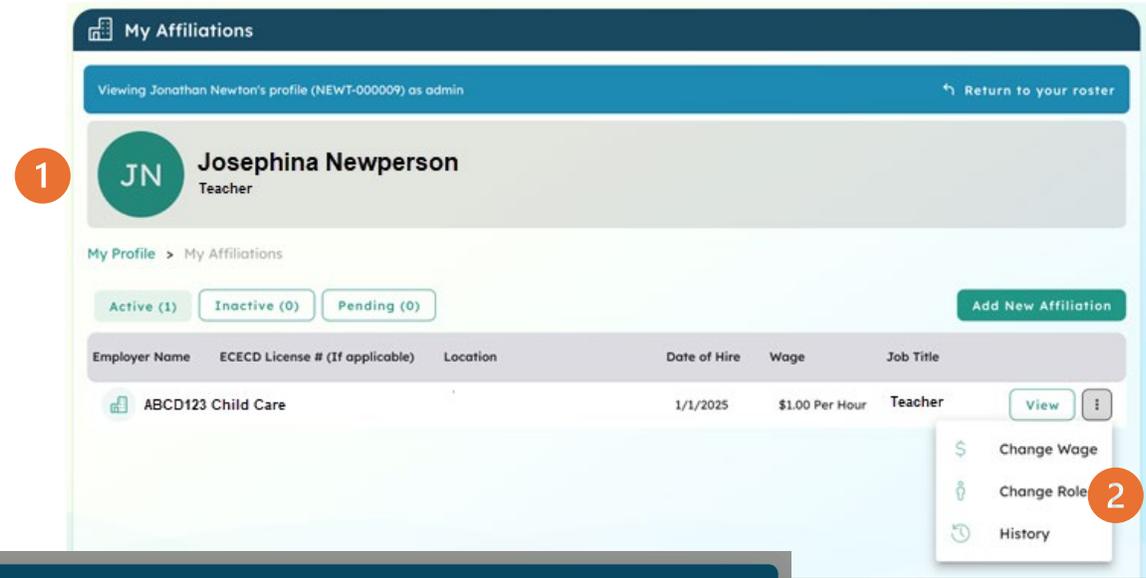
The screenshot shows the 'Employee Roster' interface. At the top, there are filters for 'Active (3)', 'Pending (0)', and 'Inactive (0)', along with a '+ Add Employee' button. Below this, a list of 'Active Employees (3)' is shown. The first row is for a 'Director' with ID 'DOEJ-000005'. The second row is for a 'Teacher' with ID 'NEWT-000009'. A 'View Profile as Admin' button is circled in red and labeled '2'. Below the employee list is a table of documents. The first row is 'Training' dated '2/11/2025' with '5' hours and a status of 'Not Verified'. A 'My Profile' modal is open, showing the profile for 'profile (NEWT-000009) as admin...'. The modal has a 'Return to your roster' button. Under 'Current Affiliations', there is a 'Manage' button labeled '4'. The affiliation details for 'RS21' are as follows:

RS21	
Job Title	ECECD Program
Teacher 2	Child Care Center
Role Effective Start Date	Employment Type
7/1/2025	Full Time
Ages Worked With	Wage
2, 3, 4, 5, 6+ Years Old	\$20.25 Per Hour

# Change Wage (2/2)

**i** 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**.



**i** 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**.

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

The screenshot shows the 'Employee Roster' interface with three tabs: 'Active (3)', 'Pending (0)', and 'Inactive (0)'. The 'Active Employees (3)' section lists three employees. The first is a Director (DOEJ-000005) with a '1' callout. The second is a Teacher (NEWT-000009) with a '2' callout pointing to the 'View Profile as Admin' button. The third is an 'Annual - Child Care Home (Registered)' with a '3' callout. Below this is a table of documents. The 'My Profile' overlay is visible, showing 'Viewing: profile (NEWT-000009) as admin...' and a '4' callout pointing to the 'Manage' button under 'Current Affiliations'. The 'Current Affiliations' section shows details for 'RS21'.

Document Name	Document Date	Areas of Competency	Hours	Status	Actions
<input type="checkbox"/> Training	2/11/2025	Assessment of Children and Programs, Family and Community	5	Not Verified	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Job Title	ECECD Program
Teacher 2	Child Care Center

Role Effective Start Date	Employment Type
7/1/2025	Full Time

Ages Worked With	Wage
2, 3, 4, 5, 6+ Years Old	\$20.25 Per Hour

# View Job History (2/2)

**i** 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**.

**i** 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.

The screenshot displays the 'My Affiliations' interface for an employee named Josephina Newperson. At the top, there is a banner with the employee's name and a 'Return to your roster' link. Below the banner, there are filters for 'Active (1)', 'Inactive (0)', and 'Pending (0)', along with an 'Add New Affiliation' button. A table lists the employee's affiliations, with one entry for 'ABCD123 Child Care' as a 'Teacher' starting on '1/1/2025' at a wage of '\$1.00 Per Hour'. A three-dot menu next to this entry is open, showing options: 'Change Wage', 'Change Role', and 'History'. An 'Affiliation History' modal window is overlaid on the bottom, showing details for the current affiliation starting on 1/6/2025, including job title (Teacher), employment type (Other), role effective start date (1/1/2025), and ages worked with (4, 5 Years Old).

Employer Name	ECECD License # (If applicable)	Location	Date of Hire	Wage	Job Title
ABCD123 Child Care			1/1/2025	\$1.00 Per Hour	Teacher

Affiliation Start - 1/6/2025	
Job Title	Employment Type
Teacher	Other
Role Effective Start Date	Less Than 20 Hours Per Week?
1/1/2025	Yes
Ages Worked With	Wage
4, 5 Years Old	15.00 Per Hour

# 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**.

The screenshot displays the 'Employee Roster' interface. At the top, there are filters for 'Active (3)', 'Pending (0)', and 'Inactive (0)', along with an '+ Add Employee' button. Below this, a list of employees is shown. The first employee, 'Director DOEJ-000005', has a '2' in a red circle next to their name. The second employee, 'Teacher NEWT-000009', has a '1' in a red circle next to their name. A 'View Profile as Admin' button is visible next to the second employee's name, with a three-dot menu icon circled in red. A modal window titled 'Link EPICS Background Check' is open over the second employee's row. This modal contains fields for 'PDIS Name' (ICEK-000APP) and 'PDIS Date of Birth' (1993-10-25). Below these is an 'EPICS Person ID' input field containing '88' and a magnifying glass icon circled in red with a '3'. The modal also shows 'EPICS Person ID Found' and 'EPICS Name' with 'EPICS Date of Birth Matches'. At the bottom of the modal, there are 'Cancel' and 'Link EPICS Person ID' buttons, with the latter circled in red with a '4'. To the right of the modal, a dropdown menu is open, listing several actions: 'Manage Employee's Affiliation', 'Manage Employee's Goals', 'Manage Employee's Documents', 'Allow Employee to Manage this Roster', 'Request FOCUS Equivalency for Employee', 'Link EPICS Background Check to Employee' (highlighted with an orange border), and 'Remove Employee from Active Roster'.

# 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](mailto: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

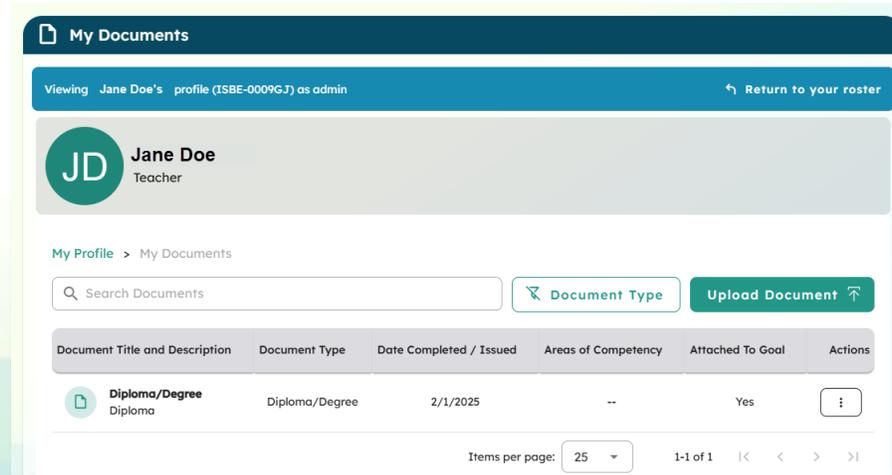
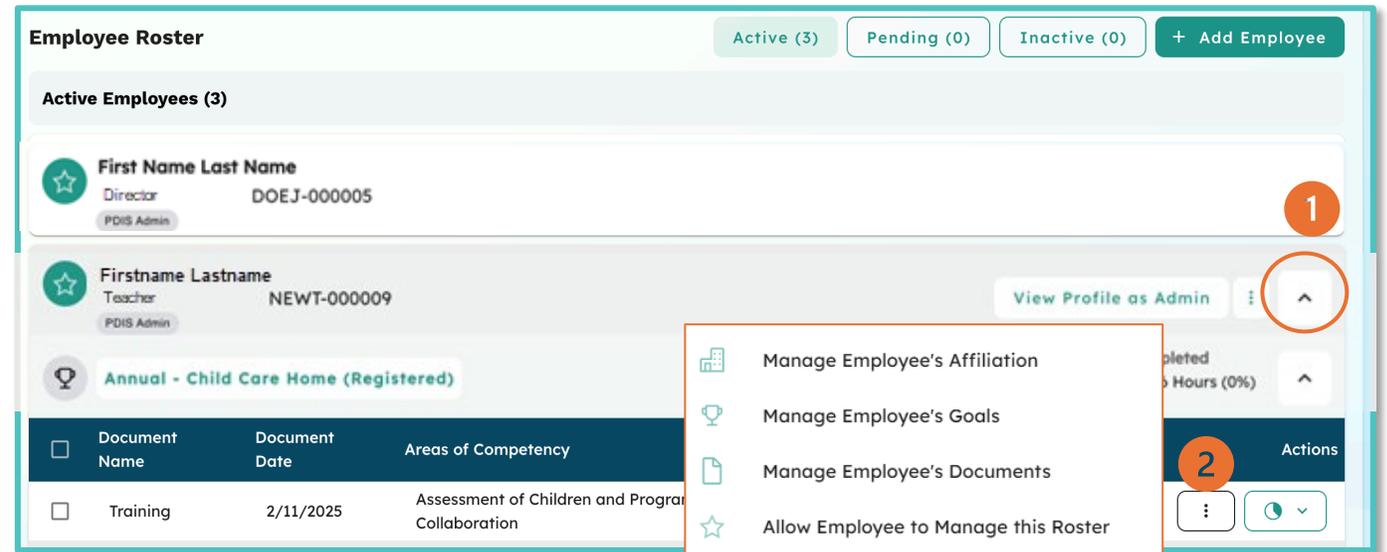
- Affiliation – A relationship where an early childhood professional is employed by an agency.
- Agency – An early childhood education or care employer.
- Agency Admin – An individual from an agency who can edit, approve and verify submissions.
  - Full Admin privileges allow management of all *editable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

# Manage Documents – Navigation

**i** 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**.



**i** 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.

---

2

Edit Documents.

---

3

Download Documents.

---

4

Preview Documents.

---

5

Search & Filter Documents.

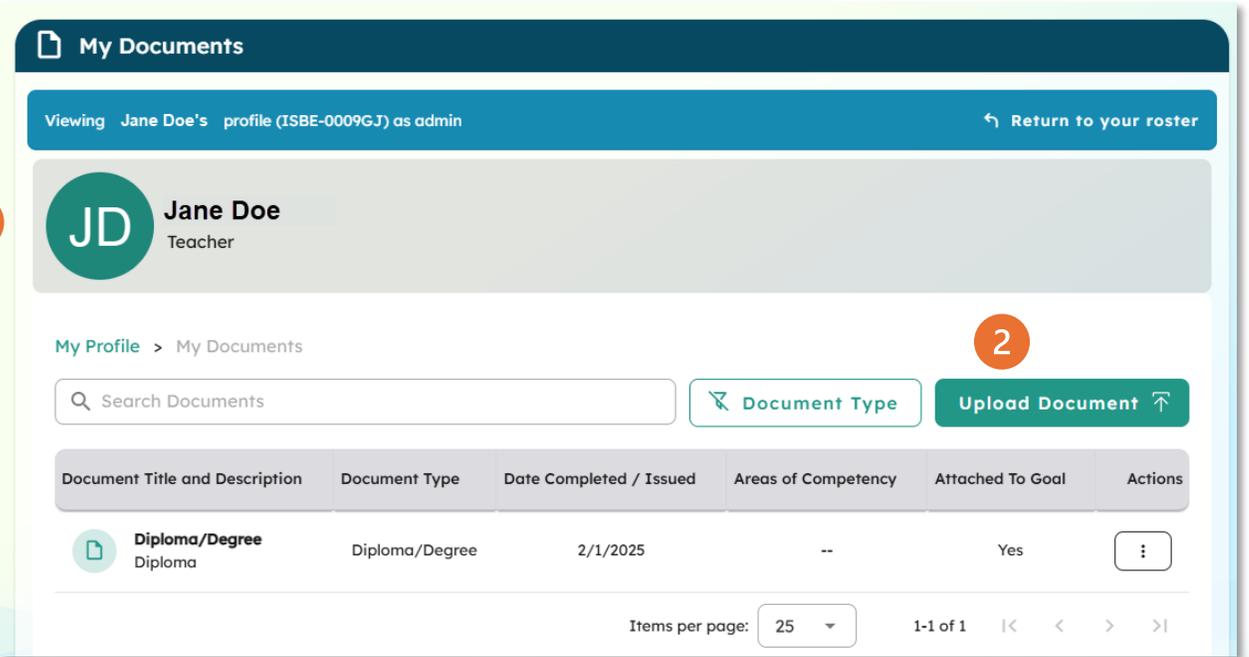
---

# 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](#).



The screenshot shows the 'My Documents' page for Jane Doe, a Teacher. The page header includes 'My Documents' and 'Viewing Jane Doe's profile (ISBE-0009GJ) as admin'. A 'Return to your roster' link is visible. The user's profile 'Jane Doe, Teacher' is shown with a '1' callout. Below the profile, there is a search bar for 'Search Documents', a 'Document Type' filter, and an 'Upload Document' button with a '2' callout. A table lists documents with columns: Document Title and Description, Document Type, Date Completed / Issued, Areas of Competency, Attached To Goal, and Actions. One document is listed: 'Diploma/Degree' with a '3' callout on the document icon. The footer shows 'Items per page: 25' and '1-1 of 1'.

Document Title and Description	Document Type	Date Completed / Issued	Areas of Competency	Attached To Goal	Actions
 Diploma/Degree Diploma	Diploma/Degree	2/1/2025	--	Yes	

# 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

The screenshot shows a modal window titled "Add Document" with a close button (X) in the top right corner. The form contains the following elements:

- 1**: A dashed border box containing the text "Drop your file here or browse..." and "Supports Image and Document Files".
- 2**: A dropdown menu labeled "Document Type\*" with "Training" selected.
- 3**: A text input field labeled "Name of Course or Training\*".
- A text input field labeled "Document Description".
- A dropdown menu labeled "Areas of Competency".
- A checkbox labeled "Infant and Toddler Training?".
- 4**: A "Save Document" button at the bottom right, next to a "Cancel" button.

# 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**.

**i** 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

The screenshot displays the 'My Documents' page for Jane Doe, a Teacher. The page includes a search bar, a 'Document Type' filter, and an 'Upload Document' button. A table lists documents with columns for 'Document Title and Description', 'Document Type', 'Date Completed / Issued', 'Areas of Competency', 'Attached To Goal', and 'Actions'. The document 'My Training Certificate' is highlighted. A three-dot menu is open, showing options: 'Edit Document', 'Download Document', 'Preview Document', and 'Delete Document'. The 'Edit Document' modal window is open, showing fields for 'Document Type' (Training), 'Name of Course or Training\*' (My Training Certificate), 'Document Description', 'Areas of Competency' (Assessment of Children and Programs), 'Infant and Toddler Training?' (No), and 'Training Location or Platform (e.g. CNM or NMELSY)' (CNM). The 'Save Changes' button is highlighted.

Document Title and Description	Document Type	Date Completed / Issued	Areas of Competency	Attached To Goal	Actions
My Training Certificate	Training	1/15/2025	Assessment of Children and Programs	No	⋮

# 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.

The screenshot shows the 'My Documents' page for Jane Doe, a Teacher. The page includes a search bar, a 'Document Type' filter, and an 'Upload Document' button. A table lists documents with columns for title, type, date, competency, and goal. A dropdown menu is open for the 'My Training Certificate' document, showing options: Edit Document, Download Document, Preview Document, and Delete Document. Red callout numbers 1, 2, and 3 highlight the profile name, the document row, and the dropdown menu respectively.

Document Title and Description	Document Type	Date Completed / Issued	Areas of Competency	Attached To Goal	Actions
My Training Certificate	Training	1/15/2025	Assessment of Children and Programs	No	

- Edit Document
- Download Document
- Preview Document
- Delete Document

# 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.

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

The screenshot displays the 'My Documents' interface for Jane Doe, a Teacher. The interface includes a search bar, a 'Document Type' filter, and an 'Upload Document' button. A table lists documents, with 'My Training Certificate' selected. A three-dot menu is open over this document, showing options: 'Edit Document', 'Download Document', 'Preview Document', and 'Delete Document'. A pop-up window titled 'File Preview: My Training Certificate' shows a preview of the document. Red numbered callouts (1-4) highlight key steps: 1. Viewing Jane Doe's profile, 2. Finding the document, 3. Clicking the three-dot menu, and 4. The document preview window.

**i** 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.

The screenshot shows the 'My Documents' page for Jane Doe, a Teacher. The page includes a search bar labeled 'Search Documents', a 'Document Type' filter button, and an 'Upload Document' button. Below these is a table with columns: Document Title and Description, Document Type, Date Completed / Issued, Areas of Competency, Attached To Goal, and Actions. A document titled 'My Training Certificate' is listed with a date of 1/15/2025 and an area of competency 'Assessment of Children and Programs'. A red circle '1' is next to the user profile, and a red circle '2' is next to the 'Actions' column.

- Background Check - Annual Signed Statement
- Certification
- Diploma/Degree
- First Aid/CPR
- License
- Quorum Training

# 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.*

### My Certificate

Uploaded by First Name Last Name

---

**Date Completed**  
1/15/2025

**Document Type**  
Training

**Reminder**  
-



# 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**.

The screenshot shows the 'Employee Roster' interface. At the top, there are filters for 'Active (3)', 'Pending (0)', and 'Inactive (0)', along with a '+ Add Employee' button. Below this, a section titled 'Active Employees (3)' lists three employees. The first employee is a Director with ID DOEJ-000005. The second employee is a Teacher with ID NEWT-000009. The third employee is a Teacher with ID LAST-00002H. A dropdown menu is open for the third employee, showing several options. A red circle with the number '1' highlights the three-dot menu icon for the third employee. A red circle with the number '2' highlights the 'Request FOCUS Equivalency for Employee' option in the dropdown menu.

Document Name	Document Date	Areas of Competency	
<input type="checkbox"/>	Training	2/11/2025	Assessment of Children and Programs, Family Collaboration

- Manage Employee's Affiliation
- Manage Employee's Goals
- Manage Employee's Documents
- Allow Employee to Manage this Roster
- Request FOCUS Equivalency for Employee**
- Remove Employee from Active Roster

The screenshot shows the 'FOCUS Equivalency Review Request' form. It has a title bar 'FOCUS Equivalency Review Request' and a subtitle 'Would you like to request a FOCUS Equivalency Review for the following employee?'. The form contains a dropdown menu for 'Equivalency Requested' and a text area for 'What specifically from your transcript do you believe satisfies this requirement?'. At the bottom, there are two buttons: 'Cancel' and 'Send Request'. A red circle with the number '3' highlights the 'Send Request' button.

# 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...

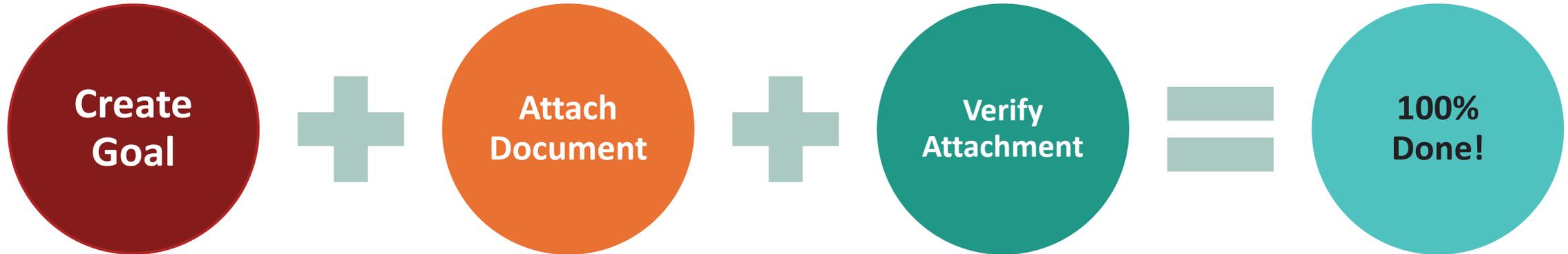
- Manage an employee's goals, including:
  - Adding,
  - Editing,
  - Invalidating & Reactivating,
  - Attaching Proof of Training, and
  - Verifying Proof of Training.
- Understanding how to use attachment functions such as preview, download, edit, and remove to attach documents to goals.

# 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.

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

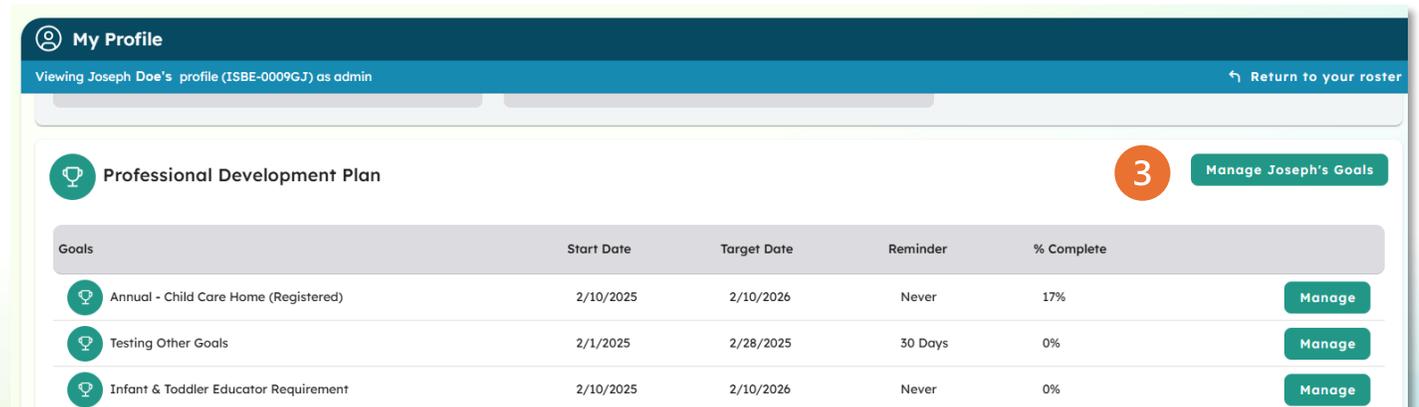
ECECD verifies proof of training separately. Only ECECD verifications officially count toward program compliance.

**i** *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.**

---

**2**

**Edit a Goal.**

---

**3**

**Inactivate & Reactivate a Goal.**

---

**4**

**Attach Proof of Training.**

---

**5**

**Verify Proof of Training.**

---

# 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.

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

Goals	Start Date	Target Date	Affiliated With	Goal Total (Hours or Credits)	% Complete	Has Attachment
<b>Other: Train on Childhood playtime techniques</b> optional description	12/18/2024	6/30/2025	RS21 Test Agency	2 Hours	0	Yes
<b>Cut the Cooties! Communicable Disease Prevention</b> This course covers the CCDF topics of Prevention a...	1/2/2025	4/2/2025	Beata's Test Agency	2 Hours	0	No

**Create Goal**

**Goal Settings**

**Employment Requirement**

Yes  
 No

Goal Name  
Other

Custom Goal Name

Goal Description

Cancel Publish New Goal

# 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**.

The screenshot shows the 'Create Goal' form with the following fields and callouts:

- 1**: Callout pointing to the 'Goal Name' dropdown menu, which is currently set to 'Other'.
- 2**: Callout pointing to the 'Start Date' and 'Target Completion Date' input fields.
- 3**: Callout pointing to the 'Goal Total (Hours or Credits)' input field, which contains the number '1', and the 'Hours or Credits' dropdown menu, which is set to 'Hours'.
- 4**: Callout pointing to the 'Publish New Goal' button.

The dropdown menu for 'Goal Name' is open, showing the following options:

- Annual - Child Care Home Registered
- Annual Full Time - Child Care Center
- Annual Full Time - Licensed Child Care Home
- Annual Part Time - Child Care Center
- Annual Part Time - Licensed Child Care Home
- Infant & Toddler Educator Requirement
- New Hire - Child Care Center
- New Hire - Licensed Child Care Home
- New Hire - Out of School Time
- New Hire - Registered Child Care Home
- Other

# 2 Edit a Goal

**i** 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**.

The screenshot shows the 'My Goals' interface. At the top, there's a search bar and buttons for 'Active (15)', 'Inactive (0)', and '+ Add New Goal'. Below is a table with columns: Goals, Start Date, Target Date, Affiliated With, Goal Total (Hours or Credits), % Complete, and Has Attachment. The first goal is 'Other: Train on Childhood playtime techniques' with a three-dot menu icon next to it. The menu is open, showing 'Manage Goal' and 'Inactivate Goal' options. A red circle '1' is on the 'Goals' column header, and a red circle '2' is on the three-dot menu icon.

Goals	Start Date	Target Date	Affiliated With	Goal Total (Hours or Credits)	% Complete	Has Attachment
<b>Other: Train on Childhood playtime techniques</b> optional description	12/18/2024	6/30/2025	RS21 Test Agency	2 Hours	0	Yes
<b>Cut the Cooties! Communicable Disease Prevention</b> This course covers the CCDF topics of Prevention a...	1/2/2025	4/2/2025	Beata's Test Agency	2 Hours	0	No

The screenshot shows the 'Manage Goal' interface for the goal 'Other: Train on Childhood playtime techniques'. It includes an 'Edit Goal' button and an 'Inactivate Goal' button. Below is a summary table with columns: % Hours Completed, Start Date, Target Completion Date, Reminder, and Employment Requirement. The goal has 150% hours completed, a start date of 12/18/2024, a target completion date of 6/30/2025, a reminder of 45 Days, 90 Days, 60 Days, 30 Days, and an employment requirement of Yes. Below the summary is a table for 'Attached Documents (required for goal completion)' with columns: Document Title, Date Completed / Issued, Areas of Competency, Total Hours, Status, and Actions. One document is listed: 'Amazing Development: Toddlers' with a date of 11/21/2024, areas of competency 'Assessment of Children and Programs, Child Growth, Development and Learning', 3 total hours, and a status of 'Not Verified'. A red circle '3' is on the 'Edit Goal' button.

% Hours Completed	Start Date	Target Completion Date	Reminder	Employment Requirement
150	12/18/2024	6/30/2025	45 Days, 90 Days, 60 Days, 30 Days	Yes

Document Title	Date Completed / Issued	Areas of Competency	Total Hours	Status	Actions
Amazing Development: Toddlers	11/21/2024	Assessment of Children and Programs, Child Growth, Development and Learning	3	Not Verified	

# Prepopulated & Custom Goals

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

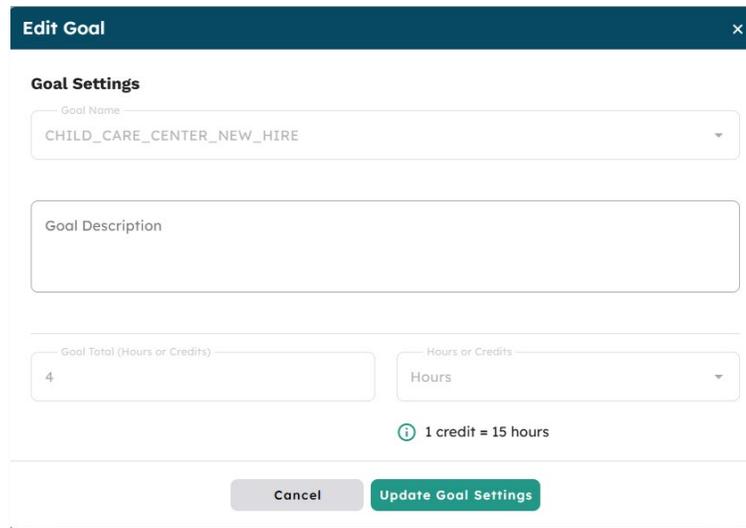
B. If the goal was added as a **Custom Goal (Other)**, you can edit:

- 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**



**Edit Goal**

**Goal Settings**

Goal Name  
CHILD\_CARE\_CENTER\_NEW\_HIRE

Goal Description

Goal Total (Hours or Credits)  
4

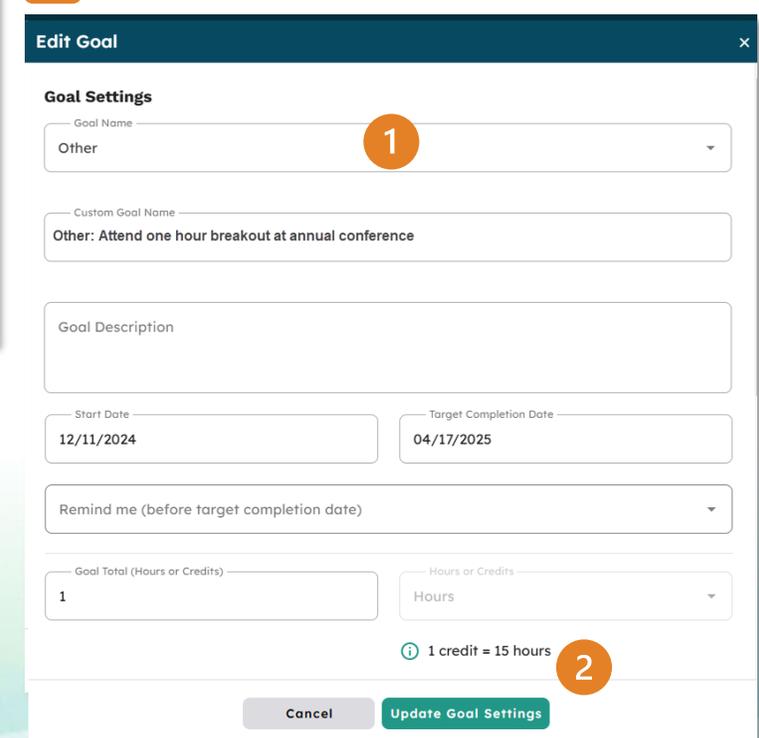
Hours or Credits  
Hours

1 credit = 15 hours

Cancel Update Goal Settings

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

**B**



**Edit Goal**

**Goal Settings**

Goal Name  
Other 1

Custom Goal Name  
Other: Attend one hour breakout at annual conference

Goal Description

Start Date  
12/11/2024

Target Completion Date  
04/17/2025

Remind me (before target completion date)

Goal Total (Hours or Credits)  
1

Hours or Credits  
Hours

1 credit = 15 hours 2

Cancel Update Goal Settings

# 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.

The screenshot shows the 'My Goals' interface. At the top, there's a search bar and buttons for 'Active (15)', 'Inactive (0)', and '+ Add New Goal'. Below is a table with columns: Goals, Start Date, Target Date, Affiliated With, Goal Total (Hours or Credits), % Complete, and Has Attachment. Two goals are listed: 'Other: Train on Childhood playtime techniques' and 'Cut the Cooties! Communicable Disease Prevention'. A three-dot menu is open for the first goal, showing 'Manage Goal' and 'Inactivate Goal' options. A red circle '1' is next to the first goal, and a red circle '2' is next to the 'Inactivate Goal' option.

Goals	Start Date	Target Date	Affiliated With	Goal Total (Hours or Credits)	% Complete	Has Attachment
Other: Train on Childhood playtime techniques optional description	12/18/2024	6/30/2025	RS21 Test Agency	2 Hours	0	Yes
Cut the Cooties! Communicable Disease Prevention This course covers the CCDF topics of Prevention a...	1/2/2025	4/2/2025	Beato's Test Agency	2 Hours	0	No

**i** *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](#).

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

The screenshot shows the 'My Goals' interface. At the top, there's a search bar and buttons for 'Active (15)', 'Inactive (0)', and '+ Add New Goal'. Below is a table of goals:

Goals	Start Date	Target Date	Affiliated With	Goal Total (Hours or Credits)	% Complete	Has Attachment
<b>Other: Train on Childhood playtime techniques</b> optional description	12/18/2024	6/30/2025	RS21 Test Agency	2 Hours	0	Yes
<b>Cut the Cooties! Communicable Disease Prevention</b> This course covers the CCDF topics of Prevention a...	1/2/2025	4/2/2025	Beata's Test Agency	2 Hours	0	No

Number 1 points to the first goal, and number 2 points to the three-dot menu for that goal. The menu options are 'Manage Goal' and 'Inactivate Goal'.

The 'Manage Goal' page for 'Infant & Toddler Educator Requirement' is shown below. It includes a title, a description, and a table with the following data:

% Hours Completed	Start Date	Target Completion Date	Reminder	Employment Requirement
0	1/20/2025	1/20/2026	Never	Yes

Below this is a section for 'Attached Documents (required for goal completion)' with a table that currently has no data. A dropdown menu is open, showing 'Attach Document to Goal' with a plus icon, and two options: 'Add New Document' and 'Add Existing Document'. Number 3 points to the 'Attach Document to Goal' dropdown.

# 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**.

A

Attach an Existing Document

Select From My Documents

How many hours was this training?

0

Cancel Attach

**i** 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**.

The screenshot shows a web form titled "Add Document" with a close button (X) in the top right corner. The form is annotated with two callouts: a blue circle with the number "1" pointing to the file upload area, and an orange circle with the number "2" pointing to the "Save Document" button at the bottom right. The form fields include: a file upload area with the text "Drop your file here or browse..." and "Supports Image and Document Files"; a "Document Type\*" dropdown menu with "Training" selected; a "Name of Course or Training\*" text input; a "Document Description" text area; an "Areas of Competency" dropdown menu; a radio button group for "Infant and Toddler Training?" with "No" selected; a "Training Location or Platform (e.g. CNM or NMELS)\*" text input; an "Online or In Person\*" dropdown menu; a "Name of Training Instructor\*" text input; a radio button group for "Does this training have an expiration date?" with "No" selected; a "Completion Date\*" text input; and an "Amount Toward Goal" text input with the value "0". At the bottom, there are "Cancel" and "Save Document" buttons.

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

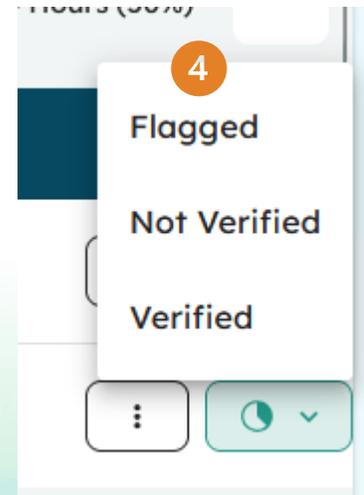
# 5 Verify Proof of Training (Optional)

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.

Document Name	Document Date	Areas of Competency	Hours	Status	Actions
<input type="checkbox"/> Balloon	11/20/2024		2	Verified	
<input type="checkbox"/> Cut the cookies	2/1/2025	Developmentally Appropriate Content	0	Not Verified	

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.

**Other: Train on Childhood playtime techniques** Edit Goal Inactivate Goal

optional description

% Hours Completed	Start Date	Target Completion Date	Reminder	Employment Requirement
150	12/18/2024	6/30/2025	45 Days,90 Days,60 Days,30 Days	Yes

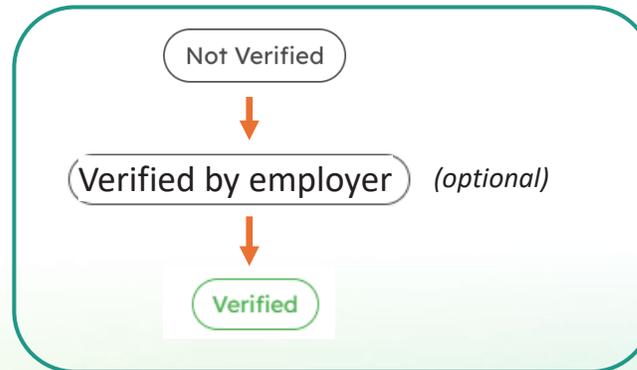
**Attached Documents (required for goal completion)**

Document Title	Date Completed / Issued	Areas of Competency	Total Hours	Status	Actions
 Amazing Development: Toddlers	11/21/2024	Assessment of Children and Programs,Child Growth, Development and Learning	3	Not Verified	

[Attach Document to Goal](#)

 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.

**i** Preview might be blocked by your browser settings.

The screenshot displays the 'My Goals' interface for Jonathan Newton's profile. It shows a list of goals with columns for target dates, status, and completion progress. A 'View/Edit Goal' button is highlighted with a red circle '1'. Below the goals, there is an 'Attached Documents' section with a table listing documents like 'Amazing Development: Toddlers'. A three-dot menu for a document is highlighted with a red circle '2', showing options like 'Edit Document', 'Preview Document', 'Download Document', and 'Remove Document From Goal'. A 'File Preview: My Training Certificate' window is shown with a red circle '3' on its close button.

**i** 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. 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).

The screenshot displays the 'My Goals' interface. At the top, it shows 'My Profile > My Goals' with a search bar and filters for '1 Unverified', 'Active (23)', and 'Inactive (2)'. Below this is a table of goals. One goal is expanded to show details: 'Other: Train on Childhood' with a description 'This course package is required to be completed wi...'. Below the goal details is the 'Attached Documents (required for goal completion)' section, which contains a table with columns: Document Title, Date Completed / Issued, Areas of Competency, Total Hours, Status, and Actions. A document titled 'Amazing Development: Toddlers' is listed with a date of 11/21/2024 and a status of 'Not Verified'. A dropdown menu is open for this document, showing options: 'View/Edit Goal' (marked with a '1'), 'Inactivate Goal', and '2 Unverified Goal Documents'. Another dropdown menu is open for the 'Amazing Development: Toddlers' document, showing options: 'Edit Document', 'Preview Document', 'Download Document' (marked with a '2'), and 'Remove Document From Goal'.

# 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**.

**i** Documents uploaded by Quorum may not be edited.

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

The screenshot displays the 'My Goals' interface for Jonathan Newton's profile. It shows a list of goals with columns for 'Target Date', 'Hours', 'Verified Documents', and 'Unverified Documents'. A goal titled 'Other: FIT 3 year 75 hour g' is selected, showing a progress of 3/75 (4%). A three-dot menu for this goal is open, highlighting 'View/Edit Goal' (marked with a red circle 1). Below the goal, a table of 'Attached Documents' is shown, with one document titled 'Amazing Development: Toddlers' (11/21/2024) and a status of 'Not Verified'. A three-dot menu for this document is open, highlighting 'Edit Document' (marked with a red circle 2). An orange arrow points from this menu to the 'Edit Document' modal window, which is open in the foreground. The modal window contains fields for 'Document Type' (Training), 'Name of Course or Training' (My Training Certificate), 'Document Description', 'Areas of Competency' (Assessment of Children and Programs), 'Infant and Toddler Training?' (No), and 'Training Location or Platform' (CNM). The 'Save Changes' button is highlighted with a red circle 3.

# 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**.

The screenshot displays the 'My Goals' interface for Jonathan Newton's profile. It shows a list of goals with columns for Target Date, Hours, and Documents. A goal titled 'Other: FIT 3 year 75 hour g' is selected, showing 3/75 (4%) hours completed. Below the goal list, there is a table of 'Attached Documents (required for goal completion)'. One document is listed: 'Amazing Development: Toddlers' with a date of 11/21/2024 and a status of 'Not Verified'. A context menu is open over the document, showing options: 'View/Edit Goal' (marked with a red circle 1), 'Inactivate Goal', '2 Unverified Goal Documents', 'Edit Document', 'Preview Document', 'Download Document' (marked with a red circle 2), and 'Remove Document From Goal'.

**i** 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

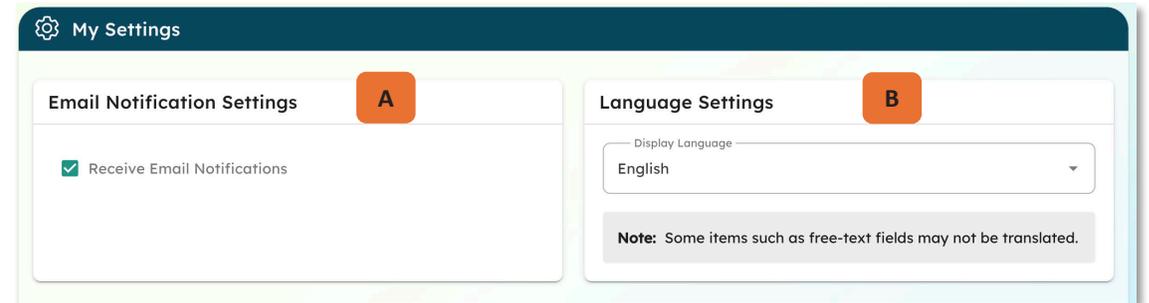
**My Settings** is a place where you can change a couple of options for PDIS Application functionality.

## 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.



## **i** 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**.

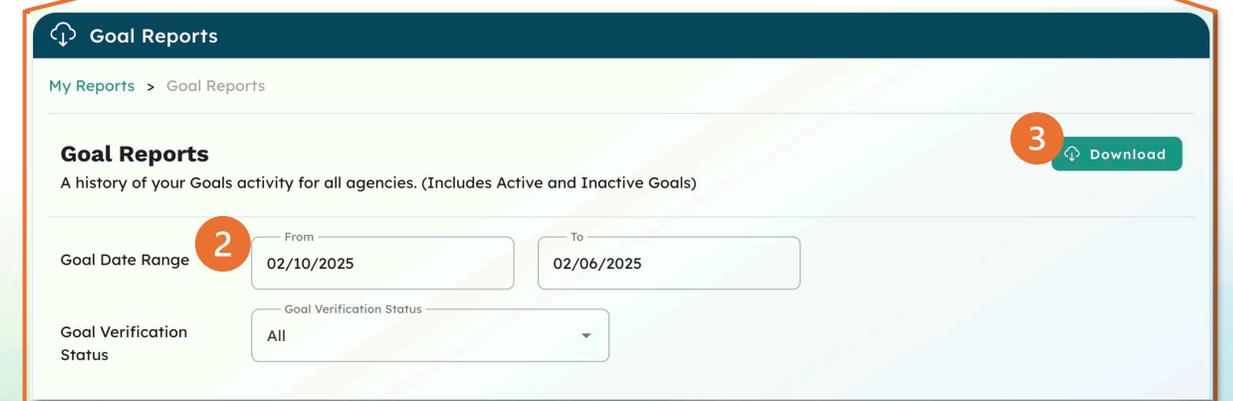
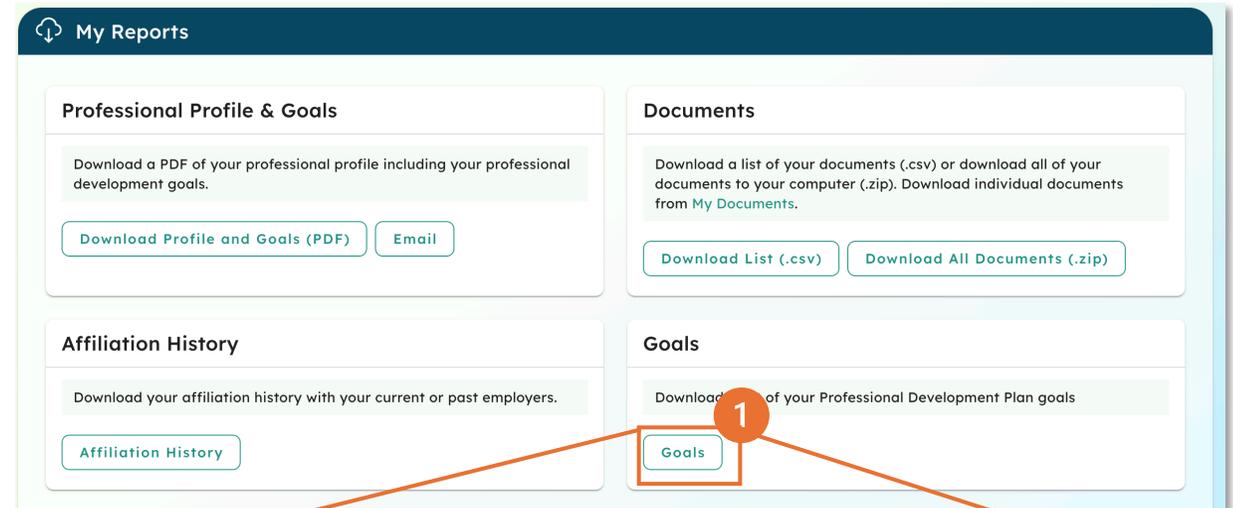
- Click the button of the report you want to run.

## 1. Select Report Options.

- Complete the fields or accept the default values.

## 2. Download the Report (.csv).

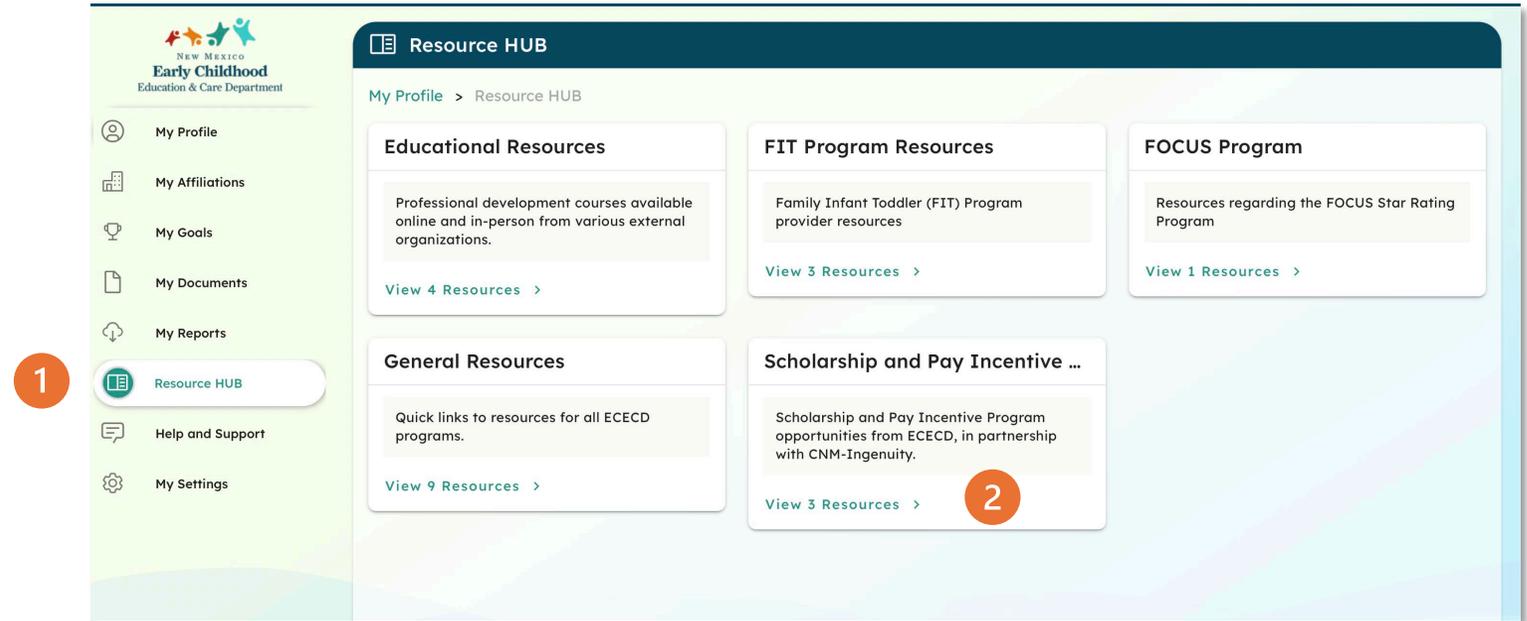
- Click **Download**.
- A **.csv file** will download to your device.



# 3 Resource HUB

The **Resource HUB** is your gateway to community and national resources, including sources online learning, 3<sup>rd</sup> 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

**i** 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 screenshot shows the 'Educational Resources' page of the Resource HUB. On the left is a navigation menu with options: My Profile, My Affiliations, My Goals, My Documents, My Reports, Resource HUB (highlighted), Help and Support, and My Settings. The main content area has a dark blue header 'Educational Resources' and a breadcrumb 'Resources > Educational Resources'. A blue notice box contains a warning icon and text: 'Note: These links are being provided as a convenience and for informational purposes only and include some third party links. These links do not necessarily constitute an endorsement or an approval by the NM ECECD of any third party organization. The NM ECECD bears no responsibility for the accuracy, legality or content of external sites or for that of subsequent links. Contact the external site for answers to questions regarding its...'. Below this are four resource cards, each with a 'Learn More' button. The first card, 'NMELS Login', has a red circle with the number '1' next to its button. The second card, 'Quorum eLearning', has a red circle with the number '2' next to its button. The other two cards, 'UNM Early Childhood Learning' and 'UNM Home Visiting Training', do not have such markers.

**i** 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:

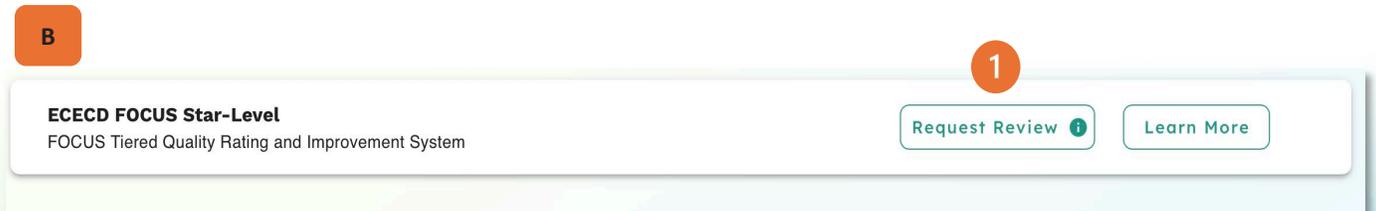
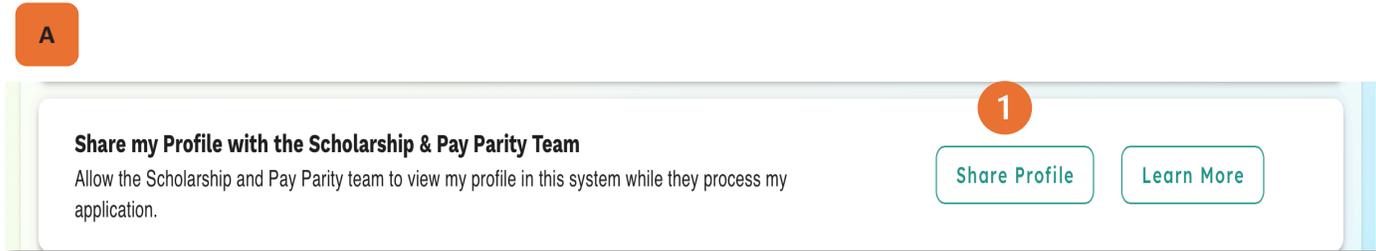
A. In the [Scholarship and Pay Incentive Program](#) resource, there is an option to **Share my Profile with the Scholarship & Pay Parity Team**.

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.

The screenshot shows a 'Help and Support' interface with a dark blue header. It is divided into three main sections, each with an orange letter label in a box:

- Section A: Browse Helpful Resources** (labeled 'A') contains a text box with the instruction: "Visit the help section in the Resource HUB to access specific help topics".
- Section B: Ask ECECD a Question** (labeled 'B') contains two text input fields. The first is labeled "What type of problem are you experiencing?\*" and the second is labeled "Describe your question". Below these fields is a green button with a right-pointing arrow and the text "Send".
- Section C: ECECD Contact Information** (labeled 'C') contains the text: "Website <https://www.nmececd.org>" and "Email PDIS-Support@ececd.nm.gov".

# 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

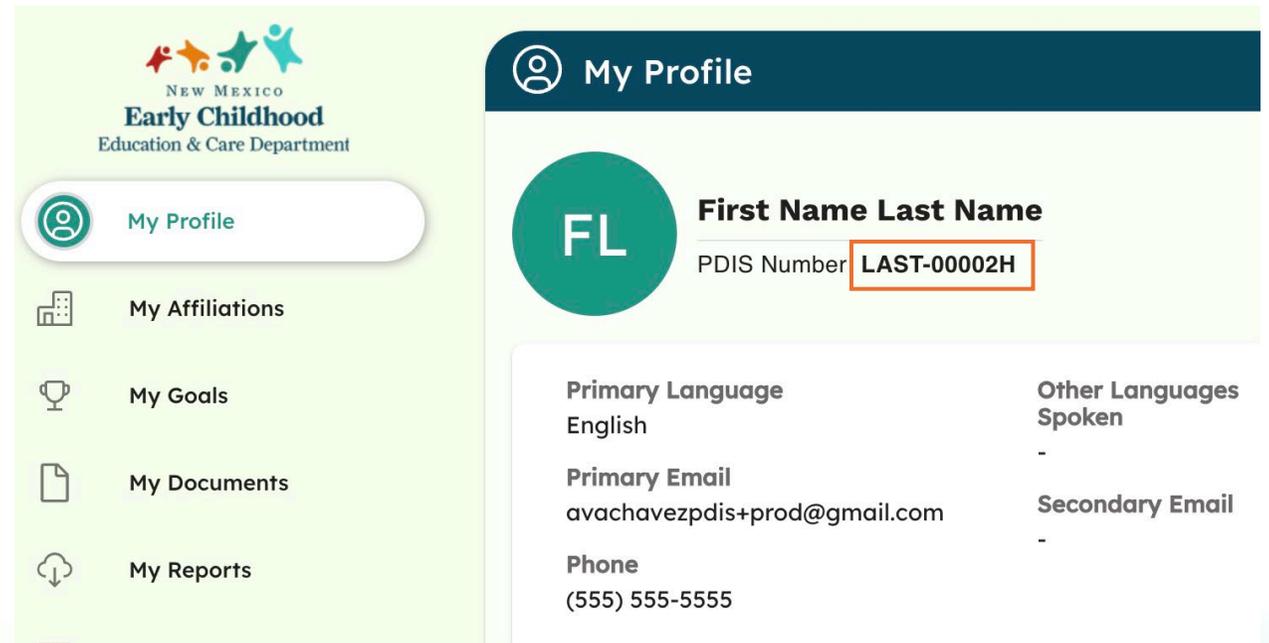
# Section 1 Frequently Asked Questions Recap

## 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.



**NEW MEXICO**  
**Early Childhood**  
Education & Care Department

**My Profile**

**FL** **First Name Last Name**  
PDIS Number **LAST-00002H**

<b>Primary Language</b> English	<b>Other Languages Spoken</b> -
<b>Primary Email</b> avachavezpdis+prod@gmail.com	<b>Secondary Email</b> -
<b>Phone</b> (555) 555-5555	

# 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](mailto: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?**

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 Frequently Asked Questions Recap

**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.

# **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.



## Sign in

Sign in with your email address

[Forgot your password?](#)

[Sign in](#)

Don't have an account? [Sign up now](#)

Sign in with your social account

[ECECD Work Login](#)

# 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.](#)