

EDUCATORS

Educator records can be created within the software to enable services to record and store details regarding the educators.

This tip sheet will walk you through:

- [Creating an Educator](#)
- [General](#)
- [Payment](#)
- [Hours/Note](#)
- [Qualifications](#)
- [Occupants](#)
- [Assistants](#)
- [In Service Training](#)
- [Reminders](#)
- [Fee's](#)
- [Children](#)
- [Sites](#)
- [CCS Personnel Role](#)
- [Docs](#)
- [User/Subscription](#)
- [E-signature](#)
- [File Notes](#)

Summary

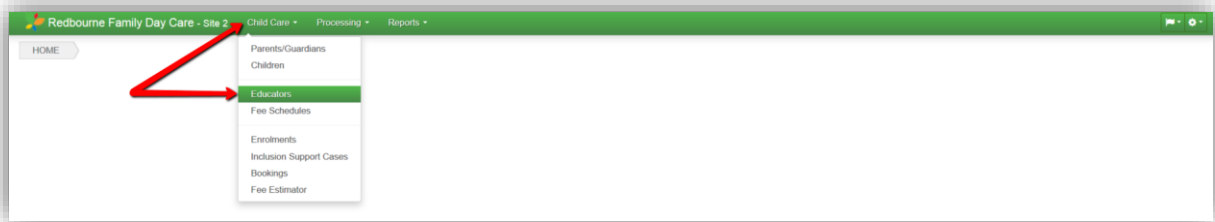
1. Click Child Care
2. Select Educators
3. Create new Educator
4. Enter details of the educator
5. Click Save

EDUCATORS

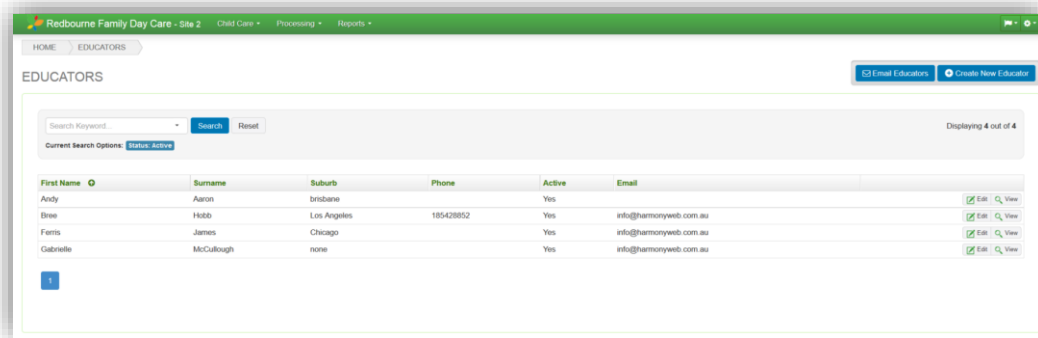
Detailed

Creating and educator

Click 'Child Care' and select 'Educators'.



The following window will appear:



Click 'Create New Educator'.

NOTE: ** means these details are required

You will then get 5 Tabs Educator, General, Payment, Hours/Note and Qualifications. Once you've entered in the appropriate data then click save, you will then be given access to see the rest of the tabs.

Educator Tab

Personal Details

****Salutation** – Select the correct Salutation for the Educator eg Mr, Mrs.

****Name** – Enter the Educator's First Name and Surname.

****Gender** – Select their Gender.

****Date of Birth** – Select on the calendar, or enter as DD/MM/YYYY.

Detailed cont.

Phone Numbers – Enter the Educator’s contact details.

Silent Number – If the telephone number is a silent number, mark this as ‘Yes’.

Ethnicity

****Ethnic Group** – Select an item from the list.

****County of Birth** – Select an item from the list.

****Primary Language** – Select an item from the list.

Selected Other Language – Select an item if the Educator has a second language.

****Registration** – Enter the date the Educator is starting with your service, enter as DD/MM/YYYY, or select it on the calendar.

Previous Occupation – Enter the Educator’s previous job.

****Area** – Select from the list. If the correct value is not in the list, refer to the tip sheet ‘**Service Setup**’.

****Field Worker** – Select the Fieldworker from the list. If the correct person is not in the list, refer to the tip sheet ‘**Service Setup**’.

Address Details

Enter the Educator’s residential and postal address.

If the postal address is the same as the residential, tick ‘Copy residential address’.

General Tab

****Employment Preference** – Select an item from the list.

****Before/After School** – Select an item from the list.

ABN – Enter the Educator’s ABN

Smoker – Select ‘Yes’ if the Educator is a smoker.

Pets – Select ‘Yes’ if the Educator has pets.

Employee – Leave this set to ‘No’.

CRN – Enter the Educator’s CRN.

****PRODA ID (RA Number)**

CCS Person ID – This data will pre-fill once the educator has been submitted to CCS
Working With Children Number and Expiry Date

Car

Car Available – Select whether the Educator has a car available for children in care.

Available Seat Belts – if the Educator has a car, enter the number of seat belts available for children.

Child Requirements

Min.Child Age – Enter the minimum age for children.

Max.Child Age – Enter the maximum age for children.

Max. # Children – Enter the maximum number of children the Educator wishes to or can look after.

Overnight – Select whether the Educator is available to care for children overnight.

Care Location

****Care Location** – Select the care location for the Educator.

Care provider address – If the Care Location is NOT Home Residence, enter the Address, Suburb, State and Postcode of the place the Educator provides care.

Payment Tab

If you have bank details for an Educator, enter them in this tab.

Pay from Account

Bank Id – Select the Scheme's Bank details from the list

NOTE: if you cannot find your scheme details please refer to the tip sheet called 'service setup'

Educator Bank Details

Bank Code – Enter abbreviation for the bank, eg ANZ.

Account Name – Enter the account name for the Educator.

Bank BSB – Enter the Bank's BSB number.

Account Number – Enter the Account number.

Bank Branch – Enter the Branch that the educator has their account at.

Hours/Note Tab

Enter the hours that the Educator is willing to care for children. Enter any notes that you wish.

Qualifications Tab

NQA

NQA id – - If the Educator has a National Quality Assurance Id enter these details.

Date granted – Enter the date it was granted, enter as DD/MM/YY, or select it on the calendar.

Date Sited – Enter the date it was sighted by the office, enter as DD/MM/YYYY, or select it on the calendar.

Certification - If the Educator has been certified, enter these details.

Supervisor ID – Enter the id of the supervisor.

Date granted – Enter the date it was granted, enter as DD/MM/YYYY, or select it on the calendar.

Date Sited – Enter the date it was sighted by the office, enter as DD/MM/YYYY, or select it on the calendar.

**Qualifications

Select or enter the Qualifications that this Educator holds. You must select a Qualification for at least the Qualification One entry.

Qualification One/Two/Three – Select the Qualification/s for the Educator. There are many items on the list, some of the extra items are:

Incomplete Qualifications – Select if the Educator is still working on their Qualification

Information Not Provided – Select if you do not have the details of the Educators Qualifications, you must come back and select their qualifications once you have the details.

No Formal Qualifications – Select if the Educator does not have any formal qualifications

Other – Select if the Educator has a Qualification that is not on the list, then enter the Qualification name in the Other Qualifications box.

Click the **'Save'** button to save the Educators Details.

The rest of the Educator tabs will appear. Enter any further details as required.

Occupants Tab

The educator can still care for their children; however, they cannot claim the Child Care Subsidy or Additional Child Care Subsidy for them. If you do have any educators caring for any of the children mentioned above it is required to keep a record of this information.

Use this tab to enter any people who live in the same place as the Educator.

Click the **'New Occupant'** button to add a new Occupant to the household.

First Name, Last Name – Enter the Occupants name.

Type – Select whether the Occupant is a Child, Partner or Other.

Gender – Select the gender of the Occupant.

Date of Birth – You must enter the date of birth if you selected Child for the Occupant Type, enter as DD/MM/YYYY, or select it on the calendar.

Occupation – You may enter the Occupation of the Occupant.

School – If the occupant goes to school, you may enter the school.

Work Start – End time – You may enter the start and end time the Occupant is working or this can be used for children attending school therefore enter in the school hours.

Phone and Mobile – You may enter the contact numbers for the Occupant.

Co-Educator – Select 'Yes' if the Occupant is a co-educator.

Lives at Home – Select 'Yes' if this Occupant lives at this home.

Smoker – Select 'Yes' if the Occupant is a smoker.

Click the 'Save' button to save the Occupant details.

Address

This may be left blank if the Occupant's address is the same as the Educator. Otherwise enter the Occupant's home address.

Assistants

You may record the details of Assistants within the Educator record. The data you collect will then display in the Educator Assistant Register and also on the Educator Detail report

Please see the tip sheet called 'Educator Assistants' for further instructions.

In Service Training Tab

Enter any In Service Training that the Educator has completed.

Click the 'Create In Service Training' button to add new in-service training to the Educator.

Course Name – Select the name of the In-Service training course.

Course Date – Enter the date the course commenced, enter as DD/MM/YYYY, or select it on the calendar.

Review Date – Enter the date this course is to be reviewed, enter as DD/MM/YYYY, or select it on the calendar.

Clear Review Date – Tick this box to clear the Review date.

Completed – Tick this box if the Educator has completed this course.

Notes – Enter any notes for this course.

Click the **'Save'** button to save the details

NOTE: If the In-Service Training course is not listed, refer to the tip sheet 'Service Setup'.

Reminders Tab

Enter any reminders that you wish to receive a notification about when they are due. If you wish to receive the notification before the actual due date (eg First Aid Certificate, you want to know a few weeks in advance so that you can inform the Educator) enter the date you want to be reminded, rather than the actual due date.

Click the 'New Reminder' button to add a reminder for the Educator.

Reminder Category – Select the Reminder from the list.

Due Date – Enter the date you wish to be reminded, enter as DD/MM/YYYY, or select it on the calendar.

Notes – Enter any relevant notes for this reminder.

Click **'Save'** to save the reminder.

NOTE: If the reminder category you wish to use is not in the Reminder Category List, refer to the tip sheet 'Service Setup'.

Fees Tab

Displays the fee schedules that this educator can use.

Use 'Assign Fee Scheme' to select a previously entered fee schedule for this Educator.

Select the Fee Schedule from the dropdown menu, click the + button and click **'Save'**.

The fee schedule will need to be assigned before you will be able to use it on bookings or timesheets.

Refer to the tip sheet 'Creating a Fee Schedule' for instructions to create Fee Schedules.

Children Tab

Displays the children connected to this Educator.

You can use the **'Assign Children'** button to assign an existing child to the Educator however, this will happen automatically when a booking is created between the child and educator.

Click on the  to unassign the child.

Sites Tab

This tab displays the sites that the Educator belongs to, the educator will automatically be assigned to your site so you will not be required to do anything here.

Approvals/Schemes Tab

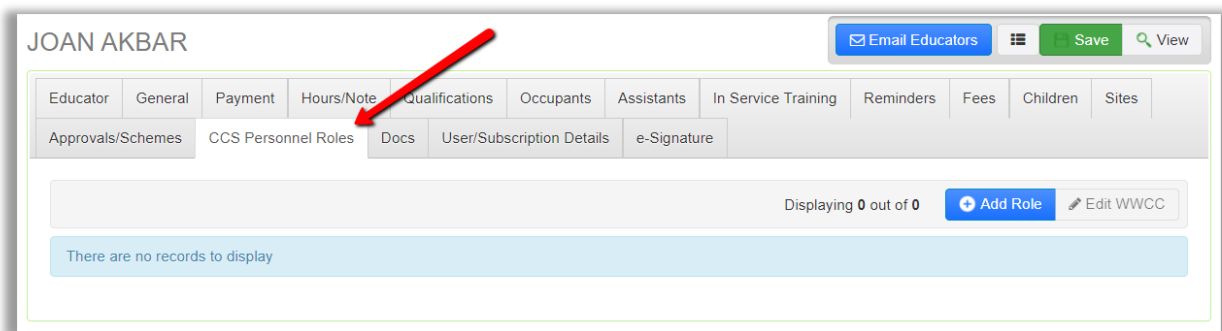
You will no longer require this tab as this relates to CCMS data only.

CCS Personnel Tab

In order to submit session reports to CCSS and claim subsidy etc, you will first need to submit Educators to CCSS and obtain an Educator CCS Personnel ID.

A PRODA ID (RA Number) is required in order to be able to submit the educator to CCSS, if you haven't done this go back to the General Tab, enter the Proda I.D then Save.

Next, open the 'CCS Personnel Roles' tab,



Click the  button. The following window will open:

Create Personnel: Joan Akbar

PRODA ID (RA Number) CCS Personnel Id
5493430274

Service Role

Role: Educator Start Date: 15/06/2018
Approval: [Dropdown] Authorised By: [Dropdown]

Declaration

Have you sighted:

WWCC
A working with children card check issued by the authority responsible for working with children cards in the State or Territory in relation to care provided by a child care service of the Approval. Yes No N/A

Card No. [Text] Expiry [Text] Issuing State [Select...]

Police Check
An Australian National Police Criminal History Check obtained from the relevant state or territory police service or an agency accredited by the Australian Criminal Intelligence Commission, and obtained no more than six months. Yes No N/A

Supporting Document No file chosen
Allowed Document Types: ".pdf", ".png", ".tif", and ".jpg".

Have the above checks revealed any adverse events? Yes No N/A

You will need to select the approval from the dropdown menu, followed by the personnel authorising the submission.

Next, you will need to complete the declaration details and upload the police check.

Once this has been completed, click the button.

Once the record has been submitted, the returned CCS ID will display in the 'CCS Personnel Roles' tab within the educator record:

PRODA ID (RA Number)	Person Id	Approval	Start Date	End Date	Role	Submitted At	
5447398791	0110205013	Redbourne Family Day Care	7/05/2018	31/12/9999	Educator	13/06/2018 11:27 AM	<input type="button" value="Edit"/>

Docs Tab

This is where you can store any documents related to the educator within the educator record.

JOAN AKBAR

Educator General Payment Hours/Note Qualifications Occupants Assistants In Service Training Reminders Fees Children Sites Approvals/Schemes

CCS Personnel Roles **Docs** User/Subscription Details e-Signature File Notes

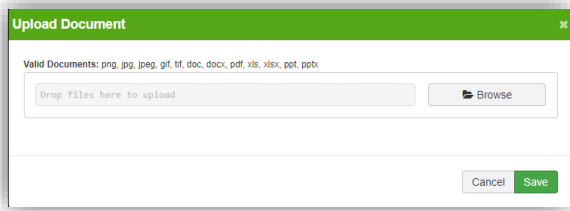
Displaying 2 out of 2

Name	Date Uploaded	Educator View	
Registration Form.pdf	14/09/2021	No	<input type="button" value="Edit Document"/> <input type="button" value="Delete"/> <input type="button" value="Download"/>
Birth Certificate - Joan Akbar.pdf	14/09/2021	No	<input type="button" value="Edit Document"/> <input type="button" value="Delete"/> <input type="button" value="Download"/>

1

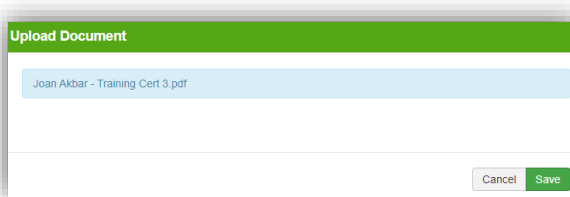
To upload a new document, select the button.


This will open the Upload Document window:



Click the  button, and then locate/select the file you wish to upload.


Once selected, the file will list in the window:



Click the  button, and the record will then be stored within the educator's docs.

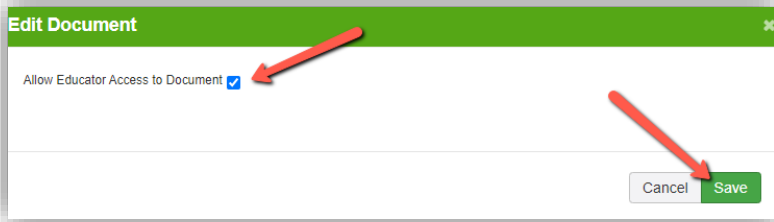
Name	Date Uploaded	Educator View	
Joan Akbar - Training Cert 3.pdf	14/09/2021	No	
Registration Form.pdf	14/09/2021	No	
Birth Certificate - Joan Akbar.pdf	14/09/2021	No	

Any documents stored within the educator's record may also be shared with the educator (via Harmony for Educators).

To share a document, you will need to select the document from the list and click the  button.

Name	Date Uploaded	Educator View	
Joan Akbar - Training Cert 3.pdf	14/09/2021	No	
Registration Form.pdf	14/09/2021	No	
Birth Certificate - Joan Akbar.pdf	14/09/2021	No	

Next, check the 'Allow Educator Access to Document' checkbox and then click the  button.

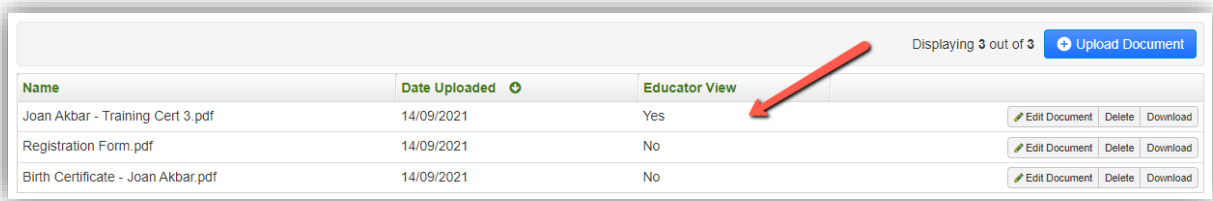


Edit Document

Allow Educator Access to Document

Cancel Save

You will notice that the 'Educator View' column for the selected entry now displays 'Yes':



Displaying 3 out of 3 [Upload Document](#)

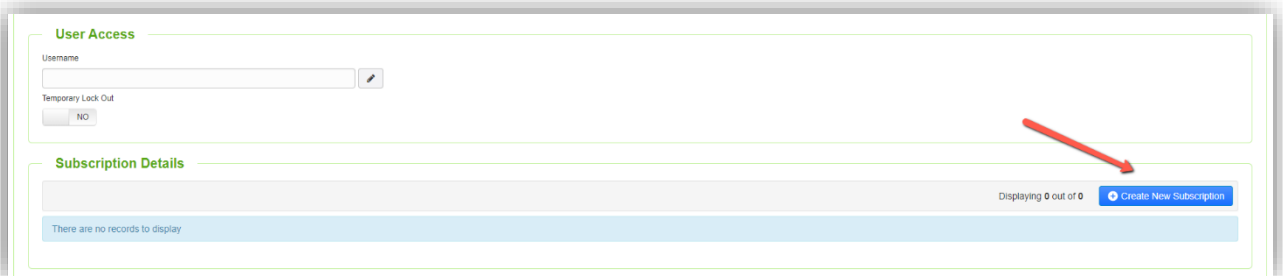
Name	Date Uploaded	Educator View	
Joan Akbar - Training Cert 3.pdf	14/09/2021	Yes	Edit Document Delete Download
Registration Form.pdf	14/09/2021	No	Edit Document Delete Download
Birth Certificate - Joan Akbar.pdf	14/09/2021	No	Edit Document Delete Download

This means that the educator will now be able to view/download a copy of the document (but **not** edit/modify the entry).

Entries which display 'No' in this column will not be visible to the educator.

User/Subscription Details

Educator subscriptions can be created from this tab as well as in the Child Care menu under Educator Subscriptions.



User Access

Username

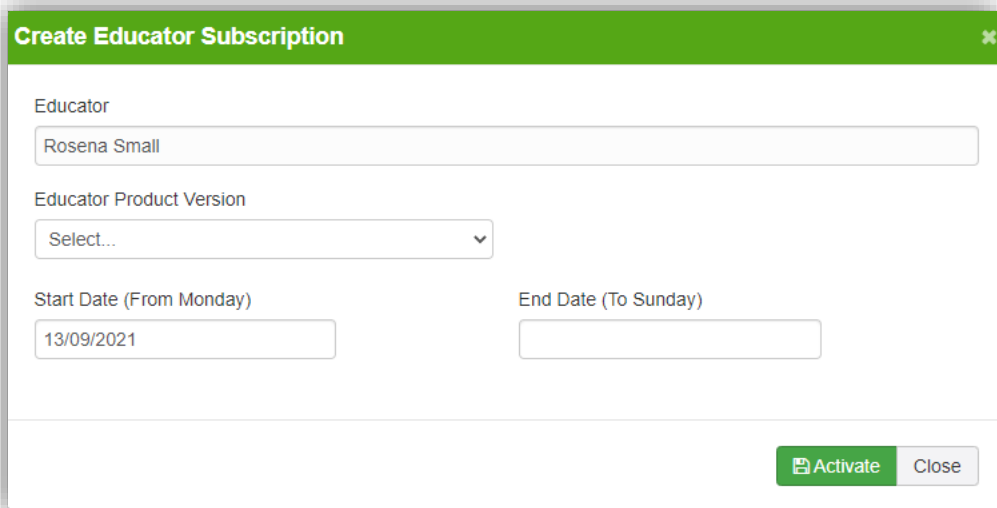
Temporary Lock Out

Subscription Details

Displaying 0 out of 0 [Create New Subscription](#)

There are no records to display

The following window will appear



Create Educator Subscription

Educator
Rosena Small

Educator Product Version
Select...

Start Date (From Monday)
13/09/2021

End Date (To Sunday)

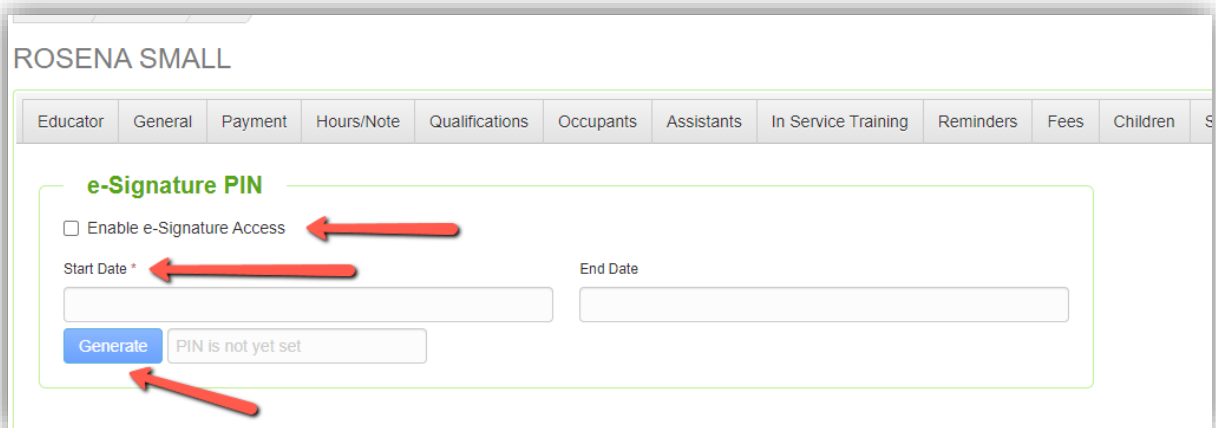
Activate Close

Enter the subscription details and select activate.

Username and password will be sent to the educator via email.

e-Signature

Educators will need to be issued an e-Signature PIN to use within their Harmony software. To do this enter in a start date and tick Enable e-Signature Access then click the Generate button.



ROSENA SMALL

Educator General Payment Hours/Note Qualifications Occupants Assistants In Service Training Reminders Fees Children

e-Signature PIN

Enable e-Signature Access

Start Date * End Date

Generate PIN is not yet set

An email will be sent to the Educator with their e-Signature PIN.

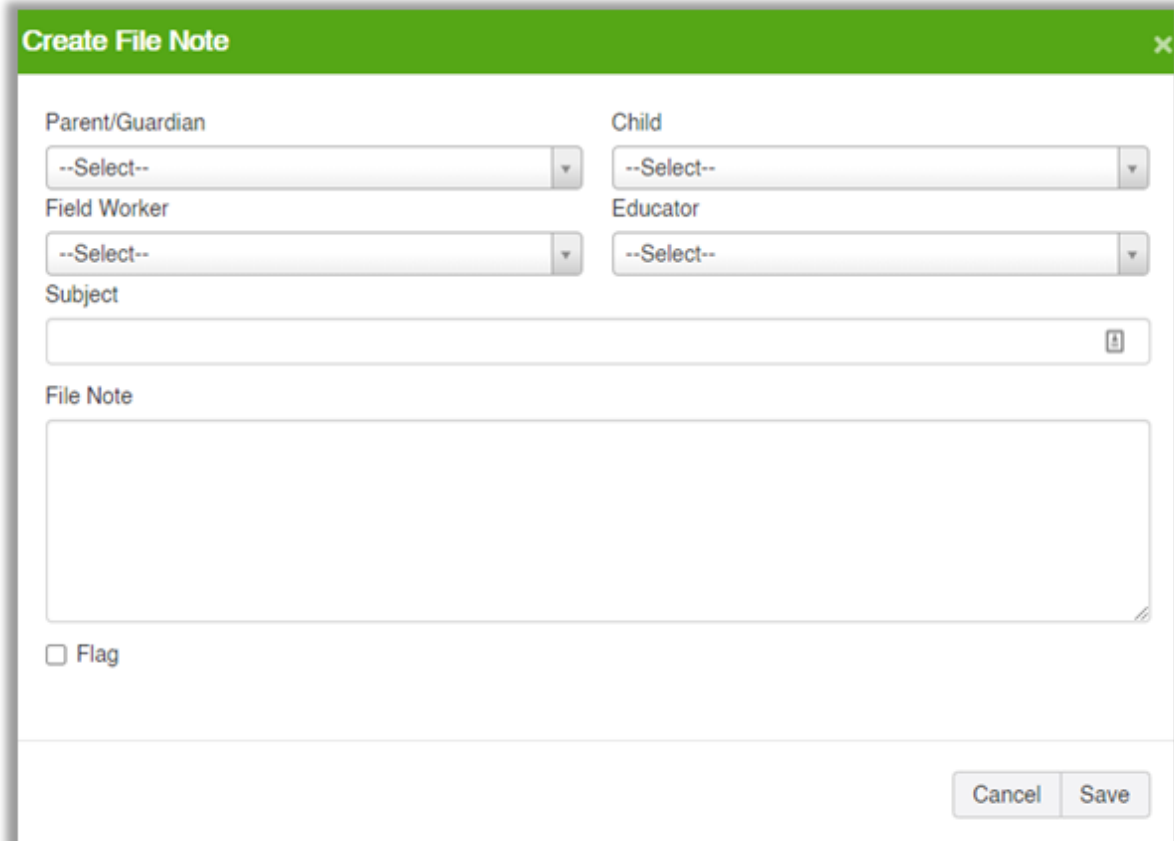
NOTE: The Educator may also generate and change their e-Signature PIN via their Harmony for Educators login.

File Notes

Any file notes relating to the Educator will display here.

Create a file note

While in each of these areas you will be able to create new file notes. To do this click on the Create New File note button and the following window will open:



Parent/Guardian: If a parent is selected only the children assigned to this parent will display in the child drop down menu.

Child: If a child is selected only the parent/guardians assigned to this child will display in the 'parent' drop down menu.

Field Worker: You may select a field worker. The list of field workers generates from your set up.

Educator: You may select an active educator the file note relates to.

Subject: Free text field to enter a brief description.

File Note: Free text field to enter more details.

Flag: You may flag notes of importance, or notes you need come back later to action.