



# The Commonwealth of Massachusetts Department of Early Education and Care

Procedure Bulletin 2018 - July

EEC Licensing Procedure  
#LPRO-18-001

Title: Using the “No Visit Needed” Field in LEAD

For use by: FCC, GSA and R&P Licensing

Effective date: July 25, 2018

Supersedes: New Procedure

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Most transactions in the Licensing Education Analytic Database (LEAD) require that a visit be linked to the transaction as part of the due diligence checklist in order to complete the particular transaction. The purpose of connecting visits to transactions is to ensure that EEC has checked for regulatory compliance regarding items related to licensing transactions.

LEAD only allows a visit to be linked to one and only one transaction. In addition, complaint investigation visits cannot be linked to transactions. As a result, in certain circumstances a licensor may not need or be able to link a visit to a transaction. Two examples are:

- An FCC provider wishes to reactivate his or her license a week following an investigation that found no regulatory non-compliances. No transaction-related visit is needed if the licensor recently visited the program for investigation activities and no changes were made to the licensed environment. Note that investigation visits cannot be linked to transactions.
- A Licensee wishes to add a classroom shortly following the issuance of a license. The licensor may have already reviewed the space during the previous visit.

There may be additional scenarios not mentioned in this procedure where a visit may not be necessary.

## How to process a No Visit Needed transaction:

<b>▼ License Information</b>	
License Requested 10	License Type Regular
Capacity To Be Granted	License Issue Date
Current Provider Capacity ?	License Expiration Date
Prof. Qualification Reg. Number	PQ Expiration Date
No Visit Needed ? <input type="checkbox"/>	No Visit Justification ?

If the licensor has determined that a transaction does not require a visit, or the completed visit is unable to be linked to the transaction, the licensor must scroll to the License Information part of the provider record and click the “No Visit Needed” checkbox. The licensor must also complete the “No Visit Justification” field:

The screenshot shows a modal dialog titled "No Visit Justification" with a close button (X) in the top right corner. The dialog contains a large, empty text area for entering justification. At the bottom of the dialog are "OK" and "Cancel" buttons. In the background, the "License Information" section of a provider record is visible. The "No Visit Needed" checkbox is checked, and the "No Visit Justification" field is highlighted, indicating it is the active field for input.

LEAD requires that the licensor note information about the decision to not require a visit. On the “No Visit Justification” screen, the licensor must note the previous visit number and describe how regulatory compliance was determined during that visit. Make sure to save.

Once completed, the due diligence checklist will automatically complete the “Visit association to this transaction” item:

Return check back to provider (if applicable) ?	Admin	Completed	7/10/2018 3:13 PM	Andrew Eppich
Review all documents ?	Licensor	Completed	7/10/2018 3:13 PM	Andrew Eppich
Visit association to this transaction ?	Licensor	Completed	7/10/2018 3:24 PM	Andrew Eppich
Review Indoor/outdoor space, safe and sufficient square footage ?	Licensor	Pending		
Reviewed Experience and Employment History ?	Licensor	Pending		