

# COPOS

Community Organization Planning & Outcome System

# Administrator Manual

<https://pa-copos.dced.pa.gov/>

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# 1. Introduction

The COPOS Administrator Manual is an extension of the COPOS User Manual, intended for the DCED System Administrator (Admin) in navigating the administrative utilities within COPOS. In order to utilize this manual effectively, first read the COPOS User Manual. Note: System Admins are not able to change any agency reporting information.

## 2. Navigation Menu

The DCED Admin left navigation menu provides access to all functionality within COPOS. The options to agency users is dependent upon their role and access is auto- or manually-assigned.

DCED Admins
Home
Alerts
COPOS Help
Questions/Comments
Announcements
Section Modification Dates
Download Reports
<a href="#">Expand All</a>
▼ Admin
▼ Report Status
▼ Organizational Standards
▼ Agency Questionnaire
▼ Work Plan / Discretionary
▼ Agency Highlights
▼ Module 2
▼ Module 3: A -Management
▼ Module 3: B
▼ Module 4: A (Quarterly)
▼ Module 4: B
▼ Module 4: C

Figure 2.1 – Left Navigation Menu

### 3. Admin

When the **Admin** option is expanded, the options available display (**Figure 3.1**). **Administration** functions serve as the primary navigation through the administrative “behind-the-scenes” utilities.

▲ Admin
Edit Users
Edit Organization & Monitor Details
Manage Board, Staff, Subcontracts
Review Work Plan Send Backs
Post Special Announcement
Active Users
Administration

Figure 3.1 – Admin Menu Options

#### 3.1 Edit Users

When a person logs into COPOS for the first time, they receive a screen to select their organization and ensure their phone number and work e-mail address are entered. After submitting the request, a confirmation screen displays (**Figure 3.2**). Until the user is approved by their Agency ED, Local Admin, or DCED System Admin, the user does not have access to COPOS. DCED System Admins are able to view a list of Users Awaiting Approval (**Figure 3.3**) after selecting the **Edit Users** link in the left navigation menu.

Your request for access to the COPOS application is being reviewed by your Agency Local Administrator, Agency Executive Director, or DCED Administrator.

You will receive an e-mail notification when the review is complete. If approved, you will be able to access COPOS by using your Keystone Login.

Thank you.  
DCED

Figure 3.2 – Initial Login Confirmation Message

Select the Agency link to display the user’s information in the New User Requests table (**Figure 3.4**).

User Management

Users Awaiting Approval				
Agency	Request Date	First Name	Last Name	E-mail Address
<a href="#">CCA</a>	10/19/2021	Linda	Test	ltest@cca.org

Agency: 

DCED Admins

Select

Users

Options	First Name	Last Name	Email Address	User Type	Last Login	Browser	Approved?	Status
---------	------------	-----------	---------------	-----------	------------	---------	-----------	--------

Figure 3.3 – Users Awaiting Approval

When the link is selected, the agency names displays and the System Admin user is now “masquerading” as a user from the agency. Selecting the **End Masquerade** button, closes the New User Requests table and displays the Users Awaiting Approval table (**Figure 3.3**).



Select the **Approve** link to approve the user, select their user role, and if the user is to receive COPOS organizational emails. Permissions for an Agency ED (there should only be 1 active ED per agency) and Local Admins are automatically given. For a User role, additional permissions are available: Report, Organizational Standard (OS), and Work Plan permissions (**Figure 3.5**). Report and OS has No Access, Read Access, and Write Access for their individual sections. The same accesses are available for the full Work Plan.

### User Management

Users Awaiting Approval				
Agency	Request Date	First Name	Last Name	E-mail Address
<a href="#">CCA</a>	10/19/2021	Linda	Test	ltest@cca.org

Agency: Center for Community Action Select End Masquerade

New User Requests					
Options	First Name	Last Name	Phone Number	Agency/Organization	E-mail Address
▲ <a href="#">Approve</a> <a href="#">Deny</a>	Linda	Test	(412) 409-8731	Center for Community Action	ltest@cca.org

Users							
Options	First Name	Last Name	Email Address	User Type	Last Login	Browser	Approved? Status

**Figure 3.4 – New User Requests – Approve-Deny**

User Report Permissions			
Part	No Access	Read Access	Write Access
Agency Highlights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 2 Expenditures, Capacity, & Resource	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 4A Individual & Family Performance Indicators (Quarterly)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 4B Individuals & Families Served	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 4C Characteristics of Those Served	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Grant Delegated Access to Submit the Full Annual Report (All Modules &amp; Re-Submissions)</b> <input type="checkbox"/>			
Note: Must have full Report Access. This will allow user to complete Overrides & Send Backs			

User OS Permissions			
Category	No Access	Read Access	Write Access
Category one: Consumer Input and Involvement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category two: Community Engagement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category three: Community Assessment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category four: Organizational Leadership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category five: Board Governance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category six: Strategic Planning	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category seven: Human Resource Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category eight: Financial Operations and Oversight	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category nine: Data and Analysis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Grant Delegated Access for this User to Sign any Organizational Standard</b> <input type="checkbox"/>			
Note: User must have full Access to All Organization Standards			

User Work Plan Permissions			
Part	No Access	Read Access	Write Access
Agency Work Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Grant Delegated Access to Submit the Agency Work Plan</b> <input type="checkbox"/>			
Note: Must have Write Access for the Delegation to Submit Work Plan			

**Figure 3.5 – User Role Permissions**

## 3.2 Agency User Delegations

Agency Executive Directors are able to delegate approval and submission capabilities to Local Admins and Users. The ED is able to do delegations for the agency Work Plan, Discretionary Request, Organizational Standard, and/or Annual Report. Except for Discretionary Requests, Users must be given Write Access permission to the associated area.

User Type	User		
Receive Organizational Emails	<input type="checkbox"/>		
Delegated Access for Submitting These Reports:			
<input type="checkbox"/> Work Plan <input type="checkbox"/> Discretionary Request <input type="checkbox"/> Organizational Standard <input type="checkbox"/> Annual Report - This includes all Modules and re-submissions in the form of Override and Send Back			
<a href="#">Edit</a>			
<b>User Report Permissions</b>			
Part	No Access	Read Access	Write Access
Agency Highlights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 2 Expenditures, Capacity, & Resource	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 4A Individual & Family Performance Indicators (Quarterly)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 4B Individuals & Families Served	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 4C Characteristics of Those Served	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check All			<input type="checkbox"/>
Grant Delegated Access to Submit the Full Annual Report (All Modules & Re-Submissions)			<input type="checkbox"/>
Note: Must have full Report Access. This will allow user to complete Overrides & Send Backs			
<b>User OS Permissions</b>			
Category	No Access	Read Access	Write Access
Category one: Consumer Input and Involvement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category two: Community Engagement	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category three: Community Assessment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category four: Organizational Leadership	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category five: Board Governance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category six: Strategic Planning	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category seven: Human Resource Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category eight: Financial Operations and Oversight	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Category nine: Data and Analysis	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Check All			<input type="checkbox"/>
Grant Delegated Access for this User to Sign any Organizational Standard			<input type="checkbox"/>
Note: User must have full Access to All Organization Standards			
<b>User Work Plan Permissions</b>			
Part	No Access	Read Access	Write Access
Agency Work Plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grant Delegated Access to Submit the Agency Work Plan			<input type="checkbox"/>
Note: Must have Write Access for the Delegation to Submit Work Plan			

Figure 3.6 – User Role Delegation Permissions

## 3.3 Edit Agency and Monitor Details Information

The **Edit Organization & Monitor Details** option allows a DCED System Admin to select an agency name to view **Organization Details**, as well as monitoring information about that agency. The Contract Number and Start/End Dates (**Figure 3.7**) are to be kept up-to-date by each agency but can be changed by a System Admin. This information is displayed when the agency completes their annual Work Plan.

Organization Type	Private CAA
Number of Board Members Established in Bylaws	15 * Public Sector: 5 * Private Sector: 5 * Low Income Sector: 5 * <small>The left box cannot be less than 15 or greater than 51. The sector boxes must sum to the value in the left box.</small>
Contract Number	C000066935 *
Contract Start/End Dates	01/01/2018 * to 12/31/2022 *

Figure 3.7 – Agency Information – Contract Data

### 3.3.1 Agency Monitoring Details

The **Edit Organization Information Monitoring Details** tab displays a table related to DCED's monitoring of the agency. Information on the **Monitoring Details** table is read only for the agency and is entered/selected by the agency's Program Specialist as the Risk Assessment & other monitoring is completed. Information from this table corresponds to the information displayed on the dashboard **All-Agency Monitoring Alert Table**. The number to be entered in the **Risk Assessed** field is based on the numbers in the **Risk Assessment Table**.

The information in the blue lines is pulled from the agency's prior reporting year's data. If any of the following are true, an On-Site monitoring is due this reporting year:

- If last monitored is within the 3<sup>rd</sup> Program Year prior, an **On-Site is due**. For example, if the current program year is 2022 and the last on-site was completed for any date in 2019 or prior (1/1/2019 to 12/31/2019 or prior to 1/1/2019), the agency is due for an on-site visit in 2022.
- If the **Risk Assessed** number is a Medium Risk (cell is yellow) or a High Risk (cell is red).
- If **Critical Issue** = "Yes".

The **Reason** displays: 3-Year, Critical Issue or Risk Assessment if an on-site monitoring is needed.

**NOTE:** Cell colors indicate to the DCED Program Specialist that this row of actions are the "next" due.

## Edit Organization Information

Agency: Blueprints Select End Masquerade

Monitoring Details
Organization Details
Monitor Letter

Monitoring Details			
Organization Name	Blueprints		Short Name Blueprints
Monitoring Due for 2022	On-Site	Reason 3-Year	
Last Monitoring & Type	2/1/2021	Type Desk	
Last On-Site Monitoring	11/7/2019		
Risk Assessment	mm/dd/yyyy	Risk Assessed	Enter a Number Critical Issue
Planned Monitoring		Scheduled Date	mm/dd/yyyy
Monitoring Completed	mm/dd/yyyy	Type	
Letter/Report Sent to Agency	mm/dd/yyyy		
Action Required			
Response Type/Received Date		mm/dd/yyyy	
Response Rejected/Date		mm/dd/yyyy	
Response Accepted	mm/dd/yyyy		

Save
Cancel

Figure 3.8 – Agency Monitoring Details Tab and Table

**Planned Monitoring:** After the agency's Risk Assessment, select the month when the monitoring is likely to be scheduled. If month is selected on February 28<sup>th</sup> of the reporting year, a reminder e-mail is sent to the assigned Program Specialist. If the date is assigned in time, a reminder e-mail is sent to the Program Specialist on the 15<sup>th</sup> of the month prior to the selected Planned Monitoring month.

**Monitoring Type:** When the **Monitoring Completed** date is entered, select the **Monitoring Type**. If it is not selected, an error displays when the **Save** button is selected and the cell displays as red. If Desk Monitoring is due and the Type selected is not = Desk, the cell displays as red.

**Letter/Report Sent to Agency:** Once populated, an e-mail notification is sent to the Agency ED and Local Admins. *Following this date until the **Response Type/Received Date** is selected*, an e-mail is sent 2 weeks, 25 days, and daily e-mails sent 30 days after the Sent to Agency date. The Program Specialist will be copied on the e-mail notification for 25 days after the Sent to Agency date and the daily e-mails (30 days after until Response Type and Received are updated).

**Response Type/Received Date:** Dropdown options are None, Letter or Corrective Action. If Type is selected that is different from the **Action Required**, a confirmation message displays. The date must be entered when the Response Type is selected; if not an error message displays when the **Save** button is selected. An e-mail is sent to the Program Specialist 21 days after the Received Date and sent daily beginning at 30 days after the date until the **Response Accepted** date is populated.

**Response Rejected/Date:** If Response Rejected = Yes, an e-mail is sent to the Agency ED and Local Admins. *Notification e-mails are sent at 2 weeks, 25 days and daily at 30 days after the Response Rejected Date, until Response Type/ Received are updated.* The cell displays as red 2 weeks after the date until the Response Type/Received Date are selected. The Program Specialist will receive the notification e-mail at 25 days after the date and sent daily at 30 days after the date until the Response Type and Received are updated.

### ***3.4 Manage Board, Key Staff, Subcontracts***

The **Manage Board, Key Staff, Subcontracts** option allows a DCED System Admin to select an agency name to view the agency's Board and Key Staff information, and a list of CSBG-funded subcontractors used (if any) by the agency.

#### ***3.4.1 Board Management***

The Board Management tab displays the agency's Board Vacancy History for the current and previous 11 months, and the list of Public, Private, and Low-Income Board members (**Figure 3.9**). If there are members from a sector missing based on the agency's bylaw numbers, the missing number displays in the appropriate month (**Figure 3.10**).

Agency: DCED Admins Select

Board Management
Key Staff Management
Subcontractor Management

Number Of Board Members Established in bylaws: 18  
Current Number of Board Members 0

Sector: 
☒ All Sectors
☐ Public Sector
☐ Private Sector
☐ Low Income Sector

This view is a read-only summary. To make changes, select a board sector above.

Board Vacancy History												
Sector	Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	Oct 2021
Public Sector Board Members												
Private Sector Board Members												
Low Income Sector Board Members												
All Sectors												

Public Official Board Members

First Name	Last Name	Board Position
No Board Members		

Private Sector Board Members

First Name	Last Name	Board Position
No Board Members		

Low Income Board Members

First Name	Last Name	Board Position
No Board Members		

**Figure 3.9 – Manage Board, Key Staff, Subcontracts – Board Management**

Board Vacancy History												
Sector	Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021	Oct 2021
Public Sector Board Members			2	2	2	2	2					
Private Sector Board Members			1	1	1	1	1					
Low Income Sector Board Members												
All Sectors			3	3	3	3	3					

**Figure 3.10 – Board Vacancy History Example**

### 3.4.2 Subcontractors

The Subcontractor Management tab displays a list of subcontractors used by an agency for CSBG-funded work. This information, if entered, is displayed in the Subcontractor section of the agency's Work Plan (**Figure 3.12**).

Board Management
Key Staff Management
Subcontractor Management

Subcontractors

Name	Services/Programs Provided
<a href="#" style="color: blue; text-decoration: underline;">Select</a>	Testing Contractor
	Testing Services

[View Deleted](#)

**Figure 3.11 – Manage Board, Key Staff, Subcontracts – Subcontractor Management**

<a href="#">View Organization Allocations</a>   <a href="#">Instructions</a>		
Subcontractor Name	Contract Amount	Services/Programs Provided
Testing Contractor	\$ 2566	Testing Services
<b>TOTAL:</b>	\$ 2566	

Figure 3.12 – Work Plan Subcontractors

### 3.5 Active Users

The **Active Users** option displays a list of users currently logged into COPOS as well as their login time, agency name, phone number with extension, and current page.

**Note:** Users who do not logout by selecting the Logout link in the Header Panel may be displayed as logged in on the Active Users page until their session times out.

Active Users				
Username	Login Time	Agency Name	Phone Number	Current Page
Jake Smith	10/19/2021 1:33:31 PM	DCED Admins	(814) 938-3302 Ext. 227	Admin

Figure 3.13 – Active Users

### 3.6 Review Agency Overrides

DCED System Admins are able to review “regular” and “send back” overrides by selecting the **Review Agency Overrides** option in the left navigation menu. Agencies submitting an override request display in the dropdown list **Figure 3.13**). **Note:** Agencies have the ability to submit an override that has no changes – the override is for the late submission of their Annual Report.

▲ Admin
Edit Users
Edit Organization & Monitor Details
Manage Board, Staff, Subcontracts
Begin an Override
Review Agency Overrides

Figure 3.14 – Review Agency Overrides Menu Option

A DCED Note displays if the override change was completed due to a Send Back. Select the Item/Area link to display the reporting section. The Justification box displays the comment entered by the agency prior to submitting the override to DCED. A DCED Response Message must be entered prior to selecting the **Approve** button or the **Send Back** button.

[Review Approved Overrides](#)

## COPOS 2021 Override Requests

The following Agencies have an active override for COPOS 2021  
 Agency for Community EmPOWERment of NEPA [Review Send Back](#)  
 Bucks County Opportunity Council, Inc. [Review Send Back](#)  
 Commission on Economic Opportunity [Review Send Back](#)  
 Community Action Committee of the Lehigh Valley, Inc. [Review Send Back](#)  
 Union-Snyder Community Action Agency [Review Send Back](#)

Agencies with submitted override requests Carbon County Action Committee for Human Services ▼

### Request Information

#	Module	Item / Area	DCED Note / Agency Change
1	Module 4: A (Quarterly)	<a href="#">FNPI 4h The number of individuals with improved energy efficiency and/or energy burden reduction in their homes.</a>	update numbers
		Third Quarter - Total Participants Enrolled in Program(s)	0 → 56
		Third Quarter - Total Participants Achieving Outcome	0 → 44
2	Module 4: A (Quarterly)	<a href="#">FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.</a>	
		Third Quarter - Total Participants Enrolled in Program(s)	0 → 5
		Third Quarter - Total Participants Achieving Outcome	0 → 5
3	Module 4: A (Quarterly)	<a href="#">FNPI 1b The number of unemployed adults who obtained employment (up to a living wage).</a>	
		Third Quarter - Total Participants Enrolled in Program(s)	0 → 10
		Third Quarter - Total Participants Achieving Outcome	0 → 3

**Justification**

Numbers have been updated as requested.

### Approve/Send Back Request

Override Request Response Message

**Figure 3.15 – Review Override Requests – Approve-Send Back**

When an override is approved, the agency displays in the table on the **Approved Overrides** screen. The number of approved overrides and the number of items changed displays. Select the **View Changes** link to display the agency's override information (as shown in **Figure 3.14**).

[Review Override Requests](#)

## COPOS 2021 Approved Overrides

Override Summary			
Agency	# Requests Approved	# Values Changed	
Agency for Community EmPOWERment of NEPA	1	10	<a href="#">View Changes</a>
Armstrong County Community Action Agency	1	0	<a href="#">View Changes</a>
Blueprints	1	1	<a href="#">View Changes</a>
Carbon County Action Committee for Human Services	2	7	<a href="#">View Changes</a>
Center for Community Action	1	13	<a href="#">View Changes</a>

**Figure 3.16 – Approved Overrides**





## 4 Administration – Report Management

Each function is grouped by related functionality onto a tab as shown in **Figure 4.1**. System Administrators have access to a limited number of functions denoted by an asterisk (\*) are only available to System Administrators with “Promoted Roles”.

### COPOS Administration

\* Promoted Roles Only Link

Report Management
Management Utilities
Report Utilities
Organizational Standards
Transaction Logs
Maintenance
Misc

[Auto-Complete Management\\*](#)  
[Content Management - Annual Report\\*](#)  
[Content Management - Work Plan\\*](#)  
[Edit Annual Report Details\\*](#)  
[Edit Monitor Details\\*](#)  
[Edit Work Plan Allocations\\*](#)  
[Migrate Report Content\\*](#)  
[Manage Validation Rules\\*](#)  
[Yellow Block Management\\*](#)

Unlock Administrative Changes

By clicking the 'Unlock Administrative Changes' button, the report will be hidden from all users.

**Figure 4.1 – COPOS Administration Page – Report Management Tab**

### 4.1 Auto-Complete Management

This is a function for Promoted System Admins. It allows entering rules for automatically completing questions based on other questions' answers. Each annual report section is available in the **Select Section** dropdown list (**Figure 4.2**). If the selected section does not have auto-complete related functionality, no information displays in the table.

The Left Group determines the question/heading that is to be automatically completed. The Right Group determines the questions/headings used to calculate the value. The Right Group Operator displays the mathematical operator (+, -, or /) that is used in the calculation of the section's question.

Required changes to any section, must be completed by a request to the Information Technology (IT) Development team. COPOS Promoted Admins are able to remove a section calculation by selecting the associated **Delete** link.

### Auto-Complete Management

Select Section: Module 4: A (Quarterly) - FNPI 1 - Employment

Auto-Completes for Selected Section						
Section	Left Group		=	Right Group		Right Group Operator
<a href="#">Delete</a> Module 4: A (Quarterly) - FNPI 1 - Employment	Question	Heading	=	Question	Heading	/
		Percentage Achieving Outcome in Reporting Period <b>4th Quarter Total / Participants Enrolled = % Achieving</b>			Total Participants Achieving Outcome	
<a href="#">Delete</a> Module 4: A (Quarterly) - FNPI 1 - Employment	Question	Heading	=	Question	Heading	-
		Number of <u>New</u> Participants Enrolled in Program(s) This Quarter			Total Participants Enrolled in Program(s)	
					Number of Participants Enrolled in Program(s)	

**Figure 4.2 – Auto-Complete Management Example**

After creating auto-complete rules, they are displayed in the tables at the bottom of the page (**Figure 4.3**). There are two tables – one for Heading Auto-Complete Rules and one for Question Auto-Complete Rules. All existing rules for the currently selected report appear in these tables.

The tables have the same layout, displaying details of the rule such as section, group items, and mathematical operators. They also have buttons for deleting the rules or moving them up or down in priority.

Current Heading Auto-Completes					
Subsection	Left Group	Middle Operator	Right Group	Right Group Operator	
<a href="#">Delete</a> Section A: Employment Indicators	Percentage Achieving Outcome in Reporting Period <b>4th Quarter Total / Participants Enrolled= % Achieving</b>	Fourth Quarter <=	Total Participants Achieving Outcome Total Participants Enrolled in Program(s)	Fourth Quarter / Fourth Quarter	<input type="button" value="^"/> <input type="button" value="v"/>

**Figure 4.3 – Auto-Complete Heading Table**

## 4.2 Content Management – Annual Report

This is an option for Promoted System Admins to allow editing the content of the selected COPOS Report. If the selected report year's content is locked, a message displays in red at the top of the page stating changes cannot be made (**Figure 4.4**). Many controls on the page are hidden until the report content is unlocked. Report content can be unlocked using the [Unlock Administrative Changes](#) button on the Administration Report Management tab.

**Note:** It is best to consult with IT Development prior to making any change to ensure report accuracy and some changes may need to be made by IT Development.

To change content when the report is not locked, select the appropriate Edit link. A pop-up box displays the where full name and link text can be entered (**Figure 4.5**).

Manage Report Content			
The selected report is locked and cannot be changed.			
Agency Highlights <a href="#">Edit</a>   <a href="#">Delete</a> ^ v			
Section Name	Section Type	Actions	Change Order
Delivering Services	Narrative	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View Questions/Headings</a>	^ v
Mobilizing Resources	Narrative	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View Questions/Headings</a>	^ v
Analytic Approaches	Narrative	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View Questions/Headings</a>	^
Module 2 <a href="#">Edit</a>   <a href="#">Delete</a> ^ v			
Section Name	Section Type	Actions	Change Order
Section A: A.2.	Matrix	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View Questions/Headings</a>	^

**Figure 4.4 – Content Management – Annual Report**

### Edit Section

Text:

Name:

Link Name:

SectionType:

Help Text: 

Agency Highlights calls for narrative descriptions that provide a human face to the facts and figures reported elsewhere in this Annual Report. It is this section that provides a framework for understanding how CSBG works to improve the lives of low-income families and communities. The Agency Highlights consist of three categories. The first category, Delivering Services focuses on management and program accomplishments and asks the agency to showcase the three primary Management

CommentsXMLTagName:

### Edit Section

Text:

Name:

Link Name:

SectionType:

Help Text: 

<p>All Individual and Family NPIs are<strong><u>optional</u></strong>&nbsp;there is a category for "Other Outcome Indicator". CSBG Eligible Entities will only report an "Other Outcome Indicator" if the current NPIs do not capture the outcomes the CSBG eligible entity is trying to achieve. Sample language is provided in the &#8220;Other Outcome Indicator&#8221; data entry section and will be modified by the CSBG Eligible Entity as necessary.</p><p><br /></p><div>

CommentsXMLTagName:

**Figure 4.5 – Edit Annual Report Section Examples**

If a full section or part of a section of the Annual Report is not needed, selected the appropriate **Delete** link. Note: Deleting a full section also deletes the associated sections and questions.

Select the **View Questions/Headings** link to view the section Headings and Questions **Figure 4.6)**. Each area can be edited or deleted (**Figures 4.7 and 4.8**). **Note:** It is best to consult with IT Development prior to making any change to ensure report accuracy and some changes may need to be made by IT Development.

If a part of the Heading and/or Question needs to be in a different order when displayed, use the **Change Order** up and down arrows to move to the appropriate order of display.

Section Name		Section Type	Actions				Change Order	
Section A: A.2.		Matrix	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">View Questions/Headings</a>				▼	
'Section A: A.2.' Headings								
Heading Text	Question Type	Answer Type	Max Length	Heading Type (Module 4:A only)	# of Questions	Actions	Change Order	
CSBG Funds	Fourth	Integer	0		12	<a href="#">Edit</a>   <a href="#">Delete</a>	▼	
Percent Admin Costs	Fourth	Percent	0		1	<a href="#">Edit</a>   <a href="#">Delete</a>	^	
'Section A: A.2.' Questions								
Question Text				Short Text	Other Indicator	# of Headings	Actions	Change Order
A.2a. Employment				A.2a.	No	1	<a href="#">Edit</a>   <a href="#">Delete</a>	▼
A.2b. Education and Cognitive Development				A.2b.	No	1	<a href="#">Edit</a>   <a href="#">Delete</a>	^ ▼

**Figure 4.6 – View Questions/Headings – Edit - Delete - Change Order**

### Edit Heading

Text:

Question Type:

AnswerType:

Help Text:

CFDA: ☐

Max Length:

HeadingType (Module 4:A only):

Questions:

- ☒ A.2a. Employment
- ☒ A.2b. Education and Cognitive Development
- ☒ A.2c. Income, Infrastructure, and Asset Building
- ☒ A.2d. Housing
- ☒ A.2e. Health and Social/Behavioral Development *(Includes Nutrition)*
- ☒ A.2f. Civic Engagement and Community Involvement
- ☒ A.2g. Services Supporting Multiple Domains
- ☒ A.2h. Linkages *(e.g. partnerships that support multiple domains)*
- ☒ A.2i. Asset Building *(detailed in Section 4.4)*

**Figure 4.7 – Edit Section Heading**

### Edit Question

Text:

ShortText:

Other: ☐

Help Text:

XML Tag Name:

Special XML: ☐

Requires Living Wage Definition: ☐

Headings:

- ☒ CSBG Funds (Fourth Quarter)
- ☐ Percent Admin Costs (Fourth Quarter)

**Figure 4.8 – Edit Section Question**

### 4.3 Edit Annual Report Details

Promoted System Admins are able to select a report year to edit due dates, end, start, and lock dates, lock the report for NASCSP reporting, run scripts, and simulate a report quarter using **Edit Annual Report Details (Figure 4.9)**. **Note:** Many features throughout COPOS use these dates for calculations and the ability to enter or not enter report information.

The **CSBG Grant Number** is used for export processes and must be set before exporting data. The **Run Scripts** checkbox allows the daily and monthly scripts to run for the selected report. When **Lock for Reporting to NASCSP** is selected, data changes are prevented for the report year. Used for testing purposes, the **Simulate xxxx Quarter** links change the Quarter Report Lock Dates so the current date is in the selected quarter.

Each report quarter has an End Date and a Lock Date. The End Date is when the quarter actually ends and reporting should begin. The Lock Date is when reporting for the quarter is locked in COPOS and the next quarter opens.

### Edit Report Details

Select Report: COPOS 2022 ▼  
[Create New Report](#)

#### Monitoring Information

Agency Questionnaire Due Date:

#### Work Plan Information

Work Plan Due Date:

#### Discretionary Details

Lock to Prevent Agencies from Adding New Discretionary Requests ☐

#### Report Information

Report Name:	<input type="text" value="COPOS 2022"/>
Report Start Date:	<input type="text" value="01/01/2022 12:00 AM"/>
Federal Fiscal Year Start Date:	<input type="text" value="10/01/2021 12:01 AM"/>
Federal Fiscal Year End Date:	<input type="text" value="09/30/2022 11:59 PM"/>
Report End Date:	<input type="text" value="12/31/2022 11:59 PM"/>
CSBG Grant Number:	<input type="text"/>
Run Scripts:	<input type="checkbox"/>
Lock For Reporting To NASCSP -Prevents agencies from beginning overrides -Prevents the 'Do Not Report' field from being set for Initiatives -Allows running Export Utilities (XML/Smartforms)	<input type="checkbox"/>

Clicking one of the below links will set the lock date textboxes to dates that will make the system see today's date as being the corresponding quarter. (You must click 'Save Report Details' to save these dates and you must log out and log back in for your current Session to update)

[Simulate Target Quarter](#)  
[Simulate First Quarter](#)  
[Simulate Second Quarter](#)  
[Simulate Third Quarter](#)  
[Simulate Fourth Quarter](#)  
[Restore Default Dates](#)

Quarter Dates		
Quarter	End Date	Report Lock Date
Target	<input type="text" value="03/31/2022 11:59 PM"/>	<input type="text" value="02/14/2022 11:59 PM"/>
First Quarter	<input type="text" value="03/31/2022 11:59 PM"/>	<input type="text" value="04/30/2022 11:59 PM"/>
Second Quarter	<input type="text" value="06/30/2022 11:59 PM"/>	<input type="text" value="07/30/2022 11:59 PM"/>
Third Quarter	<input type="text" value="09/30/2022 11:59 PM"/>	<input type="text" value="10/30/2022 11:59 PM"/>
Fourth Quarter	<input type="text" value="12/31/2021 11:59 PM"/>	<input type="text" value="02/14/2022 11:59 PM"/>

Save Report Details

Figure 4.9 – Edit Report Details

#### 4.4 Edit Monitor Details – Risk Assessment

For each reporting year, Promoted System Admins are able to update the **Risk Assessment Table** with From and To values to indicate the risk value assigned following a Program Specialist's monitoring of an agency. The value is entered on the Monitor Details table – based on the number entered, the cell will display with the associated color shown in **Figure 4.10** (i.e. enter 57 – cell color is green).

Risk Assessment Table		
2022	From	To
Risk Range	0	999
Low	0	49
Medium	50	99
High	100	999
<input type="button" value="Save"/>		

Figure 4.10 – Risk Assessment Table

#### 4.5 Edit Work Plan Allocations

For a selected report year, Promoted System Admins are able to enter a CSBG funding allocation and enter the allocated amount for each agency. There must be at least 1 allocation prior to the agencies being able to complete their Work Plan. Selecting the **Insert Allocation** link displays a pop-up box (**Figure 4.12**) to enter the allocation Title and full dollar amount (in whole dollars). When the **Save** button is selected, a column is created showing the title, allocation amount, and entry box for each agency to enter their designated allocation (**Figure 4.11**).

Work Plan Agency Allocations		
<input type="button" value="Save"/>		
Funding For 2022: <input type="text" value="7,000,059"/>		
<a href="#">Insert Allocation</a> <input type="text" value="2022 Q1"/>		
Agency	1st Allocation	Total
Agency for Community EmPOWERment of NEPA	\$ <input type="text" value="125,437"/>	\$125437
Allegheny County Department of Human Services	\$ <input type="text" value="296,886"/>	\$296886
Armstrong County Community Action Agency	\$ <input type="text" value="62,500"/>	\$62500
Berks Community Action Program, Inc.	\$ <input type="text" value="225,744"/>	\$225744
Blair County Community Action Program	\$ <input type="text" value="72,243"/>	\$72243
Blueprints	\$ <input type="text" value="118,694"/>	\$118694
Bucks County Opportunity Council, Inc.	\$ <input type="text" value="211,902"/>	\$211902
Carbon County Action Committee for Human Services	\$ <input type="text" value="62,500"/>	\$62500
Center for Community Action	\$ <input type="text" value="107,259"/>	\$107259
Central Pennsylvania Community Action, Inc.	\$ <input type="text" value="129,972"/>	\$129972
Central Susquehanna Opportunity Council, Inc.	\$ <input type="text" value="104,430"/>	\$104430

Figure 4.11 – Work Plan Allocations Example

### Insert Allocation

Title:

Amount:

Figure 4.12 – Insert Allocation Pop-Up Box

## 4.6 Migrate Report Content

Promoted System Admins (*and preferably IT Development*) have options for copying data from 1 report year to the next. **NOTE:** It is highly recommended to have IT Development create a database backup before using any function on this page. The migration must be completed prior to making the next report available to users.

**Migrate Report Content** copies the selected report sections from the previous report into the next year's report. This includes all headings, questions, sections, and parts. Each copied item is tied to the "copied from" report with a "Previous Report" field. For the 2023 report, the agency Work Plan will display to select for migration.

Check the parts you would like to migrate from COPOS 2019 To COPOS 2020.

☐ Agency Highlights  
☐ Module 2  
☐ Module 3  
☐ Module 4: A (Quarterly)  
☐ Module 4: B  
☐ Module 4: C

Migrate Selected Parts

WARNING: By Clicking the button above, you will create a copy of the selected sections and add them to the current report. This will also copy all subsections, headings, questions, help content, auto-complete, yellow blocks and validation related to the selected section. Running this script multiple times will result in duplicate sections.

NOTE: When migrating from 2018 to 2019 specifically, this script will also generate yty maps for all 4th quarter integer headings. (For module 4A the 'total acheiving' 4th quarter heading has a yty map generated)

Figure 4.13 – Migrate Report Content

**Migrate Additional Indicator Answers** provides the capability to copy each agency's additional indicator text answers from the previous report year. It does not copy the numeric answers for the fields. Selecting the checkbox only copy answers for sections that are only for 4<sup>th</sup> Quarter.

**Migrate Additional Indicator Answers**

☐ Only Migrate Additional Indicator Answers for Non-Quarterly sections (sections without target quarter headings)

Migrate Additional Indicator Answers

Running this script will migrate answers from COPOS 2021 to COPOS 2022 for question/headings where answer type is 'text', question type is 'none', and the question has a 4th quarter heading.

Figure 4.14 – Migrate Additional Indicator Answers

**Migrate User Permissions** copies the access permissions for the selected report part(s) from the previous report into the next year's report.

**Migrate User Permissions**

Migrate Permissions for all users From COPOS 2021 to COPOS 2022

Migrate User Permissions

Running this script will copy user permissions from COPOS 2021 to COPOS 2022. This script can be ran multiple times without issue.

Figure 4.15 – Migrate User Permissions

**Migrate Initiatives** copies Initiative data from the previous report year to the next report year. The Agency dropdown list allows migrating initiatives for a single agency or all agencies at once. Initiative data for questions 1 - 11 are copied and associated with the next report year. The Initiative is not copied but a reference to the Initiative ID is created in the required database tables.

**Migrate Initiatives**

The following initiatives do not have a status selected for COPOS 2020:  
Community Level Initiatives will be migrated from: COPOS 2020 to COPOS 2021.

Migrate Initiatives

Running this script will delete all COPOS 2021 Initiative data for Questions #1-#11 for all Active Initiatives. It then inserts initiative data for the COPOS 2021 Report. This script will overwrite all Question #1-#11 data for Active Initiatives (Can be ran multiple times without issue)



Figure 4.16 – Migrate Initiatives

**Migrate Module 3 Tag Names** copies the XML Tag Name field (used for Module 3 exports) from the previous report to the next year's report. This provides a good starting point for comparison with the Smart Forms or XML files provided by OCS. Tag names may need to be adjusted after migration depending on the files provided.

### Migrate Module 3 Tag Names

Click the button to migrate Module 3 indicator and strategy Smart Form export tag names from COPOS 2020 to COPOS 2021. Tag names should be verified before exporting and manually updated in the database if there are changes.

Figure 4.17 – Migrate Module 3 Tag Names

## 4.7 Manage Validation Rules

This option is used by IT Development to help create validation rules. Each Validation Rule is used to validate agency data entered into the COPOS Report and consists of “left” and “right” groups that are compared to determine answer validity. **Note:** Promoted System Admins are able to delete a rule by selecting the rule's **Delete** link. This should be done after IT Development consultation to fully understand the impacts on reporting data validity.

If a new validation rule is required, work with IT Development to define and create it.

Validation Rule is required, Work Item is not. Development is done and create it.

Select Section: <div>Module 2 - Section C</div>						
Validation Rules for Selected Section						
Error Message	Severity	Left Group		Operator	Right Group	
<a href="#">Delete</a>	Fatal	Operator:		<=	Operator:	
		Question	Heading		Question	Heading
		C.4q. If any of these resources were also reported under Item C.3n. (Federal Resources), please estimate the amount.			C.3n. TOTAL: NON-CSBG FEDERAL RESOURCES Allocated (autocalculated)	
<a href="#">Delete</a>	Fatal	Operator:		<=	Operator: +	
		Question	Heading		Question	Heading
		C.5f. If any of these resources were also reported under item C.3n. or C.4p. (Federal or State Resources), please estimate the amount.			C.3n. TOTAL: NON-CSBG FEDERAL RESOURCES Allocated (autocalculated)	
					C.4p. TOTAL: STATE RESOURCES Allocated (autocalculated)	

Figure 4.18 – Manage Validation Rules

### 4.7.1 Error Message and Severity

If the data is in error based upon the rule, the associated error message displays. The severity level impacts whether or not the agency's report can be submitted.

**Fatal:** Data must be fixed. Report cannot be submitted.

**Informational:** Suggestion to fix the data. Report can be submitted.

**Required Note:** Entry of an Additional Details Note is required or change the data if incorrect. Report cannot be submitted.

### 4.7.2 Groups and Operator

The Left and Right groups consist of group items comprised of a report section Question Heading. Each group item indicates a question/heading combination in conjunction with the Operator used to check the validation rule.



In most cases, the Left group only contains a single group item, being the question/heading to validate. The Right group consists of one or a group items to be combined according to the arithmetic operator and compared to the left group value.

### 4.8 Yellow Block Management

This option (**Figure 4.18**) is used by IT Development to help validate data, create a validation warning, and to cause a cell to be highlighted in yellow to indicate an error. Values are validated against a single Question/Heading combination. When an error is indicated, an Additional Details Note is required to be entered. Once a note is entered, the cell is no longer highlighted in yellow. **Note:** Promoted System Admins are able to delete a rule by selecting the rule's **Delete** link. This should be done after IT Development consultation to fully understand the impacts on reporting data validity.

If a new validation rule is required, work with IT Development to define and create it.

Select Section: <span>Module 2 - Section C</span>					
Validation Rules for Selected Section					
Error Message	Severity	Left Group		Operator	Right Group
<a href="#">Delete</a>	Fatal	Operator:		<=	Operator:
		Question	Heading		QuestionHeading
The amount in C.4q cannot be greater than the Total reported in C.3n		C.4q. If any of these resources were also reported under Item C.3n. (Federal Resources), please estimate the amount.			C.3n. TOTAL: NON-CSBG FEDERAL RESOURCES Allocated (autocalculated)
<a href="#">Delete</a>	Fatal	Operator:		<=	Operator: +
		Question	Heading		QuestionHeading
This amount cannot be greater than the Total of the amounts in C.3n and C.4p		C.5f. If any of these resources were also reported under item C.3n. or C.4p. (Federal or State Resources), please estimate the amount.			C.3n. TOTAL: NON-CSBG FEDERAL RESOURCES Allocated (autocalculated)
					C.4p. TOTAL: STATE RESOURCES Allocated (autocalculated)

Figure 4.19 – Manage Yellow Block Validation

### 4.9 Unlock Administrative Changes

The **Unlock Administrative Changes** button is used by System Admins to lock and unlock various Administrator utilities. This prevents report changes while users are in the system and accidental changes while reviewing current report content.

When a report is locked for Administrative changes, users will see it in the Select Report dropdown. If it is locked, System Admins will see it in the dropdown list (it will not be automatically selected for System Administrators, but they can select it).

Unlock Administrative Changes

By clicking the 'Unlock Administrative Changes' button, the report will be hidden from all users.

Figure 4.20 – Unlock Administrative Changes

## 5 Administration – Management Utilities

Each function is grouped by related functionality onto the tab as shown in **Figure 5.1**. System Administrators have access to a limited number of functions as functions denoted by an asterisk (\*) are only available to Promoted System Administrators.



Figure 5.1 – Administration – Management Utilities Options

### 5.1 Active Users

The Active Users page displays a list of users currently logged into COPOS as well as their login date and time, agency name, phone number with extension, login time, and current page.

Active Users				
Username	Login Time	Agency Name	Phone Number	Current Page
Melanie Sheeler	10/20/2021 11:28:19 AM	DCED Admins	(717) 409-3828	Admin

Figure 5.2 – Active Users

### 5.2 Administrative Email Listing

Selecting the **Administrative Email Listing** link displays a list of System Admins who receive administrative system emails such as scheduled monthly emails. Use **Edit Users** for DCED Admins to select the user, edit their details, and select the **Receive Administrative Emails** checkbox to receive or to not receive the emails.

Administrative Email Listing	
Users Recieving Administrative Emails	
Janelle Bischof	
Melanie Sheeler	
Melissa Tabb	
John Winters	

Figure 5.3 – Administrative Email Listing Page

### 5.3 COPOS Help Management

Help Management provides Promoted System Admins the capability to add and edit **COPOS Help** headers and their underlying content. Choose a **Header Text Select** link to display all of the current help items for the Help topic area (**Figure 5.4**).

## COPOS Help Management

This page is used to manage the resources found under 'COPOS Help'

Help Link Types	
<a href="#">Select</a> <a href="#">Select</a> <a href="#">Select</a> <a href="#">Select</a> <a href="#">Select</a> <a href="#">Select</a>	<b>Header Text</b> COPOS Resources CSBG AR All Resources CSBG AR Module 2 Resources CSBG AR Module 3 Resources CSBG AR Module 4 Resources NASCSP / ROMA Resources Organizational Standards Resources <div style="margin-top: 10px;"> <input type="text"/> </div>
<input type="button" value="Add New"/>	<input type="text"/>

**Figure 5.4– Help Management**

Select the existing help item link (**Figure 5.5**) to display its details (**Figure 5.6**). The Link Text and Type can be changed, the item can be moved to a different topic area by selecting a different **Help Link Type**, the item can be archived, a different document can be uploaded, or the item can be deleted.

Select the **Add New** button to add a new Help information for the topic area.

Header Text <input type="text" value="CSBG AR Module 4 Resour"/>			<input type="button" value="Update"/>
Help Link Text	Date Created	Last Modified	
<input type="button" value="Add New"/>			
<a href="#">Module 4 Excel Document</a>		2018-04-25T16:14:54.207	
<a href="#">Module 4 FNPI &amp; SVR Numbering Scheme</a>		2020-04-22T11:35:30.057	
<a href="#">Module 4 Instruction Manual - Version 2</a>		2019-01-14T14:40:38.58	

**Figure 5.5 – Help Management Topic Items**

**Help Link Details**

Link Text:   
Help Link Type:   
Link Type:   
Archived:   
Destination:  No file chosen  

helpDocuments\Module 4 Excel Document.xlsx

**Figure 5.6 – Help Management Help Link Details**

## 5.4 Email All Users – COPOS Blast

System Administrators are able to send a “COPOS Blast” email to active COPOS users by role(s) or to all users (**Figure 5.7**). The functionality works similar to Microsoft Outlook and document uploading apps. A test email can be sent to one or more specific users by enter the email address(es) in the **Send Test** Email entry box.

To attach multiple file when selecting the **Choose Files** button, use Ctrl click on each file name or Shift click on a series of file names.

## Email All Users

Subject:

✂ 📄 📁 📧 📧 ↶ ↷ 🔗 🔗 🚩 🖼 📊 ☰ Ω 🔗 📄 Source

**B** **I** **S** **I<sub>x</sub>** | ☰ ☰ ☰ ☰ | ☰ ☰ | ☰ ☰ | ☰ ☰ | ☰ ☰ | Styles | Format | ?

Body:

Send To: ☒ Executive Directors ☒ Local Administrators ☒ System Administrators ☒ Aggregate Users  
☒ Users

Attachment: Choose Files No file chosen

Send Test Email   
Send to All Users

Figure 5.7 – Email All Users

## 5.5 Map Year-To-Year Data

The **Map Year-To-Year Data** option provides the capability for IT Development to create connections between 2 points of data from different COPOS report years. **Year-to-Year Variance** is calculated using these connections and requires an Additional Details Note when the values are outside of the specified range.

**Note:** Promoted System Admins are able to delete a rule by selecting the rule's **Delete** link. This should be done after IT Development consultation to fully understand the impacts on reporting data validity.

If a new Year-to-Year mapping is required, work with IT Development to define and create it.

Year-To-Year Management									
Select Section: <span>Module 2 - Section A: A.2.</span>									
Year To Year Maps for Selected Section									
Last Question	This Question	Last Heading	This Heading	Last ReportId	This ReportId	Lower Variance	Upper Variance	Requires Note	
<a href="#">Delete</a> A.3. Of the CSBG funds reported above, report the total amount used for Administration. (For more information on what qualifies as Administration, refer to <a href="#">IM37</a> )	A.3. Of the CSBG funds reported above, report the total amount used for Administration. (For more information on what qualifies as Administration, refer to <a href="#">IM37</a> )	CSBG Funds	CSBG Funds	15	17	50.00	200.00	Yes	
<a href="#">Delete</a> A.2k. Total CSBG Expenditures (auto calculated)	A.2k. Total CSBG Expenditures (auto calculated)	CSBG Funds	CSBG Funds	15	17	50.00	200.00	Yes	
<a href="#">Delete</a> A.2j. Other (e.g. emergency management/disaster relief)	A.2j. Other (e.g. emergency management/disaster relief)	CSBG Funds	CSBG Funds	15	17	50.00	200.00	Yes	

Figure 5.8 – Map Year-To-Year Data

## 5.6 Questions/Comments Log

The **Questions/Comments Log** documents information submitted by COPOS users through the Questions/Comments function. System Admins are able to view Resolved and Un-Resolved items. To enter a note related to

the Q/C, enter information in the **Add Notes** entry box then select the **Add Notes** button. The information entered displays under “Notes:”.

Questions/Comments Log

Select: Resolved

1

2

3

4

5

6

7

8

9

10

11

12

13

14

Ticket #: 770

Resolved: ☒ 02/26/2020

Created: tcherry45 on02/17/2020

Subject: Suggestion/Comment

Explanation: Received message that Target numbers were not submitted by due date 2/14/20 but they are already in COPOS. They were due in December.

Notes:

Melanie sent clarification.

Add Notes

Ticket #: 771

Resolved: ☒ 02/26/2020

Figure 5.9 – Questions/Comments Log - Resolved

To designate a Q/C item as resolved, select the **Resolved** box. The item will be viewable in the Resolved list.

Questions/Comments Log

Select: Un-Resolved

Ticket #: 774

Resolved: ☐

Created: b-rrainey on04/01/2020

Subject: Other

Explanation: Our Executive Director, Kenneth Heilman has retired as of March 31, 2020. Our new ED is Janine Kennedy, 724-545-3635, janinek@armstrongcap.com. We would like to have this changed in the system. Please let us know what we have to do to accomplish this. Thank you.

Notes:

Add Notes

Figure 5.10 – Questions/Comments Log – Un-Resolved

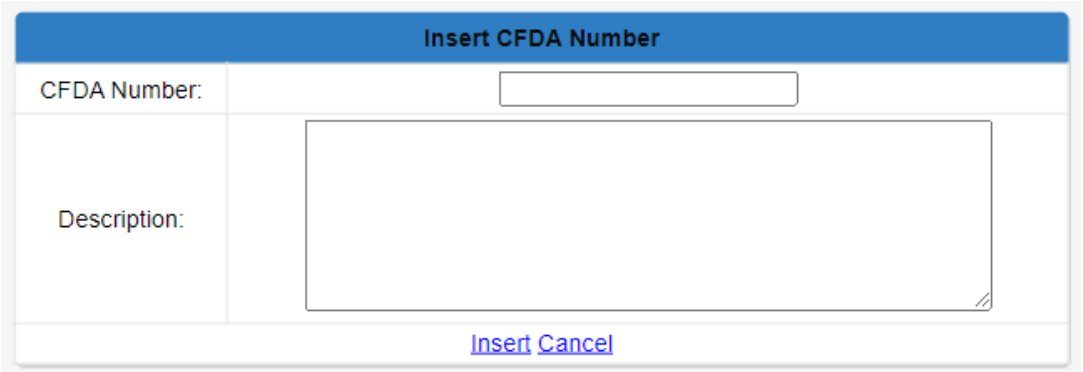
### 5.7 CFDA Number Updates

Promoted System Administrators are able to add new Funding CFDA Numbers to display in the Module 2C C3.b.12 and C.3I dropdown lists by selecting the **Insert New CFDA** link. A CFDA number can be selected to be **Inactive** if not to be used going forward. A new table will allow data entries that appear on the list and are sorted in numerical order. To change the CFDA number or its description, select the associated number’s **Select link**.

CFDA Number Details			
<a href="#">Insert New CFDA</a>			
	CFDA Number	Description	Inactive
<a href="#">Select</a>	10.001	Agricultural Research_Basic and Applied Research	<input type="checkbox"/>
<a href="#">Select</a>	10.025	Plant and Animal Disease, Pest Control, and Animal Care	<input type="checkbox"/>
<a href="#">Select</a>	10.028	Wildlife Services	<input type="checkbox"/>
<a href="#">Select</a>	10.030	Indemnity Program	<input type="checkbox"/>

Figure 5.11 – CFDA Number Updates

After choosing the **Insert New CFDA** button, a pop-up box displays to enter the new CFDA Number and its description.

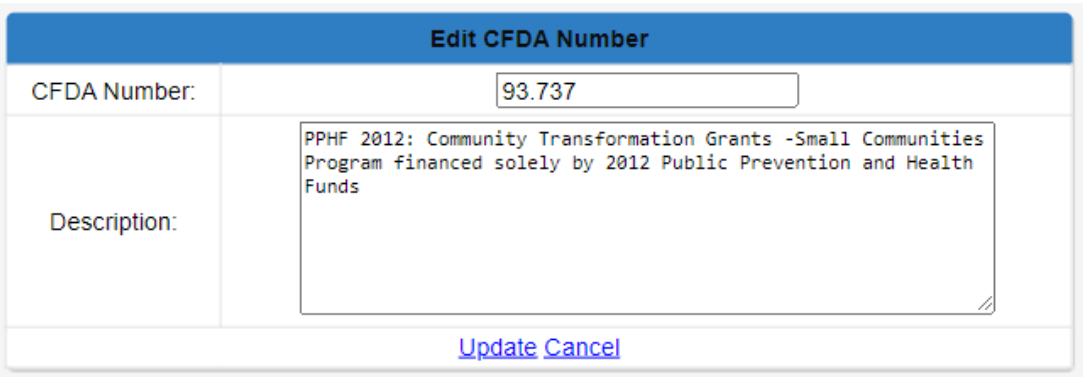


The screenshot shows a pop-up window titled "Insert CFDA Number" with a blue header bar. It contains two input fields: "CFDA Number:" with a text box and "Description:" with a larger text area. At the bottom, there are two links: "Insert" and "Cancel".

Insert CFDA Number	
CFDA Number:	<input type="text"/>
Description:	<div></div>
<a href="#">Insert</a> <a href="#">Cancel</a>	

Figure 5.12 – CFDA Number Updates – Insert New

After choosing the **Select** link, a pop-up box displays to existing CFDA Number and its description.



The screenshot shows a pop-up window titled "Edit CFDA Number" with a blue header bar. It contains two input fields: "CFDA Number:" with a text box containing "93.737" and "Description:" with a larger text area containing "PPHF 2012: Community Transformation Grants -Small Communities Program financed solely by 2012 Public Prevention and Health Funds". At the bottom, there are two links: "Update" and "Cancel".

Edit CFDA Number	
CFDA Number:	<input type="text" value="93.737"/>
Description:	<div>PPHF 2012: Community Transformation Grants -Small Communities Program financed solely by 2012 Public Prevention and Health Funds</div>
<a href="#">Update</a> <a href="#">Cancel</a>	

Figure 5.13 – CFDA Number Updates – Edit Existing

## 6 Administration – Report Utilities

For all System Admins, the **Report Utilities** options provide information on when a user modified a report section or a Module 3 Initiative (**Figure 6.1**), and a list of agencies submitted or not submitting their target/quarter report information (**Figure 6.2**). Promoted System Admins are able (*but needs to be used by IT Development*) to export Module 3 data to Smart Forms (**Figure 6.3**), export Module 2 and 4 data to an XML (**Figure 6.4**), and to run reports (**Figures 6.5 – 6.7**).

### 6.1 Section Modification Dates

This option provides an at-a-glance view of the last modified by, date, and time for each report section for an agency.

Agency: <input type="text" value="Community Action, Inc."/> <input type="button" value="Select"/> <input type="button" value="End Masquerade"/>				
Report Sections				
Module	Section	User	Quarter Saved	Last Modified
Module 4: A (Quarterly)	FNPI 1 - Employment	Rhodes, Rodney	Target Numbers	3/15/2021 2:52:29 PM
Module 4: A (Quarterly)	FNPI 1 - Employment	Fusco, Susan	First Quarter	5/25/2021 2:20:39 PM
Module 4: A (Quarterly)	FNPI 1 - Employment	Fusco, Susan	Second Quarter	7/22/2021 11:49:26 AM
Module 4: A (Quarterly)	FNPI 1 - Employment	Rhodes, Rodney	Third Quarter	10/19/2021 4:40:49 PM
Module 4: A (Quarterly)	FNPI 2 - Education/Cognitive Development	Rhodes, Rodney	Target Numbers	3/16/2021 11:16:48 AM
Module 3				
Initiative Name		Details Last Modified		Report Last Modified
Opportunity Youth		3/16/2021 12:34:24 AM by Rodney Rhodes		

Figure 6.1 – Section Modification Dates

### 6.2 Quarter Status Pages

There are five (5) links to view the quarter reporting status (Target, First, Second, Third, Fourth). Each displays the same type of data but are specific to their respective report quarter. All agencies are listed on each page, either as **Submitted** or **Not Submitted**. If the report was submitted, the row has a Quarter Submission Date.

Third Quarter Actuals Submitted		
Organization Name	Executive Director Name	Date
Agency for Community EmPOWERment of NEPA	Jim Wansacz	10/18/2021 3:28 PM
Fayette County Community Action Agency, Inc.	James Stark	10/20/2021 2:14 PM
Venango County Community Support Services	Shannon Mahoney	10/20/2021 9:45 AM
Third Quarter Actuals Not Submitted		
Organization Name	Executive Director Name	
Allegheny County Department of Human Services	Abigail Horn	
Armstrong County Community Action Agency	CRYSTAL JACK	

Figure 6.2 – Quarter Status Example

### 6.3 Export to Module 3 Smart Forms

Though accessible to Promoted System Admins, this option is to be completed by IT (they are available to investigate unexpected results). The **Export To Module 3 Smart Forms** option is used to export Module 3 data to the Smart Form Excel file provided by NASCSP for data reporting. If data is not locked for reporting for the

selected report year, the page will not display controls.

Once data is locked, it can be exported. **Note:** the XML Tag Names used to export this data are stored in the database and the “backend” of the page available to IT. If the tags change due to COPOS changes or changes in the Smart Forms, there will need to be changes by IT for this function to work properly.

To export data, upload an Excel file (if needed), then select a file from the dropdown list. Select the **Export to M3 Smart Forms** button to generate an Excel file for each initiative in the system for the currently selected report year. Once complete, green text displays with the location of the resulting files. If an error occurs during the export, red text displays the error.



Figure 6.3 – Export to Module 3 Smart Forms

## 6.4 Export to XML (Modules 2 and 4)

Though accessible to Promoted System Admins, this option is to be completed by IT (they are available to investigate unexpected results). Much like the Module 3 Exports, the Module 2 and 4 XML exports depend on XML Tag Names for each question. These are stored in the database and are migrated with the report content. If the XMLs provided by NASCSP have changes, these question tag names must be updated using the [Content Management](#) page.

To create an XML for each agency for Module 2 or 4, select the module from the dropdown list then select the **Export** button. The **Include notes in exported XML files** checkbox will increase the size of the XML, which may prevent acceptance in OLDC. Unless OLDC is fully set up to accept the notes, it is **best to not use** the “Include notes in exported XML files” at this time.

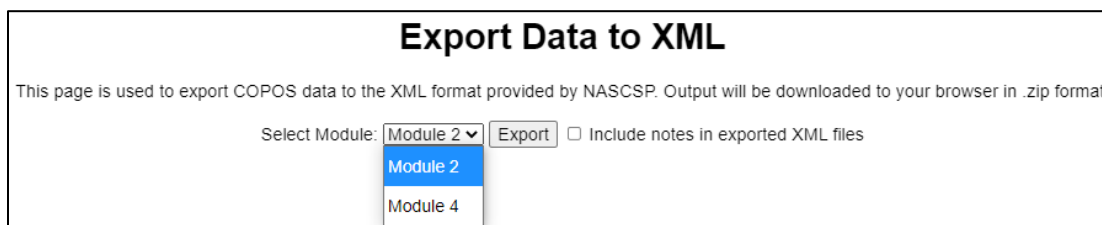


Figure 6.4 – Export Module 2 or 4 to XML



In order for the export to work, a template XML file must be placed in the “[COPOS root folder] \documents\Exports\XML\COPOS 20YY\Module X\filename.xml” path. After successfully exporting the XMLs, green text displays stating the export succeeded. If an error occurs, the error text and stack trace displays in red. Successfully exported files are located in the “[COPOS root folder]\documents\Exports\XML\COPOS 2019\Module 2\” path. Note: This is where Module X equals the appropriate Module (M2 or M4) and export will be the same.

## 6.5 Generate Additional Indicator Report (Module 4: A)

Selecting the **Generate Additional Indicator Report (Module 4:A)** link, Promoted System Admins are able to generate a PDF report listing all additional indicator text answers by each agency for the selected COPOS report year.

COPOS 2021 - Module 4:A Additional Indicator Answers		
10/20/2021 03:17:17: PM.		
Section	Agency	Answer
FNPI 1 - Employment	Agency for Community EmPOWERment of NEPA	The number of individuals participating in workforce development services provided through SLHDA Workforce Initiative
FNPI 1 - Employment	Agency for Community EmPOWERment of NEPA	Security clearances provided for employment opportunities (Identigo)
FNPI 4 - Housing	Agency for Community EmPOWERment of NEPA	The number of households being Weatherized due to the SLHDA Weatherization Deferral Program.

Figure 6.5 – Additional Indicator Report

## 6.6 Generate Module 1 D2 Report (September 30 OS Report)

Selecting the **Generate Module 1 D2 Report (September 30 OS Report)** link, Promoted System Admins are able to generate a PDF listing Module 1 D2 section information of the Annual Report. It displays overall Organizational Standards compliance as percentages. The report pulls historical data from the previous September 30<sup>th</sup> data.

Module 1: D.2 (as of September 30, 2021)				
Target vs. Actual Performance on the Organizational Standards				
Fiscal Year	State CSBG Plan Target	Number of Entities Assessed	Number that Met All (100%) of State Standards	Actual Percentage Meeting All (100%) of State Standards
COPOS 2021	None	43	7	16.28 %
Indicate the number of entities that met the following percentages of Organizational Standards.				
Note - While the State targets the percent of CSBG Eligible Entities to meet 100% of the Organizational Standards, targets are not set in the State Plan for 90%, 80%, 70%, 60% progress indicators.		Number of Entities Assessed	Number that Met between 90% and 99% of State Standards	Actual Percentage
		43	15	34.88 %
		Number of Entities Assessed	Number that Met between 80% and 89% of State Standards	Actual Percentage
		43	10	23.26 %
		Number of Entities Assessed	Number that Met between 70% and 79% of State Standards	Actual Percentage
		43	5	11.63 %
Percentage Meeting Organizational Standards by Category				
Category	Number of Entities Assessed	Number that Met All Standards in Category	Actual Percentage	
Category one: Consumer Input and Involvement	43	31	72.09 %	
Category two: Community Engagement	43	26	60.47 %	

Figure 6.7 – Module 1 D2 Report

## 6.7 Generate 'Agency Data Wheel' Excel Sheet

Selecting the **Generate 'Agency Data Wheel' Excel Sheet** link, Promoted System Admins are able to generate an Excel showing a data set for each agency summarizing various Annual Report data points.

A1												

Figure 6.8 – Agency Data Wheel Report

## 7 Organizational Standards

Promoted System Admins are able [to](#) manage Organizational Standards, the associated documentation and types, and help information. All System Admins are able to view agency transactions and run Organization Standards reports. The following sections are found in the **Admin -> Administration -> Organizational Standards** tab.

### 7.1 Organizational Standards Management

Promoted System Admins are able to edit Organizational Standards. The OS Report has three levels: goals, categories, and standards. Each goal contains a set of categories containing a set of standards.

If a new goal, category or standard is needed, DCED needs to work with IT to properly create it. If a goal, category or standard is no longer needed, DCED needs to work with IT to expire/remove it to ensure previous reporting years are not impacted. An existing Org Standard can be modified by selecting its associated **Edit** link.

Organizational Standards Management						
Category one: Consumer Input and Involvement						
Standard	Text	Public/Private	Required	# Days	Board	
Standard 1.1 (public)	The department demonstrates low-income individuals' participation in its activities.	Public	Yes	undefined	No	<a href="#">Edit</a>
Standard 1.2 (public)	The department analyzes information collected directly from low-income individuals as part of the community assessment.	Public	Yes	undefined	No	<a href="#">Edit</a>
Standard 1.3 (public)	The department has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the tripartite/advisory board, which may be met through broader local government processes.	Public	Yes	undefined	Yes	<a href="#">Edit</a>
Standard 1.1 (private)	The organization demonstrates low-income individuals' participation in its activities.	Private	Yes	undefined	No	<a href="#">Edit</a>

Figure 7.1 – Goal Table

The **Edit Standard** pop-up box displays. Short Text, Text, the # of Days (days of compliance: 365 = Annual, 730 = 2 years, 1095 = 3 years, and 1825 = 5 years), if the Standard is Required to be addressed by the agency, and if Board attention is required (is used to indicate importance on reports).

Standard 0.11 (private) board within the past 5 years.

### Edit Standard

Short Text:

Text:

# of Days:

Required: ☒

Board: ☐

The department submits its annual CSBG Information Survey data report and it

Figure 7.2 – Category Table

### 7.2 Documentation Type Management

Promoted System Admins use **Documentation Type Management** to update or delete existing types or add new ones. To add a new documentation type, enter the name in the **Add New** text box and select the **Insert** link (Figure 7.4). To change information for an existing type, select the **Update** link and change the text (Figure 7.3). The change is saved automatically. To remove a documentation type, select the associated **Delete** link. A confirmation message box displays – select the **OK** button to remove the Documentation Type or the **Cancel** button to not delete it.

Manage Documentation Types	
Participation Lists	<a href="#">Update</a> <a href="#">Delete</a>
Group Documents	<a href="#">Update</a> <a href="#">Delete</a>
Whistleblower Policy or Handbook	<a href="#">Update</a> <a href="#">Delete</a>
<b>Add New</b>	
	<a href="#">Insert</a>

Figure 7.3 – Add Documentation Type

Add New	
	<a href="#">Insert</a>

Figure 7.4 – Add Documentation Type

### 7.3 Standard Documentation Type Management

This **Standard Documentation Type Management** page provides Promoted System Admins a way to edit the standard documentation selection requirements on the OS Report page. **Note:** It is recommended to work with or have IT Development make the necessary changes. If a new Organizational Standard is needed, IT Development will add the required standard documentation types.

To begin, select the Standard from the dropdown list. Depending on the Standard selected, information will display differently (**Figures 7.5 and 7.6**). If a Group Documentation Type listed for the Standard is no longer applicable, select the **Remove** link.

The **Validation Type (All Groups)** dropdown list is used to set how all validation groups work together. There are three (3) options:

- **All Groups True** – all groups for the standard must evaluate to true for documentation to be valid
- **At Least One Group True** – one or more groups must evaluate to true for documentation to be valid
- **Exactly One Group True** – only one group can be true for documentation to be valid.

**Validation Type (This Group)** for the group is selected using the dropdown list. The options are:

- **Must Select All** – the group is only valid if all items in the group are selected
- **Must Select At Least One** – the group is valid if one or more items in the group is selected
- **Must Select Exactly One** – the group is valid only if one item is selected.

If a Group Documentation Type needs to be added to the Standard, select the type from the **Add Documentation Types** dropdown list and select the **Add** link.

## Manage Standard Documentation Types

Standard:

Validation Type (All Groups):

### Groups

Validation Type (This Group):

Group Text:

#### Group Documentation Types

Participation Lists	<a href="#">Remove</a>
Group Documents	<a href="#">Remove</a>
Advisory Group Minutes	<a href="#">Remove</a>
Advisory Board Activities	<a href="#">Remove</a>
Board Meeting Minutes	<a href="#">Remove</a>

**Add Documentation Types:**

[Add](#)

Figure 7.5 – Standard Documentation Type Management – Example 1

Standard:

Validation Type (All Groups):

### Groups

Validation Type (This Group):

Group Text:

#### Group Documentation Types

Methodology section of the CNA detailing the process to include low-income individuals [Remove](#)

**Add Documentation Types:**

[Add](#)

Validation Type (This Group):

Group Text:

#### Group Documentation Types

Notes from community forums or focus groups, transcripts from interviews that included low-income individuals	<a href="#">Remove</a>
Samples of surveys from low-income individuals	<a href="#">Remove</a>
Minutes of meeting where the data was analyzed for the CNA	<a href="#">Remove</a>
CNA	<a href="#">Remove</a>

**Add Documentation Types:**

[Add](#)

Figure 7.6 – Standard Documentation Type Management – Example 2

## 7.4 Organizational Standards Transaction Log

**Organizational Standards Transaction Log** provides a way for all System Admins to view changes to an agency's OS report. Changes to any OS Standard by any agency user are displayed. The Standard, Transaction (action), Last Modified (date/time and user), and Value are listed for each transaction.

Organizational Standards Report Transaction Log			
Agency: Blueprints ▼ Select End Masquerade			
Standard 1.1 (private) ▼			
Standard	Transaction	Report Last Modified	Value
Standard 1.1 (private)	Approve Standard	6/2/2021 10:52:37 AM by Darlene Bigler	True
Standard 1.1 (private)	Date Of Compliance Change	6/2/2021 10:39:26 AM by Hannah Kennedy	5/11/2021
Standard 1.1 (private)	Date Of Compliance Change	6/2/2021 10:39:06 AM by Hannah Kennedy	05/11/2020
Standard 1.1 (private)	Update Document Reference	6/2/2021 10:36:49 AM by Hannah Kennedy	Entire Document

Figure 7.7 – Organizational Standards Transaction Log Example

## 7.5 Organizational Standards Compliance Summary

All System Admins are able to select **Organizational Standards Compliance Summary** to display each agency, their Executive Director's name and the number of Standards met out of the total. When all Standards are met, the cell is highlighted in green; otherwise, it is highlighted in red.

All Agencies		
Organizational Standards CEE Summary		
Generated on 1/26/2022 at 2:37 PM		
Private CSBG Eligible Entities	Executive Director	Standards Met
Agency for Community EmPOWERment of NEPA	Jim Wansacz	58/58
Armstrong County Community Action Agency	CRYSTAL JACK	58/58
Berks Community Action Program, Inc.	LAWRENCE BERRINGER	48/58
Blair County Community Action Program	Sergio Carmona	48/58
Blueprints	Darlene Bigler	51/58
Bucks County Opportunity Council, Inc.	Erin Lukoss	58/58
Carbon County Action Committee for Human Services	Kimberley Miller	45/58

Figure 7.8 – Organizational Standards Compliance Summary

## 7.6 Aggregate Organizational Standard Compliance Graphic

System Admins are able to view the number of agencies meeting each Standard. When all agencies have met a Standard, the cell is highlighted in green; otherwise, it is highlighted in red. In **Figure 7.9**, 35 indicates the total number of active agencies in COPOS who fall into either the Private or Public chart. The chart below shows Private CAAs.

<b>All Agencies</b>	
<b>Complete Organizational Standards Summary</b>	
Generated on 10/21/2021 at 1:32 PM	
<b>Organizational Standards For Private CEES</b>	
<b>Category one: Consumer Input and Involvement</b>	<b>Met Standard</b>
<b>Standard 1.1 (private)</b> - The organization demonstrates low-income individuals' participation in its activities.	23/35
<b>Standard 1.2 (private)</b> - The organization analyzes information collected directly from low-income individuals as part of the community assessment.	29/35
<b>Standard 1.3 (private)</b> - The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.	34/35
<b>Category two: Community Engagement</b>	<b>Met Standard</b>
<b>Standard 2.1 (private)</b> - The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.	27/35
<b>Standard 2.2 (private)</b> - The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.	30/35

**Figure 7.9 - Aggregate Organizational Standard Compliance Graphic**

## 7.7 Generate Compliance Summary PDF

The **Compliance Summary** report (**Figure 7.10**) is available to all System Admins. The PDF report displays the overall “Met” status of each standard. There are four (4) parts to the report:

1. List of private Standards
2. For each Standard, a list (if any) of all private agencies not meeting the Standard
3. List of public Standards
4. For each Standard, a list (if any) of all public agencies not meeting the Standard.

For each Standard, the number of agencies meeting the Standard for the prior and current quarters and the percentage Change between the numbers is displayed. **Change** information is in red font if there is a decrease, in green if an increase, or in green if both quarters are at 100%.

The **Not Met – Needs Documentation and/or Approval** information indicates out of the agencies not meeting the Standard, the number indicates how many require documentation and/or Standard approval. Standard 1.1 in **Figure 7.10** displays 2/35 “Not Met” and 28/35 in the current quarter. The 2/35 indicates of the 7 agencies with the Standard not “Met”, 2 agencies need to upload documentation and/or have their agency ED approve the Standard.

# Organizational Standards Summary Report - Private CAAs

## Compliance Overview As Of September 30, 2021

Standard	As of August 31, 2021	Change	Not Met - Needs Documentation and/or Approval	As of September 30, 2021
<b>Standard 1.1 (private)</b> - The organization demonstrates low-income individuals' participation in its activities.	32/35 [91.43%]	↓ [-11.43%]	2/35	28/35 [80.00%]
<b>Standard 1.2 (private)</b> - The organization analyzes information collected directly from low-income individuals as part of the community assessment.	35/35 [100.00%]	[0.00%]	0/35	35/35 [100.00%]
<b>Standard 1.3 (private)</b> - The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.	35/35 [100.00%]	↓ [-2.86%]	0/35	34/35 [97.14%]
<b>Standard 2.1 (private)</b> - The organization has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.	34/35 [97.14%]	↓ [-8.57%]	3/35	31/35 [88.57%]
<b>Standard 2.2 (private)</b> - The organization utilizes information gathered from key sectors of the community in assessing needs and resources, during the community assessment process or other times. These sectors would include at minimum: community-based organizations, faith-based organizations, private sector, public sector, and educational institutions.	33/35 [94.29%]	↑ [2.86%]	1/35	34/35 [97.14%]

Figure 7.10 – Compliance Summary Report

## 7.8 Agency Organization Standards 12-Month History

System Admins have the ability to view a selected agency's **Organizational Standards 12 Month History** by selecting **Organizational Standards -> OS History** in the left navigation menu. The latest report month display at the end of the table. The **Met** column indicates the number of agency Org Standards within the 24-month timeframe are met. The **Not Met** column indicates the number that are Awaiting Approval or are Not Met. The total of the two columns is always 24. Use the Select Date dropdown to change the 12-month period that displays in the table.

<div>Agency: Blueprints <span>Select</span> <span>End Masquerade</span></div> <div> <a href="#">Download</a>   <a href="#">Send As Email</a>            Select Date: Dec 2021 <span>▼</span> </div>															
Organizational Standards 12 Month History															
		Jan 2020 - Dec 2021		2021											
Total Percentage of Standards Met Over 12 Month History		Met	Not Met	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30	10/31	11/30	12/31
98.85%		98.56%	1.44%	100.00%	98.28%	100.00%	100.00%	94.83%	100.00%	100.00%	100.00%	100.00%	100.00%	93.10%	100.00%
Maximum Feasible Participation															
		Jan 2020 - Dec 2021		2021											
Category one: Consumer Input and Involvement		Met	Not Met	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30	10/31	11/30	12/31
1.1	The organization demonstrates low-income individuals' participation in its activities.	23	1	Met	Met	Met	Met	Not Met	Met	Met	Met	Met	Met	Met	Met
1.2	The organization analyzes information collected directly from low-income individuals as part of the community assessment.	24	0	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met
	The organization has a systematic approach for														

Figure 7.10 – Agency Org Standard 12-Month History Table



## 8 Transaction Logs

The **Transaction Logs** options provide System Admins the ability to view an agency's users navigation and changes to the agency data. The logs provide details such as username, message (or action), notes, user performed by, and date/time of the event. Messages/actions shown in this log include user type changes, board or key staff changes, report submission, account reactivation/deactivation, etc.

### 8.1 Transaction Log

The **Transaction Log** option displays changes made by a user and when. The Message is the action taken by the user. Agency information can be filtered for a specific agency user and/or a from/to date timeframe.

Transaction Logs					
Filters					
Organization: Allegheny County Department of Human Services					
User: All					
From: To:					
Update					
User	Agency	Message	Notes	Performed By	Date/Time
abigailhorn	Allegheny County Department of Human Services	Second Quarter Actuals Submitted		abigailhorn	7/27/2021 10:35:47 AM
johnwl59	Allegheny County Department of Human Services	Board Member Data Changed	BoardMemberID:855,OldStartTerm:6/10/2019	johnwl59	6/14/2021 3:10:51 PM

Figure 8.1 – Compliance Summary Report

### 8.2 Page Visits Log

System Admins can use the **Page Visit** Log option to view, by agency, where a user has been within COPOS. It can be used as a high-level audit log. Filters for User and From/To dates can be used to narrow the results displayed.

Page Visits					
Filters					
Organization: Allegheny County Department of Human Services					
User: All					
From: To:					
Update					
User	Agency	Message	Notes	Performed By	Date/Time
johnwl59	Allegheny County Department of Human Services	Visited Page	<a href="https://pa-copos.dced.pa.gov/Auth/manage_initiatives.aspx">https://pa-copos.dced.pa.gov/Auth/manage_initiatives.aspx</a>	johnwl59	7/6/2021 11:25:03 AM
johnwl59	Allegheny County Department of Human Services	Visited Page	<a href="https://pa-copos.dced.pa.gov/Auth/dashboard.aspx">https://pa-copos.dced.pa.gov/Auth/dashboard.aspx</a>	johnwl59	7/6/2021 11:25:00 AM

Figure 8.2 – Page Visits Log Example

### 8.3 Organizational Standards Transaction Log

System Admins are able to view an agency's organizational standards transactions by selecting the agency name and the Standard name. The log displays the Standard, the Transaction action, when the transaction occurred and the agency user making the change and the associated Value.

Organizational Standards Report Transaction Log

Agency: Community Action, Inc. Select

Standard 1.1 (public) ▾

Standard	Transaction	Report Last Modified	Value
Standard 1.1 (public)	Approve Standard	10/7/2021 1:07:18 PM by Linda Herzog	True
Standard 1.1 (public)	Executive Director Initials Change	10/7/2021 1:07:12 PM by Linda Herzog	MT
Standard 1.1 (public)	Unapprove Standard	10/7/2021 1:05:24 PM by Linda Herzog	False
Standard 1.1 (public)	Approve Standard	6/3/2021 4:23:08 PM by Melanie Sheeler	True
Standard 1.1 (public)	Remove Document	6/3/2021 4:22:49 PM by Melanie Sheeler	30956
Standard 1.1 (public)	Update Document Reference	6/3/2021 4:22:43 PM by Melanie Sheeler	Tri one

Figure 8.3 – OS Report Transaction Log Example

## 9 Maintenance – Maintenance Message

Promoted System Admins are able to use the **Maintenance Message** option on the **Maintenance** tab but it should generally be used by IT only if there is an issue with the system or to make a system update. The option provides a way to lock all users out of the system for updates. Entering a message in the box will show a preview banner similar to how it displays on the maintenance screen.

Enter a message then select the Start button to begin Maintenance Mode. **NOTE:** Once the Start button is selected, users will not be able to login until the **Stop** button is selected.

Once the system is in Maintenance Mode, any request to the system that is not already authenticated will redirect to the Maintenance screen. To gain access while Maintenance Mode is enabled, use the “AccessString” query string with the value provided by the IT Developers. This will prevent the redirect and allow logging into the system.

To end maintenance mode, log in with the “AccessString”, go to the Maintenance Mode tab and select the **Stop** button.

The screenshot shows a web application interface for the Maintenance Message feature. At the top, there is a navigation bar with tabs: Report Management, Management Utilities, Report Utilities, Organizational Standards, Transaction Logs, Maintenance (selected), and Misc. Below the navigation bar, the title "Maintenance Message" is displayed. A text box contains the message: "COPOS will be undergoing maintenance between now and later. Check back then...". Below the text box are two buttons: "Start" and "Stop". A paragraph of text explains: "By clicking the 'Start' button, users will no longer be able to login. They will be displayed with a maintenance status message. Maintenance mode will continue until the 'Stop' button is clicked. During this time only System Administrators will have access to the system." Below this text is a link: "COPOS Administrator Manual". At the bottom of the interface, there is a footer section that says "COPOS was developed and is maintained by Community Action, Inc." and a prominent yellow banner with red text that reads: "COPOS will be undergoing maintenance between now and later. Check back then..."

Figure 9.1 – Maintenance Tab – Maintenance Message

## 10 Misc

Currently, there is only one option on the **Misc** tab and it is available to all System Admins.

### 10.1 Aggregate Board Report

Selecting the **Aggregate Board Report** link displays a PDF report listing each agency's Aggregate Board Listing. The sector heading includes the current number of Board members and the number of members there should be for the sector based on the agency's bylaws.

CARBON COUNTY ACTION COMMITTEE FOR HUMAN SERVICES		
Elected Public Officials (5/5)		
John Yudichak Brent Green	Carole Tulay Rocky Ahner	Sara Keiser
Private Sector (4/5)		
Kenneth Leffler Mr Melissa Hawk	Todd Smolinsky	Kerri Quick
Representatives of Low-Income (5/5)		
Carol Daniels Sharon Frye	Stanley Haupt Shannon Everett	Gail Solomon

Figure 10.1 – Aggregate Board Report

# 11 Dashboard

DCED Promoted System Admins and System Admins are able to view their alerts, agency high-level agency monitoring statuses, **All Agency Quarterly Submission Statuses**, the **Overall Current** Status of agency Board Memberships, OS Compliance, and Report Submissions, a status by agency of their Board Membership by section and Org Standard status by category, and their quarterly report submission status, and view an agencies **Needs Attention** information.

## 11.1 All-Agency Monitoring Alert Table

Promoted System Admins' view of the All-Agency Monitoring Alert Table displays information for all agencies by descending Due Date order. Program Specialists will only see monitoring information for their assigned agencies. Seven lines display in the table by default – to display more, select the **Show More** link and to display only seven, select the **Show Less** link. Select an Agency link to display the related **Monitoring Details** on the Edit Organization Information screen and the **Monitoring Details** tab. Details about the Monitoring Details table are found in the [Agency Monitoring Details section](#).

All-Agency Monitoring Alert Table						<a href="#">Show More</a>
<a href="#">Agency</a>	<a href="#">Pgm Monitor</a>	<a href="#">Type Due</a>	<a href="#">Reason</a>	<a href="#">Monitoring Completed</a>	<a href="#">Status</a>	<a href="#">Date Due</a>
<a href="#">Tri-County</a>	Janelle	On-Site	3-Year	Yes	Respond to Agency	12/31/2021
<a href="#">ACDHS</a>	Janelle	On-Site	3-Year	No	Monitoring Needed	2022
<a href="#">TREHAB</a>	John	On-Site	3-Year	No	Monitoring Needed	2022
<a href="#">USCAA</a>	Melissa	On-Site	3-Year	No	Monitoring Needed	2022
<a href="#">Warren</a>	Melissa	On-Site	3-Year	No	Monitoring Needed	2022
<a href="#">WCA</a>	John	On-Site	3-Year	No	Monitoring Needed	2022
<a href="#">ACCAA</a>	Janelle	On-Site	3-Year	No	Monitoring Needed	2022

Figure 11.1 – Dashboard – All-Agency Monitoring Alert Table

### Edit Organization Information

Agency: Community Action Commission
Select
End Masquerade

Monitoring Details
Organization Details
Monitor Letter

Monitoring Details			
Organization Name	Community Action Commission		Short Name Tri-County
Monitoring Due for 2022	On-Site	Reason	3-Year
Last Monitoring & Type	2/1/2021	Type	Desk
Last On-Site Monitoring	5/17/2019		
Risk Assessment	12/21/2021	Risk Assessed	200 Critical Issue No
Planned Monitoring	Jan	Scheduled Date	01/01/2022
Monitoring Completed	12/01/2021	Type	On-Site
Letter/Report Sent to Agency	mm/dd/yyyy		
Action Required			
Response Type/Received Date		mm/dd/yyyy	
Response Rejected/Date		mm/dd/yyyy	
Response Accepted	mm/dd/yyyy		

Save
Cancel

Figure 11.2 –All-Agency Monitoring Alert Table Selection – Monitoring Details Table

## 11.2 Agency Needs Attention Table

When a System Admin selects to masquerade as an agency, the agencies dashboard displays – including the Needs Attention table. Select a link in the table to display that selection.

Any items such as the Agency Questionnaire, Work Plan, Annual Report, etc. are displayed as **Past Due Items** link. The number of **Board Vacancies** by sector display.

**OS Not Met & Signature Req'd** displays any of the agency Org Standard numbers that are not met and waiting for the ED, delegated Local Admin or delegated User to approve (Awaiting Approval). **Other Not Met OS** displays any of the agency Org Standard numbers that are Not Met.

**Current Due Dates** lists any upcoming dates for agency submittal(s).

Needs Attention	
Past Due Items	(none)
Board Vacancies	<a href="#">0 Low Income</a> <a href="#">0 Public</a> <a href="#">0 Private</a>
OS Not Met & Signature Req'd	<a href="#">7.4</a> <a href="#">7.5</a> <a href="#">7.8</a>
Other Not Met OS	<a href="#">4.3</a> <a href="#">4.6</a> <a href="#">7.3</a> <a href="#">7.6</a> <a href="#">7.9</a> <a href="#">8.1</a>
Current Due Dates	<a href="#">COPOS 2021 4th Quarter 2/14</a> <a href="#">COPOS 2021 (CARES) 6/4</a>

Figure 11.3 – Dashboard – Selected Agency Needs Attention Table

## 11.3 Dashboard Alerts

Alerts display on the dashboard for DCED System Admins, an agency Executive Director, agency Local Admins, and at times Users granted Organizational Standard and/or Work Plan access. **Figure 11.4** displays each Alert Type, when the associated alert is created, and who receives the alert.

AlertType	Created When...	Created for...
DCED OS Alert	An Agency approves a standard	DCED Admins (visible on dashboard by Pgm Specialist)
Agency OS Alert	A standard is submitted to the ED by a Local Admin	Agency ED
Agency Executive Director Override Alert	A Local Admin submits an override to ED	Agency ED
Agency Work Plan Available Alert	Work Plan allocations are released to agencies (creates alert for each agency)	Agency ED, Local Admin, User with Work Plan access
Agency Send Back Review Needed	Send Back is sent to agency	Agency ED, Local Admin, User with Annual Repo access
DCED Override Received	Agency Submits an override	DCED Admins (visible on dashboard by Pgm Specialist)
Agency Override Returned	DCED denies an override	Agency ED, Local Admin
DCED Agency Questionnaire Submitted	Agency submits agency questionnaire	DCED Admins (visible on dashboard by Pgm Specialist)
Agency Questionnaire Returned	DCED sends back agency questionnaire	Agency ED, Local Admin, User
Agency Work Plan Returned	Work Plan is sent back to agency	Agency ED, Locals Admin, User with Work Plan access
DCED Work Plan Submitted	Agency Submits Work Plan	DCED admins (visible on dashboard by Pgm Specialist)
Agency OS Timeframe Alert	OS expiration is within timeframe defined by the agency	Agency ED, Local Admin, User with write permission to the corresponding Standard
DCED Discretionary Request Submitted	Agency submits a discretionary request	DCED Admins (visible on dashboard by Pgm Specialist)
Agency Discretionary Request Returned	DCED denies a discretionary request	Agency ED, Local Admin, Users with Work Plan access

Figure 11.4 – Dashboard Alerts – Type-When Created-Who Receives

## 12 Agency Questionnaires

Agencies will submit their annual Agency Questionnaire in COPOS beginning in 2022 for the 2023 reporting year. System Admins have the Agency Questionnaire menu options. Select **Review Agency** Questionnaires to view submitted (but not accepted) and accepted questionnaire and the status of each agency's questionnaire (**Figure 12.5**). When submitted to DCED, the agency displays in the **Submitted – Agency Questionnaire** table.

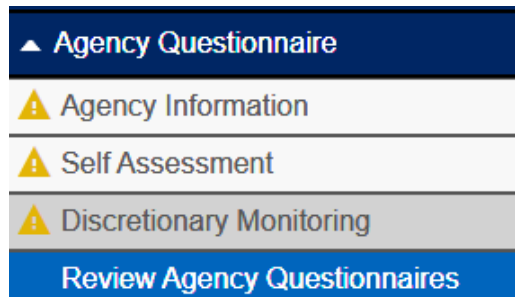


Figure 12.1 – Agency Questionnaire Menu Options

Select the **Agency** short name link to view the Agency Information section or select the **Download PDF** link to view the full questionnaire as a PDF report. At the bottom of the Agency Information, Self Assessment, and Discretionary Monitoring sections are a comment box and **Continue** button. If there are issues/questions with a section, enter a comment and select the button – the next section of the questionnaire displays for review.

[View In Progress Questionnaires](#)
[Download PDF Full Page](#)

Submitted - Agency Questionnaires			
Agency	Date	PDF Version	Program Specialist
<a href="#">CSO</a>	10/22/2021	<a href="#">Download PDF</a>	Melissa Tabb

Total Questionnaires Accepted = 3

Agency Questionnaires Accepted			
Agency	Date	PDF Version	Approver
<a href="#">Delaware</a>	10/1/2021	<a href="#">Download PDF</a>	Linda Herzog
<a href="#">SCCAP</a>	9/17/2021	<a href="#">Download PDF</a>	Melanie Sheeler
<a href="#">USCAA</a>	10/13/2021	<a href="#">Download PDF</a>	Linda Herzog

Figure 12.2 – Agency Questionnaire Status Tables

Add comments to Agency Questionnaire and Send Back. Note, if comments exist in any section, only the Send Back is enabled

Continue

Figure 12.3 – Agency Questionnaire – Section Comment Box

At the bottom of the Discretionary Monitoring section, a comment can be entered (**Figure 11.4**). If a comment has been entered in any of the boxes, only the **Send Back Questionnaire** button is available. Select the button. An e-mail notification is sent and agency users receive a dashboard alert. The agency will make changes as needed and submit to DCED again for review and send back or acceptance.

If the agency's questionnaire does not require any changes (and no comments are entered), select the **Accept Questionnaire** button. An e-mail notification is sent to agency users.

Add comments to Agency Questionnaire and Send Back. Note, if comments exist in any section, only the Send Back is enabled

Accept Questionnaire
Send Back Questionnaire

Figure 12.4 – Agency Questionnaire – Accept-Send Back Buttons

## 12.1 View In Progress Questionnaires

Select the **View in Progress Questionnaires** link (**Figure 12.2**) to view an agency list and the status of their questionnaire. If the questionnaire has been sent back or accepted by a System Admin, the date and associated status display. An "In Progress" status indicates the agency has entered and saved some information in a section of their questionnaire.

Select the **Download PDF Full Page** to display the **Agency Questionnaires In Progress** table information as a PDF report.

Select the **Download PDF** link to view the agency's completed questionnaire as a PDF report.

Select the **View Pending & Accepted Questionnaires** link to display the Submitted and Accepted tables (**Figure 12.2**).

[View Pending & Accepted Questionnaires](#)
[Download PDF Full Page](#)

Agency Questionnaires In Progress				
Agency	Date	PDF Version	Status	Program Specialist
<a href="#">ACCAA</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">ACDHS</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">BCAP</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">BCOC</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">BCP</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">Beaver Co.</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">Blair Co.</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">Blueprints</a>		<a href="#">Download PDF</a>	In Progress	Melissa Tabb
<a href="#">CACLV</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">CADCOM</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">CAI</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">Cambria</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">CAPMC</a>		<a href="#">Download PDF</a>	In Progress	Melanie Sheeler
<a href="#">Carbon Co.</a>		<a href="#">Download PDF</a>	In Progress	Melanie Sheeler
<a href="#">CCA</a>		<a href="#">Download PDF</a>	Not Started	Melissa Tabb
<a href="#">Central PA</a>	9/27/2021	<a href="#">Download PDF</a>	Sent Back	Melanie Sheeler

Figure 12.5 – Agency Questionnaire Statuses



## 13 Agency Work Plans

Agencies will submit their annual Agency Work Plan in COPOS beginning in 2022 for the 2023 reporting year. System Admins have the Work Plan/Discretionary option. Select the **Review Agency Work Plans** to view Work Plans submitted to DCED for review and processed Work Plans.

▲ Work Plan / Discretionary
▲ CSBG Community Action Plan
▲ Budget
Enrollment Goals
Subcontractors
Review Agency Work Plans
Discretionary Request
Review Discretionary Requests

Figure 13.1 – Work Plan Menu Options

Select the agency **Name** to view the CSBG Community Action Plan (CAP) section

Download PDF Versions links

- **Full Work Plan** - to view the full Work Plan
- **CAP & Goals** - to view the CAP and Enrollment Goals sections
- **Budget** - to view the full Budget section
- **ESA Budget** - to view the ESA Budget (the total of the high-level sections and the CSBG Program total).

The **Download PDF Full Page** link displays all of the Review Agency Work Plans screen information.

At the bottom of the CSBG Community Action Plan, Budget, and Enrollment Goals sections are a comment box and **Continue** button. If there are issues/questions with a section, enter a comment and select the button – the next section of the questionnaire displays for review.

<a href="#">View Work Plans In Progress With Agency</a>			<a href="#">Download PDF Full Page</a>		
Work Plans - Ready for Review					
Pgm Spec	Name	Submit Date	Download PDF Versions		Status
Melanie Sheeler	<a href="#">CAPMC</a>	9/17/2021	<a href="#">Full Work Plan</a>	<a href="#">CAP &amp; Goals</a> <a href="#">Budget</a> <a href="#">ESA Budget</a>	Submitted
Total Work Plans Processed = 1					
Work Plans - Processed					
Name	Submit Date	Download PDF Versions		Processor	
<a href="#">Central PA</a>	9/27/2021	<a href="#">Full Work Plan</a>	<a href="#">CAP &amp; Goals</a> <a href="#">Budget</a> <a href="#">ESA Budget</a>	Linda Herzog	

Figure 13.2 – Review Agency Work Plans Status Tables

At the bottom of the CSBG Community Action Plan, Budget, and Enrollment Goals sections are a comment box and **Continue** button (**Figure 13.3**). If there are issues/questions with a section, enter a comment and select the button – the next section of the questionnaire displays for review.

Add comments to include with send back. Otherwise, if section is OK, simply click "Continue"

Continue

Once all Work Plan sections are complete, submit the Work Plan from the [Work Plan Status page](#)

**Figure 13.3 – Agency Work Plan Menu Options**

At the bottom of the Subcontractors section, a **Send Back to Agency** button is available. If returning to the agency ensure a comment has been entered in at least one (1) of the comment boxes then select the button. An e-mail notification is sent and agency users receive a dashboard alert. The agency will make changes as needed and submit to DCED again for review and send back or processing

If the agency's Work Plan does not require any changes (and no comments are entered), select the **Process WP** button. An e-mail notification is sent to agency users.

Add comments to to Work Plan and Process or Send Back. Please note, if comments exist on any section of the Work Plan, only the Send Back is enabled.

Send Back to Agency Process WP

**Figure 13.4 – Agency Work Plan – Section Comment Box**

### ***13.1 View Submitted & Processed Work Plans***

Select the **View Work Plans in Progress with Agency** link (**Figure 13.2**) to view an agency list and the status of their Work Plan (**Figure 13.5**). An "In Progress" status indicates the agency has entered and saved some information in a section of their Work Plan. An "In Process (Sent Back)" indicates the agency has submitted their Work Plan but it has been sent back for changes to be made.

Select the **Download PDF Full Page** to display the **Work Plans - Pending** table information as a PDF report.

Select the **Full Work Plan** link to view the agency's completed Work Plan as a PDF report.

Select the **View Submitted & Processed Work Plans** link to display the Ready for Review and Processed tables (**Figure 13.2**).

[View Submitted & Processed Work Plans](#)[Download PDF Full Page](#)

Total Work Plans In Progress = 10 | Total Work Plans Not Started = 31

Work Plans - Pending			
Pgm Spec	Agency	PDF Version	Status
Melissa Tabb	<a href="#">ACCAA</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">ACDHS</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">BCAP</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">BCOC</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">BCP</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">Beaver Co.</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">Blair Co.</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">Blueprints</a>	<a href="#">Full Work Plan</a>	In Progress (Sent Back)
Melissa Tabb	<a href="#">CACLV</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">CADCOM</a>	<a href="#">Full Work Plan</a>	Not Started
Melissa Tabb	<a href="#">CAI</a>	<a href="#">Full Work Plan</a>	In Progress
Melissa Tabb	<a href="#">Cambria</a>	<a href="#">Full Work Plan</a>	In Progress
Melanie Sheeler	<a href="#">Carbon Co.</a>	<a href="#">Full Work Plan</a>	In Progress (Sent Back)

Figure 13.5 – Agency Work Plan Statuses

### 13.2 Print Previously Submitted Agency Work Plans

System Admins are able to download and e-mail Work Plans for an agency that were previously submitted and sent back to the agency (the current Work Plan is available using the **Complete Work Plan** option. Each submitted/sent back Work Plan is listed as a **Prior Work Plans which were Submitted**. Select the desired Work Plan to download and/or e-mail. If the agency does not have any previously submitted/sent back Work Plan, the **Prior Work Plans** section does not display.

### Download Report Content

Agency:

Report Font Size  Aa

Administrator Reports

Agency Questionnaire Report

Work Plan Reports

**Complete Work Plan**  
*Prints entire Work Plan including Attachments*  
☒ Full ☐ Blank

**Work Plan Sections**  
*Prints Work Plan CSBG Community Action Plan or Work Plan Budget*  
☒ CAP ☐ Budget **Note: Enrollment Goals should be printed from Module 4:A Reports**

**Prior Work Plans which were Submitted**  
*Prints entire Work Plan including Attachments*  
☒ WP Submitted 1/27/2022 ☐ WP Submitted 1/27/2022

Figure 13.6 – Print Agency Work Plans Previously Submitted/Sent Back

# 14 Discretionary Funding Requests

Agencies will submit their request for Discretionary Funding in COPOS beginning in 2022 for the 2023 reporting year. System Admins have the Work Plan/Discretionary option. Select the **Review Discretionary Requests** to view requests submitted to DCED for review and processed requests.

▲ Work Plan / Discretionary
⚠ CSBG Community Action Plan
⚠ Budget
Enrollment Goals
Subcontractors
Review Agency Work Plans
Discretionary Request
Review Discretionary Requests

Figure 14.1 – Discretionary Request Menu Options

Requests in the **Pending Review** table display the requested amount and no processed amount. The **Discretionary Funds Processed** table displays the requested amount and the amount DCED processed for the request.

PDF Versions links:

- **Name** link - to view the CSBG Community Action Plan (CAP) section
- **Download PDF** - to view the full discretionary funding request
- **Narrative Only** - to view the CAP section
- **Budget** - to view the full Budget section
- **ESA Budget** - to view the ESA Budget (the total for each high-level section and the CSBG Program total)
- **Download PDF Full Page** – to view all of the Review Discretionary Requests screen information.

<a href="#">View In Progress &amp; Deleted Requests</a>				<a href="#">Download PDF Full Page</a>		
Discretionary Funds Pending Review						
Agency	PgmSpec	Name	PDF Versions	Status	Request Amount	Processed Amount
BCAP	Melissa Tabb	<a href="#">Berks Community Action Program, Inc.</a>	<a href="#">Download PDF Narrative Only Budget Only ESA Budget</a>	Submitted	\$250,000	N/A
Beaver Co.	Janelle Bischof	<a href="#">Beaver County, PA – 2022 CSBG Discretionary Funding Request</a>	<a href="#">Download PDF Narrative Only Budget Only ESA Budget</a>	Submitted	\$65,000	N/A
CACLV	Melissa Tabb	<a href="#">Color Outside The Lines: Plan Implementation</a>	<a href="#">Download PDF Narrative Only Budget Only ESA Budget</a>	Submitted	\$250,000	N/A
Pathstone	John Winters	<a href="#">PathStone Corporation</a>	<a href="#">Download PDF Narrative Only Budget Only ESA Budget</a>	Submitted	\$250,000	N/A
Totals					\$815,000	\$0
Discretionary Funds Processed						
Agency	Name		PDF Versions	Processor	Request Amount	Processed Amount
Central PA	<a href="#">Central Pennsylvania Community Action, Inc.</a>		<a href="#">Download PDF Narrative Only Budget Only ESA Budget</a>	Melissa Tabb	\$90,315	\$90,315
CEO	<a href="#">Emergency Food for Seniors</a>		<a href="#">Download PDF Narrative Only Budget Only ESA Budget</a>	John Winters	\$150,000	\$150,000
CSO	<a href="#">CSO Human Resources COVID-19 Coordinator</a>		<a href="#">Download PDF Narrative Only Budget Only ESA Budget</a>	Melissa Tabb	\$66,767	\$66,767

Figure 14.2 – Review Agency Discretionary Request Status Tables

At the bottom of the CSBG Community Action Plan, Budget, and Enrollment Goals sections are a comment box and **Continue** button. If there are issues/questions with a section, enter a comment and select the button – the next section of the questionnaire displays for review.

At the bottom of the request, are Process Amount and comment entry boxes (**Figure 14.3**). If the request requires changes, enter a comment (with no Processed Amount) then select the **Deny Funding** button (**Figure 14.4**). An e-mail notification is sent and agency users receive a dashboard alert. The agency will make changes as needed and submit to DCED again for review and denial or processing

If the agency's request does not require any changes, enter the **Process Amount**, a comment, then select the **Process Discretionary Funds** button (**Figure 14.5**). An e-mail notification is sent to agency users.

The screenshot shows a web form titled "Add Comments to include with e-mail to DCED" at the top. Below the title is a large text area for comments. Underneath the comment box are two buttons: "Submit to DCED" and "Save". Below these buttons is a label "Process Amount \$0" followed by a text input field. Below the input field is a red text requirement: "Required: Add Comments to include with e-mail to agency." Below this requirement is another large text area for comments. At the bottom of the form are two buttons: "Process Discretionary Funds" and "Deny Funding".

Figure 14.3 – Review Agency Discretionary Request – Processed Amount & Comment Boxes

The screenshot shows the same form as Figure 14.3, but with a red border around the comment box. The "Process Amount" input field now contains "\$0". The "Required" text is still present. The comment box contains the text "Information needs to be added." The "Process Discretionary Funds" button is disabled (grayed out), and the "Deny Funding" button is active (highlighted).

Figure 14.4 – Review Agency Discretionary Request – Not Approved

The screenshot shows the same form as Figure 14.3, but with a green border around the comment box. The "Process Amount" input field now contains "\$6525". The "Required" text is still present. The comment box contains the text "Request approved". The "Process Discretionary Funds" button is active (highlighted), and the "Deny Funding" button is disabled (grayed out).

Figure 14.5 – Review Agency Discretionary Request - Approved

## 14.1 View In Progress & Deleted Requests

Select the **View In Progress & Deleted Requests** link (Figure 14.2) to view submitted agency Discretionary Requests – either In Progress or Sent Back or requests the agency has deleted. An “In Progress” request with no Request Amount indicates the agency has started the request, has not entered a Request Amount yet and not submitted it to DCED. An “In Progress” request with a Request Amount indicates the agency has entered a Request Amount but has not submitted the request to DCED.

Select the **Download PDF Full Page** to display the **Work Plans - Pending** table information as a PDF report.

Select the **Download PDF** link to view the agency’s Discretionary Request as a PDF report.

Select the **View Pending & Processed Requests** link to display the Pending and Processed request tables (Figure 14.2).

<a href="#">View Pending &amp; Processed Requests</a>			<a href="#">Download PDF Full Page</a>		
Discretionary Funds - In Progress					
Agency	Name	PDF Version	Status	Request Amount	Processed Amount
BCOC	<a href="#">Tammy Schoonover</a>	<a href="#">Download PDF</a>	In Progress	-	N/A
Cambria	<a href="#">Community Action Partnership of Cambria County</a>	<a href="#">Download PDF</a>	In Progress	\$20,000	N/A
ICCAP	<a href="#">ICCAP Retention and Hiring Incentive Program</a>	<a href="#">Download PDF</a>	In Progress	\$36,000	N/A
Lancaster	<a href="#">Linda's Test Request</a>	<a href="#">Download PDF</a>	Sent Back	\$15,975	N/A
Lancaster	<a href="#">COVID Project</a>	<a href="#">Download PDF</a>	Sent Back	\$10,525	N/A
USCAA		<a href="#">Download PDF</a>	In Progress	-	N/A
Venango	<a href="#">Venango County Human Services</a>	<a href="#">Download PDF</a>	In Progress	\$60,000	N/A
Totals				\$142,500	\$0
Discretionary DELETED					
Agency	Name	PDF Version	Status	Request Amount	Processed Amount
(None)					

Figure 14.6 – Review Agency Discretionary Requests – In Progress & Deleted Tables

## 15 Agency Status Report Screen

System Admins are able to select an agency and view their Status Report screen which is available to the agency Executive Director, Local Admins, and Users with Annual Report write access. The information is used as quick snapshot of any reported items which are not aligning so the agency can make corrections as needed. As all Annual Report modules, except Module 4A, are not reported until the 4<sup>th</sup> Quarter, the information displayed on the screen is only applicable to the fourth quarter report. After 12/31 of the current Program year, the menu option displays: **Report Status -> Status Report Screen** in the left navigation menu.

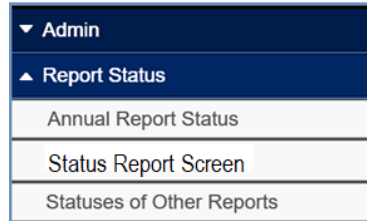


Figure 15.1 – Status Report Screen Menu Option

**Note:** At this time, the red indicators do not prevent submission of the Annual Report. They serve as a “warning light” to alert the agency to items that they need to work towards addressing and alert Program Specialists to work with these agencies to address various concerns.

Legend	
<span style="color: green;">■</span>	OK - Good to Go!
<span style="color: yellow;">■</span>	Review - Attention Getter - Action Not Required, if results are intended
<span style="color: orange;">■</span>	Explain or Update - Notes / Explanation Required
<span style="color: red;">■</span>	Updates Required - Please Complete Section (Enter Note)

Figure 15.2 – Status Report Screen Legend

Below are each of the status tables on the Report Status Screen followed by a chart showing the origins of the data displayed on each table.

Domain or Specific Program	CSGB Expenditure (2A)	Other Expenditures	People (4C)	Services (4B)	Outcomes (FNPI 4A)
▼ Employment	<span style="background-color: yellow;">\$0</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Education	<span style="background-color: green;">\$86,778</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Head Start		<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Income / Asset Building	<span style="background-color: yellow;">\$0</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Housing	<span style="background-color: green;">\$125,023</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Weatherization		<span style="background-color: yellow;">■</span>	N/A	N/A	N/A
▼ Health & Social	<span style="background-color: yellow;">\$0</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Nutrition		<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Civic Engagement	<span style="background-color: green;">\$95,241</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Multiple Domains	<span style="background-color: green;">\$576,067</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>	<span style="color: green;">■</span>
▼ Linkages	<span style="background-color: green;">\$0</span>	N/A	N/A	N/A	N/A
^ Capacity Building	<span style="background-color: green;">\$61,565</span>	N/A	N/A	N/A	N/A
Notes: Click or tap here to enter note...					
^ Emergency / Other	<span style="background-color: green;">\$0</span>	N/A	N/A	N/A	N/A
Notes: Click or tap here to enter note...					

Figure 15.3 – Status Report Screen – Domain-Specific Program Indicators



<b>CSBG Expenditure (2A)</b>	<ul style="list-style-type: none"> <li>Module 2A.2a CSBG Funds number = Employment CSBG Expenditure number.</li> <li>Module 2A.2b CSBG Funds number = Education CSBG Expenditure number.</li> <li>Module 2A.2c CSBG Funds number = Income / Asset Building CSBG Expenditure number.</li> <li>Module 2A.2d CSBG Funds number = Housing CSBG Expenditure number.</li> <li>Module 2A.2e CSBG Funds number = Health &amp; Social CSBG Expenditure number.</li> <li>Module 2A.2g CSBG Funds number = Civic Multiple Domains CSBG Expenditure number.</li> <li>Module 2A.2h CSBG Funds number = Linkages CSBG Expenditure number.</li> <li>Module 2A.2i CSBG Funds number = Agency Capacity Building CSBG Expenditure number.</li> <li>Module 2A.2j CSBG Funds number = Emergency / Other CSBG Expenditure number.</li> <li>Cell color is green if value &gt; 0.</li> <li>Cell color is yellow if value = 0 and related Services and/or Outcomes are reported for the domain.</li> </ul>
<b>Other Expenditures</b>	Linkages, Capacity Building and Emergency / Other display: N/A Cells are green <ul style="list-style-type: none"> <li>Education Head Start – cell is green if Module 2C.3b3 and/or 2C.3b4 &gt; 0; otherwise, cell is yellow.</li> <li>Housing Weatherization – cell is green if Module 2C.3a and/or 2C.3b2 &gt; 0; cell is yellow if Module 2C.3a and 2C.3b2 = 0.</li> <li>Health &amp; Social Nutrition – cell is red if Module 4A.5a = 0 and Module 2C.3c1 or 2C.3c3 &gt; 0; cell is red if Module 4A.5a = 0 and Module 4B.5ff or 4B4.jj &gt; 0.</li> </ul>
<b>People (4C)</b>	Linkages, Capacity Building and Emergency / Other display: N/A <ul style="list-style-type: none"> <li>Education Head Start – display N/A if Other Expenditures cell is yellow; display red if Other Expenditures cell is green and Module 4C.2a = 0; cell is green if Module 4C.2a &gt; 0.</li> <li>Housing Weatherization – display N/A if Module 2C.3a and 2C.3b2 = 0; cell is green if Module 4C d.12a to 4C d.12g &gt; 0; otherwise cell is red.</li> </ul> Cells are green. Cells are red if: <ul style="list-style-type: none"> <li>Education – Module 4C.2a + c.2h = 0.</li> <li>Employment – Module C.2d + c.2h = 0.</li> <li>Income/Asset Building – Module 4C.2d + c.2i = 0.</li> <li>Civic Engagement – Module 4C.2d + 2e + 2f + 2g + 2h + 2i + 2j + 2k = 0.</li> </ul>
<b>Services (4B)</b>	Linkages, Capacity Building and Emergency / Other display: N/A <ul style="list-style-type: none"> <li>Education Head Start – display N/A if Other Expenditures cell is yellow and Module 4B.2a and/or 4B.2b = 0; cell is green if Module 2C.3b3 and 2C.3b4 and &gt; Module 4B2.1a + 4B.2b; cell is green if Module 2B.2a and 2C.3b4 &gt; 0; cell is green if Module 2B.2b and 2C.3b3 &gt; 0;</li> <li>Housing Weatherization – display N/A if Module 2C.3a and 2C.3b2 = 0; cell is green if Module 4B.45 &gt; 0; otherwise cell is red.</li> </ul> Cells are green. Cells are red if: <ul style="list-style-type: none"> <li>Employment – Sum of all SRV 1 sections = 0.</li> <li>Education – Sum of all SRV 2 sections = 0.</li> <li>Income / Asset Building = Sum of all SRV 3 sections = 0.</li> <li>Housing – Sum of all SRV 4 sections = 0.</li> <li>Health &amp; Social – Sum of all SRV 5 sections = 0.</li> <li>Civic Engagement – Sum of all SRV 6 sections = 0.</li> <li>Multiple Domains – Sum of all SRV 7 sections = 0 or &gt; Module 4C A.1 Final number.</li> </ul>

Figure 15.4 – Status Report Screen – Domain-Specific Program Indicator Data Origins - a



<b>Outcomes (FNPI 4A)</b>	Linkages, Capacity Building and Emergency / Other display: N/A
	• Education Head Start – display N/A if Module 4A.2a and 4A.2b = 0 and Other Expenditures cell is yellow; cell is green if Module 4A.2a and 4A.2b >0; otherwise cell is red.
	• Housing Weatherization – display N/A if Module 2C.3a and 2C.3b2 = 0; cell is red if Module 4A.4g = 0; cell is yellow if Module 4A.4g > 0 and < Module 4A.4t; otherwise cell is green.
	Cells are green.
	Cells are red if:
	• Employment – Sum of FNPI sections = 0
	• Education – Sum of all FNPI 2 sections = 0.
	• Income / Asset Building – Sum of all FNPI 3 sections = 0.
	• Housing – Sum of all FNPI 4 sections = 0.
	• Health & Social – Sum of all FNPI 5 sections = 0.
	• Civic Engagement – Sum of all FNPI 6 sections = 0.
	• Multiple Domains – Sum of all FNPI 7 sections = 0.

Figure 15.4 – Status Report Screen – Domain-Specific Program Indicator Data Origins - b

Other Indicator Lights	
CSBG Funds Allocated (Includes Discretionary)	\$0
Administrative Expenses	0%
Un-Met Organizational Standards	32
Os that Were Un-Met for More than 3 Months	15
Last Report Submissions (reviews 2019 and 2020)	0
Outcomes Not Between 80% to 120%	92%

Figure 15.5 – Status Report Screen – Other Indicator Lights

<b>CSBG Funds Allocated (Includes Discretionary).</b>	Dollar amount displayed = your agency Allocation + Discretionary Processed Amounts. Cell displays green.
<b>Administrative Expenses percentage.</b>	Cell displays green if Module 2: A.2k Percentage Administrative Costs is 0.0 to < 17.0%. Cell displays yellow if Module 2: A.2k Percentage Administrative Costs is 17.0 to < 20.0%. Cell displays red if Module 2: A. 2k Percentage Administrative Costs is >= 20.0%.
<b>Un-Met Organizational Standards number</b>	Number of "Unmet" Standards on the OS Report. Cell displays green if number = 0. Cell displays red if number > 0.
<b>OS Un-Met for More than 3 Month</b>	Number of "Unmet" Standards on the OS Report that have been unmet for > 3 months. Cell displays green number = 0. Cell displays red if number > 0.
<b>Late Report Submissions (reviews 2 years) number</b>	Number of dashboard Report Submissions Statuses that are NOT green or gray. Cell displays green if number = 0. Cell displays red if number > 0.
<b>Outcomes Not Between 80% and 120%</b>	Number of Module 4A FNPIs with data. Number of these modules outside the range. • For each FNPI above, divide the Final number by the Target number. If the number is <= .80 or >= 1.2, add to the 33 B. count. Numbers are the same. Divide A by B and multiple by 100. • Cell display green if the % is < 10%, yellow if the % is >= 10% and < 30 %, red if >= 3-%.

Figure 15.6 – Status Report Screen – Other Indicator Lights Data Origins

Expenditure Report & Comparison				
CSBG Allotment(s) From Work Plan	CSBG Discretionary	Total CSBG Funds	Annual Report CSBG Spent	Percentage Difference
\$0	\$0	\$0	\$944,674	0%

Figure 15.7 – Status Report Screen – Expenditure Report & Comparison

<b>CSBG Allotment(s) from Work Plan</b>	Allocation amount = CSBG Allotment(s) from Work Plan amount.
<b>CSBG Discretionary</b>	Sum of all Processed Requests = CSBG Discretionary amount.
<b>Total CSBG Funds</b>	Allocation amount + sum of Processed Requests = Total CSBG Funds amount.
<b>Total CSBG Funds</b>	Work Plan allocation amount + sum of Processed Requests.
<b>Annual Report CSBG Spent</b>	Module 2A.2k CSBG Funds = Annual Report CSBG Spent amount.
<b>Verify Percentage Difference.</b>	$(CSBG\ Funds - Annual\ Report\ CSBG\ Spent) / CSBG\ Funds = \text{Percentage Difference.}$ <p>Cell displays:</p> <p>Light yellow if percent is 0 to &lt;1%.</p> <p>Darker yellow if percent is 1 to 3%.</p> <p>Orange if percent is 3 to 5%.</p> <p>Red if percent is &gt;5%.</p>

**Figure 15.8 – Status Report Screen – Expenditure Report & Comparison Data Origins**

Review Miscellaneous Other Items				
Capacity Building	Funds \$61,565	Board Hrs 81	Staff Hrs 669	
	Resource development			
Volunteer Hours	Total Hours 23,357	Low-Income 5,550		
ROMA Certified	Trainers 0	Implementers 0		
Weatherization Certified = 0	Energy Auditors 0	Retrofit 0	Crew Leads 0	QCI 0
Senior Citizens Reported = 1512	Funds	Pa Sr. Pgms 3,375	Older Am Act 0	CMS 0
	Outcomes	Live Indep. 292	Services	Home Serv. 0
Youth Reported (14 - 24) = 2110		Before/After S 4	Summer Y 0	Summer Ed 0
		Behavior Imp. 0	Mentoring 0	Leadership 0
Linkages	Non-Profit 96	Faith Based 65	Local Gov't 22	State Gov't 9
	Federal Gov't 5	For Profit 122	Collaborations 13	School Dist 18
	Post-Secondary 11	Financial 5	Health Serv 48	Statewide 5

**Figure 15.9 – Status Report Screen – Review Miscellaneous Other Items**

<b>Capacity Building information</b>	Cells display green. <ul style="list-style-type: none"> <li>Funds amount = Module 2A.2i.  <ul style="list-style-type: none"> <li>If Funds &gt; \$0, Module 2A.A.4.1 sections with a Final checkmark display below the boxes.</li> </ul> </li> <li>Board Hrs = Module 2B.2.a; cell is yellow if number = 0.</li> <li>Staff Hrs = Module 2B.2.b; cell is yellow if number &lt; 40.</li> </ul>
<b>Volunteer Hours information</b>	Cells display green. <ul style="list-style-type: none"> <li>Total Hours = Module 2B.3a; cell is yellow if number &lt; 120.</li> <li>Low Income = Module 2B.3b; cell is yellow if number &lt; 40.</li> </ul>
<b>ROMA Certified information</b>	Cells display green. <ul style="list-style-type: none"> <li>Trainers = Module 2B.4a; cell is yellow if number = 0.</li> <li>Implementers = Module 2B.4b; cell is yellow if number = 0.</li> </ul>
<b>Weatherization Certified information</b>	Certified Number = Module 2B.4.g1; cell displays green if > 0, yellow if = 0 and 2C.3a and/or 2C.3b2 = 0, red if = 0 and 2C.3a and/or 2C.3b2 > 0. <ul style="list-style-type: none"> <li>Cells display green unless = 0 and Module 2C.3a and/or Module 2C.3bs &gt; 0 then displays as yellow; QCI displays as orange.  <ul style="list-style-type: none"> <li>Energy Auditors = Module 2B.4g.1.</li> <li>Retrofit = Module 2B.4g.2.</li> <li>Crew Leads = Module 2B.4g.3.</li> <li>QCI = Module 2B.4g.4.</li> </ul> </li> </ul>
<b>Senior Citizens Reported</b>	Reported number = Module 4C.2.i + 4C.2.j; cell displays green if > 0, yellow if = 0 and Funds = 0, red if = 0 and any Funds > 0. Funds – cells display green if > 0, yellow if = 0: <ul style="list-style-type: none"> <li>PA Sr. Pgms = Module 2 C.4.i</li> <li>Older Am Act = Module 2 C.3.b.5</li> <li>CMS = Module 2 C.3.b.7</li> </ul> Outcomes – cells display green if > 0, yellow if = 0 <ul style="list-style-type: none"> <li>Live Indep = Module 4A FNPI 5f</li> <li>Home Serv = Module 4A SRV 5i</li> </ul>
<b>Youth Reported (14 – 25)</b>	Reported number = Module 4C.2c + 4C.2d; cell displays green if Module 4B.2l through 4B.2q > 0; else cell displays red. Cell displays green if > 0, yellow if = 0 <ul style="list-style-type: none"> <li>Before/After S = Module 4B SRV 2.l</li> <li>Summer Y = Module 4B SRV 2.m</li> <li>Summer Ed = Module 4B SRV 2.n</li> <li>Behavior Imp = Module 4B SRV 2.o</li> <li>Mentoring = Module 4B SRV 2.p</li> <li>Leadership = Module 4B SRV 2.q</li> </ul>
<b>Linkages information – row 1</b>	Cell displays green if number > 0, else cell is yellow. <ul style="list-style-type: none"> <li>Non-Profit = Module 2B.5a.</li> <li>Faith Based = Module 2B.5b.</li> <li>Local Gov't = Module 2B.5c.</li> <li>State Gov't = Module 2B.5d.</li> </ul>
<b>Linkages information – row 2</b>	Cell displays green if number > 0, else cell is yellow. <ul style="list-style-type: none"> <li>Federal Gov't = Module 2B.5e.</li> <li>For Profit = Module 2B.5f.</li> <li>Collaborations = Module 2B.5g.</li> <li>School Dist = Module 2B.5h.</li> </ul>
<b>Linkages information – row 3</b>	Cell displays green if number > 0, else cell is yellow. <ul style="list-style-type: none"> <li>Post-Secondary = Module 2B.5i.</li> <li>Financial = Module 2B.5j.</li> <li>Health Serv = Module 2b.5k.</li> <li>Statewide = Module 2B.5l.</li> </ul>

Figure 15.10 – Status Report Screen – Review Miscellaneous Other Items Data Origins