



Community Organization Planning & Outcome System

User Manual

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

COPOS is a Commonwealth of PA system for collecting and maintaining CSBG information.

Revised: 2/1/2022



Change Tracking Log

The following table serves as a log to track the section, change date, change description, and version of each change made to the document.

#	Section	Page	Change Date	Source of Change	Change Description
1	8 – Key Tab Information	44 - 45	12/23/2021	DCED	Added information on valid terms to enter for the Key Staff member who is head of the agency's board.
2	Updates for Phase 3 Release 3 (P3 R3)	14 – 16 22 - 24 29 – 31 50 64 72 - 75 74 - 75 79 98 - 99	01/31/2021	DCED	Added: <ul style="list-style-type: none"> • ED delegation information, renumbered figures. Report year button selection information. • Home page Needs Attention table information. • Replaced User role Permissions tables. • Monitoring Details tab/table information. • Information to enter a Work Plan Budget description if an allocation amount is entered. • Information on new Report Status Screen tables and data origins for each. • Information to do an Override for submitting a past due Annual Report. • Org Standard OS History Met/Not Met details. • Agency Questionnaire and Discretionary Request alert information; renumbered section figures.

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Using the COPOS System

1. Introduction

System Purpose

The **C**ommunity **O**rganization **P**lanning and **O**utcome **S**ystem (COPOS) enables Pennsylvania's Community Action Agencies (CAAs) to submit Community Services Block Grant (CSBG) Annual Report (AR) data and other CSBG data collection for the Organizational Standards Self-Assessment, and other CSBG data (including Work Plans, Pre-Monitoring Agency Questionnaire and Discretionary Request information). In addition, COPOS is used to submit the Annual Report to the Department of Health & Human Service (DHHS), Office of Community Service (OCS).

Web Browser Requirements

In your browser, you must enable the following:

- JavaScript (required for data validation and popup alerts). For assistance, please consult the instructions on the following website: <http://enable-javascript.com/>
- Cascading Style Sheets (colors and fonts are set via style sheets and the intended presentation of the data is only achieved if style sheets are enabled). Cascading Style Sheets are enabled by default in most browsers.

COPOS Access

To access COPOS, navigate to <https://pa-copos.dced.pa.gov/> using a Chrome or Microsoft Edge web browser. The COPOS Login page will display. Users must enter their Keystone Account user name and password.



Figure 1.1 – COPOS Login Screen

New User Access

New COPOS users must first register a Keystone Account (<https://keystonelogin.pa.gov/Account/Register>). After registering a Keystone Account, the user logs in to COPOS using their Keystone Account user name and password, selects an Organization/Agency, and enters a phone number and work e-mail address if not displayed, then selects the Submit link (**Figures 1.2 and 1.3**). An informational screen displays informing the user their Agency ED, Local Admin or a DCED Administrator must review and approve their information to allow access to COPOS (**Figure 1.4**).

Please select the name of your Agency/Organization from the dropdown list and enter your telephone extension if you have one.

If your name, phone, or e-mail below is incorrect, please [login to your Keystone Account](#) and click Edit Account to correct it before proceeding.

User Details	
First Name	User
Last Name	Test
Organization	--Select--
Phone	
Extension	
Email	

Existing COPOS Users: Email Address should be the same as your COPOS email address.

[Cancel](#)

Figure 1.2 – New User Initial Login

Please select the name of your Agency/Organization from the dropdown list and enter your telephone extension if you have one.

If your name, phone, or e-mail below is incorrect, please [login to your Keystone Account](#) and click Edit Account to correct it before proceeding.

User Details	
First Name	User
Last Name	Test
Organization	Agency Name
Phone	(717) 569-1212
Extension	
Email	usertest@pa.gov

Existing COPOS Users: Email Address should be the same as your COPOS email address.

[Submit](#) [Cancel](#)

Figure 1.3 – New User Initial Login – Organization, Phone, Email

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 1.4 – New User Initial Login Notification Message

A COPOS Data Administrator, agency Executive Director or agency Local Administrator reviews the information, and if accurate, approves access to COPOS and the user role. An e-mail notification of the approval is sent. If information is incorrect, it can be corrected in the person's Keystone Account. NOTE: If an incorrect Organization/Agency was selected, the person can login again and select the correct one (Figure 1.5).

PA KEYSTONE LOGIN

Contact the Keystone Login Help Desk for all questions, concerns and issues with Keystone Login.

Welcome

Please select one of the following options:

- Change Password
- Edit Account

Figure 1.5 – Keystone Account – Edit User Information

New User Requests

As an agency Executive Director or Local Administrator, you will receive an e-mail notification when an unapproved user logs into COPOS and has selected your Agency. To review and approve or deny a new user, select Admin then Edit Users. The user will display in the New User Requests table (**Figure 1.6**).


New User Requests						
Options	First Name	Last Name	Phone Number	Agency/Organization	E-mail Address	
 Approve Deny	User	Test	(717) 569-1212	Agency Name	usertest@pa.gov	

Figure 1.6 – New User Requests Table

If the person had a previous approved COPOS login, their New User Request First Name, Last Name and E-mail Address should match their previous COPOS information. No gold triangle will display by the Approve link.

If a gold triangle displays next to the Approve link (**Figures 1.8 and 1.7**), select on it to display an explanation for the triangle. In the example below, User Test did not have a previously approved COPOS login. If you know the person should have COPOS access and their information is accurate, select the Approve link and assign them a user role (**Figure 1.8**). If the person should have COPOS access and their information is inaccurate, select the Deny link. The person can correct their information in their Keystone Account (**Figure 1.10**) or when they login again to COPOS. If the person should not have COPOS access, select the Deny link. **NOTE:** After a user registers a Keystone Account, the user should add their Email Address to their account (via Edit Account – **Figure 1.10**) in case they forget their Username.

User Management

Agency:

Keystone Login email address doesn't match COPOS email address. Clicking 'Approve' will create a new COPOS user account.


New User Requests						
Options	First Name	Last Name	Phone Number	Agency/Organization	E-mail Address	
 Approve Deny	User	Test	(717) 569-1212	Agency Name	usertest@pa.gov	

Figure 1.7 – New User Requests Table – Gold Triangle

User Details	
User Name	lkhwap
First Name	<input type="text" value="User"/>
Last Name	<input type="text" value="Test"/>
Organization	<input type="text" value="Agency Name"/>
Phone	<input type="text" value="(717)569-1212"/>
Extension	<input type="text"/>
Email Address	<input type="text" value="usertest@pa.gov"/>
User Type	<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #003366; color: white; padding: 2px;">User</div> <div style="background-color: #eee; padding: 2px;">User</div> <div style="background-color: #eee; padding: 2px;">Local Administrator</div> <div style="background-color: #eee; padding: 2px;">Executive Director</div> </div>
Receive Organizational Emails	<input type="checkbox"/>
<div style="display: flex; justify-content: space-between;"> Insert Cancel </div>	

Figure 1.8 – New User Request – Role Assignment

Annual Report Access: All agency Local Administrators and the Executive Director have full access to the agency's Annual Report sections. The User role is able to have No Access, Read Access, or Read/Write Access. A User Report Permissions table displays along with the User OS Permissions and Work Plan tables **Figure 1.9**).

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"/>
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			

Figure 1.9 – User Role – Annual Report Section Access

Organizational Standards Access: All agency Local Administrators and the Executive Director have full access to the agency's Organizational Standards sections. The User role is able to have No Access, Read Access, or Read/Write Access. A User OS Permissions table displays along with the User Report Permissions and Work Plan tables **Figure 1.10).**

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"/>
Grant Delegated Access for this User to Sign any Organizational Standard <input type="checkbox"/>			
Note: User must have full Access to All Organization Standards			

Figure 1.10 – User Role – Org Standard Section Access

Agency Work Plan Access: All agency Local Administrators and the Executive Director have full access to the agency's Work Plan. The User role is able to have No Access, Read Access, or Read/Write Access. A Work Plan Permission table displays along with the User Report and User OS Permissions tables and access is provided the same way (**Figure 1.11).**

User Work Plan Permissions			
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 1.11 – User Role – Work Plan Access

ED Delegation to Local Admins and Users

The agency's Executive Director has the capability to delete access to approving/submitting the Annual Report, Organizational Standards, Work Plan, and Discretionary Requests to agency personnel with a Local Admin or User COPOS role. Users must first be given Write Access to the Annual Report and/or the Org Standard in order to have delegation capability. Local Admins have full access to the Org Standards and Annual Report.

Local Admin Delegation

When approving a Local Admin user or selecting them from the **Users** table, select the delegation area(s) in their User Details table. Select the **Insert** or **Update** link.

User Details	
User Name	A3EDa3ed
First Name	<input type="text" value="Lehigh"/>
Last Name	<input type="text" value="Sheeler"/>
Organization	<input type="text" value="Community Action Program of Lancaster County"/>
Phone	<input type="text" value="(717)346-0806"/>
Extension	<input type="text"/>
Email	<input type="text" value="mesheeler@pa.gov"/>
User Type	<input type="text" value="Local Administrator"/>
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	
Update Cancel	

Figure 1.12 – Local Admin Delegation – User Details

User Delegation

When approving a User user or selecting them from the **Users** table, select the delegation area(s) in their User Details table. If **Organizational Standard** is selected and the user does not have Write Access in the User OS Permissions table, an informational message box displays. Close the box, select the **Check All Write Access** box and the Grant Delegated Access box in the permissions table, then select the Update link. The Organizational Standard box will be selected in their User Details table.

User Details	
User Name	A3EDa3ed
First Name	<input type="text" value="Lehigh"/>
Last Name	<input type="text" value="Sheeler"/>
Organization	<input type="text" value="Community Action Program of Lancaster County"/>
Phone	<input type="text" value="(717)346-0806"/>
Extension	<input type="text"/>
Email	<input type="text" value="mesheeler@pa.gov"/>
User Type	<input type="text" value="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	
Edit	

Figure 1.13 – User Delegation – User Details

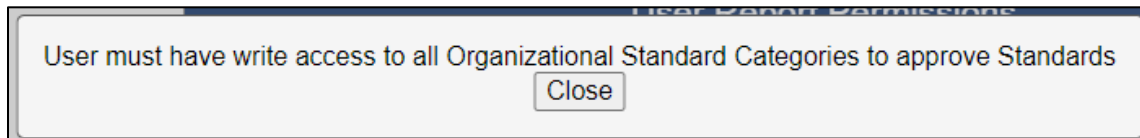


Figure 1.14 – User Delegation – Org Standard Selection Error Message

If **Annual Report** is selected and the user does not have Write Access in the User Report Permissions table, an informational message box displays. Close the box, select the **Check All Write Access** box and the Grant Delegated Access box in the permissions table, then select the Update link. The Annual Report box will be selected in their User Details table.

User Type

User

Please check user permissions after updating

Receive Organizational Emails

☒

Delegated Access for Submitting These Reports:

User must have Work Plan write access to submit Work Plans

Close

Update

Cancel

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"/>
Grant Delegated Access to Submit the Full Annual Report (All Modules & Re-Submissions)			
Note: Must have full Report Access. This will allow user to complete Overrides & Send Backs			

Figure 1.15 – User Delegation – Annual Report Selection Error Message

Delegated Access for Submitting These Reports:

☐ Work Plan

☐ Discretionary Request

☐ Organizational Standard

☒ Annual Report - This includes all Modules and re-submissions in the form of Override and Send Back

Edit

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

Figure 1.16 – User Delegation – Annual Report Permissions

User Agreement

The Commonwealth of Pennsylvania User Agreement (**Figure 1.12**) must be read and signed electronically (**Figure 1.13**) to gain access to COPOS. The document must be signed the first time the approved user logs into COPOS and renewed the first login after every January 1.

MANAGEMENT DIRECTIVE	
Commonwealth of Pennsylvania Governor's Office	
Subject: Commonwealth of Pennsylvania Information Technology Acceptable Use Policy	Number: 205.34 Amended
Date: February 18, 2021	By Direction of:  Michael Newsome, Secretary of Administration
Contact Agency: Office of Administration, Office for Information Technology, Telephone 717.787.5440, email: ra-ITCentral@pa.gov	

This directive establishes policy, responsibilities, and procedures for the acceptable use of Information Technology

Figure 1.17 - Commonwealth of Pennsylvania User Agreement

To sign the document electronically, type the first and last name into their respective textboxes (**Figure 1.13 - 2 and 3**) - this must be typed exactly as shown in bold (**Figure 1.13 - 1**). If the name is not typed as shown, the textbox will turn red and a warning will appear stating the entry does not match the name provided. Once the name is typed correctly, check the **I Agree** box (**Figure 1.13 - 4**) and select the **Sign Agreement** button (**Figure 1.13 - 5**). After electronically signing the document, a copy of the "signed" agreement will be stored in COPOS and sent to your e-mail address for your records.

Electronic Signature Agreement. By selecting the "I Agree" button, you are signing this Agreement electronically. You agree your electronic signature is the legal equivalent of your manual signature on this Agreement. By selecting "I Agree" you consent to be legally bound by this Agreement's terms and conditions. You further agree that your use of a key pad, mouse or other device to print your name constitutes your signature (hereafter referred to as "E-Signature"), acceptance and agreement as if actually signed by you in writing.

By signing this agreement electronically, you are agreeing to abide by the terms and conditions described in the text above.

Type your name as shown to the right: **Thomas Griffith** ← 1

2 → First Name **Tom** Last Name Griffith ← 3

Entry does not match name provided. Please type as shown above.

4 → ☒ I Agree

5 →

Clicking the Sign Agreement button will generate a PDF of the signed document for your records.

Figure 1.18 - Sign User Agreement

2. Managing COPOS Accounts

Passwords

User login passwords no longer expire through COPOS. Users must login using their Keystone Account username and password. Currently, Keystone Account does not require agency users to reset their password. Users are able to change their login password by changing it in their Keystone Account (**Figure 2.1**).

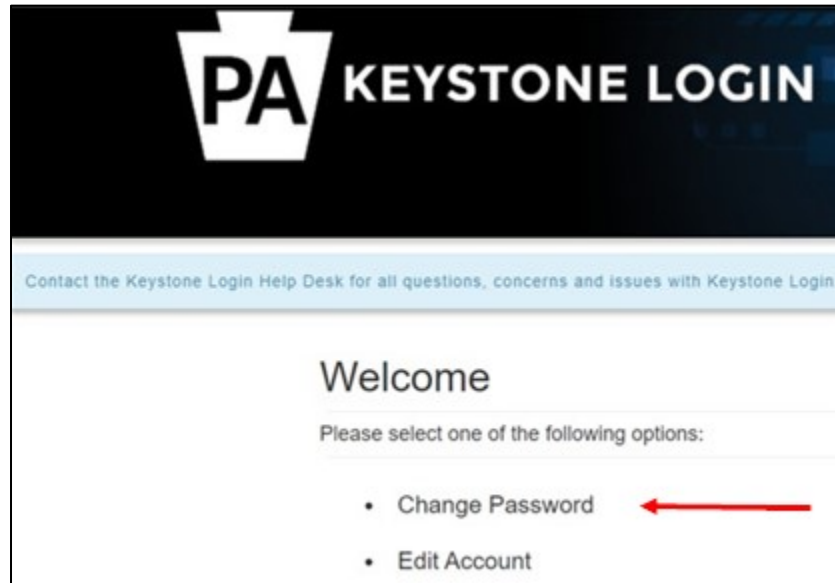


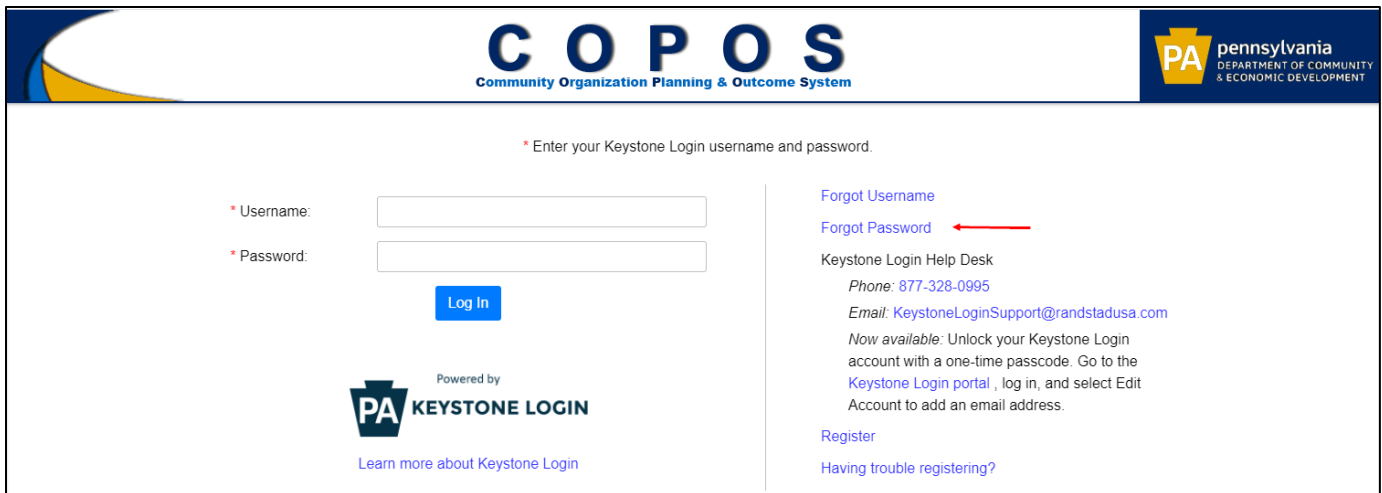
Figure 2.1 – Keystone Account Change Password Link

The image shows the 'PA KEYSTONE LOGIN' header. Below it is a light blue banner with the text 'Contact the Keystone Login Help Desk for all questions, concerns and issues with Keystone Login. The help desk can be reached by phone at 877-328-0995 or by email at KeystoneLo'. The main content area is white and says 'Change Password'. There are three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. Below the 'New Password' field are two buttons: 'Update' (blue) and 'Cancel' (white). To the right of the input fields are two sections of rules. The first section is titled 'The password must pass these rules:' and has two checkboxes: 'Must be between 12 to 128 characters in length.' and 'Do not include any of your username, your first name, or your last name.' The second section is titled 'The password must pass 3 out of 4 of these rules:' and has four checkboxes: 'One uppercase letter.', 'One lowercase letter.', 'One numeric number.', and 'One non-character (such as !, @, %, ^, etc.)'. Below these rules is a 'Password Strength: Invalid' label and a progress bar.

Figure 2.2 – Keystone Account Change Password

Forgot Password

If you forgot your password and need it reset, select the “Forgot Password” link on the COPOS login screen (**Figure 2.3**). The Keystone Account Forgot Your Password screen displays (**Figure 2.4**). Enter your Username and select the Submit button to start the process.



COPOS
Community Organization Planning & Outcome System

PA pennsylvania
DEPARTMENT OF COMMUNITY & ECONOMIC DEVELOPMENT

* Enter your Keystone Login username and password.

* Username:

* Password:

[Log In](#)

Powered by
PA KEYSTONE LOGIN

[Learn more about Keystone Login](#)

[Forgot Username](#)

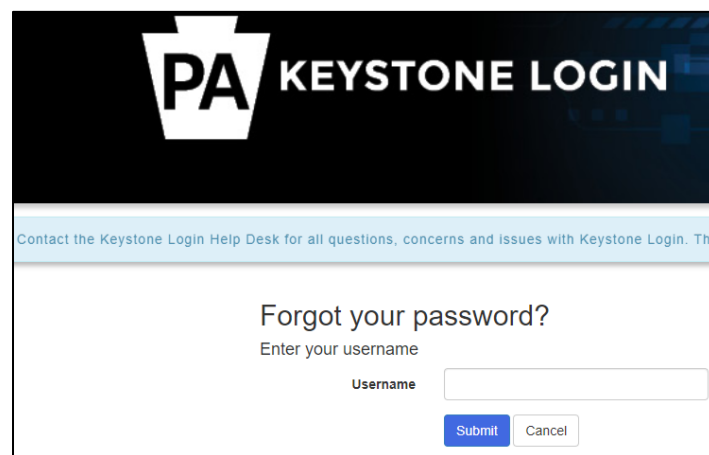
[Forgot Password](#) ←

Keystone Login Help Desk
Phone: 877-328-0995
Email: KeystoneLoginSupport@randstadusa.com
Now available: Unlock your Keystone Login account with a one-time passcode. Go to the [Keystone Login portal](#), log in, and select Edit Account to add an email address.

[Register](#)

[Having trouble registering?](#)

Figure 2.3 – COPOS Login Screen - Forgot Password Link



PA KEYSTONE LOGIN

Contact the Keystone Login Help Desk for all questions, concerns and issues with Keystone Login. The

Forgot your password?

Enter your username

Username

[Submit](#) [Cancel](#)

Figure 2.4 – Keystone Account Forgot Password Page

Forgot Username

If you forgot your Keystone Account username, select the “Forgot Username” link on the COPOS login screen (**Figure 2.5**). The Keystone Account Forgot Username screen displays (**Figure 2.6**). Enter your Email Address and select the Submit button to start the process. **Note:** Prior to this, you will need to ensure your Keystone Account has your latest e-mail address; otherwise, you will need to contact the Keystone Login Help Desk.



COPOS
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DEPARTMENT OF COMMUNITY & ECONOMIC DEVELOPMENT

* Enter your Keystone Login username and password.

* Username:

* Password:

[Log In](#)

Powered by
PA KEYSTONE LOGIN

[Learn more about Keystone Login](#)

[Forgot Username](#) ←

[Forgot Password](#)

Keystone Login Help Desk
Phone: 877-328-0995
Email: KeystoneLoginSupport@randstadusa.com
Now available: Unlock your Keystone Login account with a one-time passcode. Go to the [Keystone Login portal](#), log in, and select Edit Account to add an email address.

[Register](#)

[Having trouble registering?](#)

Figure 2.5 – COPOS Login Screen - Forgot Username Link

PA KEYSTONE LOGIN

Contact the Keystone Login Help Desk for all questions, concerns and issues with Keystone Login. The help desk is available 24/7.

Forgot Username

Please enter the email address associated with your user account.

Email

Figure 2.6 – Keystone Account Forgot Username Screen

User Account Types

There are three types of COPOS accounts, each serving a unique purpose.

The **Executive Director** has the responsibility of verifying and submitting COPOS Reports or designating a delegate on their behalf to submit each report type. The Executive Director has the ability to edit Organization information, manage COPOS accounts, and edit all COPOS Report data. Each Organization is required to have exactly one Executive Director.

Local Administrators have the ability to edit Organization information, manage COPOS accounts, and edit all COPOS Report data. Local Administrators also have the responsibility to approve new users and maintaining current users by adding or removing user accesses based on user needs. Organizations may have multiple Local Administrator accounts.

User accounts have the ability to edit COPOS Organizational Standards, Report and/or Work Plan data for individual sections as authorized by a Local Administrator or the Executive Director. User accounts DO NOT have the ability to manage COPOS accounts. Organizations may have multiple User accounts.

Edit Users

Local Administrators and the Executive Director have the ability to manage COPOS accounts in their Organization by selecting the **Edit Users** link in the Navigation Menu under **Admin**. The **Edit Users (Figure 2.7)** lists their Users by First Name, Last Name, Email Address, User Type, Last Login Date/Time, Browser, Approved, and Status for all Active and Inactive current COPOS accounts. There is also an option to **Select (Figure 2.7 – 1)** or **Delete (Figure 2.7 – 2)** each COPOS account. Users are also able to **View Deleted/Denied users (Figure 2.7 – 3)**.

Note: Inactive COPOS accounts are displayed with a light red background.

Users										
Options	2	First Name	Last Name	Email Address	User Type	Last Login	Browser	Approved?	Status	
Select	Delete	Agency2	Admin	agency.admin@cso.org	Local Administrator	8/27/2021 10:07:45 AM	Chrome 91	Yes	Active	
Select	Delete	Agency2	ExecDir	agency.ed@cso.org	Executive Director	8/27/2021 1:14:55 PM	Chrome 91	Yes	Active	
Select	Delete	Agency2	User	agency.user@cso.org	User			Yes	Active	
Select	Delete	Agency2	User2	agency.user2@cso.org	Local Administrator	7/28/2021 12:32:42 AM	Chrome 92	No	Inactive	
View Deleted/Denied		3								

Figure 2.7 - Edit Users Utility

Editing User Information

Select the **Select** link (**Figure 2.7 – 1**) to display additional information for a particular COPOS account (**Figure 2.8**). Select the **Edit** link in the User Details footer (**Figure 2.8**) to modify COPOS account information. When you are finished, select **Update** link to save changes or the **Cancel** link to not save changes (**Figure 2.9**). An e-mail will be sent to the user with a table outlining what values have been changed. The agency's Program Specialist is copied on this e-mail to let them know user information has been updated.

Note: Executive Director information can only be changed by a DCED System Administrator.

User Details	
User Name	a2user
First Name	Agency2
Last Name	User
Organization	Community Action Program of Lancaster County ▼
Phone	(717)341-8038
Extension	
Email	c-hlinda@pa.gov
User Type	User ▼
Receive Organizational Emails	<input checked="" type="checkbox"/>
Delegated Access for Submitting These Reports:	
<input type="checkbox"/> Work Plan	
<input checked="" 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	
Edit	

Figure 2.8 – User Details – Edit

User Details	
User Name	a2user
First Name	Agency2
Last Name	User
Organization	Community Action Program of Lancaster County ▼
Phone	(717)341-8038
Extension	
Email	c-hlinda@pa.gov
User Type	User ▼ <i>Please check user permissions after updating</i>
Receive Organizational Emails	<input checked="" type="checkbox"/>
Delegated Access for Submitting These Reports:	
<input type="checkbox"/> Work Plan <input checked="" 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	
Update Cancel	

Figure 2.9 – User Details - Update

Add/Edit Access Permissions - Delegations

Local Administrators and the Executive Director have the ability to modify access permissions for User accounts in order to add or remove access to various sections of the Annual Report, Organizational Standards and Work Plan. The Executive Director has the ability to delegate approval/submission of the agency Annual Report, Organizational Standards, Work Plan, and/or Discretionary Requests. [See the ED Delegation to Local Admins and Users section.](#)

To edit access permissions, select a User account by selecting the **Select** link (Figure 2.7 – 1). Check the box next to **No Access** (Figure 2.10 – 1), **Read Access** (Figure 2.10 – 2), and/or **Write Access** (Figure 2.10 – 3) to set the permission level for the selected report year and after. Selecting **Check All** (Figure 2.10 - 4) will check all checkboxes in the same column to set access levels quickly. Select the **Update** link to save the permission changes. Select the **Cancel** link to not save the changes.

Note: Access permissions only apply to User accounts and the current COPOS Report year selected and future years. To allow provide access to prior reporting year information, the user will need to update those years, as well as the current year.

User Report Permissions			
Part	No Access	Read Access	Write Access
Agency Highlights	1 <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Module 2 Expenditures, Capacity, & Resource	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Module 3	<input type="checkbox"/>	2 <input checked="" type="checkbox"/>	<input type="checkbox"/>
Module 4A Individual & Family Performance Indicators (Quarterly)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Module 4B Individuals & Families Served	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Module 4C Characteristics of Those Served	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 3
Check All	<input type="checkbox"/>	<input type="checkbox"/>	<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			
Update Cancel			

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 type="checkbox"/>	<input checked="" 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 type="checkbox"/>	<input checked="" 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"/>
Grant Delegated Access for this User to Sign any Organizational Standard			<input type="checkbox"/>
Note: User must have full Access to All Organization Standards			
Update Cancel			

User Work Plan Permissions			
Part	No Access	Read Access	Write Access
Agency Work Plan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" 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			
Update Cancel			

Figure 2.10 - Add/Edit Access Permissions

Deleting/Restoring a User

Local Administrators and the Executive Director have the ability to delete any non-Executive Director accounts in their Organization by selecting the user's associated **Delete** link (Figure 2.11 – 2). To view a list of deleted users, select the **View Deleted/Denied** link (Figure 2.11 – 3). To restore a deleted user, select the **Restore** link (Figure 2.12 – 4). Once selected, the View Deleted/Denied link changes to **Hide Deleted/Denied**. Select the link to not show the Denied Users and Deleted Users tables.

Users in the Denied Users table do not have a Restore link as they were denied access to COPOS. If this user should have COPOS access, the user must login again for their information to display in the New User Requests table where a Local Administrator or Executive Director can approve their access.

Users										
Options	2	First Name	Last Name	Email Address	User Type	Last Login	Browser	Approved?	Status	
Select	Delete	Agency2	Admin	agency.admin@cso.org	Local Administrator	8/27/2021 10:07:45 AM	Chrome 91	Yes	Active	
Select	Delete	Agency2	ExecDir	agency.ed@cso.org	Executive Director	8/27/2021 1:14:55 PM	Chrome 91	Yes	Active	
Select	Delete	Agency2	User	agency.user@cso.org	User			Yes	Active	
Select	Delete	Agency2	User2	agency.user2@cso.org	Local Administrator	7/28/2021 12:32:42 AM	Chrome 92	No	Inactive	
View Deleted/Denied		3								

Figure 2.11 – View Deleted/Denied Users

Denied Users					
User Name	First Name	Last Name	Email Address	User Type	
There are no denied users for this organization					
Deleted Users					
	First Name	Last Name	Email Address	User Type	Last Login
<div>Restore</div>	4	Agency2	User	agency.user@cso.org	User

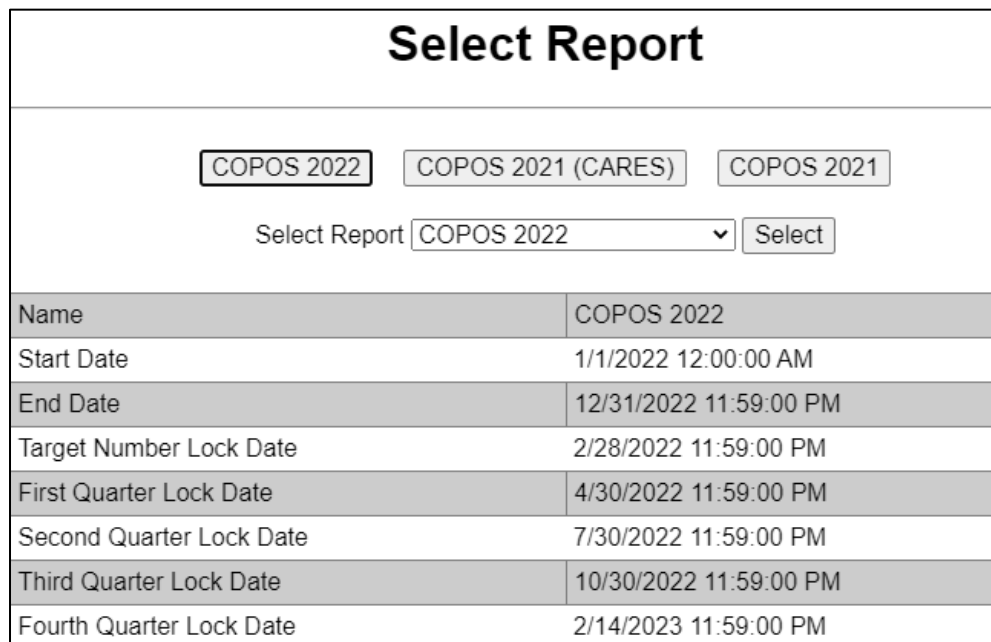
Figure 2.12 – Delete/Restore Users

3. Report Selection

After login, the Select Report page (**Figure 3.1**) displays to choose a COPOS Report year from one of the buttons or the dropdown list (**Figure 3.2**), including CARES funding-specific reports. Select the Enter key to enter the latest COPOS Report year (COPOS 2022 in **Figure 3.1**).

Each COPOS report collects data for the corresponding calendar year. Selecting the **Select** button will display the COPOS Home page and open the selected COPOS Report.

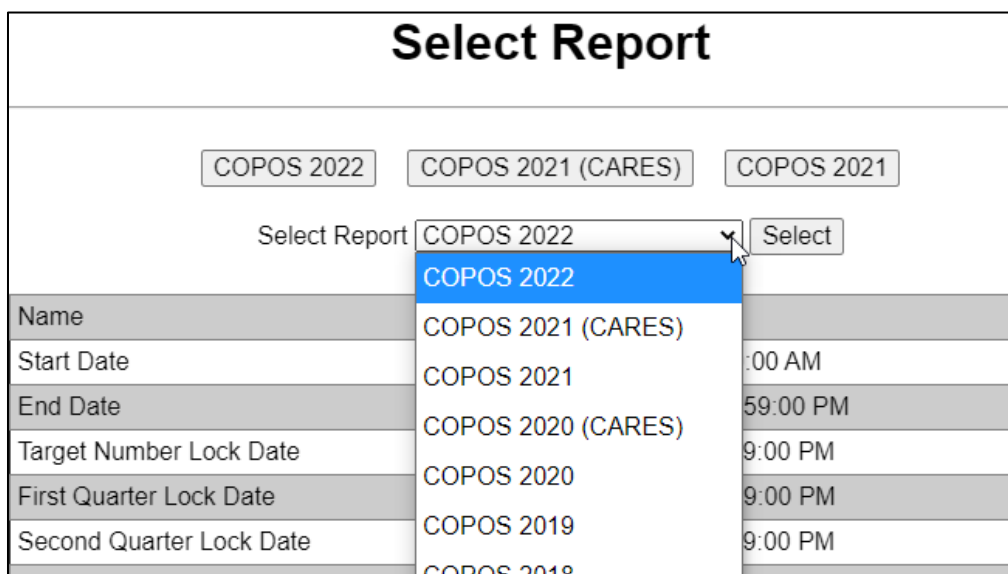
If your login has timed out and you login again within 48 hours, a box displays the name and link to the last screen you were on prior to timing out (**Figure 3.3**). Select the link to return to this page or select the Cancel link to choose a COPOS Report year.



The screenshot shows the 'Select Report' page. At the top, there are three buttons: 'COPOS 2022', 'COPOS 2021 (CARES)', and 'COPOS 2021'. Below these is a 'Select Report' label followed by a dropdown menu currently showing 'COPOS 2022' and a 'Select' button. Below this is a table with report details for COPOS 2022.

Name	COPOS 2022
Start Date	1/1/2022 12:00:00 AM
End Date	12/31/2022 11:59:00 PM
Target Number Lock Date	2/28/2022 11:59:00 PM
First Quarter Lock Date	4/30/2022 11:59:00 PM
Second Quarter Lock Date	7/30/2022 11:59:00 PM
Third Quarter Lock Date	10/30/2022 11:59:00 PM
Fourth Quarter Lock Date	2/14/2023 11:59:00 PM

Figure 3.1 - Select Report Page



This screenshot shows the 'Select Report' page with the dropdown menu open. The dropdown list displays the following options: 'COPOS 2022' (highlighted in blue), 'COPOS 2021 (CARES)', 'COPOS 2021', 'COPOS 2020 (CARES)', 'COPOS 2020', 'COPOS 2019', and 'COPOS 2018'. The table from Figure 3.1 is partially visible behind the dropdown.

Name	COPOS 2022
Start Date	1/1/2022 12:00:00 AM
End Date	12/31/2022 11:59:00 PM
Target Number Lock Date	2/28/2022 11:59:00 PM
First Quarter Lock Date	4/30/2022 11:59:00 PM
Second Quarter Lock Date	7/30/2022 11:59:00 PM

Figure 3.2 - Select Report Dropdown List

Select Report

COPOS 2022

COPOS 2021 (CARES)

COPOS 2021

Select Report

COPOS 2022

▼

Select

Name	COPOS 2022
Start Date	1/1/2022 12:00:00 AM
End Date	12/31/2022 11:59:00 PM
Target Number Lock Date	2/28/2022 11:59:00 PM

First

Select

This

For

×

You were last logged out of COPOS from

[SubContractors](#)
[Click to Resume](#)

Otherwise click Cancel to Continue to Report Selection.

[Cancel](#)

Figure 3.3 – Select Report Timeout Return Option Box

4. System Interface

Navigation Menu

After logging in and selecting a COPOS Report, the Navigation Menu (**Figure 4.1**) displays with options based on your user role. At the top, the name of the logged in user, the selected report, the name of the user's organization display. Select the **Change** link to display the Select Report table where a different report can be selected. Select the **Logout** link to exit COPOS.

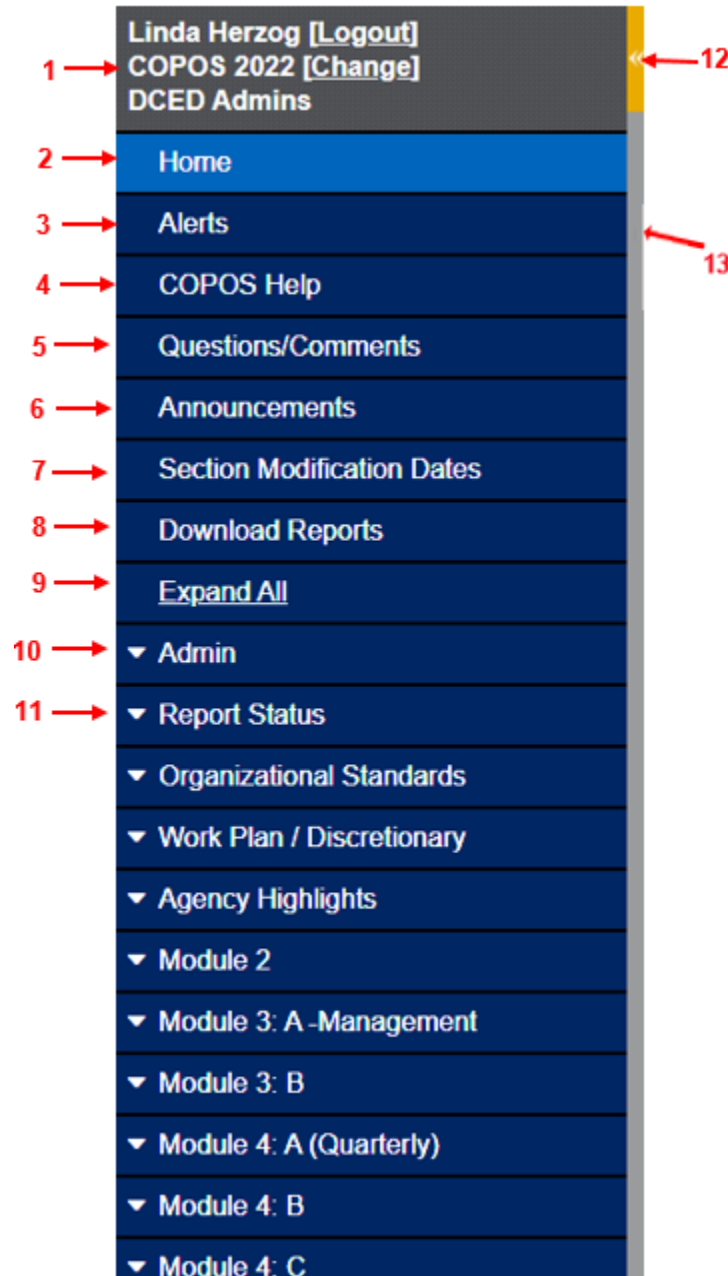


Figure 4.1 – Main Navigation Menu

Figure 4.1 – 2, 4, 5, 6 and 9 show links on the Navigation Menu for a selected report that display for all COPOS users: Home, COPOS Help, Questions/Comments, Announcements, Report Status, and Download.

Additional options display or not display based on user role. DCED System Administrator, Executive Director, and Local Admin menus display all of the options. The menu for Users depends on the Report Modules, Organizational Standards, and the Work Plan access permissions. The **Admin** area is not available to users with the User role. When the white

arrow or the menu option is selected, additional selections display. Select the **Expand All** link to display all of the selections for all of the options. Select the **Collapse All** link to display the menu as shown above.

NOTE: The **Agency Questionnaire** and **Work Plan/Discretionary** options display starting in report year 2022.

Users may change the width of the Navigation Menu by dragging the resize bar (**Figure 4.1 – 13**) or by toggling the open/close arrows (**Figure 4.1 – 12**).

Links with a yellow icon (**Figure 4.2**) identify incomplete Agency Questionnaire, Work Plan or Report sections. Once the section is considered complete by the system, the icon disappears.

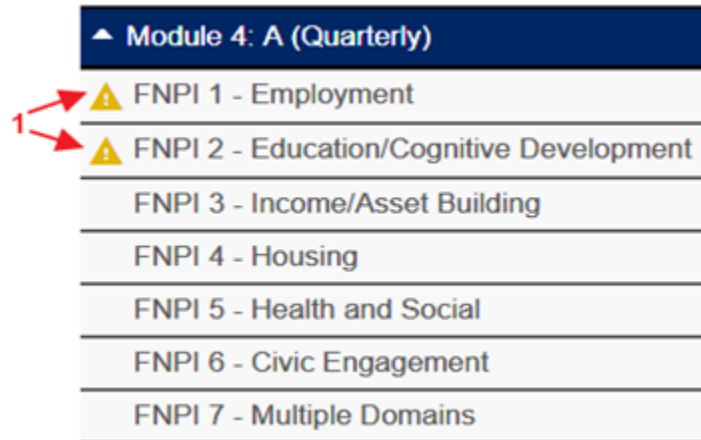


Figure 4.2 - Navigation High-Level Option Expanded

Back to Top Button

All of the lengthier pages in COPOS contain a Back to Top Button (Figure 4.3). After scrolling downward, the shortcut appears on the bottom right corner of the screen, next to the scroll bar. When the button is selected, the top of the page displays.



Figure 4.3 – Shortcut to the Top of the Screen

COPOS System Timeout

If a user lets the logged in COPOS application “sit idle” for 30 minutes, a gray box with red lettering displays. The user must select the gray box or something on the screen for the timeout “clock” to restart. Part of the gray box is always visible and can be selected to view the remaining time or selected to restart the timeout “clock” (**Figure 4.4**).



Figure 4.4 – Timeout Box and Time Remaining

If the user is timed out, the location of the screen they were on is saved and when logging in within 48 hours, the user is able to return to that screen. To return to the user’s last screen, select the link in the message box or to select a report year, select the **Cancel** link (**Figure 4.5**).

The screenshot shows a 'Select Report' interface. At the top, there is a dropdown menu labeled 'Select Report' with 'COPOS 2022' selected and a 'Select' button. Below this is a table with the following data:

Name	COPOS 2022
Start Date	1/1/2022 12:00:00 AM
End Date	12/31/2022 11:59:00 PM
Target Number Lock Date	2/14/2022 11:59:00 PM
First Quarter Lock Date	4/30/2022 11:59:00 PM

A modal dialog box is overlaid on the screen with the following text:

You were last logged out of COPOS from

[WorkPlanStatus](#)
[Click to Resume](#)

Otherwise click Cancel to Continue to Report Selection.
[Cancel](#)

Figure 4.5 – Timeout Return to Last Screen

COPOS Help

Select the **COPOS Help** link (Figure 4.1 – 4) displays the COPOS Help and Information page (Figure 4.6) to access resources to aid in completion of COPOS Reports.

The screenshot shows the 'COPOS Help and Information' page. It contains the following text and links:

If you have any questions or comments regarding COPOS, please complete the [Questions/Comments](#) form.

COPOS Resources
[COPOS User Manual](#)
[Override Instructions](#)

CSBG AR All Resources
[CSBG Training / Technical Assistance Website](#)
[COMM_CSBG_Annual Report V2](#)
[COMM_CSBG_CARES Supplemental Annual Report](#)
[Annotated CSBG Annual Report](#)
[High Level Crosswalk CSBG AR - CSBG IS](#)
[November Release Notes and Reminders 11/20/2018](#)
[CSBG AR Lexicon](#)
[LIHEAP_HS_WIOA_WAP Crosswalk](#)

CSBG AR Module 2 Resources
[Module 2 Excel Document](#)
[Module 2 Instruction Manual - Version 2](#)

CSBG AR Module 3 Resources
[Module 3 Excel Document](#)
[Module 3 Section A - Guide \(Pennsylvania\)](#)
[Module 3 Section B](#)

Figure 4.6 – COPOS Help and Information Screen

Questions/Comments

Select the **Questions/Comments** link (Figure 4.1 – 5) to get assistance with issues encountered in COPOS or to provide system feedback. Your user information and organization will automatically display.

The Questions/Comments page (**Figure 4.7**) provides basic guidance for common issues and provides a way to contact DCED staff. To get assistance with an issue, select a topic from the dropdown list labeled “I need help with”. When the selection changes, a “Suggested Actions to Try” section will appear with guidance related to the selected issue.

If the guidance does not solve the problem or asks to provide details below, enter details then select the Send button. An email is sent to the appropriate staff based on the selected issue.

After sending a Questions/Comments email, a confirmation page displays.

Questions/Comments

We appreciate your feedback, as we constantly strive to improve COPOS!

I need help with:

First Name: Last Name:

Email: Phone Number:

Organization Name:

Provide details on actions taken and problems encountered:

Send

Program Specialist
Melissa Tabb

Local Administrator(s)
Melissa Bozza
Carolyn Adrian
Megan Bair
Stacie Snyder
Agency2 Admin

Figure 4.7 - Questions/Comments Form

5. Home Page

The Home page and dashboard can be accessed at any time by selecting the **Home** link in Navigation Menu. The features on the Home page may change depending on user role, access permissions, reporting period, active overrides, and the report year selected. **Note:** The information provided on the home screen can be downloaded as a PDF by selecting the **Download Dashboard Content as PDF** link under your agency's name at the top of the page.

Hovering your cursor over certain items on the Home page display a **Tooltip (Figure 5.1)**, to provide additional information about the reporting data.

Report Submission Status										
	Target '20	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Target '21	Q1 '21	Q2 '21	Q3 '21	Q4 '21
Due Date	2/14/2020	5/30/2020	7/30/2020	10/30/2020	3/16/2021	5/30/2021	7/30/2021	10/30/2021	2/14/2022	
Submitted	2/13/2020	5/28/2020	7/30/2020	10/28/2020						

All Quarterly Reports are Due on the Submission Date listed above. The system will lock at 11:59 PM on the date provided.

Figure 5.1 – Home Page Dashboard Tool Tip Example

The Executive Director and Local Admins Home Page displays a Needs Attention table that displays any documentation that is past due, board vacancies by section, Org Standards that are not met and require approval, and Org Standards that are not met. Any upcoming due dates may also display.

Needs Attention	
Past Due Items	Questionnaire 1/14
Board Vacancies	0 Low Income 0 Public 0 Private
OS Not Met & Signature Req'd	7.5
Other Not Met OS	1.1 2.2 2.3 3.1 3.2 3.3 3.4 4.1 4.2 4.3 4.6 5.4 5.6 5.9 6.4 6.5 7.1 7.2 7.3 7.6 7.8 7.9 8.7 8.8 9.1 9.2 9.3
Current Due Dates	Work Plan 1/21 COPOS 2021 4th Quarter 2/14 COPOS 2021 (CARES) 6/4

Figure 5.2 – Home Page Dashboard Needs Attention Table – ED-Local Admins

The Agency User Home Page displays a Needs Attention table. By default, only Past Due Items and Current Due Dates display. If the user has been given Org Standard delegation capability, the 2 OS lines display in the table. If the user has been given Work Plan and/or Annual Report delegation capability, those items will display for Current Dates and Past Due Items (if late).

Needs Attention	
Past Due Items	Questionnaire 1/14
Current Due Dates	(none)

Figure 5.3 – Home Page Dashboard Needs Attention Table – Users

Executive Directors, Local Administrators and Users with Write access(es) see **Alerts (Figure 5.2)** on their home page. **Alerts** are shown for recently edited Organizational Standards, Work Plans sent back, or processed, Agency Questionnaires sent back or accepted, Discretionary Funding Requests sent back or processed, and reporting sections sent back and approved. Up to 20 of the most recent active Alerts are displayed on the Home page.

Alerts are worked automatically when the appropriate action is taken. For example, when a Work Plan is submitted (or re-submitted to DCED). Or, if an OS is signed electronically. An alert that is moved to the "Work" items is worked for all users, as there is one alert that shows for all users who can take action on that alert.

Alerts can be marked as **Worked** by selecting the green 'X' icon (**Figure 5.4 - 2**) in that Alert's row. This removes the Alert from Home page Alerts tables. Please keep in mind that selecting the green 'X' to "work" an alert does not update the Organizational Standard, Work Plan issue, or other issue that created the Alert. Note: In the case if an Organizational Standard Alert, Executive Directors must sign the Org Standard to update the status from 'Awaiting ED Approval'. Alerts can be **Hidden** by selecting the red 'X' icon (**Figure 5.4 - 3**). Selecting **My Newest Alerts (Figure 5.4 - 1)** displays all Active Alerts for the user (**Figure 5.5**) and allows viewing Alerts that have been marked as Worked or Hidden.

My Newest Alerts				
Alert	Created Date		Worked	Hide
OS 2.3	11/18/2019	1	X ← 2	X ← 3
OS 2.2	11/18/2019		X	X
OS 2.1	11/18/2019		X	X
OS 1.3	11/18/2019		X	X

Figure 5.4 – Home Page Alerts

My Alerts			
My Active Alerts My Hidden Alerts My Worked Alerts			
My Active Alerts			
Alert	Created Date	Worked	Hide

Figure 5.5 – My Newest Alerts – My Active Alerts

The Submission Status table (**Figure 5.6**) displays Target and Quarterly report due dates and submission dates and statuses for the selected report. The current quarter is indicated by a gray cell (**Figure 5.6 – 1**). The Submitted row uses colors to indicate the reporting status. Green indicates the report was submitted on time, red indicates the report is overdue, and orange indicates the report was submitted late. Reports must be submitted by Due Dates.

Report Submission Status										
	Target '18	Q1 '18	Q2 '18	Q3 '18	Q4 '18	Target '19	Q1 '19	Q2 '19	Q3 '19	Q4 '19
Due Date	2/14/2018	4/30/2018	7/30/2018	10/30/2018	2/14/2019	2/14/2019	4/30/2019	7/30/2019	10/30/2019	2/14/2020
Submitted	2/9/2018	4/27/2018	7/30/2018	10/26/2018	2/14/2019	2/14/2019	4/30/2019			
All Quarterly Reports are Due on the Submission Date listed above. The system will lock at 11:59 PM on the date provided.										

Figure 5.6 – Report Submission Status Table

The Home page displays the Board Vacancy History (**Figure 5.7**). The table displays the status of your Organization's Board for the current month and the past 7 months. Green indicates there are no vacancies. Yellow indicates there are vacancies waiting under 3 months. Orange indicates at least 1 vacancy waiting more than 3 months.

Board Vacancy History								
Sector	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021	Jul 2021	Aug 2021	Sep 2021
Public								
Private	2	1	1	1	1	1	1	1
Low Income								
All Sectors	2	1	1	1	1	1	1	1

Figure 5.7 – Board Vacancy History

Below the Board Vacancy History is a table displaying the Current Status of Organizational Standards (**Figure 5.8**). This table contains a color-coded cell for each Standard, based on the Standard's current status. The Legend below the table provides meaning to the colors. Hovering over a standard displays a tooltip that describes the Standard (**Figure 5.9**). Selecting a Standard cell will open the OS Report page and automatically scroll to that Standard's details.

Organizational Standards - Current Status													
Maximum Feasible Participation													12 of 12
Consumer Input & Involvement	1.1 No Exp.	1.2 05/19/20	1.3 No Exp.										
Community Engagement	2.1 No Exp.	2.2 06/24/19	2.3 No Exp.	2.4 No Exp.									
Community Assessment	3.1 05/03/22	3.2 05/19/20	3.3 06/12/20	3.4 05/19/21	3.5 05/19/20								
Vision and Direction													19 of 20
Organizational Leadership	4.1 05/03/24	4.2 No Exp.	4.3 No Exp.	4.4 06/24/19	4.5 No Exp.	4.6 05/24/20							
Board Governance	5.1 No Exp.	5.2 No Exp.	5.3 05/14/23	5.4 05/24/20	5.5 No Exp.	5.6 11/02/20	5.7 No Exp.	5.8 12/11/20	5.9 No Exp.				
Strategic Planning	6.1 09/21/22	6.2 09/21/22	6.3 09/21/22	6.4 12/15/21	6.5 05/01/20								
Operations and Accountability													25 of 26
Human Resource Management	7.1 01/17/24	7.2 No Exp.	7.3 07/19/23	7.4 09/20/19	7.5 01/24/20	7.6 No Exp.	7.7 No Exp.	7.8 No Exp.	7.9 No Exp.				
Financial Operations & Oversight	8.1 11/15/19	8.2 11/15/19	8.3 01/17/20	8.4 11/15/19	8.5 02/20/24	8.6 11/15/19	8.7 No Exp.	8.8 No Exp.	8.9 08/23/19	8.10 08/23/20	8.11 07/23/20	8.12 No Exp.	8.13 No Exp.
Data & Analysis	9.1 No Exp.	9.2 No Exp.	9.3 06/24/19	9.4									
Legend: ■ Met ■ Expires within 90 days ■ Awaiting ED Approval ■ Not Met ■ Not Applicable													

Figure 5.8 – Organizational Standards – Current Status

Organizational Standards - Current Status													
Maximum Feasible Participation													
Consumer Input & Involvement	1.1 9/30/2022	1.2	1.3										
Community Engagement	2.1 9/30/2022												
Community Assessment	3.1 3/12/2022	3.2 1/4/2022	3.3 1/4/2022	3.4 1/4/2022	3.5 3/12/2022								

Figure 5.9 – Organizational Standards Tooltip Description

Edit Personal Contact Information

To edit your COPOS contact information, select **Edit User Info**. Users are able to modify their phone number and/or email address (**Figure 5.10**). Select the **Update** button to save the changes. It is important to keep all information current as it is used for various COPOS procedures, including e-mail notifications.

Note: The same email address cannot be used for more than one COPOS account.

Jake Smith - System Admin
Edit User Info ^

Phone:

Ext:

Email:

Figure 5.10 – Edit User Info

Reporting Requirements

6. Annual Report Pages

Validation Errors

COPOS includes a variety of validation errors to ensure the integrity of the data and to comply with Federal reporting (OCS) requirements. Data validation occurs immediately after exiting the textbox and when the page is loaded/saved. When the page validates, any errors display in the validation pop-up box (**Figure 6.1**) along with an explanation of each error. The text box containing the invalid data displays with a red background or red border to assist in identifying and correcting the error. Invalid data is temporarily saved, but the report cannot be submitted until all validation errors have been corrected.

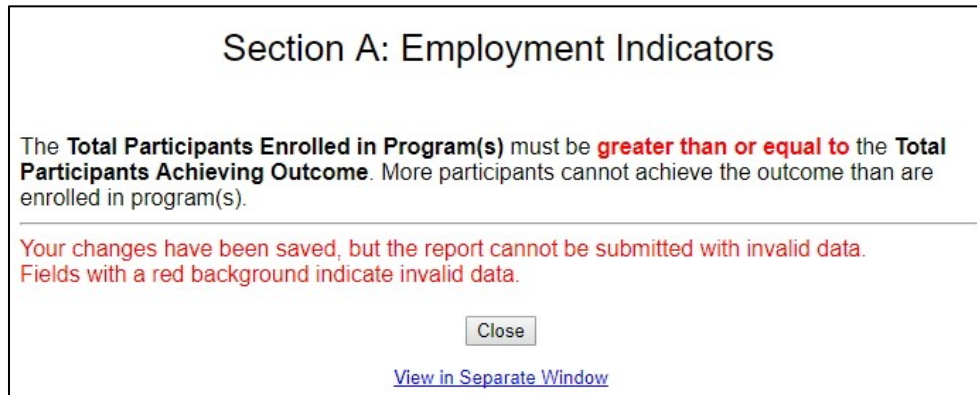


Figure 6.1 - Validation Popup

Helpful links are displayed at the top of each report page (**Figure 6.2 – 4**) and are similar for all report sections. Annual Report pages in COPOS are accessible by selecting the links in the left navigation menu (see [System Interface](#)). Basic instructional information can be viewed by selecting the **Instructions** link (**Figure 6.2 – 3**). Within the pop-box, users are able to select the **User Manual** link to access this document. Report section instructions are also available by selecting the **Printable Help Information** link at the top of each annual reporting page.

To view a printer-friendly version of all help information for the current Section, select the **Printable Help Information** link. To receive an email containing a PDF of the current section, select the **Download Section** link. To view last year's data and this year's data side-by-side, select the **View Previous Year Data** link. To see all notes for the current report Section, select the **View All Notes** link. To see the status of each report section, select **View Report Status**. Note: Other useful links may be included in this Section depending on the content of the page.

The data on the reporting pages is automatically saved as it is entered preventing data loss caused by session timeouts however, the auto-save does **NOT** validate the section. In order for a section to be validated (and considered complete - has no errors), select the **Save** button (**Figure 6.2 – 1**). The **Last saved on** label (**Figure 6.2 – 2**) is updated with the current user name, date, and time. If validation errors exist on the page, the last saved label displays in red text, otherwise, the label displays in black text and displays "Last saved **and validated** on".

For additional guidance on completing a Section, select the **Help** link (**Figure 6.2 – 4**).

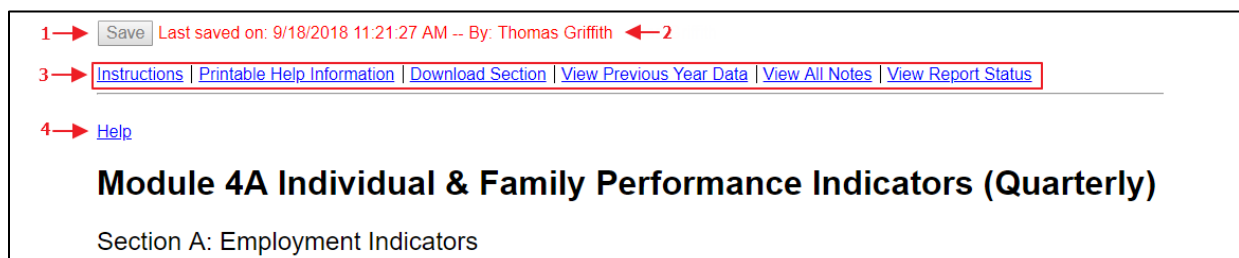


Figure 6.2 - Report Page Header

Report Layouts

There are multiple layouts for reporting data in COPOS. Agency Highlights, Module 3B, and Module 4A each have their own layout to make reporting easier. Module 2 and the rest of Module 4 use a layout similar to the Annual Report. These report types are explained below.

Agency Highlights

The Agency Highlights section is mainly comprised of **narrative questions** as shown in **Figure 6.3**. Each question has a question followed by a text area with a character counter. Questions have different character limits displayed in the bottom left below the text entry area. If a character limit is exceeded, the counter text turns red and the section will not be considered complete when validating with the Save button.

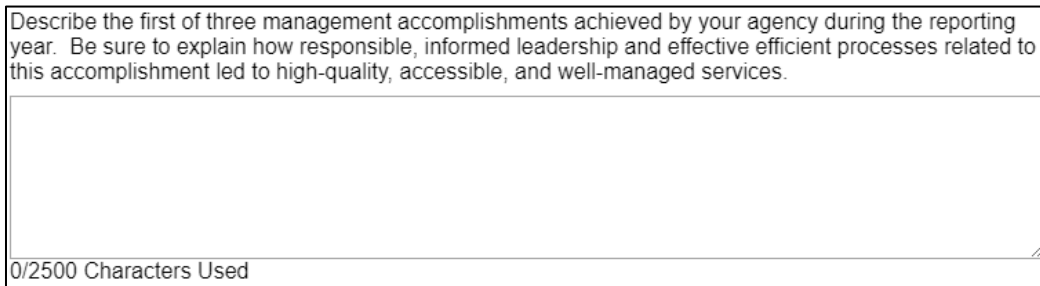


Figure 6.3 - Narrative Question

Module 3B

See Manage Initiatives [Module 3B Reporting](#) for information about this report layout.

Module 4A

The Module 4A layout contains a table for each question. A question table is shown below in **Figures 6.4 and 6.5**. This layout allows all of the quarterly data entry and notes entry on a single screen. The question is displayed in the top left corner. The Target, Enrolled, and Achieving numbers can be entered into the cells in the second and third rows.

Enrolled and Achieving values are year-to-date values and should always be greater than or equal (\geq) to the previous quarter's value. Cells with a light blue background are active and allow data entry while gray cells are disabled and do not allow data entry. Cells change color to specify which reporting quarter the agency is currently reporting.

Note: Auto-Total questions are disabled and will appear gray to indicate that no data entry is required.

FNPI 1b The number of unemployed adults who obtained employment (up to a living wage)				First Quarter	Second Quarter	Third Quarter	Final
			Enrolled	12	24	30	35
▼ Additional Details	Target	20	Achieving	3	10	11	12

Figure 6.4 - Module 4A Question Example

Below the question text, there is an **Additional Details** button. Selecting this button will expand the table to reveal helpful data and notes entry text areas as shown in **Figure 6.5**. Notes and Year-to-Year Notes can be entered for these questions. During validations, Notes may be required to be entered. The Additional Details wording displays in red if a note is required.

Selecting the button again collapses the table and hides the Additional Details information.

FNPI 1b The number of unemployed adults who obtained employment (up to a living wage)			First Quarter	Second Quarter	Third Quarter	Final
		Enrolled	13	25	33	39
Additional Details	Target	20	Achieving	6	12	14
Last Year's 2nd Quarter Achieving		12	Last Year's 4th Quarter Achieving		20	
2nd Quarter Year-To-Year Variance		0%	4th Quarter Year-To-Year Variance		-15%	
4th Quarter Total / Participants Enrolled = % Achieving		43.59%	4th Quarter Total / Target = % Accuracy		85.00%	
Notes: Explain variance in Expected Versus Actual Achieving						
Enter target variance notes here...						
YTY Notes: Explain 4th Quarter Year-To-Year variance of -75% or +300%						
Enter year-to-year notes here...						
Living Wage Definition Help						
200% of the Federal Poverty Guidelines.						

Figure 6.5 - Module 4A Question Expanded

The Notes section allows a user to enter notes for Target accuracy, Year-To-Year variance, and, in certain cases, Living Wage Definitions. If a note of a specific type is required, red text will appear above the text area stating it is required and will disappear once a note is entered. If a note is entered for a question, a notes icon (📝) appears beside “Additional Details”.

Note: The Living Wage Definition is shared between all Module 4A and Module 3B Living Wage Definition text areas. Therefore, a definition only needs to be entered once to meet all Living Wage Definition notes requirements and updating the definition will update all instances.

Module 4A – FNPI Other Indicators

Selecting the Other Indicator plus icon, adds another Other Indicator for entry of a description and related numbers. Each FNPI is able to have 1 to 7 Other Indicators. These “Additional Indicators” will generally be added within the Work Plan section.

Other Employment Outcome Indicator				
FNPI 1z1 The number of individuals The number of unduplicated individuals who obtained employment skills.			First Quarter	
		Enrolled	696	
Additional Details	Target	978	Achieving	268
+				

Figure 6.6 – Module 4A – FNPI Other Indicator – Plus Icon

Module 4A Validation

Values are saved when entered into the question table and basic validation is completed based on that value. The Save button must be selected to validate the entire page. If a red error appears, the numbers must be corrected to clear the error. If a yellow warning appears, an Additional Details Note and/or Year-to-Year note is required before the page is considered valid (the yellow warnings do not disappear). Mouse over the cell containing the error to get more information in a tooltip (Figure 6.7). For more information about data validation, see [Report Validation](#). The section is considered complete when no errors occur.

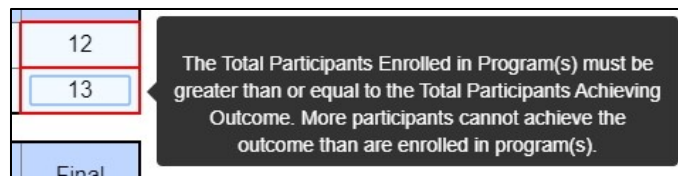


Figure 6.7 - Validation Error Tooltip

Fourth Quarter Only Layout

Information for Modules 2, 4B and 4C are entered for fourth quarter only and use a layout similar to the Annual report as shown in **Figure 6.8**. Additional Details is available to enter a Note and/or Year-to-Year Variance information to reconcile a yellow block warning. A **Help** link also appears in this column if a question has help information. In the right column, text boxes are available for data entry as well as displaying validation information.

Section B: CSBG Eligible Entity Capacity Building - Data Entry Form		Final
B.2. Hours of Agency Capacity Building (e.g. training, planning, assessment):		
B 2a. Hours of Board Members in capacity building activities		
^ Additional Details		76
Year to Year Variance:	322.22%	Previous Year's Value: 18
Notes: Explain why value is outside the defined parameters <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>		
Year-To-Year Variance Notes Required YTY Notes: Explain Year-To-Year variance <div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"></div>		

Figure 6.8 - Fourth Quarter Only Layout

Report Validation

This section describes the different types of COPOS Report validations.

Performance Target Accuracy

Report Tables containing target data also contain data on the percentage of participants who are Achieving outcome compared to the Target achieving. This percentage is calculated using the equation in **Figure 6.9**. The calculation represents how accurately an Agency was able to predict their outcomes in a given year. An explanation is required if the actual outcome is less than 80% or more than 120% of the target, in which case the text box will be highlighted with a yellow background. A Section is incomplete until all Performance Target Accuracy fields requiring explanations have a note.

$$\left\{ \frac{(\text{Actual Results} - \text{Baseline})}{(\text{Target} - \text{Baseline})} \right\}$$

Figure 6.9 - Performance Target Accuracy Calculation

Year-to-Year Variance

Year-to-Year Variance indicates the percentage a Report question has changed from the previous report year to the current report year. Year-to-Year Variance is calculated using the equation in **Figure 6.10**. An explanation is required for variances of less than or equal to -50% or greater than or equal to +200% (prior to 2020, the range was -75% and +300%). A variance of “∞%” (Infinity Percent) signifies prior year data has a value of zero and requires an explanation. A section cannot be closed unless all Year-to-Year Variance explanations have been provided in a question’s Additional Details.

$$\left\{ \frac{(\text{current year data} - \text{prior year data})}{\text{prior year data}} \right\} \times 100\%$$

Figure 6.10 – Year-to-Year Variance Calculation

To view a side-by-side comparison of previous year data and current year data, select the “View Previous Year Data” link (**Figure 6.2 – 3**). As shown in **Figure 6.11**, the first column contains the Indicator text and an Additional Details button, which will display a text area to enter an explanation. The second column contains the previous year data, and the third column contains the current year data. The fourth column contains the auto-calculated fields “Yearly Change” and “% Change”.

To view this table as a pop-up, select the **View in Separate Window** link above the report table. To return to the report page, select the **View Current Year Data** link at the top of the page.

Section B: CSBG Eligible Entity Capacity Building - Data Entry Form	COPOS 2019	COPOS 2020	Variance Data
B.2. Hours of Agency Capacity Building (e.g. training, planning, assessment):			
B.2a. Hours of Board Members in capacity building activities	33	29	Yearly Change -4 % Change -12.12%
<div> <div> Additional Details </div> </div>			
B.2b. Hours of Agency Staff in capacity building activities	301	1815	Yearly Change 1514 % Change 502.99%
<div> <div> Additional Details </div> </div>			
YTY Variance Note for COPOS 2020: Hours that went toward the Community Needs Assessment (which only comes around every three years), planned reorganization via the CSBG-Discretionary grant that was specifically focused on integrating Service Navigation, time spent in emergency reorganization in response to COVID and the establishment of greater community outreach in Community Impact.			

Figure 6.11 - Prior Year Data vs. Current Year Data Comparison

7. Module 3 – Community-Level Initiatives

Access Module 3 initiative information by selecting **Module 3: A – Management** or **Module 3: B (Figure 7.1)** in the left navigation menu. To create, edit, or view details about the agency's Community Level Initiatives, select the **Manage Community Initiatives** link (**Figure 7.1 – 1**). The **Search Community Initiatives** link (**Figure 7.1 – 2**) provides numerous ways to search for and find initiative information (details are provided later in this section). This page is useful if your Organization has many Community Level Initiatives.

To report on an Initiative's Outcomes/Indicators, select its **Module 3: B (Figure 7.1 – 3)** link. These links display once an Initiative's details have been completed using the Manage Initiatives page. These links correspond to Community Initiative names provided by the agency. Yellow triangles next to a link indicate an Initiative's Module 3B report is incomplete or has validation issues.

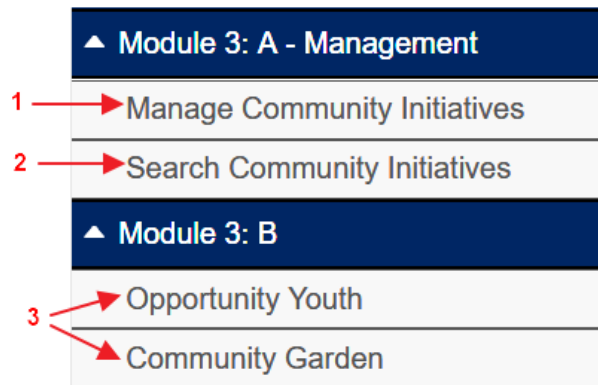


Figure 7.1 - Module 3 Navigation Menu Items

Manage Initiatives

The **Manage Initiatives** page is used to enter/edit details about your Organization's Community Level Initiatives. Once an Initiative has been created, it displays in the Community Initiatives table shown in **Figure 7.2**. To enter a new Initiative, select the **New Initiative** link located below the table. To view an Initiative's details, select the **View** link. To edit an Initiative's details, select the **Edit** link (**Figure 7.2**). Select the **Report** link to report numbers for an Initiative's selected Outcomes/Indicators (**Figure 7.5**). Selecting the **Download PDF** link sends a PDF containing the corresponding Initiative's details and Module 3B report to the email address associated with your COPOS account.

Community Initiatives					Current Year	Status	Valid	Do Not Report
View	Edit	Report	Download PDF	Opportunity Youth	3	Active	Yes	<input type="checkbox"/>
View	Edit	Report	Download PDF	Community Garden	3	Active	Yes	<input type="checkbox"/>
View	Edit	Report	Download PDF	Teen Parenting: Playing for Keeps (Pilot Project)	3	Active	No	<input type="checkbox"/>
New Initiative								
View Deleted Initiatives								

Figure 7.2 - Managing Initiatives

The **Current Year** is shown in the table for each Initiative. This is measured from the year the Initiative began, to the most recent report year the Initiative is active. Each Initiative's **Status** is displayed. The **validity** of each Initiative is displayed to help quickly identify invalid Initiative data. The **Do Not Report** checkbox will be checked for an initiative if DCED has indicated that this report is not ready for reporting at this time. Details and outcomes can still be entered for an initiative if it is marked as **Do Not Report**; however, it will not be reported to NASCSP with other Fourth Quarter data.

To view (or restore) Initiatives that have been deleted, select the **View Deleted Initiatives** link below the Initiative's table.

Note: These may be completed anytime up to report submission.

Editing Initiatives

Entering Initiative Details is done using the Initiative Details form (**Figure 7.3**) on the Manage Initiatives page. Initiative Details are automatically saved and can be saved/validated at any time by selecting the **Save** button (**Figure 7.3 – 1**). The label (**Figure 7.3 – 2**) next to the **Save** button indicates the status of the Initiative's Details (which need to be completed before Module 3B reporting can occur). After selecting the **Save** button, red warnings (**Figure 7.3 – 4**) may display throughout the Initiative Details form to indicate any missing or inconsistent information.

The screenshot displays the 'Initiative Details' form. At the top, a 'Save' button is highlighted with a red arrow labeled '1'. To its right, a red message states: 'Last saved by Thomas Griffith on 10/17/2018 3:07:12 PM. Initiative details are not validated, please ensure all red errors have been addressed, then click the 'Save' button to validate the initiative details.' A red arrow labeled '2' points to this message. Below the message is a 'Do Not Report' checkbox. The form is divided into four sections: 1. Initiative Name (containing 'Emergency Housing Program for Ex-Offenders' and '42/100 Characters Used'), 2. Project Year (containing 'Start Date (MM/DD/YYYY): 9/14/2016' and 'Project Year: 3'), 3. Problem Identification (containing '0/1000 Characters Used' and a red error message '*You must enter a Problem Identification.'), and 4. Goal/Agenda (containing '0/1000 Characters Used' and a red error message '*You must enter a Goal'). Red arrows labeled '3' and '4' point to the error messages in sections 3 and 4, respectively.

Figure 7.3 - Editing Initiatives

Narrative questions have a maximum character count displayed below the text area (**Figure 7.3 - 3**). As you type, the counter updates the number of characters entered. If the maximum allowed characters is exceeded, the text turns red and the question will be considered invalid until the character count is reduced.

The Initiative Details Form makes use of accordion controls (**Figure 7.4**). Each accordion has a 'pane' for each category of Indicators and Strategies. Selecting one of the blue category headers (**Figure 7.4- 1**) expands the pane, allowing you to select associated items. Both the accordion shown in **Figure 7.4** and the accordion used to select Initiative Strategies allow entering of 'Other' items (**Figure 7.4 – 2**) if the items shown are not adequate.

Note: Categories with at least one selected will have a checkmark next to the category name (**Figure 7.4 – 3**).

For more information on the specific parts of the Initiative Details form, see the "CSBG AR Resources" on the COPOS Help page.

6. Ultimate Expected Outcome
[Help](#)

✓ **Employment Indicators** -

☐ CNPI 1a. Number of jobs created to increase opportunities for people with low incomes in the identified community.

☐ CNPI 1b. Number of job opportunities maintained in the identified community.

☐ CNPI 1c. Number of "living wage" jobs created in the identified community*.

☐ CNPI 1d. Number of "living wage" jobs maintained in the identified community*.

☐ CNPI 1e. Number of jobs created in the identified community with a benefit package.

☐ CNPI 1f. Percent decrease of the unemployment rate.

☐ CNPI 1g. Percent decrease of the youth unemployment rate.

☐ CNPI 1h. Percent decrease of the underemployment rate.

☒ Other

Counts of change:

CNPI 1z.1

CNPI 1z.2

CNPI 1z.3

Rates of change:

CNPI 1z.4

CNPI 1z.5

CNPI 1z.6

Education and Cognitive Development Indicators +

✓ **Infrastructure and Asset Building Indicators** +

Housing Indicators +

Health and Social/Behavioral Development Indicators +

✓ **Civic Engagement and Community Involvement Indicators- Goal 2** +

✓ **Civic Engagement and Community Involvement Indicators- Goal 3** +

Community Support Indicators +

Emergency Management Indicators +

Figure 7.4 - The Indicator Accordion, found in the Initiative Details form

Module 3: B Reporting

Once an Initiative's indicators are selected in number 14 of the Initiative Details form (**Figure 7.5**), the related Module 3: B Report (**Figure 7.6**) is available. This report is used to enter numbers for an Initiative's Target, Actual, and Baseline Rates of Change and Counts of Change. Selecting the **Edit Indicators** link at the top of the page displays the Manage Initiatives page with the Initiative Details form open for this Initiative, allowing the user to change the Initiative's selected indicators.

Note: Once an Initiative's indicator is reported, it may not be removed from number 6 in a future year.

After the Copy Over process (described later) has been completed, each agency may complete their new report year data by setting targets in Module 3 B.

14. Outcomes/Indicators to Report (For This Report Year)
[Help](#)

Employment Indicators
Education and Cognitive Development Indicators
✓Infrastructure and Asset Building Indicators
<input type="checkbox"/> CNPI 3a.2. Number of new accessible assets/resources created in the identified community: Financial
Housing Indicators
Health and Social/Behavioral Development Indicators
Civic Engagement and Community Involvement Indicators- Goal 2
Civic Engagement and Community Involvement Indicators- Goal 3
Community Support Indicators
Emergency Management Indicators

Figure 7.5 – Community Initiative Number 14

White text boxes indicate that user-entered information is required. Grey textboxes are auto-calculated based on user-entered data. If a Performance Target Accuracy text box is not within the acceptable range of percentages (-80% to +120%), the box turns yellow and the **Additional Details** button text becomes red to indicate a note is required.

Performance Target Accuracy is calculated as shown in **Figure 7.7**. The Expected Change From Baseline is calculated as shown in **Figure 7.8**, and the Actual Change From Baseline as shown in **Figure 7.9**. Any text box that turns red indicates a Validation Error. Hovering over a red textbox provides a tooltip describing the Validation Error.

To enter a note, select the **Additional Details** button to display the Notes text area (**Figure 7.6**). Once a note is entered, a note icon (📝) displays on the **Additional Details** button and the text returns to the normal color.

Additional notes relating to all Indicators in the domain can be entered into the General Comments text area. If an indicator in the domain relates to living wage, then a Living Wage Definition text area is displayed above the General Comments text area.

Select the **Save** button at any time to save the information on this page. Selecting the **Save** button validates the section and provides feedback in a pop-up box similar to Modules 2 and 4.

Faith Alliance for Revitalization (FAR)

Infrastructure and Asset Building Indicators

Counts of Change for Infrastructure and Asset Building Indicators	Identified Community	Target	Actual Results	Performance Target Accuracy (%)
CNPI 3b.1. Number of existing assets/resources made accessible to the identified community: Commercial	City	10	10	100.00%
<div style="display: flex; align-items: center;"> ▼ Additional Details <div style="border: 1px solid black; flex-grow: 1; padding: 5px; margin-left: 5px;"> <div style="font-size: 0.8em; margin-bottom: 5px;">General Comments:</div> <div style="font-size: 0.8em;">The committee has identified resources and made them available to the community</div> </div> </div>				

Figure 7.6 - Module 3: B Report

$$\left\{ \frac{(\text{Actual Results} - \text{Baseline})}{(\text{Target} - \text{Baseline})} \right\}$$

Figure 7.7 - Performance Target Accuracy Calculation

$$\left\{ \frac{(\text{Target} - \text{Baseline})}{(\text{Baseline})} \right\}$$

Figure 7.8 - Expected Change from Baseline Calculation

$$\left\{ \frac{(\text{Actual Results} - \text{Baseline})}{(\text{Baseline})} \right\}$$

Figure 7.9 - Actual Change from Baseline Calculation

Search Initiatives

The Search Initiatives page can be used to search your Organization's **Community-Level Initiatives** based on various criteria.

To do a **Keyword Search**, use the dropdown list (**Figure 7.9 - 1**) to select an initiative name, problem, or goal. When the Search button (**Figure 7.9 - 10**) is selected, Initiatives with a name, problem, or goal that matches the keyword entered in the textbox (**Figure 7.9 - 1**) are listed in the search results. The search text is highlighted in yellow. If you do not want to perform a keyword search, leave the text box blank.

Initiatives can also be searched using various filters (**Figure 7.9 - 2-7**). Selecting a check box in this section allows the user to enter information to filter the search results based on various search criteria (shown on this and the next page):

Item 2. For non-agency user: Only Initiatives belonging to the selected agency are listed in the search results. You will only be able to search for Initiatives that belong to your agency.

Item 3. Only Initiatives that fall under the selected CSBG Community Domain are listed in the search results.

Item 4. Only Initiatives with partners of the selected type are listed in the search results. Users may also enter a keyword to search for specific partners.

The screenshot shows a 'Search Criteria' form with the following elements and numbered annotations:

- 1** points to the 'Search By' dropdown menu, which is set to 'Initiative Name'.
- 2** points to the 'Search Text' input field.
- 3** points to the 'Filter by Agency' checkbox, which is checked.
- 4** points to the 'Community Action, Inc.' dropdown menu.
- 5** points to the 'Filter by CSBG Community Domain' checkbox, which is checked.
- 6** points to the 'Employment' dropdown menu.
- 7** points to the 'Filter by Partner Type/Partner Name' checkbox, which is checked.
- 8** points to the 'Partner Type' dropdown menu, which is set to 'Educational Institutions'.
- 9** points to the 'Partner Name' input field.
- 10** points to the 'Filter by Status' checkbox, which is checked.
- 11** points to the 'Status' dropdown menu, which is set to 'Initiative Active'.
- 12** points to the 'Filter By Strategy' checkbox, which is checked.
- 13** points to the 'Strategy Type' dropdown menu, which is set to 'Employment Strategies'.
- 14** points to the 'Strategy' input field.
- 15** points to the 'Filter by Initiative Start Date' checkbox, which is checked.
- 16** points to the 'Initiative Start Date Between:' section, which includes two calendar icons and input fields.
- 17** points to the 'Show Data For:' dropdown menu, which is set to 'COPOS 2018'.
- 18** points to the 'Number of Results to Display Per Page:' dropdown menu, which is set to '10'.
- 19** points to the 'Search' button.

Figure 7.9 - Search Initiatives Criteria

Item 5. Only Initiatives with the selected status are listed in the search results.

Item 6. Only Initiatives with the selected Strategy Type are listed in the search results. Enter a Strategy keyword to narrow the search results.

Item 7. Use the calendar icon or enter a date range for when an Initiative started.

Item 8. Only Initiatives active in the selected report year are shown. The selected report year also affects how the data is displayed in the search results.

Item 9. Initially up to 10 items display in the search results. Select the Number of Results to Display Per Page dropdown to select a higher number to display.

Item 10. One or multiple search selections may be used. Select the Search button to initiate the Initiative search. Results display below the Search Criteria box.

If Initiatives are found based on the search criteria, an **Export to Excel** button displays. Selecting this button displays the information in the search results in a Microsoft Excel file.

Year-to-Year Copy-Over Process for Initiatives

At the beginning of each year, active Initiatives are copied from the previous report. **Figure 7.10** displays the descriptions of the data copied from one year to the next and what data can be edited. **DCED sets the Copy Over date and all Initiative data must be entered by that date.**

Following the copy over, any initiative requiring changes to Module 3A questions 1 – 11 must be manually updated by the agency *in the previous and current Report years.*

Note: Only Initiatives with **Initiative Active** selected for #15 “Final Status” are copied over to the next report year.

After the Copy Over has been completed, each agency should complete their new report year data by answering questions 12 – 16 in Module 3 A and setting targets in Module 3 B.

Module 3 Copy Over Information			
Question Number	Copy?	Edit?	Notes & Information
#1 Initiative Name	Yes	No	The Initiative Name will be maintained throughout the project to allow report matching in subsequent years on the OLDC database.
#2 Project Year	Calculated Value	No	The Start Date is based on when you originally began the project. It is copied and not editable. Project year is a calculated value.
#3 Problem Identification	Yes	Yes	The problem initially identified would not change. However, you may have additional insight into the project which can be updated each year.
#4 Goal / Agenda	Yes	Yes	The Goal is for the life of the project. However, you may wish to provide additional goals that align with this project which are necessary to fully complete this project.
#5 Issue / CSBG Community Domains	Yes	Yes	During the project, you may need to provide additional Domains which were not initially considered within the original project scope. Domains may be removed if project scope has changed. Keep in mind, however, that Domains are for the entire project and should not be removed simply because they were completed within a prior year of the project.
#6 Ultimate Expected Outcomes	Yes	Yes	During the project, you may be able to provide additional Outcomes which were not initially considered within the original project scope. Outcomes are for the entire project and will not be removed simply because it was completed during a prior year.
#7 Identified Community	Yes	Yes	During an Initiatives you may find it advantageous to expand the community or even focus it as a project progresses. The Identified Community will generally remain the same, as it is based on the largest area impacted throughout the life of the project.
#8 Expected Duration	Yes	Yes	Both fields are editable as a project may expand in duration.
#9 Partnership Type	Yes	Yes	Generally, this will remain the same. However, an Independent CAA Initiative may take on partners and require update.
#10 Partners	Yes	Yes	Partnerships may grow throughout the life of a project. If a partnership ends, this partner may remain simply based on their prior year input to this Initiative.
#11 Strategy(ies)	Yes	Yes	These fields are editable as you may need to add or change strategies during a project. Strategies completed in 2018 should remain on the Initiative for all reporting years.
#12 Progress on Outcomes / Indicators	No	Yes	Outcome Progress is specific to the year reported. It is possible that any year in the project may be a planning year in which no outcomes will be reported. This should be

			manually updated at the beginning of each year after the copy over has occurred.
#13 Impact of Outcomes	No	Yes	This is year specific to summarize the impact which will be made each calendar year.
#14 Outcomes / Indicators to Report	No	Yes	Outcomes to be accomplished this year should be updated at the beginning of each year and updated accordingly.
#15 Final Status	No	Yes	Only "Initiative Active" initiatives are copied over. This status must be updated to one of the "ended" statuses once the Initiative has ended.
#16 Lessons Learned	No	Yes	Each year has its own lessons learned on this Initiative.

Figure 7.10 – Module 3 Copy Over Information

8. Agency Information

Local Administrators and the Executive Director may edit their Organization's information by selecting **Admin** then **Edit Organization & Monitor Details** in the left navigation menu. Select the **Organization Details** tab to view and update the Agency address, service counties, web address, phone number, and number of their board members by sector should be kept up-to-date here. The latest Contract Number and Contract Start and End Dates (**Figure 8.2**) need to be regularly reviewed and updated as needed. When changes are made, select the **Save** button.

Edit Organization Information	
Organization Details	
Organization Name	Central Susquehanna Opportunities, Inc. *
Address	2 East Arch Street *
Address 2	
City	Shamokin *
State	PA *
Zip	17872 * -
Counties	<input type="checkbox"/> Adams <input type="checkbox"/> Chester <input type="checkbox"/> Franklin <input type="checkbox"/> McKean <input type="checkbox"/> Somerset <input type="checkbox"/> Allegheny <input type="checkbox"/> City Of Pittsburgh <input type="checkbox"/> Fulton <input type="checkbox"/> Mercer <input type="checkbox"/> Statewide <input type="checkbox"/> Armstrong <input type="checkbox"/> Clarion <input type="checkbox"/> Greene <input type="checkbox"/> Mifflin <input type="checkbox"/> Sullivan <input type="checkbox"/> Beaver <input type="checkbox"/> Clearfield <input type="checkbox"/> Huntingdon <input type="checkbox"/> Monroe <input type="checkbox"/> Susquehanna <input type="checkbox"/> Bedford <input type="checkbox"/> Clinton <input type="checkbox"/> Indiana <input type="checkbox"/> Montgomery <input type="checkbox"/> Tioga <input type="checkbox"/> Berks <input checked="" type="checkbox"/> Columbia <input type="checkbox"/> Jefferson <input checked="" type="checkbox"/> Montour <input type="checkbox"/> Union <input type="checkbox"/> Blair <input type="checkbox"/> Crawford <input type="checkbox"/> Juniata <input type="checkbox"/> Northampton <input type="checkbox"/> Venango <input type="checkbox"/> Bradford <input type="checkbox"/> Cumberland <input type="checkbox"/> Lackawanna <input checked="" type="checkbox"/> Northumberland <input type="checkbox"/> Warren

Figure 8.1 - Edit Organization Information

Contract Number	C000067067 *
Contract Start/End Dates	01/01/2018 * to 12/31/2022 *

Figure 8.2 - Edit Organization – Contract Information

Additional Organization Information

System Administrators have the ability to set specific information for an Organization. This includes the contract information and setting the main and backup Program Specialists (**Figure 8.3**). Their name, e-mail address and phone display for each.

Program Specialist	Melissa Tabb Email:mtabb@pa.gov Phone:+1 (717) 425-7598
Backup Program Specialist	- Unset -

Figure 8.3 - Additional Organization Information

Board Management

Local Administrators and the Executive Director may edit their Organization's **Board and Key Staff** information by selecting **Admin** then **Manage Board, Staff, Subcontracts**. The Executive Director needs to approve this information.

The Board Management tab (**Figure 8.4**) displays the status, by Sector, for the current month and 11 previous months in the Board Vacancy History table. If missing members, the number missing displays and the cell displays as yellow (missing under 3 months) or red (missing over 3 months). Board member names for each Sector are displayed in corresponding table.

Note: The number of board members established in bylaws must be set in the Organization Details before this tab can be accessed.

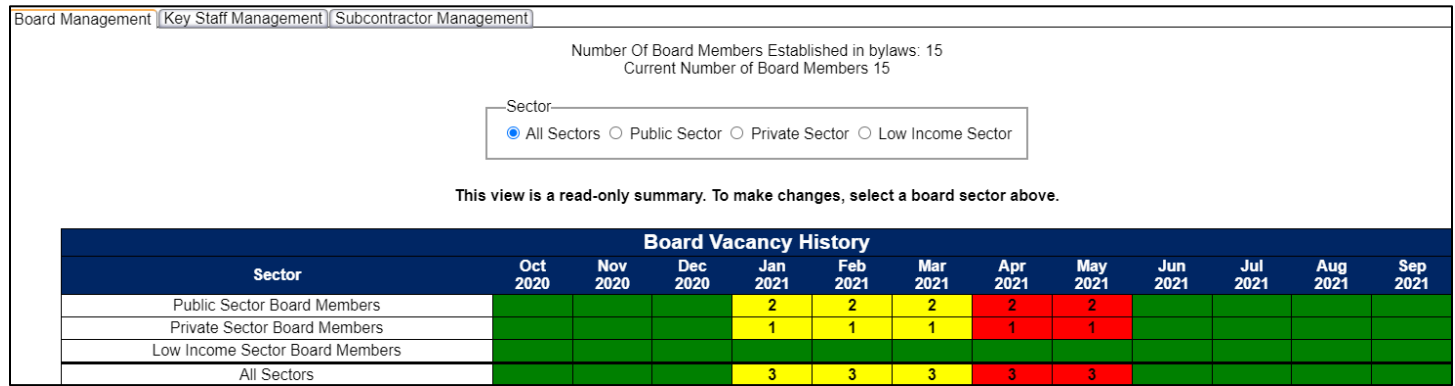


Figure 8.4 - Board Management Tab

Select a Sector radio button to view board member information for a specific Sector. With a specific sector selected, the user may choose the **Select** link (Figure 8.5 - 1) to view/edit the board member's details (Figure 8.6). Selecting the **Delete** link (Figure 8.5 - 2) allows the board member to be removed from the selected Sector. If a board member is deleted, they display in the **Deleted Board Members** table (Figure 8.7) and can be viewed by selecting the **View Deleted** link (Figure 8.5- 3). A deleted board member can be returned to their Sector table by selecting the **Restore** link (Figures 8.7 and 8.8).

Note: Board Member information is “read-only” while viewing All Sectors; a specific Sector must be selected to edit Board Member information.



Figure 8.5 - Board Sector View

Choosing **Select** next to a name opens up the **Board Member Details** table for the selected board member. Not all information is required, but the First Name, Last Name, Board Start Date, and Sector are required. Phone Number and Email are required for the Board President/Chair. Selecting the **Edit** link (Figure 8.6 - 1) allows the user to make changes to the information for the currently selected board member. Select the **Update** link to save the changes or the **Cancel** link to keep the original information and close the panel.

Selecting the **New** link (Figures 8.5 and 8.6 - 2) opens a blank Board Member Details panel to allow the user to enter information for a new board member. After information is entered, select the **Insert** link to save the new member into the Sector member table. Select the **Cancel** link to discard the information. **Note:** A new board member cannot be added to a Sector if the number of board members in the Sector equals the Bylaw number for the Sector.

Board Member Details	
First Name:	Wayne
Middle Initial:	
Last Name:	Brosius
Suffix:	
Board Start Date:	5/17/2018
Title:	Comissioner
Board Position:	
Committees:	
Phone Number:	
Email:	
Term Length:	Start Date: 1/1/2016
	End Date:
Sector:	Public Sector ?
Representative First Name:	
Representative Last Name:	
Geographic Area Represented:	
Organization: 1	County Court
Edit New 2	

Figure 8.6 - Board Member Details

The **Deleted Board Members** table contains the information of former board members. After the **View Deleted** link has been selected, select the **Hide Deleted** link (Figure 8.7 - 2) to hide the Deleted Board Members table.

Deleted Board Members			
	First Name	Last Name	Board Position
Restore	Donna	Oberlander	
Restore	Richard	Beck	
New Hide Deleted 2			

Figure 8.7 - Deleted Board Members

Selecting the **Restore** link (Figure 8.7 - 1) for a deleted board member displays a pop-up box (Figure 8.8). Only sectors with vacant seats will be selectable (Figure 8.8 - 1). Select the **Restore** button (Figure 8.8 - 2) to restore the board member to the selected sector and remove them from the Deleted Board Members table. **Note:** Deleting or restoring a board member sends an email to the organization informing them of the change.

Please choose the sector to restore this board member. A board member may only be restored to a sector with a vacant position.

1 → Sector: - Select -

2 → [Restore](#) [Cancel](#)

Figure 8.8 - Restore Popup

Key Staff Tab

The **Key Staff Management** tab (Figure 8.9) is accessible by selecting **Admin** then **Manage Board, Staff, Subcontractors** in the left navigation menu. It is very similar to Board Management. Key Staff Management is used to store up-to-date information about the four (4) key staff in the organization with the largest CSBG roles. No more than four (4) key staff may be entered. The agency Executive Director must approve this information.

The name, title, CSBG Role, and phone number for each key staff is shown in the **Key Staff** table (Figure 8.9). To edit this information, choose a person's **Select** link (Figure 8.9 - 1). For the head of the board, these are the valid entries that can be entered:

- President
- Board President
- Chair

- Chairperson
- Board Chair
- Chairman
- Board Chairperson
- Board Chairman

To delete a key staff, select the person's **Delete** link (**Figure 8.9 - 2**). Deleted key staff are moved to the **Deleted Key Staff** table and can be viewed by selecting the **View Deleted** link (**Figure 8.9 - 4**). When the Key Staff table has four entries, the New link is not active (**Figure 8.9 - 3**); otherwise, select the **New** link (**Figure 8.9 - 4**) to open an empty Staff Details panel.

Board Management Key Staff Management Subcontractor Management					
Key Staff					
	First Name	Last Name	Job Title	CSBG Role	Phone
Select Delete	Sue	Auman	Executive Director	Executive Director	(570) 374-0181
Select Delete	Kevin	Nickler	Fiscal Director	Fiscal Director	(570) 374-0181
Select Delete	Christine	Hart	MIS Coordinator	Local Administrator	(570) 374-0181
Select Delete	Kim	Amsler	Operations Director	Local Administrator	(570) 374-0181

1 ↑ 2 ↑ 3 → [New](#) [View Deleted](#) ← 4

Figure 8.9 - Key Staff Management

The **Staff Details** table (**Figure 8.10**) displays information for the selected Key Staff Member. To edit the information, select the **Edit** link (**Figure 8.10 - 1**). Selecting the **New** link (**Figure 8.10 - 2**) creates a new key staff entry. All information is required for each key staff entered into this module. Select the **Insert** link to save the entered information.

Staff Details	
First Name:	Robert
Last Name:	Cardamone
Job Title:	Executive Director
CSBG Role	Executive Director
Phone	(814) 938-3302
Extension	223
Email	rcardamone@jccap.org
Edit New ← 2 1	

Figure 8.10 - Staff Details Panel

Executive Director Approval

Before your Organization submits its **Annual Report**, the Executive Director must approve the Board Management, Key Staff Management, and Subcontractor Management information. The report cannot be submitted unless the Executive Director has approved the information in the last 30 days of the reporting period. To do this, the Executive Director must enter their initials into the textbox (**Figure 8.11**) found at the bottom of each **Edit Organization Information** page, and then select the **Approve** button.

Approval Initials:

By entering my initials and clicking the 'Approve' button I verify that my Organization's Board Members and Key Staff have been verified.

Approve

Board Member and Key Staff Information last approved on 8/30/2018 9:36:11 AM by Sue Fusco

Figure 8.11 - Executive Director Approval of Organization Management Information

Monitor Details Tab

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 and is entered/selected by the agency's Program Specialist.

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

- If last monitored is within the 3rd 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 field = "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 the next item that is due. This table is completed by DCED. Agency's may view the table at any point as a snapshot of what has been provided to the agency via e-mail.

Edit Organization Information			
Monitoring Details		Organization Details	
Monitoring Details			
Organization Name	Community Action Program of Lancaster County		Short Name Lancaster
Monitoring Due for 2022	On-Site	Reason	3-Year
Last Monitoring & Type	2/1/2021	Type	Desk
Last On-Site Monitoring	12/7/2017		
Risk Assessment	01/24/2022	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		

Figure 8.12 – Monitoring Details Table

Organization Management Tab

The Organization Management Tab was removed at the end of December 2020 as functionality was duplicative of the functionality found in the **Edit Agency Information**

9. Agency Questionnaire

Each agency will now enter their agency questionnaire within COPOS, submit it to DCED for review and process (or sent back for updates). The Executive Director, Local Admins, and Users with questionnaire access will have **Agency Questionnaire** on their left navigation menu starting with the 2022 report. The four sections of the questionnaire are: Agency Information, Self-Assessment, Subcontractors, and Discretionary Monitoring (**Figure 9.2**).

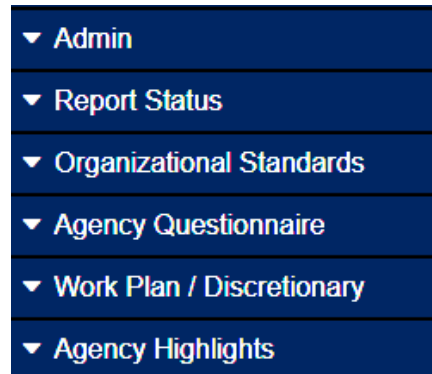


Figure 9.1 – Navigation Menu Agency Questionnaire Option

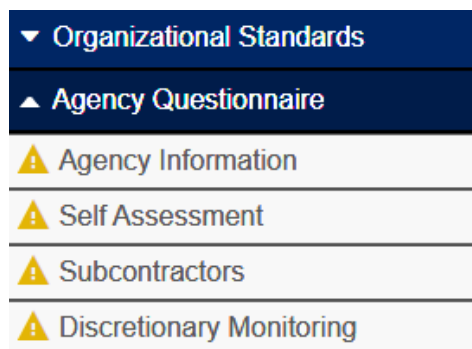


Figure 9.2 – Agency Questionnaire Sections

Agency Information

The Agency Information portion of the Community Services Block Grant Agency Questionnaire consists of 5 sections: General Information, Program Information, Tripartite Board, Client Files, and Program Operations. Some of the information displayed is pulled from existing agency information, some will be/is pulled from the agency's previous year's report, and some information must be entered (entered or copy/pasted from existing documentation).

Each entry box has a maximum number of characters that can be entered. This number, along with a character count, display at the bottom of each box. In the lower right-hand corner of these boxes are 2 slash marks. By dragging the corner, the box will expand (in order to fully show the text if needed) or get smaller.

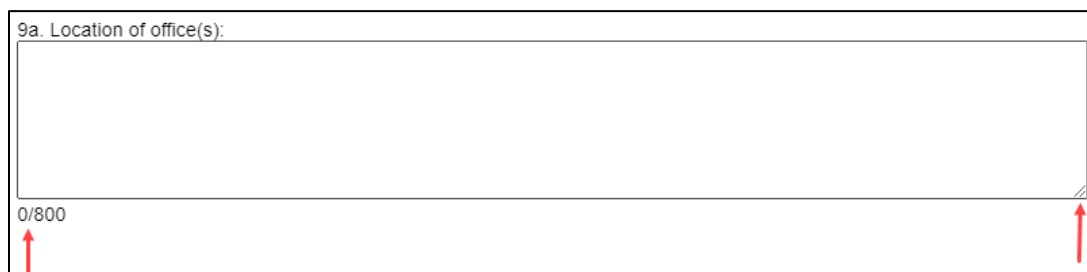


Figure 9.3 – Agency Questionnaire Entry Box

Section A: General Information

Numbers 1, 2, 3, 6, and 7: Agency name, contract number, DCED Program Specialist, Board Chair (or President), and the number of counties served information is located in the Admin – Edit Agency Information table and is pulled into the

section's fields. It is important to review and update this information on a regular basis within the Admin tab. It may not be edited within the Agency Questionnaire.

Numbers 4 (Date) and 5 (Completed By) are updated when information is entered into the questionnaire and when the Save button is selected. Note: The Save button can be selected at any time before the questionnaire is submitted to DCED.

Number 8 (Satellite/Remote Offices) is pulled from the previous questionnaire's answer but can be changed if needed.

The screenshot shows a web form titled "Section A: General Information". At the top, there is a "Save" button and a status message: "Last saved on: 9/20/2021 2:08:25 PM -- By: Agency2 Admin". Below this is a link for "Report Status". The form contains several fields with the following data: 1. Agency Name: Community Action Agency; 2. Contract Number: C000066966; 3. DCED CSBG Monitor/Representative: Melissa Tabb; 4. Date: 9/14/2021; 5. Completed by: Agency2 Admin; 6. Board Chair: John Mathias; 7. Number of counties served: 2; 8. Does your agency have satellite/remote offices funded by the CSBG contract?: Yes ☐ No ☐.

1. Agency Name: Community Action Agency		2. Contract Number: C000066966	
3. DCED CSBG Monitor/Representative: Melissa Tabb		4. Date: 9/14/2021	
5. Completed by: Agency2 Admin			
6. Board Chair: John Mathias			
7. Number of counties served: 2		8. Does your agency have satellite/remote offices funded by the CSBG contract? Yes <input type="checkbox"/> No <input type="checkbox"/>	

Figure 9.4 – Agency Questionnaire – Section A – General Information

Number 9a: Pulled from previous questionnaire's answer but can be changed. Provide the addresses of each of the agency's offices/locations.

Number 9b: Pulled from previous questionnaire's answer but can be changed. Provide a listing of the different services the agency provides.

The screenshot shows a form with two sections. The first section is labeled "9a. Location of office(s):" and has a text area with a character count of "0/800". The second section is labeled "9b. Listing of services provided:" and has a larger text area with a character count of "0/1500".

Figure 9.5 – Agency Questionnaire – Section A - Questions 9a and 9b

Numbers 10 – 12, 14 (Figure 9.6): Pulled from previous questionnaire's answer but can be changed.

Number 10: Enter the total number of agency staff at all of the offices/locations.

Number 11: Provide the hours of operations at the offices/locations.

Number 12: Provide a description of how supervision is provided to the off-site staff.

Numbers 13 and 14: Make the appropriate ADA selection and provide Limited English Proficiency (LEP) information.

Select the **Save** button to validate and save the information.

10. Number of Staff <input style="width: 90%;" type="text"/>	11. What are the hours of operation? <input style="width: 90%;" type="text"/>
12. How is supervision of off-site staff provided? <div style="border: 1px solid black; height: 60px; margin-top: 5px;"></div>	
0/500	
13. Are all client service locations compliant with the Americans With Disabilities Act (ADA)? Yes <input type="checkbox"/> No <input type="checkbox"/>	
14. Describe how the Agency's policies for providing translation and interpretation meet the legal obligation to provide assistance to limited english proficiency (LEP) clients receiving or potentially receiving agency services? <div style="border: 1px solid black; height: 60px; margin-top: 5px;"></div>	
0/700	

Figure 9.6 – Agency Questionnaire – Section A - Questions 10 - 12

Section B: Program Information

Number 1: Provide information on who the agency collaborates with, what is collaborated on, and how the collaboration occurs to address area poverty issues.

Number 2: Select all applicable checkboxes for National Goal(s) that are met.

Number 3: Select all applicable checkboxes for the CSBG program operation domains.

Select the **Save** button to validate and save the information.

Section B: Program Information

1. Briefly describe the collaboration (Who, What, How that occurs to address poverty issues throughout the various areas served):

0/2500

2. Indicate the National Goals that are met through CSBG program operations

☐ Individuals and families with low incomes are stable and achieve economic security.

☐ Communities where people with low incomes live, are healthy and offer economic opportunity.

☐ People with low incomes are engaged and active in building opportunities in communities.

3. Indicate which domains are addressed through CSBG program operations

☐ Employment

☐ Income

☐ Health

☐ Civic Engagement and Community Initiatives

☐ Education

☐ Housing

Figure 9.7 – Agency Questionnaire - Section B – Program Information

Section C: Tripartite Board

This section is to provide information regarding the agency's board and staff.

Number 1: Pulled from previous questionnaire's answer but can be changed. Provide information on new board member orientation training.

Number 2: Select/Enter the date for the most recent board and agency staff ROMA training.

Number 3a: Provide a list of board members who attended trainings, symposiums, or conferences and what they attended.

Number 3b: Provide information on any plans to send board members to any training, symposium, or conference.

Section C: Tripartite Board

Provide the following information regarding the Agency's current board composition:

1. Describe the orientation and training process for new board members:

0/500

2. When was the most recent ROMA training conducted for the board and agency staff by a Nationally Certified ROMA Trainer (NCRT)?

Board Training Agency Staff Training

3a. Which board members attended any trainings, symposiums, or conferences and what did they attend?

0/1500

3b. What are the plans to send a board member to a training, symposium or conference?

0/500

Figure 9.8 – Agency Questionnaire - Section C – Tripartite Board – Questions 1 - 3

Numbers 4 and 5: Select if the agency's board has a code of ethics and if so, describe where it is published.

Number 6: Select if the board manual contains the agency's mission statement.

Numbers 7a and 7b (based on type of CAP): Select if the board approves/reviews the annual budget.

Number 8: Pulled from previous questionnaire's answer but can be changed. Provide information on the board's role in organizational standard monitoring and compliance.

Select the **Save** button to validate and save the information.

4. Is there a code of ethics for the board?

Yes ☐ No ☐ N/A ☐

5. If yes, where is it published?

0/150

6. Does the mission statement appear in the board manual?

Yes ☐ No ☐

7a. In the case of a private CAP, does the board approve the agency's annual budget?

Yes ☐ No ☐ N/A ☐

7b. In the case of a public CAP, does the board review the annual budget?

Yes ☐ No ☐ N/A ☐

8. What is the board's role in monitoring and complying with the organizational standards?

0/500

Figure 9.9 – Agency Questionnaire – Tripartite Board – Questions 4 - 8

Section D: Client Files

This section pertains to client files and the information contained in them.

Number 1: Select if client files are retained on site and if DCED staff are able to inspect them.

Number 2: For a through i, select if the particular documents and information are in the client files.

Select the **Save** button to validate and save the information.

Section D: Client Files		
1. Are client files on-site and available for inspection by DCED staff? Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>		
2. Do client files contain the following documents and information:		
a. Intake forms with client signature	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
b. Eligibility determination and verification	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
c. Type of service or assistance	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
d. Dates of service	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
e. A service plan signed by the client	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
f. A goal plan signed by the client	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
g. A self-sufficiency matrix with evidence of client acknowledgement (i.e., initials)	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
h. Progress notes	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>
i. Discharge plan/case closure	Yes <input type="checkbox"/>	No <input type="checkbox"/> N/A <input type="checkbox"/>

Figure 9.10 – Agency Questionnaire – Section D – Client Files – Questions 1 and 2

Section E: Program Operations

This section is to provide agency information regarding denial of services, grievances, needs assessments, training, and tracking/analyzing data for COPOS reporting. For all questions, information is pulled from previous questionnaire's answer but can be changed.

Select the **Save** button to validate and save the information.

Number 1: Provide information on agency procedures for applicant denial of services.

Section E: Program Operations
1. What procedures does the agency have in place regarding denial of services to applicants determined ineligible for services?
<div></div>
0/500

Figure 9.11 – Agency Questionnaire – Section E – Program Operations

Section F: Agency Self-Assessment

The Agency Self-Assessment (Section F) of the questionnaire has 28 questions. Only question 1 information is pulled from the previous year's answer (but can be changed).

Section F: Agency Self-Assessment

1. What is the agency's current mission statement?

0/250

2. How do programs operated by the agency support the agency's achievement of the overall mission?

0/1000

Figure 9.12 – Agency Questionnaire – Section F – Agency Self-Assessment

Number 9: Will list any agency Organizational Standards that are currently “Not Met” or are “Awaiting ED Approval” and a list of standards previously un-met for several months. The agency should list any areas the agency will focus on to ensure all standards are met regularly, as well as providing information on any areas where assistance is required.

9. What are the areas of focus needed for the agency to fully comply with the organizational standards

Standards which are currently 'Not Met' or 'Awaiting ED Approval': 2.4; 4.1; 4.4; 4.6;

Standards previously un-met for several months: 2.4; 4.1

0/1500

Figure 9.13 – Agency Questionnaire – Agency Self-Assessment – Question 9

Number 24: Requires a description if Yes is selected.

Number 25: A description is required regardless if Yes, No, or N/A is selected.

Number 26: Requires a description if Yes or No is selected.

24. Are there procedures to ensure that program income from the sale of real or non-expendable property is properly recorded and reported

Yes ☐ No ☐ N/A ☐

If yes, describe:

0/500

25. For expendable personal property, are there adequate records to support the receipt of goods, issuance of goods and the balance of goods on hand?

Yes ☐ No ☐ N/A ☐

Describe:

0/500

26. Does the agency follow DCED Procurement Policy?

Yes ☐ No ☐

Describe:

0/500

Figure 9.14 – Agency Questionnaire – Agency Self-Assessment – Question 24 - 25

Numbers 27 and 28: Require a description if Yes is selected.

Select the **Save** button to validate and save the information.

27. Is the agency engaged in a technical assistance plan (TAP) or a quality improvement plan (QIP)?
Yes ☐ No ☐ N/A ☐
If yes, what is the status?

0/1500

28. Has the agency had other monitoring from other funding source that resulted in a corrective action plan?
Yes ☐ No ☐ N/A ☐
If yes, describe:

0/1000

Figure 9.15 – Agency Questionnaire – Agency Self-Assessment – Question 27 - 28

Subcontractors

If the agency engages subcontractors with CSBG funds, the agency needs to ensure those subcontractors are listed in the Admin -> Manage Board, Staff, Subcontracts -> Subcontractor Management information. Subcontractors are added, modified, and deleted here.

Edit Organization Information

Board Management | Key Staff Management | Subcontractor Management

Name	Services/Programs Provided	Subcontractors
No Subcontractors		

[New](#) [View Deleted](#)

Figure 9.16 – Subcontractor Management

If the agency does not have subcontractors listed in their Subcontractor Management, the Subcontractor option will not display in the left navigation menu. When the agency has subcontractors, the Subcontractors section of the Agency Questionnaire displays in the left navigation menu for selection and display of **Section G: Subcontractors**.

Numbers 1 and 2: A comment is not required.

Section G: Subcontractors

1. Does the agency subcontract for any of the services provided under the CSBG award?
Yes ☐ No ☐ N/A ☐
Comments:

0/150

2. Total # of subcontracts during the grant period:

Figure 9.17 – Agency Questionnaire – Section G – Subcontractors – Questions 1 and 2

Numbers 3 through 7a, 8, and 9a: A comment is required if No is selected.

<p>3. Are all subcontracts identified in the contract available for review?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/></p> <p>Comments:</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>0/150</p>
<p>4. Was a fully executed contract in place for all of the agency's subcontractors?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/></p> <p>Comments:</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>0/150</p>
<p>5. Do contracts for subcontracted services include a provision that the subcontractor must follow state procurement requirements and the fiscal requirements of agency's contract with DCED?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/></p> <p>Comments:</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>0/150</p>

Figure 9.18 – Agency Questionnaire – Subcontractors – Questions 3 - 5

Number 9b: A comment is required if Yes is selected.

Number 10: A comment is required if Yes is selected.

Numbers 11 through 13: A comment is required if No is selected.

Number 14: Inclusion of information is optional.

Select the **Save** button to validate and save the information.

<p>12. Does the agency's method of selecting service providers for subcontracts ensure fair competition to all interested parties?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/></p> <p>Comments:</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>0/150</p>
<p>13. Does the agency have procedures in place to ensure that subcontractors have current insurance policies for blanket fidelity bond coverage; comprehensive general liability; directors and officers liability; umbrella excess liability; professional liability?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/></p> <p>Comments:</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>0/150</p>
<p>14. Additional comments on subcontractors:</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div> <p>0/1500</p>

Figure 9.19 – Agency Questionnaire – Subcontractors – Questions 9b - 14

Discretionary Monitoring

If the agency has no previous year Discretionary Requests in COPOS, only questions 1 and 5 display; "None" will be auto-selected in number 1 and a comment is required for number 5. See information for Number 5 below on how to answer this question.

Select the **Save** button to validate and save the information.

Save
Last saved on: 9/14/2021 3:14:19 PM -- By: Agency2 Admin

[Report Status](#)

Discretionary Monitoring

1. What CSBG Discretionary Requests were available to the agency in the prior calendar year?

☒ None

5. **Closing Notes on all Discretionary Funding Received** - This is a final opportunity to document the agency's use of the discretionary funding. This is an opportunity to give the agency a 'shoutout' on your accomplishments and provide monitoring details(including lessons learned). **Also, be sure to specifically highlight any other agency Discretionary Funds which were not listed above.**

0/2000

Figure 9.20 – Agency Questionnaire – Discretionary Monitoring – Question 1 and 5

For each Discretionary Request within the prior year, a set of fields displays related to each Request displays.

Number 2: Requires a comment if No is selected.

Number 3: Requires a comment if In Progress & On Track or Not Met is selected for any Goal.

Number 4: Requires a comment if Yes is selected.

Number 5: Requires a comment. If the agency had Discretionary Requests that were closed within the current year which are not listed for any reason, these requests should be noted and summarized. For example, if the agency had a Discretionary Request in 2020 which they reported on in 2021, but was not completed, this Discretionary Request should be noted in question 5 along with appropriate notes regarding funds being expended and an agency monitoring of that request.

Discretionary Monitoring

1. What CSBG Discretionary Requests were available to the agency in the prior calendar year?

☒ Purchase Support Services to Improve Website and Supply PPE for Staff

Purchase Support Services to Improve Website and Supply PPE for Staff

2. **(Purchase Support Services to Improve Website and Supply PPE for Staff)** Has this project completed and the full **\$37000** expended for this Discretionary Project?

Yes ☐ No ☐

Comments: If project is incomplete or amount not yet expended, explain when the project will be completed, and all funds expended. Note: Comments are required if "No."

0/2000

3. **(Purchase Support Services to Improve Website and Supply PPE for Staff)** Was each project goal accomplished?

Improve usability of our website	Met <input type="checkbox"/> In Progress & On Track <input type="checkbox"/> Not Met <input type="checkbox"/>
Purchase 150 Clear Partitions for interface with clients	Met <input type="checkbox"/> In Progress & On Track <input type="checkbox"/> Not Met <input type="checkbox"/>

Comments & Explanations: Provide details on what was accomplished and other outcomes that were realized. For goals that are In Progress, explain when they will be accomplished. For all Not Met goals, provide information on why original goals were not met, as well as information on other positive outcomes that were achieved.

0/2000

4. **(Purchase Support Services to Improve Website and Supply PPE for Staff)** Was this project intended to be a pilot or demonstration project?

Yes ☐ No ☐

Comments & Explanations: Required if answer is Yes. Please document any ongoing funding that will be used for continuing this project.

0/1000

Figure 9.21 – Agency Questionnaire – Discretionary Monitoring – Question 1 – 4

When all Agency Questionnaire sections are noted as Completed, a box for the agency Executive Director to enter their initials and a **Submit Agency Questionnaire** button display. After initials are entered and the button is selected, DCED receives a notification to review the questionnaire. DCED will return the questionnaire for updates or approve it.

Agency Questionnaire	
Agency Information	Complete
Self Assessment	Complete
Subcontractors	Complete
Discretionary Monitoring	Complete

Approval Initials:

By entering my initials and clicking 'Submit Agency Questionnaire', I verify this information is current and accurate for my agency.

Submit Agency Questionnaire

Figure 9.22 – Agency Questionnaire – Ready to Submit to DCED

10. Agency Funding Allocations

After DCED receives the funding allocation for the next reporting year and enters each agency's allocation, the Work Plan is made available (making it display on the left navigation menu) to the agency Executive Director, Local Admins and Users with Work Plan access receive a dashboard alert (**Figure 10.6**). The Description displays the date the Work Plan is to be submitted to DCED. Additional allocations also generate a dashboard Alert.

Executive Director Instructions Edit User Info ▼				
My Newest Alerts				
Alert	Description	Created Date	Worked	Hide
Work Plan	Submit by 11/30	9/3/2021	X	X

Figure 10.1 – Dashboard Alert When Work Plan Submitted to Agencies

11. Agency Work Plan

Starting with the 2022 reporting year, the Executive Director, Local Admins, and Users with Work Plan access will have the **Work Plan/Discretionary** option on their left navigation menu once allocations are received (**Figure 11.1**). The agency Work Plan is to be completed and submitted to DCED within COPOS for each reporting year (current year + 1 year).

At the bottom of each option is a **Work Plan Status** page link. When the link is selected, the status of each section displays red as **Incomplete** or green as **Complete** (**Figure 11.4**). The Work Plan cannot be submitted to DCED until all sections are Complete. DCED will review the Work Plan and process or send back for updates. Information on "Discretionary" is provided in Section 17.

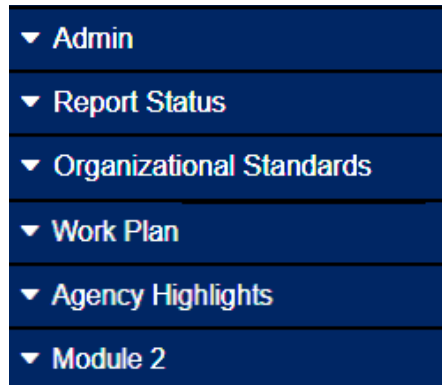


Figure 11.1 – Navigation Menu Agency Work Plan Option

The four Work Plan sections are: CSBG Community Action Plan, Budget, Enrollment Goals, and Subcontractors as shown in **Figure 11.2**. A gold triangle next to a Work Plan section (**Figure 11.3**) indicates it is not complete.

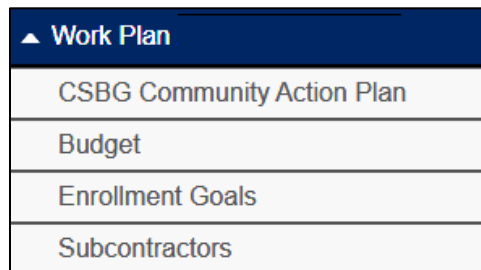


Figure 11.2 – Work Plan Sections

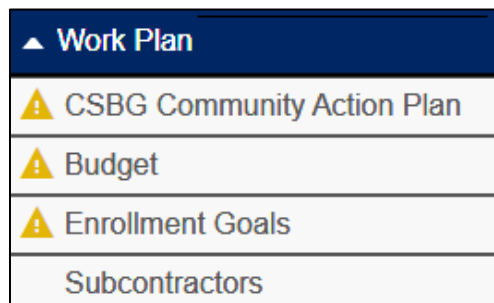


Figure 11.3 – Work Plan Section Status Indicator

Work Plan	
Community Action Plan	Incomplete
Budget	Incomplete
Enrollment Goals	Incomplete
Subcontractors	Complete

Figure 11.4 – Work Plan Section Statuses Example

CSBG Community Action Plan (CAP)

The Work Plan CSBG CAP provides the capability for each agency to complete sections 1 – 9 and upload related documents to their CAP (**Figure 11.6**). Select the **View Organization Allocations** link (**Figure 11.5 – 1**) at the top of the CAP to view the funding allocations for the Work Plan reporting year for each agency and all of the allocations within the reporting year. Information on the Funding Allocation process is described in Section 10.

The agency's current Contract Number and Contract Start Date (**Figure 11.5 – 2 and 3**) are auto-filled from the same information in the agency's Edit Organization panel (see Section 8). The Contract Start date cell displays yellow when in the last year of the contract. This is a reminder that the contract information will need to be updated.

At a minimum in section 1, rows A and B must have information entered in the three (3) boxes to (**Figure 11.5**). An agency is able to enter section-related information in rows A – G. **Figure 11.8** shows an example of 2 errors when the Save button is selected: 1) If information is not entered in rows A and B or 2) Information is missing from a row's cell. Information must be entered in sections 2 – 9 (**Figure 11.6**); if not entered, an error pop-up message box displays when the Save button is selected.

A section is provided to upload CSBG CAP-related documents (**Figure 11.7**). This functionality is described in Section 15. Although the system does not require documents to be uploaded, agency's should continue to attach any document normally sent with the agency Work Plan. For example, each agency should attach supplementary information which explains data found in their Work Plan, as well as a copy of a job description which is paid by CSBG funding. Select the Save button to save the information and complete the validation.

Save

1 → [View Organization Allocations](#)

2 → Contract Number: C000066966 Contract Start Date: 1/1/2018 ← 3

2022 Community Services Block Grant Community Action Plan
Please complete the following sections by inserting your responses as indicated in the text boxes

1.) In the columns below, list the top needs identified in the community needs assessment; available community or agency programs to respond to those needs; and the programs the agency will operate with CSBG funding to respond to those needs.

Identified Need	Existing or Anticipated Community / Agency Programs	Funded Program / Service / Strategy
A.) Line a information - need	Line a agency programs	line a funded information
B.) Line b information - need	Line b agency programs	line b funded information
C.) Click or tap here to enter text	Click or tap here to enter text	Click or tap here to enter text

Figure 11.5 – CSBG Community Action Plan (CAP) Section 1

2.) Describe the programs, services, and strategies the agency will operate with CSBG funds to respond to the identified community needs and how this plan will work together with or parallel to the CARES PLAN. **Include Targeted outcomes in Appendix A - Attachment 1.**

Click or tap here to enter text

9.) Please describe the actions your agency will take during this program year to conduct a new needs assessment. Include information about your methods of gathering and analyzing the information.

Click or tap here to enter text

Figure 11.6 – CSBG Community Action Plan (CAP) Sections 2 and 9

Use This Section to Upload Additional Action Plan Documents

Select a PDF Document to be added:

Date Added ☐ Document Name ☒ Document Type

[Upload New Document](#)

Documentation for this Work Plan:

(none)

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

Figure 11.7 – Upload CSBG CAP Documents and Work Plan Status Link

2022 Community Services Block Grant Community Action Plan		
Please complete the following sections by inserting your responses as indicated in the text boxes		
1.) In the columns below, list the top needs identified in the community needs assessment; available community or agency programs to respond to those needs, and the programs the agency will operate with CSBG funding to respond to those needs.		
Identified Need	Existing or Anticipated Community / Agency Programs	Funded Program / Service / Strategy
A.) Testing ne	tion	Testing strategy information
<div style="border: 1px solid black; padding: 10px; text-align: center;"> <h3>Community Action Plan</h3> <p>You must enter at least 2 Identified Needs.</p> <p>Identified Need is missing field(s).</p> <p>You must enter a response to all questions.</p> <input type="button" value="Close"/> </div>		
B.) Click or t	formation	Testing service information

Figure 11.8 – CSBG CAP Error Message Example

Budget

The total allocation for the agency displays at the top of the Budget page. This is the total of the initial allocation plus any additional allocations. For each funding allocation designated in the upcoming reporting or during the reporting year, an allocation column displays in the Budget table.

The blank boxes in each section can be used to describe a category's budget item – an associated allocation amount needs to be entered (**Figure 11.9**). If an allocation amount is entered, an associated description must be entered. The **View Organization Allocations** link at the top of the Budget page provides the capability to view the funding allocations for the Work Plan reporting year for each agency and all of the allocations within the reporting year. Information on the Funding Allocation process is described in Section 10.

[View Organization Allocations](#)
 Allocation:

	1st Allocation	2nd	Totals
MACHINERY & EQUIPMENT			
Equipment Purchase	0	0	0
<input type="text"/>	0	0	0
<input type="text"/>	0	0	0
<input type="text"/>	0	0	0
<input type="text"/>	0	0	0
<input type="text"/>	0	0	0
Total Machinery & Equipment	0	0	0
OPERATING COSTS/WORKING CAPITAL			
Salary & Fringe (by position):			
Executive Director	0	0	0
Assistant Director(s)	0	0	0
Fiscal Director	0	0	0
IT Support Specialist	0	0	0
<input type="text"/>	0	0	0

Figure 11.9 – Budget Category Sample

As allocation amounts are entered, each row's Total amount is updated as well as the Total CSBG Program Allocation and Totals amounts. The Total CSBG Program Totals cell will display as red until the total equals the Allocation amount shown at the top of the Budget page (**Figure 11.10**). When the amounts are equal, the cell displays as white.

Select the Save button to save the information and complete the validation. The Work Plan Budget status displays red as **Incomplete** until the red cell is cleared (the Budget status is then **Complete**).

<input type="text"/>	0	0	0
Total Other Costs	0	0	0
TOTAL CSBG PROGRAM	0	0	0

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

Figure 11.10 – Budget Total CSBG Program Totals Display

Enrollment Goals

At least 1 Target # and associated Enrollment # must be entered in the agency Work Plan Enrollment Goals. The Target numbers will update the associated FNPI Target numbers in the upcoming reporting year. A separate submission of Target Numbers is no longer required.

The Target number must be equal or less than its Enrollment number. If the Target number is greater than its Enrollment number, the Enrollment number cell displays in red (**Figure 11.11**). Each Section provides the capability to enter an Other Indicator description and the associated Target and Enrollment numbers (**Figure 11.11**).

Select the Save button to save the information and complete the validation. The Work Plan Enrollment Goals status displays red as **Incomplete** until no errors exist; the Enrollment Goal status displays green as **Complete**. All Targets for all funds should be entered and will automatically populate the Goals in Module 4 A FNPI's.

Year's beyond 2022 will compare to the past year to help the agency assure that Targets are entered for all Appropriate Goals.

Goals and Objectives - 2022				
Family National Performance Indicators (Module 4)				
Indicator Description		Target #	out of	Enrollment #
Section A: Employment Indicators				
FNPI 1a	FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.	20	out of	0
FNPI 1b	FNPI 1b The number of unemployed adults who obtained employment (up to a living wage).	0	out of	40
FNPI 1c	FNPI 1c The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).	0	out of	0
FNPI 1d	FNPI 1d The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).	0	out of	0
Section A: Outcomes Across Multiple Domains				
FNPI 7a	FNPI 7a The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains.	0	out of	0
Other Outcome Indicator				
FNPI 7z.1	FNPI 7z1 The number of individuals	0	out of	0
Once all Work Plan sections are complete, submit the Work Plan from the Work Plan Status page				

Figure 11.11 – Enrollment Goals Sample

Subcontractors

If any subcontractors are listed in **Subcontractor Management (Figure 11.12)**, the name and service/program provided information will auto-populate in the **Work Plan Subcontractor** section (**Figure 11.13**). This section requires each subcontractor's Contract Amount.

If an agency does not use subcontractors for any CSBG Funding work, no information will be added in Subcontractor Management and no information will display in the Work Plan Subcontractors table. In this case when the **Save** button is selected, there are no errors and the Work Plan Subcontractors status is green as **Complete**.

When the Work Plan Subcontractors table displays at least one name, the Contract Amount is required to be entered. Until all Contract Amounts are entered, the Work Plan Subcontractor status is red as **Incomplete**.

Edit Organization Information						
Board Management Key Staff Management Subcontractor Management						
<div> <div>Subcontractors</div> <table border="1"> <thead> <tr> <th>Name</th> <th>Services/Programs Provided</th> </tr> </thead> <tbody> <tr> <td>Contractor 1</td> <td>Variety of services</td> </tr> </tbody> </table> </div>			Name	Services/Programs Provided	Contractor 1	Variety of services
Name	Services/Programs Provided					
Contractor 1	Variety of services					
Select Delete						
New View Deleted						

Figure 11.12 – Subcontractor Management Contractor Example

Subcontractor Name	Contract Amount	Services/Programs Provided
Contractor 1	\$ 2475	Variety of services
TOTAL:	\$ 2475	

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

Figure 11.13 – Work Plan Subcontractor Sample

Work Plan Submission to DCED

To verify the status of each Work Plan section, select the **Work Plan Status** page link, found at the bottom of each section of the Work Plan, or select **Report Status** and **Status of Other Reports** in the left navigation menu (**Figure 11.14**). If all Work Plan sections are not complete, the agency Executive Director will not have the capability to approve the Work Plan and submit it to DCED (**Figure 11.5**). When all Work Plan sections are complete, the agency Executive Director will be able to enter their initials and select the **Submit Work Plan to DCED** button (**Figure 11.16**). **Note:** The Work Plan, as a full PDF document, is saved in the agency's Manage Active Documents.

▲ Report Status

Annual Report Status

Statuses of Other Reports

Figure 11.14 – Report Status – Statuses of Other Reports Menu Options

Work Plan	
Community Action Plan	Complete
Budget	Complete
Enrollment Goals	Incomplete
Subcontractors	Complete

Approval Initials:

By entering my initials and clicking 'Submit Work Plan to DCED', I verify the current agency funding amounts are complete and accurate.

Submit Work Plan to DCED

Figure 11.15 – Work Plan Status – ED Unable to Approve and Submit

Work Plan	
Community Action Plan	Complete
Budget	Complete
Enrollment Goals	Complete
Subcontractors	Complete

Approval Initials:

By entering my initials and clicking 'Submit Work Plan to DCED', I verify the current agency funding amounts are complete and accurate.

Submit Work Plan to DCED

Figure 11.16 – Work Plan Status – ED Able to Approve and Submit

When the agency Work Plan is approved and submitted to DCED, the agency ED, Local Admins, and Users with Work Plan access alert is automatically worked (Figure 11.17).

My Alerts				
My Active Alerts My Hidden Alerts My Worked Alerts				
My Worked Alerts				
Alert	Description	Created Date	Worked	Hide
Work Plan	Submit by 11/30	9/3/2021	Worked on 9/22/2021 Un-Work	X

Figure 11.17 – Work Plan Status – Agency Worked Alert

If DCED returns the Work Plan to the agency for modifications, the same users receive a dashboard alert (Figure 11.18).

My Alerts				
My Active Alerts My Hidden Alerts My Worked Alerts				
My Active Alerts				
Alert	Description	Created Date	Worked	Hide
Work Plan Returned	Corrections Needed	9/9/2021	X	X

Figure 11.18 – Work Plan Send Back – Agency Alert

Print Work Plans

Each agency is able to download or e-mail an Adobe PDF version of their Complete Work Plan (full or blank), the Community Action Plan (CAP) section or Budget section (Figure 11.19). Select **Download Reports** in the left navigation menu and select the **Work Plan Reports** bar or down arrow. Select the envelope icon to attach the report in an e-mail message. Select the down arrow to create the report to view on-line.





Work Plan Reports	
Complete Work Plan	
Prints entire Work Plan including Attachments	
<input checked="" type="radio"/> Full <input type="radio"/> Blank	 
Work Plan Sections	
Prints Work Plan CSBG Community Action Plan or Work Plan Budget	
<input checked="" type="radio"/> CAP <input type="radio"/> Budget Note: Enrollment Goals should be printed from Module 4:A Reports	 

Figure 11.19 – Download Agency Work Plan

Once the agency Work Plan has been submitted to DCED for review, DCED may send it back to the agency for changes. The updated agency Work Plan can be submitted again to DCED for review. Once a Work Plan has been returned and submitted, another Work Plan Reports option is available. The previously submitted Work Plan can be printed. Each submitted/returned Work Plan for the reporting year, displays in the **Prior Work Plans which were Submitted** list (Figure 11.20). Select the desired Work plan to download and/or e-mail.

Download Report Content

Report Font Size Normal Aa

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 1/25/2022
 ✉ ⬇

Figure 11.20 – Download Agency Work Plan – Prior Submitted Work Plans

12. Report Submission

The agency Executive Director, Local Admins and Users with access to the Annual Report sections and/or the agency Work Plan, see a Report Status option in the left navigation menu. **Figure 12.1** shows the menu option if a User does not have Work Plan access and **Figure 12.2** shows the menu options for the agency Executive Director Local Admins, and Users with Work Plan Access.

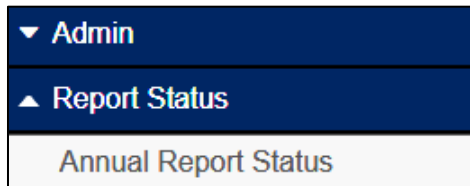


Figure 12.1 - Report Status Menu Option – No Work Plan Access

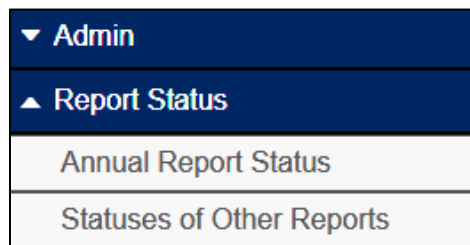


Figure 12.1 - Report Status Options – With Work Plan Access

Annual Report Submission

The Executive Director (or Annual Report Delegate) is required to submit First, Second, Third, and Fourth Quarter reports prior to each reporting Lock Date. **Note:** With the agency's Work Plan Enrollment Goal Target numbers roll to the associated FNPI number, submission of the Target numbers is no longer necessary.

Before a report can be submitted, all sections that require reporting in the current quarter must be saved and validated. To check the status of each report section, Select **Report Status** the **Annual Report Status** from the left navigation menu. The status of each section is displayed in a table (**Figure 12.3 - 3**). Sections not required for the report during the noted timeframe display as "N/A" in gray. Required sections display either "Complete" in green or "Incomplete" in red. If the status is "Incomplete", the section name (**Figure 12.3 - 2**) can be selected to navigate to the section and reviewed for validation errors. The "Other" section (**Figure 12.3 - 4**) displays additional requirements to be completed before a report can be submitted. Currently, the only "Other" requirement is "Board and Key Staff Approval". Select the **Board and Key Staff** link to display the **Edit Organization Information** page where the Executive Director is able to review and approve the information (if the status is Needs Approval).

When all red status messages are fixed, a Submit Quarter Report at the bottom of the page is active and the report can be submitted (**Figure 12.4**). The button is also active on the Executive Director's Home page dashboard. The text of the Submit button is determined by the reporting quarter and is changed to reflect overrides. The Quarter Select Dropdown (**Figure 12.3 - 1**) can be used to check the status of previous quarters.

1 →	Quarter	Third	
	Agency Highlights		
2 →	Delivering Services		N/A
	Mobilizing Resources		N/A
	Analytic Approaches		N/A
	Module 2		
	Section A - A.2		N/A
	Section A - A.4		N/A
	Section B		N/A
	Section C		N/A
	Module 3		
	Community-Level Initiatives		N/A
	Module 4: A (Quarterly)		
	FNPI 1 - Employment	Incomplete	3
	FNPI 2 - Education/Cognitive Development	Complete	
	FNPI 3 - Income/Asset Building	Complete	
	FNPI 4 - Housing	Complete	
	FNPI 5 - Health and Social	Complete	
	FNPI 6 - Civic Engagement	Complete	
	FNPI 7 - Multiple Domains	Complete	
	Module 4: B		
	SRV 1 - Employment		N/A
	SRV 2 - Education/Cognitive Development		N/A
	SRV 3 - Income/Asset Building		N/A
	SRV 4 - Housing		N/A
	SRV 5 - Health and Social		N/A
	SRV 6 - Civic Engagement		N/A
	SRV 7 - Multiple Domains		N/A
	Module 4: C		
	General		N/A
	1. Gender		N/A
	2. Age		N/A
	3. Education Levels		N/A
	4. Disconnected Youth		N/A
	5. Health		N/A
	6. Ethnicity / Race		N/A
	7. Military Status		N/A
	8. Work Status		N/A
	9. Household Type		N/A
	10. Household Size		N/A
	11. Housing		N/A
	12. Level of Household Income		N/A
	13. Source of Household Income		N/A
	14. Other Income Source		N/A
	15. Non-Cash Benefits		N/A
	Individuals Not Included in 4:C 1-15		N/A
4 →	Other		
	Board and Key Staff Approval		Approved

Figure 12.3 - Report Status

When there are no report section errors and when the submission button is selected, a confirmation pop-up box displays (**Figure 12.5**); select the **Continue** button to validate the report and submit it. A Report Submission error pop-up box (**Figure 12.6**) displays if there are validation errors in any required report section or if additional requirements, such as Board and Key Staff Approval, are not met. All errors displayed in the pop-up box must be resolved before the report can be submitted. If no errors exist when submitting the report, the "Report Submitted" pop-up box displays (**Figure 12.7**).

Submit Fourth Quarter Report

Figure 12.4 - Report Submission Button

Report Submission Confirmation

Are you sure you want to submit your Organization's Second Quarter Report?

By clicking the "Submit" button **Executive Director Name**, the **Executive Director** for **Agency Name**, verifies all information submitted is correct to the best of your knowledge. If you need to modify data after submission, the Executive Director must first un-submit the report. After changes are made, the report must be submitted again. All sections must be completed before the Second Quarter report can be submitted.

Continue Cancel

Figure 12.5 - Report Submission Confirmation Pop-up Box

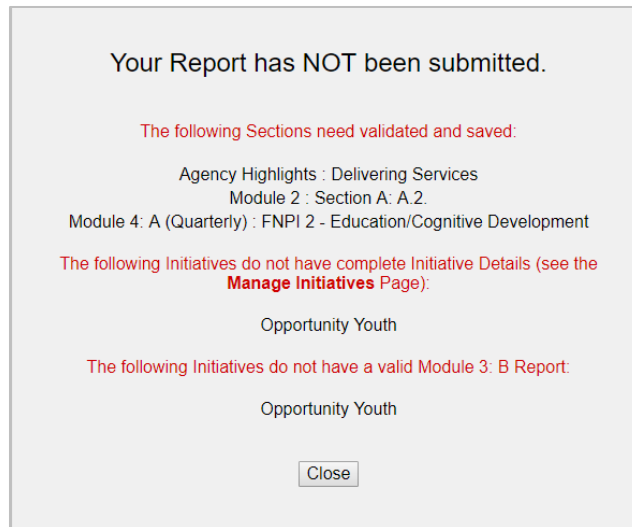


Figure 12.6 - Report Submission Error Pop-up Box

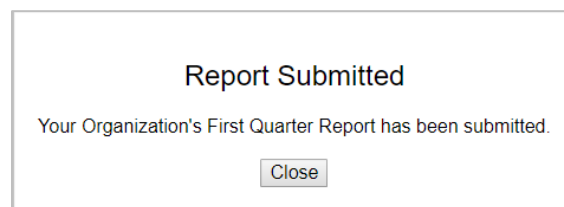


Figure 12.7 - Report Submitted Pop-up Box

During submission of the Fourth Quarter, another pop-up box displays (**Figure 12.8**) stating a Complete Annual Report will be generated and associated with Organizational Standard 9.4. This process reverts Standard 9.4 to “unapproved” and the Executive Director (or a Delegate approved to submit an OS) must reapprove the Organizational Standard on the report page. After COPOS generates the Complete Annual Report, the Executive Director will automatically be redirected to the Organizational Standards page with Standard 9.4 in edit mode.

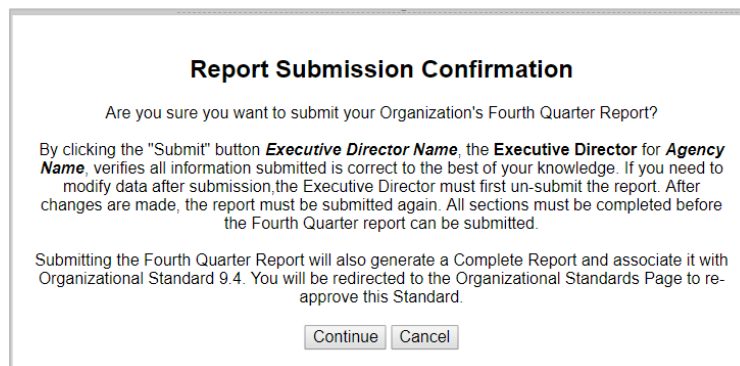


Figure 12.8 - Fourth Quarter Report Submission Pop-up Box

After a report is submitted, the button text changes to **Un-submit** until the quarter is locked. If additional changes are needed prior to the lock date, the Executive Director (or Annual Report Delegate) must first un-submit the report. After changes have been made, the Executive Director (or Annual Report Delegate) must again validate and submit the report. Once the Lock Date has passed, Organizations cannot submit or modify a report without an active override (see Section 13).

Other Report Submissions

The agency Executive Director, Local Admins and Users with access to the agency Work Plan, have a Status of Other Reports option in the left navigation menu. When selected, the statuses for each section of the Agency Questionnaire

and Work Plan display (**Figure 12.9**). If a section is noted as red '**Incomplete**', the associated report cannot be submitted. All sections must display as green '**Complete**' to submit the report to DCED.

Agency Questionnaire	
Agency Information	Incomplete
Self Assessment	Complete
Subcontractors	Incomplete
Discretionary Monitoring	Complete
Work Plan	
Community Action Plan	Complete
Budget	Complete
Enrollment Goals	Complete
Subcontractors	Complete

Figure 12.9 – Agency Questionnaire and Work Plan Report Statuses

When all Agency Questionnaire sections are noted as Completed, a box for anyone in the agency to enter their initials and a **Submit Agency Questionnaire** button display (**Figure 12.10**). After initials are entered and the button is selected, DCED receives a notification to review the questionnaire. DCED will return the questionnaire for updates or approve it.

Agency Questionnaire	
Agency Information	Complete
Self Assessment	Complete
Subcontractors	Complete
Discretionary Monitoring	Complete
<p>Approval Initials: <input type="text"/></p> <p>By entering my initials and clicking 'Submit Agency Questionnaire', I verify this information is current and accurate for my agency.</p> <p>Submit Agency Questionnaire</p>	

Figure 12.10 – Agency Questionnaire – Ready to Submit to DCED

When all agency Work Plan sections are noted as Completed, a box for the agency Executive Director (or assigned Delegate(s)) to enter their initials and a **Submit Work Plan to DCED** button display (**Figure 12.11**). After initials are entered and the button is selected, DCED receives a notification to review the questionnaire. DCED will return the questionnaire for updates or process it.

Work Plan	
Community Action Plan	Complete
Budget	Complete
Enrollment Goals	Complete
Subcontractors	Complete
<p>Approval Initials: <input type="text"/></p> <p>By entering my initials and clicking 'Submit Work Plan to DCED', I verify the current agency funding amounts are complete and accurate.</p> <p>Submit Work Plan to DCED</p>	

Figure 12.11 – Work Plan – Ready to Submit to DCED

Status Report Screen

The Status Report screen is available to the agency Executive Director, Local Admins, and Users with Annual Report write access. The information is used as a 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 4th 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.

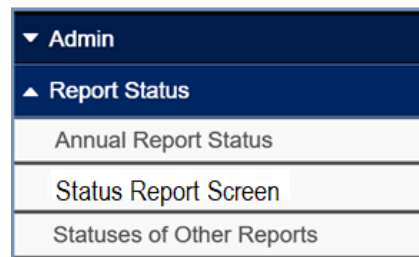


Figure 12.12 – Status Report Screen Menu Option

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	
■	OK - Good to Go!
■	Review - Attention Getter - Action Not Required, if results are intended
■	Explain or Update - Notes / Explanation Required
■	Updates Required - Please Complete Section (Enter Note)

Figure 12.13 – Status Report Screen Legend

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

Figure 12.14 – Status Report Screen – Domain-Specific Program Indicators

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

Figure 12.15 – Status Report Screen – Domain-Specific Program Indicator Data Origins - a

Outcomes (FNPI 4A)	Linkages, Capacity Building and Emergency / Other display: N/A
	<ul style="list-style-type: none"> 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.
	<ul style="list-style-type: none"> 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:
	<ul style="list-style-type: none"> 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 12.15 – 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 12.16 – Status Report Screen – Other Indicator Lights

CSBG Funds Allocated (Includes Discretionary).	Dollar amount displayed = your agency Allocation + Discretionary Processed Amounts. Cell displays green.
Administrative Expenses percentage.	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%.
Un-Met Organizational Standards number	Number of "Unmet" Standards on the OS Report. Cell displays green if number = 0. Cell displays red if number > 0.
OS Un-Met for More than 3 Month	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.
Late Report Submissions (reviews 2 years) numb	Number of dashboard Report Submissins Statuses that are NOT green or gray. Cell displays green if number = 0. Cell displays red if number > 0.
Outcomes Not Between 80% and 120%	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 12.17 – 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 12.18 – Status Report Screen – Expenditure Report & Comparison

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

Figure 12.19 – Status Report Screen – Expenditure Report & Comparison Data Origins

Note: For years prior to 2022, the CSBG Allotment(s) from Work Plan and CSBG Discretionary will be \$0, since these items (Work Plan and Discretionary) were first implemented in 2022 within COPOS.

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

Figure 12.20 – Status Report Screen – Review Miscellaneous Other Items

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

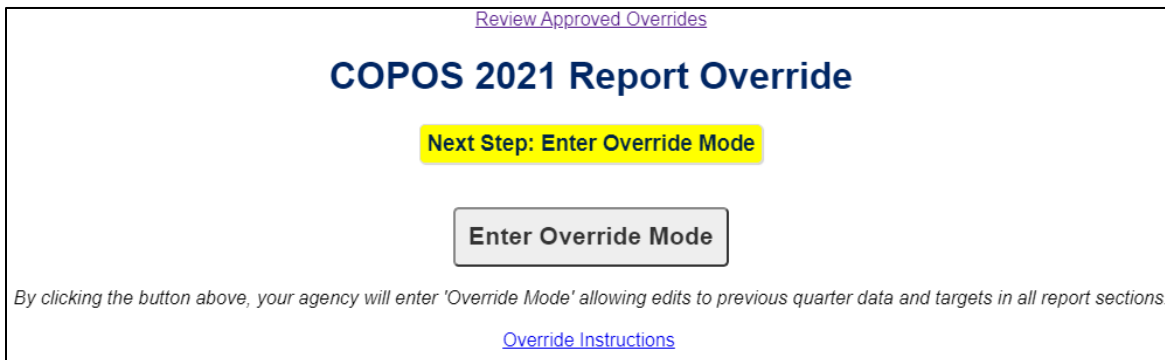
Figure 12.21 – Status Report Screen – Review Miscellaneous Other Items Data Origins

13. Overrides

Overrides allow your agency to request changes to values for previous report quarters that have passed the associated Lock Date. Overrides are only available during the current report year and the prior report year up through reporting to OCS. An override cannot be started once the process of exporting the data to OCS has started. **Note:** The override process must be used for all late report submissions.

Beginning an Override

An Override can be started by a Local Administrator or the Executive Director by selecting **Begin an Override** under **Admin** in the left navigation menu, then selecting the **Enter Override Mode** button (**Figure 13.1**) and then the Enter Override Mode on the pop-up box. Once the Override is active, any user with Report write access from your organization may enter/modify data for all previous quarters in any report section they have access to. Instructions on the Override process are accessed by selecting the **Override Instructions** link.

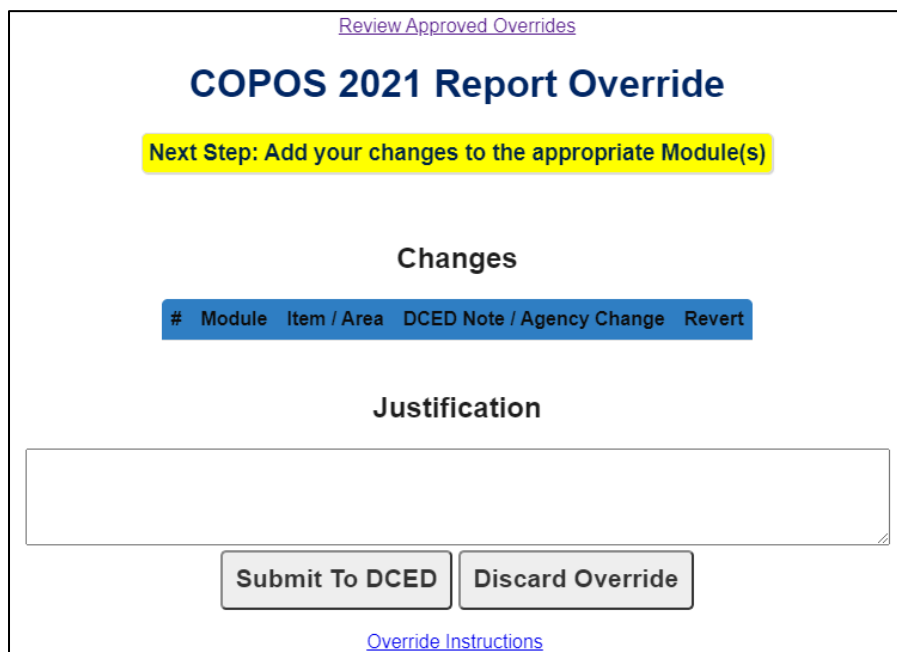


The screenshot shows a web interface titled "COPOS 2021 Report Override". At the top, there is a link "Review Approved Overrides". Below the title, a yellow box contains the text "Next Step: Enter Override Mode". Underneath this, there is a button labeled "Enter Override Mode". At the bottom, a line of text reads: "By clicking the button above, your agency will enter 'Override Mode' allowing edits to previous quarter data and targets in all report sections." Below this text is another link "Override Instructions".

Figure 13.1 – Begin an Override – Enter Override Mode

Select the **Discard Override** button to cancel the override (**Figure 13.2**).

Note: If submitting an override to DCED due to a late report submission and all changes have been made, enter a note in the Justification box and select the **Submit to DCED** button. *Otherwise*, continue to the report section(s) to make changes – do not submit to DCED at this point.



The screenshot shows a web interface titled "COPOS 2021 Report Override". At the top, there is a link "Review Approved Overrides". Below the title, a yellow box contains the text "Next Step: Add your changes to the appropriate Module(s)". Underneath this, there is a section titled "Changes" which contains a table with the following headers: "#", "Module", "Item / Area", "DCED Note / Agency Change", and "Revert". Below the table is a section titled "Justification" which contains a large text input box. At the bottom of the form, there are two buttons: "Submit To DCED" and "Discard Override". Below these buttons is a link "Override Instructions".

Figure 13.2 – Override Entered

Reviewing an Override

Local Administrators and Executive Directors are able to review changes made during an Override by selecting **Review Override** under **Admin** in the left navigation menu, which displays changes made as shown in **Figure 13.3**. “Next Step” instructions are displayed under the page title (**Figure 13.3-1**). All values changed during the override are listed in a table (**Figure 13.3 – 2**). Each row shows basic information about each value, along with the changed value itself

To revert a change made during the override, select the associated “Revert” box (**Figure 13.3 – 3**) in each row that is to be reverted. When a change is selected to be reverted (**Figure 13.3-3**), the “Next Step” instruction box changes from yellow to white and the number of changes to be reverted displays above the table (**Figure 13.3-4**).

Selecting the **Discard Override** button (**Figure 13.3 – 7**), reverts all selected changes and ends the override.

The screenshot shows the 'COPOS 2021 Report Override' page. At the top, a link 'Review Approved Overrides' is highlighted with a red arrow and the number 8. Below the title, a yellow box contains the text 'Next Step: Enter additional changes as needed and then click Submit to DCED', with a red arrow and the number 1 pointing to it. The main section is titled 'Changes' and contains a table. A red arrow and the number 2 point to the table header. Above the table, a yellow box says 'Revert 1 Selected Change(s)', with a red arrow and the number 4 pointing to it. The table has columns: '#', 'Module', 'Item / Area', 'DCED Note / Agency Change', and 'Revert'. The first row shows 'Module 4: A (Quarterly)' and 'FNPI 1a The number of unemployed youth who obtained employment to gain skills or income'. Below this, two rows show changes for the 'Second Quarter - Total Participants Enrolled in Program(s)' (7 → 10) and 'Second Quarter - Total Participants Achieving Outcome' (4 → 5). A red arrow and the number 3 point to the 'Revert' checkbox in the second row, which is checked. Below the table is a 'Justification' section with a text box containing 'Values have been updated.', with a red arrow and the number 5 pointing to it. At the bottom, there are two buttons: 'Submit To DCED' (with a red arrow and the number 6 pointing to it) and 'Discard Override' (with a red arrow and the number 7 pointing to it).

#	Module	Item / Area	DCED Note / Agency Change	Revert
1	Module 4: A (Quarterly)	FNPI 1a The number of unemployed youth who obtained employment to gain skills or income		
		Second Quarter - Total Participants Enrolled in Program(s)	7 → 10	<input type="checkbox"/>
		Second Quarter - Total Participants Achieving Outcome	4 → 5	<input checked="" type="checkbox"/>

Figure 13.3 – Reviewing an Override

Submitting an Override

Once all override changes are complete or needing to submit due to a late report submission, the Executive Director must submit the override to DCED. Enter an override justification in the **Justification box** (**Figure 13.3 – 5**), then select the **Submit To DCED** button (**Figure 13.3 – 6**). **Note:** All report sections must have valid data in order to submit an Override. Once an Override has been submitted, it will be reviewed by DCED and either returned with a response message explaining why it was returned or an **Approved** response, in which case all changes will be applied to your organization and all affected reports are submitted.

Reviewing Approved Overrides

Once DCED approves an override, it can be viewed by selecting **Admin** then **Begin an Override** or **Review Overrides** then selecting the **Review Approved Overrides** link (**Figure 13.3 – 8**). This displays the **Review Approved Agency Overrides** page where all Overrides for the currently selected report year are displayed (**Figure 13.4**). Each Override is displayed with an Override number (#), Approved by date and name, a table listing all changes, and the justification for the changes.

Override #2

Approved on 1/24/2020 by Program Specialist

Override Changes					
#	Module	Section	Item	Quarter	Change
1	Module 4: A (Quarterly)	FNPI 1 - Employment	FNPI 1a - Number of Participants Expected to Achieve Outcome	Target	0 → 5
2	Module 4: A (Quarterly)	FNPI 1 - Employment	FNPI 1a - Total Participants Achieving Outcome	Third	0 → 5

Justification

Values were incorrectly entered for these quarters due to an issue with our reporting database.

Figure 13.4 – Review Approved Overrides Screen

Annual Report Past Due Submittal – Override

At times an agency is faced with needing to submit their Annual Report after the designated due date with no changes are required to any reporting section. Select **Admin -> Begin an Override** in the left navigation menu. Select the **Enter Override Mode** buttons.

COPOS 2021 Report Override

Next Step: Enter Override Mode

Enter Override Mode

[Review Approved Overrides](#)

COPOS 2021 Report Override

Next Step: Enter Override Mode

Enter Override Mode

By clicking the button above, your agency will enter 'Override Mode' allowing edits to previous quarter data and targets in all report sections.

[Override Instructions](#)

Figure 13.5 – Begin an Override – Enter Override Mode for Past Due Report

Select the checkbox for “Agency has No New Changes. Just submitting a past due report” (**Figure 13.6**). Select the **Submit to DCED** button. A confirmation message box displays. Select the **Submit Override** button.

COPOS 2021 Report Override

Next Step: Add your changes to the appropriate Module(s)

Changes

#	Module	Item / Area	DCED Note / Agency Change	Revert
(none)				

Agency has No New Changes. Just submitting a past due report ☐

Justification

Submit To DCED

Discard Override

[Override Instructions](#)

Figure 13.6 – Begin an Override – Submit Override for Past Due Report

Organizational Standards

14. Organizational Standards

Introduction

As part of Pennsylvania's implementation of the national CSBG Organizational Standards (OSs), all CAAs are required to continuously complete the Organizational Standards year-round and strive for 100% compliance. The purpose of the Organizational Standards is to ensure that CAAs have the capacity to serve low-income individuals and the community effectively. The Organizational Standards tool will be used to assist in meeting all of the mandated OSs and act as a framework for determining training or technical assistance needs.

Select the **Organizational Standards** on the left navigation menu to display all OS related options. The details of these options are below.



Figure 14.1 – Organizational Standard Menu Options

Note: Organizational Standards have to meet four requirements to be considered “Met”:

1. The Standard must be selected as Met in the Edit View
2. The Standard must have associated documentation uploaded with reference information
3. Appropriate documentation types selected
4. The Executive Director must approve the Standard.

OS Report - Page Navigation and Details

At the top of the Organizational Standards page, a table of selectable buttons displays (Figure 14.2) that are shortcuts to those areas on the page. To go to the list of standards within a certain OS Goal, select the Goal name indicated in gray (Figure 14.1 – 1). To skip from the top of the page to a particular group of standards within a Goal, select the Category name indicated in blue (Figure 14.1 – 2).



Figure 14.2 – Goal and Category Shortcuts

Organizational Standards Report Page Layout

The layout of the OS Report page consists of each Standard with its own dropdown display. All Standards are in “quick view” (Figure 14.3), displaying each Standard and the Agency's compliance for each Standard. The OS Report page lists the Standards in order by the Goal (Figure 14.3 – 1) and Category (Figure 14.3 – 2). This view allows the user to scroll through and check agency OS compliance at a glance.

Select the down arrow (Figure 14.3 - 3) to see the “detail view” (Figure 14.4) that displays more information regarding the Standard. The “edit view” (Figure 14.5) allows for editing of OS information and managing OS documentation.

Maximum Feasible Participation ← 1

Consumer Input and Involvement ← 2

Standard 1.1 - The organization demonstrates low-income individuals' participation in its activities. ← 4

Awaiting ED Approval ← 5

6 → Annually ▼ ← 3

Figure 14.3 – OS Default Quick View

Figure 14.3 – 5 shows current compliance of a Standard. If a Standard was “Met” before November 2019, the status is retained unless it expires based on new timeframes or it is unapproved. Along with the wording, associated colors are used. A Standard’s compliance will be one of the following:

- Met Until – “Expiration of Compliance Date” (gold if within 90 days or green)
- Not Met (Out of Compliance as of) (red)
- Not Met (Needs Documentation) (red)
- Awaiting ED Approval (gold)
- N/A (standard is not applicable because the agency is a Public CAP. Some standards do not apply to public agency’s).

Figure 14.3 – 6 displays the expiration timeframe of the Standard. When the Standard box, or down arrow, is selected, the OS expands to display the “detail view” (**Figure 14.4**) with the arrow inverted (**Figure 14.4 – 1**) to indicate the Standard box has expanded. Standard information is in “read only” mode. To close the Detail View, select the Standard box or arrow again.

Once expanded, the Standard’s last Date of Compliance and approver’s initials display along with the date/time the Standard was last modified and by whom (**Figure 14.4 – 2**).

A list of checkboxes (**Figure 14.4 – 3**) displays the **Documentation Types** that can be used to indicate the organization satisfaction of the Standard.

Standard 2.3 - The department communicates its activities and its results to the community.

Met until 11/18/2021

Annually ▲ ← 1

Met: Yes ▼ Date of Compliance: 11/18/2020 Approval Initials: SA ← 2 → Modified 3/18/2021 9:23 AM by Test Tester No Alerts ▼

Acceptable Documentation ← 3

☒ The agency's public annual report

And any of the following

☒ Social media activity (Facebook page, Twitter account, etc.)

☒ News release copies

☒ Community event information

Add Document: --Select-- Add

Documentation For This Standard: ← 4

[2019 Tripartite Advisory Board Meeting Ad.pdf](#) 1 Reference: 1 ← 5

[Screen_Shot_2021-03-03_at_125043_PM.png](#) 1 Reference: 1

[The Monthly CAAmunicator November 2019.pdf](#) 1-6 Reference: 1-6

[The Monthly CAAmunicator October 2019.pdf](#) 1-6 Reference: 1-6

[The Monthly CAAmunicator September 2019.pdf](#) 1-6 Reference: 1-6

[The Monthly CAAmunicator April.pdf](#) 1-5 Reference: 1-5

[The Monthly CAAmunicator June 2020.pdf](#) 1-9 Reference: 1-9

Notes: ← 6

(none)

7 → [Edit | Manage Documents](#) ← 8

9 → No Alerts ▼

Figure 14.4 – Detail View

Below the list of Documentation Types, documents uploaded and associated with the Standard (**Figure 14.4 – 4**) display. To the right of each uploaded document is a **Reference** note (**Figure 14.4 - 5**), which must be added, to provide

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information about the section of the document used to meet the Standard. Notes entered are displayed in the **Notes** section (**Figure 14.4 – 6**). **Note:** Manage Documents (**Figure 14.4 – 8**) details are provided later in this section.

Organizational Standard Alerts

Figure 14.4 – 9) shows an Alerts dropdown box. “No Alerts” is the default. The intent of setting an alert is to notify the Executive Director, Local Admins and Users with OS access that an action may need to be taken (i.e., update documentation, schedule an audit, etc.). One or more Alerts for each OS can be set or changed at any time by the agency Executive Director.

Note: There is one alert created for each time frame (which all users with access to this standard will see). These alerts must be worked manually by one of the users, as there is generally no action taken within COPOS.

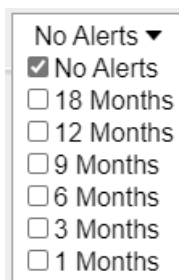
A dropdown menu for selecting alert frequency. The menu is open, showing options: 'No Alerts' (selected with a checkmark), '18 Months', '12 Months', '9 Months', '6 Months', '3 Months', and '1 Months'.

Figure 14.5 – OS Alert Selections

Edit Organizational Standards

When the Edit link in a Standard is selected, a Help link displays. When selected a pop-up box displays detailed information about the Standard and getting it to compliance.

If an OS is “Awaiting ED Approval” and the **Edit** link is selected:

- Met can be changed to No if the Standard is not met
- Date of Compliance can be changed to when the Standard is met
- Documentation can be added or deleted
- Documentation Reference information can be changed
- Notes can be added, changed, or deleted.

Standard 2.1 - The department has documented or demonstrated partnerships across the community, for specifically identified purposes; partnerships include other anti-poverty organizations in the area.

Awaiting ED Approval

Met: Yes ▾ Date of Compliance: 11/18/2020 Approval Initials: SA Approve Help

Acceptable Documentation

Both of the following:

- ☒ A list of the agencies and/ or primary partnerships
- ☒ Samples of documents such as MOUs and/or contracts that document the partnerships

Select documents to be added by:

Date Added ☐ Document Name ☒ Document Type --Select-- ▾

Add Document: --Select-- ▾ Add

[Upload New Document](#)

Documentation For This Standard:

✕ [2015-20 PA Dept SFPP agremt SC.pdf](#) Reference(2) 1-36

Figure 14.6 – Edit OS Awaiting ED Approval

If an OS is “Met” or “Met until” and the **Edit** link is selected, an **Undo Approval** button displays by the Approval Initials (**Figure 14.7**). The **Undo Approval** button must be selected to make changes, as listed above, to the Standard. The

Approval Initials box is editable and the initials can be changed by the individual approving the OS (ED or Delegate) as necessary.

Not Met (Out of Compliance as of 9/9/2019)

Met: Yes ▾ Date of Compliance: 9/9/2019 Approval Initials: DB Undo Approval [Help](#)

Acceptable Documentation

***You must select appropriate Documentation Type(s).**

Both of the following:

- * ☐ Risk assessment instrument and results
- * ☐ Board Meeting Minutes

Select documents to be added by:

Date Added ☐ Document Name ☒ Document Type --Select-- ▾

Add Document: --Select-- ▾ Add

Figure 14.7 – Edit OS Awaiting ED Approval

Organizational Standard Notes

Written clarifications can be added within each Standard by adding Notes (**Figure 14.8**). To create a new note associated with a Standard, select the **Edit** link then enter the information in the **Notes** textbox. When finished, select the **Add** button under the Notes box. The note, along with the date and time, are added and displayed above the textbox.

Notes:

Add

[Save](#) [Cancel](#) [Manage Documents](#)

Figure 14.8 – Organizational Standard – Add Notes

Notes can be edited after they have been created. Select the **Edit** link (**Figure 14.9**) to display and make changes to the note. The **Edit** and **Delete** links change to **Update** and **Cancel** links. Select **Update** to save change to the note. Select the **Cancel** link to not save the note changes. The textbox closes and the **Edit** and **Delete** links display.

To delete an existing note, select the **Delete** link (**Figure 14.9**).

Notes:

[Edit](#) [Delete](#) adding a note - 9/10/2021 - 1:34:24 PM

Add

Figure 14.9 – Organizational Standard – Edit-Delete Notes

Uploading Organizational Standards Documentation

To upload documents to a Standard, select the **Edit** link, and **Undo Approval** button if needed. The Acceptable Documentation provides guidance as to what needs to be uploaded and associated with the Standard. Examples include: Any of the following, Both of the following, a document type and OR any of the following, or a list of one document type.

To associate a document that has already been uploaded with the Standard, select either by **Date Added**, **Document Name** (default), or **Document Type** (Figure 14.10). Select the **Add Document** dropdown to view a list of already uploaded agency documents sorted by Date Added or Document Name or a list of documents “tagged” with the selected Document Type. If the document is found, select it, and then select the **Add** button. The document name displays in the Documentation For This Standard list and requires entry of a Reference note. If the document name is not displayed, select the **Upload New Document** link which displays the Manage Documentation Upload Documents page (Figure 14.11).

Document Type: The list of Document Types was derived from the Org Standard Goals and Categories. Though not required, selecting a Type when uploading a document provides an additional way to sort and search for documents, as well as providing a date when this document will be automatically “archived” in COPOS.

Document Status: Assigned is the default status which indicates the document is assigned to an Org Standard (which is noted above this field. The other status is **In Progress**. This status is used as an indicator to the agency to associate the document to additional Standards.

After navigating to and selecting a document, select the **Upload** button. The Manage Documentation screen closes and the Standard with the document name in the Documentation For This Standard displays.

Additional documentation about uploading and managing documents are in the [Manage Documents](#) section.

Select documents to be added by:
 Date Added ☐ Document Name ☒ Document Type
 Add Document:
[Upload New Document](#)
 Documentation For This Standard:
 X [1152020_CAA_TriAdv_Mtg_Minutes.pdf](#) Reference(2) *required

Figure 14.10 – Organizational Standard – Acceptable Documentation

Manage Documentation

Manage Active Documents Manage Archived Documents Organizational Standards View **Upload Documents**

Document Type:

Note: Document(s) will be automatically uploaded to OS 1.1

Document Status:

Drag Files Here

Or select a file: No file chosen

Files uploaded to COPOS must meet the following criteria:
 Files must have one of the following file extensions:
[.one](#) [.pdf](#) [.xls](#) [.xlsx](#) [.xlsb](#) [.doc](#) [.docx](#) [.ppt](#) [.pptx](#) [.pps](#) [.gif](#) [.png](#) [.jpg](#) [.jpeg](#)
 The filename may not contain the following characters:
 . ' " / \ -- & % # \$

Figure 14.11 – Organizational Standard – Upload Documents

Organizational Standards Approval

The Executive Director's approval is required for a Standard to be in compliance. To approve (**Figure 14.12**):

- Select the **Edit** link in the Standard
- Select **Yes** from the Met dropdown list
- Enter the Date of Compliance,
- Enter Approval Initials
- Select the Approve button (which "locks" the information and confirms the approval).

Standard 1.1 - The department demonstrates low-income individuals' participation in its activities

Awaiting ED Approval

Met: Date of Compliance: Approval Initials: [Help](#)

Figure 14.12 – Agency ED Organizational Standard Approval

Organizational Standards History

A 12-month history of an agency's Organizational Standards (**Figure 14.13**) is available by selecting **Organizational Standards** then **OS History** on the left navigation menu. The page provides a snapshot of the compliance status for the Agency over the last 12 months while the Met and Not Met numbers are totals for 24 months from the latest date. Not Met includes Org standards with a status of Awaiting ED Approval and Not Met. The latest reporting month is displayed in the right most cell.

At the top of the OS History page, a table displays showing each month's overall compliance percentage. The average of the past 12 months' compliance percentages is shown in the leftmost column of this table.

Select the **Download** link to create a PDF report of the history information. Select the **Send As Email** link to send an e-mail to yourself with the PDF report as an attachment. Select a different month/year from the **Select Date** dropdown to change the 12-month timeframe.

Agency Name Here - Organizational Standards History														
Generated: 12/6/2021 2:24:23 PM														
AA - Awaiting Approval														
Total Percentage of Standards Met Over 12 Month History	Met	Not Met	12/31	1/31	2/28	3/31	4/30	5/31	6/30	7/31	8/31	9/30	10/31	11/3
98.85%	98.85%	1.15%	100.00%	100.00%	98.28%	100.00%	98.28%	100.00%	96.55%	100.00%	100.00%	93.10%	100.00%	100.00%
Maximum Feasible Participation														
	2020				2021									
Category one: Consumer Input and Involvement	Met	Not Met	12/31/2020	1/31/2021	2/28/2021	3/31/2021	4/30/2021	5/31/2021	6/30/2021	7/31/2021	8/31/2021	9/30/2021	10/31/2021	11/30/2021
Standard 1.1 - The organization demonstrates low-income individuals' participation in its activities.	24	0	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met
Standard 1.2 - The organization analyzes information collected directly from low-income individuals as part of the community assessment.	23	1	Met	Met	Met	Met	Met	Met	Met	Met	Met	Not Met	Met	Met
Standard 1.3 - The organization has a systematic approach for collecting, analyzing, and reporting customer satisfaction data to the governing board.	22	2	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met	Met
	2020		2020	2021										

Figure 14.13 – Organizational Standards History Page

15. Manage Documentation

The Manage Documentation page allows you to manage, organize, and associate your agency's OS Documentation. Access the page from the Navigation Menu by selecting the **Organizational Standards** - > **Manage Documentation** link. If a Standard is open on the OS Report page, access the page within each Standard by selecting the **Manage Documents** link within the Documentation section.

Navigating the Page

There are four tabs under the page header: Manage Active Documents, Manage Archived Documents, Organizational Standards View, and Upload Documents. Selecting a tab changes the options available on the page as well as updates the header text to indicate the active tab.

Search Documents

Active, Archived, and Organizational Standards View documents can be searched by entering one or more words in the Search Documents box and/or selecting a Document Type. Select the Search button to display any results found. When documents are searched using text, the text is highlighted in yellow. Selecting a different tab displays the search results for documents within that tab. Select the **Clear** link to remove the search text and refresh the display of the tab's documents.

Manage Documentation						
<div>Manage Active DocumentsManage Archived DocumentsOrganizational Standards ViewUpload Documents</div>						
Search Documents: Survey Search Clear						
Search Document Type: All						
Name	Document Type	Status	Upload Date	Archival Date	Move to Active	Manage
2015 Board Survey.pdf			2/11/2016	9/7/2021		
2015 Client Satisfaction Survey Results.xls			2/11/2016	5/10/2019		
2015 Client Survey.pdf			2/11/2016	9/7/2021		

Figure 15.1 - Document Search Results

Managing Documents

There are four (4) ways to manage documentation related to Organizational Standards:

1. In the Org Standard, selecting the **Manage Document** link
2. In the left navigation menu, select **Organization Standards** then **Manage Documentation**.
3. In Manage Archived Documents, select the **Move to Active** checkbox to return the document to an active status.
4. In Manage Active Documents, select the **Archive Now** icon to immediately archive the document.

Selecting the Manage Active Documentation tab displays a list of the agency's active documents (**Figure 15.2**).

Documents can be managed by associating them with Standards or archiving them if no longer relevant. Documents can be searched using keywords and/or selecting a Document Type ("All" is the default type).

Selecting a column name link sorts the documents in ascending/descending order by that column's information.

Document Type is selected when a document is uploaded or when editing the document details. The Types are derived from the Organizational Standards Categories and Goals.

A **Status** is selected when a document is uploaded or when editing the document details. The statuses are:

- **PA:** Pending Assignment - Added to COPOS in an unassigned status – document was added without updates to any Org Standard. This is default status until associated to at least one OS.
- **A:** Assigned - One or more Standards have been assigned. This is the default when one or more Standards are associated.

- **IP:** In Progress – This is user assigned when assigning one Standard and want to add other Standards at a later time. This status can act as another method of locating documents quickly in order to add the document to additional Standards.
- **U:** Unassigned – Documents were assigned to this Standard and now unassigned (generally these documents are eligible for archiving).

The **Archival Date** was set at 09/07/2021 for any document which was automatically archived through a batch process on 9/7/2021 (**Figure 15.3**). When a document is assigned a “Document Type”, an archival date is automatically determined based upon the associated Document Type. Every day a batch process runs to archive documents. The process will only archive documents are on or past their Archival Date and are not currently associated with an Organizational Standard. The documents which are archived are viewable in the **Manage Archived Documents** tab.

Associated OS displays all Org Standards the document is currently associated to. The **Archive Now** icon does not display for a document that is associated with one or more Org Standards. When a document is not associated to an Org Standard, the Archive Now icon displays. Selecting the icon immediately archives the document.

Detailed information when selecting the Manage icon and when managing an Organizational Standards’ documents is provided below.

Manage Documentation							
Manage Active Documents		Manage Archived Documents		Organizational Standards View		Upload Documents	
Search Documents:		<input type="text"/>		Search		Clear	
Search Document Type:		All					
Name	Document Type	Status	Upload Date	Archival Date	Associated OS	Archive Now	Manage
Aggregate_OS_Compliance.pdf	Data and Analysis	IP	9/3/2021	12/3/2022			
COPOS_Agency_Questionnaire - Question Text...		IP	9/1/2021				
COPOS_Agency_Questionnaire - Draft.pdf		IP	9/1/2021				
COPOS_2020_Complete_Report_-Union-Snyder_C...			3/15/2021		9.4		
Audit_Submission_accepted.docx			3/11/2021		8.1		
Audit_Submission_received.docx			3/11/2021		8.1		
Screen_Shot_2021-03-03_at_125043_PM.png			3/10/2021		2.3		
EMPLOYEE_HANDBOOK_for_2021.pdf			3/4/2021		4.5, 7.2, 7.4, 7.5, 7.6, 7.8		

Figure 15.2 - Manage Documentation – Active Documents

Manage Documentation

Manage Active Documents

Manage Archived Documents

Organizational Standards View

Upload Documents

Search Documents:

Search

Clear

Search Document Type:

All

Name	Document Type	Status	Upload Date	Archival Date	Move to Active	Manage
2015 Client Survey.pdf			2/11/2016	9/7/2021		
2015 Board Survey.pdf			2/11/2016	9/7/2021		
Health Partners results.pdf			2/11/2016	9/7/2021		
AR 2014 FINAL.pdf			2/11/2016	9/7/2021		

Figure 15.3 - Manage Documentation – Archived Documents

Manage Active Documents

To associate a document with one or more Standards, add reference text, or share the document with other agencies, select the **Manage** icon (✎) (**Figure 15.3**) to display the Document Details pop-up box (**Figure 15.4**). All Organizational Standards associated with the document display.

Title: Selecting the document title displays the document.

Upload Date: The date the document was uploaded and the user's name who uploaded the document.

Archive: For active documents, **Archive Document** and **Replace Document** links are available. Both links archive the document; however, the Replace Document link allows the user to choose another active document from a dropdown list to associate with the same Standard(s).

Archive: An archived document (**Figure 15.5**) displays the date archived and who archived the document. Select the **Restore** link to make the document active and display on the Active Documents tab.

Document Type: If desired for easier searching and archival purposes, select the type of document from the dropdown list.

Change File Name: If desired, the agency document name can be changed to something more "meaningful"/"understandable" for COPOS users. Enter the name in the box. Note: The name change occurs in every location within COPOS.

Share: Selecting "Yes" allows the document to appear on the "Shared Documents" page for other agencies to reference when creating similar documents.

Title: [1152020_CAA_TriAdv_Mtg_Minutes.pdf](#)

Upload Date: 11/18/2020 by

Archive: [Archive Document](#) [Replace Document](#)

Document Type: --Select--

Change Filename To: 1152020_CAA_TriAdv_Mtg_Minutes .pdf *Changing File Name changes every location in COPOS

Share: ☐

Add To Standard: --Select--

Associated Standards:

- Standard 1.1 (public) - The department demonstrates low-income individuals' participation in its activities. *required for Standard Approval X
- Standard 5.5 (public) - The department's tripartite board/advisory body meets in accordance with the frequency and quorum requirements and fills board vacancies as set out in its governing documents. 1-3 X
- Standard 5.9 (public) - The department's tripartite board/advisory body receives programmatic reports at each regular board/advisory meeting.

Figure 15.4 - Edit Active Document Information

Title: [1.19.17 DA Task Force Minutes_148.docx](#)

Upload Date: 7/11/2017 by System Administrator

Archive Date: Archived on 6/25/2020 by Christine Hart [Restore Document](#)

Document Type: --Select--

Change Filename To: 1 .docx *Changing File Name changes every location in COPOS

Share: ☐

Add To Standard: --Select--

Associated Standards:

Figure 15.5 - Edit Archived Document Information

Add to Standard: The dropdown lists all Standards applicable to the agency. When selected, the Standard number and its associated text display. To associate it to the selected Standard, enter a Reference (page numbers, sections, or entire document) and select the **Add** button. The Standard information displays as an **Associated Standard**. If the Standard is approved by the Executive Director, an error pop-up box displays (**Figure 15.6**). Select the **Continue** button to unapprove the Standard and associate the document to it. **Note:** The Executive Director must approve the Standard again. Selecting the **Cancel** button keeps the Standard approved and will not associate the document with the Standard.

Associated Standards: Lists Standards that are currently associated with the document. To remove a Standard, select the **X** icon to the right of the Standard (**Figure 15.4**).

Note: Many of the actions listed above cause Associated Standards to become unapproved. When this occurs, a warning similar to **Figure 13.4** displays. Selecting the **Continue** button unapproves the affected Standard(s) and continues the action. Selecting the **Cancel** button leaves the Standards approved and prevents the action.

The Standard you are attempting to associate this Document with has been **Approved** by your Organization's Executive Director. If you continue with this action, the Standard will become **Unapproved** and require your Executive Director to **Re-Approve** it. Would you like to continue?

Continue
Cancel

Figure 15.6 – Approved Standard – Add Document Info Message for ED to Approve

Manage Archived Documents

To manage archived agency documents, select the **Manage Archived Documents** tab (**Figure 15.7**). The information view is similar to the “Manage Active Documents” view but displays only archived documents. The search, sort, and manage features work the same as with Active documents.

If needed, a document can be restored to being active by selecting the **Move to Active** icon.

Manage Documentation						
<div> Manage Active Documents Manage Archived Documents Organizational Standards View Upload Documents </div>						
Search Documents: <input type="text"/> Search Clear						
Search Document Type: All						
Name	Document Type	Status	Upload Date	Archival Date	Move to Active	Manage
COPOS_2020_Complete_Report_-Union-Snyder_C...			3/4/2021			
CAA_Community_Needs_Assessment.pdf			1/28/2021	2/17/2021		
54_Board_Mtg_Minutes.pdf			11/18/2020	11/18/2020		
Board_Membership_Module_completed_and_upda...			10/28/2020	10/28/2020		

Figure 15.7 – Manage Archived Documents

Organizational Standards View

Select the Organizational Standards View tab to display a list of all Org Standards having associated documents (**Figure 15.8**). Information displays in OS order then by document Upload Date and document Name order. Select the document name link to view the document.

The search, sort, and manage features work the same as with Active documents.

Manage Documentation						
<div> Manage Active Documents Manage Archived Documents Organizational Standards View Upload Documents </div>						
Search Documents: <input type="text"/> <input type="button" value="Search"/> Clear						
Search Document Type: <input type="text" value="All"/>						
OS	Name	Document Type	Status	Upload Date	Archival Date	Manage
1.1	Focus_Group_Meeting_Notes_511.pdf			6/2/2021		
	May_BOD_Meeting_Minutes_Focus_Groups.pdf			6/2/2021		
1.2	Client Focus Groups for Needs Assessment M...			7/5/2019		
	Blueprints CNA Abridged - 2019 FINAL-proce...			12/9/2019		
	Waynesburg Focus Group 62619 notes.pdf			12/9/2019		
1.3	Blueprints Client Satisfaction Survey 2018...			5/10/2019		
	2018 Client Satisfaction Summary.pdf			5/10/2019		
	CSC Mtg Min 04292019-jtf.pdf			7/5/2019		

Figure 15.8 – Organizational Standards View Documents

Upload Documents

COPOS removes special characters or symbols (&, #, @, etc.) from filenames during the upload process. As a result, if the original filename contains special characters or symbols, they will not display in the file name stored in COPOS.

There are two ways to upload documents:

1. Use the “Drag and Drop” to drag in and upload up to five (5) files. **NOTE: Prior to dragging a file, select the appropriate Document Type and Document Status – Pending Assignment is the default. Once a file is dragged to the blue box, it is immediately saved (unless there is an error) and displays in the Upload Documents tab.**

A message line displays for each file uploaded (**Figure 15.10**). If the text is green, the file uploaded successfully. If the text is red, the file upload was not successful and information on why it failed is provided.

Manage Documentation

Manage Active Documents
Manage Archived Documents
Organizational Standards View
Upload Documents

Document Type: --Select--
Document Status: Pending Assignment

Drag Files Here

Or select a file:
No file chosen

Files uploaded to COPOS must meet the following criteria:

Files must have one of the following file extensions:
[.one](#) [.pdf](#) [.xls](#) [.xlsx](#) [.xlsb](#) [.doc](#) [.docx](#) [.ppt](#) [.pptx](#) [.pps](#) [.gif](#) [.png](#) [.jpg](#) [.jpeg](#)

The filename may not contain the following characters:
. ' " / \ -- & % # \$

Figure 15.9 - Upload Documents Tab

Manage Documentation

Manage Active Documents
Manage Archived Documents
Organizational Standards View
Upload Documents

Document Type: --Select--

Document Status: Pending Assignment

18.5 KB

Orgs - Servi...

Or select a file: Choose File No file chosen

Upload

Orgs - Service Areas - 06102021.xlsx uploaded successfully

Figure 15.10 - Drag and Drop Document Upload Results

2. Select the **Choose File** button (**Figure 15.9**) to navigate and select a file. **NOTE: Prior to selecting the Upload button, select the appropriate Document Type and Document Status – Pending Assignment is the default.** If desired, the agency document name can be changed to something more “meaningful”/“understandable” for COPOS users. Enter the name in the box. Note: The name change occurs in every location within COPOS. To complete the upload, select the **Upload** button.

Manage Documentation

Manage Active Documents
Manage Archived Documents
Organizational Standards View
Upload Documents

Document Type: --Select--

Document Status: Pending Assignment

Drag Files Here

Or select a file: Choose File Org Names ...ce Areas.xlsx

Change File Name to: Org Names - Counties -Service Areas .xlsx

Upload

Figure 15.11 – Choose Document Upload Results

Document Sharing

Executive Directors, Local Administrators, and Users with Organizational Standards access permissions have the ability to access **Shared Documents (Figure 15.12)**. The **Shared Documents** can be accessed by selecting **Shared Documents** under Organizational Standards in the left navigation menu.

Documents marked as shared on the Manage Documentation page can be viewed by all agencies. The documents are grouped by the Standards in which they are associated – this can cause a document to appear multiple times as seen for “2016 Community Needs Assessment.pdf” in **Figure 13.8**. The sharing agency name and Contact Phone number are provided to allow users to easily contact each other if there are any questions about a shared document.

Standard	Document	Shared By	Contact Phone	Upload Date
(none)	Community Action, Inc. Employee Handbook - Edited March 10, 2017.pdf	Community Action, Inc.	(814) 938-3302	04/24/2017
(none)	Facebook.png	Community Action, Inc.	(814) 938-3302	10/27/2017
(none)	CSBG 2015 Needs Assessment Approved 12-14-15.pdf	Allegheny County Department of Human Services		02/12/2016
Standard 1.1 (private)	0c - HR Checklist for New Hire 04-25-2017.pdf	Community Action, Inc.	(814) 938-3302	05/24/2017
Standard 2.2 (private)	2016 Community Needs Assessment.pdf	Community Action, Inc.	(814) 938-3302	06/09/2017
Standard 2.4 (private)	SDD Volunteer Tracking 2016_11.xlsx	Westmoreland Community Action	(724) 834-1260	03/14/2017
Standard 3.2 (private)	2016 Community Needs Assessment.pdf	Community Action, Inc.	(814) 938-3302	06/09/2017
Standard 3.3 (private)	2016 Community Needs Assessment.pdf	Community Action, Inc.	(814) 938-3302	06/09/2017

Figure 15.12 – Shared Documents

Send Backs and Discretionary Requests

16. Agency Send Backs

To significantly reduce the need for e-mails between DCED and agencies during the review of the OCS Cleansing Memos, DCED has the capability of doing a Send Back on each section of the Annual Report (**Figure 16.3**). A Send Back can be done at other times as deemed necessary by DCED.

If the agency has a current active/pending override in a different report year, a Send Back cannot be done until the override is complete or discarded.

Note: A send back can be done for agency Organizational Standard. This send back is not part of the reporting year Send Back process and is discussed in the Organizational Standards Send Back section.

Agency Send Back Processing

Along with the Send Back e-mail, which notes when the Send Back is to be returned to DCED, the agency Executive Director and Local Admins receive a dashboard alert. Select the Alert Send Back Override link or select **Admin** then **Review Override** in the left navigation menu to display the information (**Figures 16.8 and 16.9**).

My Alerts				
My Active Alerts My Hidden Alerts My Worked Alerts				
My Active Alerts				
Alert	Description	Created Date	Worked	Hide
2021 Send Back Override	Review Needed	9/13/2021	X	X

Figure 16.7 – Agency Send Back Dashboard Alert

For Local Admins and Users with access, the Submit to ED button is active when all Send Back items have been processed (**Figure 16.8**).

[Review Approved Overrides](#)

COPOS 2021 Report Override

Next Step: Enter additional changes as needed and then advise your Executive Director to submit to DCED

Changes

#	Module	Item / Area	DCED Note / Agency Change	Revert
1	Module 4: A (Quarterly)	FNPI 7a The number of individuals who achieved one or more outcomes as identified by the National Performance Indicat...	Please enter the numbers.	
		Third Quarter - Total Participants Enrolled in Program(s)	0 → 340	<input type="checkbox"/>
		Third Quarter - Total Participants Achieving Outcome	0 → 330	<input type="checkbox"/>
		Question Notes	This is a supporting note.	<input type="checkbox"/>
2	Module 4: A (Quarterly)	FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.		
		Second Quarter - Total Participants Enrolled in Program(s)	7 → 10	<input type="checkbox"/>
		Second Quarter - Total Participants Achieving Outcome	4 → 5	<input type="checkbox"/>

Note: Once this override is approved by DCED, the following reports will be automatically submitted for your agency:

- Third Quarter
- Fourth Quarter

Justification

Submit To EDDiscard Override

Figure 16.8 – Local Admin or User Send Back – Submit to ED Button

The agency Executive Director (or an Annual Report Delegate) must submit the Send Back to DCED. When all Send Back items have been processed, the Submit to DCED button is active.

[Review Approved Overrides](#)

COPOS 2021 Report Override

Next Step: Enter additional changes as needed and then click Submit to DCED

Changes

#	Module	Item / Area	DCED Note / Agency Change	Revert
1	Agency Highlights	Describe the first of three management accomplishments achieved by your agency during the reporting year. Be sure to...	Please update information to reflect actions.	
2	Module 2	B.3a.1. Of the above, the total number of volunteer hours donated by individuals with low-incomes	Please update numbers.	
3	Module 4: A (Quarterly)	FNPI 7a The number of individuals who achieved one or more outcomes as identified by the National Performance Indicat...	Please enter the numbers.	
4	Module 4: B	SRV 4c Rent Payments (includes Emergency Rent Payments)	Please update payment data.	
5	Module 4: C	C.1.b. Female	Please include counts.	
6	Module 4: A (Quarterly)	FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.		
		Second Quarter - Total Participants Enrolled in Program(s)	7 → 10	<input type="checkbox"/>

Note: Once this override is approved by DCED, the following reports will be automatically submitted for your agency:

- Third Quarter

Justification

Submit To DCED

Discard Override

Figure 16.9 – Agency ED Send Back Table of Information

When the Item / Area information is extensive, hover over the link to display the full description. Select the Item/Area link to return to the question which has a red border to easily identify it as a send back item (**Figure 16.10 - 1**). Once changes are made within the item, the red box around the item is removed (**Figure 16.11**). The change(s) and any notes added/updated display in the Override Changes table (**figure 16.12**). To undo the change, select the associated Revert box. A link displays about the Changes table showing the number of items selected to revert (**Figure 16.13**). Select the Revert link remove the item from the Changes table and undo the change.

FNPI 7a The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains			← 1	First Quarter	Second Quarter	Third Quarter	Final
			Enrolled	162	325	0	0
▼ Additional Details	Target	0	Achieving	162	325	0	0

Figure 16.10 – Send Back Item with Red Border

FNPI 7a The number of individuals who achieved one or more outcomes as identified by the National Performance Indicators in various domains				First Quarter	Second Quarter	Third Quarter	Final
			Enrolled	162	325	340	0
▼ Additional Details	Target	0	Achieving	162	325	330	0

Figure 16.11 – Send Back Item – Changes Made - No Red Border

Changes				
#	Module	Item / Area	DCED Note / Agency Change	Revert
2	Module 2	B.3a.1. Of the above, the total number of volunteer hours donated by individuals with low-incomes	Please update numbers.	
3	Module 4: A (Quarterly)	FNPI 7a The number of individuals who achieved one or more outcomes as identified by the National Performance Indicat...	Please enter the numbers.	
		Third Quarter - Total Participants Enrolled in Program(s)	0 → 340	<input type="checkbox"/>
		Third Quarter - Total Participants Achieving Outcome	0 → 330	<input type="checkbox"/>
		Question Notes	This is a supporting note.	<input type="checkbox"/>

Figure 16.12– Send Back Changes Display in Table

Changes				
Revert 1 Selected Change(s)				
#	Module	Item / Area	DCED Note / Agency Change	Revert
2	Module 2	B.3a.1. Of the above, the total number of volunteer hours donated by individuals with low-incomes	Please update numbers.	
3	Module 4: A (Quarterly)	FNPI 7a The number of individuals who achieved one or more outcomes as identified by the National Performance Indicat...	Please enter the numbers.	
		Third Quarter - Total Participants Enrolled in Program(s)	0 → 340	<input type="checkbox"/>
		Third Quarter - Total Participants Achieving Outcome	0 → 330	<input type="checkbox"/>
		Question Notes	This is a supporting note.	<input checked="" type="checkbox"/>

Figure 16.13– Send Back Change Selected to be Reverted

When all changes are addressed, enter a supporting note in the Justification box and select the **Submit to DCED** button. The DCED System Admins receive a dashboard alert to review the agency's responses.

17. Discretionary Funding Request

Each agency will enter their agency requests for Discretionary Funding within COPOS, submit it to DCED for review and process (or sent back for updates). Agency users have the **Work Plan/Discretionary** selection on their left navigation menu starting with the 2022 report. As long as Discretionary Funds are available, new requests can be submitted to DCED.

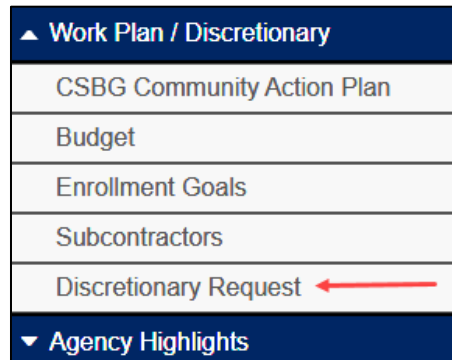


Figure 17.1 – Discretionary Request Menu Option

Select the **Insert New Discretionary Request** link (Figure 17.2) to initiate the process. The information is very similar to the Work Plan CSBG Community Action Plan (CAP) and Budget sections.

Discretionary Requests			
Instructions			
Discretionary Requests			
Name	Status	Request Amount	Processed Amount
(No Discretionary Requests Found)			
Insert New Discretionary Request		View Deleted Requests	

Figure 17.2 – Discretionary Request Menu Option

Section 1: Enter the request Name and the funding amount requested. Information must be entered in at least row A and in each block in the row (Figure 17.3). If not entered, an error message and/or a block outlined in red will display after a COPOS user selects the **Save** button (Figure 17.4). The Work Plan may be saved with errors. All errors must be corrected prior to submission to DCED.

<input type="button" value="Save"/>		
Request for Discretionary Community Services Block Grant Funds		
Name: <input type="text"/>		
Amount: \$ <input type="text"/>	Processed Amount: \$ <input type="text"/>	
CSBG Discretionary Funds are used to fund projects and services operated by Community Action Agencies that are outside the scope of the normal CSBG Annual Work Plan.		
1.) In the columns below, list needs that this CSBG Discretionary Funds will address; available community or agency programs that the new project will coordinate with; and the programs the agency will operate with CSBG Discretionary Funding to respond to those needs.		
Identified Need	Existing or Anticipated Community/Agency Programs	Funded Program / Service / Strategy
A.) Click or tap here to enter text 0/150	Click or tap here to enter text 0/150	Click or tap here to enter text 0/150
B.) Click or tap here to enter text	Click or tap here to enter text	Click or tap here to enter text

Figure 17.3 – Discretionary Request

Figure 17.3 – Discretionary Request – Section 1 Error Example

COPOS allows for up to 7 “needs” rows to be entered. If an agency has more than 7 needs, consider combining needs which are closely related into a single need with 2 parts.

If an agency has one need with many different programs and services, it is feasible to enter the same need in two rows while being sure to provide full information for each row (Need, Programs, and Funded Programs, Service, and Strategy).

Section 2: In 200 characters or less, enter two or three agency goals that are Specific, Measurable, Achievable, Realistic, and Timely (SMART). The agency may have one to three goals for each discretionary request. An error message will display when the **Save** button is selected and at least one goal does not have information. If the agency has more than 3 goals, the additional goals will need to be entered under the other questions or combined within the 3.

Figure 17.4 – Discretionary Request – Section 2 SMART Goal Entry

Sections 3 - 5: Information must be entered into each section (**Figure 17.5**). An error message will display when the **Save** button is selected and a section does not have information.

3.) Describe the programs, projects, and services the agency will operate with CSBG Discretionary Funds. Include information on the strategies to be used and specific outcomes which are expected based on the above goals .
Click or tap here to enter text
0/2500
4.) Community Partnerships: A) Describe the agency's work with any partnerships on this project (if other partners will be working with the agency on this project). AND B) Describe work completed to benefit the partnerships and ensure that services, programs and projects are not duplicated and all available resources are leveraged to the ultimate advantage.
Click or tap here to enter text
0/2500
5.) The agency will be completing a CSBG Discretionary Funds Budget template (below). For this question, provide a narrative which supports the use of the CSBG Discretionary Funds the agency is requesting. Note: Please describe how the funds will be used without specific dollar values. The agency may reference specific line items in the budget, as appropriate.
Click or tap here to enter text
0/1500

Figure 17.5 – Discretionary Request – Sections 3 - 5

The agency may upload one or more documents to support the Discretionary Request (**Figure 17.6**). Selecting the Upload New Document link displays the agency's Manage Documentation Upload Documents screen. Uploaded documents display in the box. If information on the upload documents process is needed, refer to the Managing Documents section.

Use This Section to Upload Additional Discretionary Documents

Select a PDF Document to be added:

Date Added ☐ Document Name ☒ Document Type

[Upload New Document](#)

Documentation for this Discretionary Request:

(none)

Figure 17.6 – Discretionary Request – Manage Documents

Budget: The second section of a Discretionary Request is the Budget information. For each applicable area enter the amount being requested. If needed, enter a description in a category box and then the associated amount.

<input type="button" value="Save"/>	
	Discretionary Amount
MACHINERY & EQUIPMENT	
Equipment Purchase	0
<input type="text"/>	0
<input type="text"/>	0
<input type="text"/>	0
<input type="text"/>	0
<input type="text"/>	0
Total Machinery & Equipment	0
OPERATING COSTS/WORKING CAPITAL	
Salary & Fringe (by position):	
Executive Director	0
Assistant Director(s)	0
Fiscal Director	0
<input type="text"/>	0
<input type="text"/>	0

Figure 17.7 – Discretionary Request – Budget

If the Total CSBG Program total does not = the entered Amount of the Request, the cell displays in red (Figure 17.9).

Request for Discretionary Community Services Block Grant Funds	
Name:	<input type="text" value="Agency Discretionary Request 1"/>
Amount:	<input type="text" value="\$6525"/> <input type="text" value=""/>
	Processed Amount: \$0 <input type="text" value=""/>

Figure 17.8 – Discretionary Request Requested Amount

<input type="text"/>	0
Total Other Costs	0
TOTAL CSBG PROGRAM	5000
<i>Add Comments to include with e-mail to DCED</i>	
<input type="text"/>	
<input type="button" value="Submit to DCED"/>	<input type="button" value="Save"/>

Figure 17.9 – Discretionary Request – Budget Entered Amount Not = Requested Amount Error

When the Total CSBG Program total does = the entered Amount of the Request, the cell does not display in red.

<input type="text"/>	0
Total Other Costs	0
TOTAL CSBG PROGRAM	6525

Figure 17.10 – Discretionary Request – Budget Entered Amount = Requested Amount - No Error

A Comment can be entered into the box to provide DCED any additional information about the Request. After the **Save** button is selected and no errors display, the **Submit to DCED** button is active.

Add Comments to include with e-mail to DCED	
Submit to DCED	Save

Figure 17.11 – Discretionary Request – Comment Entry Box

DCED receives an alert and e-mail notification and reviews the agency's Discretionary Request information. DCED will **Process Discretionary Funds** or **Deny Funding**. As part of processing the funds, DCED enters the Process Amount. If DCED has questions/issues with information provided, a Comment is entered and the funding is denied and returned to the agency for updates.

Selecting the **View** link to displays the Discretionary Request for reading. The **Edit** link displays before submitting to DCED or if returned by DCED. Selecting the link allows changes to be made.

An agency is able to delete an unprocessed Request (Processed Amount = N/A) by selecting the associated **Delete** link. The Request displays in the **Deleted Discretionary Requests** table (select the **View Deleted Requests** link). The **Download PDF** link creates an Adobe PDF version of the request for saving and/or printing.

The Status for a request can be: In Progress, Submitted, Sent Back, or Processed. Sent Back indicates DCED requires additional information or has fully denied the request.

Discretionary Requests				
Discretionary Requests				
	Name	Status	Request Amount	Processed Amount
View Edit Delete Download PDF	Community Action CSBG Request	Sent Back	\$7250	N/A
View Edit Delete Download PDF	CSO Test	Sent Back	\$100000	N/A
Insert New Discretionary Request			View Deleted Requests	

Figure 17.12 – Discretionary Requests Table

After submitting the Discretionary Request to DCED for review, the request will be processed or be returned along with a comment for the reason it cannot be processed. If processed, the Processed Amount displays (instead of N/A) (**Figure 17.13**). An e-mail notification and an alert are sent to the agency ED, Local Admins, and Users with Work Plan access. If the request is processed, the request shows the Processed Amount entered by DCED.

Discretionary Requests				
Discretionary Requests				
	Name	Status	Request Amount	Processed Amount
View Download PDF	Discretionary Food Request	Processed	\$65098	\$65098
View Download PDF	School Supply Request	Processed	\$10000	\$10000
View Download PDF	New Office Computers	Submitted	\$12200	N/A
Insert New Discretionary Request			View Deleted Requests	

Figure 17.13 – Discretionary Requests Table

Alerts: Deleting or re-submitting a request to DCED automatically marks the alert as Worked for everyone receiving the alert. Selecting to Hide an alert, only hides it for the user hiding it.

Other Utilities

18. Download Reports

COPOS Report content can be downloaded in PDF format or e-mailed to the user by selecting the **Download Reports** link in the left navigation menu. The Download Report Content page will change depending on the selected report year, account type, and access permissions. The size of the report font is able to be changed from Normal to Large or Extra Large (**Figure 18.1 – 1**). Select a blue bar or down arrow to expand the category to display all related reports (**Figures 18.1 and 18.2**).

If the Report year is changed, (**Change** link at the top of the left navigation menu), the reporting information will be for the selected year. **Note:** **Agency Highlights**, the **Organizational Standards Reports Figure 18.1 – 4**) and **Board Reports (Figure 18.1 - 5)** display the information as of the current date.- versus data for a specific Report year.

Note: The Full and Blank Complete Agency Questionnaire Report sections are available to all users. The Full and Blank Work Plan, and CAP and Budget Work Plan Sections are available to the agency Executive Director, Local Admins, and Users with Work Plan access.

Each report has a **title (Figure 18.2 - 1)** and a brief description. Most Annual Report sections have options to print a Full or Blank report, Help information, or Year-to-Year report (**Figures 18.2 and 18.3**).

Download Report Content	
1 →	Report Font Size <input type="text" value="Normal"/> Aa
2 →	Agency Questionnaire Report
	Work Plan Reports
	Annual Report - Complete and Part Reports
	Agency Highlights
	Module 2
3 →	Module 3
	Module 4: A (Quarterly)
	Module 4: B
	Module 4: C
4 →	Organizational Standards Reports
5 →	Board Reports

Figure 18.1 - Download Report Content

Select the envelope icon to have an e-mail sent with the report as an attachment. Select the down arrow to generate and view the associated report. A loading symbol may appear while the report is being generated - give the report time to complete before navigating from the page.

Annual Report - Complete and Part Reports		^
Complete Report		
<i>The complete Annual Report.</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank <input type="radio"/> Help <input type="radio"/> Year-to-Year		
Agency Highlights		
<i>Agency Highlights Report.</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank		
Module 2		
<i>Module 2 Expenditures, Capacity, & Resource Report.</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank		
Module 3		
<i>Module 3 Report.</i>		
<input checked="" type="radio"/> Full		
Module 4: A (Quarterly)		
<i>Module 4A Individual & Family Performance Indicators (Quarterly) Report.</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank		
Module 4: B		
<i>Module 4B Individuals & Families Served Report.</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank		
Module 4: C		
<i>Module 4C Characteristics of Those Served Report.</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank		

Figure 18.2 - Report Group Expanded View

Module 2		^
Section A: A.2.		
<i>A.2. CSBG Expenditures Domains</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank <input type="radio"/> Help <input type="radio"/> Year-to-Year		
Section A: A.4.1.		
<i>A.4.1 Agency Capacity Building Activities Funded by CSBG</i>		
<input checked="" type="radio"/> Full <input type="radio"/> Blank <input type="radio"/> Help <input type="radio"/> Year-to-Year		

Figure 18.3 - Report Group with Full, Blank, Help, and Year-to-Year Options

Download Report Content

Agency: DCED Admins Select

Report Font Size Normal Aa

Administrator Reports	▼
Agency Questionnaire Report	▼
Work Plan Reports	▼
Annual Report - Complete and Part Reports	▼
Agency Highlights	▼
Module 2	▼
Module 3	▼
Module 4: A (Quarterly)	▼
Module 4: B	▼
Module 4: C	▼
Organizational Standards Reports	▼
Board Reports	▼

Figure 18.4 – DCED System Admin Down Load Report Content Options

Reports available from the Download Report Content page include:

COPOS 2018 and Newer Annual Reports

- **Complete Report:** Displays all Modules and Sections associated with the selected Report year.
- **Part Reports:** Displays the selected Module, Part or Goal.
- **Reports by Section:** Displays the selected Section.

Agency Highlights and Annual Report Options

- **Full:** The selected report with your agency's numbers (if reported).
- **Blank:** A blank version of the selected report.
- **Help:** Displays the available help for the selected Section.
- **Year-to-Year:** Displays the Year-to-Year Variance for the selected section. Year-to-Year Variance displays the difference in numbers entered between the previous and current reporting years.

Organizational Standards Reports

- Organizational Standards Compliance Status (included in an automatic monthly e-mail)
- Organizational Standards Compliance Status with Links to Documentation
- Summary of Un-Met Standards
- Standards Requiring Board Attention

Board Reports

- Board Member Listing
- Sign In Sheet

19. Automated Functions

General

COPOS contains several scheduled automated functions that run at 8:00 a.m. on designated days. These automated functions are used to improve system security and provide information to COPOS users. An overview of each is described in the following sections.

Report Notifications

To ensure the Annual Report is submitted on time, the following notifications are used:

1. Lock notification warning
 - a. Notifies the Agencies when a quarter lock date is approaching.
 - b. Sends an email when 30, 20, 10, 5, and 1 day(s) are remaining in the quarter.
2. Overdue Report notification
 - a. If an Agency fails to submit their Report on time, COPOS sends a reminder email.
 - b. States how many days the report is overdue.
 - c. Sends emails daily until the report is submitted by the Agency.

Agency Questionnaire Notifications

The agency Executive Director, Local Admins, and Users with Work Plan access receive a dashboard alert and an e-mail notification when DCED returns the questionnaire to the agency. When an agency questionnaire is submitted to DCED, the agency's DCED Program Specialist and System Admins receive a dashboard alert.

My Alerts					
My Active Alerts My Hidden Alerts My Worked Alerts					
My Active Alerts					
Alert	Description	Created Date	Worked	Hide	
COPOS 2022 Send Back - Agency Questionnaire	Please Review	1/24/2022	X	X	

Figure 19.1 – Agency Submits Work Plan - DCED Returns - Agency Alert

Work Plan Notifications

The agency Executive Director, Local Admins, and Users with Work Plan access receive a dashboard alert and an e-mail notification when DCED returns the Work Plan to the agency. When an agency Work Plan is submitted to DCED, the agency's DCED Program Specialist and System Admins receive a dashboard alert.

All Active Alerts					
Agency	Alert	Description	Created Date	Worked	Hide
Carbon Co.	Work Plan	Submitted for Review	9/22/2021	X	X
CAPMC	Work Plan	Submitted for Review	9/17/2021	X	X

Figure 19.2 – Agency Submits Work Plan - DCED System Admin Alert

If DCED sends the Work Plan back to the agency for updates, the same users receive a dashboard alert and an e-mail notification.

My Alerts				
My Active Alerts My Hidden Alerts My Worked Alerts				
My Active Alerts				
Alert	Description	Created Date	Worked	Hide
Work Plan Returned	Corrections Needed	9/21/2021	X	X

Figure 19.3 – DCED Processes Agency Work Plan - Agency Alert

Send Back Notifications

The agency Executive Director, Local Admins, and Users with Work Plan access receive a dashboard alert and a Send Back Begun e-mail notification when DCED has selected one or more items for a Send Back. When the agency submits the Send Back to DCED, the agency's DCED Program Specialist and System Admins receive a dashboard alert and a Send Back Returned e-mail notification.

My Alerts				
My Active Alerts My Hidden Alerts My Worked Alerts				
My Active Alerts				
Alert	Description	Created Date	Worked	Hide
2021 Send Back Override	Review Needed	9/22/2021	X	X

Figure 19.4 – DCED Send Back (Override) - Agency Alert

If DCED denies (sends back) the information, the agency users receive a dashboard alert and a Send Back Denied e-mail notification. If DCED denies the information again, agency users receive a dashboard alert. When DCED approves the agency's Send Back information, the agency users receive an e-mail notification.

Discretionary Funding Request Notifications

The agency Executive Director, Local Admins, and Users with Work Plan access receive a dashboard alert and an e-mail notification when DCED returns a discretionary request to the agency. When an agency discretionary request is submitted to DCED, the agency's DCED Program Specialist and System Admins receive a dashboard alert.

My Alerts				
My Active Alerts My Hidden Alerts My Worked Alerts				
My Active Alerts				
Alert	Description	Created Date	Worked	Hide
COPOS 2022 Send Back - Discretionary	COVID Project	1/24/2022	X	X

Monthly Update E-mail

On the first of the month, COPOS sends an e-mail to each agency summarizing the following items:

1. Organizational Standards status
 - a. Point in time summary attached as a PDF document
 - b. Identifies Standards that will become or are non-compliant.
2. Board Member status
 - a. Lists board members whose terms have expired and ending within 90 days.