

COPOS November Release Notes

Contents

New Features	2
1) Module 3 Copy Over	2
2) Streamlined generating complete report for Standard 9.4	3
3) Added “Character Counts” for narratives.....	3
4) New Executive Director Alerts panel on Home page.....	3
5) New “COPOS Agency Monthly Update” e-mail	4
6) Manage Initiatives page now auto-saves.....	4
Changes.....	5
1) Updated initiative validation text	5
2) “Report Status” Page	5
3) Agency Highlights character limits changed	6
4) Agency Highlights “Domains” question changed from narrative to checkboxes	7
5) ED Popup Error Text.....	7
6) Updated questions to use Annual Report Renumbering.....	8
7) Added a third Other indicator to each Domain	9
8) Board “Sign in Sheet” now lists “Others in Attendance”	9
Bug Fixes	9
1) Organizational Standards Documentation “Other” checkbox.....	9
2) Duplicate emails no longer sent when account reactivated.....	10
3) User accounts unable to access Module 3.....	10
REMINDER.....	10
1) Security Agreement	10

New Features

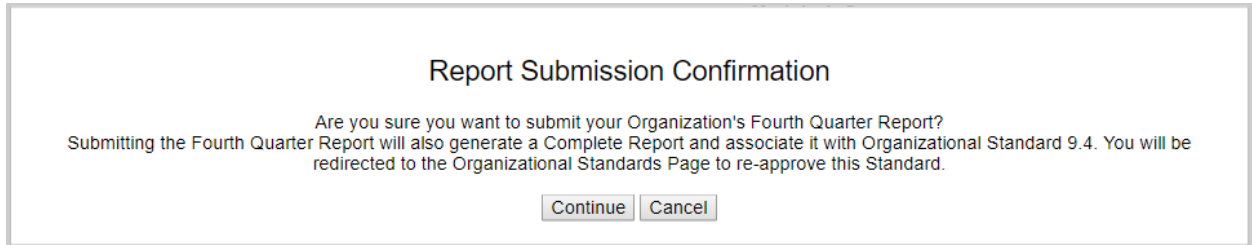
- 1) **Module 3 Copy Over** – A new process has been created to copy all **Active** initiatives (Status is “Initiative Active”) to the next program year. This will ensure appropriate outcomes are set annually and ensure that agencies do not have to manually enter their initiative in a subsequent year. The Copy Over Process will copy Module 3 A questions 1 – 11 from 2018 over to 2019. The remaining questions from Module 3 A will require annual input. The Module 3 Copy Over Process will copy all initiatives which remain active as of **January 11, 2019** after Close of Business (5:00 PM EST). This means that any changes made by the agency to an initiative after 1/11/2019 in Module 3A **MUST Also Be Updated** in 2019 Module 3A by the agency for this initiative.

Note: This process will be discussed on the webinar November 15 at 2:00 PM. Please submit your questions ahead of time and be sure to listen in.

Important Things to Remember:

- **Prior to 1/11/19** - All agencies must ensure accuracy of Module 3A Information based on an “as of date of 12/31/2018” (reporting period end date). You are being granted the extra time from 12/31/18 – 1/11/19 before the Copy Over occurs to **ensure data accuracy**.
- Reminder e-mails will be generated – do not disregard. Any updates made after 1/11/19 in 2018 Module 3 A will need to be updated in 2019 **Manually**. Update now - Do not delay your updates!
- **Initiatives will not be available (for view or update) in 2019 until the Copy Over occurs.** The 1/11/19 date was set to ensure accuracy while allowing agencies to make changes in 2019 as early as feasible.
- **2019 Initiative Outcomes and Targets are due 2/14/19** – After the Copy Over occurs, appropriate updates must be made in 2019 Program Year to ALL Initiatives. Please review all initiatives in 2019 to ensure outcomes and targets are set in Module 3 A & B. Also, be sure to add any new initiatives you will be working on in 2019 to the 2019 report year. Note: Throughout 2019, we will continue to allow you to make reporting year changes and add new initiatives.
- **Please refer to the “Module 3 Copy Over Information” document** for specific details on what data is copied and may be updated.
- Reporting Timeline
 - **1/11/2019** – Final day to change Module 3 A data in 2018
 - **1/15/2019** – Begin Updating Module 3 A for 2019
 - **2/14/2019** All of the following report data is due
 - Submit 2018 full Annual Report
 - ED’s sign Organizational Standard 9.4
 - Update 2019 Targets for Module 3 and Module 4A
 - **Throughout 2019** – Remember to add initiatives to Module 3 and track your progress on existing initiatives. You may update your Module 3 B Targets throughout the year. Also remember to track your progress on other Targets and notify your program monitor if targeting changes are required.

- 2) Streamlined generating complete report for Standard 9.4 – When an ED signs the Annual Report, they will receive a confirmation page asking them to confirm that they are ready to submit their report. This confirmation page advises them that their report will also be generated to Organizational Standard 9.4 automatically. It also advises them that they will be redirected to the Organizational Standards page to reapprove and sign the standard.

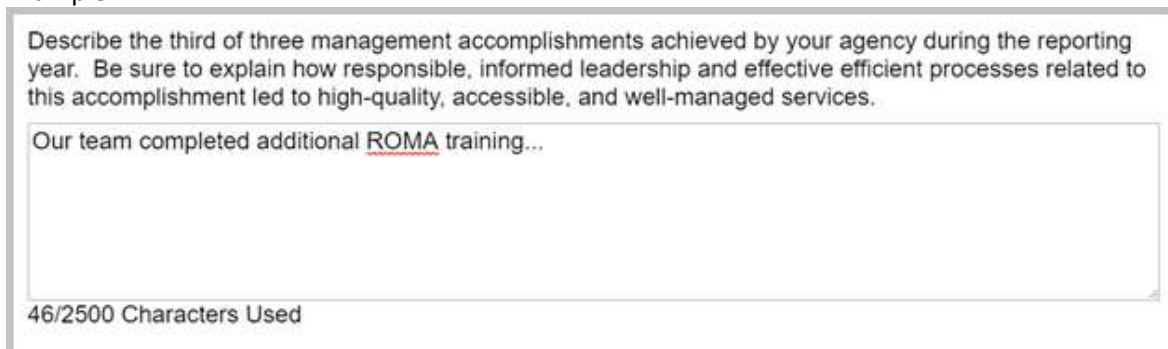


A screenshot of a web-based confirmation dialog box titled "Report Submission Confirmation". The text inside asks, "Are you sure you want to submit your Organization's Fourth Quarter Report?" and provides additional information: "Submitting the Fourth Quarter Report will also generate a Complete Report and associate it with Organizational Standard 9.4. You will be redirected to the Organizational Standards Page to re-approve this Standard." At the bottom, there are two buttons: "Continue" and "Cancel".

Once the ED clicks on the “Continue” button, the system will generate the report and attach it to standard 9.4. This may take a couple of seconds and then the ED will be taken directly to the Organizational Standards page with standard 9.4 open. At this point, the ED is required to “Approve” the standard. From a programmatic perspective the ED must manually approve the standard; however, the process is now just a click of a button from being completed.

- 3) Added “Character Counts” for narratives – In Agency Highlights each question will now have a character count below it, so individuals will know how many additional characters may be added.

Example:



A screenshot of a text input field within a form. Above the field is a prompt: "Describe the third of three management accomplishments achieved by your agency during the reporting year. Be sure to explain how responsible, informed leadership and effective efficient processes related to this accomplishment led to high-quality, accessible, and well-managed services." The text "Our team completed additional ROMA training..." is entered into the field. Below the field, a character count is displayed: "46/2500 Characters Used".


- 4) New Executive Director Alerts panel on Home page – New User Alerts box will display to Executive Director’s on their Home page. It will display Organizational Info alert if the ED needs to sign the Organization’s Board and Key Staff changes. Directly underneath this alert, the Organizational Standards alert shows an OS which require attention. All Standards which are not met will be listed in numerical order, followed by a listing of all Standards which require ED Approval. Note: COPOS Local Administrators and Users will continue to have access to the Password Expiration Alert.

User Alerts
Organizational Info Needs Attention Your Organization's Board and Key staff Information requires approval. Please approve this data using the Edit Organization Page .
Organizational Standards Need Attention The following Standards are not met: 5.4. The following Standards require approval: 7.4. Please see the OS Report Page .
Password Expiration

- 5) New “COPOS Agency Monthly Update” e-mail (replaces Monthly OS Report email) – The Monthly OS Report e-mail has a new addition and a new name. The e-mail text will now show any board members whose term will be expiring in the next 90 days (or previously expired). The OS monthly report will continue as an attachment.

COPOS Agency Monthly Summary

Agency Name Here - Organizational Standards Compliance Status-5488.pdf (34 KB)



Agency Name Here,

Please review the COPOS Monthly Summary information below.

Organizational Standards
 An Organizational Standards Summary Report is attached for your review. This Report may be downloaded at any time from the "Download Report Content" Page in COPOS.

Board Information
 The following Board Members are past the end of their term:
 Amy Smith: (11/6/2018)

The following Board Members are nearing the end of their term:
 John Sanders: (12/15/2018)
 Julie Snyder: (2/15/2019)

Please ensure your Agency's board information is up to date in COPOS.

This is an automated message from the COPOS System
 COPOS was developed and is maintained by Community Action, Inc. under contract with the Pennsylvania Department of Community and Economic Development. Community Action, Inc. is located in Pottsville, PA.

- 6) Manage Initiatives page now auto-saves – When entering data within Module 3, the Initiative screen will auto-save your changes each time you leave a textbox (whether you go to the next textbox or another screen). If you are suddenly called away or involved in an intense conversation about question 5 and you have previously entered data for question 1 – 4, the data entered in questions 1 – 4 will be saved even if you are subsequently timed out. This is consistent with other screens in COPOS.

Changes

- 1) **Updated initiative validation text** – When saving an Initiative with errors on the screen, the new error message below will be displayed. This message allows the Auto-save process to Save incomplete data and for users to save their initiative prior to completion. You will need to review the Initiative and correct any red errors prior to being able to report on this Initiative (Module 3 B). All errors must be corrected prior to Submitting the Annual Report.

Save Last saved by Melanie Sheeler on 10/29/2018 4:13:49 PM. **Initiative details are not validated, please ensure all red errors have been addressed, then click the 'Save' button to validate the initiative details.**

- 2) **“Report Status” Page (New & Improved “Complete/Incomplete Sections”)** – Previously, the “Complete/Incomplete Section” report was only available during the 4th quarter submission. This report will be accessible for each quarterly report. The Report Status page has been updated to show the “new” full Annual Report sections with the addition of Agency Highlights and Board & Key Staff Approval. The “Report Status” is available as a link from the Main Menu bar in COPOS (shown in left picture) or from the Home page (shown at right):

The screenshot displays the COPOS system interface. On the left is a dark blue sidebar menu with the following links: Home, Announcements, Download Report Content, **Report Status** (highlighted with a red box), Expand All, + Admin, + Organizational Standards, and + Agency Highlights. The main content area is titled 'Welcome to COPOS'. Below the title is a table titled 'Quarterly Report Submission Status'.

Target Report	First Quarter	Second Quarter	Third Quarter	Fourth Quarter
2/14/2019	4/30/2019	7/31/2019	10/31/2019	2/14/2020

Below the table, a message states: 'All Quarterly Reports are Due on the Submission Date listed above. The System will lock at 11:59 p.m. on the date provided.' Below this message are three links: **Report Status** (highlighted with a red box), Section Modification Dates, and Override Status. At the bottom of the main content area are two buttons: 'Edit Personal Information' and 'User Alerts'.

Once selected, the “Report Status” page will appear as follows:

Agency Highlights	
Delivering Services	Complete
Mobilizing Resources	Complete
Analytic Approaches	Complete
Module 2	
Section A: A.2	Complete
Section A: A.4	Complete
Section B	Complete
Section C	Complete
Module 3	
Example 1 Module 3: A Details	Complete
Example 1 Module 3: B Report	Incomplete
Example 2 Module 3: A Details	Complete
Example 2 Module 3: B Report	N/A
Module 4: A (Quarterly)	
FNPI 1 - Employment	Complete
FNPI 2 - Education/Cognitive Development	Incomplete
FNPI 3 - Income/Asset Building	Complete
FNPI 4 - Housing	Complete
FNPI 5 - Health and Social	Complete

Please Note: If no Outcomes have been selected for an Initiative in Module 3, the status will appear as N/A because there are no Outcomes (Module 3 B) selected to report on this Initiative during this reporting period.

Note: By clicking on any hyperlink, the user will be taken directly to that section of the Annual Report to complete it and can then return to the Report Status screen.

- 3) [Agency Highlights character limits changed](#) – The second question under Agency Highlights: Mobilizing Resources has been updated to restrict character count to 100. All other text boxes will maintain a 2500-character count limit at this time.

Investment, program, service, or activity name (no acronyms, please)?
0/100 Characters Used

- 4) Agency Highlights “Domains” question changed from narrative to checkboxes – Agency Highlights: Mobilizing Resources third question asks the agency to provide the “CSBG domains affected or impacted.” This has been updated from a textbox to a list of domains where a check will be placed in front of each domain which is impacted.

CSBG domains affected or impacted?

- ☐ Employment
- ☐ Education and Cognitive Development
- ☐ Income, Infrastructure, and Asset Building
- ☐ Health and Social/Behavioral Development
- ☐ Civic Engagement and Community Involvement
- ☐ Housing

- 5) ED Popup Error Text – When attempting to submit a quarterly or full Annual Report where errors exist, a popup listing the errors is displayed. This popup screen was modified to match the new Annual Report Numbering.

Your Report has NOT been submitted.

The following Sections need validated and saved:

Module 4: A (Quarterly) : FNPI 2 - Education/Cognitive Development

The following Initiatives do not have a valid Module 3: B Report:

Initiative Name Here

Close

- 6) Updated questions to use Annual Report Renumbering - The Annual Report was renumbered in COPOS to match the most recent numbering provided by NASCSP. This includes the latest CNPI (Module 3 (A & B)), FNPI (Module 4 A), and SRV (Module 4 B) numbering.

Menu Example:

- Module 3: B
 - [Create M3 CNPI](#)
- Module 4: A (Quarterly)
 - [FNPI 1 - Employment](#)
 - [FNPI 2 - Education/Cognitive Development](#)
 - [FNPI 3 - Income/Asset Building](#)
 - [FNPI 4 - Housing](#)
 - [FNPI 5 - Health and Social](#)
 - [FNPI 6 - Civic Engagement](#)
 - [FNPI 7 - Multiple Domains](#)
- Module 4: B
 - [SRV 1 - Employment](#)
 - [SRV 2 - Education/Cognitive Development](#)
 - [SRV 3 - Income/Asset Building](#)
 - [SRV 4 - Housing](#)
 - [SRV 5 - Health and Social](#)
 - [SRV 6 - Civic Engagement](#)
 - [SRV 7 - Multiple Domains](#)
- Module 4: C
 - [General](#)
 - [1. Gender](#)

3A Example

Employment Indicators
<input checked="" type="checkbox"/> CNPI 1a. Number of jobs created to increase opportunities for people with low incomes in the identified community.
<input type="checkbox"/> CNPI 1b. Number of job opportunities maintained in the identified community.
<input type="checkbox"/> CNPI 1c. Number of "living wage" jobs created in the identified community*.
<input type="checkbox"/> CNPI 1d. Number of "living wage" jobs maintained in the identified community*.
<input type="checkbox"/> CNPI 1e. Number of jobs created in the identified community with a benefit package.
<input type="checkbox"/> CNPI 1f. Percent decrease of the unemployment rate.
<input type="checkbox"/> CNPI 1g. Percent decrease of the youth unemployment rate.
<input type="checkbox"/> CNPI 1h. Percent decrease of the underemployment rate.
<input type="checkbox"/> Other

3B Example

Employment Indicators

Counts of Change for Employment Indicators	Identified Community	Target	Actual Results	Performance Target Accuracy (%)
CNPI 1a. Number of jobs created to increase opportunities for people with low incomes in the identified community Notes	County			%

- 7) Added a third Other indicator to each Domain – In Module 3 questions #6 and #14, the “Other” Domain has been numbered to allow for up to 3 “Other” Domains (3 Counts of Change & 3 Rates of Change) for each CNPI (CNPI1 through CNPI 8). This additional detail and numbering will display once the “Other” category box is selected.

The screenshot shows a form titled "Emergency Management Indicators" with a dark blue header. Below the header, there is a section with a checkbox labeled "Other" which is checked. Underneath, there are two groups of input fields. The first group is labeled "Counts of change:" and contains three text boxes labeled "CNPI 8z.1.", "CNPI 8z.2.", and "CNPI 8z.3.". The second group is labeled "Rates of change:" and contains three text boxes labeled "CNPI 8z.4.", "CNPI 8z.5.", and "CNPI 8z.6.". All text boxes are currently empty.

- 8) Board “Sign in Sheet” now lists “Others in Attendance” – The board “Sign in Sheet” found under Download Report Content: Board Reports now provides a sheet for Others in Attendance to sign in at board meetings.

Bug Fixes

- 1) Organizational Standards Documentation “Other” checkbox – When selecting “Other” as the type of documentation which will support that this standard is Met, the system will require “other text” be entered in the text box. Previously this was a “suggested” field.

The screenshot shows a form for "Standard 1.1 - The organization demonstrates low-income individuals' participation in its activities." At the top, there are fields for "Met:" (a dropdown menu with "Yes" selected), "Date of Compliance:" (a text box with "01/01/2018"), and "Executive Director Approval:" (a text box). To the right of these fields are "Approve" and "Help" buttons. Below this is a section titled "Documentation" with a list of checkboxes: "Advisory Group Documents", "Advisory Group Minutes", "Activity Participation Lists", "Board Minutes / Committee Minutes" (checked), "Board / Advisory Body Pre-Meeting Materials / Packet", "Volunteer Lists / Documents" (checked), and "Other" (checked). Below the "Other" checkbox is a text box for "Other text". At the bottom left of the form, there is a red asterisk and the word "required". To the right of the "Documentation" section is a vertical line separating it from a "Notes" section.

- 2) [Duplicate emails no longer sent when account reactivated](#) – Prior to this release, when a COPOS account was reactivated, the user received two e-mails. Now only one e-mail is generated from COPOS to the user when an account is reactivated.
- 3) [User accounts unable to access Module 3](#) – With this promotion User accounts who have been granted access to Module 3 can see and make changes to Initiatives. Prior to this release only “Local Administrator’s” and “Executive Director’s” could access Module 3.

REMINDER

- 1) [Security Agreement](#) – The first time you sign into COPOS in 2019, you will be required to sign a new security agreement.