



Admin Tips

User Manual

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Overview

Admin Tips:

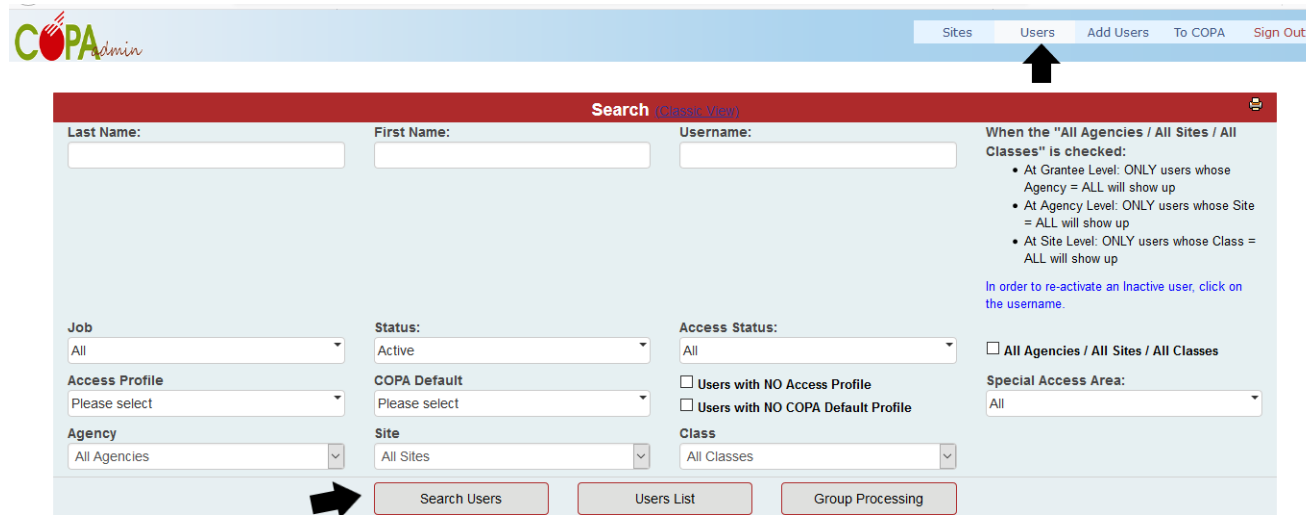
- Add & Un-block User Profiles
- Deactivate User Profiles
- Manage Volunteer Profiles
- Define Start & End Dates and Assign Teaching Staff
- Start Family Services (batch process and individually)
- Assign Family Advocates (batch process and individually)

Add & Un-block User Profiles

To view a list of users please go to the Admin page and select **Users** > **Search Users**.

Here Admin will see “active” and “inactive” user profiles and may realize new staff don’t have a profile set up.

Adding a User Profile can be done by both Admin and SuperAdmin.



The screenshot displays the COPA Admin interface. At the top, a navigation bar includes links for 'Sites', 'Users', 'Add Users', 'To COPA', and 'Sign Out'. An arrow points to the 'Users' link. Below this is the 'Search (Click View)' form. The form contains several input fields and dropdown menus for searching users:

- Last Name:** Text input field
- First Name:** Text input field
- Username:** Text input field
- Job:** Dropdown menu (set to 'All')
- Access Profile:** Dropdown menu (set to 'Please select')
- Agency:** Dropdown menu (set to 'All Agencies')
- Status:** Dropdown menu (set to 'Active')
- COPA Default:** Dropdown menu (set to 'Please select')
- Site:** Dropdown menu (set to 'All Sites')
- Access Status:** Dropdown menu (set to 'All')
- Class:** Dropdown menu (set to 'All Classes')

Additional options and instructions are provided on the right side of the form:

- When the "All Agencies / All Sites / All Classes" is checked:**
 - At Grantee Level: ONLY users whose Agency = ALL will show up
 - At Agency Level: ONLY users whose Site = ALL will show up
 - At Site Level: ONLY users whose Class = ALL will show up
- In order to re-activate an Inactive user, click on the username.**
- ☐ **All Agencies / All Sites / All Classes**
- Special Access Area:** Dropdown menu (set to 'All')

At the bottom of the form, there are three buttons: 'Search Users', 'Users List', and 'Group Processing'. An arrow points to the 'Search Users' button.

Add & Un-block User Profiles

Adding New User Profiles:

To add a new user, go to ADMIN > ADD USERS and enter the mandatory fields.

- **User Name** (User Name must be 6 to 16 characters)
- **Password** (Password is case sensitive and must be 6 to 16 characters, consist of at least one Capital Letter and a Number).
- The drop-down List “**User is the same as following staff**” pulls in from the HR Staff Profiles.
- In the **User Access Privileges** section, select the location(s) where this user should have access.
- Select the **Job/Role** to determine functionality, or what user can do with the records within her/his access level.

Add & Un-block User Profiles

UN-Blocking BLOCKED USERS:

To UN-Block an existing user please go to Admin > Users > Search User.

Once you locate the user, in the right-hand side of the page locate **Access Status** > Click on the link **“BLOCK”** until it shows **“Un-Blocked”**.

Their status should say UN-Blocked while they try to log in after being Blocked, either manually or due to inactivity.

The status should not say **“Normal”** if they were recently blocked, either manually or due to inactivity.

Sites				
Users				
Add Users				
To COI				
No				
ntory cess	eDocs Access	File Sharing Usage	Access Status	Acc Pro
es	Yes	0	Normal	
do	Yes	0	Normal	
es	Yes	0	Un- Blocked	



Deactivate User Profiles

Making User Profiles Inactive:

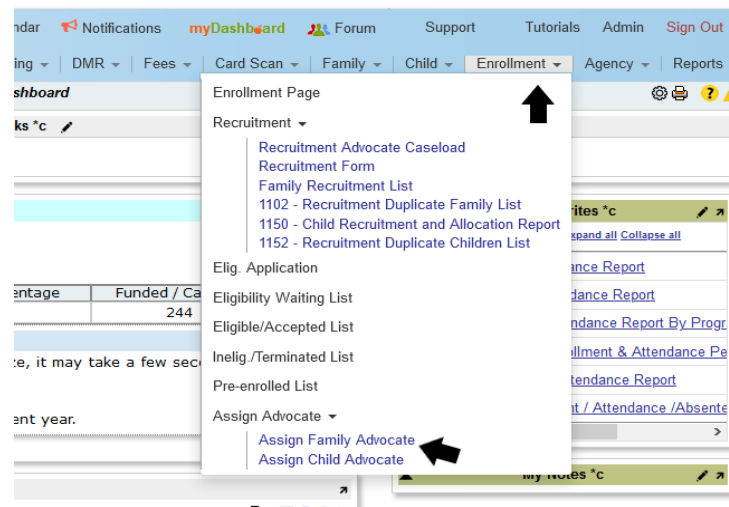
While Admin can Block and Un-Block users under Access Status, you may wish to make a user profile permanently Inactive if they are no longer employed by the Agency.

To do this, (1) locate their username through Admin > Users > Search Users, (3) click on their username, click (3) “Remove User.”

The screenshot shows the COPA Admin web interface. The browser address bar displays the URL: https://training.mycopa.com/admin/admin_page.epl?portalNew=1&noHeading=1. The interface has a blue header with the COPA Admin logo and navigation links: Sites, Users, Add Users, To COPA, and Sign Out. Below the header, there are three main sections: 'Username & Password', 'User Information', and 'User Access Privileges'. The 'Username & Password' section contains fields for Username (Beatriz) and Password (*****), with instructions: 'Username must be 6 to 32 characters.' and 'Password is case sensitive and must be 6 to 16 characters, consist of at least one capital letter, a number. Example: Mypass@23'. The 'User Information' section contains fields for First Name (Beatriz), Last Name (Kelly), Gender (Female), Title (Data Systems Analyst), Phone, Email (bkelly@mvfs.org), Address, City, State (New York), Zip Code, and Mobile Phone. A 'Remove User' link is located at the bottom left of the 'User Information' section, with a large black arrow pointing to it. The 'User Access Privileges' section is partially visible at the bottom.

Deactivate User Profiles

- There are two reasons the system may NOT allow an Admin to make a user inactive.
- Reason One: They are an Advocate with a caseload that should be removed first. If this is the case, please go to **Enrollment > Assign Family Advocate** to remove Active and Archived families from their caseload.



Deactivate User Profiles

Remove Families from a Family Advocate caseload:

- 1.) Select the Name of the Advocate to see the families assigned to them.
- 2.) Under Family Type, choose **All Families**.
- 3.) Add a check box next to the Active or Archived Families on their caseload.
- 4.) Click “Remove / Transfer Caseload.”

Assigned Families To Hagan, Mary Ann (5 records found)

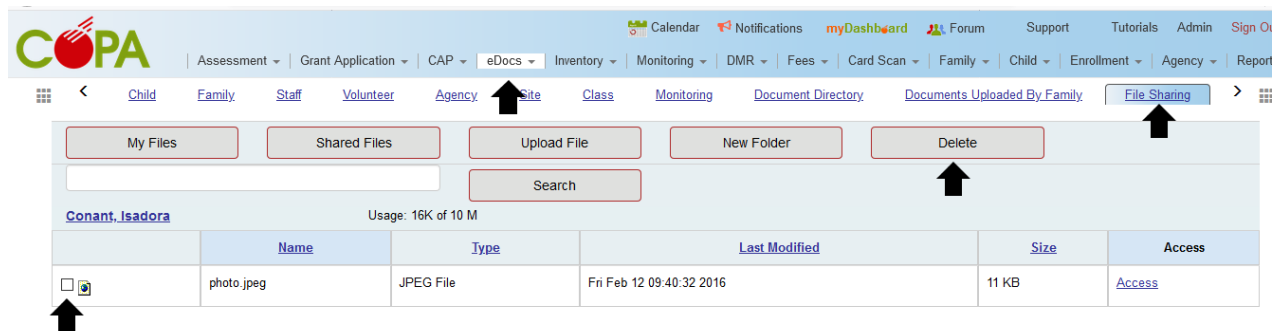
Family Type: All Families (dropdown menu)
Advocate Caseload: Remove Caseload (dropdown menu)
Remove / Transfer Caseload (button)

Family Enrolling Agency/Site	Family Status	Child Name	
Start/Bunbury	Archive	ALAN ABACA	Turabo H
<input type="checkbox"/> ALFARO, JAZMIN 200860 Turabo Hights/Eastview - EHS	Discontinue Services	DANIEL ALFARO MIGUEL ALFARO UNBORN ALFARO	Child Cri Child Car
<input type="checkbox"/> ARIAS, ANAYA 200917 Child Care Program for Early Education/THE DALLES	Receive Services	ALONDRA ARIAS UNBORN ARIAS UNBORN ARIAS	Child Cri

Deactivate User Profiles

Remove documents user has exclusive access to in their inbox.

- Reason Two: Staff could also have documents in DMR or eDocs > File Sharing that should be saved and deleted from the user's inbox.
- To find out if the user has documents please change their password and log in as the staff who left. Then go DMR > Inbox or **eDocs > File Sharing** and delete documents from their inbox. Note, Admin may want to save a document before deleting it.



Manage Volunteer Profiles

- To keep records current Admin also have access to **Volunteer Group Processing** where they “Mark Volunteers who need to be activated or Inactivated then submit the list.”
- If families need to be added as volunteers they can click “Add Volunteer” in the upper right hand corner of a Family Data Sheet.



Define Start & End Dates and Assign Teaching Staff



- Post-Rollover, at the start of the school year, Admin also define the Start and End Date so that children are not enrolled before the first day or after the last day of class.
- By submitting the parameters in **Update Class Start and End Dates** system inserts non-operational days that display on Attendance pages and reporting.

Define Start & End Dates and Assign Teaching Staff

If all start & end dates are the same for each class, Admin can enter dates at the top of the page and click “Apply All” to transfer them down to each classroom.

Note, without definition, the start and end will default to the Start and End of the Program Year.

Blank Class Start & End Dates will NOT update existing values. Teacher information WILL be updated according to selections.

Class Start Date:

Class End Date:

Apply to All Clear All

Agency: Ada S. McKinley Community Services Site: Children's Center (Halsted) Class: ALL Currently Enrolled= 0

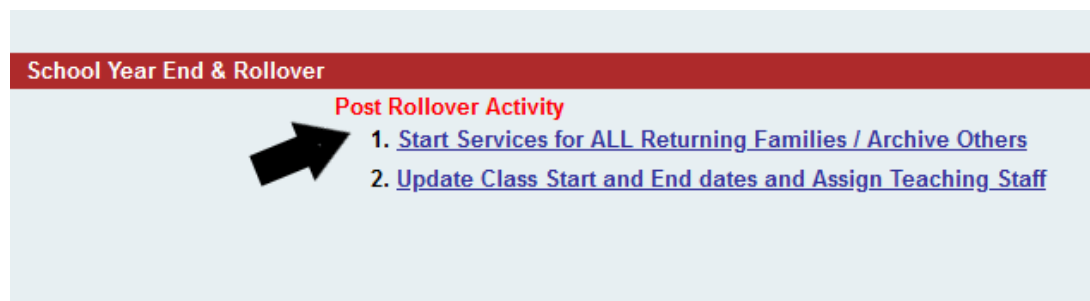
Universal Class Start/End Update									
Current School Year 2020-21		School Year From 09-08-2020 To 09-06-2021					Site Operation Start 09-08-2020	Site Operation End 09-06-2021	*Teacher *Assistant / 2nd Teacher *Assistant / 3rd Teacher
Class Name	Class Type	Size	Capacity	Option	Closed	Service Pre-school children	Class Start Date	Class End Date	Teachers
Baby Genius	Center based program-5 Days a week	8	8	Full	<input type="checkbox"/>	<input type="checkbox"/>	Current Value: 09-08-2020	Current Value: 09-06-2021	Garcia, Kairah Ash, Melisha Please Select an Assistant / 3rd Teacher
Blooming Butterflies	Center based program-5 Days a week	8	8	Full	<input type="checkbox"/>	<input type="checkbox"/>	Current Value:	Current Value:	Ramsey, Jaylyn Hayes, Sierra

Starting Family Services

Next, before enrolling children into your newly defined classrooms, an Admin user can go to **ADMIN > Post-RollOver Activity > Start Services for ALL Returning Families / Archive Others** and start services for families in a batch. Starting services for families at this stage ensures families are not overlooked.

The steps for starting services for families are as follows:

- 1.) Filter by Enrolling Agency & Site if your access provides you with multiple Sites.
- 2.) Filter for Not Receiving Services and Families with Eligible Children OR Families with Pre-enrolled Children.
- 3.) Choose a start date and “Apply All” if you wish to start families on a previous date.
- 4.) Click “Start Services” at the bottom.



Starting Family Services

If families are not started in a batch by Admin, they can be started individually.

All users (except for Teachers) can do this by going to **Family Data Sheet > Primary Caregiver Enrollment Information > Activity**

Make sure you change this to "Start Services".

Recruitment and Desired Services

Current Service Category: * Desired Services (expressed interest or identified need): Recruitment Activities:

PCG Comments:

Secondary Caregiver Information (None)

Fields marked with (*) are required for PIR report

Address & Agricultural Information History (Migrant Families)

Family's Eligibility & Income Information History

*Primary Caregiver Enrollment Information

Year	Enrolled	User Name	Enrolling Agency/Site	Pregnancy Status	Enrollment Status	Activity	Date
2019-20			Child Care Program for Early Education / THE DALLES			<input type="text" value="Not Selected"/>	

Age-Eligible Children of this Family

Name	ID	Birth Date	Age	Current / Last Location	Program Model	Status
last first	101030	11-07-2016	3y / 9m / 27d		EHS	waiting

New Child Application Unborn Application

Family Members List

Add Family Member

COMMUNITY AND CHURCH

What community do you live in? What church do they go to

Starting Family Services

When user Starts Services for family they choose an Agency, Site, Current Service Category, and Start Date.

Would you like to Start Services for this family?

Agency: Child Care Program for Early Education

Site: THE DALLES

Current Service Category: Early Childhood Services

Start Date: 09-04-2020

No Yes

Enter the date family first received Head Start services. This is generally, the first day of enrollment.

You have to click "Yes".

Starting Family Services

COPA | Calendar | Notifications | myDashboard | Forum | Support | Tutorials | Admin | Sign Out

Assessment - Grant Application - CAP - eDocs - Inventory - Monitoring - Fees - Card Scan - Family - Child - Enrollment - Agency - Reports

Marital Status: Uninsured: Medical Insurance: Insurance Name:

Family Advocate:

* Current Housing: * Current Housing Date: * Previous Housing: Living Situation:

Additional Information (UDF Fields):

Recruitment and Desired Services

Current Service Category: * Desired Services (expressed interest or identified need): Recruitment Activities:

PCG Comments:

Secondary Caregiver Information (None)

Address & Agricultural Information History (Migrant Families)

Family's Eligibility & Income Information History

*Primary Caregiver Enrollment Information

Year	Enrolled	User Name	Enrolling Agency/Site	Pregnancy Status	Enrollment Status	Activity	Date
2019-20	12-10-2019	Arias, Karla	Child Care Program for Early Education THE DALLES		Receive Services	Not Selected	

Age-Eligible Children of this Family

Family Members List

Add Family Member

COMMUNITY AND CHURCH

What community do you live in? What church do they go to

Assign Family Advocate

- Much like starting services for families, the Family Advocate can be assigned one at a time OR in a batch process.
- Assign a Family Advocate individually by going to the **Family Data Sheet > Primary Caregiver General Information > Family Advocate** to select from the drop-down.
- Only the Family Advocates who have access to where the family is Receiving Services will display.

Assign Family Advocate

While a Family can be assigned individually, adding, removing, transferring families and generally reviewing Advocate caseloads in a batch will save time.

The screenshot displays the COPA web application interface. At the top, there is a navigation bar with the COPA logo and various menu items including Calendar, Notifications, myDashboard, Forum, Support, Tutorials, Admin, and Sign Out. Below this, a secondary navigation bar contains tabs for Assessment, Grant Application, CAP, eDocs, Inventory, Monitoring, Fees, Card Scan, Family, Child, Enrollment, Agency, and Reports. The 'Enrollment' tab is currently selected. The main content area shows a table with columns for 'ALL / Grantee', 'Current Enrollment + Preg. Moms', and 'Enrollment'. A red box highlights the 'Enrollment' tab and the 'Assign Advocate' dropdown menu, which is open and shows options like 'Recruitment Advocate Caseload', 'Recruitment Form', 'Family Recruitment List', '1102 - Recruitment Duplicate Family List', '1150 - Child Recruitment and Allocation Report', '1152 - Recruitment Duplicate Children List', 'Elig. Application', 'Eligibility Waiting List', 'Eligible/Accepted List', 'Inelig./Terminated List', 'Pre-enrolled List', and 'Assign Advocate'. The 'Assign Advocate' option is circled in red. A red text box overlay on the screenshot reads: 'To assign Family Advocate, locate the Enrollment tab at the top of the screen. Next, "Assign Advocate".'

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Assign Family Advocate

At this point, the option to assign a Family and/or Child Advocate is provided. If you are completing “Family Partnership Agreements,” parents are assigned to Family Advocates so there is no need to “Assign Child Advocate.”

The screenshot shows the COPA web application interface. The top navigation bar includes links for Calendar, Notifications, myDashboard, Forum, Support, Tutorials, Admin, and Sign Out. The main header displays the user's name, 'Karl's Dashboard', and a 'My Quick Links' section. The left sidebar contains 'CHILD SEARCH' and 'Family Search' buttons. The main content area is titled 'Management By Information (MBI) Child Info *c' and features a table with enrollment data. Below the table, there are 'Expand all' and 'Collapse all' links. A dropdown menu is open, showing options for 'Enrollment Page' and 'Recruitment'. The 'Assign Advocate' dropdown is highlighted, showing 'Assign Family Advocate' and 'Assign Child Advocate' options. A red arrow points from the 'Yes' box to 'Assign Family Advocate', and another red arrow points from the 'No' box to 'Assign Child Advocate'.

ALL / Grantee	Current Enrollment + Preg. Moms	Enrollment Percentage	Funded / Capacity	Vacancy
	32	13.11%	244	212

Portlet Notes

- 1- Click on the portlet's header or the down arrow to expand the portlet. Depending on the data size, it may take a few seconds.
- 2- Click on the Arrow next to Agency or Site name to see sub-data.
- 3- Use drop down to see other MBI portlets.
- 4- Health screening Numbers are Calculated based on the Last Exam Date and is not limited to current year.

Management By Information (MBI) Family Info *c

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COPA

User: [User] | myDashboard | Home | Support | Logout | Admin | Reports

Assessment - | Grant Acquisition - | CAP - | eCOP - | Inventory - | Monitoring - | Fees - | Card Scan - | Family - | Child - | Enrollment - | Agency - | Report

Enrollment Page | Recruitment | Eligibility Analysis | Eligibility Waiver List | Eligible/Accessed List | Ineligible/Terminated List | Pre-enrolled List | Assign Advocate

Assigned Families To (0 records found)

Family Type: Active Families | Advocate Case/Lead: Remove Case/Lead | Remove / Transfer Case/Lead

Family Name	ID	Family Enrolling Agency/Site	Family Status	Child Name	Child's Enrolled Agency/Site/Class	Assign Date
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Filtering
Last Name: | First Name: | ID: |
Agency: ***Brooklyn Agency** | Site: Little Angels | Filter

Unassigned Families (30 records found)

Assign Date: 10-14-2018 | Action: Select an Advocate to Assign or View Existing Case/Lead | Assign Case/Lead

Family Name	ID	Family Enrolling Agency/Site	Child Name	Child's Enrolled Agency/Site/Class
<input type="checkbox"/> ARCHIBAL, NATE	201087	***Brooklyn Agency***Little Ang...	Nate Archibal	
<input type="checkbox"/> BALDWIN, ALEXANDER	201091	***Brooklyn Agency***Little Ang...	Gabriel Baldwin Leonardo Baldwin	
<input type="checkbox"/> BASS, CHUCK	201088	***Brooklyn Agency***Little Ang...	James Bass James Bass	
<input type="checkbox"/> BEAN, SAM	201010	***Brooklyn Agency***Little Ang...	KRYVIN BEAN	***Brooklyn Agency***Little Angels/Pink Hearts
<input type="checkbox"/> BELVAN, TINA	201090	***Brooklyn Agency***Little Ang...		
<input type="checkbox"/> BOB, LAURA	200972	***Brooklyn Agency***Little Ang...	SARA BOB	Turkey Heights/Enterprise - EHS/Classroom A I/EHS
<input type="checkbox"/> CASTRO, JULY	201062	***Brooklyn Agency***Little Ang...	XOCH Castro	***Brooklyn Agency***Little Angels/Pink Hearts
<input type="checkbox"/> COLLIN, EDWARD	201088	***Brooklyn Agency***Little Ang...	James COLLIN	
<input type="checkbox"/> DUKULSKY, JOHN	201010	***Brooklyn Agency***Little Ang...	KARL DUKULSKY	***Brooklyn Agency***Little Angels/Pink Hearts
<input type="checkbox"/> FLORES, FATIMA	200946	***Brooklyn Agency***Little Ang...	CRISTINA GILLES DEFEW/EMREW	Van Dyke/Nick/Van Dyke_Nick/Spring_Nick ***Brooklyn Agency***Little Angels/Pink Hearts

} Unassigned families will appear here.

Once you have check off the families you would like to add under a specific advocate, clicking assign will move the family file up.

Assign Family Advocate

- **Once the child leaves the program, you must go back and un-assign family and discontinue services for the family, so that other programs may be able to access the family file and assessment upon child enrollment.**

For additional assistance please call:

Your Support Services Coordinator in the area of Family Partnerships

Or, for COPA technical assistance, please contact:

Craig Zemke at Craig.Zemke@cityofchicago.org or
Jennifer Santana at Jennifer.Santana@cityofchicago.org