# COPA HR Module Guide

COPA HR Module

This document intends to serve as a quick reference support for entering preliminary data into COPA HR. This is not intended to be an all-inclusive list of data entry procedures and the examples provided do NOT include all program requirements, funding collaborations, job positions, or credential requirements. Rather, it provides initial support for adding staff to the data base. Due to many COPA updates under review, the guidance contained herein could change at any time.
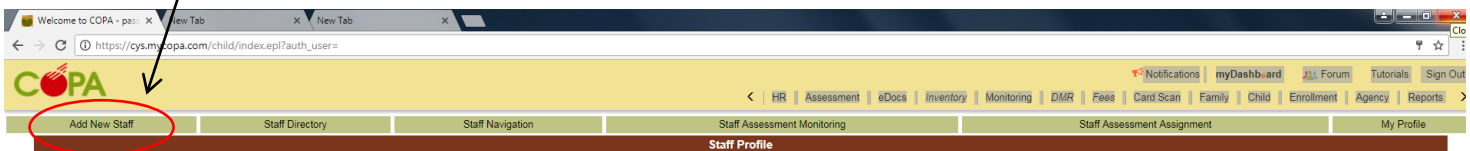
COPA PROCEDURES: HR Module

ACCESSING COPA HR

Tip - COPA HR access requires a separate user name & password

- **Log on with COPA HR user name & password – https://cys.mycopa.com**

- **Click HR tab displayed at top center of the page.**
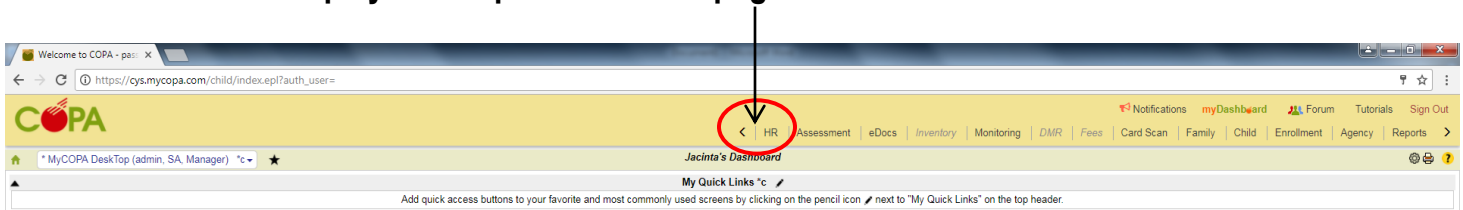
ADDING NEW STAFF

- **Click - Add New Staff on top left to access Staff Profile.**
  Tip – prepare background check & qualifications documents before adding staff.

Tip – Never add the same staff to COPA HR twice
- **Inactivated Staff can be Re-activated**
- **All COPA HR data for staff can be updated/edited**
- **If a new staff cannot be added to COPA HR and an Error Message is received, contact DFSS Data support**

ADDING NEW STAFF

All staff must be entered regardless of how their salary is paid. For teaching staff, it is essential that anyone who is in front of the class be entered into COPA, so that DFSS can monitor and ensure compliance with staffing requirements. **THIS INCLUDES TEMPORARY STAFF CONTRACTED WITH WHILE AN ORGANIZATION SEEKS TO HIRE A PERMANENT REPLACEMENT FOR A TEACHER WHO HAS LEFT**.

If there is truly no teacher for the classroom, the classroom should be closed and the children sent home for safety reasons. Programs must comply with child/teacher ratio requirements at all times. If there is a teacher in the classroom, they should have an HR file and be assigned to the classroom in COPA.

Personal Information –

➢ **Enter Name, Address, Email, Gender, & DOB**

- **No social security numbers should be added** until further measures are taken to ensure confidentiality.

- **Language:** use drop down menu to select primary language

  For Bilingual Staff: Identify Secondary Language: use drop down menu to select second language
   - If Proficient in second language - CHECK box for Proficient ✔
   - Must also ✔ "Proficient in more than one language other than English"

- **Ethnicity –** Determines whether a person is of Hispanic origin or not. Ethnicity is broken out in two categories, Hispanic or Latino and Not Hispanic or Latino. Hispanics may report as any race.
  --Source –US Census Bureau: https://www.census.gov/topics/population/race/about.html

- **Race**

  White – A person having origins in any of the original peoples of Europe, the Middle East, or North Africa
  Black or African American – A person having origins in any of the Black racial groups of Africa
  American Indian or Alaska Native – A person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment.
  Asian – A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam
  Native Hawaiian or Other Pacific Islander – A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
  --Source –US Census Bureau: https://www.census.gov/topics/population/race/about.html

Funding Source:

The Funding Source fields in COPA HR are now mandatory. These fields let us know the grant under which a teacher or other staff person is operating. All funding sources for a given classroom must be entered in the teacher file, even if the teacher isn't paid out of the grant. In the example below, the teacher is in a classroom which serves children under both the EHS and EHS-CCP grants, as well as Child Care through DFSS.

Even though the teacher receives no money from the EHS grant, it is entered here along with a salary percentage of "0." This is done so that the teacher will be included if we need to pull a list of all teachers in EHS funded classrooms, or pull other reports such as the EHS Program Information Report (PIR).

Please note that the sum of all Funding Source salary percentages MUST add up to 100% or COPA will not allow you to save or update a file. If some of an employee's compensate comes from a funding source not available in COPA, please add the balance under the funding source "Other."

It is important to enter all staff information completely and accurately. Please note that COPA calculates annual salary for all employees whose salary is not listed as "Yearly." A staff with a "Monthly" salary will have the number multiplied by 12 to get the yearly number. A "Bi-Weekly" salary will be multiplied by 26, and a "Semi-Monthly" salary will be multiplied by 24. If the full annual salary is entered on the Salary line and the salary is listed as "Bi-Weekly," reports will show the staff person with 26 times their actual salary!

Staff with no salary entered will still be included in agency averages as "0," which will make the numbers reported inaccurately low. For example, if one teacher has a salary entered as $30,000 a year, and another

teacher's salary is left blank, COPA will report an "average salary" of $15,000. For this reason, all teacher salaries MUST be entered in COPA, with no exceptions. **It does not matter if the teacher is permanent or contracted staff, the salary information is required.** We understand that many people are uncomfortable discussing money and compensation, but when you are working for an agency that accepts State or Federal funding, your salary information is not treated as confidential. Citizens' right to know how their tax money is being spent supersedes individuals' desire for privacy.

Employment Information: Click tab

- **Click 🖉 to edit or update**
- **Initial Hire Date** (date staff person was hired by organization)
- **Start Date** (date staff began working under grant. For HS or EHS, date must be AFTER initial background check date, NO EXCEPTIONS. For NEW sites must be on or after contract date).
- **Employment Type** refers to whether staff is an employee or contractor
- **See chart below for guidance on the following fields;** Position Classification, Employment Type

Guidance – Position, Classification, & Employment Type
Note - Chart below includes examples and is not inclusive of all positions

- All staff must be entered regardless of how salary is paid
- COPA POSITIONS will not necessarily match specific job titles for staff at your program
- Documentation of qualifications uploaded in eDocs
- Add date of next review

COPA Position use drop down menu & select;	COPA Classification use drop down menu to select;		Select COPA Employment Type
Teacher	**Infant & Toddler Child Development Staff** - works with ages 0-3		**Permanent Staff** for employee
	Child Development Staff – works with ages 3-5		**Contracted** for sub
Assistant Teacher	**Infant & Toddler Child Development Staff** - works with ages 0-3		**Permanent Staff** for employee
	Child Development Staff – works with ages 3-5		**Contracted** for sub
Teacher Aide	**Infant & Toddler Child Development Staff** - works with ages 0-3		**Permanent Staff**
	Child Development Staff – works with ages 3-5		
Site Director	**Administrative Staff**		**Permanent Staff**
Family Worker ☑ works directly w/ families	**Family & Comm. Part. Staff**		**Permanent Staff**
Family Child Care Teacher	**Infant & Toddler Child Development Staff**- staff works with ages 0-3 only		**Contracted**

☑ works directly w/ families **Family Child Care Teacher Assistant** ☑ works directly w/ families	**Child Development Staff**– staff works w/ ages **0-5**	**Contracted**
Home Based Visitor – ☑ works directly w/ families	**Infant & Toddler Child Development Staff**- works with ages 0-3 <u>only</u> **Child Development Staff**– works with ages 0-5	**Permanent Staff**

Salary & Salary Type:

Identify % of salary for each funding source: HS, EHS, Child Care, PFA-DFSS, PI-DFSS, etc

- **Add Annual Salary –** Salary must be entered **without commas**, in order to distinguish actual dollar amount.
- **Salary Type –** Use drop down menu
  Select **YEARLY** when entering annual salary.

- **If you are entering Hourly Rate (required for Teachers, Assistant Teachers and Home Visitors), YOU MUST also enter Hours/Week and Weeks/Yr.** (or the rate will be multiplied by zero for reporting purposes).
- **Please be aware that HS, EHS, and Child Care funding sources indicate funding by DFSS**
  - For your own HS or EHS grant, use "Non-DFSS HS" or "Non-DFSS EHS." For Child Care funding through Action for Children, use "Certificate."

% of salary identified must match the approved budget across all funding streams.

-DO NOT allocate % of salary to HS, EHS, or Child Care unless funded by DFSS.

<u>Credentials:</u> Click tab

| COPA | | | | | 📢 Notifications | myDashboard | 👥 Forum | Tutorials | Sign Out |

‹ IR | Assessment | eDocs | *Inventory* | Monitoring | *DMR* | *Fees* | Card Scan | Family | Child | Enrollment | Agency | Reports ›

| Personal Info | Employment Info | Credentials | Medical Records | User Defined | Absence Info | Professional Development Plan | Staff e-Docs |

Staff Profile

- **Click 🖊 to edit or update**

| COPA | | | | | 📢 Notifications | myDashboard | 👥 Forum | Tutorials | Sign Out |

‹ HR | Assessment | eDocs | *Inventory* | Monitoring | *DMR* | *Fees* | Card Scan | Family | Child | Enrollment | Agency | Reports ›

| Personal Info | Employment Info | Credentials | Medical Records | User Defined | Absence Info | Professional Development Plan | Staff e-Docs |

Staff Credentials ❓

| **Name:** Sanchez, Becca | **Agency:** FSS | **Site:** Blue North | **Employee ID:** |

Credentials 🖊

- **Complete fields on Credentials screen;**
  Tip – Official evidence of qualifications should support program requirements & uploaded to eDocs

  - <u>**Education Level/Degree –**</u> Use drop down to select one of the following;
    - Degree (Awarded/Conferred)
    - CDA – Credential certificate (leave Major blank) *Note – Do not select CDA Training*
    - If high school completion is highest academic achievement select GED/HS Diploma (leave Major blank)

    Enter Major – Only if degree awarded: Use drop down menu to select Major and date awarded

    If staff is going to school, complete – *Enrolled Toward next degree & Major*

    Current or Former HS Parent – use drop down menu to select: Yes or No (HS/EHS staff only)

    Years of experience in Education – identify # of years

    Years of Experience teaching infants and/or toddlers - identify # of years

    If Teach For America – ☑ check box & obtain document to verify ECE Content Exam was passed & upload w/ eDoc transcript documents.

    Certifications & Credentials – use drop down to select **PEL / Type 04** **(Relabel = PEL / ECE)**
    Add PEL license renewal date
    Note - see next page to enter Gateways ID & Credentials

    Years of experience working/teaching Preschool – identify # years

- **Click Submit**

Uploading Documents to eDocs:

Upload Background Check, Official Transcript, PEL License, Gateways Credential, CDA Certificate

Scan document and name it something recognizable & consistent across agency
Examples: ITCred-AndersonJ.pdf
         ECECred-GonzalezM.pdf
         PEL-JordanJ.pdf
         BA-RobinsonR.pdf

- **Staff must be entered in COPA HR BEFORE documents can be uploaded to eDocs**

- **Scan document for eDoc upload -** name document as something recognizable & consistent across agency

- **Click eDocs tab displayed at top of page.**

- **Click Staff**

- **Enter Staff Last Name**
- **Select Submit**
- **Click on Staff ID**

- **Select Choose File**
- **Select Document Type –** use drop down menu to select;
        Background Check or…
        Transcripts

- **Click Upload**

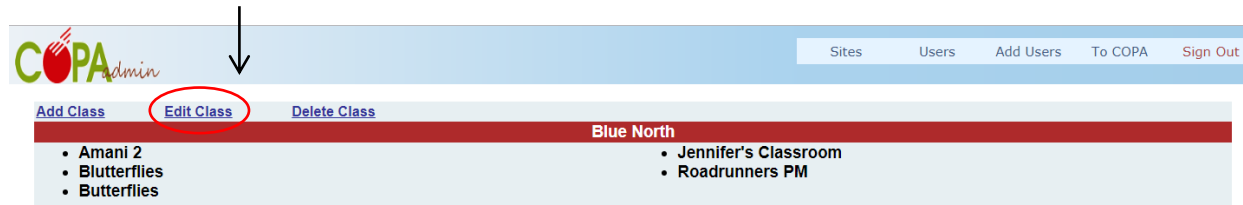## Assign Education Staff to Classrooms:

Monitored via COPA 973 customized report for qualifications or 970 report by site

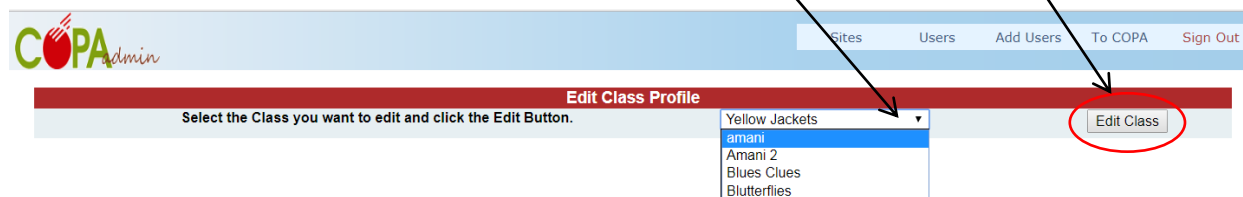**Teaching staff must first be entered in COPA HR, and then added to the classroom.**

- **Log out of COPA HR…. Log on with COPA <u>ADMIN</u> user name & password.**

- **Click Admin tab displayed at top right of the page.**
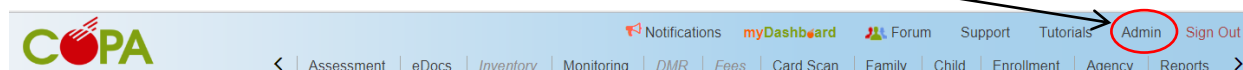
- **Select your Agency & Site Name**

- **Click – Edit Class**

- **Select Classroom Name from drop down menu; Click Edit Class**

- **Select Teaching Staff #1 –** use drop down menu to select teacher's name
- **Select Teaching Staff #2 -** use drop down menu to select teacher's name
- **Select Teaching Staff #3 -** use drop down menu to select teacher's name, if applicable
- **Click Update Class – to save**
- **Repeat for all classes;** center-based, home-based groups, & family child care homes.

COPA Admin			Sites	Users	Add Users	To COPA	Sign Out

Class Profile

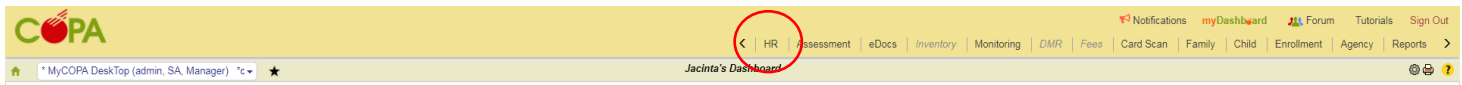|				
Agency / Site	FSS / Blue North		Status ◉ Active ○ Inactive	
Class Name	Yellow Jackets	County	Cook ▼	
*Class Type	Center based program-5 days a week ▼	Day Off	▼	☐ Closed
*Class Program Model	Head Start Center ▼ ☑ *Serving Preschool-Aged Children	Instruction Language	English ▼	
Class Size	20	Day Option ◉ Full ○ Part ○ None	☑ *Directly Operated	☐ *Double Session Class
Class Capacity	Up to 5 yrs ▼	+ ___ ▼ + ___		
*Teacher	Please Select ▼	Teacher entry date to class	09-02-2008 📅	mm-dd-yyyy
*Assistant / 2nd Teacher	Please Select ▼	# of Additional Teaching Staff	1	
*Assistant / 3rd Teacher	Please Select ▼			
*SchoolYear Start	09-05-2016	*School Year End	09-03-2017	
Class Start Date	09-05-2016 Update through Universal Class Start/End Update under Admin.	Class End Date	09-03-2017	
Comments				

ECERS Information

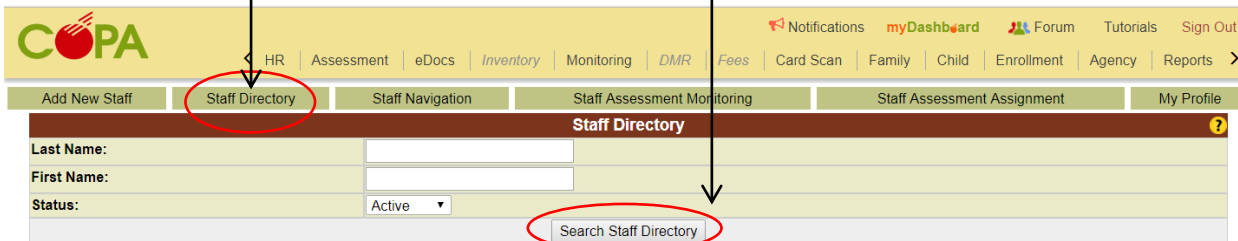| Score Dates	Average Score	Initials
1.		
2.		

Update Class

CSD
Children Services Division
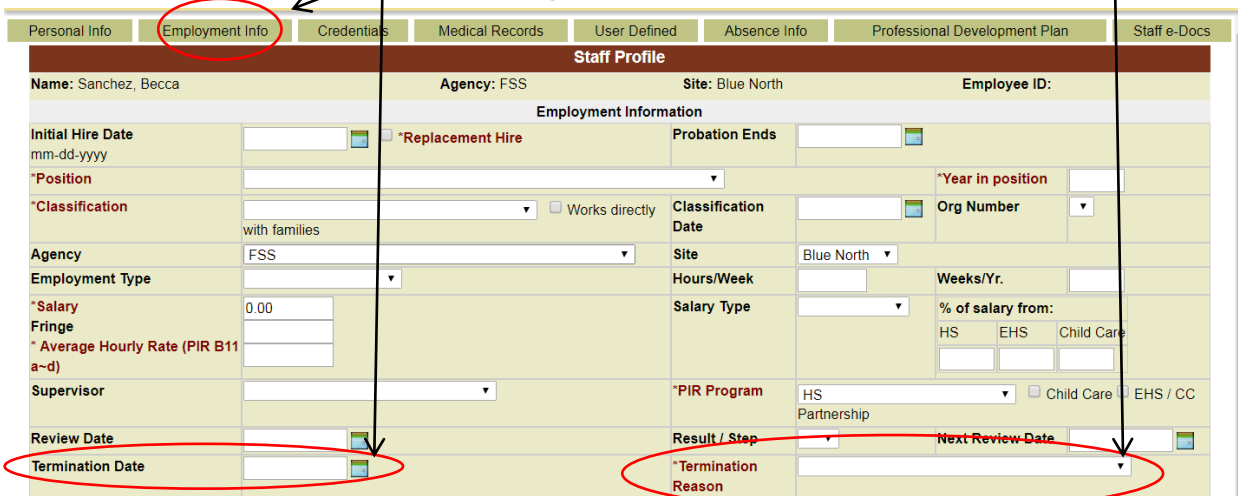
Staff Turnover

- **Log on with COPA HR user name & password.**
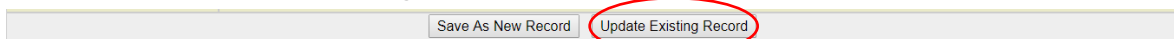- **Click HR tab displayed at top center of the page.**

- **Click Staff Directory –** Type Staff Name & Click Search Staff Directory
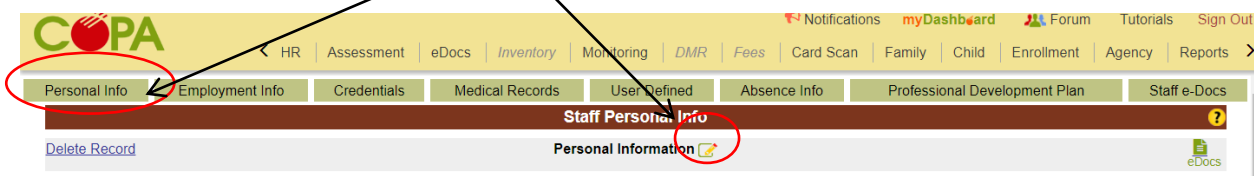

- **Select Staff Name & Click Employment Info Tab**
- **Add Termination Date & Identify Termination Reason** – use drop down options

- **Click – Update Existing Record**

- **Click – Personal Info Tab & 🖊 to edit or update**

- **Click – Inactivate**