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.

Welcome to COPA - pass X	(100000 (100) (100)	
\leftarrow \rightarrow C (3) https://cys.mycopa.com/child/index.epl?auth_user=		무 ☆ :
СФРА	Assessment eDocs Inventory Monitoring	€ ¹ Notifications myDashbeard 22 Forum Tutorials Sign Out DMR Fees Card Scan Family Child Enrollment Agency Reports >
↑ MyCOPA DeskTop (admin, SA, Manager) *c - ★	Jacinta's Dashboard	@= ?
▲	My Quick Links *c 🖌	
Add quick access buttons to your	favorite and most commonly used screens by clicking on the pencil icon 🖌 next to "My Quick Links" on the to	op header.

ADDING NEW STAFF

Click -, Add New Staff on top left to access Staff Profile.

/Tip – prepare background check & qualifications documents before adding staff.

Welcome to COPA - pass	× View Tab × New Tab	×			
\leftrightarrow \rightarrow C $\textcircled{0}$ https://cy	.mycopa.com/child/index.epl?auth_user=				₽☆:
СФРА	k		K HR Assessment eDocs Inventor	পে Notifications myDashb ard য় ny Monitoring DMR Fees Card Scan Family Child Enro	
Add New Staff	Staff Directory	Staff Navigation	Staff Assessment Monitoring	Staff Assessment Assignment	My Profile
			Staff Profile		

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: <u>https://www.census.gov/topics/population/race/about.html</u>

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



			Staff Profile			
			Personal Information			
All Agencies	 All Sites 					
Status	Active Inactive					
First Name	Mr. 🔻		M.I.		Last Name	
Address					Employee ID	
City			State	Illinois 🔹	Zip	
Home Phone			Work Phone		Ext.	
Mobile Phone	Consents	to Receive Text Messages	Email			
Social Security			Gender	Male •	D.O.B.	
ID #			ID Expiration Date			
ID Type	•		Additional ID Type	T		
Language		¥	Secondary Language		Proficient	
*Proficient in more than	m one language other than English 🗆		PIR Program		Child Care EHS / CC Partnership	,
Ethnicity	Race		 Image: A set of the set of the	110		
Latino	Asian	Black / African American		HS EHS		Multiracial
	Pacific Islander	Caucasian		HS/EHS		Unspecified
	Pacific Islander	Caucasian				Unspecified

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.

		-	Salary and Fun	ding source			
*EHS-CCP	~	*Child Care	~	*EHS	~	Select Funding Source	~
% of Salary 50		% of Salary 50		% of Sal	ary	% of Salary	
Select Funding Source	~	Select Funding Source	~	Select Funding Sour	ce 🗸	Select Funding Source	~
% of Salary		% of Salary		% of Sal	ary	% of Salary	

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

Personal Info	Employment Info	Credentials	Medical Records	User Defined	Absence	nto Profe	ssional Developr	ient Plan	Professional Affilia	itions S	taff Assessment	Staff e-D
•					Staff Em	ployment info						
Name: Carina and			Ager	ncy: 🝽 🖿		Site: Rise	*	_	Employee ID: 100			
					Employm	ent Information						
Effective Date	04-18-2018	1				nitial Hire Date	10-16-2006		*Replacement Hire	Probation	Ends 04-16-2	007
Interview Date						Start Date	11-01-2006					
*Position	Professional IV			•			\sim			*Year in po	sition 12	
*Classification	Child Development	Staff	Vorks	directly with familie	es	Classification Da	te 11-01-2006			Org Numb	er 🔻	
					-							
1												

Guidance – Position, Classification, & Employment Type

Note - Chart below includes examples and is not inclusive of all positions

- All state 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 Child Development Staff – works with ages 3-5	Permanent Staff for employee Contracted for sub			
Assistant Teacher	Assistant Teacher Infant & Toddler Child Development Staff - works with ages 0-3 Child Development Staff – works with ages 3-5				
Teacher Aide	Infant & Toddler Child Development Staff - works with ages 0-3 Child Development Staff – works with ages 3-5	Permanent Staff			
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.







					Notificat	ions myDashbeard	🤽 Forum	Tutorials	Sign Out
	< HR	Assessment	eDocs Inventory	Monitoring DMR	Fees Card Scar	Family Child	Enrollment	Agency R	eports >
Personal Info	Employment Info	Credentials	Medical Records	User Defined	Absence Info	Professional Deve	lopment Plan	Staff e	-Docs
			9	taff Credentials					?
Name: Sanchez, Be	сса		Agency: FSS	Sit	e: Blue North	Emp	ployee ID:		
Credentialis 🧭									

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

- Education Level/Degree – 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 – <u>w</u> 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

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Personal Info	Employment Info	Credentials	Medica	al Records	User Defined		Absence Info		Professi	onal Development Plan	Staff e-Docs
					Staff Profile						
Name: Sanchez, Becca			Agency: FS	S		Site: Blue I	North			Employee ID:	
This is a					Credentials						
Education Level / Degree									•	Contraction of the second	
Enrolled toward next dec				Major					•	Date Awarded Date Started	
Units/Credits Toward Nex		Six or more o		Next degree o	equired Units/Credits					Date started	
*Current/Former HS Pare	-	Six or more c	ourses	Currently In C							
*Years of experience in E					erience working/teaching Pi	eschool-a	ge children >				
*Years of Experience tea	hing infants and/or toddlers										
Years of experience usin				Hours of Train	ing on 🔹						
				Number of inf	ant/toddler units completed						
*Admitted to Teach for	America and Passed Early Childhood Co	ontent Exam									
Educational Level / I	Degree is appropriate to the option in which	h staff is working									
Permits				Permit #				R	enewal Date		
	•										
	•										
Certifications & Credent	als			Certificate #					enewal Date		
	•										
	•										
Comments											
					Reset Update						

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

CŰ	PA		Assessment (eDocs Invento	ory Moni	♥ Notificatoring DMR			Support Tuto hild Enrollment		Sign Out orts >
Child	Family	Staff	Volunteer	Agency	Site	Class	Monitoring	Docume	nt Directory	File Sharin	g 🏠

- Enter Staff Last Name
- Select Submit

• Clic	k on Staff ID			
CŐPA	Assessment eDoes Inver	Notifications myDashbear		Admin Sign Out
Child Family	Staff Volunteer Agency	Site Class Monitoring	Document Directory	File Sharing
All Agencies	All Sites Last Name:	Employee ID:	Submit Select, Submit, and then C	Click on staff ID

- Select Choose File
- Select Document Type use drop down menu to select;

Background Check or... Transcripts

Click Upload 、

 Last Name: anders 	son Em	ployee ID:	Subr	nit Select, Submit, and	d then Click on staf
Name: Anderson, Jody		Agency: FSS	Site:	Employee ID: 103154	
· · · · · · · · · · · · · · · · · · ·		• •	Document		
Document Name	Choose File No	file chosen		\frown	
Document Type	Background Chec	k		Add Docur	ment Type
Document Category	Please Select Doo	c. Category ▼		\smile	
Keywords					
Comments					
Maximum file size cann	ot be more than 10		bload		
industriant nio 5120 cum	or be more than to				
		Staff Do	ocuments	Us	age: 0 B of 500 MB
Name Ty	/pe Size	Upload	Date	Created By	Status

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 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.



C [©] PAdmin				Sites	Users	Add Users	To COPA	Sign Out
		Class Profile						
Agency / Site Class Name "Class Type "Class Program Mode Class Size Class SopaCity "Teacher "Assistant / 2nd Teach "School Tear Start Class Start Date Comments	20 Up to 5 yrs V Please Select V	*Serving Preschool-Aged Children Day Option Full Part None +	County Cook Day Off Instruction Lang Pirectly Ope Teacher entry d # of Additional T "School Year En Class End Date	rated *Do ate to class feaching Staff	v Duble Sessio	Status Activ Closed	e Inactive	
Score Dates		ECERS Informatio Average Score	n	Initials	s			
1. [2. [Update Class						





Staff Turnover

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

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↑ * MyCOPA DeskTop (admin, SA, Manager) * c	cinta's Dashkoard © @	?
	• • • • •	

Click Staff, Directory – Type Staff Name & Click Search Staff Directory

СФРА	HR Assessr	nent eDocs Inver	ntory Monitoring DMR	€ Notifications myDashbeard 21. Forum Tutorials Sign Out Fees Card Scan Family Child Enrollment Agency Reports >
Add New Staff St	taff Directory	Staff Navigation	Staff Assessment Mo	oritoring Staff Assessment Assignment My Profile
			Staff Directory	?
Last Name:				
First Name:				
Status:		Active •		V
			Search Staff Directory	

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

Personal Info	loyment Info	Credentia	s Medical Records	User Defined	d Absence Ir	nfo Profes	sional Deve	lopment Pla	n	Staff e-Doc
				Staff Profile						
Name: Sanchez, Becca			Agency: FSS		Site: Blue North		Em	oloyee ID:		
			E	mployment Informa	ation					
Initial Hire Date			*Replacement Hire		Probation Ends					
mm-dd-yyyy										
*Position					•		*Year in	position		
*Classification			•	- monto anootiy	Classification		Org Nu	nber	•	
	with fam	ilies			Date					
Agency	FSS			T	Site	Blue North 🔻				
Employment Type			v		Hours/Week		Weeks/	Yr.		
*Salary	0.00				Salary Type	•	% of sa	lary from:		
Fringe							HS	EHS	Child Car	e
* Average Hourly Rate (P	PIR B11									
a∼d)										
Supervisor			•		*PIR Program	HS		🔹 🗆 Ch	ild Care	EHS/CC
						Partnership				
Review Date			/		Result / Step	-	Next Re	view Date	-	
Termination Date		1002	>		*Termination					
					Reason					

Click – Update Existing Record

Click – Personal Info Tab & 🖉 to edit or update

	₹ ^J Notificatio	ons myDashbeard 🎎 Forum	Tutorials Sign Out
HR Assessment	eDocs Inventory Monitoring DMR Fees Card Scan	Family Child Enrollment A	Agency Reports >
Personal Info Employment Info Credentials	Medical Records User Defined Absence Info	Professional Development Plan	Staff e-Docs
	Staff Personal Info		?
Delete Record	Personal Information		eDocs

Save As New Record Update Existing Record

Click – Inactivate

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