

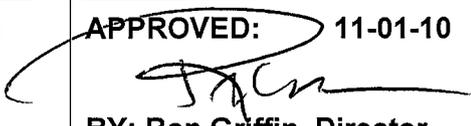


**COUNTY OF SAN BERNARDINO
PRESCHOOL SERVICES DEPARTMENT
POLICY**

NO. 01 ISSUE 1
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EFFECTIVE: 11-01-10

SUBJECT: Procedure for Monitoring Record Keeping through Technology

APPROVED: 11-01-10


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PURPOSE

To use a Technology System to monitor, report and manage the Grantee, Delegate Agency and Partner programs through a centralized database. Child Outcome Planning & Administration (COPA) software is a Web-based system currently utilized by Preschool Services Department (PSD). COPA is designed to centralize data collection and provide reporting and monitoring tools for all levels of the organization including Grantee, Agency, Site, Class, Child and Family. COPA provides secure multi-level access for the privacy and integrity of data as well as individual and group reports.

POLICY

PSD uses the information entered into the COPA system as a tool in the monitoring process to ensure the department maintains compliance with federal and state standards, identify gaps in service and identify strengths.

REFERENCE - Head Start Performance Standards

1304.51(i)(2); 1304.51 (g)

PROCEDURE –

Service Area Managers, Program Supervisors and Quality Assurance staff will monitor the Grantee, Delegate Agency and Contract Partner sites using an agency designed Child's File Checklist, as well as COPA reports.

The Managers and Supervisors will input data in the monitoring section of COPA under "New Site Visit" to document the following:

- Agency name, site and program
- Type of visit
- Compliance gaps
- Service area findings
- Strengths

A Plan of Action will be initiated through assigning a person responsible for the Action and the date for bringing any non-compliant findings into compliance.

When the Plan of Action has been completed the status will be entered as "Verified Complete" with a completion date.

There are two (2) reports that can be utilized in COPA to record monitoring visits:

1. Monitoring Tab – Statistics – can be filtered by Agency and Site.

2. Reports Tab – 820 Monitoring Smart Report – can be filtered by Agency and Site. Can be downloaded to Excel, the format can be saved in COPA by naming the report.

Services/Auditor Managers will physically monitor the Grantee, Delegate Agency, and Partner Sites using, Agency Designed Checklist, Federal and State Applications, County, Licensing Forms to monitor Education, Health, Nutrition, Disability, Mental Health, Fiscal and Safe Environments.

Outcome Planning & Administration (COPA) system – The Services/Auditor Managers will input data in the Monitoring Section in COPA under New Site Visit to document the Agency, Site, Department, Program Model, Visit Type, any Compliance Gaps, Service Area Findings, summarize the findings.

In addition a Plan of Action must be initiated by assigning someone Responsible for Action and the Date for bringing any non-compliant Service Area Finding Compliance Gap compliant.

To ensure in COPA that Service Area Finding/Compliance Gap is compliant the Service/Auditor Managers will finalize in the Action Plan Status by selecting Verified Complete and date Due Date/Completion Date.

COPA has two Reports

- Monitoring Tab – Statistics – This Report can be filtered by Agency and Site clicking on the underscored numbers under Columns Headings will give you statistical information for the Heading Titles.
- Reports Tab – 820-Monitoring Smart Report - This Report can be filtered by Agency and Site clicking on the desired fields to include in the report a personal report to View Report, Download Report to Excel etc. and the report can be memorized by formatted for future use by entering a report name.

Monitoring reports/tools available on COPA , not currently being used:

Audit Instruments – Audit instruments are tools used by the auditing team to track what aspects of sites are or are not compliant.

Checklist – Checklist is a tool for Site Supervisor to use to ensure they are in compliance.

Tracking and follow-up – site auditing, in the monitoring section, facilitate the auditing of sites and classes, creating a system for tracking and following up on issues. It also generates raw data that can be used for statistical analysis.