Local
Evaluation
Online

LEO Quick Start

Introduction and Tour

For: All LEO Users

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California Department of Public Health
Office of AIDS

Introduction

Welcome to LEO! This Quick Start Guide is designed to get you up-and-running with a minimum of effort. In includes an overview of the components and functionality of the Local Evaluation Online (LEO) system, including a 'tour' of the interface.

How to use this guide

The LEO Quick Start Guide is made up of several documents covering different topics, organized according to the relevant functional module in LEO. For example, there is a Quick Start document covering the Administrative Module, the Data Entry Module, the Report Module, etc. This document, "LEO Quick Start: Introduction and Tour" contains a general introduction and overview of LEO.

If you are new to LEO, please take a few moments to read this document and walk through the tour. Once you've read the overview, you will have a better sense of the functionality contained in LEO and where to find additional help.

Overview of LEO

LEO is a web-based application that is designed to capture information relevant to California Department of Public Health/Office of AIDS (CDPH/OA) -funded HIV prevention activities, including HIV Counseling & Testing and Education & Prevention programs. The system is called "Local Evaluation Online" because it is designed to enhance the ability of local agencies to assess the activities of their own programs by using LEO reports to learn about clients and service delivery.

LEO currently exists as two separate applications, one containing most C&T functionality, and the other containing all E&P functionality, as well as cross-cutting program activities such as LEO Reports and Partner Services. The next stage of development will include integrating the two applications into a single application containing all of the functionality for C&T, E&P, and other OA-funded activities.

As you use LEO, you will find a multitude of system enhancements small and large designed to eliminate or reduce the time and effort to accomplish certain tasks, such as auto-filling of some fields based on previous data; automatic notifications when something needs attention, such as training due dates or quality assurance procedures; and systems for tracking items that require additional follow-up. Because LEO is a web-based system, enhancements can be done seamlessly, with no action required on the part of the user.

Since LEO is constantly being modified to enhance efficiency, correct errors, and respond to program changes, this help documentation is considered a 'living document' and will be updated as appropriate to reflect system changes. When the documentation has been updated, the 'version' date on the cover page will be changed to reflect the most recent update so that you can verify that you are using the most current version of the documentation.

LEO Tour

If you are new to LEO, please take a few minutes to review the information in this LEO Tour. If you have login information, you can also 'cruise around' in LEO and look at things for yourself.

The Basics

LEO is a web-based system, so you'll need a computer with an internet connection, and browser software such as Internet Explorer or Mozilla Firefox.

The LEO Resource Page on the CDPH website contains links to login to the C&T and the E&P versions of LEO, along with other helpful information and links to forms and technical assistance resources. Note that if you are a LEO User for both C&T and E&P, your User ID and Password will be the same on each system. The LEO Resource page is here: www.cdph.ca.gov/programs/AIDS/Pages/OALEO.aspx

Getting Into LEO

Get a LEO Account

You will need a LEO user account to access LEO, including a user name and password. If you do not have a current LEO user account, you can request one by going to the LEO webpage and clicking on "Add a LEO Account" or by contacting your program consultant. *Once you've received your User ID and Password, see the Password Tips section later in this document to learn how to set up a secret question and answer, in case you forget your password.*

Login to LEO

- Go to the LEO Resource page at http://www.cdph.ca.gov/programs/aids/Pages/OALEO.aspx
- Bookmark this page.
- Click on the appropriate **Leo System Login** link.
- Enter your username and password in the dialog box.
- Press [enter]. You will be taken to the Main Menu of LEO.

Problems Logging In?

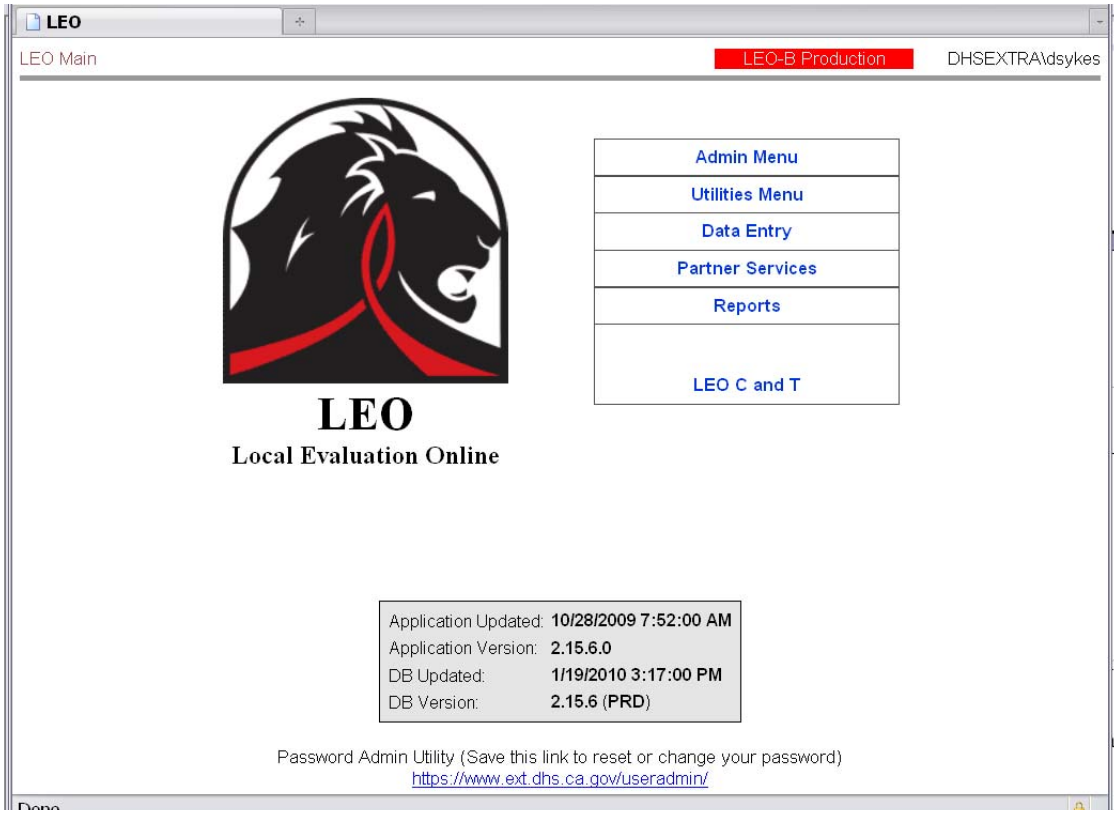
If you have problems logging in, you can request a password reset by going to the LEO webpage and clicking "Reset my LEO password." You will receive an e-mail with a link to allow you to reset your password. After you've reset your password, it may take 5 to 10 minutes before you can access LEO. (See Password Tips later in this document for more help.)

If you still can't log in you can request technical assistance from the LEO login page by clicking "LEO Technical Assistance Contacts."

Take the LEO Tour

Leo Main Menu

The LEO Main Menu is where you land when after you've logged in. From here, you can go anywhere in LEO.



Before you go anywhere, notice what is on this Main Page:

1. In the upper left corner, the words "LEO Main" appear as a link. This is the beginning of what is called a 'breadcrumb' trail. As you navigate deeper into the LEO system, this area will show the pathway you've taken. You can click on any of these breadcrumb links to go back to a previous screen.
2. In the upper right hand corner is system information, including your login name. If you share a computer with someone, you'll want to look up here to verify that you're logged in as you.
3. On the left side of the Main Menu page is the LEO logo. It doesn't do anything except remind you that you're in LEO and not some other system.
4. To the right of the LEO logo are the Main Menu links. You will use these links to navigate to various modules in the system. Each of the menu items on this page represent a 'module' in LEO which contains related functionality. Each 'module' has its own Quick Start document.
5. Near the bottom of the screen is LEO version information. This is mainly for the technical folks, but you can look at the dates to see when the latest LEO addition or improvement occurred.
6. At the very bottom is a link to the Password Utility, which allows you to reset your password by answering a secret question that you set up previously. You'll want to save this link as a bookmark in your browser, so you can access the password utility if you forget your password. (Remember, if you've forgotten your password, you won't be able to get to the LEO Main Menu, so you need to save this link as a bookmark in

your browser.) See Password Tips later in this document for information about how to set up a secret question and answer.

Deleting Information

As you explore in LEO, you will see a number of buttons. Often you will see a button that says "Delete," which may or may not be active. In general, LEO will not allow you to delete information that is 'connected' to other information. For instance, if you try to delete a location that is attached to an intervention, you will not be able to until you remove the location from the intervention (and anything else it might be attached to). If you already have client records from that location, you will not be able to delete it at all.

LEO prevents deletion of information in order to protect the integrity of the data contained in LEO. If one piece of information won't make sense without another, it won't let you delete it. If you make an error when entering, say, a location, and really do need to delete it later, it may take a few more clicks to remove it, but that's a relatively small price to pay to protect your data.

Navigating in LEO

Click on the Menu links
There are a handful of ways to move from place to place in LEO. The most obvious is to click on a link from the Main Menu or whatever menu you happen to be on.

Use the Breadcrumb links
A second, important way to navigate is to use the 'breadcrumb' links at the upper left of your screen. This is especially useful when you've edited information on one screen and want to go back to a previous screen. In fact, from some screens, these breadcrumb links are the ONLY way to navigate. If you've made changes, be sure to save your information before you navigate away.

Auto-navigation
In some cases, clicking 'save' after entering information will automatically take you back out to the main list of whatever you were editing – staff, agencies, interventions, etc.

***AVOID* the Back button**
Generally, you will want to avoid using the 'back' button on your browser to navigate in LEO, unless none of the other navigation tools are available. Although using the back button will often work, LEO consists of dynamic rather than static pages, so using the back button may sometimes generate an error.

Explore the Main Menu

Behind each of the menu items in the LEO Main Menu is functionality that you may need to use, depending on the job(s) you do in your agency and your roles in LEO.

We won't go through them in depth here, but let's explore just a little more…

Menu Name	Explanation

Admin Menu

The Admin module houses all of the functionality needed to set up agencies, locations, staff, and interventions, and to designate relationships between them. For instance, contracts are entered to show relationships between agencies. Staff information is entered, and then staff are connected to agencies as employees who perform specified roles. Locations are connected to agencies and to interventions.

Click the Admin Menu link, and you'll be taken to the LEO Admin Menu, where you will see links to each of the items mentioned above.

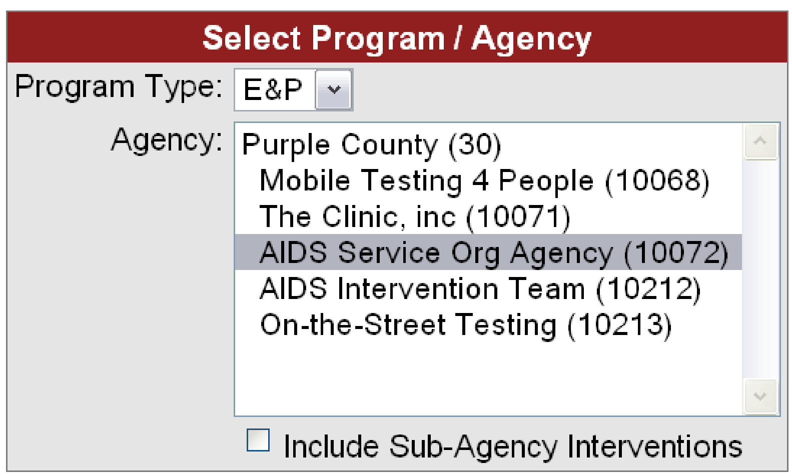
Explore the Interface: Interventions

Click on the "interventions" link.

The next screen shows the "Select Program / Agency" box at the top, and a table of interventions related to the selected program and agency below.

The "Select Program / Agency" box appears in many places in LEO, so let's explore it a little further.

Select Program / Agency Box



Program Types include C&T, E&P, and PCRS. If you are only involved in one program, such as E&P, that program will already be displayed in the pull-down menu. If you have access to two or more, you'll need to select the one you want to work with.

Once you've selected a program type, the list of agencies will re-populate with the hierarchy of agencies within that program that you have permissions for.

When you highlight an agency within the box, the interventions provided by that agency appear in the Interventions Table below. Click the ‘include sub-agency interventions’ checkbox to include interventions performed by agencies funded by the one that is highlighted.

Interventions Table

Interventions in AIDS Service Org Agency (10072) / E&P

Intervention Name	Intervention Id	Fiscal Year	Intervention Type	Service Provider	Funding Agency	OA Approved
Community Events	8	08-09	HCPI-Ed	AIDS Service Org Agency	Purple County	Yes
Core Groups	7	08-09	Group	AIDS Service Org Agency	Purple County	Yes
Individual Level Interventions	6	08-09	ILI	AIDS Service Org Agency	Purple County	Yes
Medium Size Events	9	08-09	HCPI-Ed	AIDS Service Org Agency	Purple County	Yes
Mpowerment Workshops	10	08-09	HCPI-Ed	AIDS Service Org Agency	Purple County	Yes
Somos Core Group	11	08-09	Group	AIDS Service Org Agency	Purple County	Yes
Somos Large Size Community Events	12	08-09	HCPI-Ed	AIDS Service Org Agency	Purple County	Yes
Somos Youth Mpowerment Workshops	13	08-09	HCPI-Ed	AIDS Service Org Agency	Purple County	Yes
Voices/Voces	14	08-09	ILI	AIDS Service Org Agency	Purple County	Yes

The interventions table lists information about all of the interventions for the selected program/agency – in this case, E&P interventions for AIDS Service Org Agency.

Clicking the blue intervention names will take you to a screen to set up edit the set-up for that intervention. You can also click each of the white underlined column headings to sort by that column. Click it again to sort in the opposite direction.

Most of the functionality in LEO works similarly – you choose the program/agency to display, and LEO displays information relevant to that program/agency combination, whether it is contracts, staff members, interventions, or other information.

Data Entry

Use the breadcrumbs at the top left of the screen to go back to the LEO Main Menu, then click “Data Entry.” On the next screen, you’ll see the program type and agency box, and below that a list of your agencies’ interventions. You can use the pull-down menus to filter the information to display only specific intervention types or fiscal years, and sort by clicking on the white underlined column headings.

Notice that the information about the interventions is a little different than the intervention table from behind the admin menu. That's because this is where you access interventions in order to enter data into them. From the admin menu, you are actually accessing the intervention set-up functionality.

Interventions in AIDS Service Org Agency (10072) / E&P

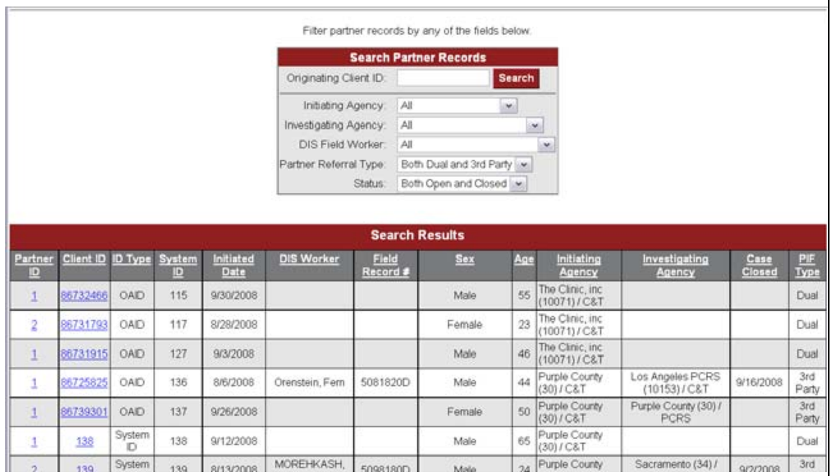
Intervention Name	Intervention Id	Intervention Type	Funding Agency	Service Provider	Fiscal Year	OA Approved	Encounter
Community Events	8	HCPI-Ed	Purple County	AIDS Service Org Agency	08-09	Yes	2
Core Groups	7	Group	Purple County	AIDS Service Org Agency	08-09	Yes	22
Individual Level Interventions	6	ILI	Purple County	AIDS Service Org Agency	08-09	Yes	0
Medium Size Events	9	HCPI-Ed	Purple County	AIDS Service Org Agency	08-09	Yes	3
Mpowerment Workshops	10	HCPI-Ed	Purple County	AIDS Service Org Agency	08-09	Yes	8
				AIDS			

If you click on the blue intervention name from here, you'll be taken to a list of client encounter records that have already been entered for that intervention. You'll also see a button that allows you to create a new encounter in this intervention, and enter the information from the client encounter form.

Partner Services

The Partner Services module is used to check on the status of Partner Information Forms (PIFs) in the system.

Go back to the LEO Main Menu and click "Partner Services" now. On the next screen, you see a search parameters box that allows you to search by Originating Client ID or filter the PIF records that appear in the table below by several different criteria.



Clicking on the Client ID in the search results table will take you to the original client encounter summary screen, if you have permission to see that client. Clicking the Partner ID takes you to the PIF itself. Notice that the same Client ID may appear several times in this table – one for each PIF associated with that client.

The Partner Services module is also where Partner Services notification staff enter ‘stand-alone’ PIFs - that is, PIFs that are NOT associated with clients who received C&T or E&P services. (PIFs from C&T or E&P clients are entered in the Data Entry module, in association with the original encounter form.)

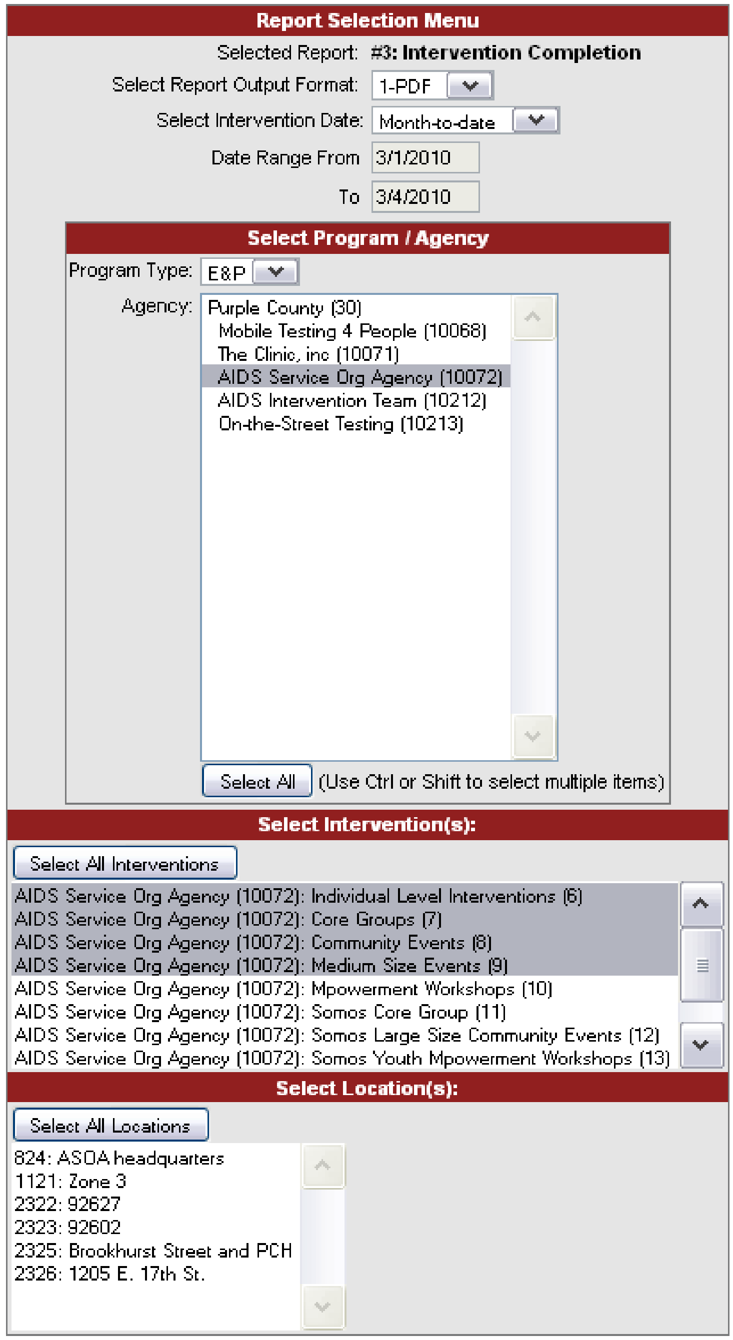
Reports

A big benefit to using a data collection system is the ability to get the information back out of the system in a format that is both meaningful and useful. Reports in LEO are designed to meet the specific needs associated with administering HIV prevention programs.

Some reports are ‘embedded’ in LEO. For example, the PCRS search result table is a type of report, as is the ‘table of interventions’ in the data entry module that lists the intervention name, type, number of records entered, etc.

However the bulk of LEO reports are accessed in the “Reports” module. *From the Main Menu, click “Reports.”* On the resulting screen, you see the list of reports that are currently available in LEO, along with a brief description of the report.

Click on Report #3, “Intervention Completion.” On the next screen, you see the report parameters that are available for this specific report:



You can specify the report output format (pdf or excel), and a date range. The familiar program/agency selection box is available so you can specify one or more agencies to include. (Note that many reports are program-specific.)

Once the agency/ies are selected, the “Select Interventions”

	box is populated with the interventions conducted by those agencies. Choose one or more interventions, and the "Select Locations" box is populated with only the locations associated with those interventions. Other reports may have slightly different selection criteria, depending upon the nature of the report. See the Report Module of the Quick Start Guide for an in-depth explanation of each report.

A Note About "Permissions"

Before we continue, it will be useful to understand something called "permissions." In any data system, it is important to both protect the information that is stored, and make the system easy for users to navigate and understand. "Permissions" help accomplish both of these goals.

In LEO, what information a user can access – including both viewing the information, and being able to add or change information – is controlled by the permissions that the user has. The permissions are set up based on 1) what agency or agencies a user is connected to, and 2) what their role(s) are within that agency.

For example, the E&P coordinator for Yolo County will be able to view and edit agency information for all of Yolo County, but not for Trinity County. And a person whose role is to enter client data will be able to enter and edit client data, but will NOT be able to edit contract information, or approve the shipment of test kits.

Setting up permissions in this way both protects the information by preventing unauthorized changes, and also makes the LEO system easier to navigate: Since users will generally only see information that is relevant to their role or job, they won't have to wade through a list of every agency in California to edit information for their LHJ.

There will be more about permissions and roles later, but for now, if you can't access some part of LEO, it may be because of 'permissions.'

That's the end of the LEO Tour. I hope it was helpful to get you oriented to some of the ways to use LEO. If you haven't already received your LEO User ID and Password, read on to learn how to request one.

LEO User ID and Password Tips

To access LEO, you'll need a User ID and a password. The information below will help you learn how to request an ID and password as well as how to maintain your user information to make sure your access to LEO is not interrupted.

LEO Resource Page: http://www.cdph.ca.gov/programs/AIDS/Pages/OALEO.aspx
Web Admin Utility: https://www.ext.dhs.ca.gov/useradmin

How to Request a LEO User ID

If you are a coordinator or site supervisor with staff members who need to access LEO to enter data or generate reports, you must request a LEO User ID for these staff members. Here's how:

1. First, make sure the staff members are entered into the LEO staff pages and all of the information is complete and correct, ***including a valid e-mail address*** for each one.
2. On the LEO Resource page, click the link that says "Add a LEO Account."
3. In the e-mail that opens, provide the name(s) of the staff member(s) who need LEO accounts. Be sure to identify yourself as the coordinator or site supervisor for these staff members, and indicate which LHJ and agency you are affiliated with.
4. Click 'send'

Within a few days, each of the staff members should receive a secure e-mail with their LEO User ID and a temporary password.

Once a User ID has been assigned, the site supervisor or coordinator must go to staff member's 'User Information' tab to be sure that system permissions are assigned appropriately. (On this page, staff members may be assigned to specific roles and access to specific interventions, depending on their duties. See the LEO Quick Start Guide for more info.)

How to Change a Temporary Password

Once you have received an e-mail with your User ID and temporary password, you must first change your temporary password to a password of your choosing by going to a special user utility. **You will NOT be able to login to LEO with a temporary password.** Here is the process:

1. Follow the directions to open your secure e-mail.
2. Once you've opened your e-mail, you will find three important pieces of information:
    a. Your User ID. (It will contain parts of your name, such as Pjones3, or Tgreene)
    b. Your temporary password. (It will contain several random looking characters, such as t%70?/y)
    c. A link to a web admin utility for changing your temporary password to a password of your choosing. (https://www.ext.dhs.ca.gov/useradmin)
3. Open a new browser window and paste in the url to go to the web address.
4. Type your User ID into the pop-up dialogue box.
5. Copy / paste your temporary password into the password box. (Do not try to type it.)
6. Follow the onscreen instructions to create your new LEO password. You should get to a screen that says "You have successfully changed your password."

Tip: Your new password should have at least 8 characters, a mixture of upper and lower case, and at least one non-alpha character, such as a number or special symbol.

Click the link that appears on this page, or go to https://www.ext.dhs.ca.gov/useradmin to set up your secret question, which you will need in case you ever forget your new password.

You may now use your User ID and new password to login to LEO.

How to Set Up a Secret Question

If you didn't set up your secret question and answer when you first changed your password, you should do so now. If you forget your password, you will be able to reset it by using your secret question/answer. To set up your secret question, follow the steps below:

1. Go to https://www.ext.dhs.ca.gov/useradmin. Type your User ID and password into the dialogue box that comes up.
2. Click the "Edit" button, and update your information, including selecting a secret question, and typing a secret answer into the box below.
3. Click the "Update" button to save your changes.

Important Note: ***You'll need to be able to select your question from a list and type in your answer*** in order to reset your password using this method.

How to Reset Your Password by Secret Question

If you set up a secret question and answer, you never have to worry about forgetting your password, because you can always reset it yourself by using your 'secret question.' Here's how:

- Go to the LEO Login page and click on the link, "Reset My LEO Password."
- On the next screen, type in your User ID, select your question, and type in your answer.
- Click the button "Get New Password." A new temporary password will be e-mailed to you.
- When you get your new temporary password, follow the directions above for changing your temporary password. (For security reasons, this e-mail will NOT contain your User ID or the link to the password changing utility.)

- If you have not set up a secret question, you will not be able use this process. You must contact OA and request a manual password reset.
- If you've forgotten your User ID, your supervisor or data entry clerk can look it up for you in the LEO staff pages. Your User ID appears on the User Information tab

How to Login to LEO

Once you have a LEO User ID and you have changed your temporary password to one of your choosing, you can login to LEO. Go to the LEO Resource page, click the appropriate "Login to Leo" link, type your User ID and password into the appropriate boxes, and click "OK."

If you cannot log into LEO with your User ID and new password, ask your supervisor to check that your information is entered into the LEO staff pages correctly – specifically, your User ID on the LEO Staff "User Information" tab must exactly match the User ID you received in your initial e-mail. Your User ID cannot be changed.

How to Get Help

If you need help, e-mail LEOHelp@cdph.ca.gov. Be sure to provide your name, LHJ/agency, your contact info, and a brief description of the problem. The LEO Help desk will respond as quickly as possible. ***Please be patient:*** Response times can range from a couple of hours to two days.