Local
Evaluation
Online

LEO Quick Start

Administrative Module

For:	C&T and E&P Program Coordinators and Supervisors
Contents:	• Adding/editing Agencies • Editing Contracts • Adding Locations • Setting Up Interventions • Adding/editing Staff
Version:	7/30/2010

California Department of Public Health
Office of AIDS

Table of Contents

Administrative Module

Overview

Before you can use LEO to record information about the services you provide, you will need to set up information about your agency or agencies, your personnel, the location(s) where you provide services, and the intervention(s) that you conduct. This information is contained in the administrative (admin) module of LEO.

In this section you will learn how to…

- Add sub-agencies that provide C&T or E&P services
- Edit contract information to define agency relationships
- Add/verify locations at which services are provided
- Set up interventions performed by each agency
- Enter staff information and assign appropriate roles and intervention access

Note that performing set-up tasks in the order listed is the most efficient way to accomplish all of the necessary tasks with a minimum of back-tracking. For example, although you might be tempted to enter staff information immediately after agency set-up, it actually works better to wait until after you set up interventions. That way staff may be assigned access to the appropriate interventions during the staff set-up phase.

Some information is shared across programs.
Agencies and other information in LEO are used for multiple programs, including Counseling & Testing, Education & Prevention, and PCRS. Some information, such as agency name and agency type, is shared by all programs. That means that changing it for one program changes it for all of the others. Other information, such as agency contacts, phone numbers, and location is designated separately for each program. That means that changing it for one program does NOT change it for the others. In the following screens, information shared by all programs will be indicated by a yellow information bubble.

Step 1: Add Sub-agencies

Note that in LEO, the term "agencies" includes the local health jurisdiction, as well as any CBOs or other entities that the LHJ may work with to provide services.

For each agency, you'll need to enter:

- Agency Name
- Agency Type
- Agency Location

For LHJ-level agencies, you'll also need:

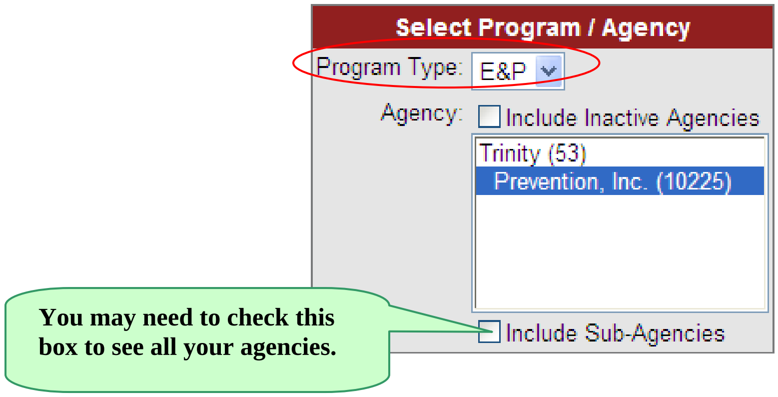
- DUNS
- EIN

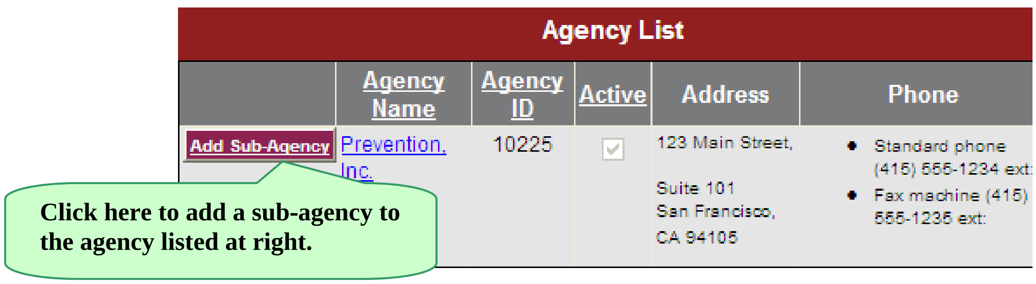
You should also be prepared to enter agency contact information, such as the phone and FAX numbers. After entering staff information into LEO, you can return to the agency screen to designate staff members as contacts for an agency.

From the Admin Menu

To Add a New Agency A.) Click on Agencies

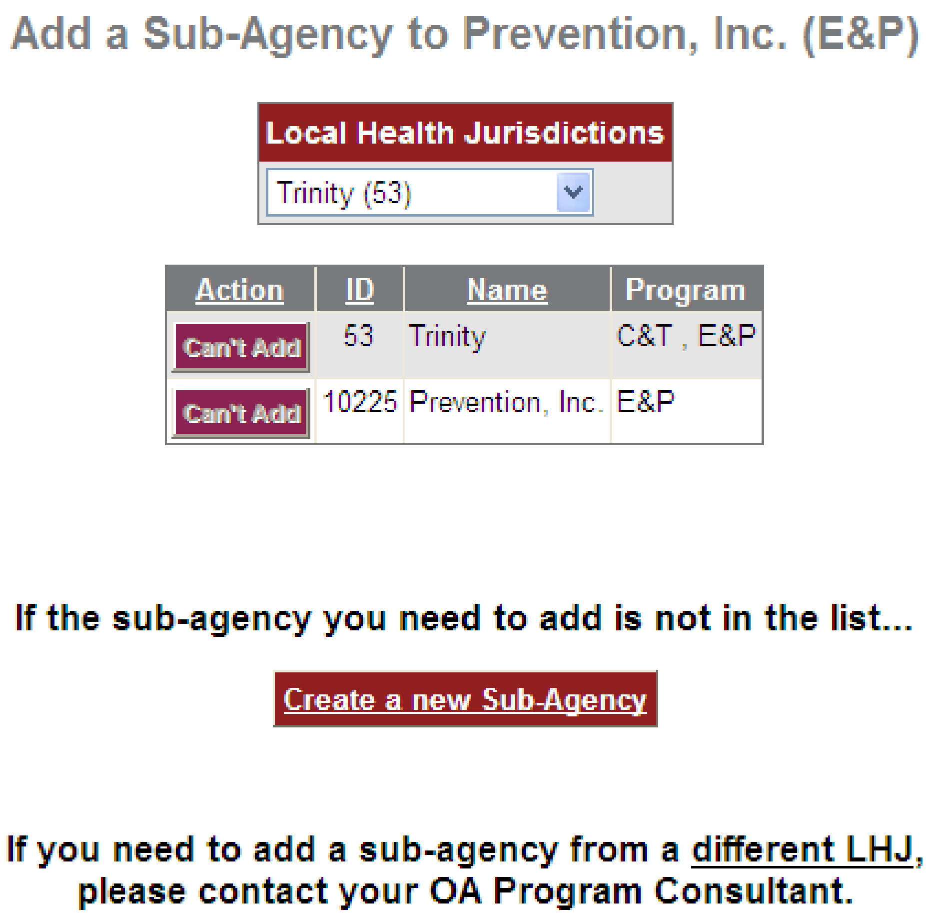
B.) Make sure the correct program/agency is selected in the box at the top of the screen.





C.) Click the [add sub-agency] button next to the agency that funds the sub-agency you want to add.

D.) If the sub-agency you want to add appears in the list, click the [add] button next to the agency.



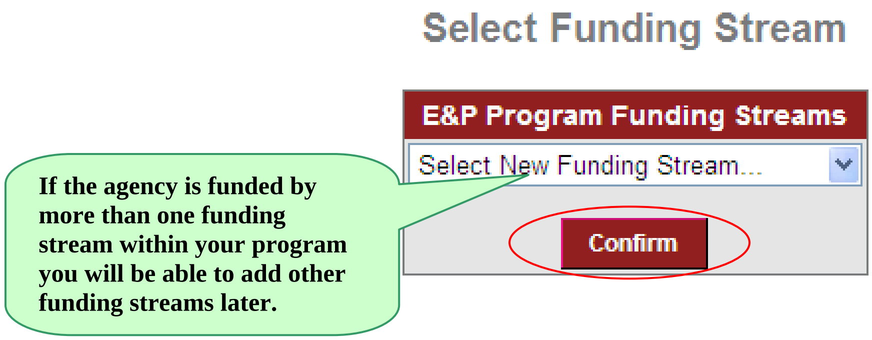
E.) If the sub-agency you want to add does NOT appear in the list, click the [Create a New Sub-agency] button.

Agency in another LHJ?:

If the agency you want to add is in a different LHJ, do NOT add it to LEO via this process. Ask your OA program consultant to add the agency for you. An agency from another LHJ may already be in the system, and adding it yourself will create a duplicate.

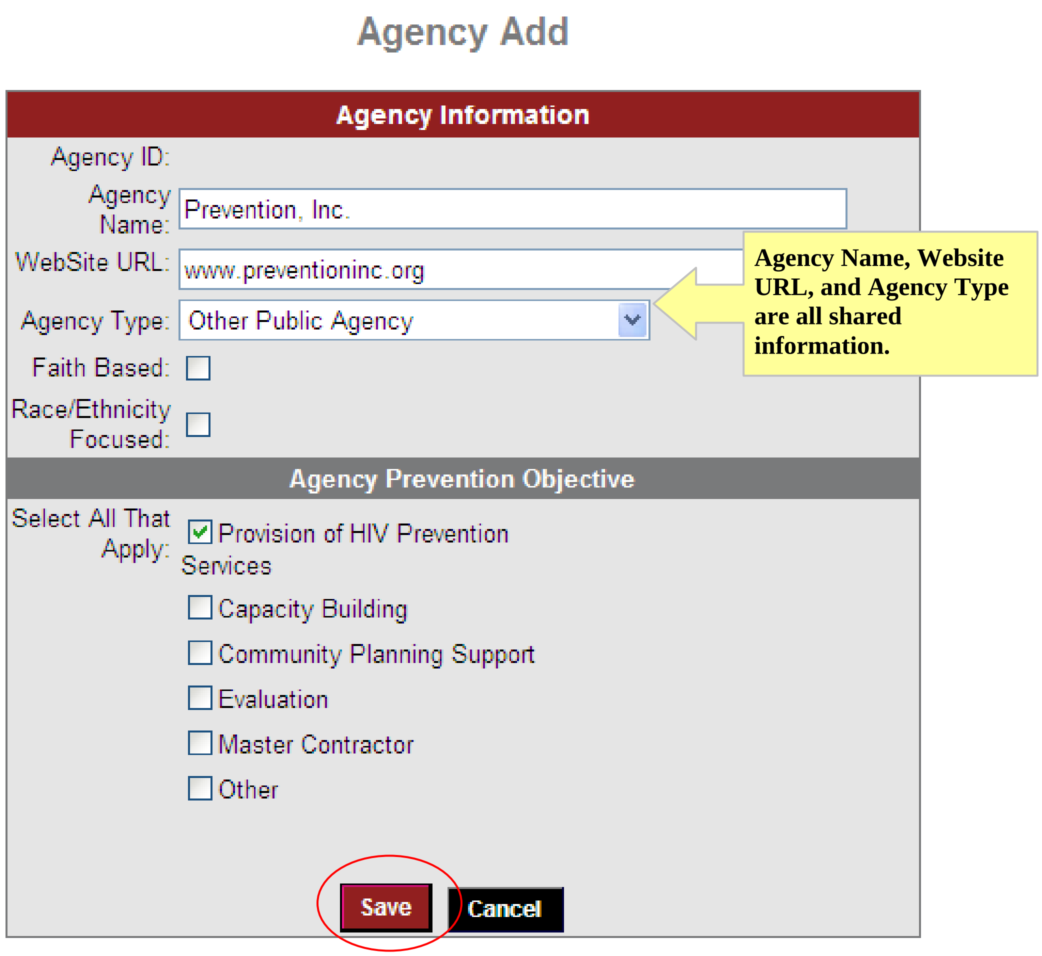
Select the Funding Stream

D.) Select the funding stream and click confirm.



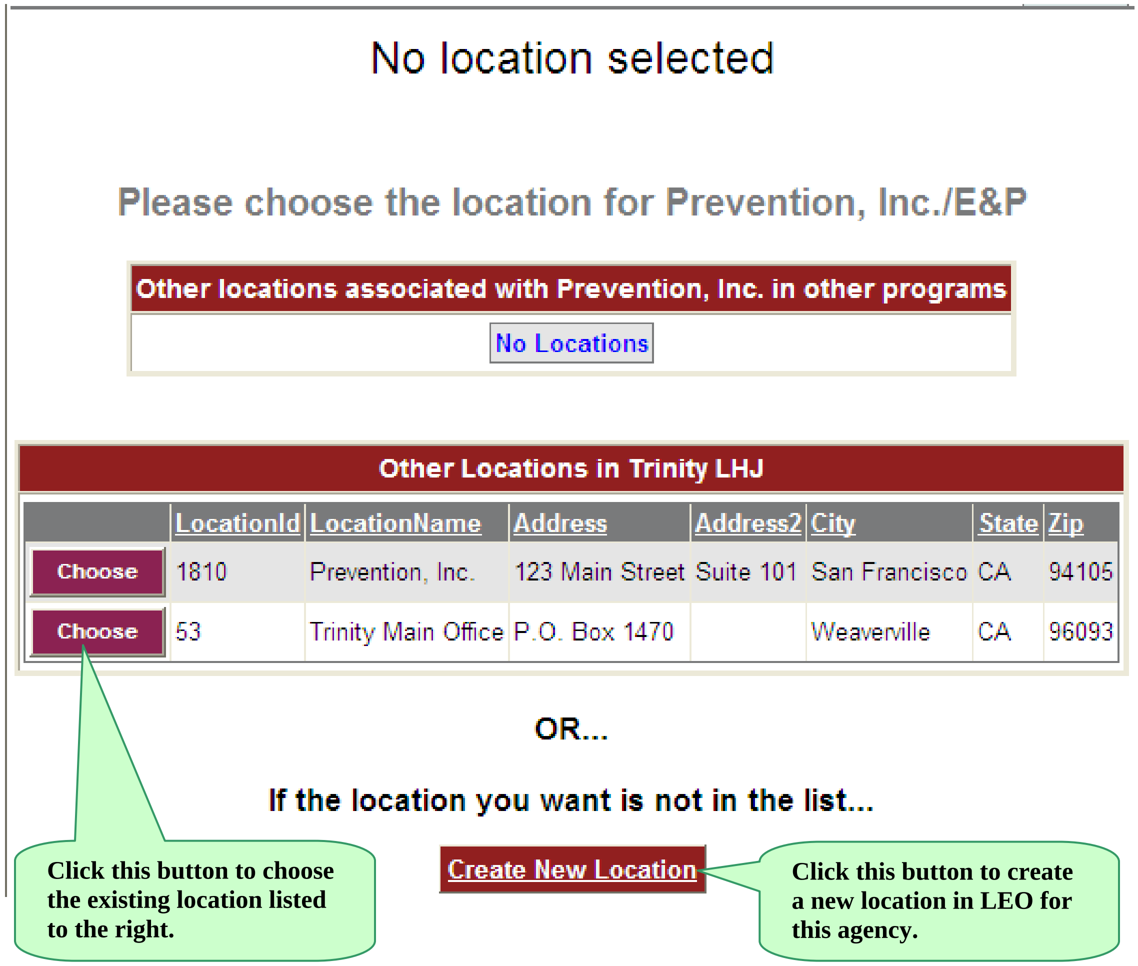
Adding an Agency not already in LEO

E.) If creating a new agency, enter agency name, URL, type, and objective. Note that these fields are shared across all programs for which that agency is funded.



Add a Location to the Agency

F.) Choose/confirm the agency location. If the agency location does not appear in the list, choose the [create new location] button at the bottom of the screen, enter the location information, and click [save].

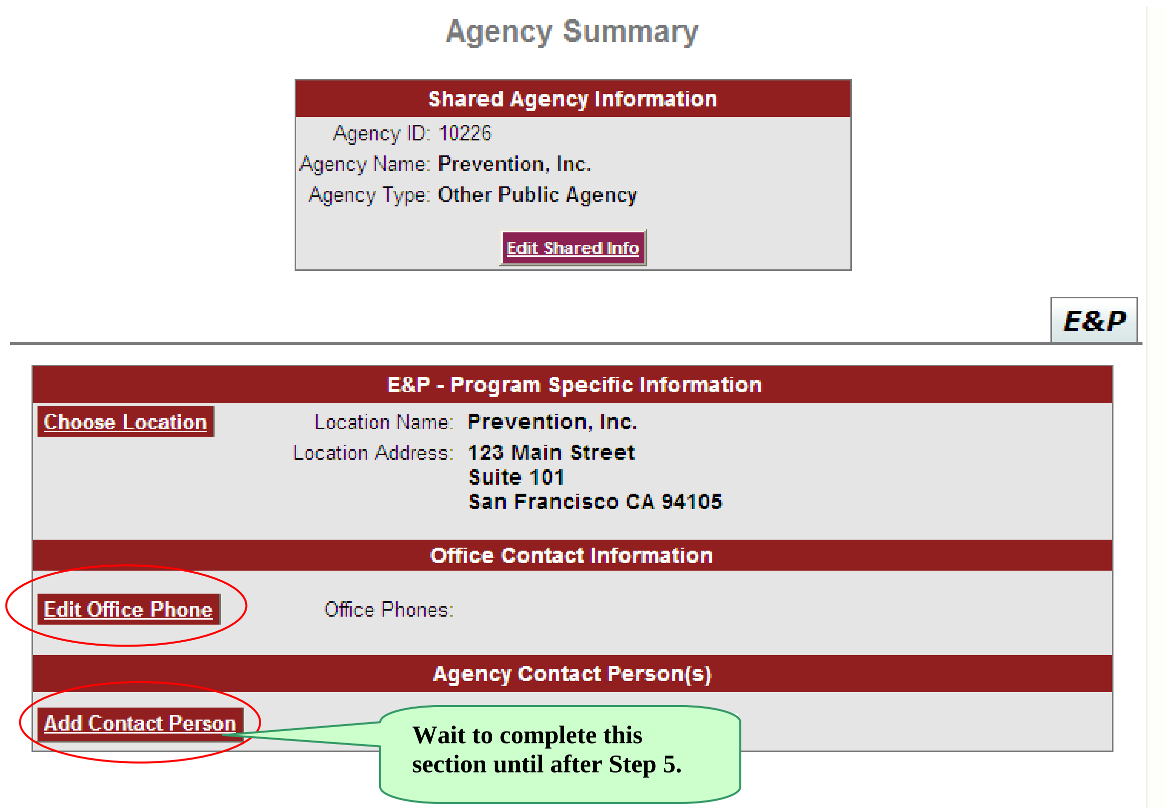


LEO Tip

The agency location should reflect the 'home base' of the agency/program (not necessarily where services are provided), and may be any location in LEO. Once entered, it appears in the location list in LEO and may be connected to other agencies or interventions as appropriate. An agency may have a different location designated for C&T, E&P, NIGHT, and PCRS, if appropriate.

Add Agency Phone Numbers

G.) On the agency summary screen, verify that the existing information is correct, and add contact information for that agency, including phone and FAX numbers. These should be main agency numbers (e.g., the front desk or receptionist). Contact information for specific agency staff are added in the next step.



H.) At the bottom of this screen there is a section labeled "Agency Contact Person(s)." In this area people in LEO may be designated as agency contacts.

Contact people for the agency/program may be selected from existing LEO person records. Their contact information populates this area from the data entered on their staff pages. If the person you wish to add as a contact person is not yet in LEO, you will need to add them first.

It is best to WAIT to complete this section until after adding staff information in Step 5, below. Once Step 5 is complete, it will be a simple task to quickly search for existing staff to designate as agency contacts.

LEO Tip: Contact Person Information

Contact Person information, such as phone numbers and e-mail addresses, are edited on the 'Staff" page for that person. Once edited, updated information will be automatically updated on the agency screen above.

Agency Field Descriptions

Field Name	Explanation
Agency ID	LEO automatically assignes a unique number to an agency once it has been saved in the system.
Training Agency Only	Check this box if the agency provides training ONLY and does not provide client services.
Agency Name	Enter the name of the agency here.
*The **Location Details** section contains information about the location of the agency. Enter the physical location of the agency - NOT the mailing address – if the physical location and mailing address for the agency are different. It does not matter if the agency provides services in this location or not. Service location information will be entered later.*	
Location ID	LEO automatically assignes a unique number to each location once it has been saved in the system.
Location Name	Enter name for the location, which may match or differ from the agency name. This name will appear in a drop-down list when selecting intervention locations.
Address & Address 2	Enter one or two lines of address information for the agency. (The 'Address' field is required. The 'Address 2' field is optional.)
City	Enter the agency city location here.
Health Jursidiction	Local health jurisdiction should be pre-selected in this drop down box. It is not possible to add locations to other LHJs, so if there is an agency or service location outside of the LHJ, you must request that the location be added by the LHJ Coordinator or OA staff.
State	California should be pre-selected in this pull down box.
Zip Code	Enter agnecy zip code.

Setting	Select setting type for this location. The ‘Setting Type’ should reflect the primary business of the location. For instance, if the agency is housed within an STD clinic, select “STD clinic” as the Setting Type, even though the agency may perform HIV testing. If no services are performed at this location, select ‘Other’.
Setting Details	Enter additional information describing the setting. (Note: This is a required field if the ‘Setting Type’ selected is ‘Other’.)
Comments	Optional field. Enter any comments for this location.
*The **Agency Information** section contains additional information about the agency, such as employer information and agency objectives.*	
Agency ID	LEO automatically assigns a unique number to an agency once it has been saved in the system.
Test Kit Storage ***(C&T only)***	Check this box if this agency maintains a stock of rapid HIV test kits, and is therefore required to run periodic controls to verify test kit status for quality assurance.
Active	This check box indicates the agency as ‘active’. (Authorized users can activate or deactivate agencies with the buttons at the top and bottom of the page.)
Duns ***(LHJ only)***	The Data Universal Numbering System (DUNS) 9-digit number is a CDC-required variable.
Employer Identification Number ***(LHJ only)***	The 9-digit Employer Identification Number (EIN) is a CDC-required variable.
Website URL	If the agency has a website, enter the URL here.
Agency Type	Select agency type: State Health Department, Local Health Department, Other Public Agency, Community-Based Organization, or Academic/Research Institution. If none of these choices apply, select ‘Other’.
Faith Based	Check this box if it is a faith-based organization.
Race/Ethnicity Focused	Check this box if the agency is a race/ethnicity-focused organization.
Agency Prevention Objective	Select all prevention objectives that apply to the agency.

*The **Contact Information** section cannot be edited directly. When you enter information about the staff affiliated with/employed by each agency, you will be able to indicate which individuals are 'agency contacts.' The contact information and the title for each individual who is designated as an agency contact will apear in this section automatically.*	
Agency Phone/Fax Information	Click the [Add Phone/Fax] button to add a main phone number and/or FAX number. Contact information for specific individuals at the agency should be completed on the Staff pages, and will appear in the section above is designated as agency contacts.

LEO Tip: Agency or Location?

Not sure if an old 'site' is an agency or a location? If the staff that performs the services is different from the staff at the parent agency it should be set up as an agency. If the staff from the parent agency goes there to perform the services, then it is a location. This distinction is important for reporting and for LEO permissions. If you're still not sure, contact your program consultant for help deciding.

Step 2: Edit Contract Information

LEO also stores information about each agency's relationship with other agencies. There may be sub-agencies that already have contracts, such as CBOs, or sub-agencies that are a part of the health department, with which you have no formal contract. Finally, you may also receive C&T or E&P data from agencies that are not OA-funded, which also do not technically contract with you to provide services. Each of these agencies must be connected to your primary agency with a contract in LEO in order to define hierarchical reporting and permissions.

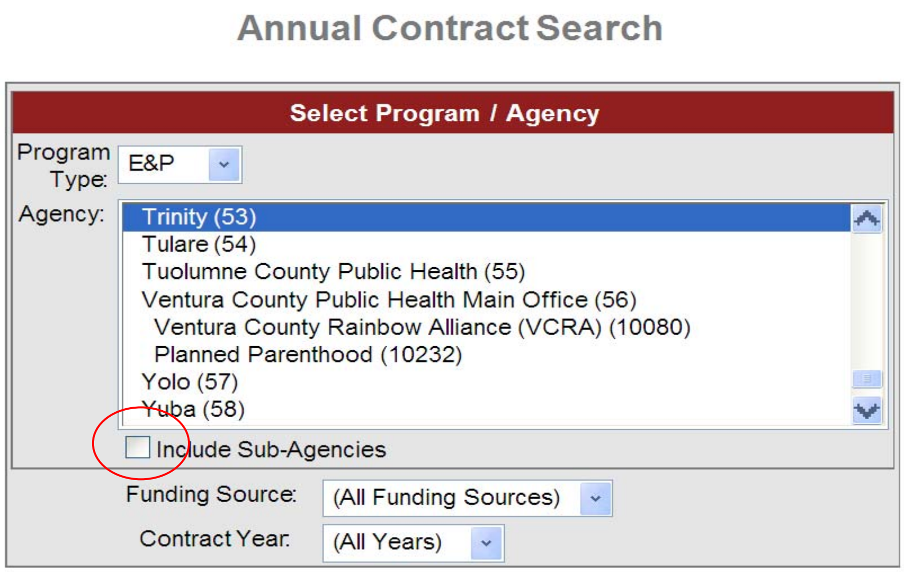
NOTE: If your LHJ does not have any sub-agencies, you may skip this step.

From the Admin Menu

To Add a New Contract

A.) From the Admin Menu, Click on Contracts

B.) Select the agency. Click the [include subagencies] checkbox to see all of your contracted agencies.



C.) The result is a table that displays contract information for each annual contract and agency in your hierarchy. See below for a description of each of the fields in the table.

MA Number	Funding Source	Agency	Contract Year	Allocation	Remaining	Interventions
07-65092	OA	Trinity	08-09	$12,373	$12,373	1

Contract Field Descriptions

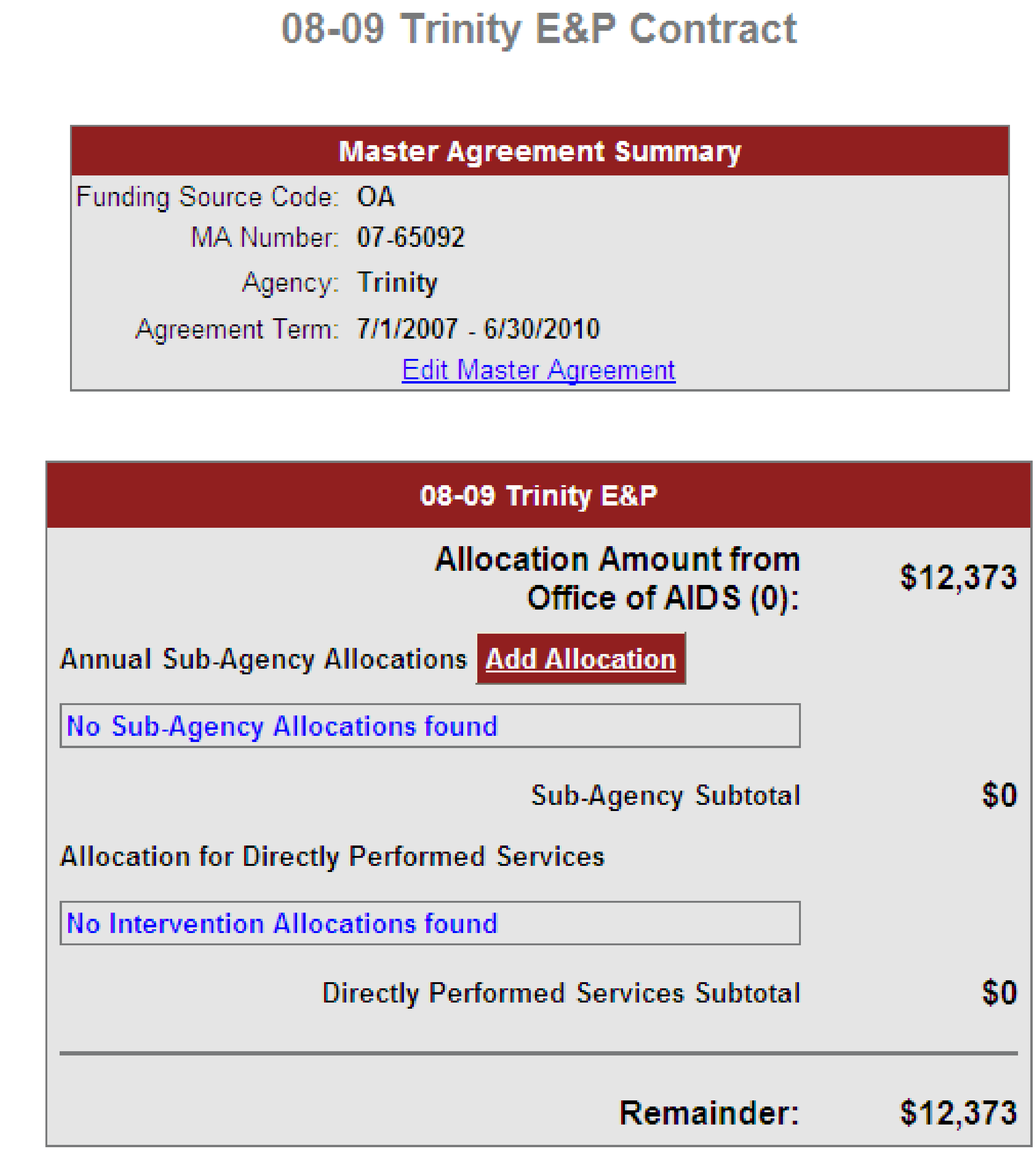
Field Name	Explanation
Contract ID	LEO automatically assignes a unique number to a contract once it has been saved in the system.
Contract Number	You may enter your own identifying number (up to 7 digits) in this optional field.
Agency	When the contract is saved, the funding agency number will automatically appear here.
Contracted Agency	Select the sub-agency from this drop-down list. (Only agencies that are set up 'below' your agency appear in this list. If the agency you're looking for does not appear here, you may still need to add it to LEO. See "Enter Agency Information" for instructions.)
Start Date	Enter the starting date for the contract or fiscal year.
Expiration Date	Enter the ending date for the contract or fiscal year.
Allocation	Enter the amount of the contract. For an actual contract, this should be the contract amount. For a non-contracted sub-agency, enter $1.
Protected Base	This field is only relevant for agencies directly funded by the Office of AIDS. Enter 0.
MOU Number	Optional: Enter an MOU number for the contract.
Closed	This check box is used to indicate that the contract has been closed.
State Fiscal Year	Select the fiscal year of the contract. If the contract spans more than one fiscal year, you may select the current fiscal year.

To Edit a Contract

A.) Click the MA Number link at the left for the contract you want to edit.

MA Number	Funding Source	Agency	Contract Year	Allocation	Remaining	Interventions
07-65092	OA	Trinity	08-09	$12,373	$12,373	1

B.) Click the dollar amount next to a sub-agency to edit the amount allocated to that agency. Select ‘open’ if this amount is final, and click save.



C.) Review the amounts in the right-hand column:

Allocation Amount	The total amount in this annual contract, allocated by the funding agency
Sub-Agency Subtotal	Total amount from this contract allocated to sub-agencies
Directly Performed Services Subtotal	Total amount from this contract spent on interventions performed by this agency. *(Intervention amounts are input from the intervention set-up screens.)*
Unallocated	Amount remaining after subtracting the above subtotals from the total allocation amount. *(Note: When all agency and intervention set-up is complete, the 'unallocated' amount should be the approximate amount that is expected to listed under indirect on your OA budget.)*

Fund a Sub-Agency from this Contract

A.) If an agency in your hierarchy must be added to a contract, this can be done from the “Contract Annual View Page” described above. Click the “add allocation” button and select the agency from the list that appears on the next page. This function is only necessary when a sub-agency receives funding from more than one source within your LHJ, since the primary funding source for an agency is designated during the ‘agency add’ process described in “Step 1: Add sub-agencies.”

08-09 Trinity E&P Contract

Master Agreement Summary	
Funding Source Code:	OA
MA Number:	07-65092
Agency:	Trinity
Agreement Term:	7/1/2007 - 6/30/2010
	Edit Master Agreement

08-09 Trinity E&P	
Allocation Amount from Office of AIDS (0):	**$12,373**
Annual Sub-Agency Allocations **Add Allocation**	
No Sub-Agency Allocations found	
Sub-Agency Subtotal	**$0**
Allocation for Directly Performed Services	
No Intervention Allocations found	
Directly Performed Services Subtotal	**$0**
Remainder:	**$12,373**

Step 3: Location Information

LEO stores information about locations relevant to the services provided, including agency addresses and service provision locations. If you've already entered your agency information, that location has already been recorded. If your agencies provide services in additional locations, you should enter those locations now.

For each service location you'll need the following information:

- Name of the location
- The physical address
- The setting type

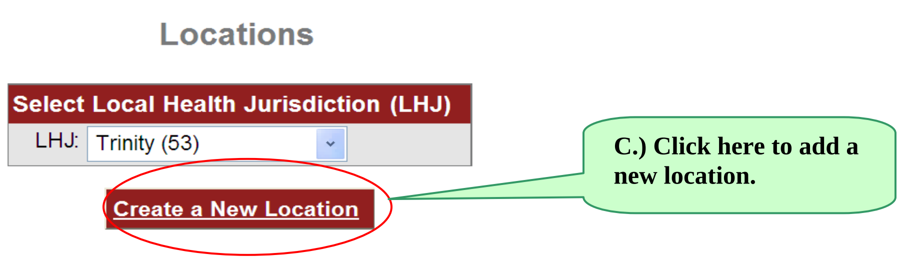
IMPORTANT: Locations in LEO are shared across different programs. For instance, if an agency performs counseling and testing at a location called Bertha's Soup Kitchen, that location should already exist in LEO and should NOT be re-entered. Instead, the existing location information will be 'connected' to as many different interventions as necessary.

From the Admin Menu

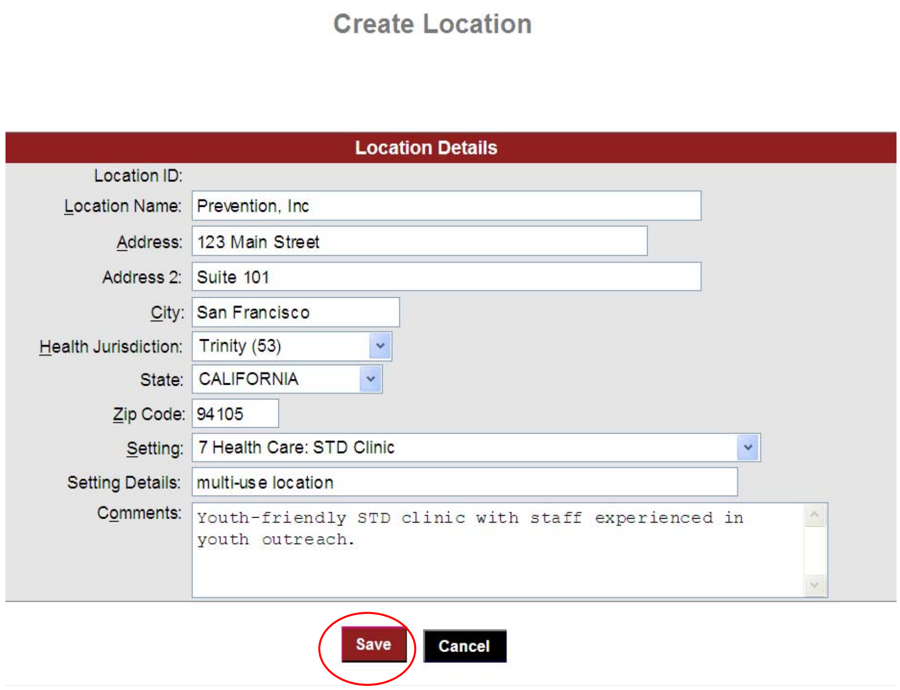
Adding a New Location to LEO

A.) Click on Locations

B.) Select your LHJ



C.) Enter all the specific location information you need to capture.



Note: you can view, and even use locations from other LHJs. However, you may not edit or add locations to other LHJs. If you provide services at a location outside of your LHJ, ask the coordinator of that LHJ to add the location, or check in with your OA program consultant.

Location Field Descriptions

Variable Name	Explanation
Location ID	LEO automatically assigns a unique number to a location once it has been saved in the system.
Location Name	Enter a name for the location that will help you remember what it is when you see it in a pull-down list. ▪ For instance, if the location is an agency, the agency name can also be the location name. ▪ If the location is a 'satellite' location where you provide services, such as a "Bertha's Soup Kitchen," name the location "Bertha's Soup Kitchen," *NOT* "Saturday Night Testing." You will be able to describe the services

Address & Address 2	Enter one or two lines of addressing information for this location. Address is required. Address 2 is optional. (See note below for special tips for defining mobile van stops and/or outreach 'areas.')
City	Enter the city for this location.
Health Jurisdiction	Your local health jurisdiction should already be selected in this drop-down box. You may not add locations to other LHJs, so if you have an agency or service location outside of your LHJ, you will need to request that that location be added by the Coordinator in that LHJ, or by OA staff.
State	California should be pre-selected in this pull down box.
Zip Code	Enter the zip code for the new location.
Setting	Select a setting type for this location. The 'setting type' for a location should reflect the primary business of the location, regardless of what services your agency performs there. For instance, if this physical location is methadone clinic, you would select "Drug and Alcohol Clinic", even though your agency may perform other services there.
Setting Details	Enter additional information describing this setting. This field is required if the setting type selected contains the word "other."
Comments	Optional: Enter any comments desired for this location. (Remember that this information is shared across programs.)

LEO Tip: **Mobile Van Stops:** Mobile van stops can be set up as 'locations' as described above when the stops are distinct and regular. For example, if a mobile van provides services outside of 'Bertha's Soup Kitchen' or another specific location, that location can be indicated as described above. But sometimes mobile van stops can be less distinct – mobile vans may provide services in a general vicinity rather than at a specific location. In these cases, you may choose to set up a location by defining an area rather than a specific address. You might identify a location as "Downtown: 3rd and Main" and define a 4-block area bordered by specific streets in the downtown area. Or you might identify a location as the "1800-2000 block of Oakmont" to indicate a mobile van stop that is more fluid.

When mobile vans provide services in a general area, or in a few different areas, get the information that you need to describe the area(s) where the vans access the targeted populations they serve in the area where the population congregates.

Step 4: Adding Intervention Information

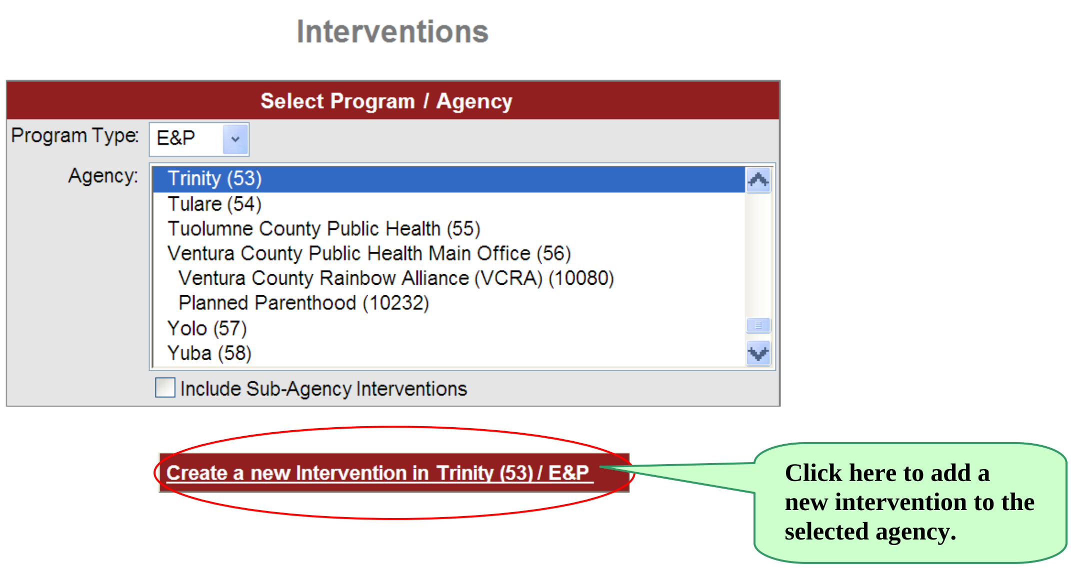
LEO pulls all of the information together in the Intervention Information section of the Admin Module. Here information is organized to indicate which agencies provide which types of services at specific locations. If you haven't already organized your information into intervention groupings using the Admin Orientation & Worksheets document, you'll need to complete that before proceeding.

From the Admin Menu

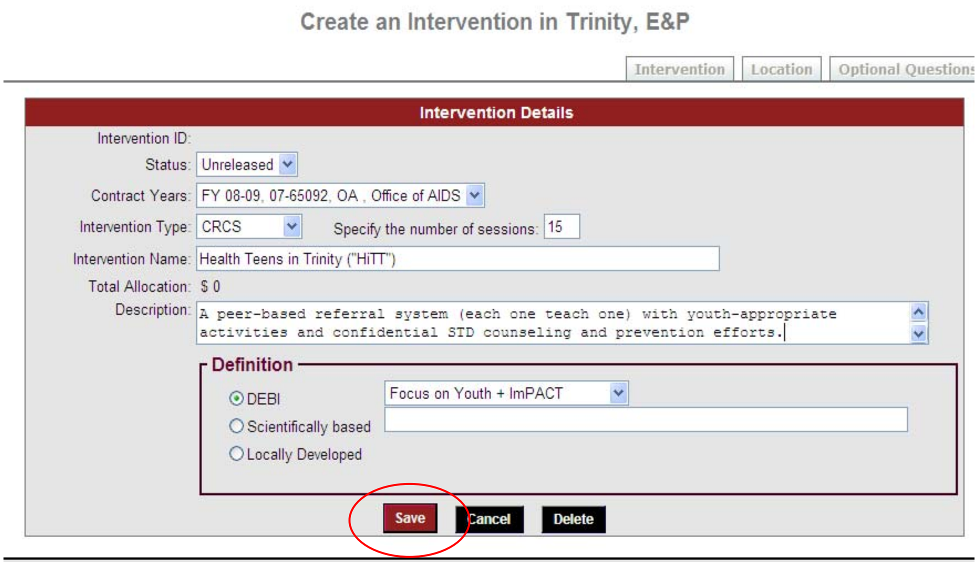
To Add Intervention Information

A.) Click on Interventions

B.) Select your Program and Agency



C.) Enter the required intervention information.



Intervention Field Descriptions

Field Name	Explanation
Intervention ID	LEO automatically assigns a unique number to each intervention once it has been saved in the system.
Intervention Status	When the intervention has been reviewed and approved, OA staff will change the status to 'open' to allow encounter data to be entered for this intervention.
Contract Years	Select the funding source/contract year for the intervention
Intervention Type	Select the intervention type from the pull down menu. Specify the number of sessions if the intervention is an ILI, CRCS or GLI.
Intervention Name	Enter the name of the intervention in the space provided. It should be something descriptive that will help you and data entry staff identify which intervention this is when you see it in a list.
Total Allocation	The total funds allocated to the intervention are a sum of the amount for each target population. These amounts are entered when entering target populations. LEO calculates the sum automatically and displays it here.
Description	You may enter a brief description of the intervention, if desired.
Definition ***(E&P only)***	Indicate what intervention this is: If it is a DEBI, click the appropriate radio button and select the name of the DEBI in the pull-down menu. If it is a Scientifically-Based intervention, select the corresponding radio button and type in a brief name/description/author of the intervention or research used in developing this intervention. If it is neither of the above, select 'Locally Developed.' Click the 'save' button to go on to define the target populations for this intervention.
ATS ***(C&T only)***	Check this box if the intervention is designated as an "Alternative Test Site."

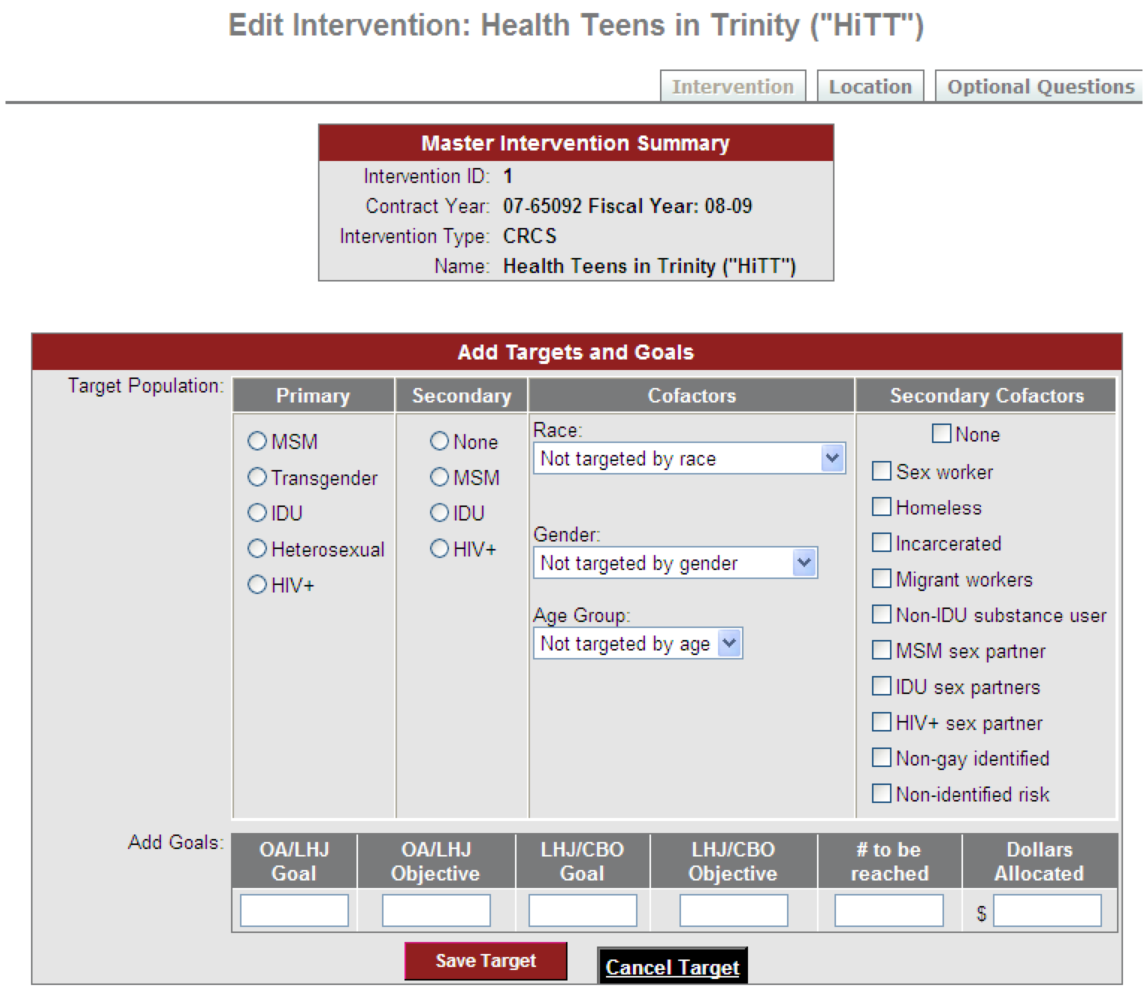
Define a Target Population

One or more target populations must be defined for each E&P intervention. This step is optional but recommended for C&T interventions. To define a target population:

A.) From within the intervention, click the [Add a Target Population] button.

An intervention may have multiple target populations, which in some cases may not be mutually exclusive – that is, a client may fit into more than one defined population. In that case, the first population entered here should be the one that you want the client to be reported in if s/he falls into more than one of your defined populations.

B.) Indicate the characteristics for the first target population from within the four columns:



NOTE: The target populations are those that you specified in Table 1 of your program narrative. Do not select new or different Target Populations unless approved by your OA Program Consultant.

Target Population Field Descriptions

Field Name	Explanation
Primary	Select an option from the 'primary' column that reflects the main characteristic of your target population. If your target population has two 'main' characteristics – such as MSM-IDU – select the option that reflects the main focal point of your intervention with this population. (E.g., does your intervention focus more on drug use, or sexual behavior?) If the primary characteristic of your target population does not appear in this column, please contact your program consultant to discuss the appropriateness of targeting your intended population.
Secondary	If your population has a secondary risk characteristic, select it in the 'secondary' column. If not, select "None."
Co-factors	Identify any demographic co-factors used to target your intended population in this column. If there are none, leave the default 'not targeted by…' selections in place.
Secondary Co-factors	Select only the co-factors that you are specifically addressing in your intervention, or select none. If 'none' is selected in this column, ALL clients who meet the criteria from the first three columns ARE included in this target population, regardless of whether they have any of the characteristics listed in this fourth column. If you want to exclude clients unless they have specific characteristics listed in this column, select those characteristics. The client must then have one or more of the characteristics selected to be included in the target population.

LEO TIP: **The factors across the four columns define ONE population.** In other words, if you select MSM in column one, IDU in column two, and Latino in column three, you are targeting "Latino MSM who are also injection drug users" not 'Latinos, MSM, and injection drug users.'

The fourth column, 'secondary co-factors' allows you to select all the factors that may apply. In the Latino MSM IDU example above, if you added in the fourth column a check in the boxes next to 'sex worker' and 'homeless' you would be targeting: Latino MSM IDUs who are also either sex workers, homeless, or both. *Note that this population definition excludes Latino MSM IDUs who are neither sex workers nor homeless.*

More than one population may be targeted within an intervention. For instance, you may be targeting African-American and Latino MSM with an intervention that addresses stigma around being gay in populations of color. This can be set up as a single intervention with two target populations: MSM African Americans, and MSM Latinos.

Be sure to contact your program consultant for help defining your target populations in LEO.

Define Your Goals & Objectives

For each target population you will also need to indicate your goals and objectives, including the number of the target population you intend to reach, and the dollar amount allocated to provide this intervention to the targeted population.

The goal and objective numbers match those in your SOW, or in the contract between you and your sub-agencies. If these fields are not relevant, you may enter a dash.

The number to be reached should match the number you stated in your budget document. The dollar allocated for each target population should be fairly accurate and the total for all interventions should match the program amount in your OA agreement.

Goals & Objectives Field Descriptions

Field Name	Explanation
OA/LHJ Goal	Enter the goal number you use as a reference with the State Office of AIDS, or enter a dash.
OA/LHJ Objective	Enter the objective number/letter you use as a reference with the State Office of AIDS, or enter a dash.
LHJ/CBO Goal	Enter the goal number from the SOW or contract developed between the LHJ and CBO. If there is no SOW or contract between the LHJ and CBO (e.g. direct service performed by the LHJ), enter a dash.
LHJ/CBO Objective	Enter the objective number/letter from the SOW you submitted to the State Office of AIDS. If there is no SOW or contract between the LHJ and CBO (e.g. direct service performed by the LHJ), enter a dash.
# to be reached	Enter the number of the targeted population you intend to provide this intervention to, which is stated in your budget documents.
Dollars Allocated	Enter the number of dollars allocated to providing this intervention to the targeted population. If you have multiple target populations in an intervention, a dollar amount is required for each target population.

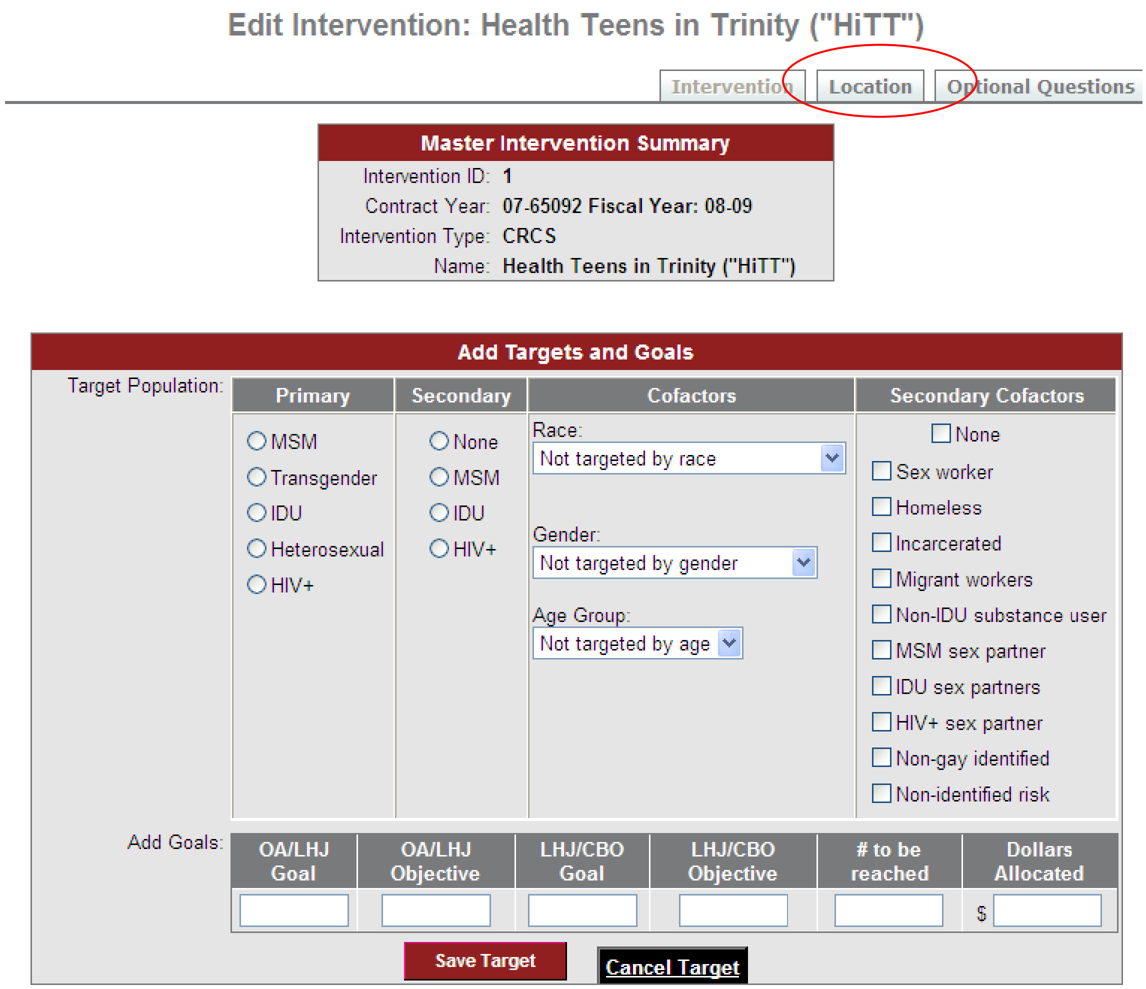
Information related to Dollars Allocated

Earlier you entered the contract award amounts to each CBO. This number is a known, precise number. As you enter the amount of dollars allocated to conducting interventions for various target populations, this may be a less precise, estimated number. Some target populations may need more resources or staff time than others, even in the same intervention. In estimating the dollar allocation, you may want to divide the allocated dollars per person intended to be reached to assess whether it is a reasonable allocation. Returning to the Contract page will show a tally of allocated dollars and unallocated dollars that remain. It is not expected that every contract dollar will be allocated to interventions and that some will be unallocated to reflect indirect costs.

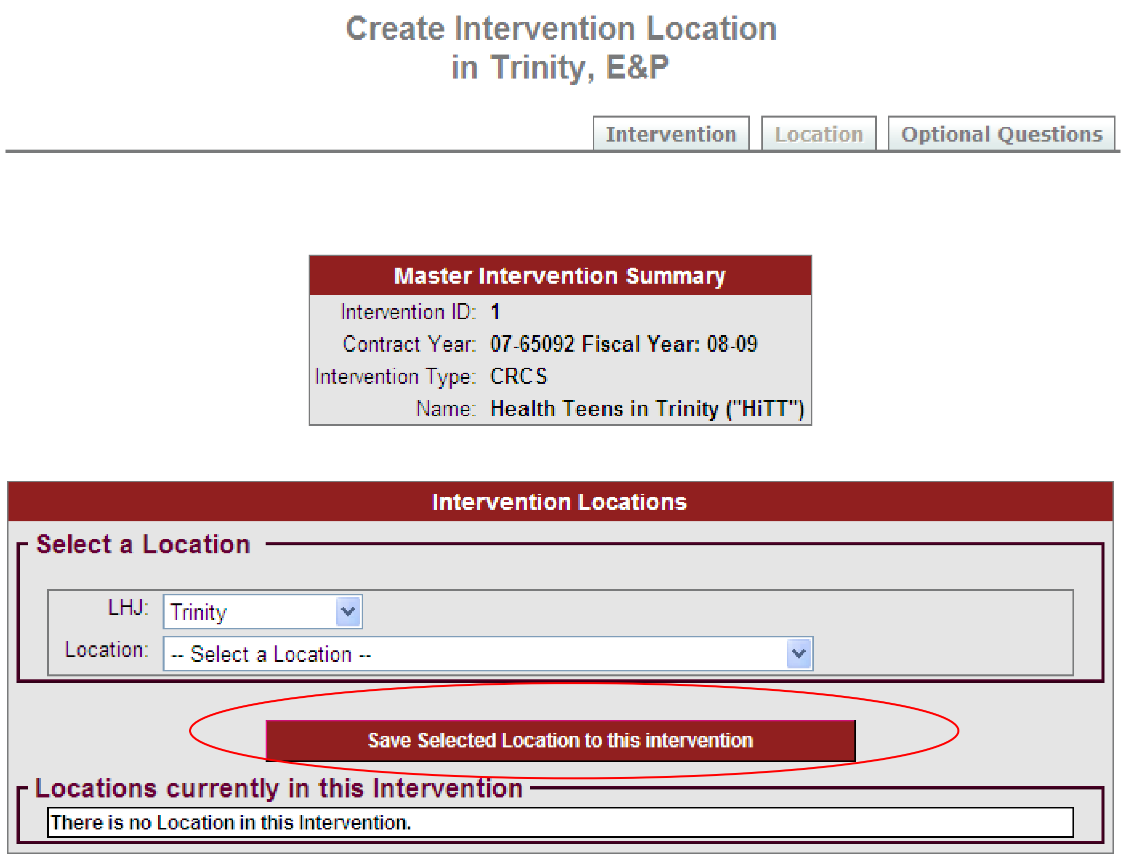
Add Location to this Intervention

Once you've completed setting up the intervention, it's time to select the locations where this intervention occurs. ***Note that the location must already be entered into LEO in order to select it during this process***.

A.) From the 'edit intervention' screen, click on the "Location" tab in the upper right-hand corner.



B.) Make sure the correct LHJ is selected in the first pull-down menu, and select the correct location from the second pull-down menu.
C.) Click the button "Save selected Location to this intervention."



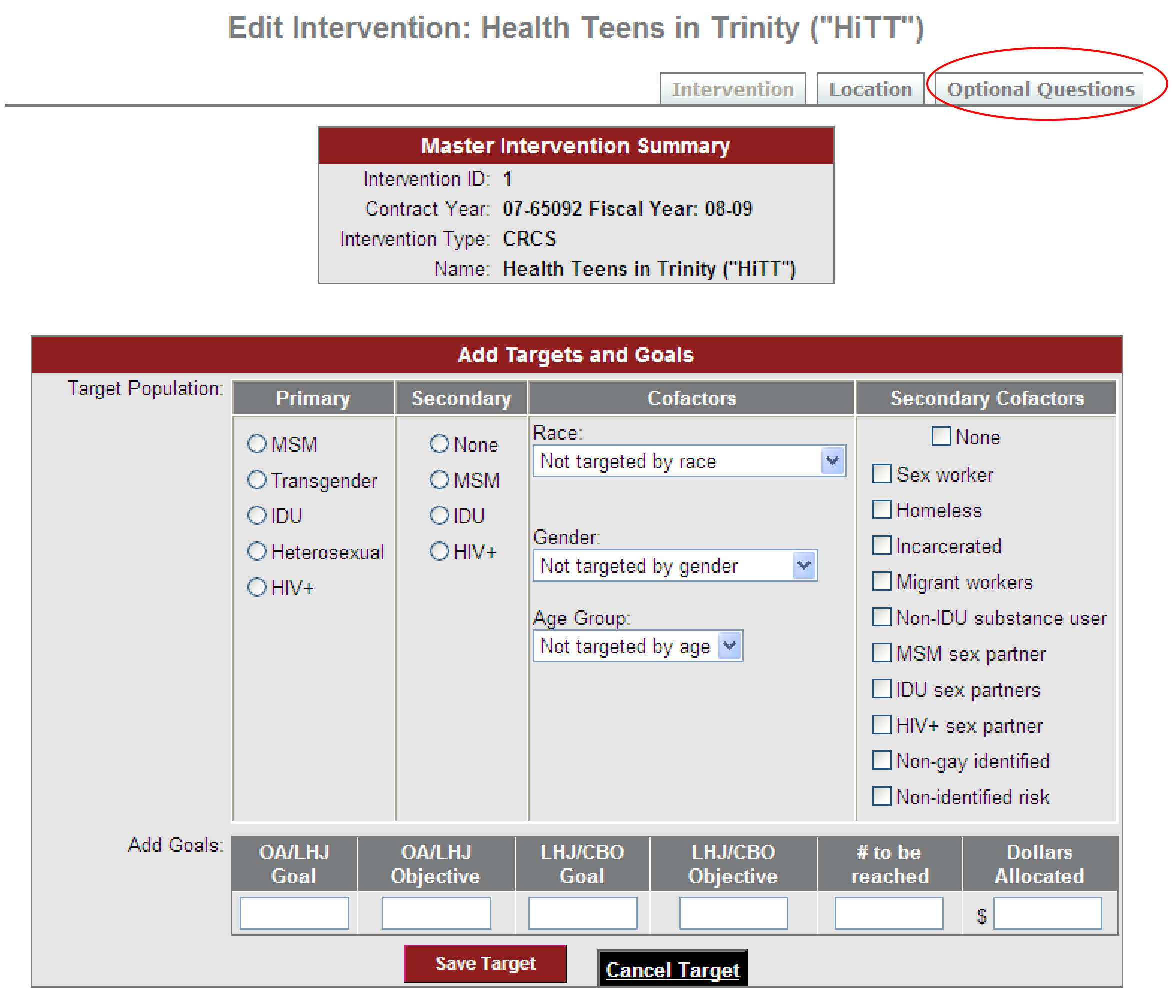
NOTE: If the intervention occurs at multiple locations, simply repeat the process above until all of the appropriate locations have been associated with this intervention.

Add Optional Questions (Optional)

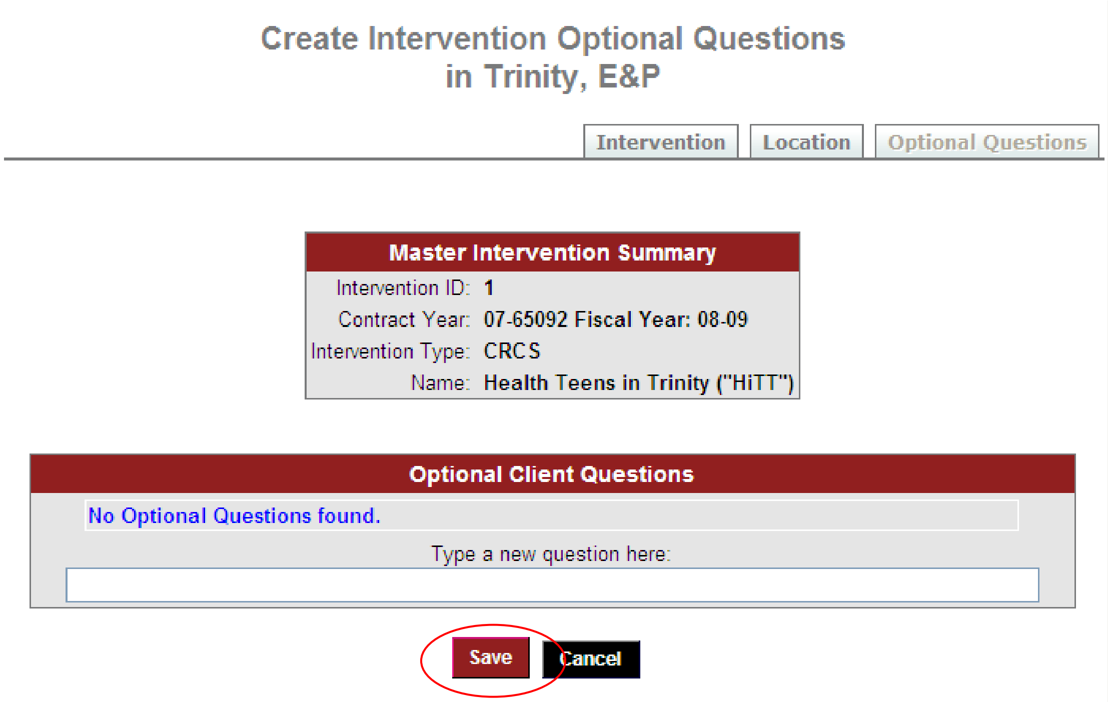
If you ask additional questions beyond what appear on the standard intervention encounter forms, you may add them in the "Optional Questions" area of intervention set up. Adding questions here allows responses to be entered for each encounter in the data entry process.

To add optional questions to an intervention:

A.) From the 'edit intervention' screen, click on the "Optional Questions" tab in the upper right-hand corner.



B.) Type your question in the field that appears.
C.) Click ‘save’ to save the question to the list.



D.) Repeat steps A - C above to add additional questions.

Tips related to Optional Questions

Responses to optional questions are “open fields” and anything can be typed in the response field. For more effective data analysis, you are encouraged to consider yes/no, percentage responses or multiple choice answers. These types of data are easier to analyze than open-ended questions.

As you enter the optional questions, you may want to type the expected responses after the question to assist data entry staff to conform to a standard set response options. For example, in the optional question field, you could type: “How did you get here today? [my car, ride with someone, bus, bike, walk, other]” to indicate the response options that may be included for this question.

Again, this will provide easier analysis of the data.

Step 5: Adding Staff Information

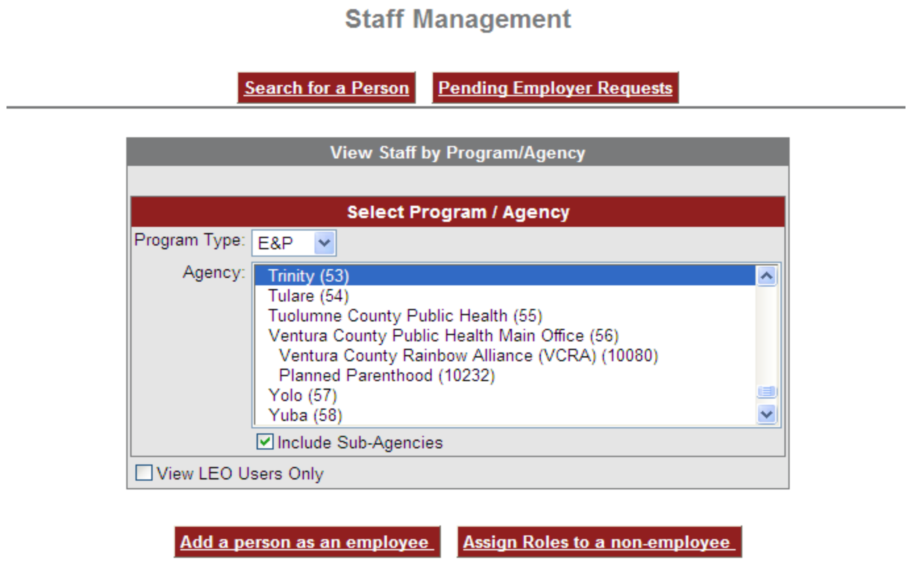
The final step in setting up your service information in LEO is to add information about the people performing services and the people who will be using LEO. Every person who will use the LEO system, or who will perform actions that will be recorded in LEO – even if they will not use the LEO system to enter or view data – must be entered into the "persons" table. For example: counselors, program coordinators, outreach workers, data entry staff, etc.

From the Admin Menu

To Search For and Add Staff

A.) Click on Staff

B.) Be sure your program and agency are selected in the box at the top



The screen displays a list of employees for that program/agency, and a list of people who are not employees who have roles in that program/agency.

Staff Information FAQs

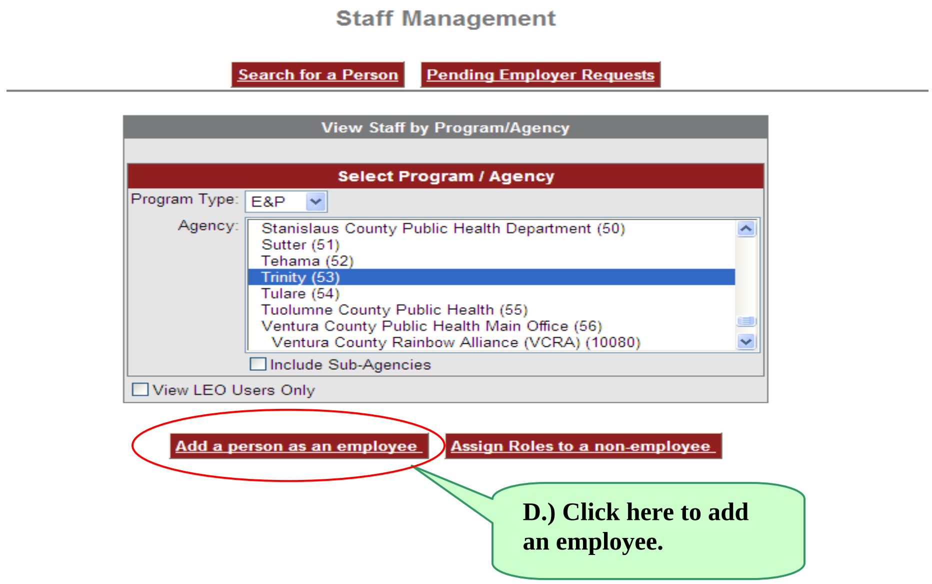
How do I decide whether to add someone as an employee vs. a non-employee that has roles?

Most of the people associated with your agency should be entered as employees – including volunteers. This allows supervisors to update staff information, view training data, and receive notifications and other information regarding these staff members. A non-employee who has roles in your agency may be someone who works for another agency, but enters data for your interventions, or from time to time helps fill in to provide client services in your agency, but for whom you are NOT responsible. If you need help determining whether a person is an employee or not, contact your program consultant.

To Add an Employee

A.) Make sure your program/agency are selected

B.) Click on the [add a person as an employee] Button



C.) Type all or part of a name in the box and click "Add Employee"

LEO searches the list of existing people and provides you with matches to select from.

Request an Employee – more info

To add a person who already exists in LEO as an employee to your agency, you must either already have permission to access their information, or you must request it from their current employer or OA. The idea is to protect staff information in LEO so that it is available only to people who should have access to it, such as supervisors/employers and funding agencies.

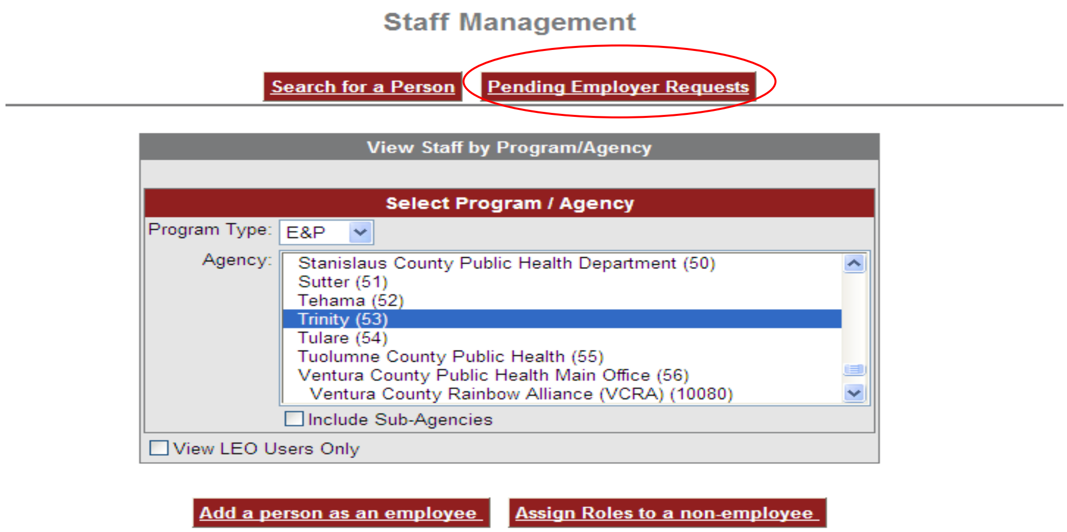
If a person is an employee of one of your agencies or sub-agencies, you will be able to simply add them as an employee to another of your agencies.

If you do not currently have permission to access an existing person's information, you will be able to 'send a request' to their current employer (for instance, if they also work for another program/agency with a different supervisor) in order to add them as an employee to your agency. Once that request is approved, LEO will automatically add that person to your agency as an employee, and you will have access to their staff information.

Note that LEO does not generate an e-mail request, so you will want to notify the supervisor that they have a pending request to respond to. [See below for more info].

View Pending Employer Requests

A.) To view pending employer requests, from the "Staff Management" page click the "Pending Employer Requests" button.



On the next screen is summarized the list of employees that have been requested from you by other agencies, and those you have requested from other agencies. Once a request has been responded to, it no longer appears on this screen.

Remember that LEO does NOT send a separate notification that requests are pending, so if you are waiting for an agency to release a staff member to you, you may want to call or e-mail the coordinator/supervisor of the agency in question to let them know that you have made a request.

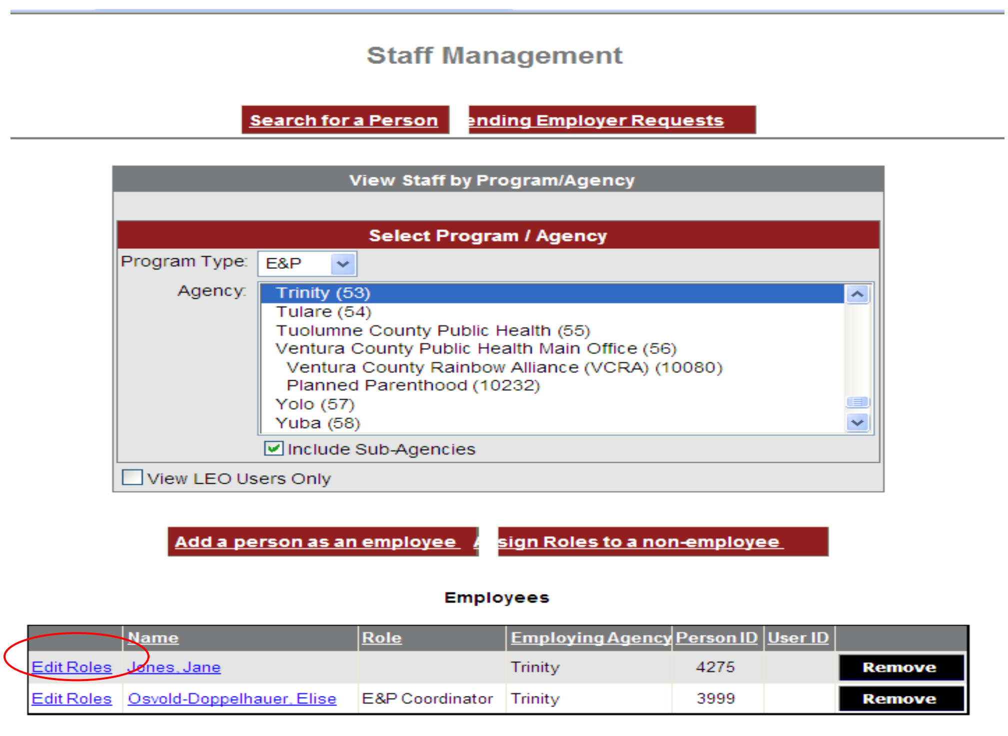
Respond to a Pending Employer Request

As an employer, you may from time to time receive requests from other program coordinators or supervisors for permission to add one of your employees to their agency. Granting permission is as simple as clicking the 'approve' button on the "Pending Employee Request" page. However, this releases the information about the staff member to the requestor, so be sure the request is legitimate before granting approval. Contact your program consultant if you have any questions about this process.

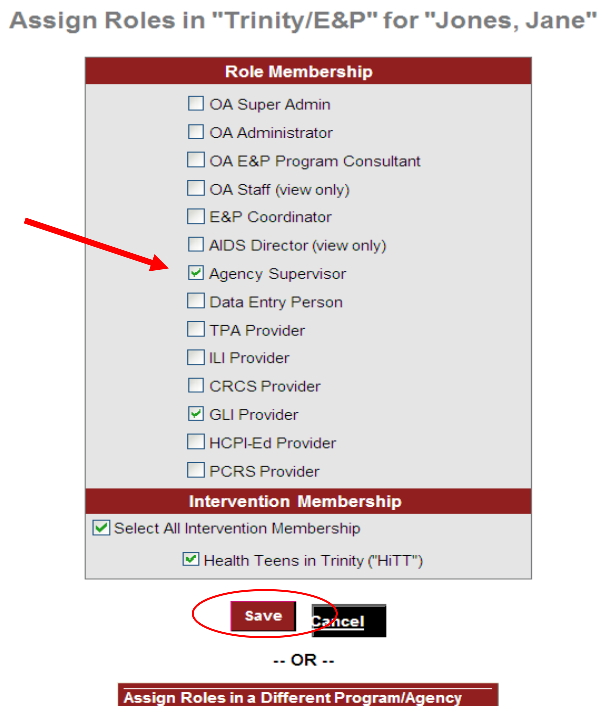
To Assign Roles to an Employee

In order for a person to do anything in LEO, or to even be entered as a provider of client services on encounter forms, they must have the appropriate permissions in LEO. The permissions are controlled by the roles and interventions assigned to the person.

A.) From the Staff Management page, click the 'edit roles' link next to the appropriate staff member.



B.) Place a check mark next to the role(s) that the person plays in the agency, and next to each intervention that the person is involved in.
C.) Click "Save."



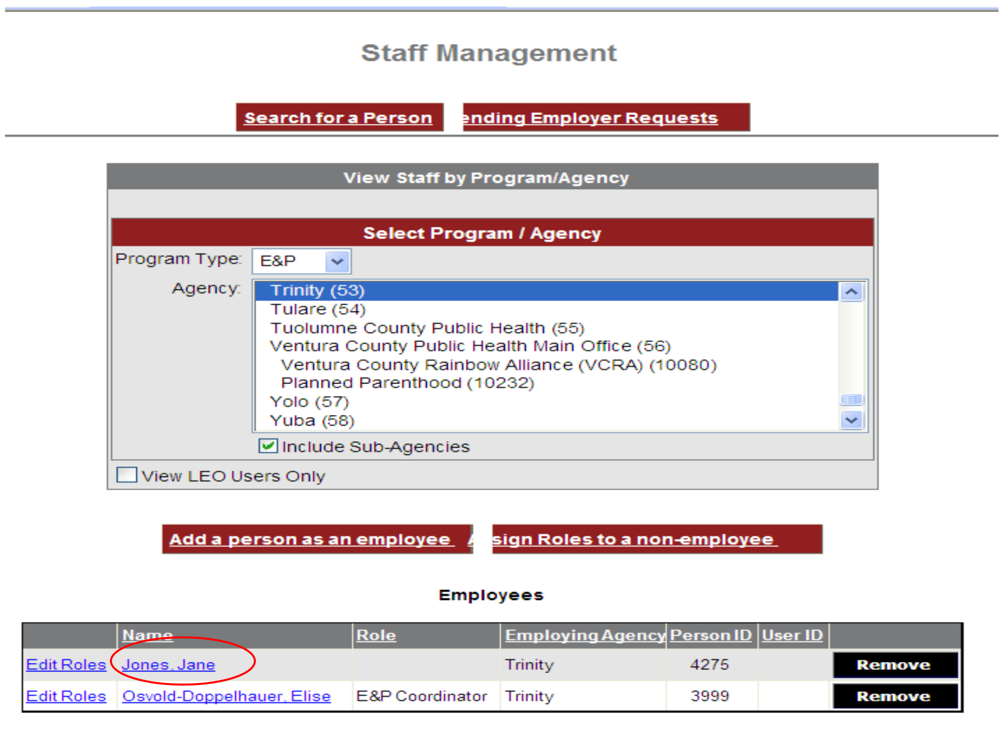
To Assign Roles to non-employee

If an employee of another agency performs roles in your agency from time to time, you can give them permission to perform that role without adding them as an employee. For example, if the health department data entry clerk enters data for one or more of your interventions, they can be granted data entry permissions and access to the appropriate interventions in your agency. Similarly, if a provider – a test kit operator (C&T) or a case manager (E&P) from another agency occasionally 'fills in' for one or more of your interventions, you'll need to grant them appropriate permissions for that role and intervention in your agency. You can do this from the Staff Management page by clicking the "Add Roles to Non-employee" button and following the directions. *Note that the person must already be in LEO to grant them permissions as a non-employee*.

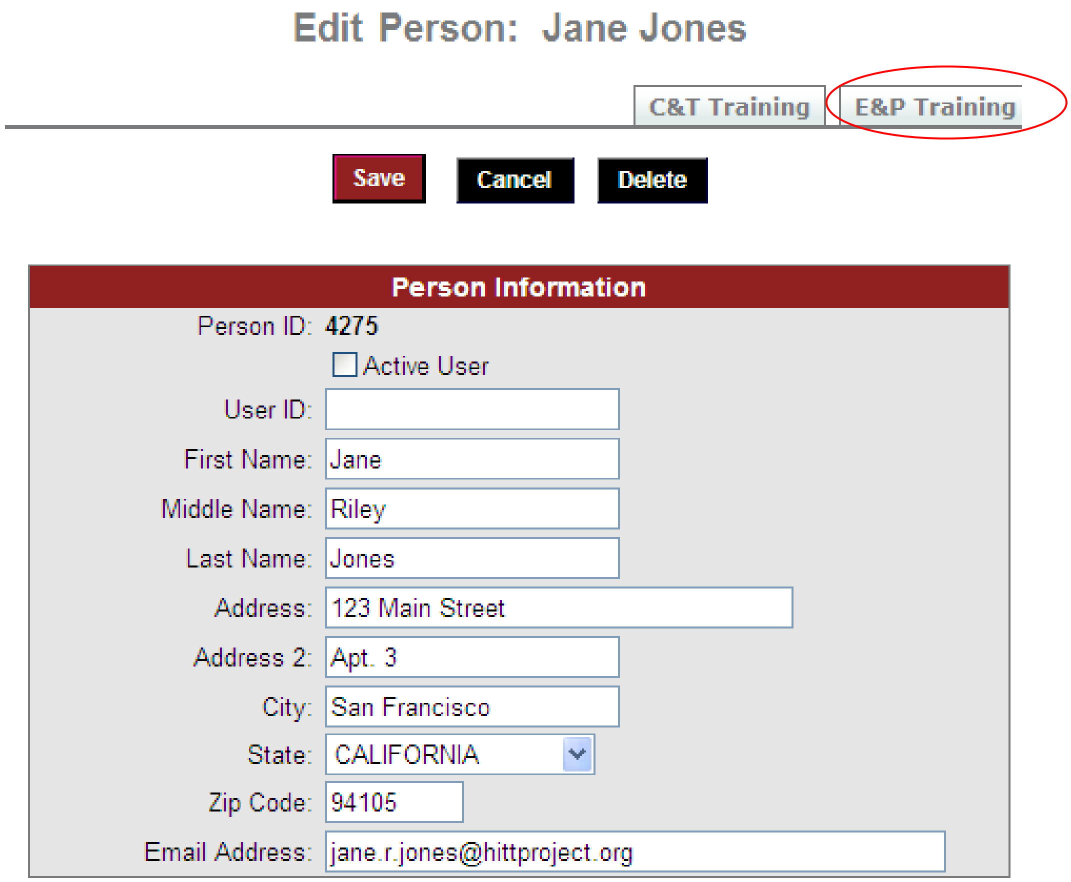
To Add Training Information

LEO can also track training information related to specific staff members. Future planned functionality includes the ability to generate reports regarding the training history and services provided by staff members to improve training schedules and verify that services are being provided by qualified staff members.

A.) From the Staff Management page, click on the name of the staff member.

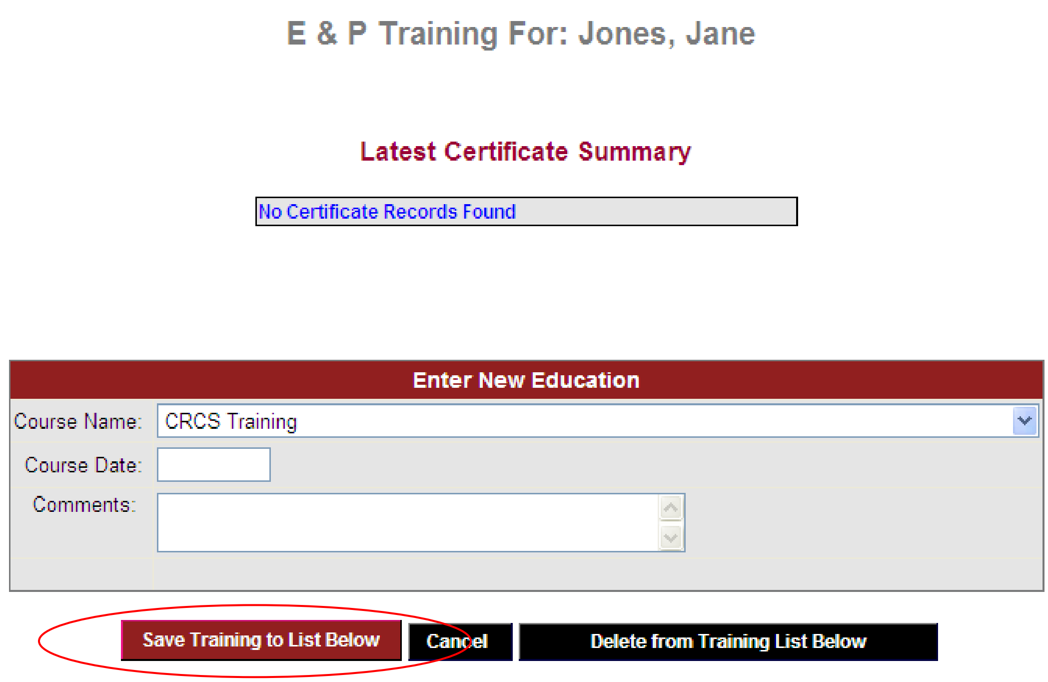


B.) On the next screen, click on the appropriate "training" tab in the upper right hand corner.



C.) On the training screen, click the “add new training” button.

D.) Select the appropriate training from the list, enter the date of the training, and add comments if desired. Click ‘save training to list below.’



NOTE: To add additional trainings, repeat steps C-E above.

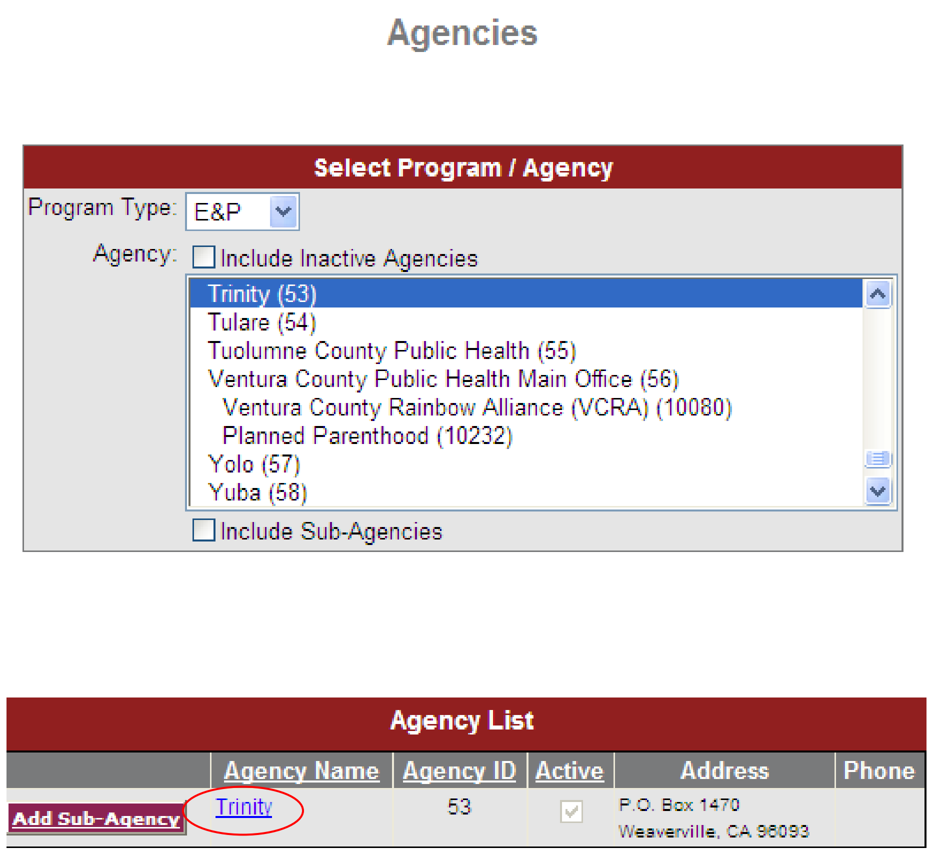
Once staff information has been completed, you can return to the agency screen to enter Agency Contact Persons.

To Add Agency Contact Persons

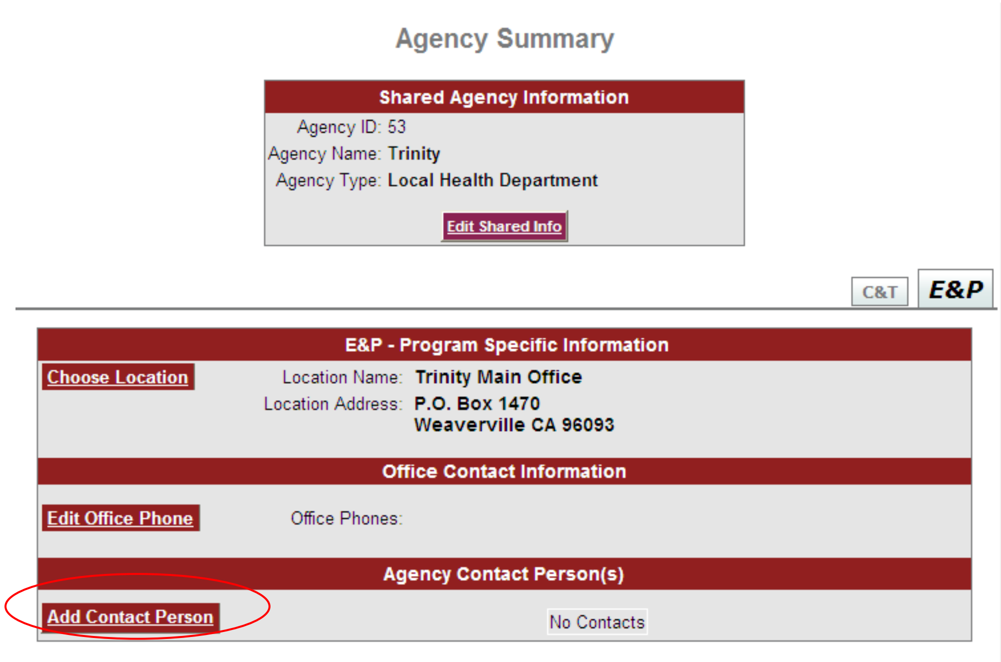
In the final set-up step, you will return to the agency screens to associate contact people with your agency/ies.

A.) Select "Admin Menu" and then "Agencies"

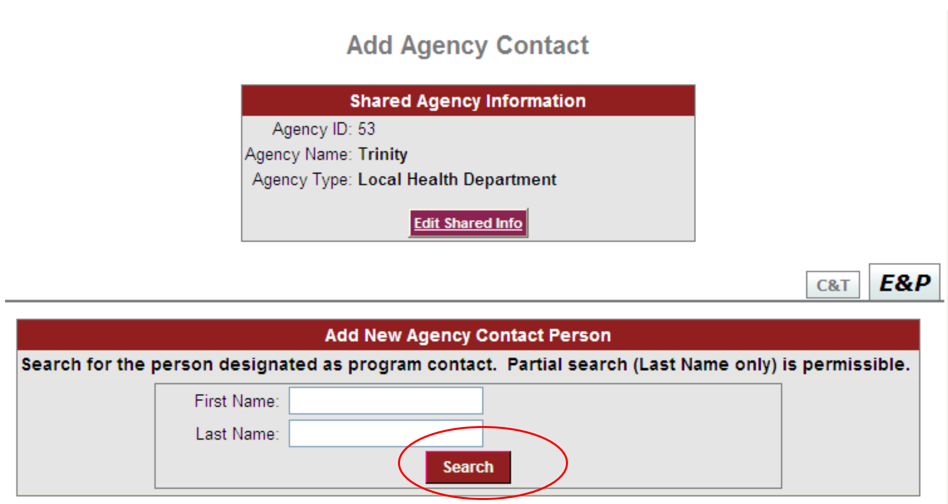
B.) Click on your agency name in the table to edit agency information.



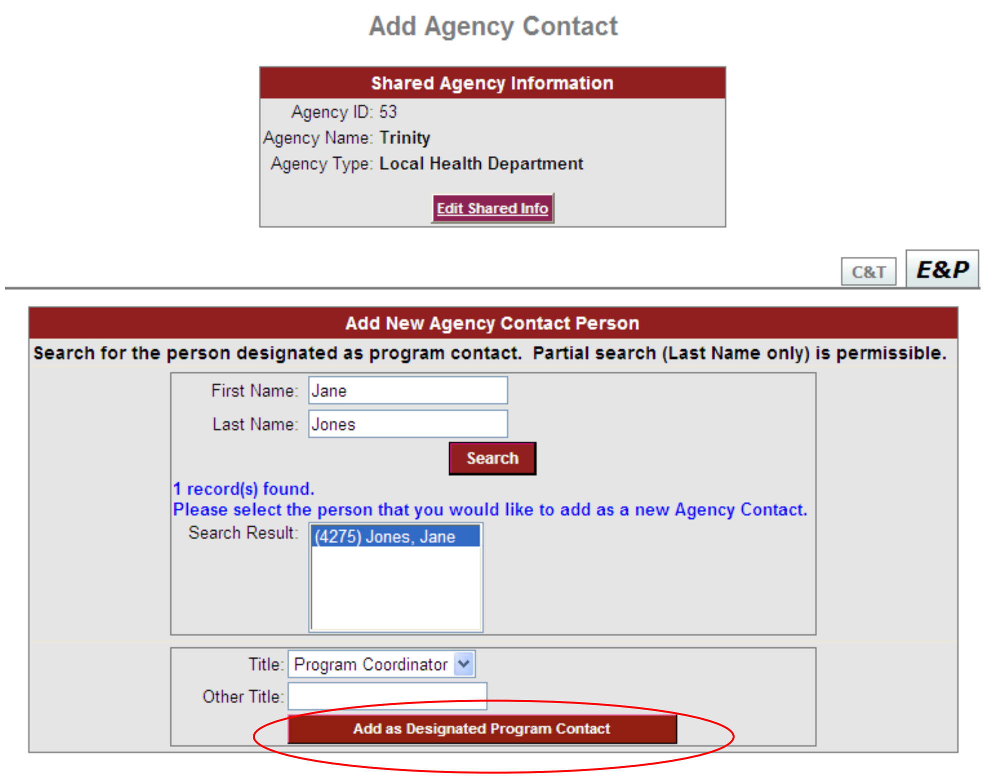
C.) Click the “Add Contact Person” button



D.) Type in part of the contact person’s name and click ‘search’



E.) Select the correct contact person from the resulting list.
F.) Select a title for the person in the pull down menu, or type in a custom title in the "other title" box. (Select or enter a title that will help clarify what areas of responsibility this person has for the purposes of outside contact. For instance, if this is the person to contact for data entry questions, select "Data Entry Person.")
G.) Click "add as designated program contact."



H.) To add additional persons as contacts for this agency, repeat steps C – G above.

Note that this person's contact information will now appear on the agency page. If this person's information is updated on the "Staff" pages, that information will automatically be updated here.

Administrative set-up is now complete. Please remember to revisit this information to update it as circumstances change.