LEO Update for C&T Coordinators – 28 March 2008

Along with the rollout of the LEO C&T module, some Administrative Module features have been integrated or enhanced. This document is intended to update C&T Coordinators about LEO status and important changes that have occurred since the Admin Module training.

Executive Summary

- C&T data entry module has been released, and trainings are under way. Please make plans for data entry staff to attend a training.
- Intervention set-up must be approved by OA before the intervention is 'released' for entry of client data. Contact Mary Geary to request review when your admin module set up is complete.
- LEO staff pages (in the Administrative Module) include a new tab structure, including tabs for User Information and Course (Training) History.
- C&T coordinators must assign data entry staff to appropriate roles <u>and interventions</u> within LEO before they will be able to enter data. This is done from the Staff – User Information tab.
- Invoicing will roll out next. The interface will be simple and intuitive, so no trainings will be scheduled. An information sheet similar to this one will be provided to explain invoicing functionality, and technical assistance will be available to those who request it.
- C&T coordinators must update counseling staff training information prior to invoicing for the first time in order to be reimbursed properly. This is done from the Staff – Course History tab.

LEO Status

On 18 March 2008, the C&T Data Entry Module was rolled out to LEO production, and trainings began. If you have not yet signed data entry staff up for training on this module, please contact Robert Crook at Robert.crook@cdph.ca.gov or (916) 324-6513.

All C&T Coordinators should now have access to LEO, and should be completing administrative information in preparation for C&T data entry. If you have not yet received a LEO User ID, or if you are having problems accessing LEO, please contact Jen Rohde at Jennifer.Rohde@cdph.ca.gov or (916) 341-6234.

Entering Data into LEO

LEO interventions, including all C&T interventions, must be approved by OA before the intervention is 'released,' allowing client data to be entered. This is to help ensure that administrative information, including agencies, locations, and interventions have been set up in an optimal way for reporting and data integrity. If you have completed your administrative set up, please contact Mary Geary to request a review at Mary.Geary@cdph.ca.gov or (916) 449-5804. If you have any questions about how to complete your admin information, please see the Quick Start Guide and/or the Admin Module worksheet available at www.dhs.ca.gov/aids/Counseling/LEO under LEO Resources or contact Mary Geary for technical assistance.

Staff must be assigned to appropriate roles and interventions before they can begin data entry. On the LEO Staff pages, there is a new 3-tab structure: the "Person" tab contains name and contact information; the "User Information" tab contains LEO user information, such as the LEO User ID, Role Membership, and Intervention Access; and the "Course History" tab contains information about trainings completed by this staff member. Follow the steps below to update data entry staff in LEO to enable them to enter C&T data:

Assigning Roles and Interventions: Admin – Staff – User Information Tab

What is User Information?

User Information includes a LEO User ID, information about "Roles" the staff member performs within LEO (such as data entry, or C&T coordinator), and which interventions the staff member has access to. User Information is only required for staff members who need to access LEO to enter data or generate reports. Not all staff members will be LEO users. For instance, a counselor must be listed in LEO as a staff member in order to track training and counseling activities, but may or may not be a LEO user. A staff member who does NOT access LEO has no information on the "User Information" tab.

To Edit User Information

1. Go to the Staff pages from the LEO Admin menu.
2. Select a staff member to edit.
3. In the upper right corner, click the User Information tab.
4. Edit information as desired, and click Save.

User Information Fields

Field Name	Explanation
"This Person is a LEO system user"	This box should be checked if this staff member needs to access the LEO system to enter data or generate reports.
User ID	This box contains the LEO User ID generated by the Office of AIDS. The staff member must use this ID and a secret password to access the LEO system. <u>This field cannot be changed</u> or the person will no longer be able to login to LEO.
Role Membership checkboxes	This series of checkboxes is used to assign LEO permissions to staff members according to the role they perform. For instance, the 'data entry person' box should be checked for a staff member who is required to enter client data for specified interventions.
Intervention	This series of checkboxes is used to allow access to

Data Entry Access	specific interventions. For instance, a data entry person must have a checkbox next to any interventions for which they will enter data. A Counseling and Testing Coordinator automatically has access to all C&T interventions.

LEO Invoicing Module

The LEO Invoicing Module will roll out next. The process for generating an invoice will consist of a few simple steps to generate a preview invoice, examine the automatic reports that are created to ensure that you are ready to finalize the invoice, and then to finalize and print the invoice. The finalized invoices should be signed and sent to OA as usual.

Because the interface is intended to be simple and self-explanatory, no trainings are planned for invoicing rollout. However, an information sheet similar to this one will be provided, and technical assistance will be available if needed.

Before invoicing, it will be necessary to update Course (Training) History for your counselors in LEO in order to be paid for all qualified services. This information may be updated at any time between now and generating your first LEO invoice. Follow the steps below to update Counselor Course History in LEO.

Updating Counselor Training: Admin – Staff – Course History Tab

Course History Tab explanation	The Course History tab contains information about trainings completed and skills attained relevant to OA-funded services. In a subsequent release of LEO, this information will be updated automatically via the training module as trainings are completed and training outcomes are recorded. For now, however, this information may be edited by C&T Coordinators to ensure that training history and skill certifications are up-to-date in LEO. There are three sections on the Course History tab: Latest Certificate Summary, Add New Education Data, and Education List.
Latest Certificate Summary	In this section, the staff member's 'certificates' are summarized, along with their expiration date. For example, a person who has completed the Counselor 2 Basic 1 and Basic 2 is 'certified' as a Counselor 2. The certification for that skill expires one year after the Basic 2 date. The certification is automatically extended for an additional one year period when a CET is recorded for that staff member.
Add New Education Data	In this section, a new training course can be added for the staff member by completing the steps below: 1. Select the course name from the pull-down menu.

2. Enter the date corresponding to the first day of the course.
3. Add comments if desired.
4. Click “Save Education to List Below.’

Education List	The staff member’s training history is listed in this section, with the most recent training course at the top. The skills earned (e.g., Counselor 1, Counselor 2, Rapid Test Kit operation, etc.) are listed in a box to the right. New courses added via the “Add New Education Data” are added to this list, and “Latest Certificate Summary” information is updated according to the dates and skills that appear in this list.
Adding Rapid Test Certification	*Note that currently, you must add Rapid Testing Certifications separately from Counselor Training. For instance, if you add a “Counselor 2 Basic 1” course for a staff member who successfully completed both the counselor certification and the rapid test certification, you will need to add both the Basic 2 course, and the Rapid Test Training to the Education List in order to add the correct skill certifications to that staff member. This will be simplified in a future version of LEO.*

The LEO usage information in this document will be added into the next version of the LEO Quick Start Guide, which can be found on the LEO Login page: www.dhs.ca.gov/aids/Counseling/LEO.