SECTION 1300

LEGAL SERVICES

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SECTION 1300: LEGAL SERVICES

1301: Introduction

Legal Service providers will <u>only</u> be required to enter client demographics and service units through the **Client/Unit Bulk Data** process for the following services:

1. **Legal Assistance**;
2. **Caregiver Legal Fund**; and,
3. **GRG Legal Fund**.

1302: Legal Assistance

1. In ClientTracker, click on the **Enter Units/Bulk Data** tab.

2. The **Enter Units by Person** page will appear.

3. In the **Unit Entry Options** dialogue box, click on the green link <u>**Client/Unit Bulk Data**</u>.

4. The **Enter Bulk Data** page will appear. In the **Bulk Data Entry Options** dialogue box, choose the parameters (**Month Performed, Site,** and **Service**).

   $ **Month Performed**: select the month by using the drop down menu. (Enter quarterly data in the last month of that quarter. For example,

3rd quarter (April-June) data will be entered under the month of June.)

$ **Site**: select the site by using the drop down menu. (Enter quarterly data for **Legal Assistance** per site/county.)

$ **Service**: select **Legal Assistance** by using the drop down menu.

You can enter data as long as the time period selected is during the current quarter. If you select a time period that has been closed to data entry, the following message will appear, A**The data entry date you selected is for a quarter that has already been closed. Please select a different data entry date or contact ECIAAA for an extension if necessary.**@

5. Click on the **Go!** button.

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6. Below the **Bulk Data Entry Options** dialogue box, the following dialogue boxes will appear:

$ **Enter Bulk Clients Demographics Below** and
$ **Enter Bulk Units Below**

<u>Enter Bulk Clients Demographics Below</u>

a. Enter appropriate data in each of the individual demographic categories per quarter, per site/county and per service. <u>Remember to only enter the total number of **new** clients during that particular quarter.</u> Do not use YTD data. Race, Rural/Urban, and Sex

<div align="right">Updated: 12/2007</div>

demographics must match the number of clients entered in the **Total Clients:** content box. Documentation supporting the data entered needs to be maintained at the service provider level.

    b.   Click on the **Save Bulk Demographics** tab.

    c.   You will receive the following message, A**Bulk Data Save Completed Successfully!**@

Enter Bulk Units Below

    a.   Enter service units in the **Units:** content box. Remember to only enter the total number of **new** service units during that particular quarter. Do not use YTD data. Documentation supporting the data entered needs to be maintained at the service provider level.

    b.   Click on the **Save Bulk Units** tab.

    c.   You will receive the following message, A**Bulk Data Save Completed Successfully!**@

7.   Repeat steps 4 through 6 for all of the sites/counties for Legal Assistance.

8.   Once the Legal Assistance quarterly data has been entered per site/county, you will need to compare your internal YTD totals with ClientTracker YTD totals. In order to do this comparison, see **Section 1400 - Quarterly ClientTracker Procedures** for **Legal Services.**

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1303:   <u>Caregiver Legal Fund</u>

1. In ClientTracker, click on the **Enter Units/Bulk Data** tab.

2. The **Enter Units by Person** page will appear.

3. In the **Unit Entry Options** dialogue box, click on the green link <u>**Client/Unit Bulk Data**</u>.

4. The **Enter Bulk Data** page will appear. In the **Bulk Data Entry Options** dialogue box, choose the parameters (**Month Performed, Site,** and **Service**).

   $ **Month Performed:** select the month by using the drop down menu. (Enter quarterly data in the last month of that quarter. For example, 3rd quarter (April-June) data will be entered under the month of June.)

   $ **Site:** select the site by using the drop down menu. (Enter quarterly data for **Caregiver Legal Fund** per site/county.)

   $ **Service:** select **Caregiver Legal Fund** by using the drop down menu.

You can enter data as long as the time period selected is during the current quarter. If you select a time period that has been closed to data entry, the following message will appear, A**The data entry date you selected is for a quarter that has already been closed. Please select a different data entry date or contact ECIAAA for an extension if necessary.**@

5.   Click on the **Go!** button.

6.   Below the **Bulk Data Entry Options** dialogue box, the following dialogue
        boxes will appear:

        $ **Enter Bulk Clients Demographics Below** and
        $ **Enter Bulk Units Below**

Enter Bulk Clients Demographics Below

        a. Enter appropriate data in each of the individual demographic categories
            per quarter, per site/county and per service. Remember to only enter
            the total number of **new** clients during that particular quarter. Do not use
            YTD data. Race, Rural/Urban, and Sex

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            demographics must match the number of clients entered in the **Total
            Clients:** content box.

            Documentation supporting the data entered needs to be maintained at
            the service provider level.

        b.   Click on the **Save Bulk Demographics** tab.

        c.   You will receive the following message, A**Bulk Data Save Completed
                Successfully!**@

Enter Bulk Units Below

        a.   Enter service units in the **Units:** content box. Remember to only
                enter the total number of **new** service units during that particular

quarter. Do not use YTD data. Documentation supporting the data entered needs to be maintained at the service provider level.

b.   Click on the **Save Bulk Units** tab.

c.   You will receive the following message, A**Bulk Data Save Completed Successfully!**@

7.   Repeat steps 4 through 6 for all of the sites/counties for Caregiver Legal Fund.

8.   Once the Caregiver Legal Fund quarterly data has been entered per site/county, you will need to compare your internal YTD totals with ClientTracker YTD totals. In order to do this comparison, see **Section 1500 - Quarterly ClientTracker Procedures** for **Legal Services**.

1304:   GRG Legal Fund

1.   In ClientTracker, click on the **Enter Units/Bulk Data** tab.

2.   The **Enter Units by Person** page will appear.

3.   In the **Unit Entry Options** dialogue box, click on the green link **Client/Unit Bulk Data**.

4.   The **Enter Bulk Data** page will appear.   In the **Bulk Data Entry Options** dialogue box, choose the parameters (**Month Performed, Site,** and **Service**).

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$ **Month Performed**: select the month by using the drop down menu. (Enter quarterly data in the last month of that quarter. For example, 3rd quarter (April-June) data will be entered under the month of June.)

$ **Site**: select the site by using the drop down menu. (Enter quarterly data for **GRG Legal Fund** per site/county.)

$ **Service**: select **GRG Legal Fund** by using the drop down menu.

You can enter data as long as the time period selected is during the current quarter. If you select a time period that has been closed to data entry, the following message will appear, A**The data entry date you selected is for a quarter that has already been closed. Please select a different data entry date or contact ECIAAA for an extension if necessary.**@

5.   Click on the **Go!** button.

6.   Below the **Bulk Data Entry Options** dialogue box, the following dialogue boxes will appear:

$ **Enter Bulk Clients Demographics Below** and
$ **Enter Bulk Units Below**

Enter Bulk Clients Demographics Below

a.   Enter appropriate data in each of the individual demographic categories per quarter, per site/county and per service. Remember to only enter the total number of **new** clients during that particular

quarter. Do not use YTD data. Race, Rural/Urban, and Sex demographics must match the number of clients entered in the **Total Clients:** content box.

Documentation supporting the data entered needs to be maintained at the service provider level.

b.   Click on the **Save Bulk Demographics** tab.

c.   You will receive the following message, Α**Bulk Data Save Completed Successfully!**@

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Enter Bulk Units Below

a.   Enter service units in the **Units:** content box. Remember to only enter the total number of **new** service units during that particular quarter. Do not use YTD data. Documentation supporting the data entered needs to be maintained at the service provider level.

b.   Click on the **Save Bulk Units** tab.

c.   You will receive the following message, Α**Bulk Data Save Completed Successfully!**@

7.   Repeat steps 4 through 6 for all of the sites/counties for GRG Legal Fund.

8.   Once the GRG Legal Fund quarterly data has been entered per site/county, you will need to compare your internal YTD totals with what ClientTracker YTD totals. In order to do this comparison, see **Section 1400 - Quarterly ClientTracker Procedures** for **Legal Services**.