LaMPSS Case Training

March 2011

Welcome to EAS Case Training. This classroom session is being offered to case management staff that will interact directly with the case management lifecycle in LaMPSS.

This session will expand upon what you have already learned about case management during the introduction to EAS case management in November and as a part of LaMPSS Fundamentals last month.

Over the course of the next two days, you will have the opportunity to work hands-on with the LaMPSS solution and learn how to use LaMPSS as a workflow application.

Agenda

- ➤ Welcome & Objectives
- ➤ LaMPSS Refresher
- ➤ Case Management Lifecycle
  - ❑ Intake
  - ❑ Assessment
  - ❑ RTWAP Development
- ➤ Enhanced Services
- ➤ Case Management Lifecycle
  - ❑ RTWAP Management
  - ❑ Follow Up
- ➤ Next Steps
- ➤ Conclusion & Wrap Up

<Welcome participants and introduce yourself>

The agenda for this session is seen on this slide

<Outline agenda items>.

Welcome

➤ Introductions
➤ Logistics
  ❑ Washrooms
  ❑ Cell phones/Blackberries
  ❑ Breaks
  ❑ Lunch

Ask people to introduce themselves or a partner. Ask for the following information:

-Name

-Organization /Role

-Expectations for the day

Use a flip chart to capture any expectations you are given.

Speak to general housekeeping items:

-Know your room and indicate where washrooms are

-Request that blackberries or other devices be put on silent and if possible, ask participants wait until breaks to check messages

-Breaks are not scheduled, but we will break once in the morning, again for lunch, and once in the afternoon. The timing of breaks is flexible

Introduce the concept of a "parking lot" for issues or questions that cannot be answered during training (out of scope/time) but that will require follow up.

Objectives

➢ To refresh your knowledge of the fundamentals of the LaMPSS solution

➢ To learn the business processes and system functionality associated with the case management lifecycle

➢ To get some hands-on experience with LaMPSS case management

The objectives for today's session are seen here.

Over the past few months you have had the opportunity to participate in various training activities offered by the LaMPSS team. These served to establish a base of knowledge which we can now build on.

We will refresh your knowledge of the LaMPSS solution before we get started with new material.

Then, we will move into a detailed review of each part of the case management lifecycle in LaMPSS. This will include demonstrations and hands-on exercises that will give you the opportunity to experience the LaMPSS solution yourself.

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Let's start with a review of some of the things you have already learned about LaMPSS!

LaMPSS Fundamentals

➤ Release 2.0 will deliver case management functionality to external service providers

In LaMPSS Fundamentals, you learned that Release 2.0 will deliver case management functionality to organizations like yours who currently provide Employment Assistance Services to Nova Scotians. Release 2.0 will also deliver agreement management functionality to Employment Nova Scotia for the management of funding agreements with individual clients.

LaMPSS Fundamentals introduced you to some key terms and concepts such as agreement manager, business partner and enhanced services. We will learn more LaMPSS terminology throughout this classroom training. Since this is a hands-on training session, you will actually have access throughout training to the LaMPSS glossary.

Although we won't revisit the LaMPSS service framework directly, during this session you will have a chance to see how the common service, activity and intervention types are used in LaMPSS. Remember, the service framework is simply a master list of standard names and definitions for labour market services.

LaMPSS Sign-In

Let's move further into the LaMPSS application itself for a refresher of some of the features you first learned about during LaMPSS Fundamentals. You will access LaMPSS through the sign in page seen here. You will enter your organization's LaMPSS ID, your user ID and your password to login. *<click to reveal X2 >*

Remember, if you forget your password it can be reset using the "Forgot your Password?" button on this login screen. *<click to reveal>*

Don't forget that when the LaMPSS application times out after a period of inactivity you will be returned to this screen!
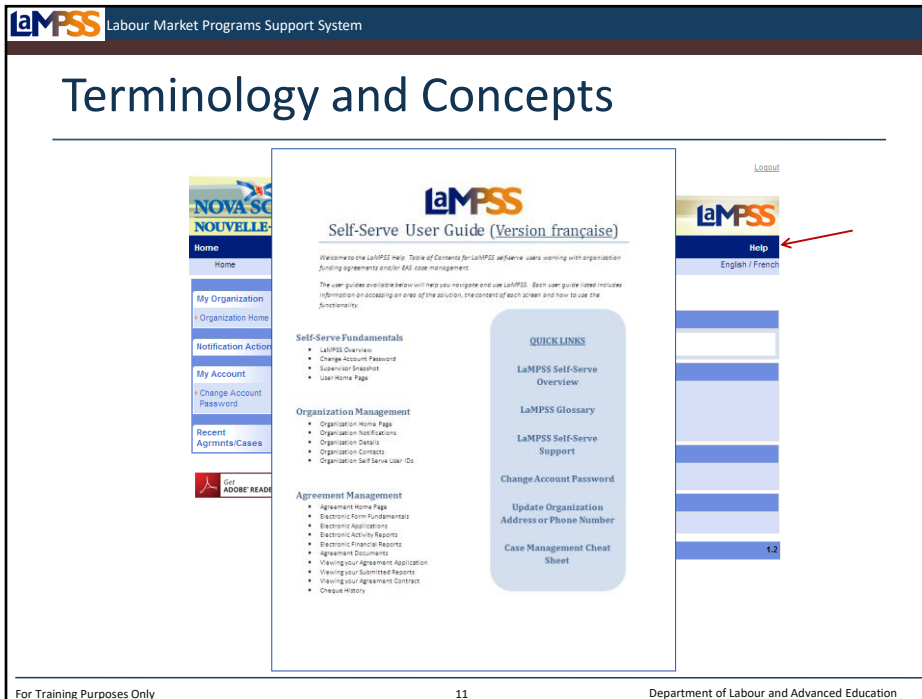
User Homepage slide
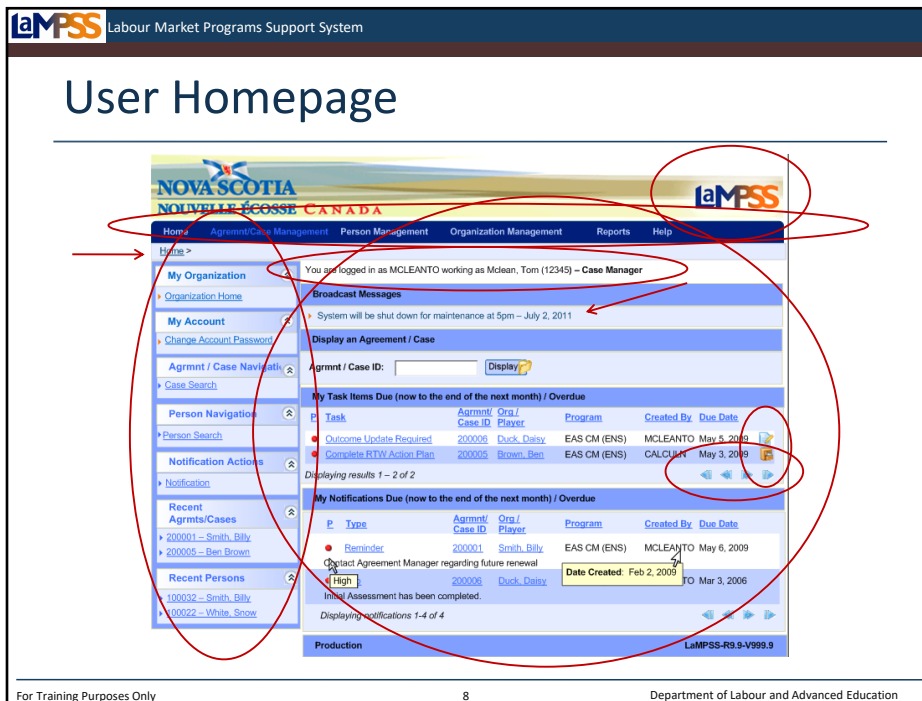
Once you've signed into LaMPSS you will be taken to your user homepage. Everyone with access to LaMPSS has a user homepage. Think of your homepage as a launching pad into your daily activities. This page will provide a quick view of due or overdue tasks and notifications assigned to you. In addition, your homepage gives you access to various menu options to manage any organization funding agreements with government and perform case management functions. An example of a typical case management user homepage is seen here.

All screens in the LaMPSS application have a similar look and feel. *<click to reveal>* You will also see that every page carries the LaMPSS logo in the upper right-hand corner. *<click to reveal>* Every LaMPSS screen has a top menu bar across the screen like the one you see here. The menu bar will always be present but the options in the menu will change depending on what home page is being viewed. For example, internal users have additional menu options that are not present in the self-serve menu bar. *<click to reveal>* Beneath the top menu bar is a breadcrumb line to show you were you are in the application and to allow you to quickly jump back to a specific screen. As you navigate from one area of the system to another this breadcrumb will build. *<click to reveal>* The side navigation panel, like the top menu bar, is dynamic and will change depending on where you are in the application and can be used to navigate through the system.

<click to reveal> The main body of the screen includes a variety of different sections. The top of your screen will show your login information. *<click to reveal>* For example, this screen reads "You are logged in as MCLEANTO working as Maclean, Tom (12345) – Case Manager". *<click to reveal>* Broadcast messages will appear in the main body of the user homepage to make you aware of any system maintenance, important dates, or changes that are coming up.

<click to reveal> You will also see VCR controls in a variety of places in the application when the information available exceeds what will fit onto one screen. These controls allow you to move through a list page by page or to quickly jump to the top or bottom of a list.

<click to reveal> Finally, don't forget your case notes! Case notes can be added throughout the system wherever you see the notes icons pictured here. We will learn how to use the case notes functionality during our hands-on exercises in this session.

For Training Purposes Only   11   Department of Labour and Advanced Education

Before we move on from the user homepage, let's review a user aid built into LaMPSS that will be available for you to use. In the navigation bar at the top of your LaMPSS screen there is a link to the LaMPSS Help table of contents. *<click to reveal>* By clicking on help, the table of contents will open in a new window, as seen here. *<click to reveal>*

The table of contents is separated into different sections such as organization management, agreement management and case management. You can quickly find the section that applies to what you are trying to do and then access a link to a detailed user-guide on that topic.

Also remember that for a more detailed, step-by-step review of how to use LaMPSS, online training modules will be available to EAS staff. These online modules will be very similar to the material you learn in the classroom; however, they will be available to you at all times and are even searchable by topic! We hope you will take advantage of these additional resources.

LaMPSS Training Sign-In Page:
< **https://lampss-prep.gov.ns.ca** >

Before we move into the case management lifecycle, let's take a few moments so we can all login to LaMPSS. Although we don't anticipate any issues, we would like to ensure that you'll be able to move through our hands-on exercises later this morning.

Could everyone please double click the LaMPSS icon on your desktop or navigate to <http://lampss-prep.gov.ns.ca> . The same external login page is used to access LaMPSS case management as LaMPSS organization management, so if you have been involved in submitting an application for funding using LaMPSS you may have logged onto LaMPSS in the past!

During customization training in February, your organization set up your user access profile. You received an email with your login credentials for LaMPSS which you were asked to bring with you to today's training session. In a moment you will enter your login credentials from this email on the LaMPSS login page. Ensure you select the checkbox to agree to the terms of use for the website then click the login button.

If your login is successful, you can take a few minutes to familiarize yourself with your user home page and the menus on your screen. If anyone has trouble logging in or does not have their login credentials please let me know. If you have signed in with your temporary password and need to change your account password please let me know and I can help you through the necessary steps.

Troubleshoot all sign-in issues contacting your Training Support as necessary.

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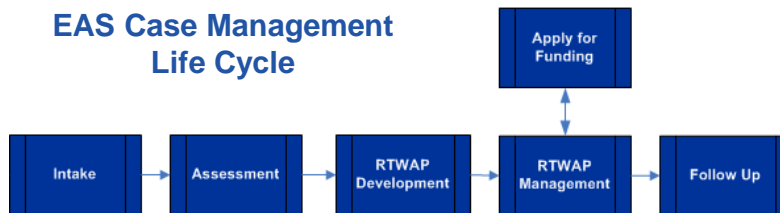 - ❑ Follow Up
- ➤ Next Steps
- ➤ Conclusion & Wrap Up

Now that everyone has logged into LaMPSS, we'll move into the section of the agenda that will comprise the bulk of our training over the next two days – the case management lifecycle.

Throughout today and tomorrow we will walk through each stage of the case management lifecycle. Our goal will be to teach you about and allow you to experience the basic functionality of LaMPSS, which combined with your existing case management expertise, will allow you to return to your organization after training feeling ready to start using the system!

Terminology

➢ In LaMPSS, *Case Management* is used to describe the process that starts with intake and assessment and ends after follow up.

EAS Case Management Life Cycle

Intake → Assessment → RTWAP Development → RTWAP Management ↕ Apply for Funding → Follow Up

As you've learned, case management is the term we will use with LaMPSS to describe the entire process from intake to assessment, through RTWAP development and management, then into follow up. In the past, you may have used the term case management to mean only those activities relating directly to the development, implementation and completion of the return to work action plan. Intake and assessment were thought of as pre-case management activities while follow up was thought of as a post-case management activity.

The LaMPSS solution defines the case management lifecycle through the use of business processes. A typical case progresses through the case lifecycle of intake, assessment, action plan development, action plan management, and follow up although it could be closed anywhere along this path.

In the EAS case management webinar we took an introductory look at each stage of the case management lifecycle and the typical activities that occur during each stage. In this training session, we will learn about each stage of the lifecycle in more detail. We will walk through each of the business processes, from intake through to follow-up, and practice what we learn at each stage.

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The first stage of the case management lifecycle is intake. Part of the intake process, as you'll see, is registering clients in LaMPSS so in this section we will take a detailed look at person management including creating a new person record, updating existing person records and sharing those records with government. Once we've looked at person management we'll learn and practice how to create a case in LaMPSS.
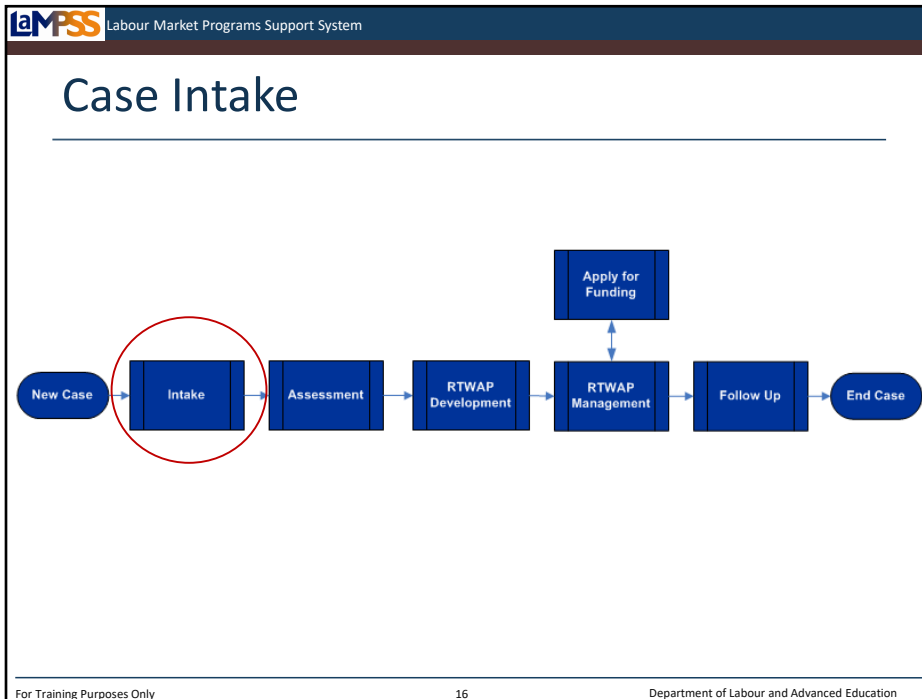
Case Intake

You can see here that the case management lifecycle begins with intake. The intake business process outlines the actions required of case management staff to record a person in LaMPSS when they visit an office. *<click to reveal>*

We've learned that LaMPSS provides case management staff with a comprehensive workload management tool that will promote consistency in the collection of client data, assessment and the creation of Return to Work Action Plans.

The intake process is a key part of this functionality offered by LaMPSS. The information you enter into the system during this stage will be used during the entire case management lifecycle.

Triage Client

As you know, Nova Scotians can visit an external service provider to obtain various Employment Assistance Services.

Some of the services available are self-serve and may not require any formal registration process; however, most services including case management do require registration. Clients who only want to use the self-serve resources offered by a service provider, such as job search computers or a job board, do not need to have a person record in LaMPSS.

During intake, you will triage each client who visits your centre to determine their needs. Unless a client is only accessing self-serve resources, the completion of an intake form will be part of this triage process.

Your organization's LaMPSS Administrator will use LaMPSS to generate an intake form that can then be printed and stockpiled for use. This form has been customized to your organization and collects the information required by LaMPSS to create a person as well as any additional case details your organization chooses to collect.

The form will also include a "Collection, Use and Disclosure of Personal Information" consent section. *<click to reveal>* This signed consent is required before you add a person to LaMPSS. When a client signs this consent section they are agreeing that your organization can collect personal information for services funded by government. This will involve the exchange of information between your organization, other service providers, training institutions and ENS.

The intake form will be used when a person visits a service provider in order to gather key information. The information gathered on the form will provide the necessary data to create a new person in LaMPSS or to update an existing person record.

Once the client has filled out the intake form, you will either add a person record in LaMPSS or update an existing person record if they happen to already exist as a LaMPSS person.

The first step is to search for the person in LaMPSS. The results of this search will help you determine your next steps. If your search returns an existing person record in LaMPSS, you do not need to create a new person. Instead, you will simply apply updates to the existing record to maintain the person details. The person record may have already been shared with government, but if not you should share it at this point.

If the person is not found in LaMPSS, a new person is created and the person details are entered based on the information gathered on the intake form. When a new person is created, LaMPSS will automatically navigate to the privacy and accountability screen where you will share the person with government.

Any time a person is shared with government, LaMPSS will check to see if the same person may already exist in the larger, government person registry.   If the person already exists and currently holds an ENS-funded agreement, you will be unable to update their information. You will forward a request to ENS to make any necessary updates to their information.

Let's move on to take a look at this process step by step in LaMPSS.

Do you remember this slide from the LaMPSS fundamentals webinar? It was intended to introduce the concept of the person and organization registries in LaMPSS. The fundamentals referred to the fact that service providers have the ability to keep a client private and that these private clients are stored in something called a VPD (virtual private database)

Person Management

Labour Market Programs Support System

As with many things in this application there is more than one way to access the person management functionality. You can access the person module through the top navigation menu, by clicking on person management *<click to reveal>* or in the left navigation menu by clicking on person navigation *<click to reveal>*.

Either of these routes will allow you to navigate to the person search screen. Whether you are searching for an existing person or adding a new person record, you will start by navigating to the person search screen.

Person Search

This is the person search screen. Please take note of the red search instructions button on the top right. This is a hover-over or tool tip so hovering over the button will cause a popup to appear with some tips on how to search the person registry. *<click to reveal/hide>*

When you perform a search you will be searching your organization's registry, including any person records your organization has shared with government. You can search by a variety of different criteria, but a good rule of thumb is to enter only one or two pieces of information the first time you search for a person. If too many results are found, you can then start narrowing the search criteria.

Person Search Features

- ➢ Cumulative type searching
- ➢ **Soundex** search on first & last name
- ➢ First & last name also searches **aliases**
- ➢ Partial searching on text entry fields
- ➢ Exact match only searching on SIN or DOB
- ➢ **Age range search** searches DOB to find matching age ranges
- ➢ Returns the first 100 records
- ➢ Default search results sort order is by name

Here are some of the rules that LaMPSS uses to search the person registry. LaMPSS will search the registry to find suitable matches based on the criteria entered. The more criteria you enter into the search fields, the more defined the search results will be.

In addition, name fields are searched using what's called a Soundex approach. LaMPSS will search for results that sound like the names entered, but the first letter of the names **must** match. For example, a search for John **Mac**Donald will also return any John **Mc**Donald results. Name search also searches aliases using the same principle. Searching aliases means that if I search for Jane Smith, a Janie Smith would also appear in my search results.

Partial searching is also possible. You can enter as many characters of a first name, last name, address, city, etc… On the other hand, if you enter SIN or DOB LaMPSS will only return persons who are an exact match. LaMPSS returns the first 100 records that meet the criteria entered, displaying 10 records per page. The default sort order of the results is by name, although similar to other LaMPSS screens you can click on the column headings to change the sort order.

Let's take a look at an example of search results.

This is an example of a search by last name only. This type of search may result in a large number of possible matches; however, it will reduce the likelihood of creating a duplicate person. A good rule of thumb is to search with a minimal number of criteria and then add additional search criteria to refine the results when required. *<click to reveal>*

This last name search results in X people. *<click to reveal>* The search results appear at the bottom of the page. *<click to reveal>* For each record, you will see the person's name, gender, address, date of birth and SIN. *<click to reveal>* If one of the search results is the person record you are looking for click on the blue, hyperlink name to navigate to that person record. In this example let's say that none of the returned results are the person we are trying to register. Once a search has been executed, if you have a role that allows you to add and update people you will see the add & save button at the bottom left of the search criteria section of the page. *<click to reveal>.* To continue and add a new person you simply need to complete the data entry of the person information and click the add & save button.

Adding a New Person

When adding a new person, you will have the intake form the client completed with most of the necessary information. Required fields are first name, last name, gender, address (including city, province, country and postal code) and date of birth. Optional fields include the middle initial, marital status, and Social Insurance Number. Social Insurance Number will be required, however, to create a case so it should always be entered.

SIN is required for all programs and a client's SIN is collected in accordance with the legislated uses documented on Service Canada's website.

As a best practice enter as much information as you have available when adding a person, not simply the minimum required. For example, although marital status is not a required field, I know Jane's marital status so I will enter it here. Once all information has been entered, select add & save. *<click to reveal>*

As you enter information, LaMPSS will perform some basic validations. For example, it will validate that a date of birth has been entered in the correct format and that you entered dates in date fields. When you select the add & save button LaMPSS validates the completeness and correctness of the data entered. If any of the checks fail, LaMPSS will display a red error at the top of the screen with messaging to indicate what revisions are necessary.

If there are no errors, LaMPSS will display a message to confirm that you really do want to add a new person record. *<click to reveal>* You will select OK to continue and you will be taken to the newly created person homepage. *<click to reveal>* Each LaMPSS person has a homepage that provides users with a snapshot of that person's involvements. The person homepage will display both past and current agreements or cases associated with the person, as well as their contact information. Since Jane is a new person in your organization's context in LaMPSS, you see here that she does not have any active agreements or associated cases at this point.

From Jane's person homepage, you can navigate to other screens in LaMPSS to maintain her information. In the left navigation menu you have several options, such as creating a case, managing person details, or viewing address history. Let's take a look at the person details screen first.

Person Details

- Person Details page allows you to manage information including:
  - ☐ Name
  - ☐ Address
  - ☐ Contact Number
  - ☐ Email Address
  - ☐ Aliases

- Each time the address is updated, history of previous addresses is maintained

The person details page, seen here, is divided into three main sections. They are person details, contact information and alias. In addition, you will see the person header near the top of the screen which provides basic information on this person such as date of birth, age and gender.

The person details section is where you will find and be able to update information such as the person's title, last name, first name, gender, martial status, languages, and date of birth. If a person's first or last name is updated a new alias record will be created with the person's previous name. We'll talk about aliases in a few moments. The address section can be used to enter multiple addresses as well as phone numbers and email addresses and select a default or primary address/number for each. When an address is updated in LaMPSS, the previous address will be maintained in the background and you can view all address history through the left navigation menu! *<click to reveal>*

All case management users from your organization who have an appropriate security role will be able to update this person information, except when the person has been shared with government and is already engaged in a funding agreement.

Finally, the last section on this screen is aliases. You can both enter new aliases for a person and view existing aliases here. Any alias entered will also appear on the person homepage and will be included in any future person search. Let's take a closer look at aliases.

Aliases

- LaMPSS automatically creates alias records when the first and/or last are changed

- An alias can be manually added by a user with an appropriate security role

- LaMPSS searches aliases when you do a Person Search by first or last name!

- Alias records can only be removed by LaMPSS Operations Support

Hello, my name is:

JJ

Hello, my name is:

Jane

Hello, my name is:

Janie

Most of us can think of lots of examples of people who go by multiple names, a nickname, or who change their name when they marry/divorce. This means that the person search functionality in LaMPSS needs to be more sophisticated than simply searching for an exact match on first name and last name.

LaMPSS will automatically create alias records when specific conditions are triggered. If a first name or last name is updated on the person details page, an alias record is created to show the previous name. Additionally, an alias could be created manually by a LaMPSS user. If our client Jane prefers to be called JJ the case manager could add an alias. Please exercise caution when adding aliases however, because if an alias has been entered in error, or should be removed for any reason, a request will need to be issued to LaMPSS Operations Support.

Remember when we were discussing searching for a person? LaMPSS will search these aliases when you execute a search by first or last name! When you update a person's information in LaMPSS, please ask that person if they go by other names and enter this information as an alias in the system. This will make searching easier and avoid creating duplicate person records!
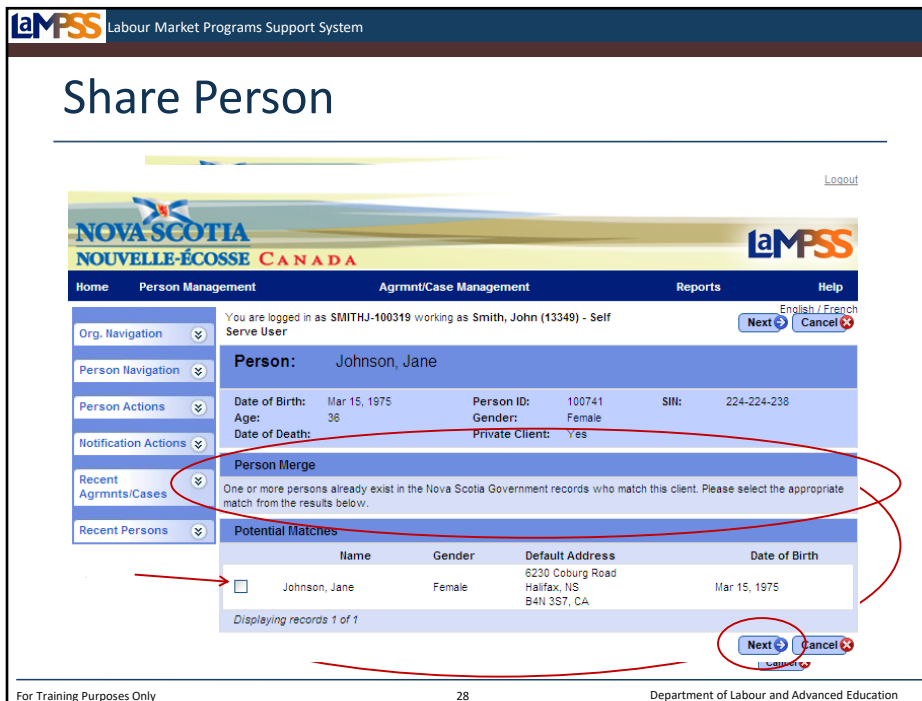
Share Person

Now let's move back to the person homepage and begin our review of how to create a new case for this person in LaMPSS. In the left navigation menu, you will see a link to create a case. *<click to reveal>* Unless the person you are working with has already been shared with government, you will initially be taken to the share person screen. This screen is also available directly through the left navigation menu. You do not have to create a case in order to share someone with government. Before we look at sharing this person, take a moment to note that a person ID has now been added to the person header on your screen. The person ID is unique six-digit identifier that is assigned to this individual. *<click to reveal>*

This is the screen you will use to indicate that you have obtained signed consent from the client. It is here that you will share the newly added person with the government context. *<click to reveal>* All of your EAS clients will be shared with government, so you will click on the share button. *<click to reveal>*

If a match or potential matches are found LaMPSS will display those matches and wait for you to select which potential match you would like to merge with the person record. The person merge screen instructs you to select the appropriate match from the results displayed. *<click to reveal>* Use the checkbox to select the person you would like to merge *<click to reveal>* and then click next. *<click to reveal>* You will be taken to the next person merge page.
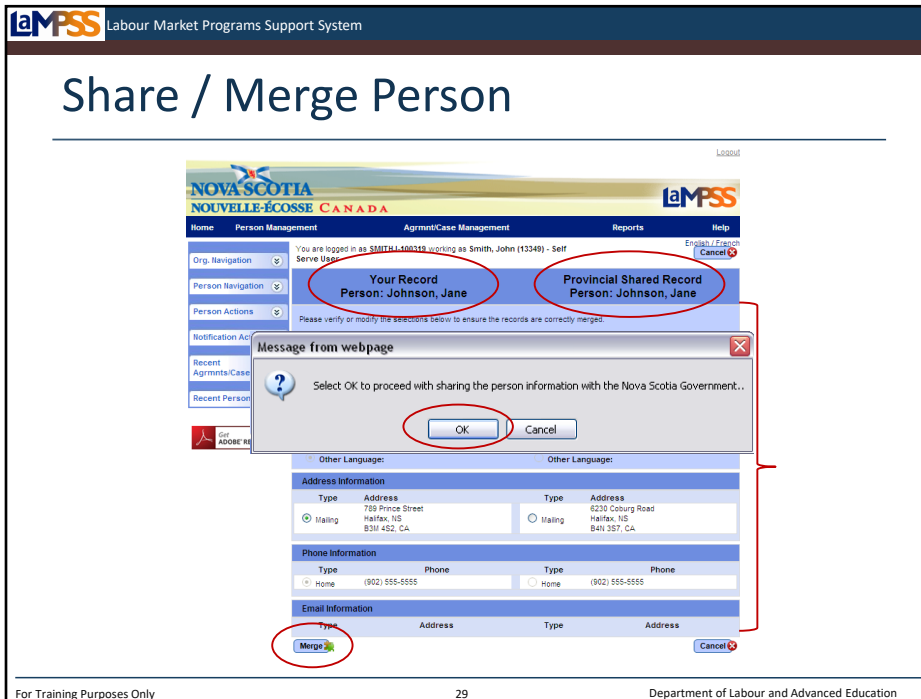
Share / Merge Person

This page will display your person record and the person record you have selected to merge with. *<click to reveal>* You will review the information listed for each version of the person record and modify the selections if necessary to ensure the records are merged correctly. *<click to reveal>*

When you are finished verifying all information, click the merge button near the bottom of the screen. *<click to reveal>*   LaMPSS will display a message requesting you to confirm you wish to proceed with the merge and share the person information with the Nova Scotia government. *<click to reveal>*   Click OK to complete the process. *<click to reveal>*

Person Management

We've now reviewed the basics of person management in LaMPSS. You can see that there's certainly a lot to consider for each client such as what updates are necessary to their person details and whether you should merge with another person record. Using the add or update person process we looked at earlier, in addition to the user guides available in the system, will help you walk through the necessary steps.

Remember, you won't only be updating a person record the first time you add a new person to LaMPSS, each time a person's information changes you will need to make updates. Life events such as marriage, divorce, buying a home, having a baby or even minor events such as getting a new cell phone number will require changes to person details in LaMPSS!

If you are assigned as the case manager for a person, and certain person details are updated by someone else – either within your organization or at ENS for a shared person – you will be notified through LaMPSS that the information for one of your clients has changed! This tool will help you keep track of any changes that you may need to be aware of.

Exercise – Search/Add Person

Let's get back into LaMPSS and work through the process of searching for and adding a person record. The person record you create as a part of this exercise will be your client for the next two days of training.

Instructor-led Exercise – Search/Add Person

Exercise – Update Person Details

Now that we've created a person record for the client, let's explore the rest of the person management screens that you will need to be familiar with.

Instructor-led Exercise – Update Person Details

Add Case

➤ Once the person record has been created/updated and shared with government a new case can be created in LaMPSS

➤ A case defines the service provider's engagement with a person

Once a person record has been either created or updated and shared with government you are ready to create a case for the client. The case status of the new case will be intake.

Remember, a person and a case are two distinct concepts in LaMPSS with some shared information such as contact information. A case defines a service provider's engagement with a person.

A case may be as simple as a record that the person attended a resume writing workshop and the case was closed, or it could be as significant as a record of their education, employment, skills, knowledge and needs assessment. Cases may include the development of a return to work action plan or an application for an ENS-funded intervention.

The client's SIN is mandatory to be able to create a case in LaMPSS.

Add Case

➢ Case Manager will enter all required case details to create a new case in LaMPSS

➢ If the client has previously had a case in LaMPSS with the organization, details can be copied from the previous case.

The steps you will follow to add a new case will depend on whether this is the person's first case in LaMPSS. If it is their first case, you will add all the necessary case details. If your organization has previously created a case for this person, you will have the option to copy some details from an existing case. Once you copy a case, you will have the opportunity to modify the case information and to make any necessary updates.

For training purposes, we will assume we are working with new clients who have not had a case in LaMPSS before. This will be the situation you encounter most frequently over the next few months as we all begin using LaMPSS for case management.

Once the case has been created, you are ready to move on from the intake stage of the case management lifecycle. In order to complete intake you will complete an intake task. This triggers the generation of a new task and takes you into the next stage of the lifecycle – assessment.

Add Case

Select create case in the Person Actions menu

The add case module of LaMPSS can be accessed through the person homepage by selecting the create case link in the left navigation menu. Using this link, a user from your organization with the appropriate security can add a new case and assign a case manager.

In this screenshot from LaMPSS you will see that this case manager is creating a new case for Jane Johnson. Jane's basic information is displayed in the person header at the top of the person homepage.

Add Case

➤ Enter new case information *or* copy case information
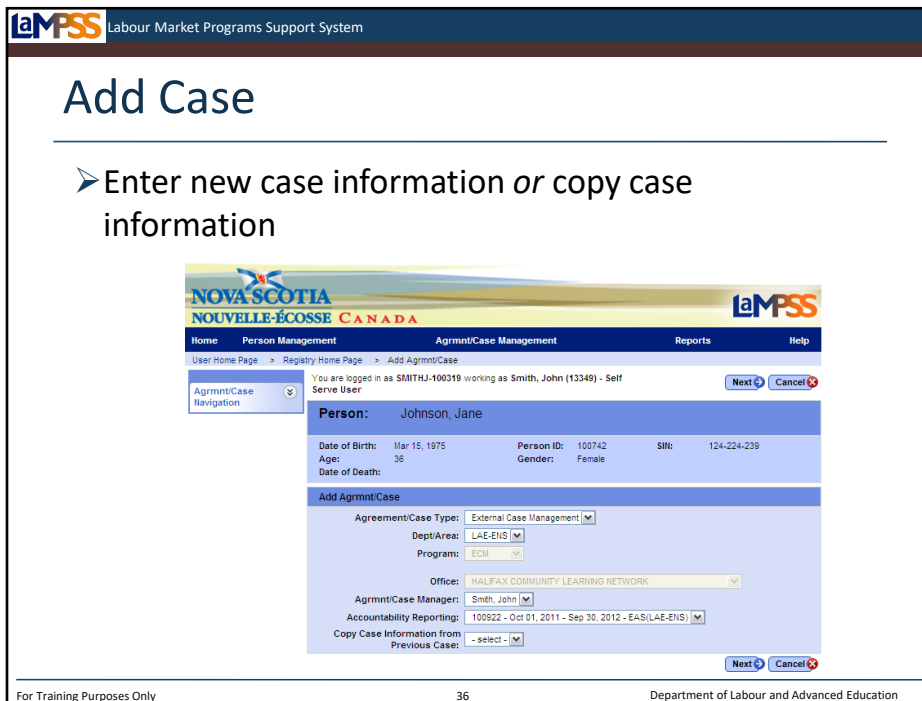
Once you select the link to create a case, this add case screen will appear. For LaMPSS Release 2 the first three fields on this screen will default to show that you are a service provider delivering an EAS agreement working with external case management.

The case manager field will automatically be populated with a list of case managers in the selected office and will default to the user who is creating the case. The next field, accountability reporting, is used to indicate if this case should be associated with a specific EAS agreement for activity reporting.

You will see private as an option in the accountability reporting drop down menu. If you are working under an EAS agreement be careful **not to select private**. Some organizations will use LaMPSS to manage cases outside of the EAS program. These organizations may choose private when creating a case, but these cases are not counted as a part of the organization's EAS activities.

The ID of the organization funding agreement as well as the start date, end date and program will be displayed. Finally, if the client has previously had a case at the selected office location, the user will be able to select a previous case ID from the drop-down menu on this screen. This will allow some key information to be carried forward from the previous case.

When you click next, LaMPSS will verify that all required fields have been completed before taking you to the registration details screen. If you cancel at this point you will be returned to the person homepage.

Add Case

➢ Complete entry of basic case information using the intake form

The registration details screen will allow you to complete the entry of basic information about the client.

For example, you will select the client's preferred contact method, such as phone or email and the language to be used when sending correspondence to this individual. Other information to be entered includes the person's employment status and EI benefit information. Please note that LaMPSS does not verify the EI information entered on this screen. The information will need to be verified later on for clients who apply for a funded intervention with ENS.

When you save this screen, once again LaMPSS will verify that all required fields have been completed. The case details will then be saved to the system. The case will be assigned an ID and a new task is created for the case manager to remind them to complete the intake process. Once saved you will be automatically directed to the case homepage.

Case Homepage

The case homepage contains a summary of the case information and the ability to navigate to most case-related functions. Important tasks and notifications related to this case are displayed here as well.   During intake, a task will appear on the case homepage reminding the case manager to complete the intake process. This task will also appear on the case manager's own user homepage.

 The case header seen near the top of the screen here includes information like the case manager, office, client name and Social Insurance Number. The case header is a common header used across all case screens in LaMPSS.

Exercise – Add Case

Now let's move back into LaMPSS and create a case for our clients!

Instructor-led Exercise – Add Case

More Case Information

- ➤ Target group membership
- ➤ Willingness to relocate
- ➤ Health and disability details
- ➤ Education history
- ➤ Work experience
- ➤ Citizenship information

If desired, some additional information can be entered during the intake process such as education and work experience; however, this information can also be updated during assessment. Your organization has determined what specific additional case details will be required. This and your professional judgment will offer you guidance on how much information to enter at this point.

Intake Task Outcomes

➢ Completed Intake
  ❑ Case status changes to Assessment
  ❑ "Complete Assessment" task created

➢ Self-Serve Only, Group Services Only, Referred Out
  ❑ Case status changes to Closed

Once the intake process is complete, LaMPSS will require that you address the client's situation by completing what's known as the intake task. There are several options when completing the task that you will be able to use to reflect what the next steps are for the client. Remember, this task is assigned a due date when it's created and will show on your user homepage and case homepage a month before it is due and once it is overdue!

If the client is going to continue working with you and continue through the case management lifecycle you will select that you have completed intake. This will move the case forward into the next status of assessment. Automatically, a new task will be created to remind you to complete assessment as soon as you complete the intake task.

If you determine that the client is only going to access self-serve resources or group services, or you have referred them to another organization, you will close the case by selecting the appropriate outcome for the intake task. Each of these outcomes will be available from a drop-down menu on the task.

Exercise – Complete Intake

Let's finish up the intake business process for our client by completing the intake task. For the purposes of training today, please indicate that your client has completed intake and will be moving on to assessment.

Instructor-led Exercise – Complete Intake
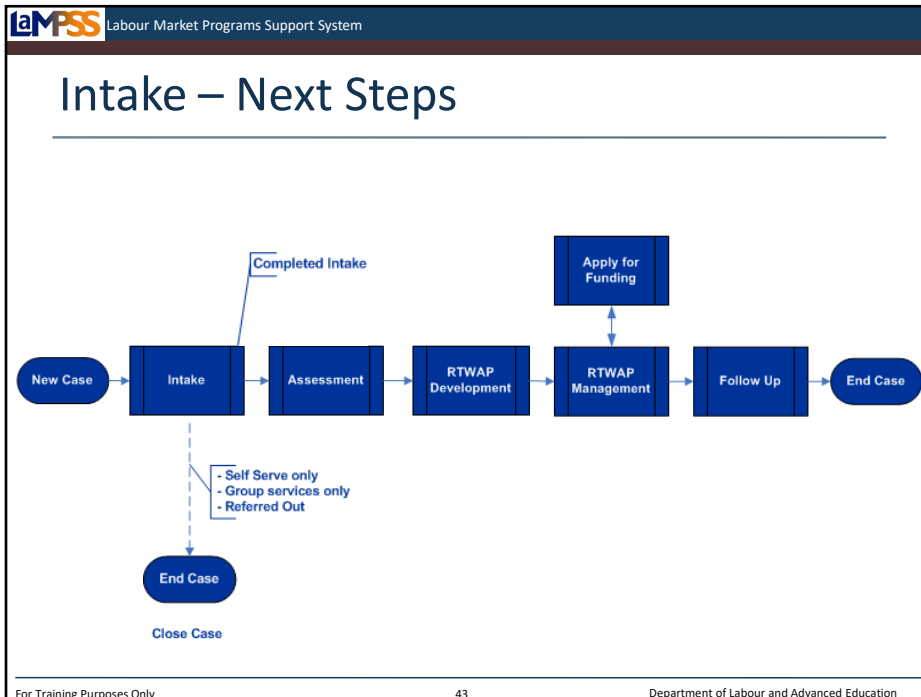
Intake – Next Steps

Completed Intake

New Case → Intake → Assessment → RTWAP Development → RTWAP Management → Follow Up → End Case

Apply for Funding

- Self Serve only
- Group services only
- Referred Out

End Case

Close Case

<click to reveal> You will see here, that if you determine the client is only going to access self-serve resources or group services, the case can be closed directly from intake. Alternately, you may determine that the client should be referred to another organization and close the case. Each of these outcomes is available as an option when completing the intake task.

The other option, as we've just seen through the exercise, is that the intake process is complete and the case will move into assessment. *<click to reveal>* Completing the intake task to indicate that the intake process is complete will move the case into the next stage of the lifecycle.

Agenda

➢ Welcome & Objectives
➢ LaMPSS Refresher
➢ Case Management Lifecycle
   ❑ Intake
   ❑ **Assessment**
   ❑ RTWAP Development
➢ Enhanced Services
➢ Case Management Lifecycle
   ❑ RTWAP Management
   ❑ Follow Up
➢ Next Steps
➢ Conclusion & Wrap Up

The next stage of the case management lifecycle is assessment. Let's talk about what LaMPSS screens are used during assessment and the typical activities that a case manager will complete during this stage.
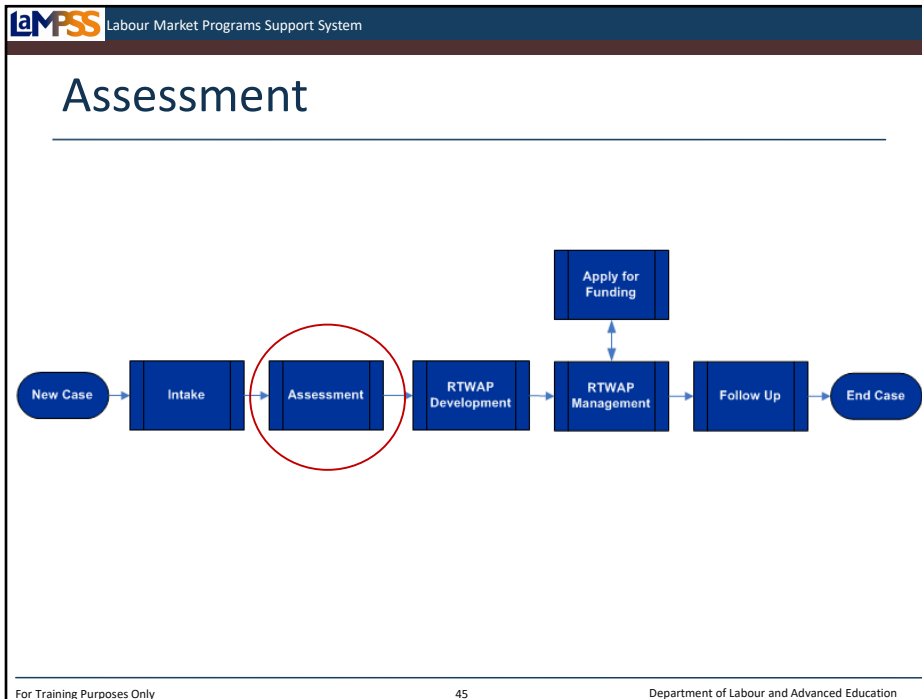
Assessment

<click to reveal> During assessment, a case manager will collect all the additional information they need to assess a client's needs. This will include things like the client's education history, job history, as well as other skills and experiences. The assessment stage of the case management lifecycle ends with the completion of a needs determination. During assessment you will assess each client's barriers to employment and start determining their employment goal and job preferences.

Remember, LaMPSS is a workflow application that will guide you through the process, at a high level for managing cases; however, you will continue to rely on your professional expertise and judgment to actually assess each client you work with. During assessment you will engage in similar types of activities to what you currently do with clients, but will record information and observations in LaMPSS.

Assess Client

<Brainstorm with participants – What activities do they currently consider to be part of their 'assessment' of a client>

All of these things you have mentioned will continue to be part of your assessment process when you start using LaMPSS. The key difference is that LaMPSS is a tool you can use to gather and record client information, make notes, and attach documents.

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Complete Assessment Form

Assessment Information Form
Opportunity Zone

Identification Information
Last name:

First name:

Middle initial:

SIN:

Birth date:

Education History
Do you have a Grade 12 diploma or GED?   ☐ Yes ☐ No   Year attained:

Highest level of post-secondary education you have completed: Year attained:

Please provide your educational history below. Including courses or programs completed, started but never finished, or currently in progress. Include post-secondary, trades, and other training courses taken.

Program/Course Name   School/Training Institute

Start date   End date
                              ☐ Completed ☐ Incomplete ☐ In progress

Program/Course Name   School/Training Institute

Start date   End date
                              ☐ Completed ☐ Incomplete ☐ In progress

Program/Course Name   School/Training Institute

Start date   End date
                              ☐ Completed ☐ Incomplete ☐ In progress

Page 1 of 3   Form generated: 2011-01-13 2:36

➤ Customized assessment form for your organization

➤ Collects more detailed information required to assess a client's needs

Just as your organization's LaMPSS administrator was able to use LaMPSS to generate an intake form, they can use LaMPSS to generate an assessment form, if desired. This form can then be printed and stockpiled for use. Like the intake form, the assessment form is customized to your organization to collect the information you require to complete assessment activities with a client.

The assessment form may be used to collect additional information such as education, employment history, and other skills or knowledge that your organization decided to collect and record in LaMPSS.
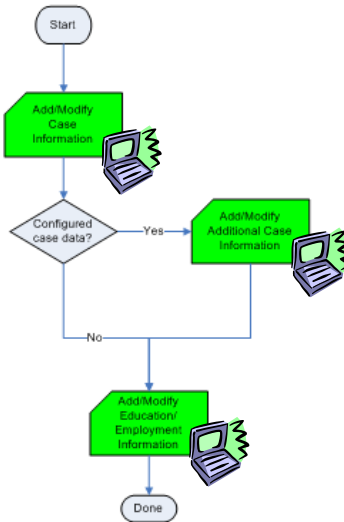
During the assessment process, you will work with the client to collect additional information, using any tools or documents your organization has developed. The only difference is that as information is gathered, you will enter it into LaMPSS. Any documents you presently use as a part of assessment can be attached directly to the LaMPSS case by using the case documents functionality. We'll look at an example of how to do this shortly.

The first step in LaMPSS, as seen in this process diagram, is to add basic case information to the system or to modify any information entered during intake that may have changed. Then, if your organization has configured LaMPSS to collect additional information like legal status or health and disability details, this information will also be entered into LaMPSS.

Additional Case Information

➢ Each organization customized LaMPSS to gather additional case information

➢ Additional case information was configured to be optional or required

➢ The order of additional case information on forms and screens was customized

You may remember from the EAS Case Management Lifecycle webinar that each service provider customized LaMPSS to gather additional client characteristics that are unique to your organization. *<click to reveal>* Since some organizations require different information based on, for example, their EAS agreement or target groups. LaMPSS is designed to enable each organization to capture optional case information.

Each organization also determined whether or not information is required or optional *<click to reveal>* as well as the order in which they will appear on the LaMPSS forms and LaMPSS case management screens. *<click to reveal>*

Let's take a look at some examples of possible additional case elements.

Additional Case Information

➤ **Life Situation**
- ❑ E.g. Do you require dependent care for you to be able to work and/or participate in training?

➤ **Health and Disability Details**
- ❑ E.g. Do you have a mental health issue that affects/limits your ability to work or participate in training?

➤ **Legal**
- ❑ E.g. Have you ever been convicted of an offense of which you were not granted a pardon?

➤ **Immigration**
- ❑ E.g. Country of Origin?

There are four subject areas for each organization to consider and decide whether or not they will require additional information to be collected for clients. The four areas are life situation, health and disability, legal status, and immigration. *<click to reveal each>* Within each area there are specific questions your organization may choose to include in addition to specifying the order in which those questions appear and whether they are required or optional for every case. Some sample questions are seen here.

<Review sample questions>

The organization used in the examples for this case training material has selected minimal additional case information and this has been configured by the organization's LaMPSS administrator. You will see this additional information that has been selected on some of the slides we will be illustrating shortly. **Since every service provider has the option to configure their own case information and you are working within your own organization's configuration during training, you may find from this point on in this training session that your case information screen has more or less information than the examples shown.**

Add/Modify Assessment Data
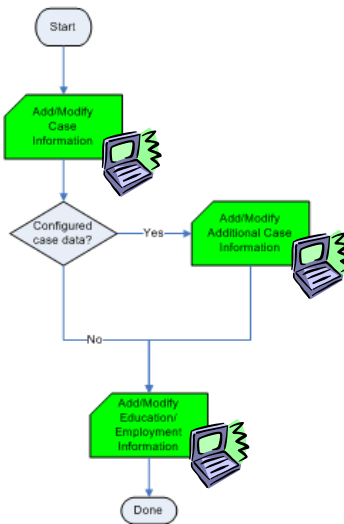
Once the common case information and any additional case information has been entered in LaMPSS, you'll see here that the final assessment data that needs to be entered is information about the client's education and employment history.

The next step will be to complete the needs determination in LaMPSS, but first let's look at the screens where all of this assessment information is captured!

Common Case Information

LaMPSS — Labour Market Programs Support System

Case ID: 100923 — Johnson, Jane

➢The maintain case additional information screen has 4 sections:
- Case Header
- Referral Details
- Case Information
- Additional Case Information

➢Different types of questions:
- Drop-down Lists
- Pick Lists
- Checkboxes
- Free Text Boxes

This is the maintain case additional information screen in LaMPSS. This screen is accessed through the left navigation menu under the case actions header. *<click to reveal>* This screen allows you to capture some common case information for the client as well as additional case information required by your organization.   There are four main sections on this screen *<click to reveal>* :

-Case header

-Referral details

-Case information

-Additional case information

The case header is simply the standard header with basic case information that will appear on all of the case screens. The referral details will ask you to indicate how the client was referred to your organization and depending on the answer, you may want to provide some additional information such as the name and phone number of the person or organization who referred them to you. *<click to reveal>*

The case information includes details like the clients residency status, targeted group membership, and factors that may impact service participation. *<click to reveal>* Throughout this page you will notice that there are a variety of different types of questions. *<click to reveal>*   In some cases you may select an answer from a drop down menu, choose multiple selections from a pick list, select a checkbox, or type information in a free-text field. You're likely familiar with most of these types of questions, but let's take a quick look at a pick list. *<click to reveal>*   You select the magnifying glass to view the list, check the boxes for the items that apply for the question, and then click away to hide the list. *<click to reveal>*

<click to reveal> Here you see an example of an additional case information screen that has been completed for our sample client, Jane Johnson. You'll see that not every field on this screen is required, because not every field will apply for every client.

*Pause to answer any questions about fields on the screen. Additional case information is addressed on the next slide.

Additional Case Information
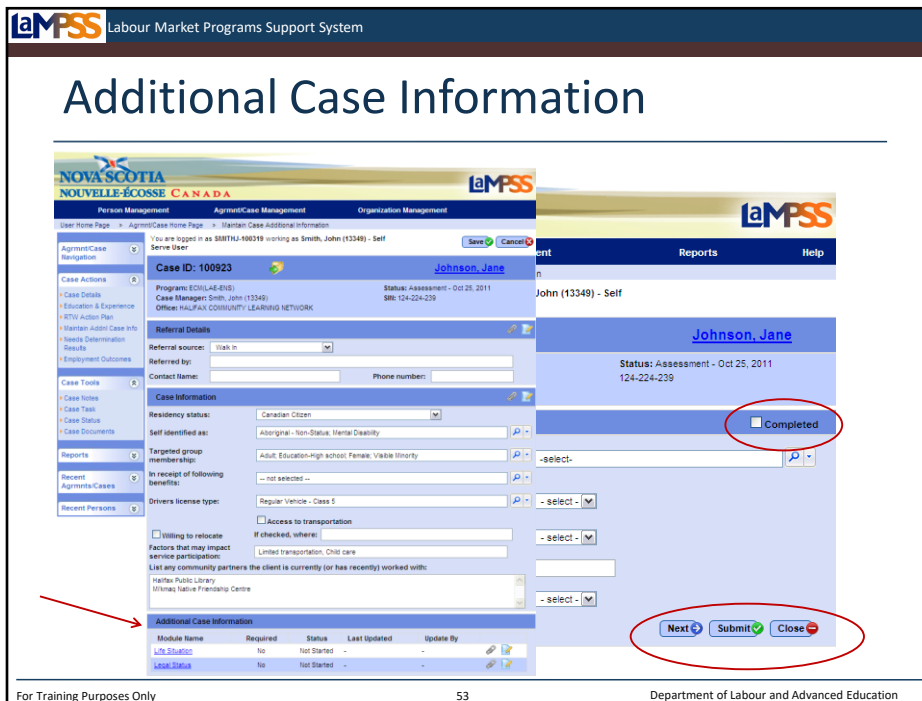
The additional case information module is located at the bottom of the maintain additional case information screen. This is an example of what an additional case information module might look like. *<click to reveal>* Not every organization will decide to collect additional information, so for some of you there may not be anything listed in this section of your screen. Any number of the four case information categories we reviewed earlier could appear here. Clicking on the blue, hyperlinked name of one of the modules will navigate you to a new screen. Let's take a look at the life situation module. *<click to reveal>*

This is an example of an additional case information screen. Each module has specific questions which your organization will choose to appear in a particular order. *<click to reveal>* Some are optional, some are required. For each module on your screen, you will answer the questions listed. If you have more additional case information to complete after this screen, use the next button seen here to navigate directly to the next module. The submit button will return you to the maintain additional case information screen. *<click to reveal>*

Also, notice the checkbox near the top of the screen where you will indicate if the information in this additional case module is complete. *<click to reveal>*

Maintain Additional Case Information

> Remember to **Save** before any period of inactivity or before navigating away from the screen!

> When a case screen is saved, you will be directed back to the Case Home Page

Taking a final look at our example of this screen, you can see that the status of each additional case information module has been updated to either in progress or completed. The status will only change to completed once you have selected the completed checkbox in that module. *<click to reveal>*

To save all the updates you have made, use the save button at the top or the bottom of your screen. *<click to reveal>* Each time you save you will be returned to the case home page. *<click to reveal>* Don't forget, LaMPSS will time out after a period of 20 minutes of inactivity. If you leave this screen unattended for longer than 20 minutes and have not saved your work, the information will be lost.

Exercise – Enter Case Information

We're about to move back into LaMPSS to complete the additional case information screen for our client.

Your access to LaMPSS has likely timed out at this point, so you will need to log back in using the login information from earlier today.

We will work through each of the steps involved in entering additional case information together, however, remember to use your own client's Information.

Instructor-led Exercise – Enter Case Information

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Education & Experience

- ➢ The education & experience screen has 4 sections:
  - ▪ Case Header
  - ▪ Education/Training
  - ▪ Employment History
  - ▪ Other Skills/Knowledge

- ➢ Information can be updated during intake, assessment, RTWAP development & management

Now let's move onto the next assessment screen. Education and experience is accessed through the left navigation menu under the case actions header. *<Click to reveal>* This screen has three main sections, aside from the standard case header, which we will review one-by-one on the next few slides. *<Click to reveal>*

This screen is used to capture important case information about the clients education and employment experiences. You will be able to revisit both this and the additional case information screen throughout assessment, RTWAP development and management to add more information and expand upon the information you have already recorded. *<Click to reveal>* Screens like this one are used to populate the application package so all education and experience instances should be captured.   Also, case notes – which we will look at shortly – can be added at any point.

Education/Training

➢ Record the highest education level the client has achieved
➢ Add an Education/Training/License row for each of the client's achievements, including information such as:
  ❑ Education/Training/License Name
  ❑ Source/Location
  ❑ Result
  ❑ Dates

The first section on the education & experience screen is the education/training section. In this section you will record the highest education level the client has achieved and record some details about their education. To do this, you will select from the drop-down menu seen here *<click to reveal/hide>*.

A single row for education, training and licenses will be provided when a new case is created. *<click to reveal>* At least one row must be completed. Here you'll see an example showing that Jane achieved her high school diploma in 1993 at Queen Elizabeth High School. Additional rows can be added using the add another button. *<click to reveal>* For each item you add you will need to provide information like the school or location and dates.

You should provide details on all past and current education and training, including any training or courses funded by ENS.

Employment History
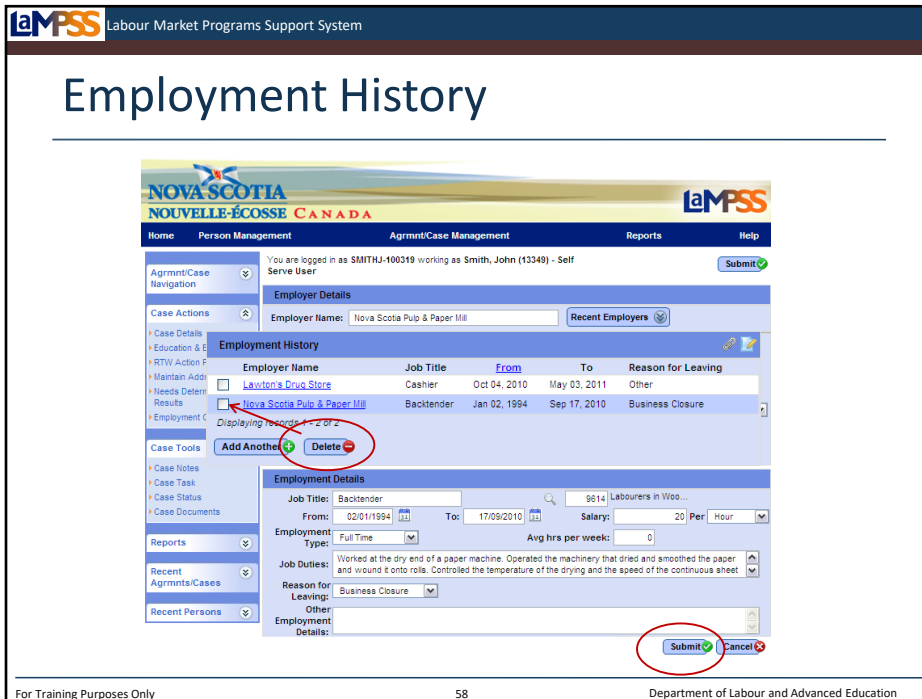
The next section of the education and experience screen is employment history. You will use this section of the screen to add each instance of employment history for the client. To begin, click the add another button to navigate to the employment detail screen. *<click to reveal>*

For each employment the client has had, you will enter the following information:

-Employer

-Job Title

-NOC Code

-From/To Dates

-Employment Type

-Average Hours per Week

-Job Duties

-Reason for Leaving

-Other Employment Details

Notice that for employers you will be able to select from a list of recent employers by clicking on the box seen here. *<click to reveal>* Selecting one of the options in this drop-down list will auto-fill the address section. Here is an example of the employment details for our sample client, Jane. *<click to reveal>* When all information has been entered, use the submit button to return to the main employment history screen. *<click to reveal>*

<click to reveal> The employment history module of the education and experience screen will update and show a list of employment as history is entered into the system. If at any point an entry is made by mistake, you can remove it by selecting the checkbox next to the employer name and clicking the delete button. *<click to reveal>*
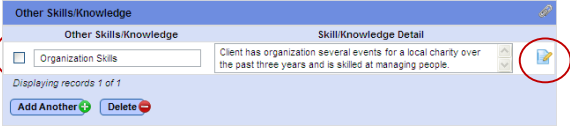
You should capture the clients employment history now and over the last 5 years. Also include any significant employment that is relevant to an ENS funded application. ENS defines significant employment as any employment record where the client has been with one employer for 5 years or more.

If a client has limited work experience or periods of unemployment, you will be able to explain in the case manager's statement if you initiate an application for funding.

Other Skills/Knowledge

- ➤ Record any additional skills or knowledge the client may have
- ➤ Use the Add Another button to create as many rows as required

Finally, let's take a look at the other skills and knowledge module. This section can be used to record a wide variety of things such as organization skills or computer skills.

<Brainstorm with participants – What other things could be listed as other skills/knowledge>

To add a record to this section click the add another button. *<click to reveal>* A new row will be created where you will need to record the type of skill or knowledge the client has. This is a free text field and will allow you to enter up to 25 characters. Then, you will enter details of the skill such as when and where it was acquired. Add as many rows as necessary to record all of the client's additional skills or knowledge that you have identified throughout your assessment. Additional information can be included in the case note associated with each skill entered here. *<click to reveal>*

Education & Experience

To save all the updates you have made, use the save button at the top or the bottom of your screen. *<click to reveal>* Once again, you will be returned to the case home page.

You can revisit this education & experience screen later to add more information if necessary.

As you are working through these screens, don't forget that LaMPSS has a full suite of online user guides to help you. You can access LaMPSS help through the top navigation menu. *<click to reveal>*

Exercise – Enter Education & Experience

Now let's move back into LaMPSS and enter the education and experience information for our client.

Remember, for training purposes we aren't as concerned with each of you entering quality, complete information as we are with giving you a chance to experience the functionality of each screen and ask questions.

Let's work through this exercise together.

Instructor-led Exercise – Enter Education & Experience Information
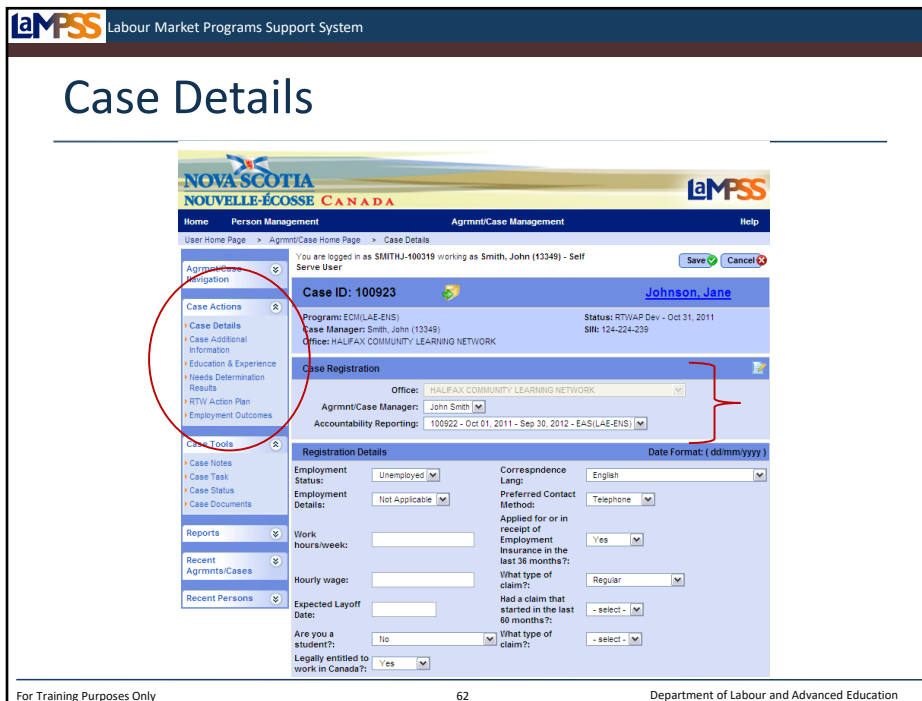
Case Details

Another screen you may need to use during assessment, or other stages of the case management lifecycle to update client information is the case details screen, which you see here is accessed in the left navigation menu under case actions. *<click to reveal>*

The case details screen displays, and allows you to update, some of the information you entered when you first created the case such as employment status, correspondence language, preferred contact method and EI benefit details.

This is also the screen you would use to transfer responsibility for Jane's case to another case manager within your organization. *<click to reveal>* Let's take a look at this.

You don't have to transfer a case in order for another case manager to work on it. Any case manager within your organization with the appropriate security can view and update Jane's case. A case should be transferred when you want to officially move the responsibility for the case, as well as all associated tasks and notifications, to another person.

Please follow along on my screen with this demonstration of how to transfer a case. When you transfer a case to a new case manager, all of the tasks associated with that case, like the complete assessment task, will be moved to the new user. Also, the case manager will be notified that they have received new work.

Demonstration Only – Transfer Case

Before we move on from assessment, let's revisit case notes which you originally learned about during LaMPSS fundamentals. Notes are annotations all LaMPSS case management users will be able to create and save throughout the system. Notes are an important tool to capture the thinking that has gone on at different points in the case lifecycle. Notes can be created, edited and viewed at various stages of a case. Your notes are not going to be visible to Employment Nova Scotia staff through LaMPSS.

Ask for examples of when users may want to add a case note (eg. To capture a discussion with a client, to clarify details relating to information entered on a screen)

Notes should always be long enough to capture any relevant information and explain it thoroughly enough that another user can view and understand the note. Don't use notes, however, to restate information or describe a situation that is evident by reviewing the case screens. Remember, all LaMPSS case management users within your organization can view notes made on any cases with your organization.

Case Notes

➢ LaMPSS "tags" a note to make it easier to find
  ❑ User ID
  ❑ Date & Time
  ❑ Where it was created
➢ Included on reports
  ❑ e.g. Case Detail Report
➢ Notes can be edited for 30 days
➢ LaMPSS automatically locks notes after 30 days

Let's review some key features of case notes.

LaMPSS will tag each note to make them easier to find. The user ID, date and time will be automatically stored with the note as well as the place in LaMPSS where the note was created. For example, if you create a note on the education and experience page it will be tagged with this location as well as your user ID (e.g. SMITHJ) This means there is no requirement to sign notes. The user ID identifies who created the note.

For the first 30 days after a note is created, the user can edit the note if necessary, although best practice is always to create a new note to provide additional information instead of editing an existing note. The application will automatically lock notes after this 30 day window. All notes will remain part of the electronic history/audit trail of the case.

Exercise – Add Case Notes

Let's practice using notes by making some notes about the information we entered on our clients' education and experience.

Instructor-led Exercise – Enter Case Notes
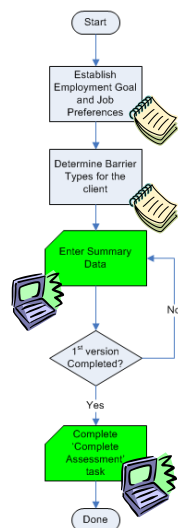
As a case manager, you will engage in the assessment process until you are ready to enter a needs determination in LaMPSS.

LaMPSS does not prescribe a method or enforce a process for assessing a client's needs. Each service provider will continue to use their expertise and own methods to meet with clients and analyze information to identify their needs.

LaMPSS does require, however, that a service provider enter a summary of needs resulting from this process. The needs determination summary is completed by identifying client barriers within each of the four employability dimensions and identifying an employment goal with job preferences. This information will be captured on the needs determination screen.

Let's walk through the steps in this process.

Needs Determination

➢ Establish employment goal
➢ Establish job preferences
➢ Determine employment barriers
  ❑ Are the employment barriers relevant to the employment goal?

During your assessment of the client, you will need to establish their employment goal to enter in LaMPSS – the options will be full-time employment, full capacity employment or self employment. Full capacity is an employment goal specific to persons with disabilities and indicates the full extent of the client's ability to work.

Basically, you need to establish the client's reason for seeking employment assistance. You will also want to establish the clients job preferences. These will be entered in LaMPSS as well.

Remember, LaMPSS is simply a workflow application that will guide you through the process, at a high level for managing cases. You will continue to rely on your professional expertise and judgment to actually assess each client you work with. Part of your assessment will be a determination of whether or not the client has any employment barriers and whether or not those barriers are going to affect their ability to achieve their employment goal.

As you gather all of this information from your client, you can fill out the needs determination screen. Let's take a look at it.

Employment Goal
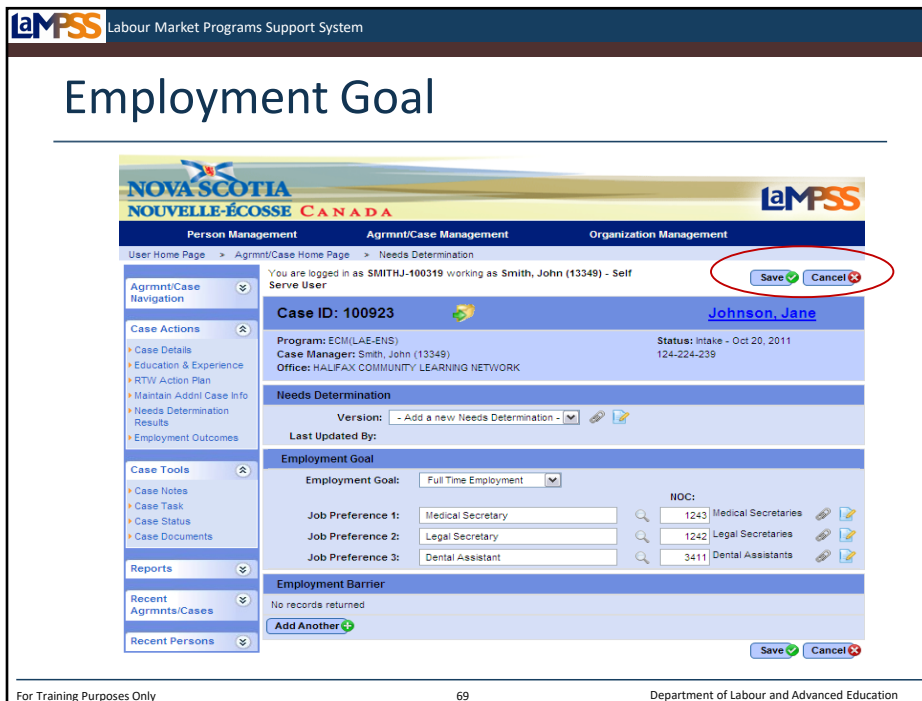
When you first access the needs determination screen all of the fields will be empty. You can access the needs determination screen through the left navigation menu under case actions. *<click to reveal/hide>* In the needs determination section of the screen use the drop-down to select that you are going to add a new needs determination. *<click to reveal>*

In the employment goal section of the screen, select the employment goal you have established with the client. The drop-down will display the three options we discussed on the last slide. *<click to reveal x2>* Once you have selected a goal, you will enter the client's job preferences. LaMPSS allows up to three job preferences to be entered. Look up a NOC code for each job preference by clicking on the magnifying glass. *<click to reveal>*

Launch NOC Search Demonstration

When you click on the magnifying glass a NOC code search popup will appear, as seen here. *<click to reveal>* You can search by NOC code, name or description and the search results will show down below in the bottom section of the popup. *<click to reveal>* When the desired occupation is displayed in the search results, click on the blue, hyperlinked NOC code to add it to the needs determination page. *<click to reveal>*

Here is an example of the employment goal section of the screen that has been completed for our sample client, Jane. *<click to reveal>* Her employment goal is full time employment and she would like to become a medical secretary, although she would be interested in positions as a legal or dental secretary as well. The case manager typed in the name for each job preference and selected the NOC code using the NOC code search.

This screen must be completed during assessment, but can be revisited later in the case management lifecycle if the client's employment goal or job preferences change. To save your progress at any point remember to use the save button at the top or the bottom of the screen. *<click to reveal>*

Employment Barriers
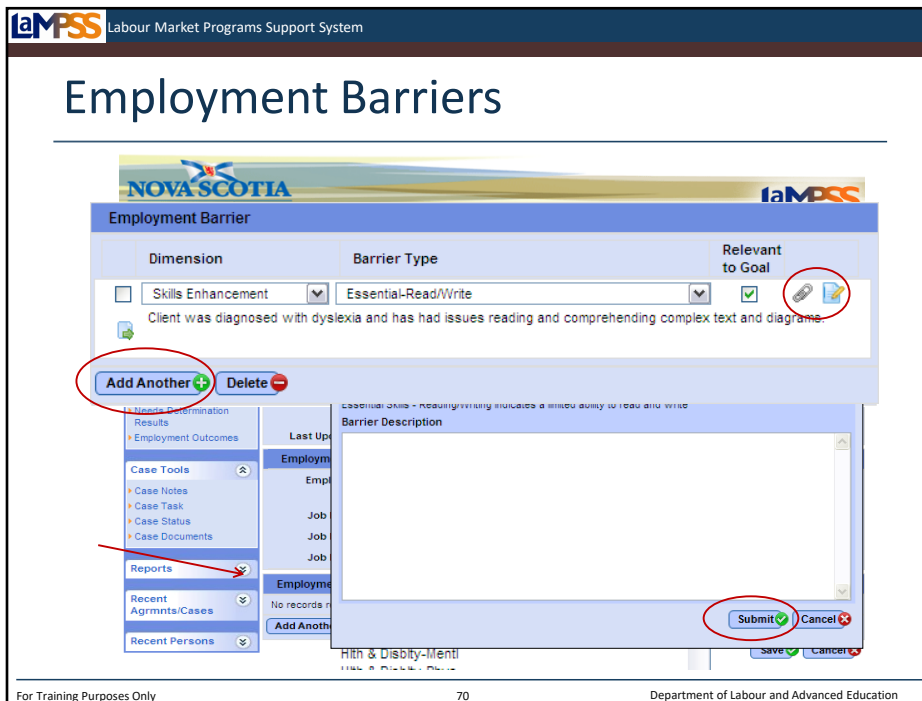
Underneath the needs determination version and employment goal on this screen, you will see a section on employment barriers. *<click to reveal>* This needs determination screen is where you will record all of a client's barriers to employment and indicate whether or not each barrier is relevant to the employment goal specified.

Let's focus in on this section of the screen. *<click to reveal>* You will add a new row, using the add another button, for each barrier to employment you have identified with your client. For each barrier, you will select the employment dimension from a drop down menu. *<click to reveal>* Here you see the four dimensions you are already familiar with: career decision making, skills enhancement, job search and employment maintenance. You will also use a drop down menu to select a barrier type. *<click to reveal>* Some examples are seen here from what is an extremely long list of possible barrier types ranging from age to education to essential skills. *<click to hide>*

Once these are selected, more details can be used by clicking on the icon seen here. *<click to reveal>* This will bring up the barrier description popup. *<click to reveal>* The popup provides a basic definition for the barrier type you have selected and then provides a text box for you to enter information about the client's specific barrier or limitations. Once any pertinent information has been recorded, select submit. *<click to reveal>*

To add additional barriers use the add another button. *<click to reveal>* Any additional notes or any documents related to a specific barrier can be added using the case notes or case documents icon to the right of each barrier. *<click to reveal>*
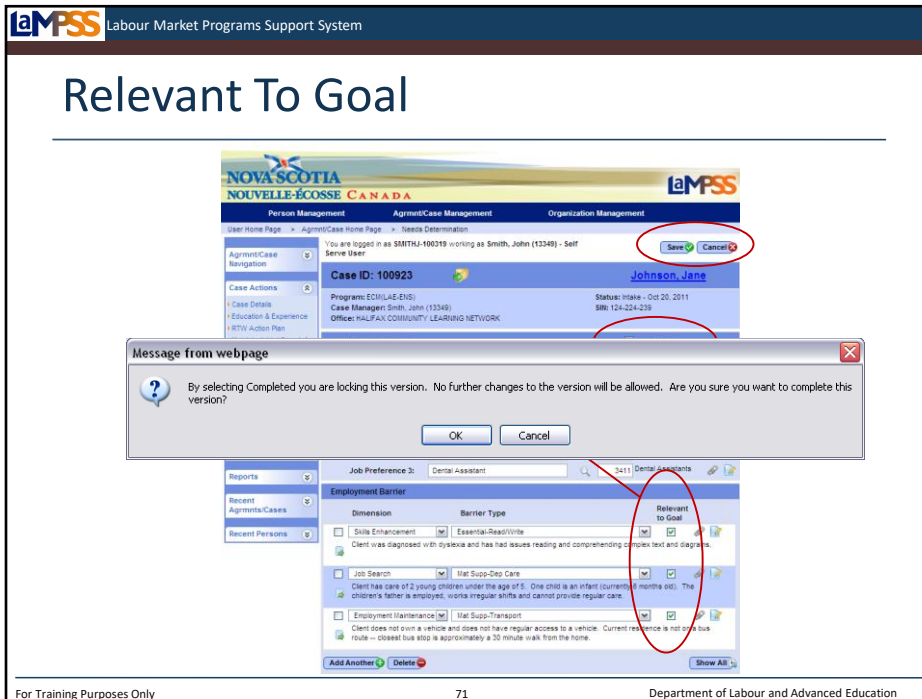
Let's move back to look at the entire needs determination screen. The final part of this screen you should be aware of is the column of checkboxes *<click to reveal>* for you to indicate whether or not each barrier is relevant for the specific employment goal entered in the top section of the screen. *<click to reveal>* Whenever the barrier listed may have an impact on the client's capacity to achieve that employment goal, select this checkbox. If the barrier is not relevant, leave the checkbox unselected. This is simply a means to record the relevancy of the barriers and to share them in the RTWAP with the client and ENS.

When you have completed this version of the needs determination, meaning you have recorded the employment goal, all job preferences and provided details for all employment barriers, you should select the checkbox in the needs determination header to indicate that this version is complete. *<click to reveal>* You will be able to revisit this screen and add new versions of the needs determination as required, but must have marked your first version as complete before you will be able to move on in the case management lifecycle.

Last, but not least, always remember to save your work using the buttons at the top or bottom of the screen. *<click to reveal>* It's a good idea to save periodically as you work on a large page like this one that holds a lot of information. Don't forget, you will be timed out after 20 minutes of inactivity and any unsaved information will be lost!

When you save this screen after selecting the completed checkbox, LaMPSS provides a warning that reads: *<click to reveal>* "By selecting completed you are locking this version. No further changes to the version will be allowed. Are you sure you want to complete this version?". You will select OK to continue or cancel to return to the needs determination.

Exercise – Enter Needs Determination

Even though the last few slides have only reviewed one screen in LaMPSS, the needs determination screen captures a significant amount of information. The information you capture at this point of the case management lifecycle will be vital during the RTWAP development process. Let's move back into LaMPSS and work through the process of selecting an employment goal, entering job preferences, and describing barriers to employment.

Instructor-led Exercise – Enter Needs Determination

Add/Modify Needs Determination
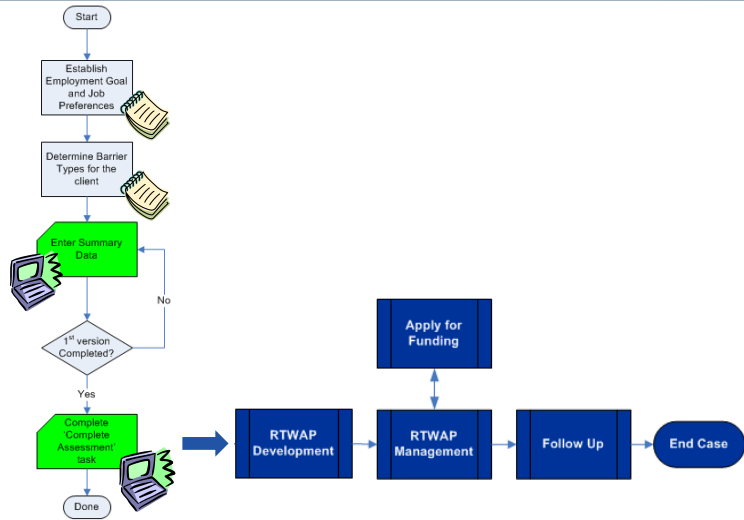
If we return to the steps in the process diagram to add or modify the needs determination, you see here that once the first version is done you will complete the assessment task to move onto the next stage of the case management lifecycle – RTWAP development. *<click to reveal>*

Assessment Task Outcomes

➢ Completed Assessment
- ❑ Case status changes to RTWAP Dev
- ❑ "Develop Action Plan" task created

➢ Self-Serve Only, Group Services Only, Referred Out
- ❑ Case status changes to Closed

➢ Action Planning not Viable
- ❑ Case status changes to Closed

Once again, you can move the case forward in LaMPSS by completing an assessment task. There are several options when completing the task that you will be able to use to reflect what the next steps are for the client.

If the client is going to continue working with you and continue through the case management lifecycle you will select that you have completed assessment. This will move the case forward into the next status. Automatically, a new task will be created to remind you to develop the return to work action plan.

If you determine that the client is only going to access self-serve resources or group services, or you have referred them to another organization, you will close the case by selecting the appropriate outcome for the assessment task. Each of these outcomes will be available from a drop-down menu on the task.

Finally, it is possible that you have completed an assessment of the client, but for one of a variety of reasons moving on the next stage of the case management lifecycle is not a viable option for the client. In this case you can choose an outcome of action planning not viable to close the case directly from assessment. This outcome will also be available from a drop-down menu on the task.

Exercise – Complete Assessment

Let's move back into LaMPSS to move our cases onto RTWAP development by completing the assessment task on our homepages.

Instructor-led Exercise – Complete Assessment Task

Assessment – Next Steps

Completed Assessment

Apply for Funding

New Case → Intake → Assessment → RTWAP Development → RTWAP Management → Follow Up → End Case

- Self Serve only
- Group services only
- Referred Out
- Action planning not viable

End Case
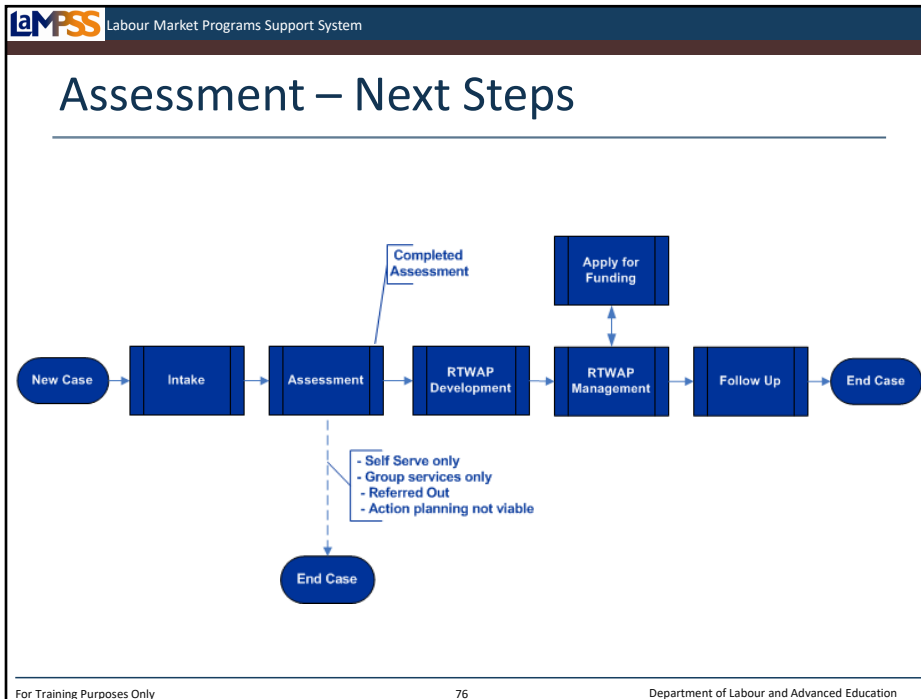
Let's finish up with assessment by returning to the case management lifecycle diagram. *<click to reveal>* This diagram is a great reference for you to use to remember what outcomes are available at each stage and what the next steps are for a client. You will see here, that if you determine the client is only going to access self-serve resources or group services, the case can be closed directly from assessment. Alternately you may determine that action planning is not a viable option for this client and close the case. Each of these outcomes is available as an option when completing the intake task.

The other option, as we've just seen through the exercise, is that the assessment process is complete and the case will move into RTWAP development. *<Click to reveal>* Completing the assessment task to indicate that the assessment of the client and the needs determination are complete will move the case into the next stage of the lifecycle.

Manually Close a Case

Before we move on to look at the return to work action plan, there's a screen in the case tools section of the left navigation menu you may need to use. *<click to reveal>* The case status screen allows you to close a case from any point in the case management lifecycle. You will use this screen when the outcomes on the case task (e.g. Complete Intake, Complete Assessment) do not reflect what has happened on the case.

The case status screen will show the progression of a case through each stage of the case lifecycle. For example, here you can see that the case was created in intake status on October 20th and on October 25th it was moved into assessment. The case manager completed assessment on October 31st and the case entered RTWAP development. If the client commits to the RTWAP the case will move onto assessment. If the client is referred out to another organization or the client does not commit to the RTWAP the case will be closed. Those outcomes are available when the develop action plan task is created. If none of those apply, for example, if the client were to leave the labour force or start a business, the case status screen should be used to close the case. Let's take a look!

To change the status of the case, click the add button seen here. *<click to reveal>* A new row is created at the top of the case status module with a drop down menu for you to select the new status of the case. *<click to reveal>* Once a status (e.g. closed) is selected choose a reason code from the second drop down menu. *<click to reveal>* The case notes icon can always be used in this situation to add additional details to explain why the case is being closed. To complete the process click the save button at the top of the bottom of the screen. *<click to reveal>*

Remember, this case status screen can be accessed throughout the case management lifecycle, but once a case is closed it cannot be reopened for any reason so you should think through these steps very carefully before completing them in LaMPSS!

Agenda

➢ Welcome & Objectives
➢ LaMPSS Refresher
➢ Case Management Lifecycle
  ❑ Intake
  ❑ Assessment
  ❑ RTWAP Development
➢ Enhanced Services
➢ Case Management Lifecycle
  ❑ RTWAP Management
  ❑ Follow Up
➢ Next Steps
➢ Conclusion & Wrap Up

Assuming a case is not closed before this point, the next status the case can move into is called RTWAP development.
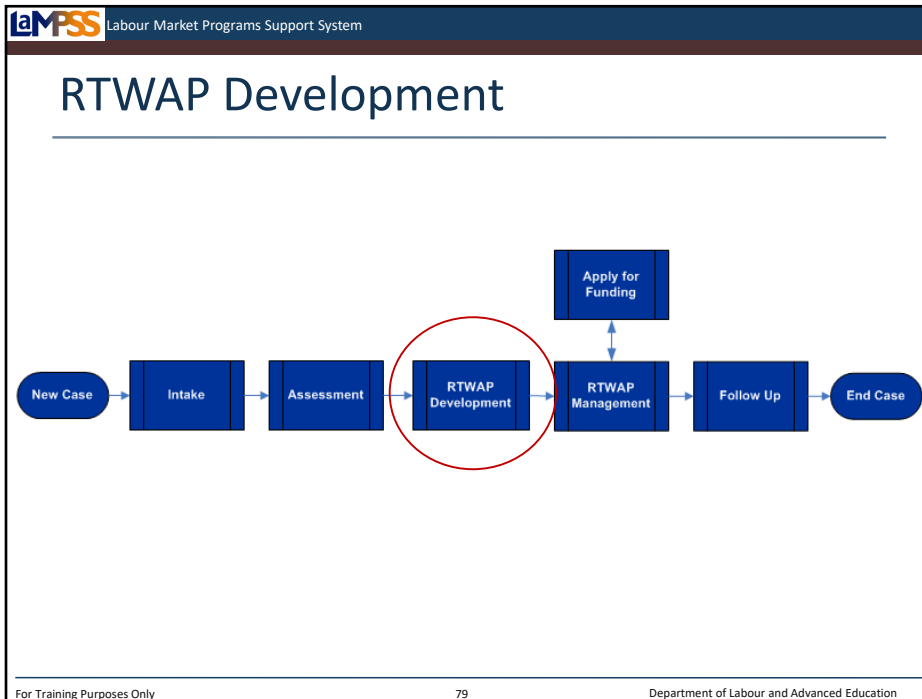
<click to reveal> Hopefully you are starting to see how this case management lifecycle diagram will help you learn the LaMPSS business processes and corresponding case statuses.

Based on the assessment of a client, as in the past, the case manager will continue on to develop a return to work action plan. An action plan is a collection of activities known as interventions that are generally focused on one or more of the client's identified barriers to employment. You will continue to engage with the client to develop the return to work action plan as you have in the past, then the plan will be captured in LaMPSS.

Let's take a look at how you work through action plan development in LaMPSS.

My Task Items

As always, your user homepage is a launching pad for your daily activities and your task items will give you a "to-do list" of sorts for your clients and cases. *<click to reveal>* Your user homepage displays tasks that are due from now to the end of the next month as well as those that are already overdue. The due date for each task is displayed in the far right-hand corner.

As soon as you complete the assessment task in LaMPSS this develop action plan is created. *<click to reveal>* It will appear on your user homepage as well as the case homepage. You can use this task to jump directly to the case screens by clicking on the Agrmnt/Case ID field. Note the due date has been set for two weeks after the task is created. This task will remain on your user homepage during this two weeks and then afterwards, when it becomes overdue.

Develop & Sign RTWAP

Throughout this stage of the lifecycle, you will continue to work with the client. LaMPSS provides you with functionality to add interventions to the action plan as you determine what they will be. Once all the interventions have been added in LaMPSS you can generate an action plan to print, review, and sign with your client. The signed RTWAP does not need to be mailed to ENS. If a funding application is later submitted through LaMPSS it is implied that the case manager has followed the business process outlined here and completed the process of reviewing and signing a RTWAP with the client.

It's entirely possible the needs determination will need to be revisited as the action plan evolves. LaMPSS allows new versions of the needs determination to be entered throughout this part of the case management lifecycle, while maintaining a record of previous entries.
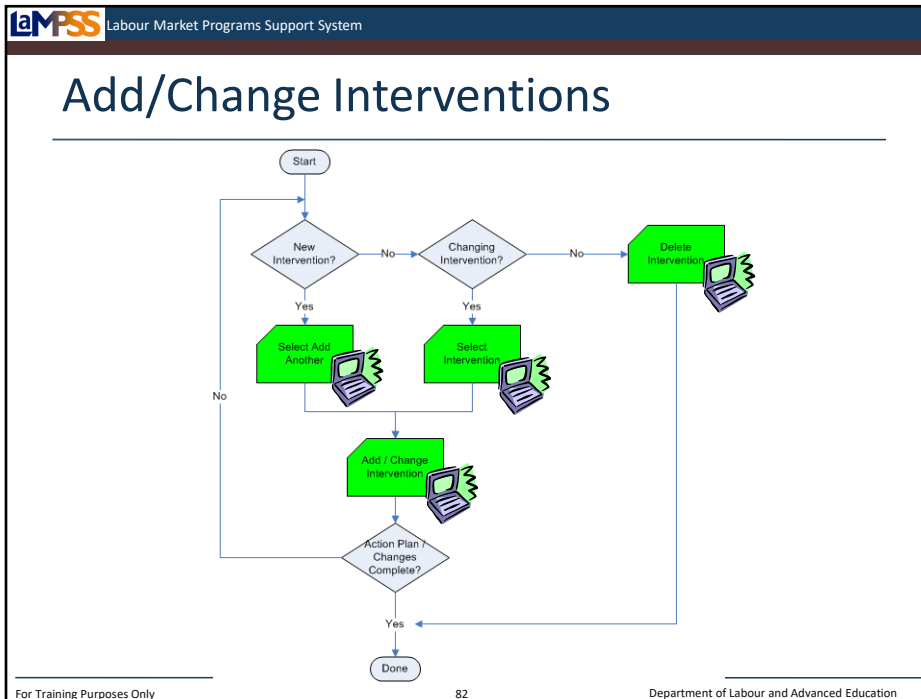
The process diagram seen here shows the steps you will need to follow to add interventions to the action plan in LaMPSS. We'll revisit this process later on in training because the same process can be used to change or update an existing intervention once the case moves into RTWAP management.

Essentially there are three steps to add interventions. First you will select a button on the action plan summary screen to add a new intervention. This navigates you to a screen where you can enter information about the intervention. Finally, you will need to decide whether or not there are more interventions to add.

It's a fairly straightforward process to add interventions. After all, you have already done most of the "thinking" by determining what the interventions will be. Let's walk through an example before moving into LaMPSS for you to practice.

Develop Action Plan

> Client's Identified Needs are summarized in the action plan module

> Click Add Another to add each intervention to the Action Plan

The RTW action plan summary page is accessed through the left navigation menu under case actions. This page allows you to view and maintain a client's return to work action plan.

There are two main sections of this screen:

-Case header

-Action plan

Underneath the action plan header is a line to summarize the client's identified needs. *<click to reveal>* These are drawn from the employment barriers module of the needs determination screen.

The action plan summary will look like this example when it initially loads. To start creating the action plan click the add another button to create an intervention. *<click to reveal>* This button will be used for new each intervention on the action plan.
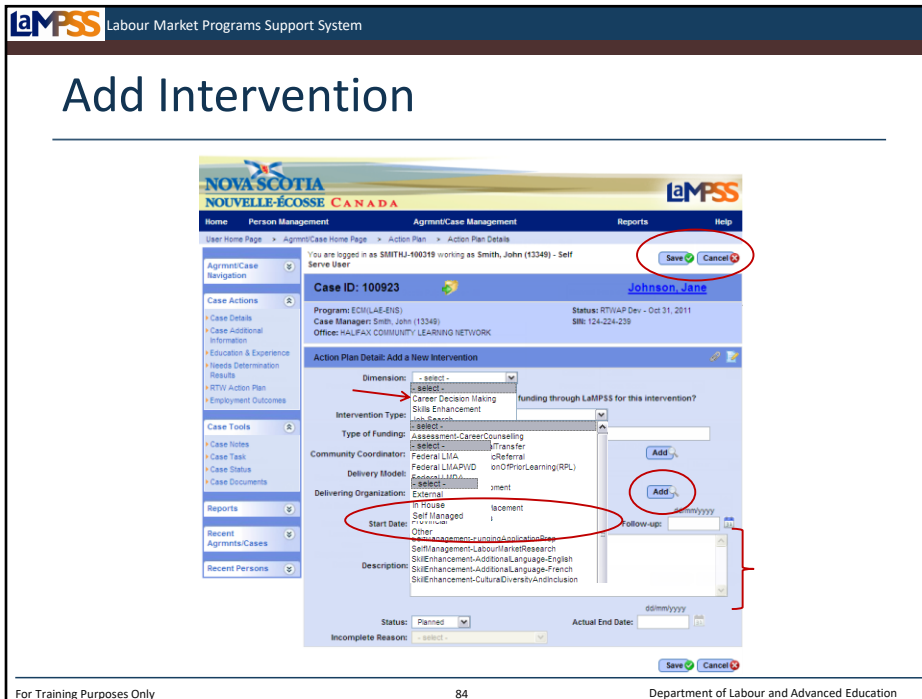
Add Intervention

You will complete this action plan details/add intervention screen for each intervention you want to add to the client's RTWAP. The interventions you add during the process of developing the action plan are a starting point. You can build upon these interventions and add additional ones during RTWAP management.

Let's review the fields on this screen. The first field identifies the employment dimension that the intervention being added will address. *<click to reveal>* You will select an option from the drop-down menu. Then use the checkbox seen here *<click to reveal>* to indicate if there will be an application for funding for this intervention. The next drop-down menu *<click to reveal>* presents a list of all the intervention types for you to select from and then you can select the type of funding from a drop-down menu. *<click to reveal>* It is important to select LMDA from this list to ensure that this case is counted for accountability reporting. There are three possible delivery models for an intervention. *<click to reveal>* An intervention can be delivered externally by another organization, in house by your own organization, or self managed by the client. You will need to indicate what delivery model applies for this intervention.

The planned start and end dates for the intervention will also be added on this screen using a pop-up calendar. *<click to reveal>* These can be adjusted later if the timing of the intervention changes.

A large text box is available for you to enter a description of the intervention. *<click to reveal>* Once you have completed all fields you will use the save button at the top or the bottom of the screen to save the new intervention and return to the action plan summary page. *<click to reveal>*

You may have noticed that we skipped over the two add buttons associated with the community coordinator and delivering organization fields. *<click to reveal>* For these fields, clicking add makes the business partner search module visible. You will be able to search your business partners directly from this screen and add one of them as either the community coordinator or delivering organization for the intervention, when applicable. Let's take a look at this.

Business Partners

➤ A 'rolodex' of Organizations and the services they provide

➤ A Business Partner is selected as the Delivering Organization or Community Coordinator for an Intervention in the Return to Work Action Plan
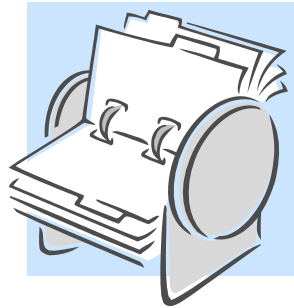
You may recall from the EAS case management lifecycle module that the business partner module in LaMPSS can be thought of as a type of rolodex of organization and their services. Before implementation, each of your organizations published themselves as a public business partner in LaMPSS. This made each service provider visible to other organizations.

Another part of this business partner 'rolodex' are the organizations in your community that you have already established relationships with. Often these organizations are ones that many service providers work with, such as the private career colleges. Other times a service provider may have a private business partner who provides them with exclusive access to certain services or facilities. Employment Nova Scotia has set-up all the public business partners in LaMPSS. These include educational facilities, Self Employment services providers and Community Coordinators.

Each time an intervention is added to the RTWAP, you will have the option to search and select a business partner as the delivering organization or in very specific cases, as the community coordinator. You will click the add button on the action plan details, as we saw on the last slide, to access the business partner search module.

When you click add, the business partner search seen here will appear on the action plan details screen. *<click to reveal>* If you are looking for a business partner you have used recently, be sure to check the list of recent business partners. *<click to reveal>* Otherwise, enter your search criteria and click search. A list of search results, if there are any, will appear and you simply click on the name of the desired business partner to select one. Alternately, you can click close *<click to reveal>* to return to the main action plan details page without selecting a business partner.

Develop Action Plan

Here you see the completed action plan summary for Jane Johnson. *<click to reveal>* Her case manager has followed the steps we've just reviewed to add three interventions, *<click to reveal>* including one for which she will be seeking funding from ENS. *<click to reveal>* We'll be looking at the application for funding process in detail as a part of RTWAP management.

Note that this is one of the few case screens in LaMPSS with no save button. Each intervention is saved individually as it's added.

Delete Intervention

Before we jump back into LaMPSS to practice adding interventions, let's talk about what you will do if you need to delete an intervention. Only interventions with a status of planned can be deleted. Once an intervention is in progress it cannot be deleted from the action plan summary. Select the checkbox next to the desired intervention, or multiple interventions. *<click to reveal>* Once you've made a selection, click the delete button. *<click to reveal>*

A warning message will appear that reads: "Are you sure you wish to delete the selection interventions? Once deleted, this operation cannot be undone." *<click to reveal>* Once you click OK to continue the intervention is permanently deleted from the action plan summary.

Add Intervention(s)
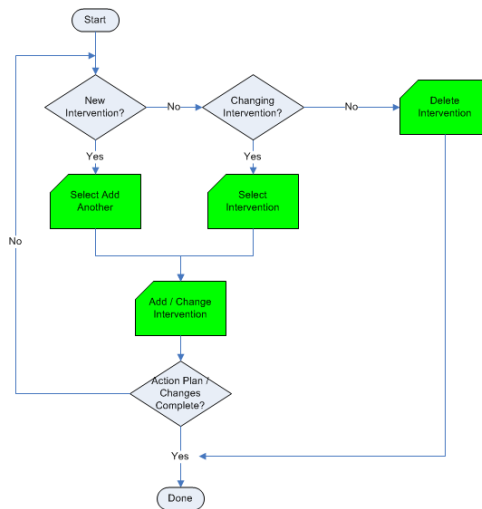
Once you decide if all interventions have been added to the action plan, you are finished with this part of RTWAP development. Next, you will produce the action plan document to review and sign with the client.

If you decide to add more interventions or change existing interventions, simply follow through this same process using the action plan summary and action plan details page, until all interventions have been added and are up-to-date!

Intervention Notifications

As you add interventions to the RTWAP, LaMPSS will start to create notifications for you that will appear on your user homepage. *<click to reveal>* The notifications will appear at appropriate times during RTWAP management to remind you to follow up after each intervention.

A key feature of these notifications is that if you update the end-date for an intervention, LaMPSS will automatically delete the old notification for that intervention and create a new one based on the new end-date!

Exercise – Add Interventions

Let's move back into LaMPSS and work through an exercise together to add interventions to our clients' return to work action plans.

Instructor-led Exercise – Add Interventions

Exercise will require one funded (use SD) and one non-funded to be added, at a minimum!

Review/Sign RTWAP
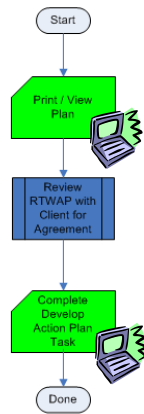
Once all interventions have been determined and added to the action plan, the next steps for case managers are outlined by this process. Basically, you will view and print the action plan and then review it with the client. Assuming the client commits to the plan you will move the case into the next stage of the case management lifecycle by completing a task.

Let's walk through these steps.
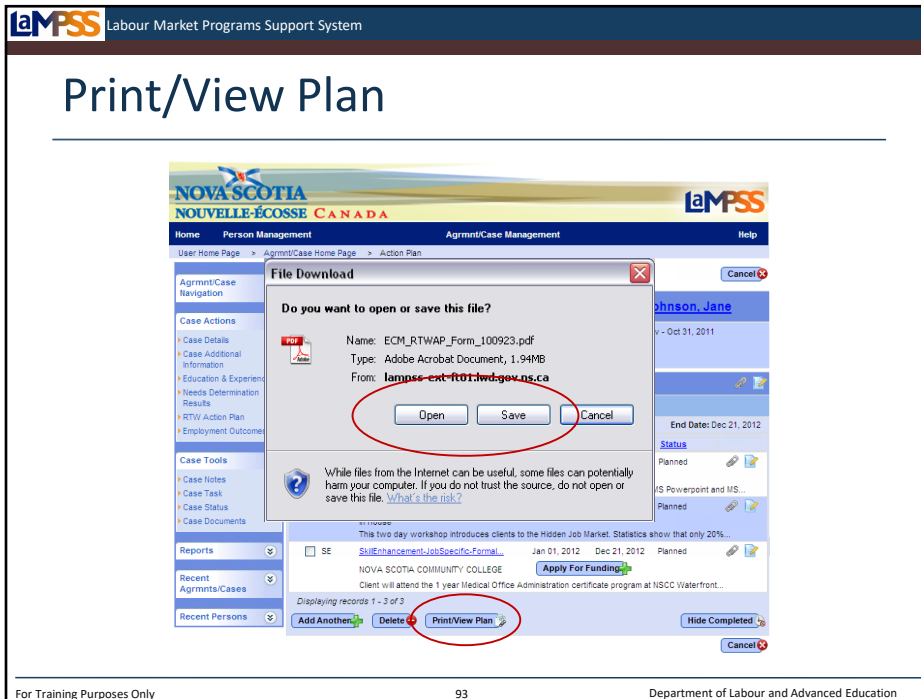
The action plan is generated from the action plan summary screen. Pressing the print/view plan button opens a new browser or Adobe Reader window with the action plan report in PDF format. *<click to reveal>* All of the interventions that have been added to the action plan will be listed in the action plan report.

When the print/view plan button is initially clicked, a file loading icon will appear while the PDF report is generated. *<click to reveal>* When the action plan is ready a file download window *<click to reveal>* will give you the option to open or save the action plan. *<click to reveal>*

An example of the return to work action plan generated from the action plan summary page in LaMPSS is seen here. Relevant details from the person record and the case are pulled into the report such as the case managing organization, client's address, and basic information.

<click to reveal> The action plan section of the report will list each individual intervention as they appear on the action plan summary page. Key information about each intervention is included in this part of the report including the long description of the intervention activities provided by the case manager.

<click to reveal> Finally, the action plan includes a page for signatures. This is where the client commits to carry out the activities and interventions listed in their action plan. The case manager will sign and commit to follow-up with the client to make sure the plan helps them find work.

Once both the client and the case manager have signed the action plan, the case manager can move the case forward into RTWAP management. Please note, the RTWAP will be signed with all clients, regardless of whether or not they will be applying for funding.

Each organization will implement a process for retaining a client's signed action plan; however, ENS has indicated the signed copy should be kept as long as the client's case is open. ENS accepts a scanned copy of this signed document. Please confirm your organization's practice with your manager.

Add/Modify Needs Determination
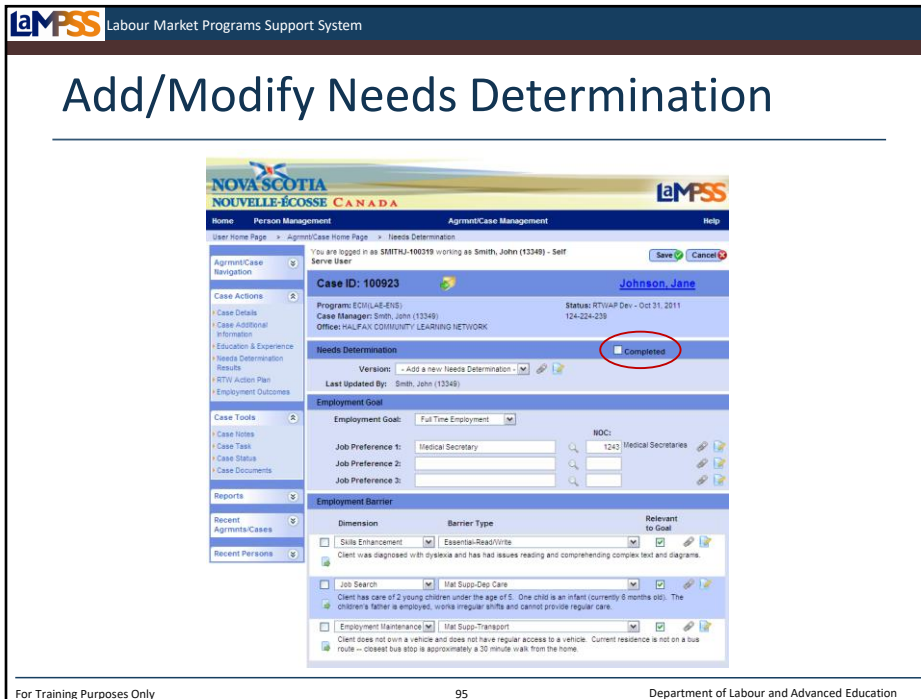
It's also possible that during your review of the action plan with the client, you may find it is necessary to revisit the needs determination. Perhaps the employment goal, job preferences or employment barriers need to be revised before the client can commit to the action plan.

As you learned during assessment, LaMPSS does not prescribe a method or enforce a process for assessing a client's needs. Each service provider will continue to use their expertise and own methods to meet with clients and analyze information to identify their needs. LaMPSS does require, however, that a service provider enter a summary of needs resulting from this process. To enter a new needs determination you will revisit the needs determination screen we looked at earlier and follow the same steps.

In the needs determination module of the screen, seen here, select that you are adding a new version of the needs determination. *<click to reveal>* The needs determination screen will be refreshed, but some information is maintained such as the employment goal, the first job preference, and the employment barriers. *<click to reveal>* The information can be updated and when you are finished working with the client on the new needs determination you will mark this version as complete. *<click to reveal>*

With an updated needs determination you can revisit the action plan summary and determine if changes are required to any of the interventions previously added, or whether new interventions should be added, before reviewing the action plan with the client.

ENS requires a new copy of a RTWAP to be signed and maintained if there are significant changes or if you are adding a new funded intervention.

Exercise – Print/View Plan

Let's move back into LaMPSS to generate the action plans for our clients. We'll take some time during this exercise to review the action plan in a bit more detail.

Instructor-led Exercise – Print/View Plan

Develop Action Plan Task Outcomes

➤ Developed & Signed
- ❑ Case status changes to RTWAP Mgmt
- ❑ "Close Action Plan" task created

➤ Referred Out
- ❑ Case status changes to Closed

➤ Client not Committed
- ❑ Case status changes to Closed

After the action plan has been signed by both the case manager and the client, RTWAP development is complete. Once again, LaMPSS will require that you complete a task to move the case forward in the case management lifecycle. There are several options when completing the develop action plan task that you will be able to use to reflect what the next steps are for the client.

If the client has committed to the return to work action plan and will continue working with you through the case management lifecycle you will select that you have developed and signed the action plan. This will move the case forward into RTWAP management. Automatically, a new task will be created and sit in the background until it is time to close the action plan. We'll talk more about this later.

If you determine during the process of developing the action plan that the best course of action is to refer the client to another service provider, you can change the case status to closed by choosing that outcome for the develop action plan task.

Finally, it is possible that you finish developing the action plan but, for one of a variety of reasons, the client does not commit to the action plan. This outcome is also available on the develop action plan task and will move the case to a closed status.

Exercise – Complete RTWAP Dev

Let's move back into LaMPSS to move our cases onto RTWAP management by completing the develop action plan task on our homepages.

Instructor-led Exercise – Complete RTWAP Dev Task

RTWAP Dev – Next Steps
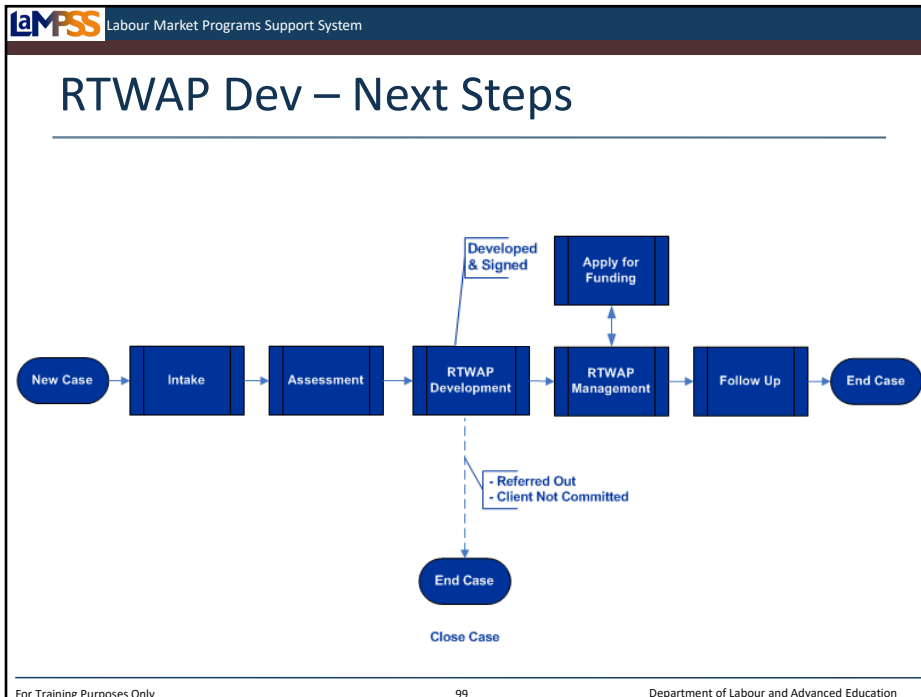
Let's finish up RTWAP development by returning to the case management lifecycle diagram. *<click to reveal>* You will see here, that if you determine the client should be referred to another organization, the case can be closed directly from this status. Alternately, the case can be closed if the client does not commit to the action plan.

The other option, as we've just seen through the exercise, is that the action plan has been developed and the case will move into RTWAP management. *<click to reveal>* Completing the task to indicate that action plan has been developed and signed will move the case into the next stage of the lifecycle.

Agenda

- ➤ Welcome & Objectives
- ➤ LaMPSS Refresher
- ➤ Case Management Lifecycle
  - ❑ Intake
  - ❑ Assessment
  - ❑ RTWAP Development
- ➤ Enhanced Services
- ➤ Case Management Lifecycle
  - ❑ RTWAP Management
  - ❑ Follow Up
- ➤ Next Steps
- ➤ Conclusion & Wrap Up

The next stage of the case management lifecycle is RTWAP management. The client has now moved through an intake process, their needs and employment goals have been established, the RTWAP is developed and now it's time to start executing that plan.

Enhanced Services
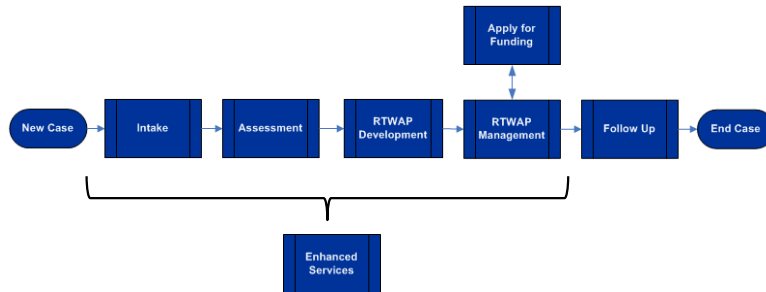
As you learned in the EAS case management lifecycle webinar, LaMPSS provides the ability to manage group services as well as individual interventions delivered by your organization. Managing enhanced services includes things like scheduling sessions, registering participants, and tracking participation.

Clients may access enhanced services throughout the case management lifecycle during intake, assessment, RTWAP development and management; however, workshops exceeding a full day in length are only available to clients whose RTWAP indicates a need for the service. These workshops require a signed RTWAP.

Enhanced Services

➤ What happens in Enhanced Services?

The term enhanced services means the services each organization provides to clients in an individual or group setting. Individual services are ones the organization provides on a one-to-one basis such as job development. Group services are workshops the organization sets up to provide a session in a specific subject matter for clients, such as a resume writing workshop. These services are those that your organization has included in your EAS agreement with ENS.

LaMPSS includes an enhanced services module for you to use to manage these group and individual sessions. Participants can attend services offered by the EAS provider they are working with or those offered by another organization in the EAS community. All of this can be tracked electronically in LaMPSS.

Enhanced Services

➤ Each organization has assigned an enhanced services role to certain staff who:
  ❑ Enter details of enhanced services
  ❑ Maintain schedule

➤ Enhanced services have a visibility of either **public** or **private.**

➤ Case Managers identify enhanced services for clients and register them as participants.

Your organization has assigned an enhanced services role to certain staff. Staff with this role are responsible for entering descriptions and scheduling each group or individual service provided by your organization.

In some cases the visibility for the enhanced service will be set to private—in this case that enhanced service and its schedule will only be visible to staff within your organization. In other cases, the visibility for the enhanced service will be set to public. This means that other service providers in the EAS community will be able to view the details of your enhanced services schedule. Likewise, you will be able to see the enhanced services offered by other EAS providers through LaMPSS.

The role of the case manager is to identify the appropriate enhanced services for your clients and register them as participants.

To review how to register participants in an enhanced service let's work through a few examples.

Enhanced Service Search
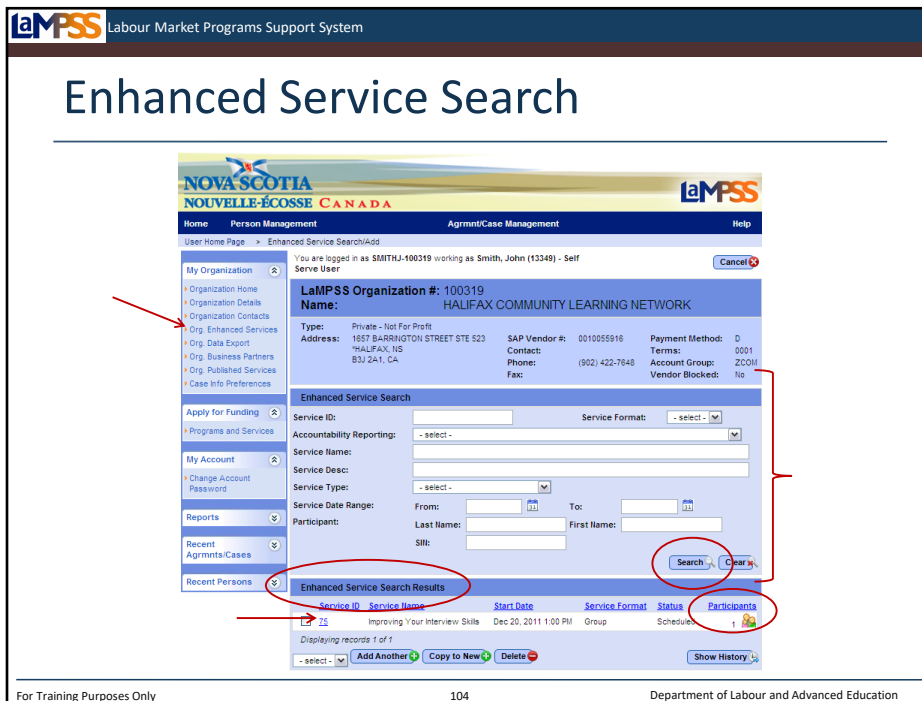
To access the enhanced services search module you will start from your user homepage and navigate to your organization homepage. In the left navigation menu of the organization homepage select the organization enhanced services screen. *<click to reveal>*

The enhanced services search page will appear. By default, all of your organization's enhanced services will be listed in the enhanced service search results. To narrow down the list of results, especially since some organizations will offer dozens of enhanced services, enter your desired search criteria in the enhanced service search section of the screen. *<click to reveal>* You can search by:

-Service Id

-Service Format

-Accountability Reporting

-Service Name

-Service Description

-Service Type

-Service Date Range

-Participant information

When you select search*<click to reveal>* the enhanced service search results will be narrowed down based on your criteria. *<click to reveal>*

To view detail information about a service such as the full description, primary audience, location and additional details click on the blue, hyperlinked service ID in the first column. *<click to reveal>*

To view, modify or add participants to the service, click the participant icon seen here. *<click to reveal>* You will be taken to the enhanced service participants page.

Enhanced Service Participants
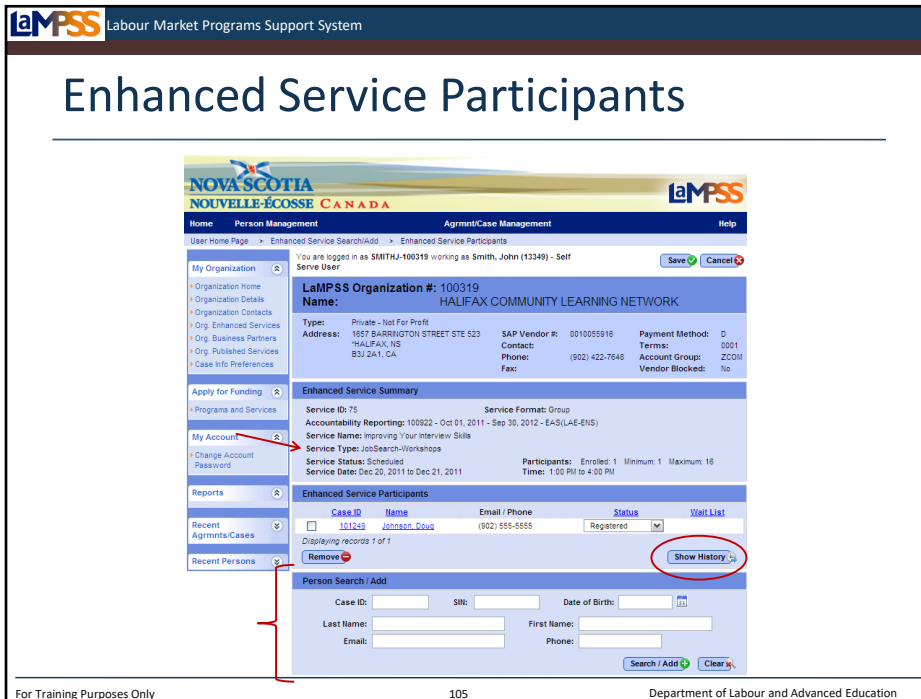
Each group enhanced service scheduled by your organization will have its own enhanced service participants page. This page allows you to add participants. There are three main sections on this screen: enhanced service summary, enhanced service participants, person search/add. In order to add participants to an enhanced service the status, in the summary section of the screen, must be scheduled. *<click to reveal>* Participants cannot be added to a service with a status of completed or cancelled.

The enhanced service participants section of the screen displays participants who have already been added. The show history button *<click to reveal>* in this section of the screen can be used to see participants who were added but either did not show, were rescheduled, or cancelled.

Participants must have an open case to be added as a registered participant in a service. To search for a client to add as a participant, enter information in the person search/add section of the screen. *<click to reveal>* You can search by: Case ID, SIN, date of birth, last name, first name, email and phone. If your search criteria are specific enough to yield a single person and the search included either a case ID or SIN, that person will automatically be added to the list of participants.   LaMPSS will also make sure you don't accidentally add the same person twice!

Enhanced Service Participants
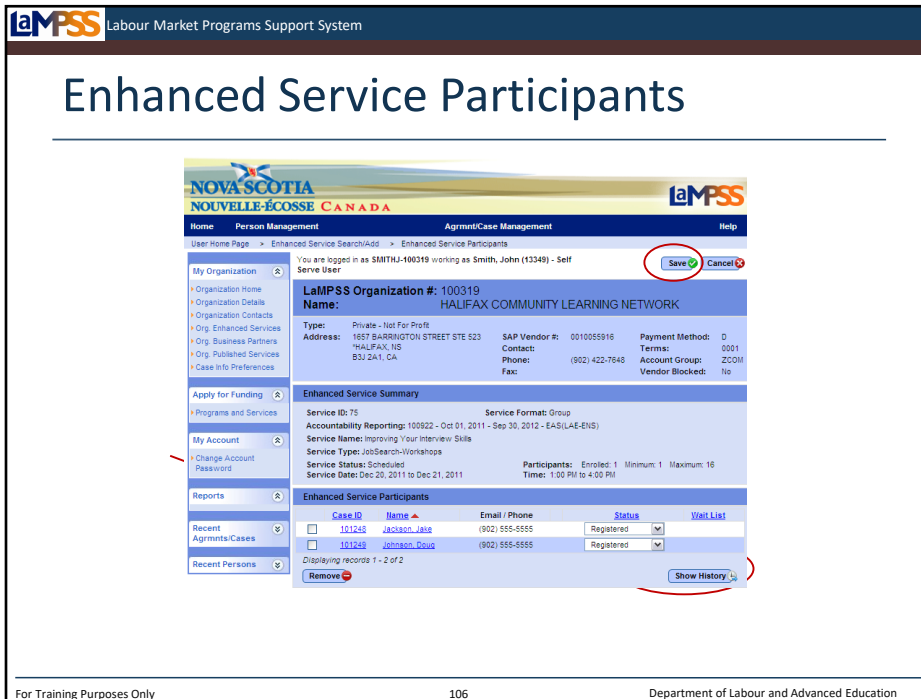
If the search criteria did not include a case ID or SIN, or there are multiple results, the search results will be listed at the bottom of the page as seen here. In this example, the case manager searched for a person with the last name Jackson. *<click to reveal>* The search results show one result, a client named Jake Jackson. *<click to reveal>*

After completing the search, review the search results for the participant you want to add. Key information including name, SIN, address, phone, and date of birth is displayed to help you determine the appropriate person to select. Click the green plus sign to the left of the desired person record to add them as a participant in the enhanced service. *<click to reveal>*

If the desired participant is not in the list of search result, it is possible that you have not yet created a person record and a case for the client. You can use the add new participant button seen here to add a participant to the service in a pre-registered status. *<click to reveal>* We'll take a look at this next.

Otherwise, once you select the icon to add the participant, their name will appear in the list of enhanced service participants. *<click to reveal>* You will need to save this screen to complete the process of adding a participant. *<click to reveal>*

Adding a Pre-Registered Participant

➤ A person can be added to an enhanced service in a **Pre-Registered** status.

➤ Registration requires a LaMPSS Person ID and a LaMPSS Case ID.

➤ Case Manager will add the person as **Registered** once the Case is created.

A person can also be added to an enhanced service in a pre-registered status. If a client does not have a person record or a case, they can be added to an enhanced service using this function.

Once the case manager completes the case intake process and opens a case in LaMPSS, the client can be registered and the pre-registration will be removed.

Let's look at an example!

Adding a Pre-Registered Participant
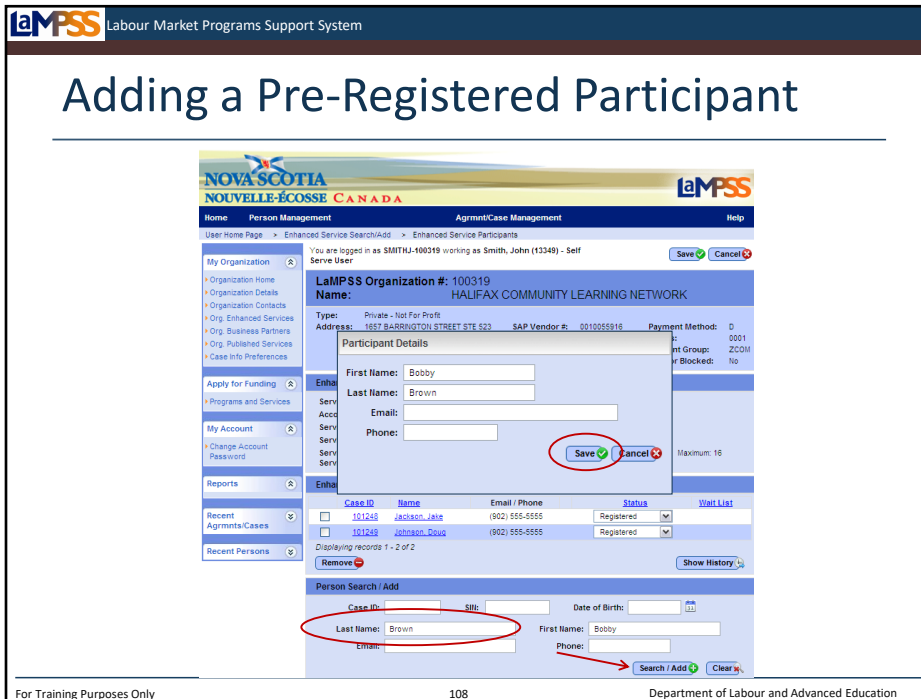
Here you see we are searching for another participant to add to this enhanced service. The search is by the client's last name, Brown. *<click to reveal>* Click the search/add button in the bottom corner of the screen. *<click to reveal>*

When no person records match the search criteria, LaMPSS will display a popup reading: *<click to reveal>* "No persons matched the search criteria. Do you want to add a person with "pre-registered" status?" Select OK to continue.

A participant details popup is displayed with the relevant details pre-populated with the details entered in the person search. *<click to reveal>* Complete the data entry of the person's first name, last name, email and phone number then click save. *<click to reveal>* The person is added as a new participant of the enhanced service with a status of pre-registered.

Registering a Pre-Registered Participant

For Training Purposes Only   109   Department of Labour and Advanced Education
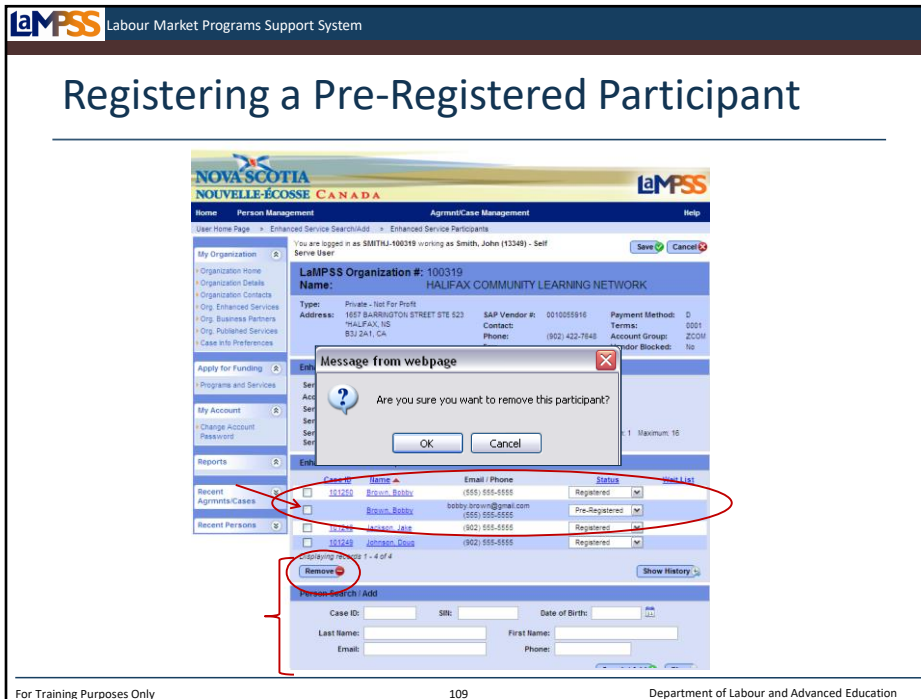
To change a participant to registered from a pre-registered status, they must now be a registered LaMPSS person and have an open case. You will navigate to the enhanced service participants page where you will see the participant listed as pre-registered. *<click to reveal>* You will actually follow the steps we've just learned to search for and add the participant to the enhanced service, this time with a status of registered. *<click to reveal>* The easiest way to do this is to search by case ID!

Once you have added the person as a registered participant, you will see two instances of that person in the list. *<click to reveal>* You will delete the record with a status of pre-registered by selecting the checkbox *<click to reveal>* in that row and clicking delete. *<click to reveal>*

LaMPSS will ask you to confirm that you want to remove the participant. *<click to reveal>* Select OK to complete the process. You have successfully changed a pre-registered participant to a registered status!

Wait Lists

➢ Each Enhanced Service has a minimum and a maximum number of participants.

➢ Once the maximum number of participants are registered, any additional clients added will be in Wait List status.
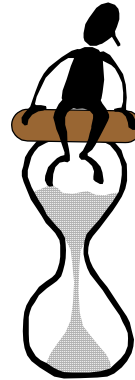
Finally, let's talk about wait lists for an enhanced service. Each enhanced service is set up with both a minimum and a maximum number of participants that can be enrolled. When an enhanced service reaches its maximum number of participants, users can continue to add people to that service but they will have a status of wait list and be assigned a wait list number. This functionality allows an organization to track the clients waiting for an enhanced service!

Let's take a look!

Adding a Participant to the Wait List
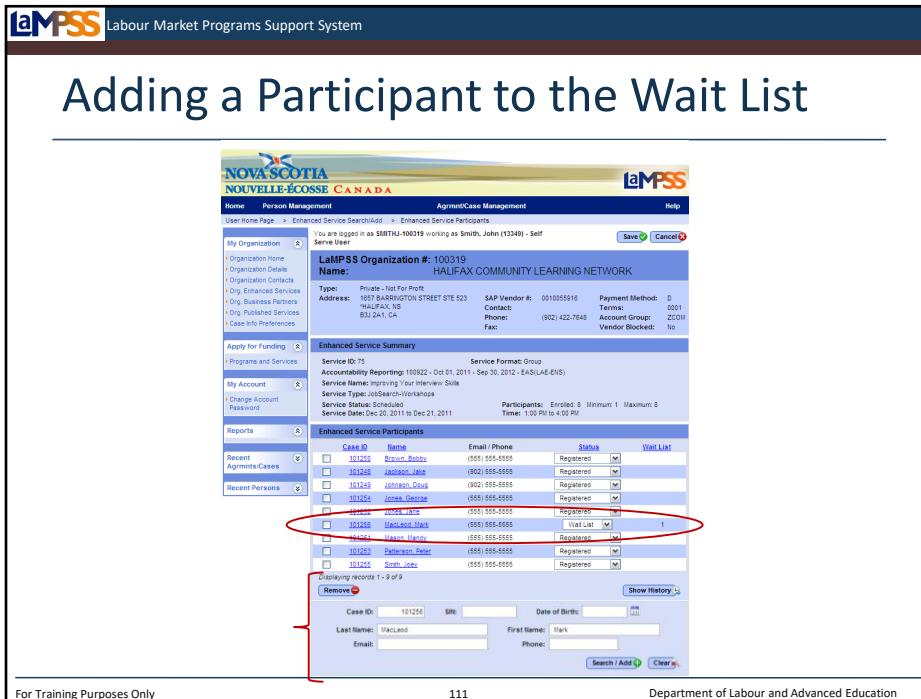
Here we see that our enhanced service had a maximum number of participants of 8. *<click to reveal>* Since 8 participants are currently registered, the service is full! To add a participant to the wait list, you will follow the usual steps to search and add a participant. *<click to reveal>*

When you select a participant in the search results, however, a popup window will appear reading: *<click to reveal>* "Maximum number of participants for this enhanced service has been reached. Do you want to add a person with wait list status?" If you select OK, you will see here the participant is added to the list of enhanced service participants; *<click to reveal>* however, they are in a wait list status.

In addition, since this is the first participant who has been added to the wait list, their wait list number is one. The participants will be numbered in the order they are added to the enhanced service.

Once a participant is on the wait list, it is very simple to add them as a registered participant if a spot becomes available. For example, if a participant who was registered is removed from the enhanced service, a wait listed participant can take their place. Let's take a look!

Here you see the list of participants for this enhanced service. The only participant on the wait list is Mark MacLeod. *<click to reveal>* Another participant has decided not to take this workshop, and is being deleted from the list. *<click to reveal x2>* The case manager will be asked to confirm that they wish to remove the participant *<click to reveal >* , and then LaMPSS will display a message reading: *<click to reveal>* "The number of registered participants is now below the maximum allowable. There are participants with "wait list" status that you may want to change to "registered". While LaMPSS doesn't automatically switch their status to registered, it will remind you that space is now available!

<click to reveal> In the list of participants, locate the participant you want to register. *<click to reveal>* If there are multiple participants on the wait list, you can use the wait list number to determine who the next person "in line" is for the service. Click the status drop-down menu. *<click to reveal>* Since there is now space available, registered will appear as an option. *<click to reveal>* Choose registered and save!

Individual enhanced services are ones your organization provides on a one-to-one basis such as job development. You will use the same enhanced service screens to manage these individual sessions.

<click to reveal> One key difference between group and individual services is that for individual services, you will use LaMPSS to record meetings with the client. For group services you use LaMPSS to manage registration and participants. Since individual enhanced services only have one participant the information we've reviewed on pre-registration, registration and wait lists doesn't apply. It is extremely important to record each and every meeting in LaMPSS!

Just as you will for a group enhanced service, you will access the enhanced services search module in the left navigation menu of the organization homepage. By default all of your organization's services will be listed in the enhanced service search results. You can narrow down the list of results to display only individual enhanced services by selecting a service format of individual before conducting a search.

Like you did for group enhanced services, you will then select the participant icon to navigate to the enhanced service participants page. Here's the difference – for group services you were adding participant names to an already scheduled session on a specific date at a specific time. *<click to reveal>* For individual services, you add participant names and then select the date the session occurred, as seen here. *<click to reveal>* Once you've used the person search/add to find the client you will select you met with them and choose a status of completed (or did not complete in some situations).

For example, Jake's case manager has been working through a series of job development activities with him. They have met on three different occasions so the case manager will record each one of those meetings in the enhanced service module. *<click to reveal>* This ensures that each of these sessions "counts" towards your organization's activities in the EAS activity report. You see here what

this would look like on the enhanced service participants page in LaMPSS.

Enhanced Services & Business Partners
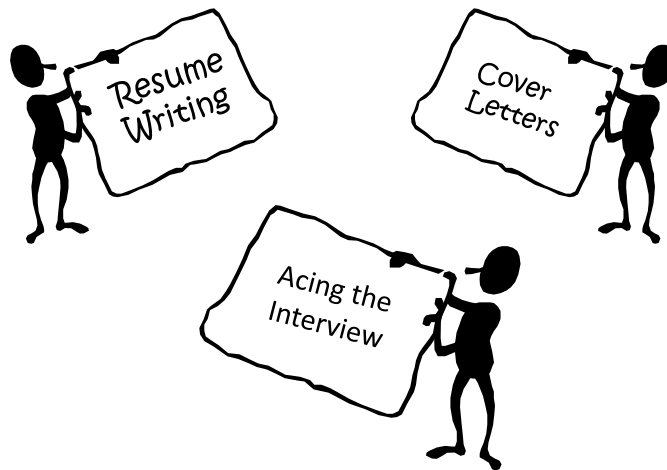
So far we've only looked at the enhanced services offered by your own organization. As you know, however, one main benefit of LaMPSS will be the ability to see services offered by other EAS providers in your community.

Your clients can attend enhanced services offered by other organizations. Likewise, other organizations can refer clients to an enhanced service offered by your organization. All of this can be tracked electronically using the LaMPSS enhanced services module.

Let's look at some examples!

Business Partner Search
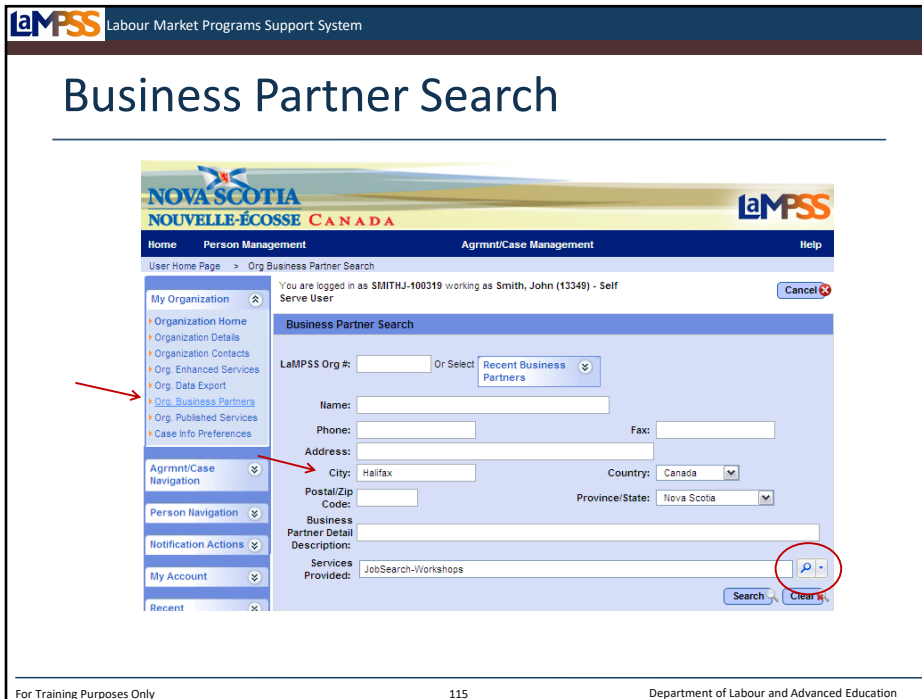
To find other organizations and view what services they provide, you will engage with the business partner module in LaMPSS. To access the business partner module you will start from your user homepage and navigate to your organization homepage. In the left navigation menu of the organization homepage select the organization business partner screen. *<click to reveal>*

You can search any private business partners your organization has entered as well as all the public business partners that Employment Nova Scotia has added to the registry. EAS providers are included in this list of public business partners.

To do a business partner search you will enter criteria such as name, city, or even search by services provided. Here you see the search is being conducted for business partners who offer workshops in the city of Halifax. *<click to reveal x2>* Click search to display the results.

Business Partner Search

The business partner search results at the bottom of the page will display any business partners meeting the selected criteria. Here we see that an organization called HRDA Enterprises that offers workshops. *<click to reveal>* To view more details about their services click the icon seen here *<click to reveal>* to access the services provided popup. *<click to reveal>*

If the organization offers any public enhanced services, the schedule will be listed in the services provided popup. In this example, we see that HRDA Enterprises currently has three enhanced services scheduled. *<click to reveal>*   Details displayed include the enhanced service name, start date, end date, maximum seats, and location.

From this point, for additional details you will contact the business partner outside of LaMPSS.

Selecting a Delivering Organization

Now that you have found another organization through the business partner search that offers a service you would like your client to use, you will use LaMPSS to "share" select person and case information with that business partner.

By sharing some information, the organization providing the service will not have to create a new case for the client. Instead, once you have given that organization access, they will be able to see enough of the client's person and case information to register them in the service! As the case managing organization, you hold the keys to the clients case and person record. Another service provider will not be able to see the information until you make it available!

Let's review how you would do this.

Selecting a Delivering Organization
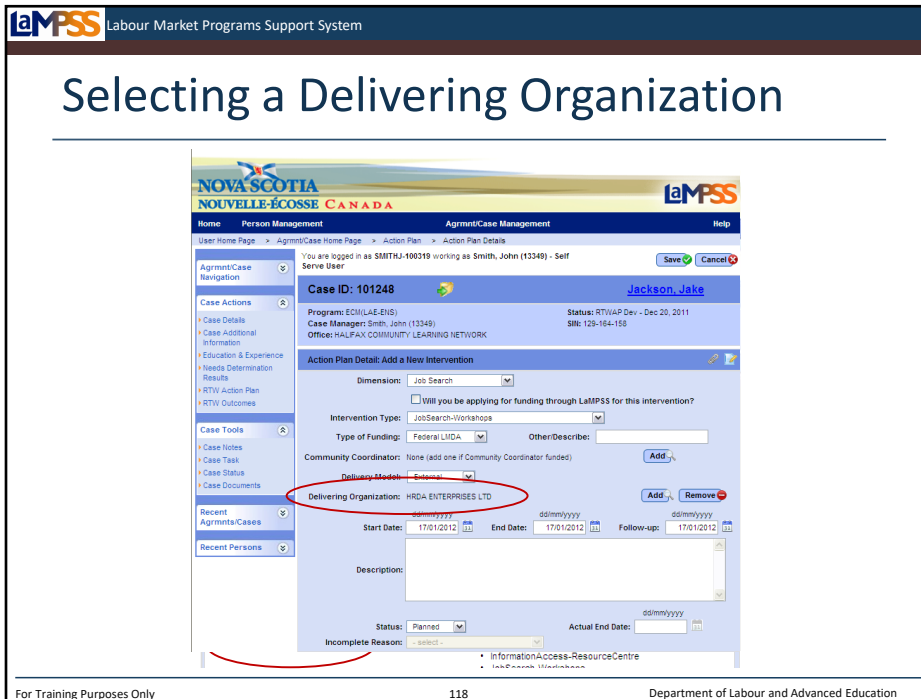
In LaMPSS, you will navigate to the client's case. On the RTW action plan page navigate to the action plan details page seen here for the intervention the client will be attending at another organization. Here we see the action plan details page for a client named Jake Jackson who has a job search workshop in his action plan.

When this intervention is initially created, delivering organization field is empty. *<click to reveal>* You will select a delivery model of external from the drop-down menu and then click add to access a business partner search. *<click to reveal>* The business partner search is very similar to the one we reviewed earlier.

<click to reveal> Use the business partner search to find the organization delivering the service that the client will participate in. Click on the name of the organization *<click to reveal>* to select it and return to the action plan details page. *<click to reveal>* The organization you selected now appears as the delivering organization for this intervention. *<click to reveal>* Click save.

Following these steps will share this person record and case with the delivering organization.

Selecting a Delivering Organization

As you can see in the action plan summary, the delivering organization you identified is now associated with this intervention. This means that when you or your client contact this organization about the workshop, they will be able to find your client's person record in LaMPSS when they do a person search. The case, however, remains with your organization.

Please note once you share this client with the organization you cannot reverse the process!

Enhanced Services
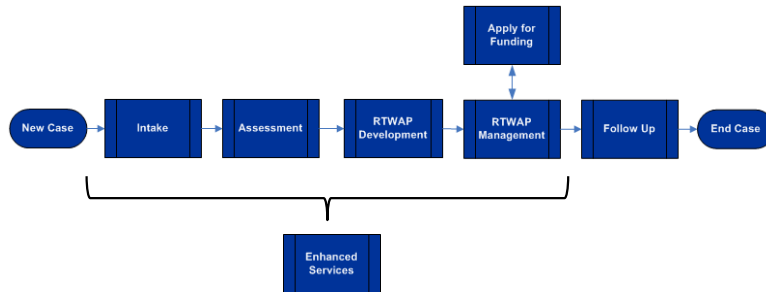
Since clients can access enhanced services from various points in the case management lifecycle, you will be using this module frequently as you interact with your clients.

Now let's continue on with the rest of the case management lifecycle. You'll recall that we left off after we completed RTWAP development by developing and signing the client's action plan.

The next stage of the case management lifecycle is RTWAP management. The client has now moved through an intake process, their needs and employment goals have been established, the RTWAP is developed and now it's time to start executing that plan.
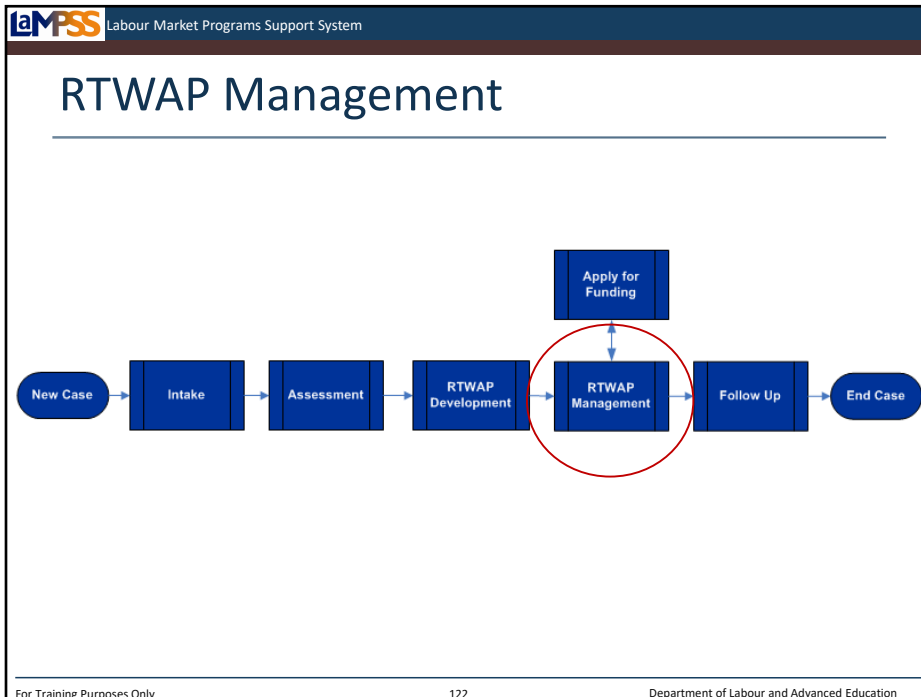
RTWAP management is the status the case will be in while you assign interventions from the action plan and monitor the client's progress through those interventions. *<click to reveal>*

This stage of the lifecycle can include a variety of activities, including:
-Revision of the needs determination (employment goal, job preferences)
-Participation in enhanced services
-Application for funding

We'll start by looking at how to initiate an intervention in LaMPSS and then review, in turn, how to apply for funding, register a client in enhanced services and monitor both those interventions and any others that may be ongoing during RTWAP management. We'll also look at how to add additional interventions.

Once the action plan is developed and signed you will work with your client to begin the first one, or few, interventions and record which ones have been started in LaMPSS. As you know, just because assessment and the development of the action plan is done, it does not mean you are done working with and meeting with the client.

You will continue to use your professional expertise and judgment to support each client through their action plan. LaMPSS will help you throughout RTWAP management by making it easy to track which interventions have been started and how they're progressing. LaMPSS will also alert you at key points when you will want to contact a client to follow up on a specific intervention.

The first step in LaMPSS during RTWAP development is to update the intervention(s) the client will be starting right away. In RTWAP development, all interventions are setup in 'planned' status. As the client actually begins each of those interventions you will update the status to 'in progress' using the action plan details page.

The first step, seen here, is to determine what intervention(s) the client will begin. Then you will move into LaMPSS to make the necessary updates. Let's take a look!
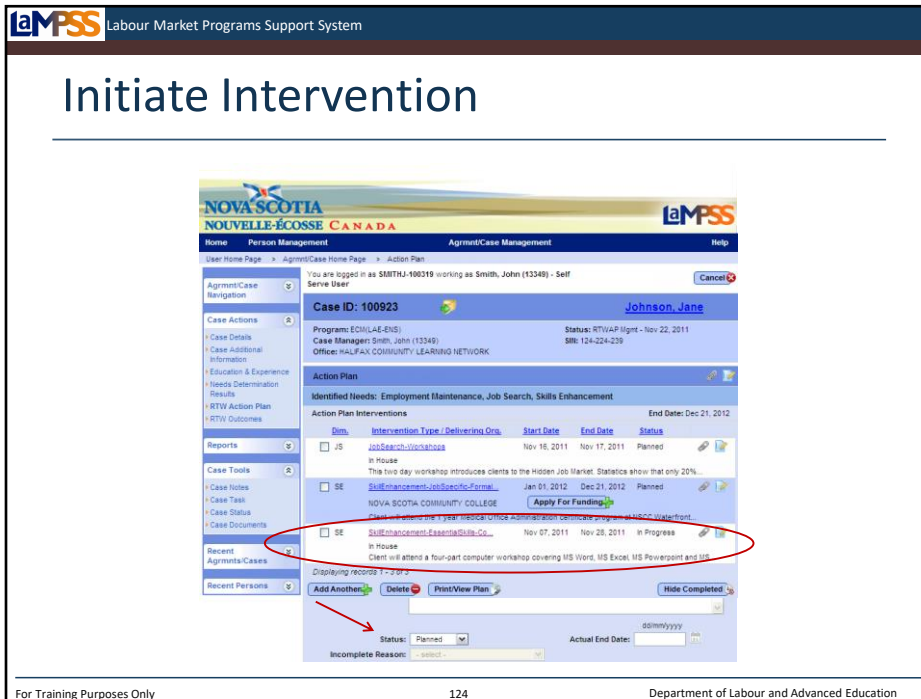
Here is an example of the RTWAP page which we have already used to develop the action plan. From this page, click on the name of the intervention that the client is going to start. *<click to reveal>* This will link back to the action plan details page for that intervention. *<click to reveal>*

Near the bottom of the action plan details page there is a drop-down menu *<click to reveal>* that allows the status to be updated to:

-Planned

-In progress

-Completed

-Incomplete

Select in progress. Also note other details can be adjusted if necessary such as the start date, end date, or detailed description.

Once all updates are made, including the change to in progress, save the screen. *<click to reveal>* You will be returned to the action plan summary page *<click to reveal>* and the intervention will now show as in progress. *<click to reveal>*

Exercise – Initiate Intervention

Let's move back into LaMPSS and initiate one of the interventions in our sample client's action plan.

Instructor-led Exercise – Initiate Intervention

User Home Page

- Launching pad into a Case Manager's daily activities

- Action Required notifications are automatically generated for every intervention

NOVA SCOTIA
NOUVELLE-ÉCOSSE CANADA

Home   Person Management   Agrmnt/Case Management   Help

User Home Page

You are logged in as SMITHJ-100319 working as Smith, John (13349) - Self Serve User

My Organization
› Organization Home

Agrmnt/Case Navigation

Person Navigation

Business Partner Navigation

Notification Actions

My Account
› Change Account Password

Recent Agrmnts/Cases

Broadcast Messages

Display an Agreement/Case
Agrmnt/Case ID: [   ]   Display

My Task items Due (now to the end of the next month)/Overdue
No task items returned

My Notifications Due (now to the end of next month)/Overdue

P	Type	Agrmnt/Case ID	Org/Player	Program	Created By	Due Date
	Action Required	100923	Johnson, Jane	ECM (LAE-ENS)	SMITHJ-100319	Nov 17, 2011
	Progress check with Jane Johnson in regards to intervention: JobSearch-Workshops with a start date of 2011-11-16					
	Action Required	100923	Johnson, Jane	ECM (LAE-ENS)	SMITHJ-100319	Nov 28, 2011
	Progress check with Johnson, Jane in regards to intervention: SkillEnhancement-EssentialSkills-ComputerUse, with a start date of 2011-11-28					

Your user homepage will continue to be a great launching pad into your daily activities because notifications on your user homepage will show you when it's time to follow-up on each intervention that is in progress. *<click to reveal>* These notifications replace the BFs or bring forwards in Contact IV that you have used in the past. The text of the notification will tell you which specific intervention for that client requires follow up *<click to reveal>* and clicking on the action required hyperlink will take you directly to the action plan details page for that intervention.

In this example you see that a progress check with Jane Johnson about her computer use intervention is due on November 28, 2011. These notifications will appear within one month of their due date and remain on the homepage if they are overdue until the case manager actions this item.

If you updated the dates for an intervention, don't worry, the notifications automatically update to reflect any changes!

Make sure you check your homepage frequently to stay on top of the tasks and notifications for your clients and cases!

We'll talk more about interventions and monitoring in a few moments, but first let's take a look at how you will get started on an intervention when it is going to be associated with an application to ENS for funding.

As you can see here in the case management lifecycle, apply for funding happens at the same time as RTWAP management. Although the application package can be created and worked on in earlier statuses, it can only be submitted when the case status is RTWAP management.

Let's look more closely at what's involved in an application for funding submitted through LaMPSS.

Application Package

➤ Application package screen allows the case manager to view the required application details, forms and documents in a checklist format.

A page called the application package screen enables a case manager to build an application package and submit it to ENS to apply for funding on behalf of a client. It allows the case manager to view the required application details in a checklist format. The application package screen can be used to attach or remove supporting documents, produce and view the case manager's statement and submit the application.

Additionally, after submission it provides a convenient place where ENS staff (e.g. Program Officer) can view the application checklist to verify completeness, see what was attached electronically, and see what remains to be mailed, emailed or faxed. The application package screen will be visible to both case management staff within your organization and ENS users working on individual funding agreements!

Apply for Funding Button

The application package screen is accessed from the action plan summary screen within a case. When the case manager indicates that an intervention is associated with an ENS funded program, an apply for funding button will appear on the action plan summary by the specified intervention. The application package can be created in any status but it can only be submitted during RTWAP management.

In this example, there is a skills enhancement intervention that will be delivered by NSCC. The apply for funding button *<click to reveal>* appears in the action plan summary in the row for this intervention. Clicking on the apply for funding button will launch the apply for funding popup window.

Apply for Funding Window

➤ The Apply for Funding Popup will display one or more of the following programs:
  ❑ Skills Development
  ❑ Skills Up
  ❑ Job Creation Partnership
  ❑ Targeted Wage Subsidy
  ❑ Feepayer
  ❑ Self Employment

Apply For Funding

One or more programs are available that offer funding for this type of intervention. Review the programs below and if your client is eligible, start an application for funding for a program by clicking the apply button.

Program: SKills Development IFA
Department/Area: LAE - ENS
Type of Funding: Federal LMDA
Program Description/Objectives:
Skills Development provides funding to eligible individuals who require skills training to secure employment. With the financial assistance provided by Skills Development, individuals arrange and pay for their own training.

Click here to see program website   **Apply Now**

Alternative programs with different funding sources:

Program: Skills Up IFA
Department/Area: LAE - ENS
Type of Funding: Federal LMA
Program Description/Objectives:
The Skills Up! program is for eligible African Nova Scotians who require skills training to get a good job. Skills Up! provides financial assistance to individuals, which can include tuition, living allowance, transportation and other costs associated with the training.

Click here to see program website   **Apply Now**

Cancel

An example of the apply for funding popup window is seen here. This window will display on or more programs that are available and offer funding for the specified type of intervention. As the case manager, you will review the programs listed and start an application for funding for a specific program by clicking on the apply now button. *<click to reveal>*

A link to the program website for each of the funding programs listed is included beneath the descriptions of each program.

When you select a program by clicking the apply now button you will be directed to what's known as the application package screen.

Application Package

➤ Case Header
➤ Application Package – Program Name
➤ Associated Agreement Details
➤ Application Checklist
  ❑ Case Elements
  ❑ Forms/Documents
➤ Case Manager's Statement

The application package screen enables a case manager to build an application package and submit it to ENS to apply for funding on behalf of a client. It allows for viewing the application details and checklist, attaching and removing supporting documents, producing and viewing a case manager statement and submitted or providing updates when required by the ENS agreement manager. Additionally, after submission, it provides a convenient place where ENS staff can view the application checklist to verify completeness and see what was attached and what remains to be mailed in.

Let's review the sections on the application package screen. *<click to reveal each section>* They include the standard case header that appears on all case screens as well as an application package section that indicates the program the application is for and links to the program website. A section called associated agreement details will display select details about the ENS funding agreement once the application package is submitted by the case manager.

The largest section of the screen is the application checklist which will display a row for each of the case elements and each form or document required as a part of the funding application.

Finally, the case manager's statement can be entered at the bottom of the application package screen.

Application Package

Let's start by looking at the application package section of the screen. The title for this section of the screen will include the full name of the program, such as "Skills Development IFA" (Individual Funding Agreement). This module displays some read-only information about the program drawn from the action plan details page as well as a link to the program website. *<click to reveal>*

The next section of the screen is the associated agreement details. Once the application is submitted this section will display the agreement number associated with this application, the agreement status, the program and the time and date of the most recent submission. There is also a message line in this section of the screen that will provide instructions about whether or not the package is still editable and if any changes might be required.

The next section of the screen is the application checklist. The list of case elements and supporting documents displayed within the application checklist are specific to the program being applied for. The first part of the checklist is case elements.

Case elements refers to pages or modules within the LaMPSS case screens. In this example, the three case elements are the needs determination, employment history and education.

The second column displays a status icon for each case element. When the status is incomplete with a question mark it means there is enough information to submit the application but it is possible additional information should be added.

To complete this section of the application, you will navigate to the screen for each case element listed and ensure all information is entered and up-to-date. You can navigate to each area of the case using your left navigation menu. *<click to reveal>*

Exercise – Apply for Funding (Part 1)

Let's move back into LaMPSS and work through these first few steps of the apply for funding process. In this exercise we will select the apply for funding button, choose Skills Development as the program being applied to, and ensure all of our case elements are complete.

Instructor-led Exercise – Apply for Funding (Part 1)

This is where the data entry you completed earlier in the case management lifecycle will become very valuable. You do not need to repeat information that you have already recorded in LaMPSS!

Edit Application

To return to the application package, you will navigate to the action plan summary screen in LaMPSS. You'll see here that the apply for funding button has changed to an edit application button. *<click to reveal>* The button has changed to reflect that we have selected the program and an application package is in the process of being completed. Click the edit application button to get back to your application!

Application Package

Application Checklist

Case Elements	Status		
Needs Determination	✓ Complete		
Employment History	❓ Incomplete?		
Education	✓ Complete		

Forms / Documents	Status	Paper	Date
Resume	✗ Missing	☐	📎
Family Size and Financial Statement	✗ Missing	☐	📎
Job Search Report	✗ Missing	☐	📎
SD Worksheet	✗ Missing	☐	📎
Labour Market Research	✗ Missing	☐	📎
Program Cost List	✗ Missing	☐	📎
Acceptance Letter	✗ Missing	☐	📎
Authorization to Quit	❓ Optional	☐	📎
Child Care Letter	❓ Optional	☐	📎
Medical Documentation	❓ Optional	☐	📎
Previous Marks	❓ Optional	☐	📎
Letter of Good Financial Standing	❓ Optional	☐	📎
Letter from Employer	❓ Optional	☐	📎
Career Transition for Medical Reasons	❓ Optional	☐	📎

The next part of the application package we need to work on are the forms and documents that are required as a part of the application. *<click to reveal>* Again, this list will be different for each of the different ENS funding programs.

In the first column the name of each document or form is listed and then the second column indicates the status for that item. In this section of the screen the possible statuses are:

-Complete

-Incomplete

-Incomplete(?)

-Optional

-Missing

-Mailed on

-Attached

Each of the documents and forms listed can be attached electronically directly to the application package using the document attachment icon in the appropriate row of the screen. *<click to reveal>* If a document is not available electronically and you are unable to scan it, you will use the checkbox in the appropriate row of the screen to indicate you will be mailing or faxing a hard copy of that document. *<Click to reveal>* The preferred methods are email or fax; however, until ENS will accept mailed documents. When you save the screen the date column *<click to reveal>* will update with the current date for any changes you've made.

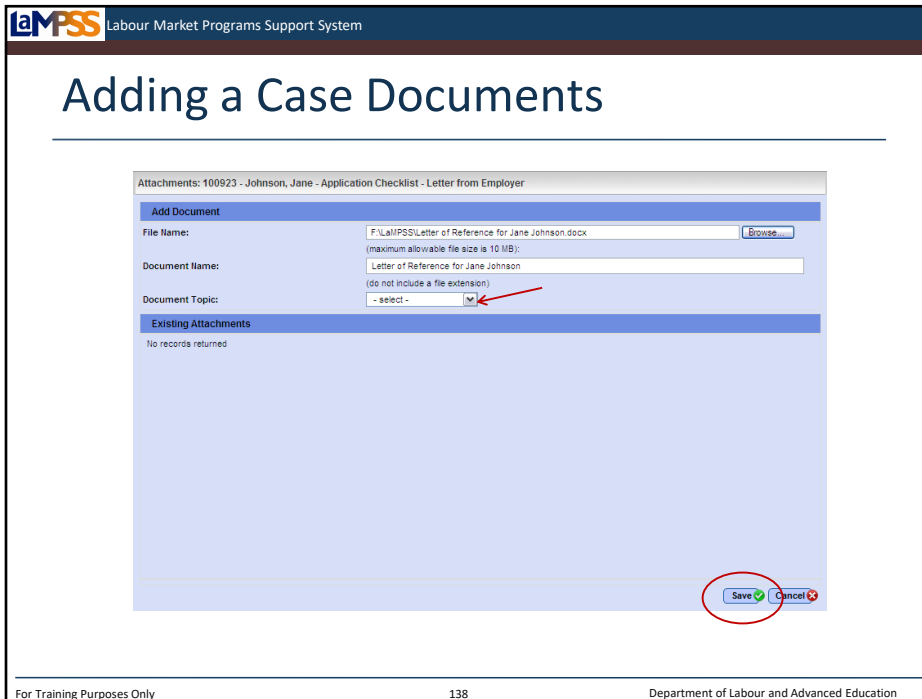Let's look at how you add case documents to LaMPSS before we move on with our application!

Case Documents

➢ LaMPSS provides the ability to attach documents throughout the case management lifecycle

➢ Two icons indicate that documents can be or already are attached to a case

➢ Attachments are automatically converted into PDF/A format and the native format is also maintained

LaMPSS provides the ability to attach documents to a case throughout the lifecycle. There are two icons associated with document attachments. One to indicate that an attachment can be added and one to indicate that there are attachments associated with a certain part of the case.

When an attachment is uploaded, it is automatically converted by LaMPSS into a PDF/A format; however, the native format is also maintained in the system and both will be accessible. The conversion into PDF/A format ensures that any user with the appropriate access to the case can open the attachment using Adobe Reader which can be downloaded for free on the internet.

When a case user adds a document, they are prompted to define key attributes that help to identify the documents attached. Each document is automatically associated with the section of the case screen where it is created, but it can be further categorized by topic which is selected from a drop-down menu each time a document is added.

Adding a Case Documents

Attachments: 100923 - Johnson, Jane - Application Checklist - Letter from Employer

Add Document

File Name: F:\LaMPSS\Letter of Reference for Jane Johnson.docx   Browse...
(maximum allowable file size is 10 MB):

Document Name: Letter of Reference for Jane Johnson
(do not include a file extension)

Document Topic: - select -

Existing Attachments

No records returned

Save   Cancel

When you select the document attachment (paperclip) icon, this case documents window will appear. To select a document from your own computer to add as an attachment, click the browse button. *<click to reveal>* A window will appear and let you browse your computer then select a document. *<click to reveal>* The document name will initially take the file name, but you can change this if you like. You will also be asked to select a document topic from a drop-down list. *<click to reveal>* This categorizes all documents and makes them easy to search later on.

Once you've selected a document, entered a document name and topic you will click the save button. *<click to reveal>*   The document attachment is created and you're returned to the page you were working on.

Viewing/Replacing Case Documents

Attachments: 100923 - Johnson, Jane - Application Checklist - Letter from Employer

Add Document

File Name: _____ [Browse...]
(maximum allowable file size is 10 MB):

Document Name: _____
(do not include a file extension)

Document Topic: - select - ▾

Existing Attachments

Document Name	Topic	View	Created	Changed	
☐ Letter of Reference for Jane Johnson	Supplementary Information	PDF/A DOCX	Nov 24, 2011	Nov 24, 2011	Replace

Displaying records 1 of 1

[Delete ⊖]

[Save ✓] [Cancel ✗]

Later on, if you navigate back to the same document attachment icon and open it again, any documents added previously will appear in the list of existing attachments. A new document can still be added in the add document section of the window, or changes can be made to existing documents.

If the document is less than 30 days old you will be able to select it *<click to reveal>* using the checkbox to the left of the document name and then select the delete button. *<click to reveal>* You could do this to delete a document if, for example, you mistakenly selected the wrong document.

Alternately, you can choose to view an existing attachment by selecting either the PDF/A or native format version. *<click to reveal>* Finally, you can also replace the document with, for example, an updated version using the replace button seen here *<click to reveal>*. This button will keep all the document information you've entered but prompt you to select a new document from your computer to replace the existing one.

Now that you know a bit more about case documents, let's jump back to the forms and documents section of the application checklist.

Add/Edit Forms and Documents

You will see here in the application checklist that all of the required forms or documents have been attached. *<click to reveal>* The child care letter, however, is going to be mailed, emailed or faxed to ENS. *<click to reveal>* The checkbox in that row has been selected to indicate that it will be submitted by mail and when this screen was saved the date was updated so both case management staff and ENS staff will be able to see what date it was mailed on.

The final section of the application package is the case manager's summary statement module. We'll talk about this in a bit more detail in a few minutes, but for now note the question reading "If spousal information was collected, has the application's spouse signed the consent form?". *<click to reveal>* This question should be answered using the drop-down menu. Spousal consent will be collected where applicable on a financial worksheet that is then added as a document attachment.

Once the case elements, forms and documents and this question are all answered you will need to determine whether or not the application package is complete. *<click to reveal>* If the answer is no, you will revisit each section of the application package until everything is complete. If the answer is yes, then the case manager's summary statement can be added and the application submitted!

Let's move back into LaMPSS and work through the next few steps of the apply for funding process. In this exercise we will add all of the mandatory documents or forms to our Skills Development application.

Instructor-led Exercise – Apply for Funding (Part 2)

Complete Case Manager's Statement
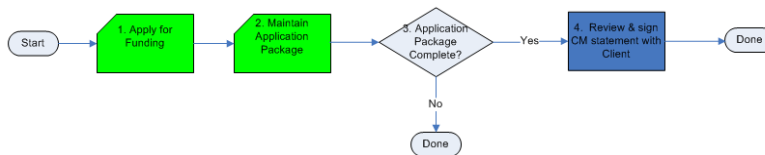
The case manager's summary statement allows the case manager to write their rationale or narrative portion of the application. This section is included with all applications for funding.

As you know, prior to LaMPSS the case manager's statement often included a lot of duplication of information that was captured elsewhere in a case. With LaMPSS it is now produced by answering a series of questions and then entering a smaller narrative. Before submitting an application for funding, as you can see in the process diagram seen here, the case manager's statement should be printed, reviewed and signed with the client. Upon submission this document is automatically produced by LaMPSS and attached to the newly created agreement.

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Case Manager's Statement

The case manager's summary statement includes two questions in addition to the one about spousal information which we have already looked at. You must respond to the following questions using drop down menus:

-Do you support this Return to Work Action Plan?
-Have both you and the client signed the Case Manager statement?

The only options you can select from for these questions are yes or no.

The other section of this module is a large text area. This is where you can provide your rationale or narrative about this client and the application for funding. This section asks, "Why in your professional opinion is this funded intervention supported (or not)? Provide details on how the intervention will assist client to overcome barrier(s). If you are not supporting the client's RTWAP you should provide a rationale.

Provide clear links on how this allows the client to reach their employment goal. If a client has more than one employment goal identified in the needs determination (e.g. they have been accepted to one program and are on a wait list for another) the application and the case manager's statement should address each employment goal. Provide a summary statement of the LMI research completed by the client and included in the application package."

Once this section of the screen is complete use the print/view statement button to generate a printer-friendly version to review and sign with the client. *<click to reveal>*

Remember, any information that has been entered into other LaMPSS screens (e.g. education history, employment goal, barriers) **does not** need to be entered again here.

When this screen is saved a spell checker will automatically execute on your case manager's statement.

The case manager's statement is a very important factor in consideration of a client application for ENS funding. Please ensure the statement provides concrete rationale that supports the need for the intervention. The statement must indicate what is preventing the client from obtaining suitable employment with their current skills and the process the client has gone through to explore employment options. There are some specific requirements by program for the information that should be included in the case manager's statement. You can find this information in the ECM Case Management Frequently Asked Questions.

Once the entire application checklist, including the case manager's summary statement, is complete the case manager will submit the application for funding.

You will review the application package *<click to reveal>* to ensure it is complete and then select the submit application button at the bottom of the screen. *<click to reveal>* A popup window will ask you to confirm that you wish to submit the application. *<click to reveal>* Click OK to continue. *<click to reveal>*

An icon will appear while the application is submitting to show that the PDF of the case manager's statement is being created, then the application is submitting, and then this message will appear. *<click to reveal>* It will confirm that the application has been successfully submitted and give you the agreement number for the newly created agreement application. *<click to reveal>* The message also reminds you to mail any supporting documents that you have indicated would be submitted by mail. *<click to reveal>* This is very important to avoid any delay in processing the application for funding!

To ensure efficient processing, ENS prefers to have all supporting documents in electronic format and attached to the LaMPSS application package. If an application is submitted and supporting documents are to follow, please ensure all documents clearly identify the client (including SIN) and forward them to the appropriate ENS office or regional email address. In the event where providing a document electronically is not an option, the document should be faxed or mailed to ENS within 10 days.

Incomplete applications, including those missing documents, will be returned to the case manager for completion and resubmission or closed if all documents are not received within the 10 day timeframe.

Completed Application Package

Let's look at an example of what the application package screen will look like once the application for funding has been submitted. Once again, the button on the action plan summary page has changed. Initially it was an apply for funding button, then once the application package was created it was an edit application button. Once the application package is submitted it can no longer be edited so the button now reads view application. *<click to reveal>* Click this button to navigate to the application package screen.

The application package page screen will now show the date the application package was submitted to ENS. *<click to reveal>* The message line will remind you that the application package can no longer be edited or submitted. *<click to reveal>* Also note that the newly created agreement ID is displayed in this section of the screen. *<click to reveal>* The agreement ID is actually a hyperlink that will navigate to the agreement home page. Let's take a look at that page!

This is the agreement homepage a case manager can access to monitor the agreement associated with an application for funding once it is successfully submitted. You can use this page to see things like the agreement manager's name, the ENS office working on the agreement and the status of the agreement. *<click to reveal x 2>*

You can monitor this agreement homepage to see when the agreement moves from one status to another. The statuses that an individual agreement will move through are:

-Application

-Assessment

-Assessed

-Approved

-Active

-Closed

As in the past, the ENS program officer will be the one to communicate to the client that are eligible for funding for a program; however, unlike in the past you will be able to view the status change from "assessed" to "approved" using LaMPSS and the agreement homepage.

Update Intervention Status

Finally, don't forget to initiate the intervention on the action plan once it begins! You'll remember from our exercise earlier that to update the status of an intervention you navigate to the action plan details page and update the status to in progress. *<refer back to slide 106 to review steps if necessary>*

Exercise – Apply for Funding (Part 3)

Let's move back into LaMPSS and work through the final few steps of the apply for funding process. In this exercise we will write a case manager's statement, indicate our support for the funded intervention, and submit the application!

Instructor-led Exercise – Apply for Funding (Part 3)

Application

> Applications are received in a regional 'intake bucket' at ENS
> ENS staff monitor received applications on a regular basis
> Applications are assigned to Agreement Managers (aka Program Officers) for verification and assessment
> If additional information or documents are required, ENS staff will request additional information

Once an application is submitted electronically the newly created agreement will appear in what's known as an intake bucket. *<click to reveal>* Each region for ENS (Metro, South Shore Valley, Northern, Cape Breton) has an intake bucket that will be monitored on a regular basis by program staff. *<click to reveal>*

Each individual funding application will be assigned to an agreement manager to be verified and assessed. *<click to reveal>* If during this process staff identify any missing case elements, forms or documents they will use LaMPSS to indicate that more information is required. *<click to reveal>*

The case manager will receive a notification on their user homepage and a message will appear on the application package screen for the case. Let's take a look.

Resubmission of Application

Here you see the information notification that will appear on the case manager's user homepage when information is missing for an application. The notification reads, "Application requires resubmission, information missing." These notifications will always have a high priority. You can use this notification to navigate directly to the case homepage. From the case homepage you will navigate to the application package screen.

Resubmission of Application

In this situation, the application package will also display a message in the associated agreement details section of the screen. The message reads, "The agreement manager has indicated changes are required. Please provide updates and re-submit this application package."

Any conversations about what information is actually missing will occur between the case manager, the client and the agreement manager outside of LaMPSS. Once you have found out what is missing and provide the required information you will follow the same steps as before to submit the application package with the updates.

Agreement Home Page

Once resubmitted, the agreement manager can continue on with the verification and assessment of an application for funding.

As a case manager, you will see the name of the agreement manager assigned to the agreement in the agreement header on the agreement homepage. Remember, you can also monitor the agreement homepage to see the current status of the agreement including the date it entered that status! *<click to reveal>*

RTWAP Management

➢ RTWAP Management is ongoing while an application for funding/any funded interventions are in progress
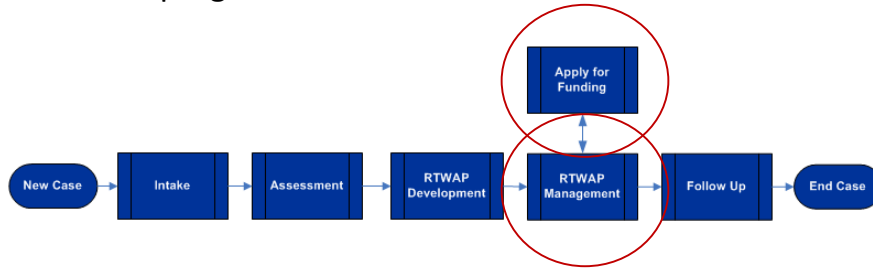
Let's move back and look at the rest of the RTWAP management process, which will be ongoing while any applications for funding are being processed and assessed by Employment Nova Scotia.

Monitor Interventions
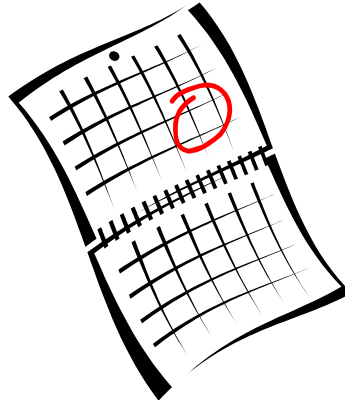
As a client works through each of the interventions in their action plan, you will follow up with them on their progress. As we've seen, LaMPSS automatically generates action required notifications for you to follow up with a client at the **end** of each intervention. You can set up additional reminders for yourself using LaMPSS notifications.

Maintain Notifications

As you continue to monitor action plans and other activities for all of your clients, the section of your user homepage where notifications appear is going to become a very important tool for you to use! The section called my notifications due/overdue will show all your notifications with due dates within the next month and those that are already overdue. This is not a full listing of all notifications, only those due in the next month or overdue. The due date of each one appears in the far right hand column. Notice that all notifications have a priority indicator which will appear as a green (low), yellow (medium), or high (red) dot.

Clicking on the notification type (e.g. Info, Action Required) will take you to the maintain notifications screen and display any notifications associated with the same case as the one you selected. To navigate to the maintain notifications page and see a full listing of all notifications click the notifications actions link in the left navigation menu.

Notifications

➢ Notifications are user-related communications that appear on all types of homepages

➢ Notifications are associated with user IDs; however, Action Required notifications are transferred if the case they refer to is transferred to another user

Notifications are user-related communications that can appear on all types of homepages such as the user homepage, organization homepage, case homepage and agreement homepage.

Notifications are associated with user IDs, but if they are 'tagged' with a case ID number like in the case of action required notifications they are transferred if the case they refer to is transferred to another user.

There are lots of different ways to use notifications in LaMPSS that you'll become familiar with as you get comfortable using the system.

Maintain Notifications

➤ The Maintain Notifications screen allows a user to:

❑ Search for an existing Notification

❑ Review and Delete existing Notifications

❑ Create a new Notification

The maintain notifications page, seen here, is separated into three sections. The first one is a notification item search where you can search all of your notifications based on a variety of criteria. The second section shows the search results, or by default, will show all notifications. The search results section of the screen will allow you to review and delete existing notifications. Finally, the third section of the screen allows you to create a new notification for yourself. Let's take a closer look!

Creating a Notification

- LaMPSS users can create Reminder Notifications
- Each Notification is assigned a Due Date and Priority
- Notifications can be associated with an Agrmnt/Case ID

To create a new notification for yourself you will need to enter a few pieces of information. The type of notification is automatically set to reminder when you create a notification. You will select a due date and a priority for each notification you create. You can also choose to enter a case or an agreement ID to associate this notification with. If I were creating a notification about Jane Johnson I might want to enter Jane Johnson's case number in this field. The description field allows you to enter the text of the notification. You might enter something like "Call Jane on Tuesday to remind her to send me her new child care letter."

Once all fields are complete, select the create notification button. A blue checkmark will appear if the notification is created successfully. If you did not fill out one or more of the required fields, you will receive an error message and will have to finish completing the required fields before selection the create button again. You cannot modify a notification item once it is completed.

Interactive – when might a Case Manager want to create notifications? Brainstorm with participants.

Deleting a Notification

- In the Search Results section of the screen select the checkbox next to the Notification

- Click Delete

- Action Required Notifications cannot be deleted

Search Results

P	Type	Agrmnt/ Case ID	Org/Player	Program	Created By	Due Date
☐ ●	Info	100923	Johnson, Jane	ECM (LAE-ENS)	GRACEAM	Dec 01, 2011
	Application requires resubmission, information missing					
●	Action Required	100923	Johnson, Jane	ECM (LAE-ENS)	SMITHJ-100319	Nov 17, 2011
	Progress check with Jane Johnson in regards to intervention: JobSearch-Workshops with a start date of 2011-11-16					
●	Action Required	100923	Johnson, Jane	ECM (LAE-ENS)	SMITHJ-100319	Nov 28, 2011
	Progress check with Johnson, Jane in regards to intervention: SkillEnhancement-EssentialSkills-ComputerUse, with a start date of 2011-11-28					
●	Action Required	100923	Johnson, Jane	ECM (LAE-ENS)	SMITHJ-100319	Dec 21, 2012
	Progress check with Jane Johnson in regards to intervention: SkillEnhancement-JobSpecific-FormalEducation with a start date of 2012-01-01					

☐ Select All
Displaying notifications 1 - 4 of 4

Delete ⊖

The maintain notifications page also allows you to remove or 'complete' notifications. To remove a notification select the checkbox that appears to the left of the notification in the search results section of the screen and then select the delete button. You can delete multiple notifications at once.

A popup message will appear asking whether you are sure you wish to mark the selected items as completed. Select OK and the notifications will be removed. Remember that once a notification has been addressed, the information associated with it is not stored for future reference.

System generated notifications that have a type of "Action Required" cannot be deleted. They will automatically go away once you completed the requested action in LaMPSS!

Exercise – Practice Using Notifications

Let's move back into LaMPSS and practice creating a few notifications for ourselves.

Instructor-led Exercise – Practice Using Notifications

Case Tasks

➢ Tasks are case-specific to do items
- ❑ If a case is transferred to a new case manager, all tasks are also transferred

➢ Tasks can be created:
- ❑ Automatically by LaMPSS
- ❑ Manually by a LaMPSS user

➢ Information on completed tasks is saved and stored within the case in LaMPSS

Like notifications, tasks are going to become a very important tool for you to use! The section called my tasks due/overdue will show all your tasks with due dates within the next month and those that are already overdue. This is not a full listing of all tasks for your cases, only those due in the next month or overdue.

Tasks are case related activities that must be completed within a given timeframe. Only case managers who have active caseloads will have tasks on their home page. Tasks, unlike notifications, are tied directly to cases so if the case is transferred to a new case manager all tasks tied to the case are also transferred.

Tasks can be created automatically by LaMPSS or manually created by a LaMPSS user. We have already seen examples of the tasks that LaMPSS will create such as complete intake, complete assessment and develop action plan. There are many situations where a user may want to create a task manually as well which we will look at on the next slide.

As tasks are completed, LaMPSS saves and stores all information associated with each task within the case for future reference. You'll remember this is different from notifications where no information on past notifications is maintained once they have been completed/deleted.

Case Tasks

➢ Tasks can be manually created to:
- ❑ Obtain Marks
- ❑ Generate Correspondence
- ❑ Request for documentation
- ❑ Request for tuition deferral
- ❑ Review information for multi year agreements

➢ A "General" Case Task is also available
- ❑ Case Notes or Case Documents can be used to specify what these Tasks are for

Tasks can be used to record events that have already occurred or plan those that should take place in the future on a case. Tasks can be manually created to:

-Obtain marks

-Generate correspondence

-Request documentation

-Request a tuition deferral

-Review information for multi-year agreements.

A manual task can also be created and assigned a general reason, then case notes and case documents can be used to specify more information about that task.

Tasks are a really important tool to help you organize and document the events that occur during the case management lifecycle. Let's take a look at a demonstration!
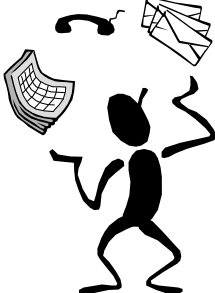
Let's move back into LaMPSS and practice creating a task for our case.

Demonstration– Practice Using Tasks (creating and completing)

So, using tasks and notifications to help manage your workload, you will follow up with clients periodically on their progress through the interventions outlined in their action plan as you've done in the past. Assuming the client is going to continue working through the RTWAP, you will make any necessary updates to the interventions listed in the action plan summary in LaMPSS. Let's look at the possible updates you may need to make to the action plan and interventions, then move into LaMPSS so you can practice these actions!

If a client has completed an intervention, you will update the action plan to show that it has been completed and record the completion date. *<click to reveal>*

If you identify that a client may require another intervention, in addition to the ones you set up during RTWAP development, you can add one or more new interventions. *<click to reveal>* The interventions added to the action plan initially were a starting point. You can build upon those interventions throughout RTWAP management. To add an intervention you follow the same steps we've already looked at by using the add another button on the action plan summary then completing the action plan details screen.

Finally, you may discover through your monitoring that while a client is going to continue on with their action plan overall, they will not be finishing a specific intervention. If that's the case you will need to update the intervention with an incomplete status and select a reason to reflect why the client is not finishing that intervention. *<click to reveal>*
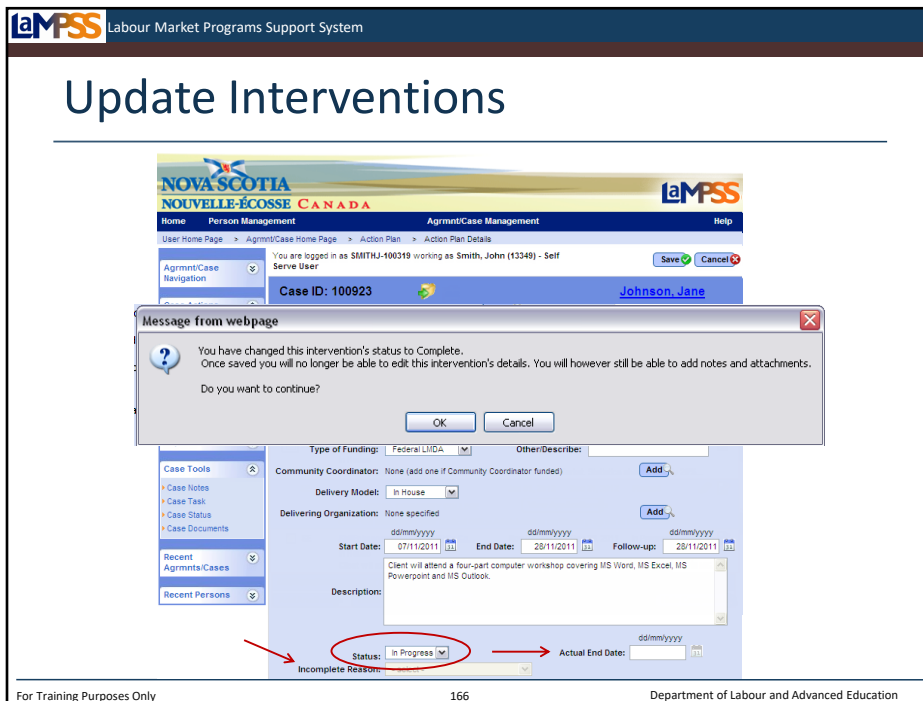
Let's start by looking at how to update the intervention status if a client has completed an intervention or alternately, if you find out they will not be finishing an intervention.

From the action plan summary screen you can see the status of each of the intervention's in the client's action plan. *<click to reveal>* Click on the intervention type hyperlink to navigate to the action plan details page. *<click to reveal>*

<click to reveal> Near the bottom of the action plan details/edit intervention screen there is a status field. This is the field we used earlier to indicate that the intervention was in progress. Now, we will update this field to either complete or incomplete, depending on the situation. *<click to reveal>* The actual end date can be entered using the popup calendar to the right of the status field. *<click to reveal>* The actual end-date can be backdated but LaMPSS will not let you select a date in the future.

If the intervention is complete, these are the only fields you will need to change before saving the screen. If the intervention is incomplete you will be required to use the drop down list seen here to enter an incomplete reason. *<click to reveal>*

Incomplete reasons include:

-Client could not attend

-Client did not show/follow through

-Gained employment

-Intervention cancelled

-Left labour market

-Plan change

Once all changes are made you can save the screen. A message from the webpage will appear to remind you that you have changed the intervention's status to either complete or incomplete and after you save the changes you will be unable to edit any details of the intervention. *<click to reveal>* The only updates you will be able to make after you mark an intervention complete or incomplete are to add notes or case documents.

Update Interventions

When you save the intervention with the updated status you will be returned to the action plan summary screen. The intervention will still appear in the list of action plan interventions *<click to reveal>*; however, the status will have changed. Notice the other interventions you have planned with your client are still displayed at the top of the action plan interventions. *<click to reveal>*

If you identify any other interventions that would be appropriate for the client you can use the add another button seen here *<click to reveal>* to add additional items to the action plan. For a reminder on how to add interventions you can refer back to the section of case training on RTWAP development.

Finally, don't forget that from this screen you can view the application package associated with any funded interventions by clicking the view application button. *<click to reveal>*

RTWAP Management

- Action Plan Complete
- Incomplete Found Employment
- Incomplete Started Business

Apply for Funding

New Case → Intake → Assessment → RTWAP Development → RTWAP Management → Follow Up → End Case

- Moved out of province
- Left labour force
- Referred Out
- Did not follow through

End Case

Close Case
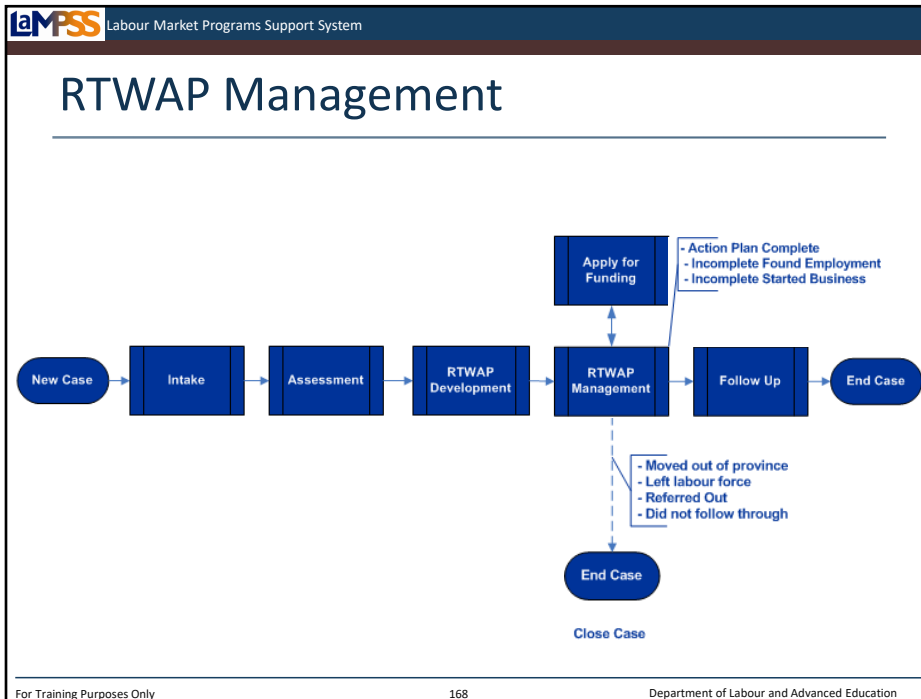
As you know, the process of managing an action plan can last weeks, months or in some cases even years. Throughout this period you will be initiating, updating, adding, deleting and completing interventions.

When the final intervention in a client's action plan is finished, the case will move into the final stage of the case management lifecycle – follow up. It's also possible, however, that the case moves into follow up early if the client does not finish the action plan but they either find employment or start their own business. *<click to reveal>*

Alternately, a case may not move into follow up at all. There will be reasons you may need to close a case directly from RTWAP management without moving on to follow up. These include the client moving out of province, leaving the labour force, being referred out to another organization or simply not following through on the action plan. *<click to reveal>*

If you are going to close the case from RTWAP management you simply follow the steps we learned about earlier to complete the close action plan task with one of the four outcomes seen on the diagram here.

If you are going to move the case into follow-up, you will select one of the three outcomes seen at the top of the diagram.

It will be key for you to remember, especially when your RTWAP management is finishing before the planned end date of the last intervention, that all interventions must be closed before you can address the task to close the action plan. This means that if there are any interventions that have a status of planned or in progress you will have to deal with them before you can move on with the case.

Let's look at how to do this!

Complete All Interventions

- Before the RTWAP can be closed, all interventions must be closed

- Status should be **Complete** or **Incomplete**

- If an intervention has not been started, it can be **Deleted**

On the action plan summary screen you will be able to see, at a glance, whether any interventions are remaining with a status of planned or in progress. In other words, every intervention appearing in the action plan should have a status of complete or incomplete.

If an intervention has not been started and the status is still planned, you will be able to select the checkbox next to that intervention and delete it from the action plan. If an intervention is in progress, you will need to update the status to either complete or incomplete. You can follow the same steps we reviewed earlier to update the intervention status on the action plan details page.

If the RTWAP has come to a close naturally, meaning the last intervention has reached its end date and you have completed the intervention follow up with the client, all these interventions should already be closed. It's mainly in situations where the action plan is finishing early that you will have work to do before you can close the action plan.

Employment Outcomes

➤ An initial employment outcome must be recorded before the Close Action Plan Task can be completed

➤ There are four types of employment outcomes:
  ❑ RTWAP Closure
  ❑ 24 Week
  ❑ 52 Week
  ❑ Ad Hoc

Once all interventions in the action plan are closed, you will record something called an employment outcome. The initial employment outcome must be recorded before you can complete the close action plan task.

There will be four types of employment outcomes. They are:

-RTWAP Closure Employment Outcome

-24 Week Employment Outcome

-52 Week Employment Outcome

-Ad Hoc Employment Outcome

We will talk about the last three when we get into the follow up stage of the case management lifecycle. The RTWAP closure employment outcome is the one that is key during RTWAP management. It is recording this outcome that allows you to complete the close action plan task.

Let's take a look at the screen!

Update Action Plan Outcomes

Logout

NOVA SCOTIA
NOUVELLE-ÉCOSSE CANADA   LaMPSS

Home   Person Management   Agrmnt/Case Management   Help

User Home Page   >   Agrmnt/Case Home Page   >   RTW Outcomes

You are logged in as SMITHJ-100319 working as Smith, John (13349) - Self   Cancel
Serve User

Agrmnt/Case Navigation

Case ID: 100923   Johnson, Jane

Case Actions

Case Details   Program: ECM(LAE-ENS)   Status: RTWAP Mgmt - Nov 22, 2011
Case Additional   Case Manager: Smith, John (13349)   SIN: 124-224-239
Information   Office: HALIFAX COMMUNITY LEARNING NETWORK
Education & Experience
Needs Determination   **Employment Outcomes**
Results
RTW Action Plan   Outcome   Type   Outcome Date   NOC / Job Title   Goal Met
RTW Outcomes
                           ☐ Unemployed   RTWAP Closure Nov 28, 2011
Reports   Displaying records 1 of 1

                           Add Another   Delete
Case Tools
Case Notes   Cancel
Case Task
Case Status   employment: - select -   ☐ Out of country
Case Documents   Job Title: NOC:
                                          Is this job in the client's preferred
Recent   ☐   field of employment?
Agrmnts/Cases   Work
                           hours/week: Hourly Wage:

                           Comments:

The last screen in the case actions section of the left navigation menu will be used to record employment outcomes. Initially, this screen will not have any data. You will select the add another button to add the first employment outcome. *<click to reveal>* Clicking this button will navigate to a more detailed employment outcome screen where you can enter detailed information about the outcome of the action plan. *<click to reveal>* The first time you record an outcome you will specify whether or not the action plan was completed by the client and whether the client is now self sufficient. If the action plan was not complete the screen will allow you to indicate why it was not completed.

It's important to ensure the outcome type selected is RTWAP closure employment outcome. *<click to reveal>* This outcome type must be selected so that LaMPSS will allow you to complete the close action plan task. An effective date will be entered for the outcome. *<click to reveal>* Other information you can enter includes:

-Employment status

-Employment details

-Source of job lead

-Employer

-Province of employment

-Job titled

-Is this job in the client's preferred field of employment

-Work hours/week

There is also a free text section where additional comments can be entered. Once all relevant information has been completed the screen should be saved. *<click to reveal>* This will return you to the main outcomes screen. The newly added employment outcome now appears in the body of the screen. Later, during follow up, this list will build as you complete additional follow ups with the client.

Close Action Plan Task

The final step in RTWAP management is to close the action plan task. As you've learned, there are several ways to navigate to the case tasks screen. As you can see here, the close action plan task will appear on your user homepage when it becomes due. *<click to reveal>* Clicking on the text will navigate you directly to the case tasks screen for that case.

Action Plan Outcomes

➢ Action Plan Complete, Incomplete Found Employment, Incomplete Started Business
- ❑ Case status changes to Follow Up
- ❑ Tasks created for the 24 Week Employment Outcome & 52 Week Employment Outcome

➢ Moved out of province, Left labour force, Referred Out, Did not follow through
- ❑ Case status changes to Closed

Throughout the case management lifecycle, you have moved the case onto the next stage of the case management lifecycle (or closed it) by completing a case task. RTWAP management will again require you to complete a task.

If the action plan is complete or incomplete because the client found employment or started a business the case status changes to follow up. Tasks are created for the 24 week employment outcome and 52 week employment outcome. *<click to reveal x3>*

If the client moves out of the province, leaves the labour force, is referred out or simply does not follow through the case status changes to closed and you are finished with the case. *<click to reveal x2>*

Let's move back into LaMPSS to look at a demonstration of how to close the action plan and move a case into follow up. Your cases are not ready to move into follow up yet, because they still have active interventions and even a funded application in progress, so you can follow along on my screen.

Instructor-led Demo – Complete Close Action Plan Task

The final stage of the case management lifecycle is follow up. Let's take a look!
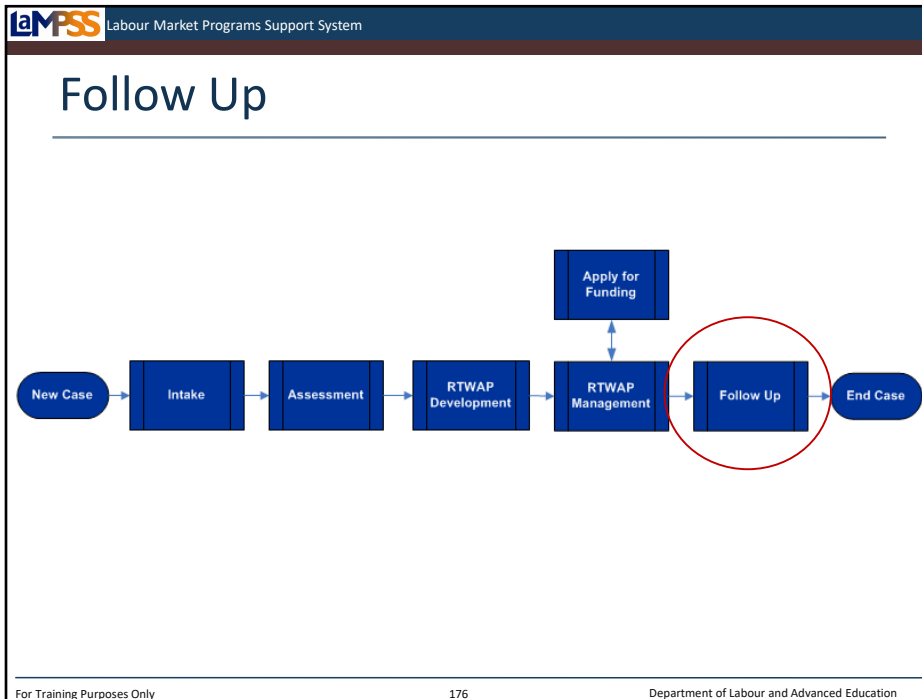
Follow Up

Follow-up is the last stage of the case management lifecycle before the end of a case. As we've learned, cases move into this status when the RTWAP is completed or when the client finds employment or starts a business.

During this stage of the lifecycle, there will be scheduled follow ups at set dates to determine and capture the outcomes of the action plan at specific points in time. Capturing these outcomes allows government to measure the effectiveness of the investment in program funding. Once all follow ups have been completed the case is closed. Alternately, a case may be closed before all follow ups are completed, but only in specific circumstances which we will take a look at shortly.

Follow Up with Client

➤ Three types of Employment Outcomes are recorded during Follow Up:
- ❑ 24 Week
- ❑ 52 Week
- ❑ Ad Hoc

You will recall that the first employment outcome, known as the RTWAP closure employment outcome, has already been recorded during RTWAP. Recording that initial outcome enabled us to complete the task to close the action plan and move the case into follow up status.

The other three types of employment outcomes, which can be recorded during follow up, are the 24 week, 52 week and ad hoc outcomes. The 24 week and 52 week follow ups are scheduled at 24 and 52 weeks following the end of the final intervention in the RTWAP. An ad hoc employment outcome can be recorded anytime during follow up status.

As a case manager, you will be alerted when a scheduled (24 or 52 week) follow up is due through a notification on your user homepage and the case homepage. You will contact the client as per your organization's standard practices to find out what their employment situation is.

The steps to record an employment outcome during follow up are the same as the ones we reviewed to record an employment outcome during RTWAP management. Let's take a look!

Record Employment Outcome

Once again you will use the employment outcomes module seen here. Any previously recorded outcomes, such as the RTWAP closure outcome, will be listed on the screen. To add a new outcome click the add another button. *<click to reveal>* The employment outcome screen will appear and you will enter detailed information about the outcome such as employment status, employment details, source of job lead, employer, province of employment, job title, NOC code, hours/week and hourly wage. *<click to reveal>*

Select details will be carried forward from the previously recorded outcome, so if there has been no change from the last time an outcome was recorded you can simply save this screen and you are finished!

The outcome type will default to either 24 week, 52 week or ad hoc depending on when you access this screen. LaMPSS is designed to predict which outcome you are recording; however, the outcome type can be changed manually using the drop-down menu. Also remember that for the 24 week and 52 week outcomes the outcome effective date will default to the appropriate date so no date calculations are required on your part. If the job started earlier than the outcome effective date use the start date to reflect it!

<click to reveal> Here you see an example of what the employment outcomes screen might look like for our sample client, Jane Johnson. The 24 week employment outcome was due so her case manager got in touch with her by telephone to check in. He filled in the details of Jane's employment situation in LaMPSS. Although she was still unemployed at the close of the action plan, Jane has now found a full-time job as a secretary at Dr. XYZ's Medical Practice. The case manager has gathered and filled in relevant details such as her work hours/week and hourly wage. Since Jane's employment goal was to work as a medical office assistant, her case manager also selects the checkbox to indicate that this job is in the client's preferred field of employment. A NOC code can be selected to further categorize the job that Jane found. *<click to reveal>* Click on the magnifying glass by the NOC code field to search for the appropriate code.

When all updates have been applied saving this screen will navigate back to the main employment outcomes module. *<click to reveal>*

Record Employment Outcome
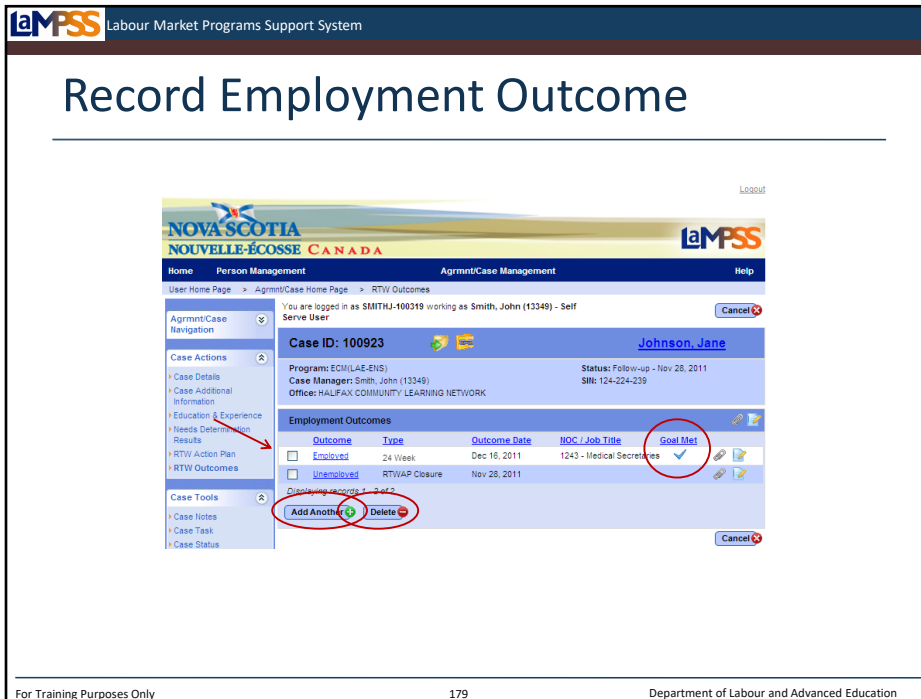
The newly added outcome appears at the top of the list. Key details from the previous screen are carried forward such as the NOC code/job title and the fact that this job is in her preferred field of employment, therefore her goal was met. *<click to reveal>*

If any changes are required to a previously recorded employment outcome, the case manager can apply changes (until the case is closed) by navigating back to the employment outcomes screen using the hyperlink in the outcome column. Alternately, if an outcome needs to be deleted (e.g. Created in error) the case manager can do this by selecting the checkbox next to that outcome and then clicking the delete button at the bottom of the screen. *<click to reveal>* There are a few restrictions on what can be deleted. The RTWAP closure employment outcome cannot be deleted once a case is in follow up status. The 24 and 52 week outcomes can not be deleted, only updated. If you try to delete one of these two outcomes an error message will appear reading "This outcome cannot be deleted. If it is incorrect please update it to be correct as opposed to deleting it."

When the next outcome is due, or when you want to add an ad hoc outcome, simply revisit this screen and use the add another button *<click to reveal>* and the same steps to record the next outcome.

Employment Outcome Rules

➢ 24 Week Employment Outcome cannot be recorded until:
  ❑ RTWAP Mgmt is closed
  ❑ RTWAP Closure Employment Outcome is recorded
  ❑ 22 weeks or more after the action plan end date

➢ 52 Week Employment Outcome cannot be recorded until:
  ❑ 48 weeks or more after the action plan end date

➢ Only one 24 Week and one 52 Week Employment Outcome can be added to a case

There is some logic built into the way LaMPSS has been designed to facilitate recording the appropriate employment outcome and the appropriate time during follow up. On this slide we'll review a few of the rules governing when you can record which types of outcomes. The first thing to be aware of is that the RTWAP closure, 24 week and 52 week outcomes must be recorded in sequence. You cannot record each until the one that comes before it has been completed.

Let's look first at the 24 week employment outcome. Before this outcome can be recorded, a few conditions must be met. The case must be in follow up status to record the 24 week outcome. *<click to reveal>* This means you must have recorded the RTWAP closure employment outcome and completed the task to close RTWAP management. *<click to reveal>* In addition, the 24 week outcome cannot be recorded until a date that is 22 weeks or more after the action plan end date. *<click to reveal>* This means you cannot record the 24 week outcome at, for example, 20 weeks after the end of the action plan. If you wish to record an additional employment outcome during this interim period you should use an ad hoc employment outcome.

If the employment outcomes cannot be determined at 24 weeks, you can record an employment outcome of unknown. When you subsequently complete your 52 week follow up you should ask the client what their employment status was at 24 weeks and update the information in LaMPSS!

<click to reveal> Likewise, the 52 week employment outcome cannot be recorded until a date that is 22 weeks or more after the action plan end date. *<click to reveal>* If you wish to record additional employment outcomes between the 24 week outcome and this point in time you should use another ad hoc employment outcome.

<click to reveal> Finally, note that only one 24 week and one 52 week employment outcome can be added to a case. You'll recall from the previous slide that these types of outcomes can not be deleted, only updated. Ad hoc outcomes differ in that you can add as many of them as required and they can be deleted if necessary.

Employment Outcome Rules
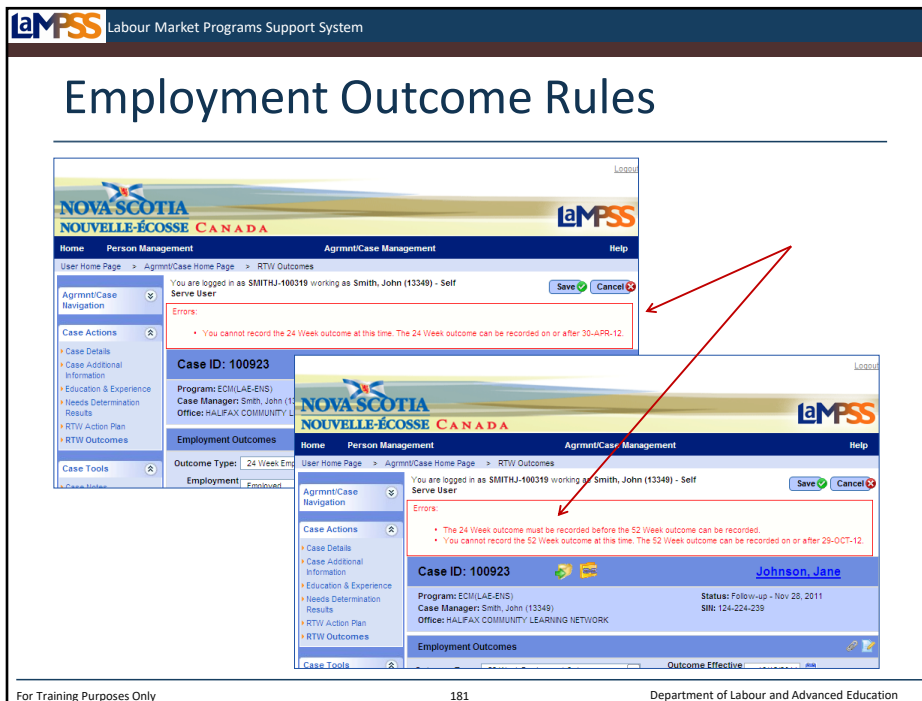
If the employment outcome a user is entering does not meet the conditions outlined on the last slide, a red error message will appear at the top of the screen when a save is executed, as seen here.

For example, the first error message seen here reads: "You cannot record the 24 week outcome at this time. The 24 week outcome can be recorded on or after <date>" This means the user has tried to record the 24 week outcome but it is not yet 22 weeks after the action plan end date. Note that LaMPSS gives the user the exact date on which they will be able to come back and record the outcome!

Another example of an error a user may receive is the second one seen here, which reads: "The 24 week outcome must be recorded before the 52 week outcome can be recorded."

52 Week Employment Outcome

➤ Saving the 52 Week Employment Outcome closes the case

➤ A confirmation message is displayed :
❑ *"Upon saving this outcome, this case will be closed and further updates to Employment Outcomes will not be permitted. Do you wish to save this outcome and close the Case? Click OK to proceed."*

The final step in the case management lifecycle is to record the 52 week employment outcome. When this outcome is entered and saved, LaMPSS closes the case. Closing a case cannot be reversed, so it is important to ensure you have completed all work on the case before you record the 52 week employment outcome.

When the 52 week employment outcome is saved, a confirmation message is displayed: "Upon saving this outcome, this case will be closed and further updates to Employment Outcomes will not be permitted. Do you wish to save this outcome and close the case? Click OK to proceed." By selecting OK the 52 week employment outcome is saved and the case changes from follow up status to closed.

This is how you close a case where follow up is completed successfully; however, you will close the case a different way in some situations. Let's take a look.

Manually Close Case from Follow Up

➢ Follow Ups Not Achievable
➢ New Case Required
➢ Left Labour Force

Earlier in the case management lifecycle we reviewed how to manually close a case using the case status screen. A case can be closed in follow up status by following these same steps. The three reasons available to close a case during follow up are:

-Follow ups not achievable

-New case required

-Left labour force

The first of these outcomes, follow ups not achievable, can be used when it becomes reasonable to conclude that the case manager will not be able to record the employment outcomes for a client. ENS business expertise unit has advised that it can be considered reasonable to use this outcome after 3 attempts have been made to contact the client. These attempts at contact should use various methods such as telephone, email and letters.

The second of these outcomes, new case required, can be used to exit follow up in order to allow for the creation of a new case in LaMPSS. With a 52 week follow up period, it is possible a client may once again engage the services of an external service provider while a previous case is still in follow up status. In this situation, the case in follow up will need to be closed to allow for the creation and progress of a new case. The client or their case manager will contact the case manager for the case in follow up status and request that the case be closed. This will be done on the case status screen using this reason code.

The third of these outcomes, left labour force, can be used to close the case in situations where the client is no longer pursuing employment and has left the labour force. *Ask participants for examples!*

Manually Close Case from Follow Up

To close the case with any of the reasons we outlined on the last slide, you will use the case status screen to manually close the case. *<click to reveal>* The case status screen will show the progression of a case through each stage of the case lifecycle.

To change the status of the case, click the add button seen here. *<click to reveal>* A new row is created at the top of the case status module with a drop down menu for you to select the new status of the case. *<click to reveal>* Select closed *<click to reveal>* and then choose a reason code from the second drop down menu. *<click to reveal>* In this case the case manager has indicated that follow ups were not achievable. The case notes icon can be used to add additional details to explain why follow ups cannot be done. To complete the process click the save button at the top of the bottom of the screen. *<click to reveal>*

Remember, once a case is closed it cannot be reopened for any reason so you should think through these steps very carefully before completing them in LaMPSS! There is no warning message after you select save, so ensure you are ready to close the case before selecting save!
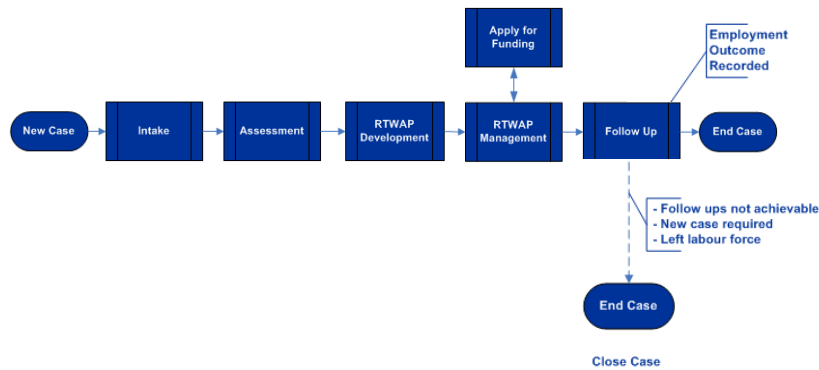
Let's take a final look at the case management lifecycle diagram. From follow up status you will see the three reasons we've just reviewed to exit follow up and close a case early. *<click to reveal>* Once again, those reasons are that follow ups are not achievable, a new case is required, or the client left the labour force.

Otherwise, each of the employment outcomes will be recorded. *<click to reveal>* When the final, 52 week employment outcome is entered in LaMPSS the case is closed. This brings the case management lifecycle to an end.
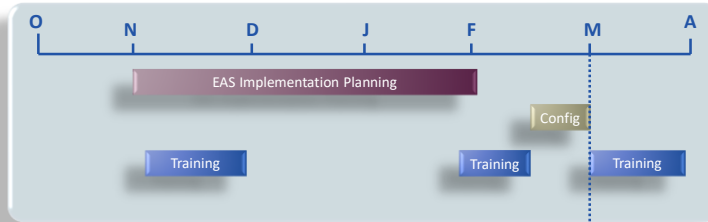
Before we finish up case training, let's talk about some of the next steps for case management staff.

Next Steps

➤ Training, Configuration & Implementation is Complete

➤ Pre-recorded learning modules for review & additional learning are available online

➤ LaMPSS Operations Support – LaMPSS@gov.ns.ca

<click to reveal> Over the past few months, each of your organizations has participated in a series of implementation planning activities culminating in the configuration of LaMPSS for your organization in February. During this period, a series of training events have been held for case management staff leading up to this 2 day classroom session. Release 2 of LaMPSS was launched at the beginning of March and when you return to your office you will be able to start using the solution.

<click to reveal> As you begin using LaMPSS you will have access to a series of pre-recorded learning modules to review what we covered in classroom training and to gain some additional knowledge on other parts of LaMPSS functionality for case management users.

<click to reveal> Your first point of contact if you encounter any difficulties or have questions will be the LaMPSS Operations Support team.   Please contact them at the email address seen here.

Agenda

- ➤ Welcome & Objectives
- ➤ LaMPSS Refresher
- ➤ Case Management Lifecycle
  - ❑ Intake
  - ❑ Assessment
  - ❑ RTWAP Development
- ➤ Enhanced Services
- ➤ Case Management Lifecycle
  - ❑ RTWAP Management
  - ❑ Follow Up
- ➤ Next Steps
- ➤ Conclusion & Wrap Up

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Objectives

- ➤ To refresh your knowledge of the fundamentals of the LaMPSS solution
- ➤ To learn the business processes and system functionality associated with the case management lifecycle
- ➤ To get some hands-on experience with LaMPSS case management

Our goal at the beginning of training was to make sure you were exposed to the typical activities that fall within the scope of your role in LaMPSS. The objectives outlined at the beginning of day 1 are seen here.

 What did we learn?

• Refreshed your knowledge of the LaMPSS solution

• Completed a detailed review of each part of the case management lifecycle

• Participated in hands-on exercises and demonstrations to learn how to use LaMPSS

Conclusion & Wrap Up

➢Questions?

➢Where to go for more information?
  ❑ LaMPSS@gov.ns.ca

Before we wrap up, does anyone have any additional questions?

Once again, if you have any questions or concerns, please contact the LaMPSS Operations Support team at the email address seen on this slide. Alternately you can get in touch with your regional EAS Champions within Employment Nova Scotia.

Before I let you go if you could take a minute to complete a training evaluation form to tell us how we did that would be greatly appreciated!

Collect the completed evaluations from the participants

Thank everyone for their active participation.

Appendix A – List of Exercises/Demos

1. Sign-In Exercise
2. Search/Add Person Exercise
3. Update Person Details Exercise
4. Add Case Exercise
5. Complete Intake Exercise
6. Enter Case Information Exercise
7. Enter Education & Experience Exercise
8. Transfer Case Demonstration
9. Add Case Notes Exercise
10. NOC Search Demonstration
11. Enter Needs Determination Exercise

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Appendix A – List of Exercises/Demos

12. Complete Assessment Task Exercise
13. Add Interventions Exercise
14. Print/View Plan Exercise
15. Complete RTWAP Development Exercise
16. Initiate Intervention Exercise
17. Apply for Funding I Exercise
18. Apply for Funding II Exercise
19. Apply for Funding III Exercise
20. Practice Using Notifications Exercise
21. Practice using Tasks Demonstration
22. Close Action Plan Task Demonstration