Labour Market Programs Support System (LaMPSS)

Release 2 Case Training Workbook

LaMPSS External Case Management

Case Training - Exercises and Demos

Before you begin

To begin each exercise you will first need to log-on to LaMPSS by following these steps:

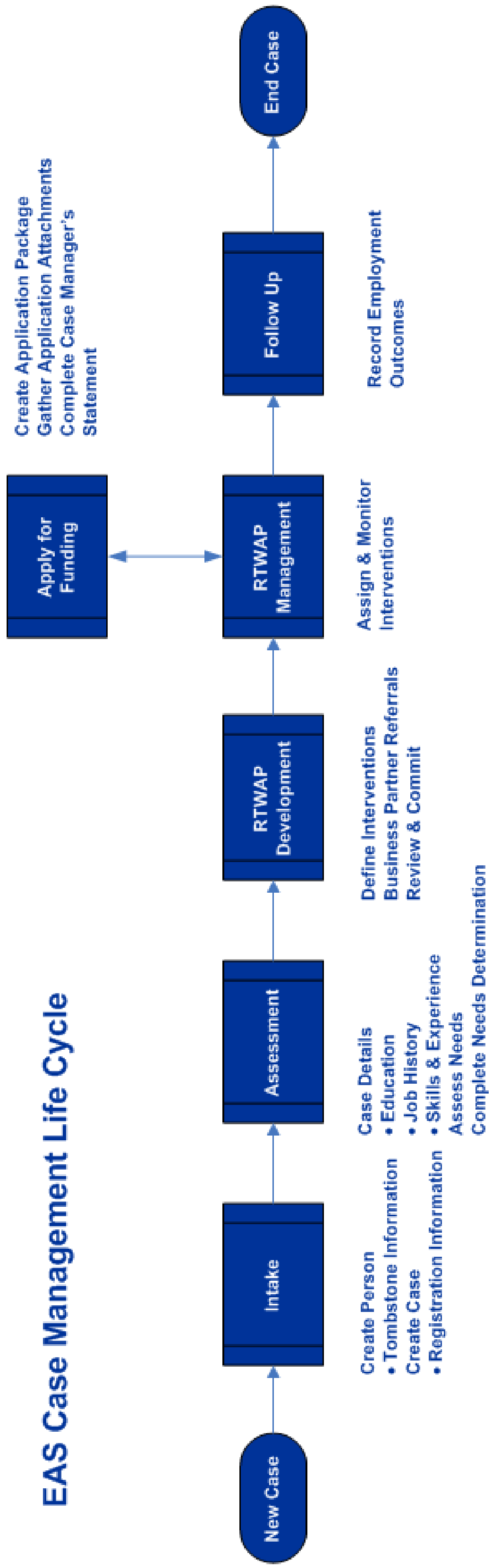
1. Navigate to the LaMPSS website <https://lampss-prep.gov.ns.ca>.
2. Type your organization ID, user ID and password in the corresponding fields.
3. Review the Terms of Use and select the checkbox to "Agree to terms of use."
4. Click Login**.** You will be directed to your user homepage. This is the starting point for each exercise and demonstration.

A forgotten password can be reset by clicking on the button reading "Forgot your password?" at the bottom of the page. Your credentials for accessing the system will be verified and a new password will be sent to the primary email address on your account.

System-Generated Task Due Dates

Each system-generated task for a case is automatically assigned a due date in LaMPSS. Use the following chart for reference or as a desk aide to understand the timelines associated with each task in the case management lifecycle.

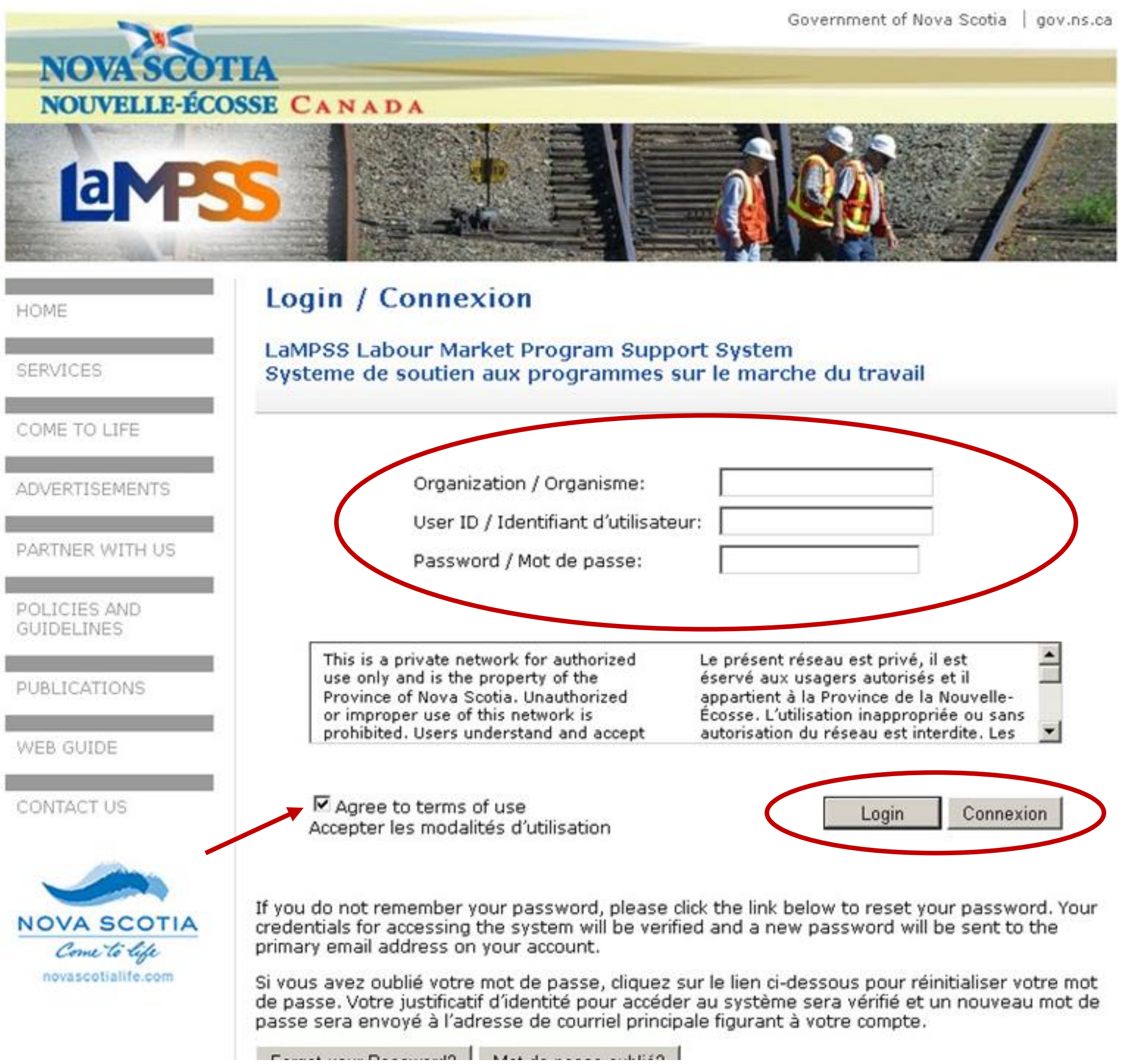
Complete Intake	**Current Date +**	**7 days**
Complete Assessment		**28 days**
Develop Action Plan		**14 days**
Close Action Plan	**Last Planned Intervention End Date +**	**28 days**
24 Week Outcome		**24 weeks**
52 Week Outcome		**52 weeks**


EAS Case Management Life Cycle
New Case
Intake
Assessment
RTWAP Development
RTWAP Management
Apply for Funding
Follow Up
End Case
Create Person
• Tombstone Information
Create Case
• Registration Information
Case Details
• Education
• Job History
• Skills & Experience
Assess Needs
Complete Needs Determination
Define Interventions
Business Partner Referrals
Review & Commit
Assign & Monitor Interventions
Create Application Package
Gather Application Attachments
Complete Case Manager's Statement
Record Employment Outcomes

LaMPSS Sign In Exercise

1. Navigate to the LaMPSS website by clicking the icon on your desktop or navigating to <https://lampss-prep.gov.ns.ca>. Please have your organization ID, user ID and password ready!
2. Type your organization ID, user ID and password in the corresponding fields as illustrated below.
3. Click Login. You will be taken to your user homepage.

Please do not share your login credentials with anyone. Your login information and user ID are what LaMPSS uses to direct you to your customized user homepage with notifications and tasks assigned specifically to you. Any actions you complete in the system are also tagged with your user ID.



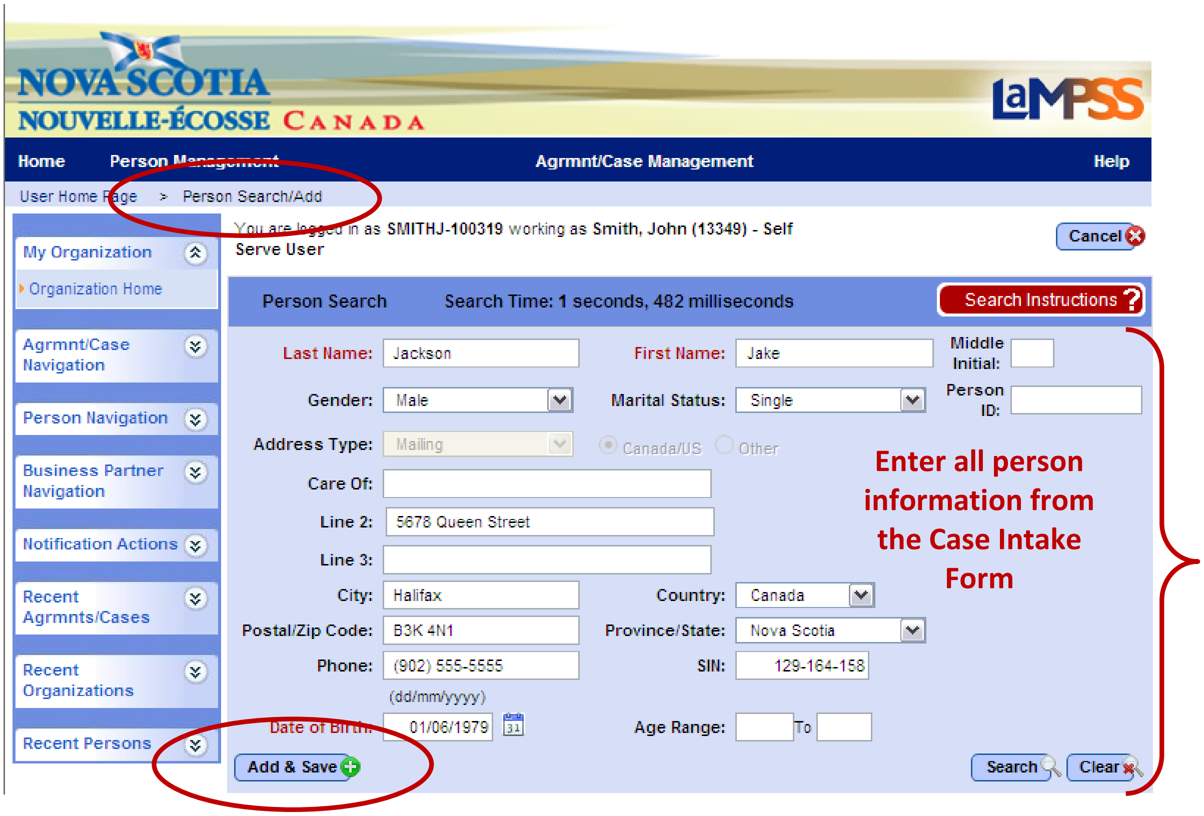
<<end of exercise>>

SEARCH/ADD PERSON EXERCISE

Before beginning this exercise review the person information on the Case Intake Form provided at the end of this training workbook.

1. Navigate to the **Person Search/Add Screen** by clicking person management in the top navigation menu.
2. Search for the client by SIN:
    - Enter 9 numbers in the SIN field without spaces/hyphens (i.e. 123456789)
    - Two asterisks (**) will appear next to the field if an invalid SIN is entered
    - Click Search
3. No search results are found. Click clear to reset the person search criteria.
4. Search for the client by last name:
    - Enter the client's last name (found on the Case Intake Form) in the last name field
    - Click Search

    Why search this way? *If you enter additional search criteria, the application may exclude the person you are searching for in the search results. In this case you may think that the person does not exist in the registry and add a duplicate record.*
5. Person search results may appear at the bottom of the page; however, your client is not listed. Complete the data entry of the person information, including all information available on the Case Intake Form, such as:
    - Last Name
    - First Name
    - Middle Initial
    - Gender
    - Marital Status
    - Address
    - Phone
    - SIN
    - Date of Birth



6. Click add & save. If any required information has not been provided or LaMPSS identifies invalid information a red error message will display at the top of the screen. Otherwise, the person record is created and you will be taken to the newly created **Person Homepage**.

As you complete this exercise, take a few moments to become familiar with the menu options and various sections of the Person Homepage.

<<end of exercise>>

UPDATE PERSON DETAILS EXERCISE

1. Navigate to the **Person Homepage** by clicking the recent persons section of the left navigation menu.
2. Click on the Person ID and name of your client to access their homepage.
3. Click the person details link in the left navigation menu under person actions. The **Person Details Page** will appear displaying the information you entered to create the person record. Review the Case Intake Form and, if necessary:
    - Enter any additional information available about the client such as service language, addresses, phone numbers or email.
    - Enter any known first name and/or last name aliases.
    - Click cancel to return to the **Person Homepage** at any time without saving your changes.
4. Click Save. Your changes will be saved and you will be returned to the **Person Homepage.**
5. Review the person record to ensure you have entered all information, including the Social Insurance Number, accurately for your client.

    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 the person details in LaMPSS!*

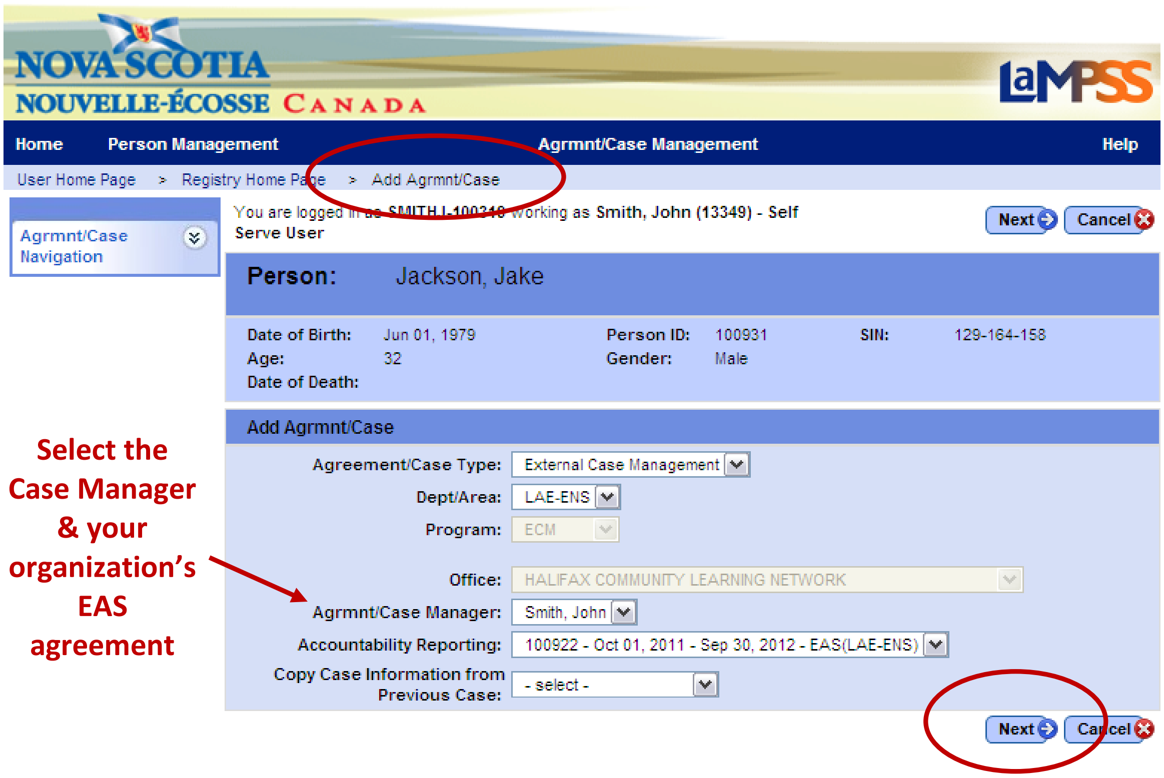
<<end of exercise>>

ADD CASE EXERCISE

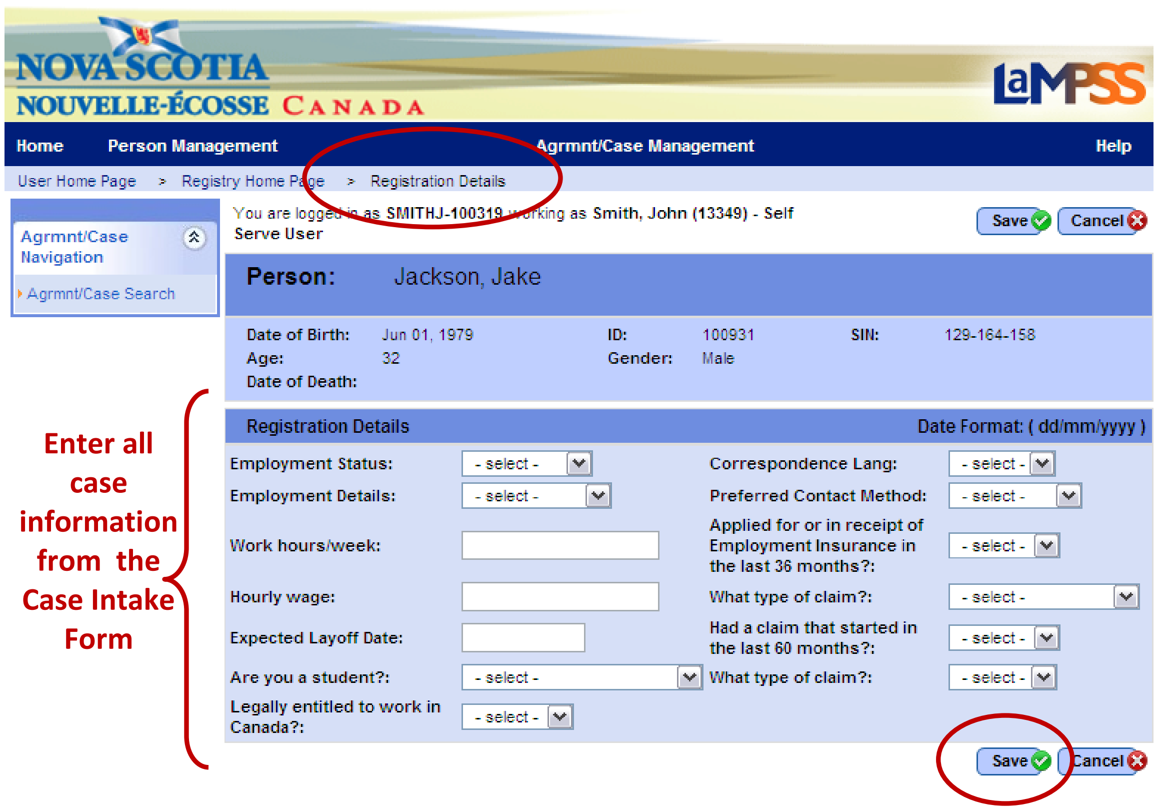
1. Navigate to the **Person Homepage** by clicking the recent persons section of the left navigation menu.
2. Click on the Person ID and name of your client to access their homepage.
3. Click the create case link in the left navigation menu under person actions. If the person has not yet been shared with NS government the **Privacy and Accountability Page** will appear.
4. Click share. This indicates that the case being created and client information should be shared with the Province. LaMPSS will search Nova Scotia Government person records to find potential matches for the client.
   - If a match or potential matches are found, LaMPSS will display those matches and wait for you to select which match you would like to merge with the person record.
   - If no match is found, LaMPSS will display messaging and ask you to select the next button to complete the process of sharing the person information with the Nova Scotia Government.

5. Click next. This allows you to proceed without merging the person record with any potential matches. You will be redirected to the **Add Agrmnt/Case Page**.

6. Complete the following fields by making selections from the drop-down menus:
    - Agrmnt/Case Manager – Select a case manager.
    - Accountability Reporting – Select your organization's EAS agreement. **Do not select Private.**
    - Copy Case Information from Previous Case – Select a case. Available only if the client has had previous cases with your organization.



7. Click next. You will be redirected to the **Registration Details Page**.
8. Complete the fields on this page. The following four fields are mandatory; however, all available information should be recorded by entering text or making selections from the drop-down menus:
    - Correspondence Language
    - Employment Status
    - Are you a student?
    - Preferred Contact Method



9. Click save. You will be redirected to the newly created **Case Homepage**.
10. Write down the six-digit case ID number that appears near the top of the page.

As you complete this exercise, take a few moments to become familiar with the menu options and various sections of the Person Homepage.

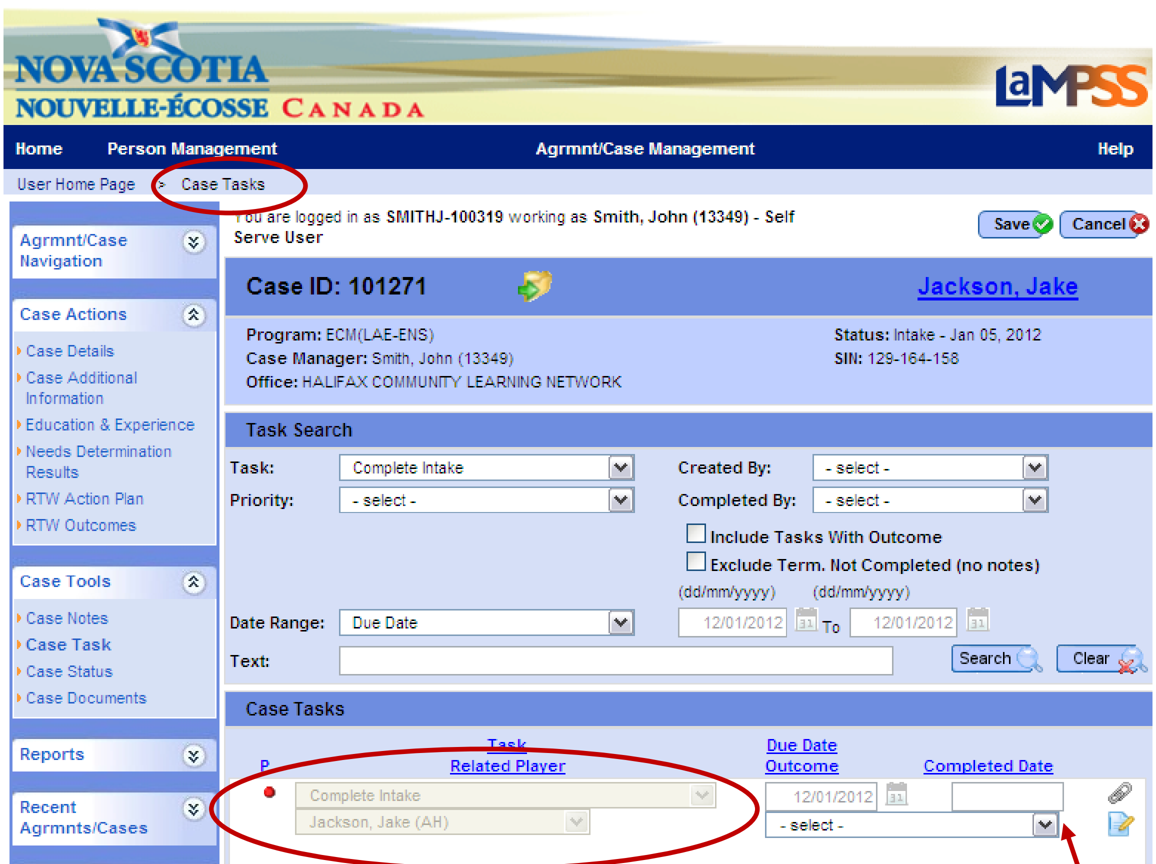
<<end of exercise>>

Complete Intake Exercise

1. In the “My Task Items Due/Overdue” section of your user homepage locate the intake task for your case/client.
2. Click on the task name (“Complete Intake”) to navigate directly to the **Case Task Page**.
    - The intake task will be displayed in the case tasks section of the page

-OR-

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
    - In the “Case Tasks” section of the homepage locate the intake task and click on the task name (“Complete Intake”) to navigate to the **Case Task Page**.
    - The intake task will be displayed in the case tasks section of the page.



Select an Outcome from the drop-down menu

3. Select an outcome from the drop-down menu. For this exercise, please indicate that the intake process is complete.

- Please remember that selecting an outcome of self-serve only, group services only, or referred out will close the case. This action cannot be reversed.

4. Click save. You will be redirected to the **Case Homepage**.

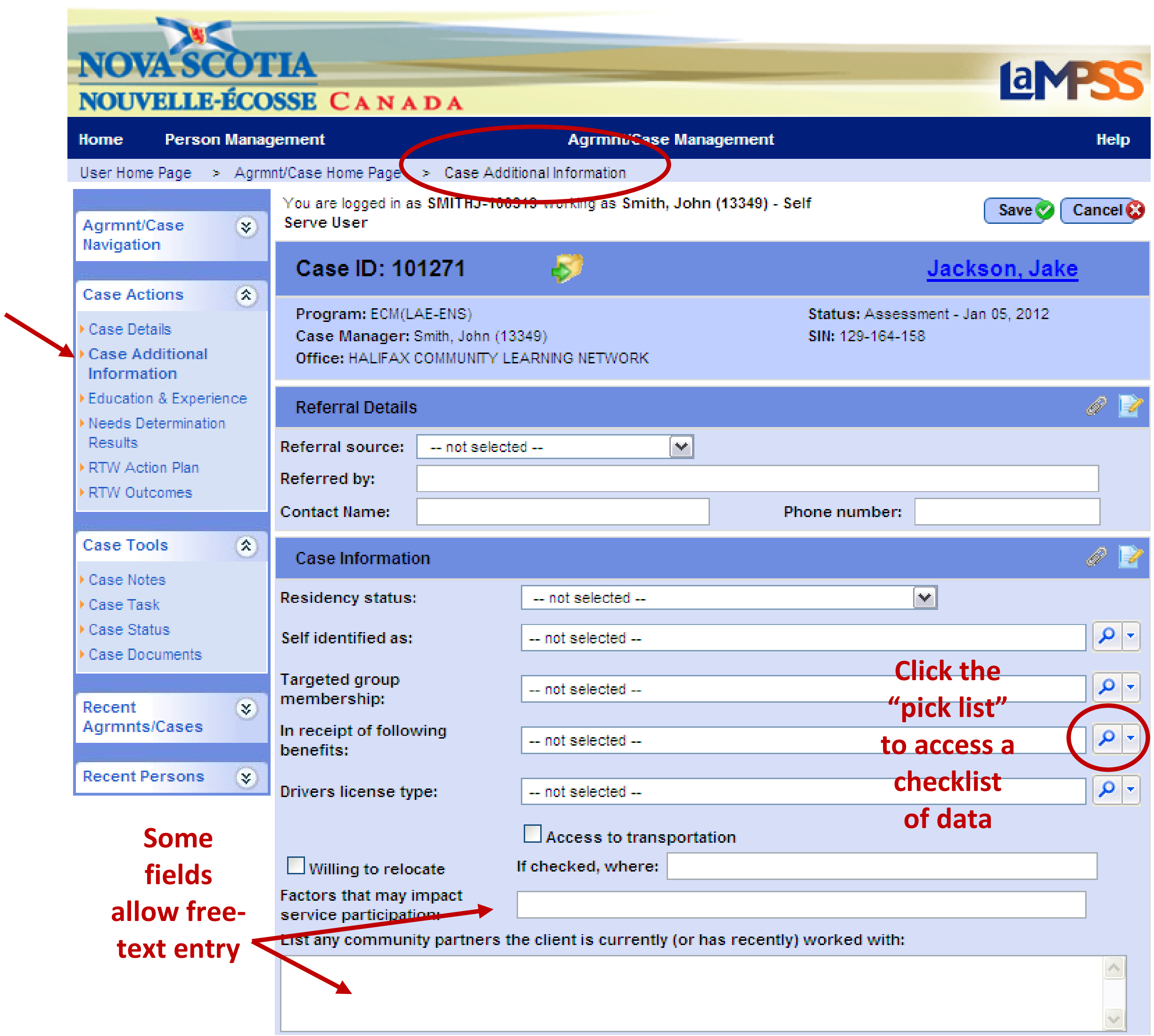
5. Notice that:

- The case header displays the updated status of assessment
- A new task ("Complete Assessment") was automatically generated by LaMPSS when the intake process was completed.

<<end of exercise>>

ENTER CASE INFORMATION EXERCISE

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the additional case information link in the left navigation menu under case actions. You will be taken to the **Case Additional Information Page**.
4. Complete the fields in the referral details/ case information sections of the page. While there are no mandatory fields that must be completed to save the page, all available information should be recorded by entering text or making selections from the drop-down menus/pick lists.



***Remember,** you can save your progress at any time by clicking save at the top/bottom of the page! When a case screen is saved, LaMPSS will redirect you to the Case Homepage. Follow steps 1, 2 & 3 of this exercise to navigate back to this page.*

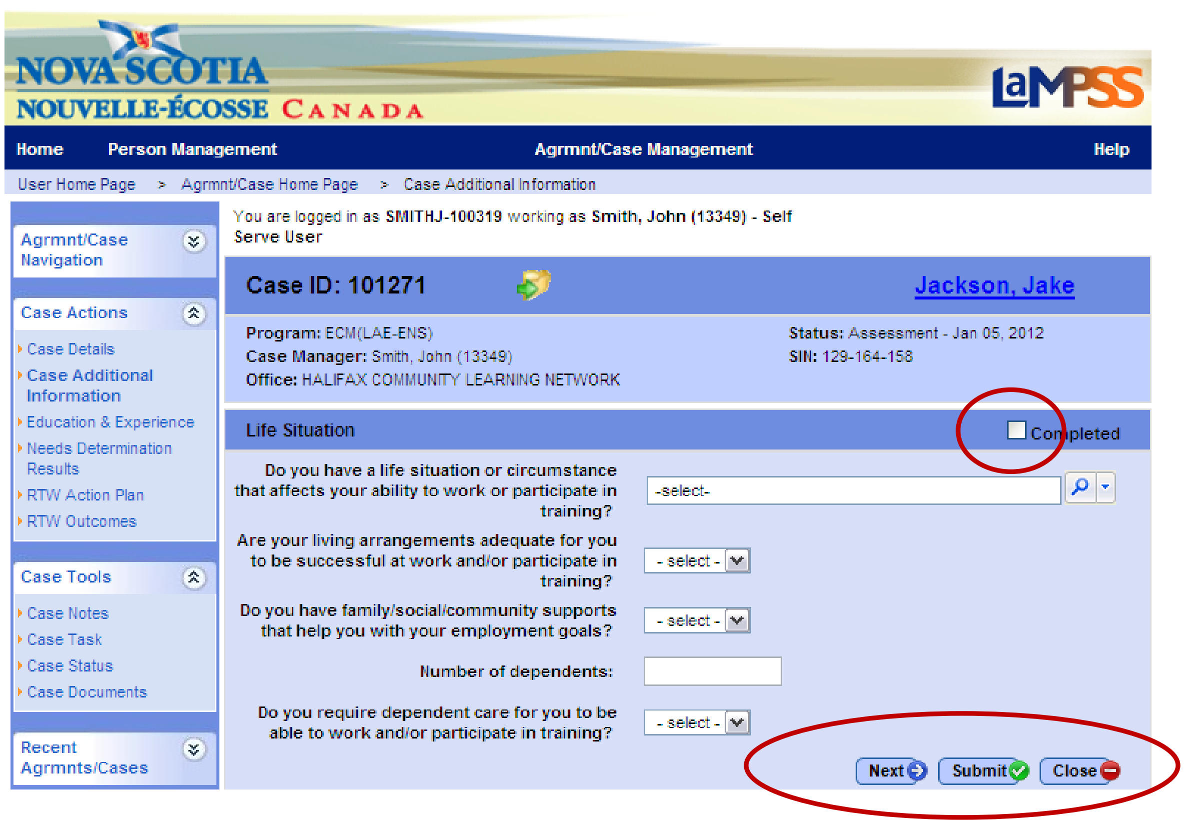
5. Determine if there are any modules listed in the additional case information section at the bottom of the **Case Additional Information Page**.
    - If no, all case information has been entered. Click save. Move onto the next exercise.
    - If yes (see example below), continue on to steps 6, 7, and 8.

This section may include 0-4 modules.

Additional Case Information

Module Name	Required	Status	Last Updated	Update By	
Life Situation	No	Not Started	-	-	
Legal Status	No	Not Started	-	-	

6. Select an additional case information module by clicking on the blue, hyperlinked module name. The selected module will open.
7. Complete the fields in the additional case information module.
    - The specific questions in each module as well as the order in which they appear on the page is dependent on your organization's LaMPSS configuration.



8. Select the checkbox in the module header (see example above) to indicate that all data has been entered.

- Please note, if the module is required by your organization, all information must be entered and this checkbox selected before LaMPSS will allow you to complete the assessment task for the case.

9. Click submit. You will be returned to the main **Case Additional Information Page**.

- When more than 1 additional case information modules exist, the next button (see example above) can be used to navigate directly from one module to the next.

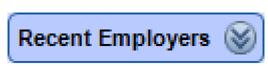
10. Click save. All updates to the **Case Additional Information Page** will be saved. You will be redirected to the **Case Homepage**.

<<end of exercise>>

ENTER EDUCATION & EXPERIENCE EXERCISE

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the education and experience link in the left navigation menu under case actions. You will be taken to the **Education & Experience Page**.
4. Complete the fields in the education/training section of the page. Use the add another button to provide details on all past and current education and training, including any training or courses funded by ENS. For each record provide:
    - Education/Training/License name
    - Source/Location
    - Results
    - From/To dates

    *A **minimum** of one row of information must be entered before assessment can be completed.*
5. Click add another in the employment history section of the page. The **Employment Details Page** will appear.
6. Complete the fields on this page. The following six fields are mandatory; however, all available information should be recorded:
    - Employer Name

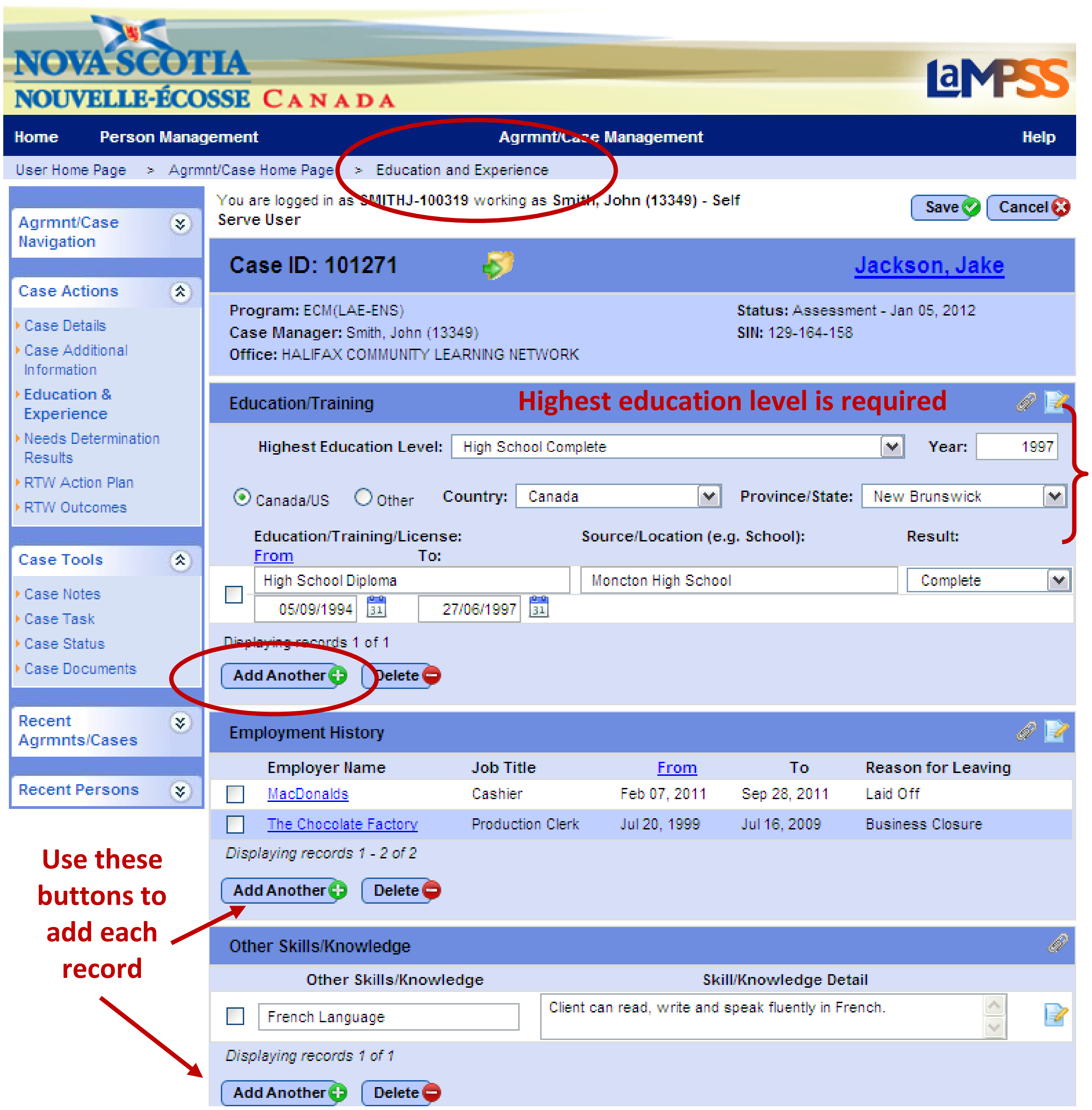
    Selecting an employer from the 

 drop-down will auto-fill the address section.

    - Employer Address
    - Job Title
    - NOC Code
    - From date
    - Employment Type
7. Click submit. You will be returned to the **Education & Experience Page**.
8. Repeat steps 5-7 for each instance of employment.

*You should capture the client's 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.*

9. Complete the fields in the other skills/knowledge section of the page. Use the add another button to add as many rows as required. For each record provide:
   - Skill/Knowledge name
   - Skill/Knowledge Detail



10. Click save. You will be redirected to the **Case Homepage**.

<<end of exercise>>

TRANSFER CASE DEMONSTRATION

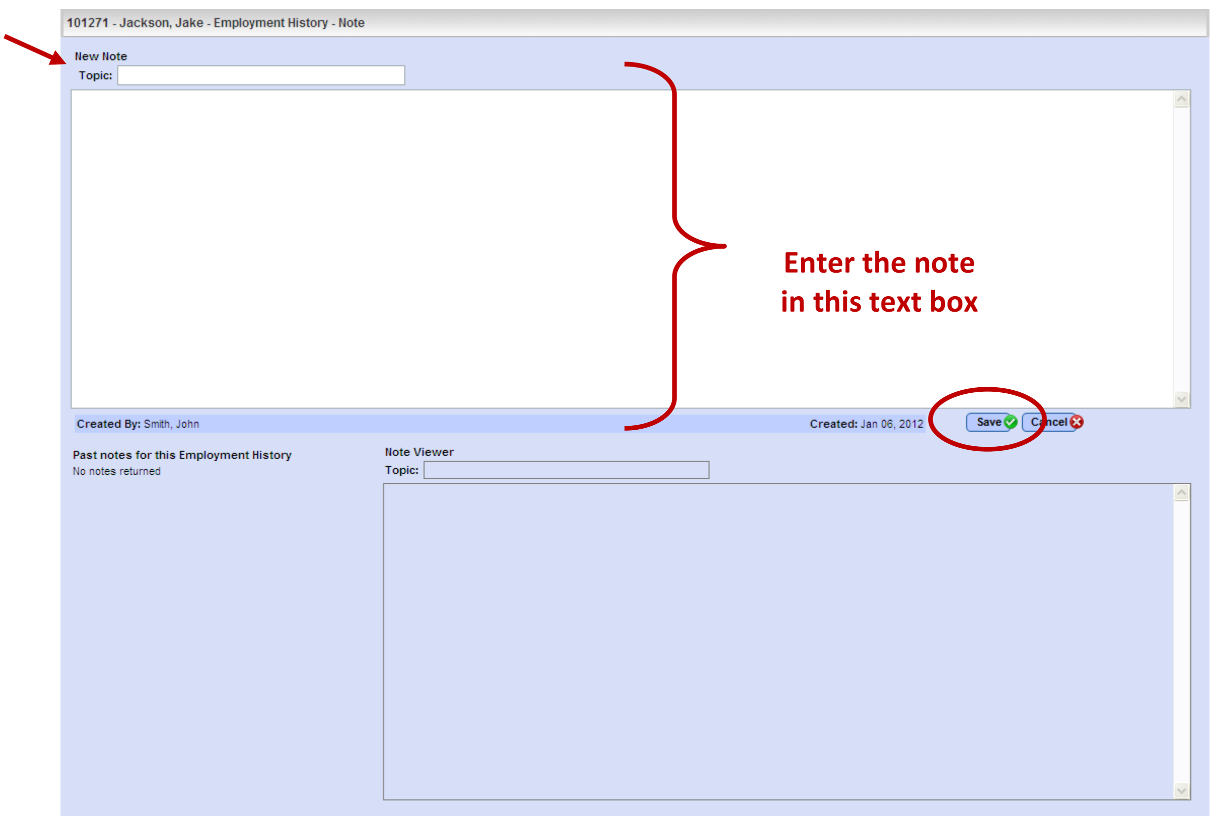
1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the case details link in the left navigation menu under case actions. You will be taken to the **Case Details Page**.
4. In the case registration section of the page select the name of the Case Manager to transfer the case to using the drop-down menu (see example below).
    - Only staff from your organization/office will appear in the drop-down menu. Cases cannot be transferred from one organization to another.
5. Click Save. You will be redirected to the **Case Homepage**.

<<end of exercise>>

Add Case Notes Exercise

Case notes can be created, edited and viewed at various stages of a case. Use the steps below to create a case note anywhere the add note icon  *appears on a LaMPSS screen.*

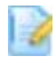
1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the education and experience link in the left navigation menu under case actions. You will be taken to the **Education & Experience Page**.
4. Click on the add note icon. The new note window will appear.
   - The add note icon appears in several places on this page. For this exercise you can use any one of these icons.
5. Complete the fields in the new note window.



***Remember,** 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.*

6. Click save. LaMPSS will conduct an automatic spell check of the note. Once the spell check is complete you will be redirected to the **Education & Experience Page**.

7. Notice that:

- The add note icon  has changed to the add/view notes icon .
- The add/view notes icon is used to add additional notes as well as to view/edit existing notes

***Please note,** best practice is always to create a new note to provide additional information instead of editing an existing note.*

8. Click the add/view notes icon. The note window will open with the previously created note in the lower left-hand corner under the past notes heading.

- To view the existing note click view. The note will appear in the note viewer.
- To edit the existing note click edit. Make the necessary revisions to the topic or body of the note.

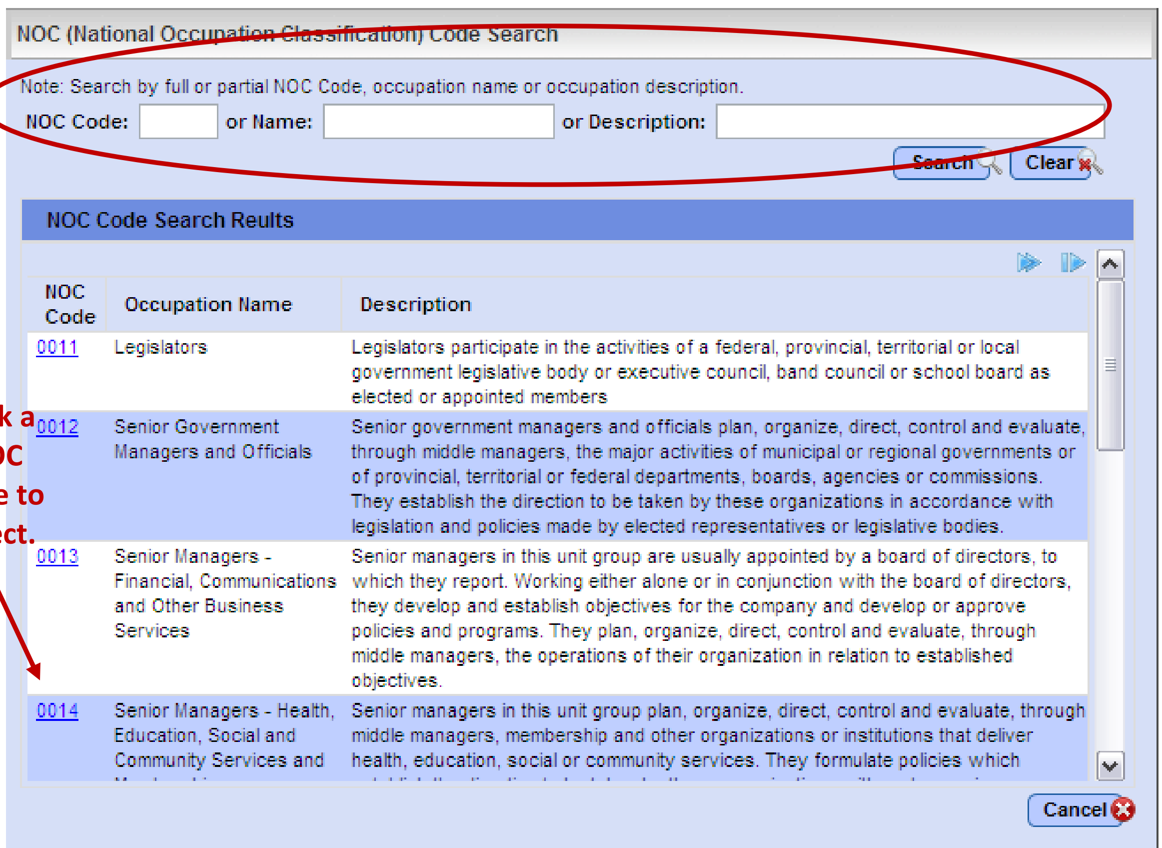
***Please note,** notes are locked for editing after 30 days.*

9. If any changes were made, click save. Otherwise click cancel to exit the note window. You will be redirected to the **Education & Experience Page**

<<end of exercise>>

NOC Code Search Demonstration

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the needs determination link in the left navigation menu under case actions. You will be taken to the **Needs Determination Results Page**.
4. Click the NOC search icon  in the employment goal section of the page. The NOC (National Occupation Classification) Code Search popup will appear.
5. Entering any of the following search criteria and click search:
   - NOC code – Enter the full or partial NOC code, if known
   - Name – Enter all or part of an occupation name
   - Description – Enter key words from an occupation description



Click a NOC Code to select.

6. Review the results in the NOC code search results section of the window.

- If necessary, revise the search criteria.

7. Select by clicking the blue, hyperlinked NOC code. The NOC Search popup window will close and you will be returned to the **Needs Determination Results Page.**

<<end of exercise>>

ENTER NEEDS DETERMINATION EXERCISE

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the needs determination link in the left navigation menu under case actions. You will be taken to the **Needs Determination Results Page**.
4. In the needs determination section of the page, select "Add a new Needs Determination" in the version field from the drop-down menu.
5. In the employment goal section of the page, use the drop-down menu to select which of the following employment goals you have established with the client:
    - Full time employment
    - Full capacity employment
    - 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.*
6. Enter a job title in the job preference 1 field.
7. Click the NOC search icon to open the NOC (National Occupation Classification) Code Search popup window.
8. Search for and select a corresponding NOC code for job preference 1. Use the NOC Code Search Demonstration script for instructions.

    Remember, *you can save your progress at any time after this point by clicking save at the top/bottom of the page! When a case screen is saved, LaMPSS will redirect you to the Case Homepage. Follow steps 1, 2 & 3 of this exercise to navigate back to this page.*
9. Repeat steps 6-8 for each job preferences 2 & 3, if required.

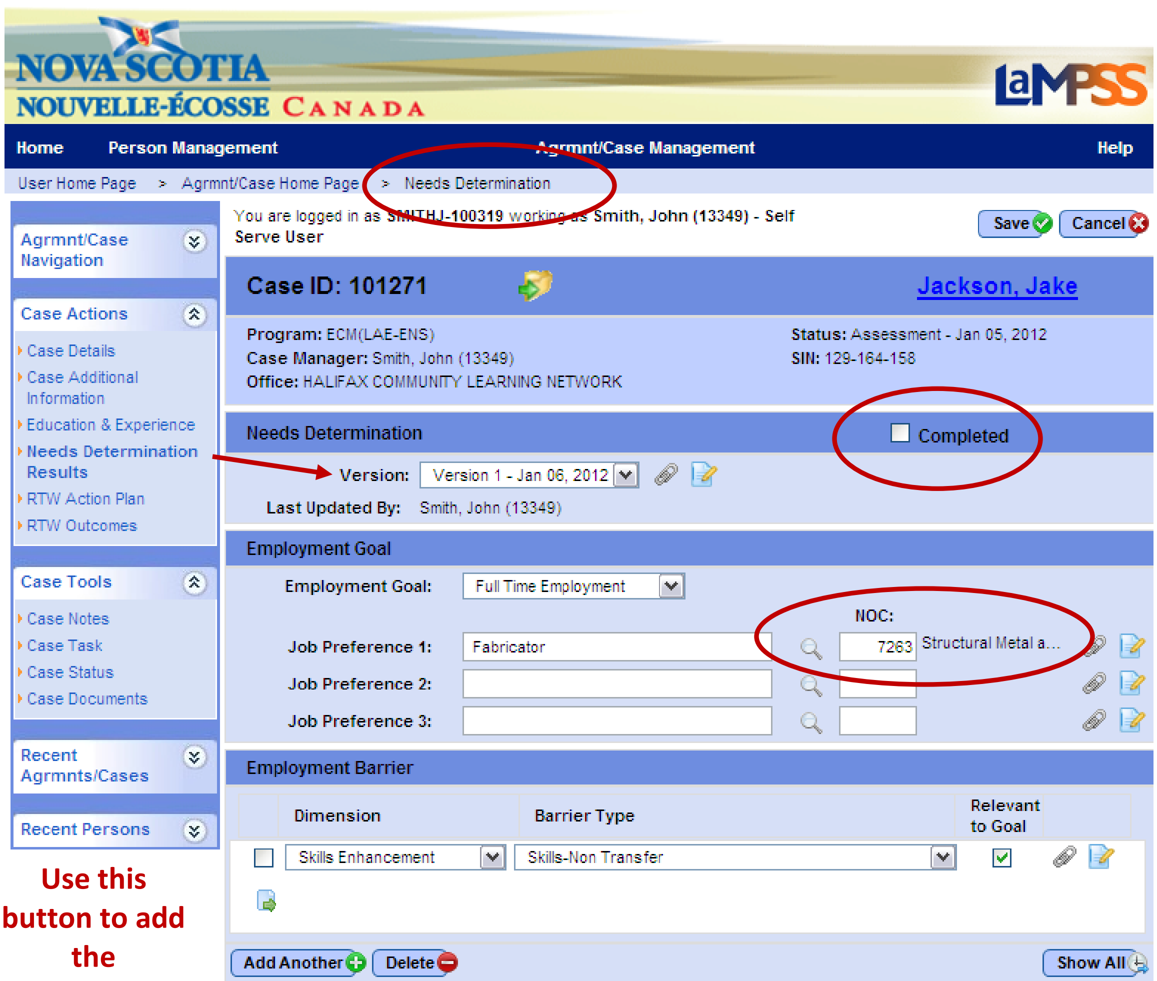
    Please note, *if a client is applying for funding and has more than one job preference identified on their needs determination the information submitted supporting any application for funding to ENS will need to address each of the job preferences listed.*

10. Click the add another button in the employment barrier section of the page. A new, blank row will be added to the page. Use the add another button to add as many rows as required. For each record provide:

- Dimension
- Barrier type
- Relevant to goal
- Barrier description (click the add/view barrier description icon to enter text describing each barrier)

***Remember**, use case notes to capture any relevant information! They are an important tool to capture the "thinking" that has gone on at different points in the case management lifecycle.*

11. Select the checkbox in the needs determination header to indicate that this version of the needs determination is completed.



Use this button to add the Employment Barrier description

12. Click save. A popup message will appear: “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?”

Please note, *a minimum of 1 version of the needs determination must be completed before the case can move into RTWAP development status.*

13. Select OK. You will be redirected to the **Case Homepage**.

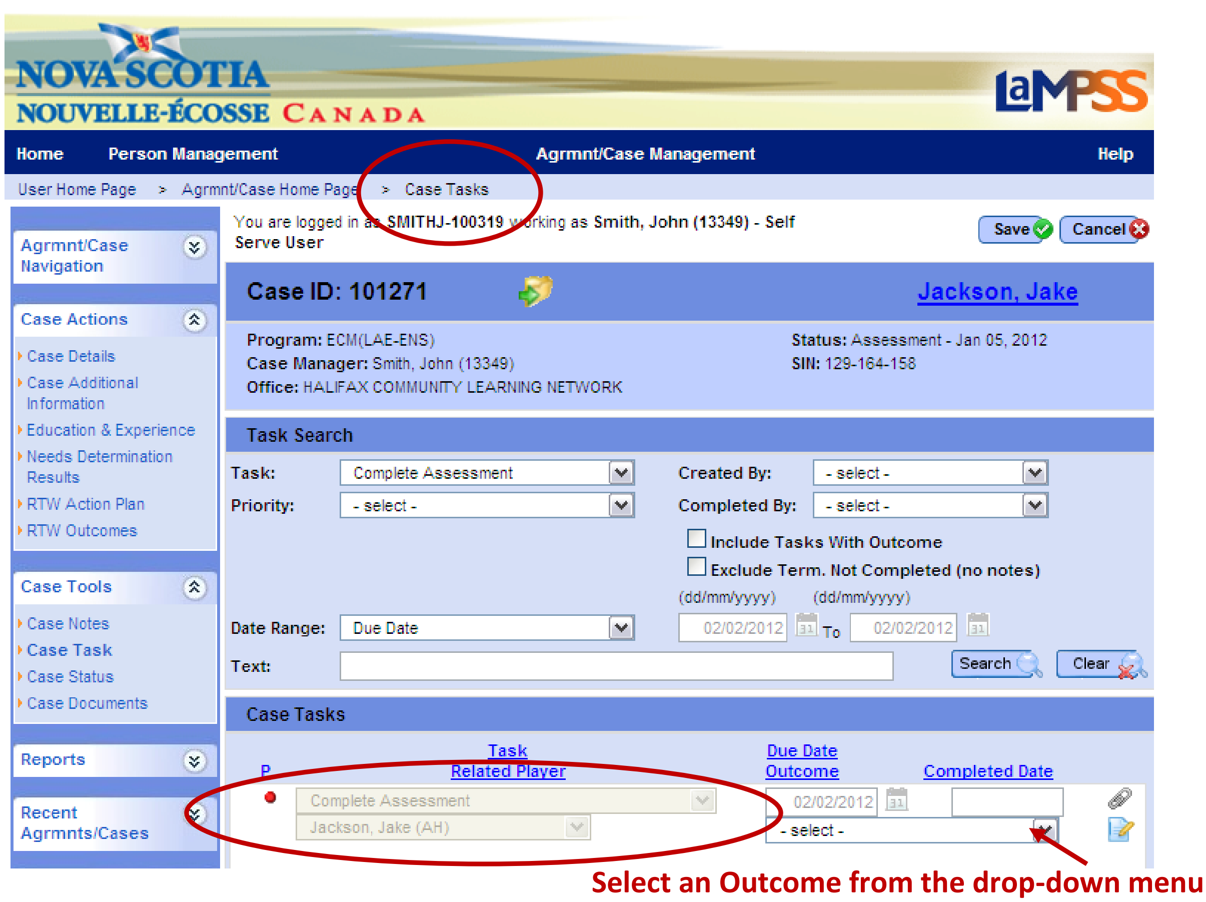
<<end of exercise>>

Complete Assessment Exercise

1. In the “My Task Items Due/Overdue” section of your user homepage locate the assessment task for your case/client.
2. Click on the task name (“Complete Assessment”) to navigate directly to the **Case Task Page**.
    - The assessment task will be displayed in the case tasks section of the page

-OR-

3. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
4. Click on the case ID and name of your client to access the homepage.
    - In the “Case Tasks” section of the homepage locate the assessment task and click on the task name (“Complete Assessment”) to navigate to the **Case Task Page**.
    - The assessment task will be displayed in the case tasks section of the page.



5. Select an outcome from the drop-down menu. For this exercise, please indicate that the assessment process is complete.

- Please remember that selecting an outcome of self-serve only, group services only, referred out or action planning not viable will close the case. This action cannot be reversed.

6. Click save. You will be redirected to the **Case Homepage**.

7. Notice that:

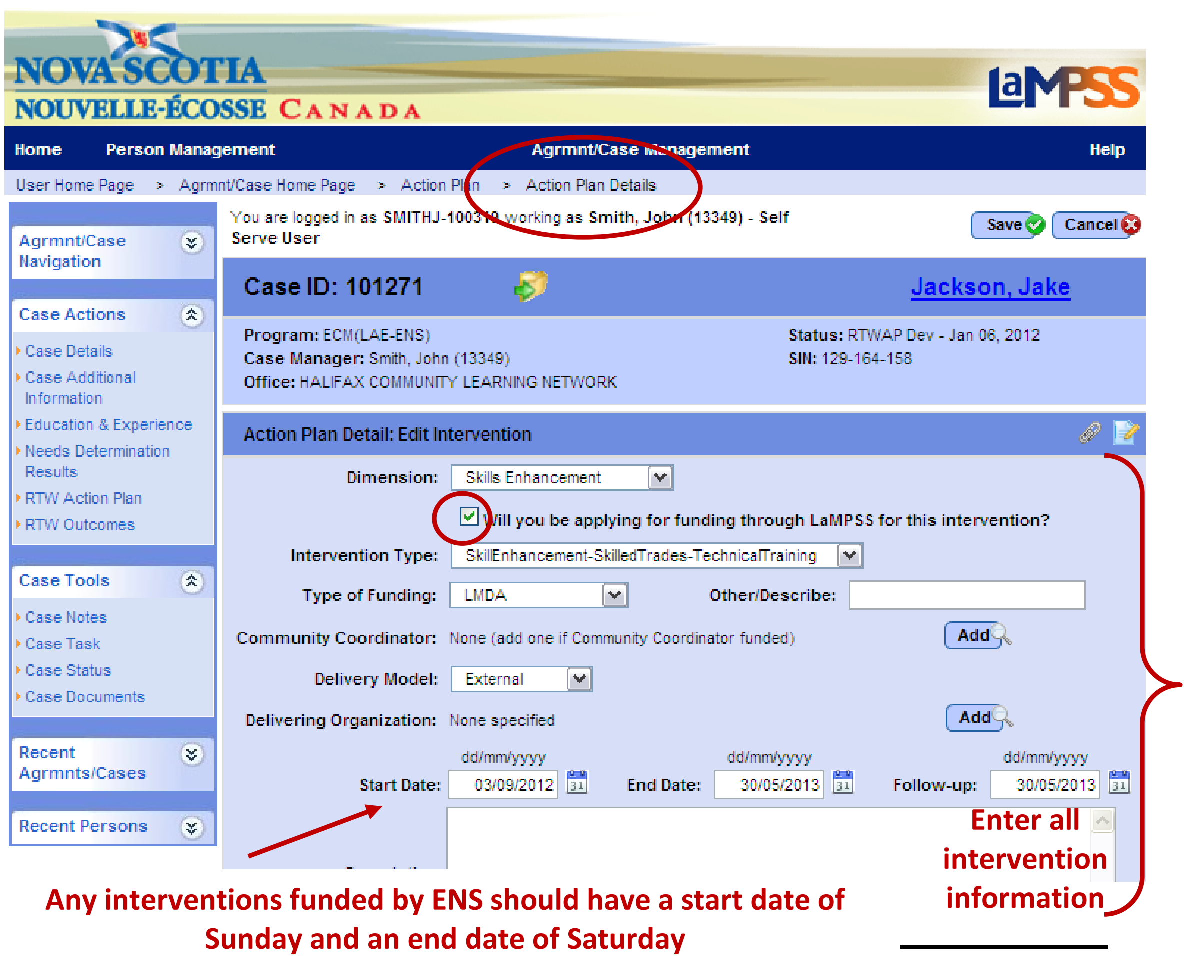
- The case header displays the updated status of RTWAP Dev.
- A new task ("Develop Action Plan") was automatically generated by LaMPSS when the assessment process was completed.

<<end of exercise>>

ADD INTERVENTIONS EXERCISE

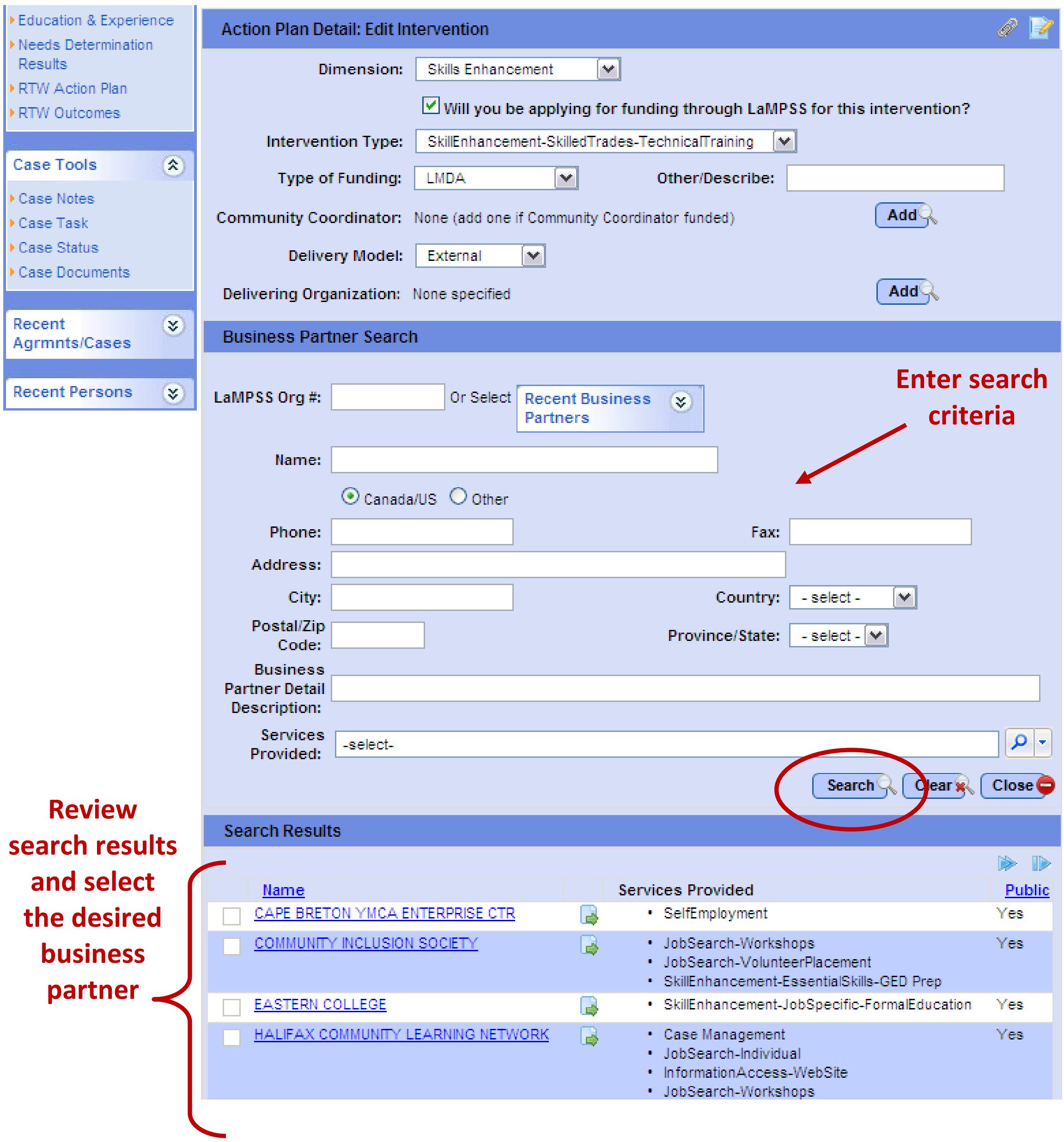
***Please note**, during this exercise you must add a minimum of 1 non-funded intervention and 1 ENS funded Skills Development intervention. Practice adding additional interventions if time allows.*

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the RTW action plan link in the left navigation menu under case actions. You will be taken to the **Action Plan Summary Page**.
4. Click add another. The **Action Plan Details Page** will appear.
5. Complete the fields on this page. The following six fields are mandatory; however, all available information should be recorded:
   - Dimension
   - Intervention Type
   - Type of Funding
   - Delivery Model
   - Start/End Date



Please note, *the checkbox for "Will you be applying for funding through LaMPSS for this intervention" should be used for any interventions that will result in an application for funding from an ENS program (e.g. Skills Development, Skills Up!)*

6. If the delivery model is external or the intervention will be funded by a community coordinator, click the corresponding add button. A business partner search section will open within the add intervention page.
7. Search for a business partner by entering search criteria in any of the fields including, but not limited to, name, address or services provided.
8. Click search. Any search results will appear at the bottom of the page.

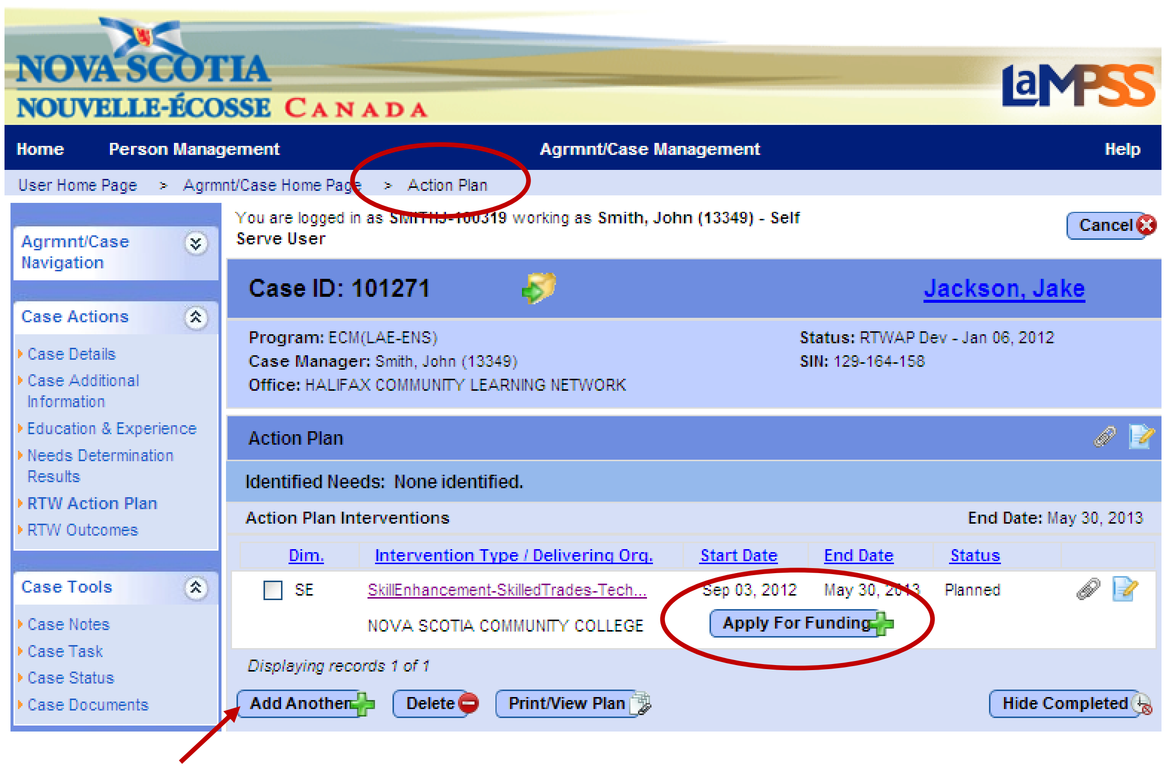


9. Select a business partner as the delivering organization/community coordinator by clicking the blue, hyperlinked organization name. The business parter search will close.

- The selected business partner is now listed on the **Action Plan Detail Page**.

10. Click Save. You will be returned to the **Action Plan Summary Page**. The newly added intervention will appear in the list of action plan interventions.

- If you selected the checkbox to indicate that this intervention will be associated with an application for funding, the apply for funding button will appear within the intervention on the **Action Plan Summary Page**.



11. Repeat steps 4-10, beginning by selecting the add another button, to add all desired action plan interventions.

<<end of exercise>>

PRINT/VIEW ACTION PLAN EXERCISE

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the RTW action plan link in the left navigation menu under case actions. You will be taken to the **Action Plan Summary Page**.
4. Click the print/view plan button. A file loading icon will appear.
5. A file download window will give you the option to open or save the action plan. Select open. The action plan report will open in a PDF format in a new browser or Adobe Reader window.

   The action plan has the following sections, with all the information being pulled from the case screens you have completed in LaMPSS:

   - Case Managing Organization
   - Application Information
   - Education History
   - Employment History
   - Other Skills/Knowledge
   - Employment Goals
   - Barriers to Employment
   - Action Plan (list of interventions)
   - Signatures

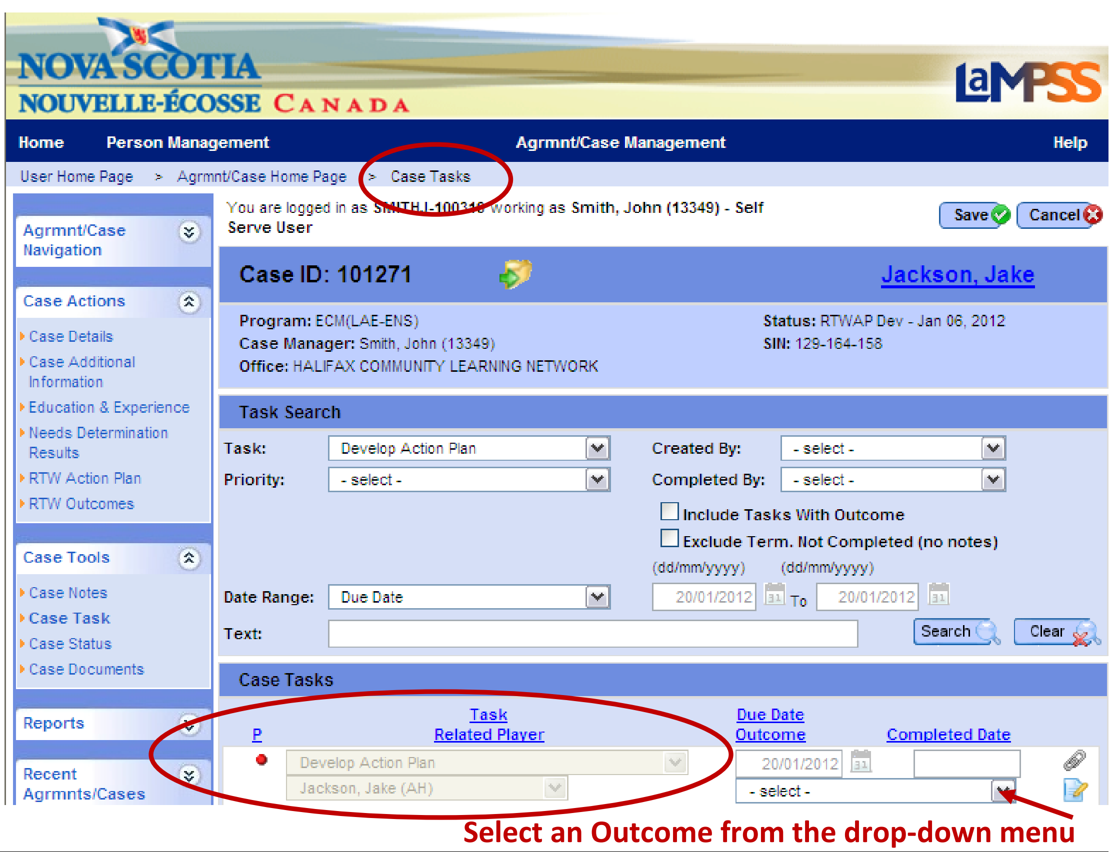
<<end of exercise>>

COMPLETE RTWAP DEVELOPMENT EXERCISE

1. In the "My Task Items Due/Overdue" section of your user homepage locate the develop action plan task for your case/client.
2. Click on the task name ("Develop Action Plan") to navigate directly to the **Case Task Page**.
    - The develop action plan task will be displayed in the case tasks section of the page

-OR-

5. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
6. Click on the case ID and name of your client to access the homepage.
    - In the "Case Tasks" section of the homepage locate the develop action plan task and click on the task name ("Develop Action Plan") to navigate to the **Case Task Page**.
    - The develop action plan task will be displayed in the case tasks section of the page.



8. Select an outcome from the drop-down menu. For this exercise, please indicate that the RTWAP has been developed and signed.

- Please remember that selecting an outcome of referred out or client not committed will close the case. This action cannot be reversed.

9. Click save. You will be redirected to the **Case Homepage**.

10. Notice that:

- The case header displays the updated status of RTWAP Mgmt.
- A new task (“Close Action Plan”) was automatically generated by LaMPSS when the action plan was recorded as developed and signed; however, the due date for this task is the last planned intervention end date plus 28 days. This task will only appear on the **Case Homepage** and **User Homepage** within 30 days of the due date.

<<end of exercise>>

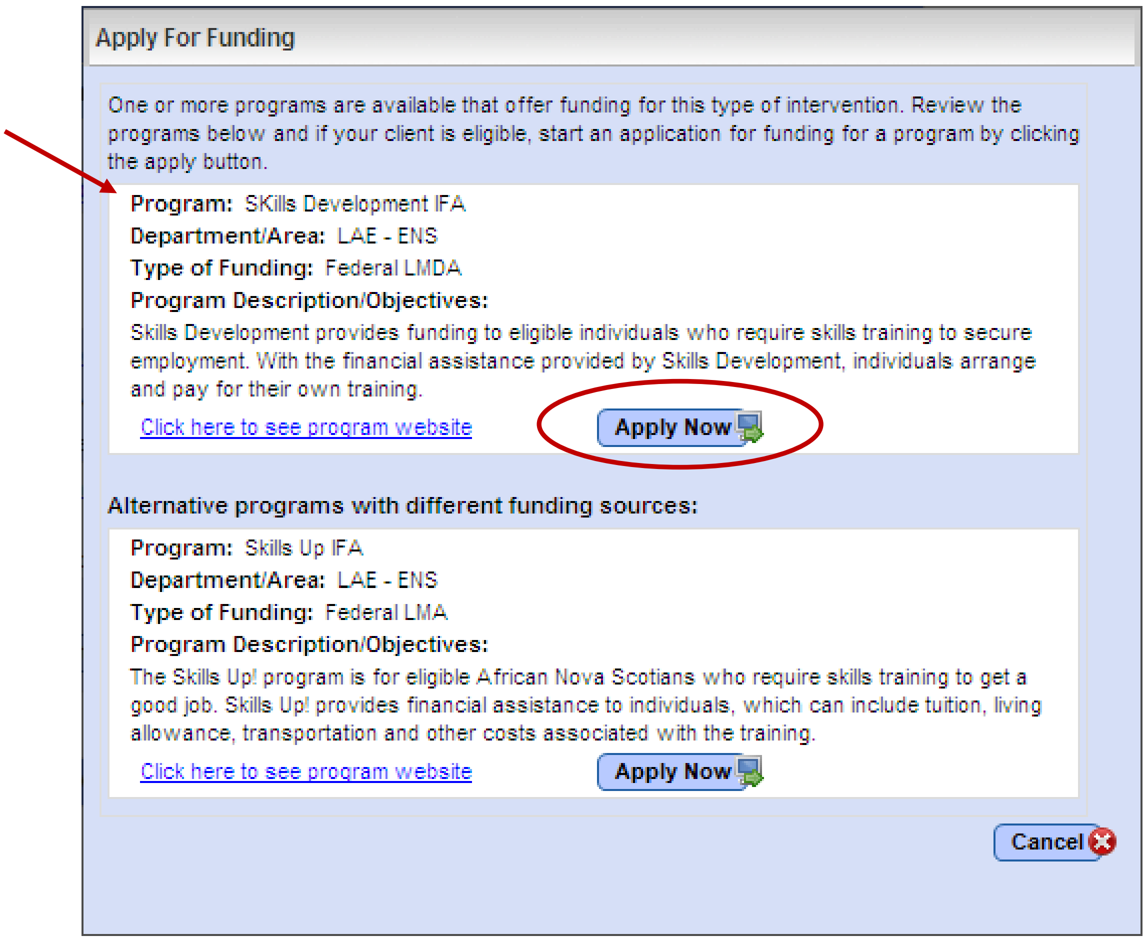
Initiate Interventions Exercise

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the RTW action plan link in the left navigation menu under case actions. You will be taken to the **Action Plan Summary Page**.
4. Click the blue, hyperlinked intervention in the action plan summary that you want to initiate. The **Action Plan Details Page** will appear.
5. Update the status from planned to in progress.
    - As a best practice, update the start date of the intervention to the actual start date, if different than what was originally entered.
    - Remember, ENS funded interventions should have a Sunday start date and a Saturday end date.
6. Click save. You will be returned to the **Action Plan Summary Page**.
7. Notice that:
    - The status of the intervention has been updated to in progress.

<<end of exercise>>

APPLY FOR FUNDING (PART 1) EXERCISE

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the RTW action plan link in the left navigation menu under case actions. You will be taken to the **Action Plan Summary Page**.
4. In the action plan, select the Apply For Funding button in the row of the appropriate intervention. The apply for funding popup will appear:



5. Click apply now for the Skills Development IFA program. You will be re-directed to the application package screen.
6. Review the items listed in the case elements section of the application checklist. If any case elements have a status of incomplete, navigate to the associated screen and enter all required information to complete that case element:
   - E.g. If needs determination is showing as incomplete, navigate to the **Needs Determination Results Page** and ensure you have completed at least the 1st version of the needs determination.
7. Click save. You will be re-directed to the **Action Plan Summary Page**.

<<end of exercise>>

Apply for Funding (Part 2) Exercise

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the RTW action plan link in the left navigation menu under case actions. You will be taken to the **Action Plan Summary Page**.
4. In the action plan, select the Edit Application button in the row of the appropriate intervention. You will be returned to the application package screen you were working on in the previous exercise.
5. Review the items listed in the forms/documents section of the application checklist. If any forms/documents have a status of missing you must attach a document OR indicate that the document will be submitted as a hard/paper copy. If any forms/documents have a status of optional you wil need to determine whether that form/document should be submitted with the application for your client.

Forms / Documents	Status	Paper	Date
Acceptance Letter	Missing		
Labour Market Research	Missing		
Job Search Report	Missing		
Family Size and Financial Statement	Missing		
Resume	Missing		
Program Cost List	Missing		
SD Worksheet	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		

Attach each document using the paperclip icon

6. For the purposes of this exercise we will create a sample document that you will attach to the application package. Although this would not work in the 'real world', because ENS verifies all document attachments you submit with an application, for training this will allow us to submit our application package without spending too much time creating the required documents. The steps to create this sample document are as follows:
    - *Navigate to the desktop of your computer*
    - *Right click your mouse*
    - *Select New > Microsoft Office Word Document. The document will appear on your desktop.*
    - *Double-click the document to open it*
    - *Type 1-2 lines of text*
    - *Save and close the document*
7. Following the steps we reviewed during the presentation, attach this newly created document to the application package to satisfy all of the form/document requirements.
    - Don't forget to select the appropriate document topic to match each item in the application checklist! (e.g. Select a topic of acceptance letter for the document attached to the acceptance letter field)
8. For one form/document do not add any an attachment but instead select the checkbox to indicate you will be submitting a hard/paper copy of that document.
9. Click save. You will be re-directed to the **Action Plan Summary Page**.

<<end of exercise>>

APPLY FOR FUNDING (PART 3) EXERCISE

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the RTW action plan link in the left navigation menu under case actions. You will be taken to the **Action Plan Summary Page**.
4. In the action plan, select the **Edit Application** button in the row of the appropriate intervention. You will be returned to the application package screen you were working on in the previous exercise.
   - Now that you have completed the case elements and forms/documents, your application checklist should appear similar to this:

Application Checklist

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

Forms / Documents	Status	Paper	Date
Acceptance Letter	Attached	☐	Jan 12, 2012
Labour Market Research	Attached	☐	Jan 12, 2012
Job Search Report	Attached	☐	Jan 12, 2012
Family Size and Financial Statement	Attached	☐	Jan 12, 2012
Resume	Attached	☐	Jan 12, 2012
Program Cost List	Attached	☐	Jan 12, 2012
SD Worksheet	Attached	☐	Jan 12, 2012
Authorization to Quit	Optional	☐	
Child Care Letter	Optional	☐	
Medical Documentation	Sent On	☑	Jan 12, 2012
Previous Marks	Optional	☐	
Letter of Good Financial Standing	Optional	☐	
Letter from Employer	Optional	☐	
Career Transition for Medical Reasons	Optional	☐	

- Notice that when we last saved this screen, LaMPSS changed the status to “Sent On” for the item we indicated would be submitted in hard/paper copy. LaMPSS also assigned a date to reflect when each item was attached.

5. In the case manager’s summary statement section of the **Application Package Page** select a response for each of the following three questions:

- Do you support this Return to Work Action Plan?
- Have both you and the client signed the Case Manager’s statement?
- If spousal information was collected, has the applicant’s spouse signed the consent form?

For this exercise, assume that you do support the RTWAP and all documentation has been signed by both parties.

6. Write a case manager’s statement in the text box provided.

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

7. Click save. You will be re-directed to the **Action Plan Summary Page**.

8. In the action plan, select the 

button in the row of the appropriate intervention. You will be returned to the application package screen.

9. Click submit application at the bottom of the screen. A popup window will ask you to confirm that you wish to submit the application.

10. Click OK to continue. An icon will appear while the application is submitting to show that the PDF of the case manager’s statement is being created and then a message will appear to confirm that the application has been successfully submitted.

11. Write down the agreement ID appearing in the message then click OK.

- At this point you would <u>immediately</u> mail any supporting documents you have indicated would be submitted in hard/paper copy.

<<end of exercise>>

PRACTICE USING NOTIFICATIONS EXERCISE

1. From the **User Homepage** click on notification in the noticiation actions section of the left navigation menu. You will be re-directed to the **Maintain Notifications Page**.
2. At the bottom of the screen, in the notification item section, create a new notification for yourself by entering information in the following fields:
    - Due Date
    - Agrmnt/Case ID
    - Priority
    - Description
3. Click the create notification button. If the notification is created successfully a blue and white checkmark will appear next to the button.
4. To practice how to delete a notification, locate the reminder notification just created in the search results section of the page.
5. Select the checkbox to the left of the notification item you wish to delete.
6. Click delete. A popup window will ask, “Are you sure you wish to mark the selected items as deleted?”
7. Click ok.

<<end of exercise>>

PRACTICE USING TASKS DEMONSTRATION

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
3. Click the case task link in the left navigation menu under case toolss. You will be taken to the **Cast Tasks Page**.
4. Click add. A new row will be added to the case tasks section of the screen.
5. Enter the following information:
    - Priority (P)
    - Task (select any task)
    - Due Date
6. If desired, add case notes or case documents using the icons to the right of the task.
7. Click save.

Please note, *this task can later be completed by selecting an outcome. The completed date will automatically fill with the current date when the outcome is selected.*

<<end of exercise>>

Complete Close Action Plan Task Demonstration

1. In the “My Task Items Due/Overdue” section of your user homepage locate the close action plan task for your case/client.
2. Click on the task name (“Close Action Plan”) to navigate directly to the **Case Task Page**.
    - The close action plan task will be displayed in the case tasks section of the page

-OR-

1. Navigate to the **Case Homepage** by clicking the recent agrmnts/cases section of the left navigation menu.
2. Click on the case ID and name of your client to access the homepage.
    - In the “Case Tasks” section of the homepage locate the close action plan task and click on the task name (“Close Action Plan”) to navigate to the **Case Task Page**.
    - The close action plan task will be displayed in the case tasks section of the page.
3. Select an outcome from the drop-down menu. For this exercise, please indicate that the RTWAP has is complete.
    - Please remember that selecting an outcome of moved out of province, left labour force, referred out or did not follow through will close the case. This action cannot be reversed.
4. Click save. You will be redirected to the **Case Homepage**.
5. Notice that:
    - The case header displays the updated status of Follow Up.
    - A new task (“Record 24 Week Outcome”) was automatically generated by LaMPSS when the action plan was recorded as developed and signed; however, the due date for this task is the last planned intervention end date plus 24 weeks. This task will only appear on the **Case Homepage** and **User Homepage** within 30 days of the due date.

<<end of exercise>>

LAMPSS REFRESHER

Case Management Lifecycle - Intake

CASE MANAGEMENT LIFECYCLE - ASSESSMENT

Case Management Lifecycle – RTWAP Development

CASE MANAGEMENT LIFECYCLE – ENHANCED SERVICES

CASE MANAGEMENT LIFECYCLE – RTWAP MANAGEMENT

Case Management Lifecycle – Follow Up

Intake Form for Training

Person Information

Title: ☐ Mr. ☐ Mrs. ☐ Ms. *Select a title*

Gender: ☐ Male ☐ Female *Select a gender*

Last name: SMITH

First name: <<ENTER YOUR FIRST NAME>>

Middle initial:

Choose another last name if you prefer!

SIN: *Your trainer will provide a SIN*

Birth date: <<CHOOSE A BIRTH DATE>>

Marital status:

☑ Single	☐ Married
☐ Deserted	☐ Common-law
☐ Divorced	☐ Widowed
☐ Separated	☐ Other

Service language: ☑ English ☐ French

Home phone number: 902-555-5555

Mobile phone number: 902-555-5555

Email address: SAMPLE@EMAIL.COM

Mailing Address

Care of:

Street address: 123 MAIN STREET

City: <<CHOOSE A CITY>>

Province: NOVA SCOTIA

Country: CANADA

Postal/Zip code: <<CHOOSE A POSTAL CODE>>

Civic Address (if different than mailing address)

Street address:

City:

Province:

Country:

Postal/Zip code:

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Intake Form for Training

Registration Details

Employment status: ☐ Full-time Employed ☐ Part-time Employed ☐ Variable Hours ☐ Seasonal Employment ☐ Self Employed ☑ Unemployed

Work hours/week:	Hourly wage:	Expected layoff date (if have one):
N/A	N/A	N/A

Are you a student? ☐ Full-time ☐ Part-time ☑ No

Post-secondary? ☐ Yes ☑ No

Have you applied for or in receipt of EI within the last 36 months? ☑ Yes ☐ No

Have you had a medical, parental, or sick leave claim that ended in the last 36 to 60 months? ☐ Yes ☑ No

If yes to the above, what type of claim was it? ☐ Parental ☐ Medical ☐ Sick leave

Are you legally entitled to work in Canada? ☑ Yes ☐ No

Are you currently involved with another agency? ☐ Yes ☑ No

What language do you wish to correspond in? ☑ English ☐ French

What is your preferred correspondence method? ☑ Email ☐ Reg. Post. ☐ Telephone

Referral Information

How did you hear about us?

ADVERTISEMENT IN THE NEWSPAPER

Name of organization who referred you to us (if here by referral)

Contact name:

Contact phone number:

Intake Form for Training

Case Information

Residency status: ☑ Canadian citizen ☐ Permanent resident ☐ Other

Are you currently in receipt of any of the following benefits?

- ☑ Employment Insurance
- ☐ Workers Compensation
- ☐ Quebec Pension Plan
- ☐ Canada Pension Plan - D
- ☐ Private Insurance (LTD, STD)
- ☐ Student Loan
- ☐ Income Assistance
- ☐ Canada Pension Plan
- ☐ Settlement Support - RAP
- ☐ Quebec Pension Plan - D
- ☐ Layoff Package
- ☐ Other

Do you have access to transportation? ☑ Yes ☐ No

What type(s) of driver's license do you have?

- ☐ No License
- ☐ Motorcycle – Class 6
- ☐ Small Bus/Taxi/Ambulance – Class 4
- ☐ Large Buss – Class 2
- ☐ Beginners – Class 7
- ☑ Regular Vehicle – Class 5
- ☐ Heavy Vehicle – Class 3
- ☐ Tractor Trailer or Truck Trailer – Class 1

Are you willing to relocate to find work? ☑ Yes ☐ No

If yes, where:

WITHIN NOVA SCOTIA

Do you consider yourself to be a member of any designated groups?

- ☐ Aboriginal - Status
- ☐ Aboriginal - Metis
- ☐ Physical Disability
- ☐ African Nova Scotian
- ☐ Immigrant
- ☐ Aboriginal – Non-Status
- ☐ Aboriginal - Inuit
- ☐ Mental Disability
- ☐ Visible Minority
- ☐ Francophone/Acadian

Select 1-2 designated groups

If you checked any of the above, provide any additional details:

Is there anything that may impact your ability to either attend or participate in meetings or group services/workshops? ☑ Yes ☐ No

If yes, please explain:

CHILDCARE

Please list any community partners you are currently or have recently worked with?

N/A

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LaMPSS- Report #216 Design

Page 3 of 7

Form generated: 2011-01-13 2:36

Intake Form for Training

Education History

Do you have a Grade 12 diploma or GED? ☑ Yes ☐ No Year attained: <<YEAR>>

Highest level of education you have completed: HIGH SCHOOL

In Canada: ☐ Yes ☐ No

Year attained: <<YEAR>>

Source/Location (e.g. School): <<ENTER THE NAME OF A LOCAL HIGH SCHOOL>>

Province or Country: NOVA SCOTIA

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.

Education/Training/License: BACHELOR OF SCIENCE

Source/Location (e.g. School): MSVU

Start date: SEPTEMBER 2002

End date:

☐ Completed ☑ Incomplete ☐ In progress

Education/Training/License:

Source/Location (e.g. School):

Start date:

End date:

☐ Completed ☐ Incomplete ☐ In progress

Education/Training/License:

Source/Location (e.g. School):

Start date:

End date:

☐ Completed ☐ Incomplete ☐ In progress

Education/Training/License:

Source/Location (e.g. School):

Start date:

End date:

☐ Completed ☐ Incomplete ☐ In progress

Education/Training/License:

Source/Location (e.g. School):

Start date:

End date:

☐ Completed ☐ Incomplete ☐ In progress

Enter additional Education History if desired

Intake Form
Opportunity Zone

Employment History

Please provide your last three employers including your current employer if you are currently working.

Use different employment history if desired

Employer name	Job title	Start date	End date	Reason for leaving
WALMART	MERCHANDISER	09/10/2011	03/01/2012	LAID OFF AFTER CHRISTMAS SEASON
LAWTON'S DRUG STORE	CASHIER	06/01/2010	29/08/2012	TERM POSITION (COVERING MATERNITY LEAVE)
NOVA SCOTIA PULP AND PAPER MILL	BACKTENDER	06/01/1999	25/09/2009	LAID OFF

Other Skills

Please provide any additional marketable skills you feel you possess that may not be covered under your educational or employment history. (eg. CPR, WHMIS, volunteer work, or computer skills, etc.)

Up-to-date CPR and WHMIS (taken in 2011)

Enter as many additional skills as desired

Intake Form
Opportunity Zone

Collection, Use, and Disclosure of Personal Information Consent

COLLECTION: Personal information provided with your intake form/application for funding is collected under the authority of the *Nova Scotia Freedom of Information & Protection of Privacy Act* and the *Employment Insurance Act of Canada* and will be used only for the administration of the service for which you are applying.

USE: The personal information collected will only be used and disclosed in keeping with the access and privacy provisions of the *Nova Scotia Freedom of Information and Protection of Privacy Act* and the *Nova Scotia Personal Information International Disclosure Protection Act*. Such uses may include: determining services appropriate to the needs of the client, determining eligibility for programs and funding, ensuring compliance with funding agreement terms, case management, tracking progress during an agreement funded by Employment Nova Scotia and to provide statistical information to agencies providing funding support to the services offered.

DISCLOSURE: The personal information provided may be shared with a Service Provider Organization, Employment Nova Scotia and/or a Training Institution that is administering a program or service. This information may include: contact information, return to work action plan, eligibility for employment benefits, marks, attendance, and proof of financial payments to the training institution. The personal information provided may also be shared with the Government of Canada and the Canada Revenue Agency in keeping with the data-sharing provisions of the Labour Market Development Agreement.

ACCESS: Under the privacy provisions of the *Nova Scotia Freedom of Information and Protection of Privacy Act* individuals have the right to protection of, and access to, their personal information. To obtain access to, or correction of personal information used and collected, individuals must submit a written request to the Nova Scotia Department of Labour and Advanced Education. Requests should be directed to the Employment Nova Scotia Agreement Manager.

I acknowledge that I have read and understand the above information regarding the collection, use, and disclosure of my personal information:

<<Client Name>>	XXX-XXX-XXX
Client name (print)	Social Insurance Number
<<Client Signature>>	DD-MM-YYYY
Client signature	Date
<<Witness Signature>>	DD-MM-YYYY
Witness signature	Date

PLEASE RETURN THIS FORM TO YOUR CASE MANAGER