NOVA SCOTIA CANADA

LaMPSS

LaMPSS Fundamentals

February 2011

Welcome to LaMPSS Fundamentals for Release 2.0. This is the second in a series of training events being offered for external service providers to help prepare for the upcoming implementation of LaMPSS Release 2.0. This session will introduce you to key features and functionality of the LaMPSS application.

Objectives

➢ Introduce service provider staff to the LaMPSS solution

➢ Review key features of the LaMPSS solution and tools available to LaMPSS users

The objectives for today's session are shown here. This session will give you a basic orientation on how the LaMPSS application works. As mentioned, we will review some key features of how LaMPSS has been designed to meet your needs and some of the many tools it provides to help you manage your workload.

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As you know, 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. The EAS case management webinar introduced you to LaMPSS and the high level business processes involved in LaMPSS case management. This session will focus less on the actual case management business process and more on how LaMPSS is designed and how you will use it.

The basics introduced here, in fundamentals, ensure all training participants have the same foundation before moving into the detailed, role-specific sections of the training curriculum. We will look at… *<review slide>*.

Terminology and Concepts
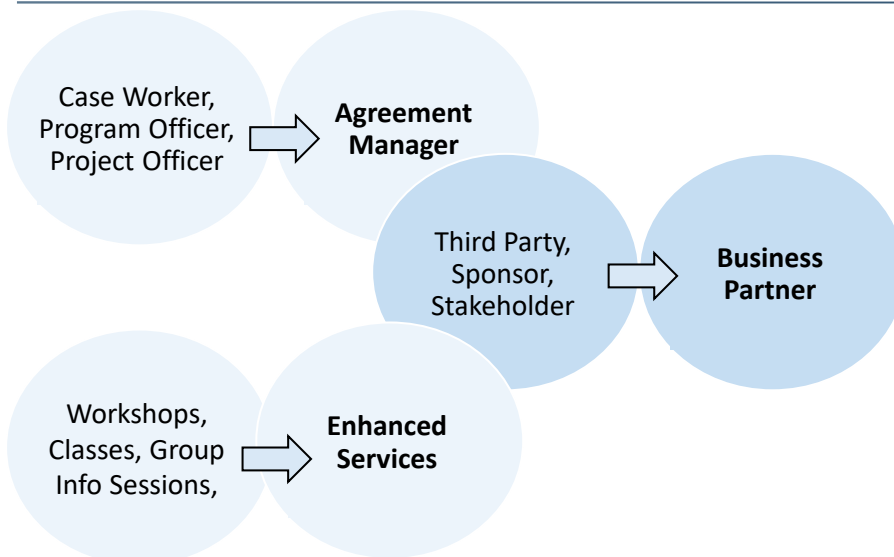
Let's start with terminology and concepts. As a LaMPSS user, you will want to understand certain key terms and concepts in order to communicate efficiently with other LaMPSS users. For example, in the case management lifecycle you learned that in LaMPSS the term case management means the entire process of working with a client from intake to assessment, through RTWAP development and management, then into follow up.

Although not all the terms used to describe your work will change, there is a common language used in LaMPSS that you will want to become familiar with. This common language will facilitate the ability of LaMPSS users to talk to each other. Let's look at some examples.

Today, you may use words like case worker, program officer, or project officer to mean the person at ENS who works on client funding agreements. *<click to reveal>* In LaMPSS, this person is called the agreement manager. Similarly, you may describe community organizations you work with or refer clients to as third parties, sponsors or stakeholders. *<click to reveal>* In LaMPSS, all of these types of organizations are called business partners. A third example are the activities that you currently use words like workshop, class, or group information session to describe. *<click to reveal>* In LaMPSS these all fall into the category of enhanced services. Throughout case management training you will have the opportunity to become familiar with the new terminology.

Also, a lot of the terminology in LaMPSS is part of the common LaMPSS service framework which we will take a closer look at in a few moments.

Terminology and Concepts

Before we move on from terminology, however, let's look at 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>* There is a glossary link right at the top of the help menu that you can click to access a full glossary of LaMPSS terminology. *<click to reveal>*

<click to reveal> The glossary, shown here, defines and describes the common terminology used throughout LaMPSS!
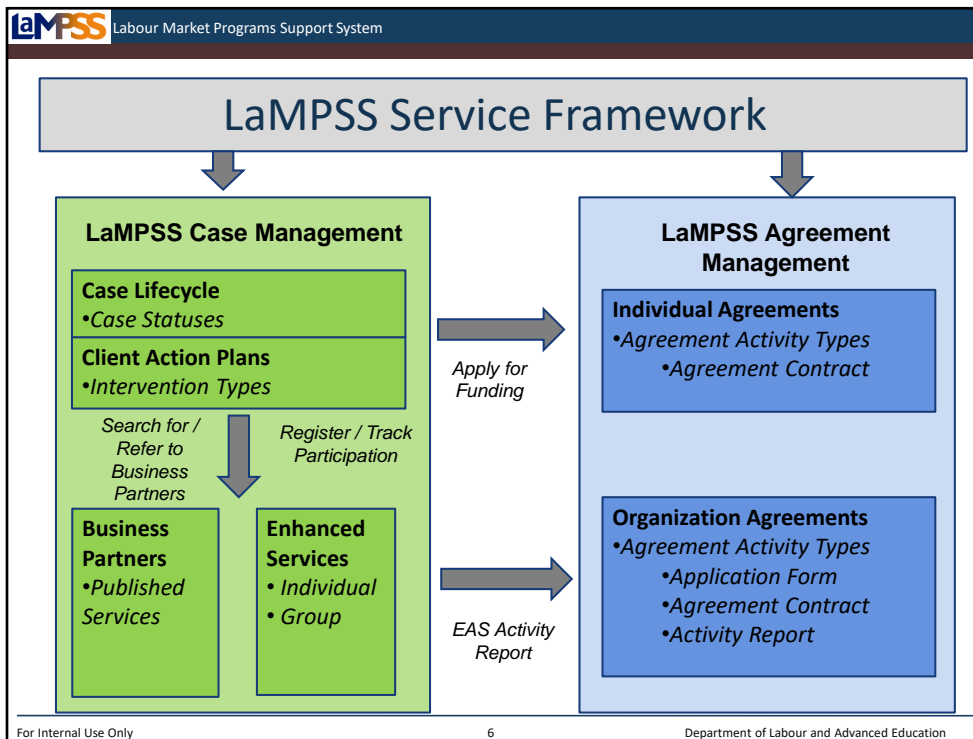
As we mentioned, a lot of the common terminology in LaMPSS draws from the LaMPSS service framework. The LaMPSS service framework is a master list of standard names and definitions for labour-market-related services. The names and definitions were developed in consultation with program staff and service providers from over 40 different funding programs. This common framework is not something you will *see* in LaMPSS, but it influenced how LaMPSS was designed and it will enable effective data collection, program planning and evaluation.

Under this master list, there are subsets of the service framework. Both case management and agreement management in LaMPSS draw from the framework. In case management, the intervention types available as a part of the RTWAP are drawn from the service framework master list. Similarly, the services provided by business partners and the service types in the enhanced services module are drawn from subsets of the service framework.

In terms of agreement management, the agreement activity types are a subset of the service framework as well. These activity types are used in several areas including on the application form, the agreement contract and in activity reports.

LaMPSS Service Framework

➢ **Why use a common framework?**

❑ Consistency between different programs that offer similar/related services

❑ Alignment between case management and agreement management

❑ Facilitate referrals between organizations

❑ Improved data for accountability report, program planning and evaluation
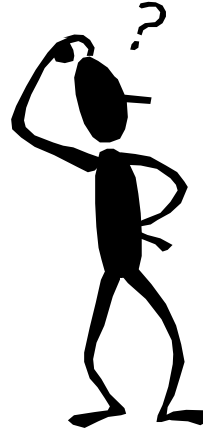
The service, activity and intervention types that form the LaMPSS service framework are important concepts for all LaMPSS case management users to understand. The service framework has allowed us to categorize the things your organizations do in a such a manner that creates consistency while still enabling some flexibility, for example, in how activities are delivered. *<click to reveal>* There is now a higher level of consistency between different programs that provide similar or related services.

In addition, the framework aligns the services between case management and agreement management. *<click to reveal>* For example, the names of intervention types in a client's RTWAP are the same as the names of the activity types in the client's funding agreement with ENS. These are also the same as the activity types in your organization's EAS funding agreement. *<click to reveal>* These consistencies will facilitate referrals between organizations.

Another major benefit of the framework is it ensures all the service, activity and intervention types roll-up to higher level themes for management and accountability reporting. *<click to reveal>* The quality of the case management data collected will be much higher and will allow for more effective EAS program planning and evaluation.

Organization Preferences

We've mentioned how LaMPSS will promote consistency, through things like the service framework, while still maintaining some flexibility for organizations. The ability to configure organization preferences is an example of this. Organizations will designate staff and give them the appropriate security in LaMPSS to maintain users, contact information, enhanced service offerings and business partners. Additionally, one of the most requested features for case management was the ability to configure the information that can be captured and reported about a client.

The organization preferences page pictured here has allowed each of your organizations to select from a list of pre-established information elements to determine the information they would like to capture. *<click to reveal>* The four modules that are available are life situation, health and disability details, legal status, and immigration. Organizations not only select which pieces of information will be collected, but the approach that will be used to collect it. These selections influence the behaviour of the LaMPSS forms, LaMPSS case management screens and reports. This is a significant change from Contact IV which offered little or no flexibility to meet each organization's unique needs. These settings for your organization will be in place before implementation.

Let's move further into the LaMPSS application itself which you will access through the sign in page seen here. To access LaMPSS you will visit this webpage and enter your credentials into the spaces provided. *<click to reveal>* Your organization has a LaMPSS ID that you will enter here along with your own user ID and password. Please note, it is important you do not share your login information with anyone. Your login information and user ID is what LaMPSS uses to direct you to your personal user homepage with notifications and tasks assigned specifically to you. Any actions you complete in the system are also tagged with your user ID.

<click to reveal> Below the sign in section is a text box containing the terms of use for LaMPSS which we recommend you review the first time you access LaMPSS. Each time you login to LaMPSS you will need to ensure the checkbox showing that you agree to the terms of use is selected. Once this is complete you simply click login! *<click to reveal>*

You can also see here that LaMPSS includes a password reset option on the main login page. *<click to reveal>* If you forget your password at any point simply click the button reading "Forgot your Password?" to receive further instructions.

In addition to using this page to sign into LaMPSS initially, you will use this page to

sign back into LaMPSS when your session times out. As a security feature LaMPSS includes a security time-out after a certain period of inactivity.

User Security

➤ Different case management roles have different security profiles in LaMPSS.

➤ For example…

If your profile is…	You are able to…
Case Intake & Follow Up	• Add persons and cases • Work on cases in Intake status • Add notes and documents to cases • Add outcomes during Follow Up status
Case Manager	• Add persons and cases • Manage cases through the entire lifecycle • Register participants for Enhanced Services
Management View	• Run management reports
Enhanced Services	• Generate Enhanced Services reports • Schedule Enhanced Services

Once you've signed into LaMPSS, you will be taken to your user homepage and start working. You will be working under a set of security privileges specifically assigned to you. There are various roles you could have in LaMPSS case management. Each of the different roles in LaMPSS is associated with a different set of security privileges. Security is what enables access to specific screens, data and the ability perform certain functions in LaMPSS.

For example, case intake and follow up users are able to add person records and create cases, however, they can only work on cases in intake status or add employment outcomes during follow up. During the rest of the case management lifecycle they will simply be able to add case notes or documents. Case managers, however, are able to perform all the same functions as the case intake and follow up user, but can work on cases throughout the entire lifecycle. You would generally think of the case manager as the case manager.

There are other roles in LaMPSS as well, such as the management view which allows the user with that security profile to run certain management reports and the enhanced services profile which allows the user to generate enhanced services reports and schedule new enhanced services sessions for your organization.

Altogether there are 8 possible security profiles for case management users. Each profile provides various levels of access to functions in LaMPSS. Your roles have been determined by your LaMPSS Administrator!

Case Management Lifecycle

➢ **Case Status**
- ❑ Intake
- ❑ Assessment
- ❑ RTWAP Dev
- ❑ RTWAP Mgmt
- ❑ Follow Up
- ❑ Closed

Apply for Funding

Intake → Assessment → RTWAP Development → RTWAP Management → Follow Up
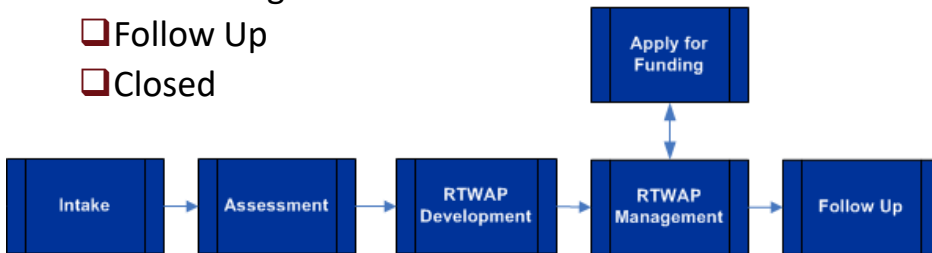
You've already been introduced to the case management lifecycle, so we will only touch on it briefly here. As a case progresses, it will move through various case statuses. Status is simply the word we will use in LaMPSS to reflect the current stage a case is at.

There are six possible statuses for a case. They are intake, assessment, RTWAP development, RTWAP management, follow up and closed. You will notice that most of these statuses correspond to your case management lifecycle diagram. One difference is that the RTWAP management status includes the process of applying for funding. The other difference is the additional status of closed, which is the status a case moves into anytime it exits the case management lifecycle.

The individual funding agreements you work with will also have statuses, although in these cases it will be called agreement status instead of case status. Understanding what a status means in LaMPSS will help you as you monitor the progress of the funding applications you submit to ENS.

Person and Organization Registries

Employers
Sector Councils
Other 3rd Parties

Adult High Schools
University Ste-Anne

NSCC

CBOs

➤ LaMPSS users share this registry.

➤ Each organization and person registers once with LaMPSS.

Although case management is the area of LaMPSS where you will spend much of your time, there are other parts of the LaMPSS solution you will need to use. Let's talk about how other parts of the solution link into case management.

<click to reveal> An organization or service provider is the term used in LaMPSS world to mean a business government deals with for delivery of labour market programs. LaMPSS uses a common registry of organizations. This means that organizations are each registered once and all LaMPSS users share the common registry. Organization 123 is the same for all LaMPSS users.

<click to reveal> Similarly, a LaMPSS person is a client who is accessing services under the labour market programs delivered by government. Just like organizations, a person is registered once in LaMPSS.

<click to reveal> There is a centralized group called LaMPSS Operations Support who completes the initial registration of an organization and can support the addition of a person if, for example, a person ends up with two records and those records need to be merged together. In most cases, however, case management staff will be able to add person records in LaMPSS.

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<click to reveal> Once organizations and persons are added, all LaMPSS users share those registries.

LaMPSS functionality includes the ability to create and maintain private clients using a virtual private database (VPD); however, all EAS clients will be shared with government as they are accessing government funded services and need to be captured for accountability!

Organization vs. Person vs. Case

Organization
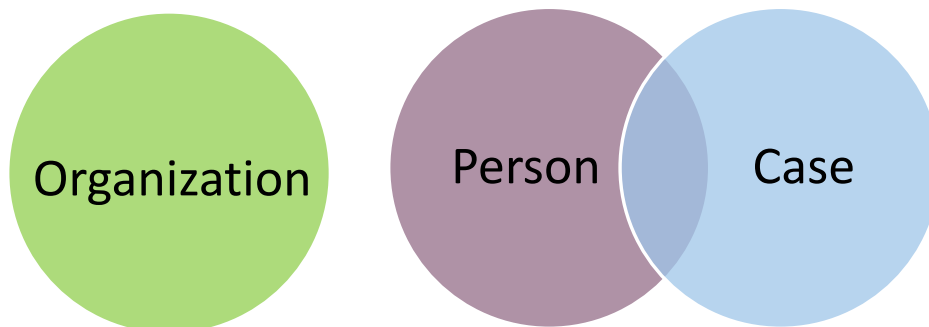
Person

Case

As you learned in the case management lifecycle webinar, it will be important to know that a person and a case are two distinct concepts in LaMPSS with some shared information such as contact information. As a LaMPSS case management user, you will work with persons, cases and organizations!

You work for a LaMPSS organization and as a LaMPSS case management user you may refer clients to other organizations who also provide EAS services, or to business partners. When a person works with you, the person will be registered in LaMPSS. That person record can then be connected with a case. A case defines the engagement with the 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.

While a person will only have one active case at a time, LaMPSS will retain information on past cases related to each person.

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Home Pages

> Everyone with access to LaMPSS has a User Homepage. Think of it as a 'launching pad' into your daily activities.

> When you access LaMPSS you will be automatically taken to your User Homepage.

> There are different types of homepages, each of which contains different information:
> - ❑ User Homepage
> - ❑ Organization Homepage
> - ❑ Person Homepage
> - ❑ Case Homepage

Whether you are working with an organization, person or case you will always start from the user homepage which we've learned is the first screen you see when you log in. Everyone with access to LaMPSS will have a user homepage. Homepages provide a view of all the tasks and notifications in a user's workload.

Homepages are an important communication tool. Tasks can be assigned or automatically generated based on actions taken in LaMPSS. Users should check their homepage often throughout the day to ensure they are addressing the required tasks.

Homepages will provide a summary of tasks and notifications and access to various menu options to manage any organization funding agreements with government and perform case management functions. There are various types of homepages, each of which contains different information. There are user homepages, organization homepages, person homepages and case homepages.

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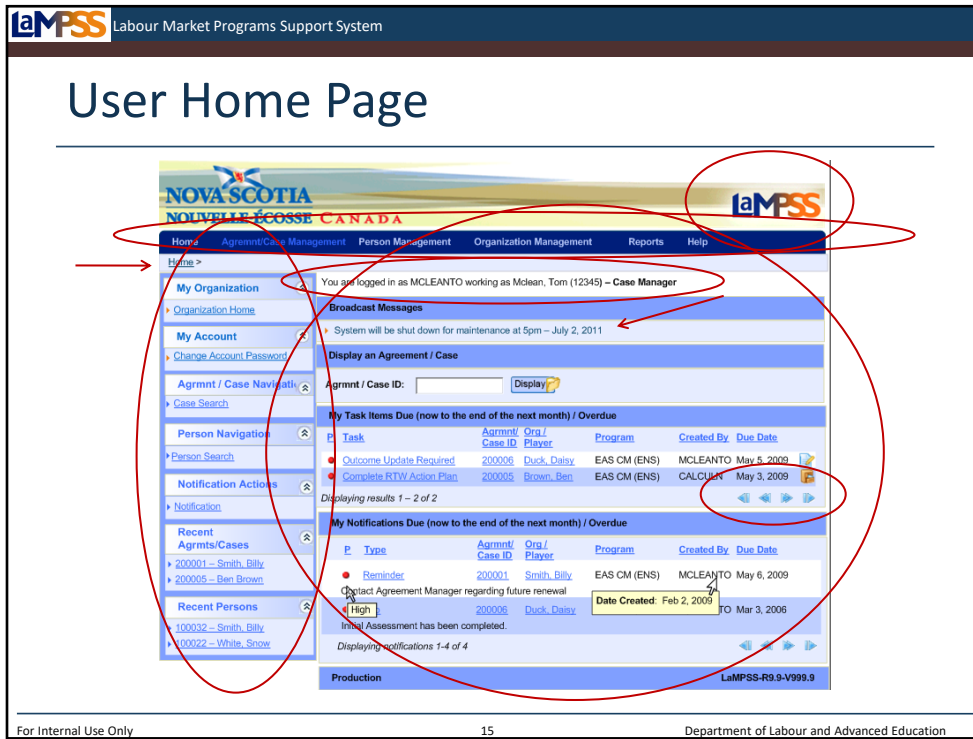
User Home Page

Let's start by reviewing the user homepage. An example of a typical case management user homepage is seen here. Your home page is where you will see any tasks that are specifically assigned to you as they become due and overdue. Your user homepage also has quick links to cases and persons you have accessed recently.

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.

Organization Home Page

<click to reveal> Each organization also has a homepage that provides external users with access to organization-specific information such as organization funding agreements, enhanced services and business partners. *<click x 2 to reveal>* The ability to access certain organization screens will depend on what your LaMPSS role is!

Person Home Page

<click to reveal> Finally, 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.

By reviewing the homepages, you are starting to see that the application has many icons and you will become familiar with the icons that appear most frequently in your work. Remember that if you hover over an icon a tool tip will usually appear to tell you what that icon is.

This slide is simply a view of some of the most frequently used icons you will see in the application. For example, the first icon you see allows you to add a case note, while the one next to it allows you to add a new note or edit existing notes. Similarly, there are icons to add document attachments or to view/replace existing documents.

Navigation & Icons

As we were reviewing the homepages you may have noticed that the left navigation menu is dynamic and it changes depending on what part of the LaMPSS application you are working in. Also note that the left navigation menu can be expanded by clicking on the arrows seen here, *<click to reveal>* and then collapsed by clicking again. *<click to reveal>*

The application is designed to expand and collapse these side navigation menus to provide quick access to frequently used functionality. The application also predicts where you may want to navigate to next from each screen and will show the expanded view of certain menus when it is predicted you may need to use them.

Notifications

Notifications:

> Notifications are user-related communications that can appear on all types of user home pages.
> Notifications can be automatically created by LaMPSS or manually created by a LaMPSS user.
> Notifications may or may not be related to an agreement or case .
> Once a notification has been addressed (i.e. you remove it from your home page) the information is not stored for future reference.

The final part of this session is a review of the most frequently used case tools. Let's start by looking at notifications. Notifications are user-related communications that can appear on all types of user homepages as well as the case homepage. Some notifications will be automatically generated by the system and assigned to you. Alternately, users can create notifications manually.

Notifications are associated with users. While they may also be linked to a specific case or agreement, the primary connection is with the user ID they are initially assigned to. We will see in a moment that this is different from tasks.

Another way notifications differ from tasks is that once a notification has been addressed or you have deleted it, the information from that notification is not stored in LaMPSS for future reference.

Tasks

Tasks:

> ➢ Tasks are case related activities that must be completed within a given timeframe.
> ➢ Only Case Managers who have cases assigned to them will have tasks on their home pages.
> ➢ Tasks can be automatically created by LaMPSS or manually created by a LaMPSS user.
> ➢ As tasks are completed LaMPSS saves and stores all information associated with that task within the case for future reference.
> ➢ Tasks are case specific and therefore associated with a specific case ID in LaMPSS.

Now let's move on to take a look at tasks. Tasks are agreement and case related activities that must be completed within a given timeframe. Only Case Managers who have cases assigned to them in LaMPSS will have tasks on their homepages. On the user home page in LaMPSS there is a section, as we saw earlier, that outlines task items due within the next month or tasks that are already overdue. This is not a full listing of all tasks, only those due within a specified timeframe. The due date of each task appears in the far right hand column. Tasks also have a low, medium or high priority indicator which will appear as a green, yellow or red dot.

Because tasks are associated with a case, if responsibility for a case is transferred to a new user all tasks related to that agreement are also transferred and will then appear on that user's homepage.

Like notifications, tasks can be automatically created by LaMPSS or manually created by a LaMPSS user. A list of manually created tasks will be pre-defined and available for you to choose from. An example of an automatically created task is the Complete Intake task created when a new case is created in LaMPSS. Tasks can be used to record events that have already occurred or things should take place in the future. The case manager can record case notes and attach appropriate documents to a task, making them an important tool that can be used to organize and document all of the events that occur during case management.

As tasks are completed, LaMPSS will save and store all information associated with the task

for future reference. This information can be searched easily from the case task screen. You'll remember that this is very different from notifications where no information on past notifications is maintained once they have been completed.

Documents

➤ LaMPSS provides the ability to attach documents to a case.
➤ Users are prompted to define key attributes that identify the document attachment.
➤ Attachments are automatically converted to a PDF format when they are attached – the native format is also maintained.
➤ Attachments can be added at different stages of the case management lifecycle.

LaMPSS provides the ability to attach documents to an agreement throughout the case management lifecycle. Documents may need to be attached to a case beginning with the case intake through to follow up status. This might include a job search record completed by the client or a copy of the client's resume. Document attachments could contain any type of supporting information for a case.

As we saw earlier, there are two icons associated with document attachments. One indicates that an attachment can be added and the second indicates that there are attachments associated with a certain part of the case already.

When an attachment is uploaded, it is automatically converted by LaMPSS into a PDFA (PDF Adobe) format; however, the native format is also maintained in the system and either version of the document attachment can be viewed. When a user adds a document, they are prompted to define key attributes that help to identify the document attached. Both a document name and a topic will be required.

Notes

➢ Notes are annotations LaMPSS users can create and save throughout the system.

➢ When you create a Note in LaMPSS, the system records your User ID and the date and time of the Note. These attributes along with other information categorize the note when they are created/edited so they are easy to find!

➢ Notes can be created/viewed from a variety of places in LaMPSS.

➢ Notes can be created/edited/viewed at any stage of the case management ifecycle.

Notes are an important tool for capturing the thinking that has gone on at different points in the case lifecycle. As a best practice notes should be used to capture anything that required discussion.

Having the user ID, date and time stored with the note means that there is no requirement to sign notes – the user ID identifies who created the note. The system also tags a note where it was created making notes easier to find.

Notes are included on some reports and are only viewable to LaMPSS internal users. Notes should be professionally written and comment only on observable behavior or evidence presented that is relevant to the case or agreement. Information in notes may be made available to the client and/or organization through a Freedom of Information request, and forms part of a legal document, so care must always be taken to ensure that notes are of the highest standard within LaMPSS.

The application also automatically locks notes after 30 days. After this 30 days notes are locked for editing but remain part of the electronic history/audit trail of the agreement. Remember, new notes can always be added to a case!