# LaMPSS Business Support Unit

# NSSAL Learner Management

## Training Guide

Prepared by: LaMPSS BSU
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Version: 1.0

# Table of Contents

# 1 SUPPORT

Depending on the type of support required there are two main sources of assistance:

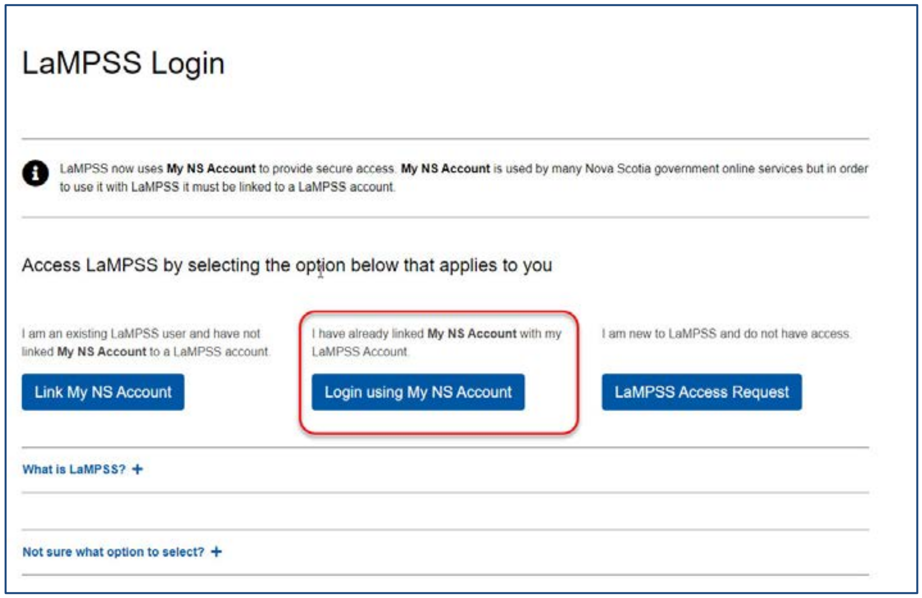
<table>
<tr><th>Adult Education Coordinator</th><th>LaMPSS Operations Support</th></tr>
<tr><td>Your Adult Education Coordinator is your first line of support for “how to” type questions or to request additional information about how to apply the common processes within your organization.<br><br>This would include items such as:<br><ul><li>How to use LaMPSS-LM to gather and manage Adult Learner information</li><li>Information about the assessment processes, tools, and training on the endorsed assessment tools</li><li>Help to arrange training and other supports for new staff</li></ul></td><td>LaMPSS Operations Support is available when you have a LaMPSS-specific question or issue (e.g., logging into LaMPSS or setting up access for new staff).<br><br>You can visit the LaMPSS website (https://novascotia.ca/lae/lampss/lampss.asp) for detailed instructions on LaMPSS processes including several step-by-step guides.<br><br>LaMPSS Operations Support is available via email at LaMPSS@novascotia.ca.</td></tr>
</table>

# 2 LAMPSS BASICS

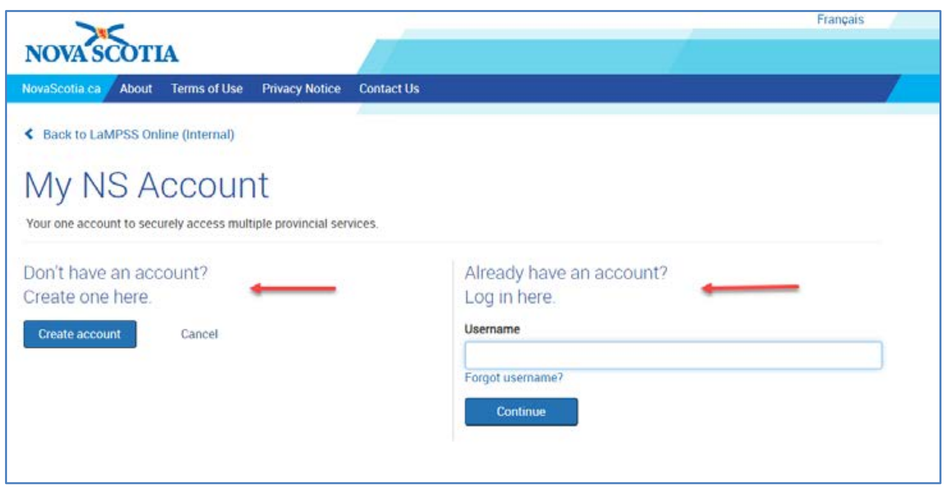
## 2.1 How to Login

The address for the LaMPSS login page is: https://lampss.novascotia.ca/. A My NS Account is required to access LaMPSS.

The link will navigate you to the LaMPSS Login landing page. This landing page is **temporary**. Ultimately, within the next fiscal year, the link will navigate you directly to LaMPSS via My NS Account.



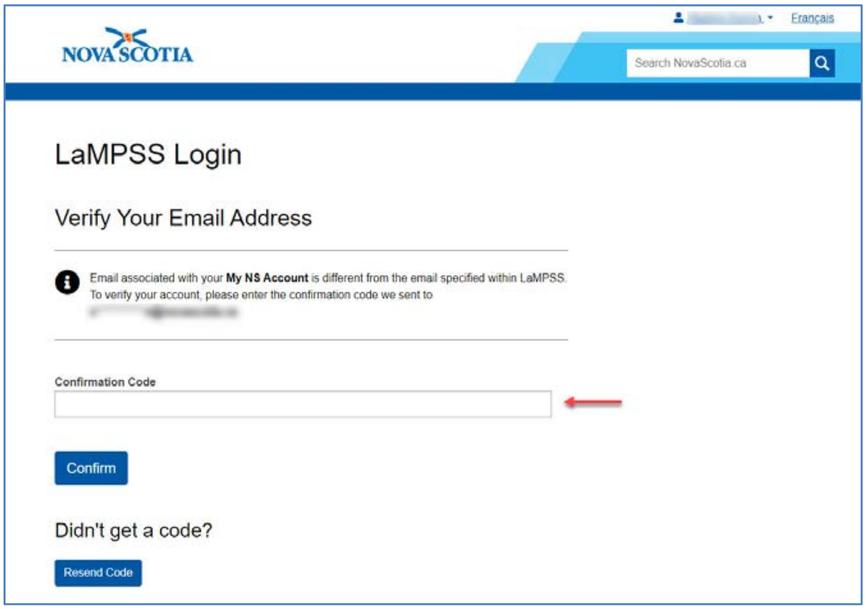

My NS Account is where you can log in or create an account. If you currently do not have a My NS Account, click on **Create account** to begin the process of creating a new account. If you currently have a My NS Account, enter your username and click **Continue**.



If you currently have a My NS Account and do not want to link it to your LaMPSS account, it is possible to create a new account, but it is not recommended if you want to access multiple government services with a single My NS Account.

Once you either create or log in, you will review a privacy notice.

If you are using/creating an account with a different email address than what is used in LaMPSS, you are required to verify your email address. A confirmation code will be sent to the email address that is entered in LaMPSS.

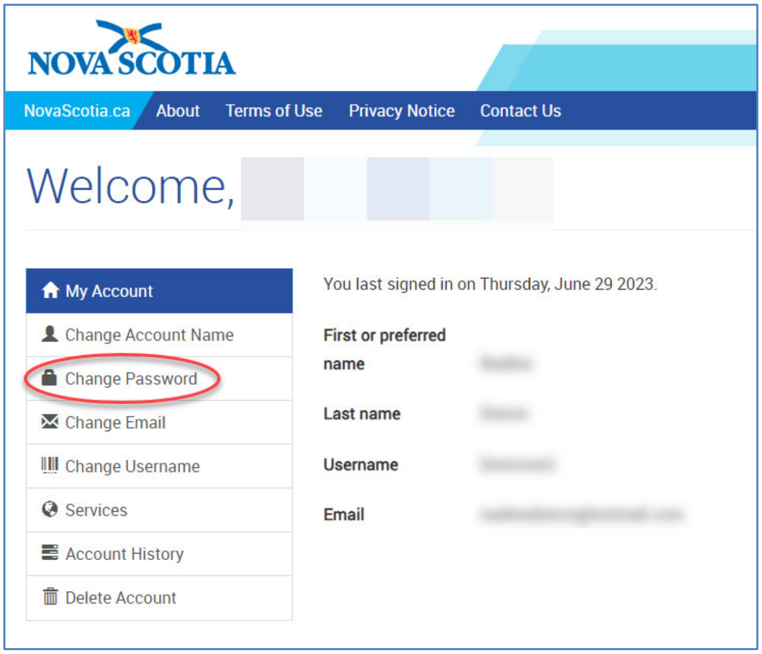


Once linked, you will use your My NS Account credentials to log into LaMPSS.

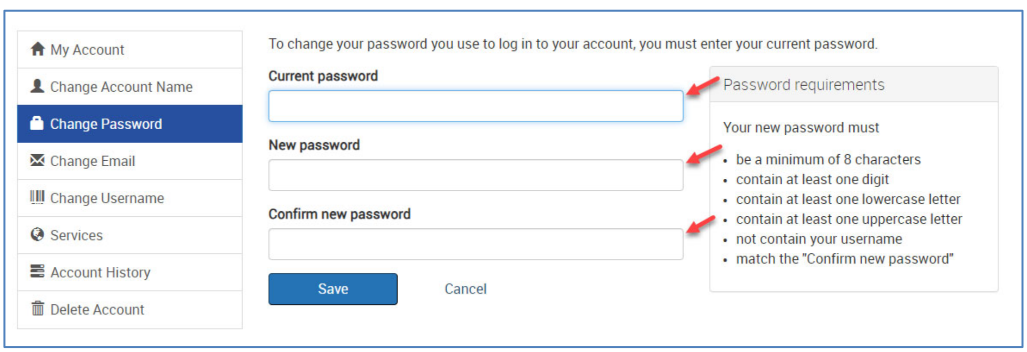
**Change your MY NS Account Password**

1. Log into My NS Account - https://mynsid.novascotia.ca/.

2. Select "Change Password" on the left navigation.




3. Enter your current password, new password and confirm new password and select "SAVE".

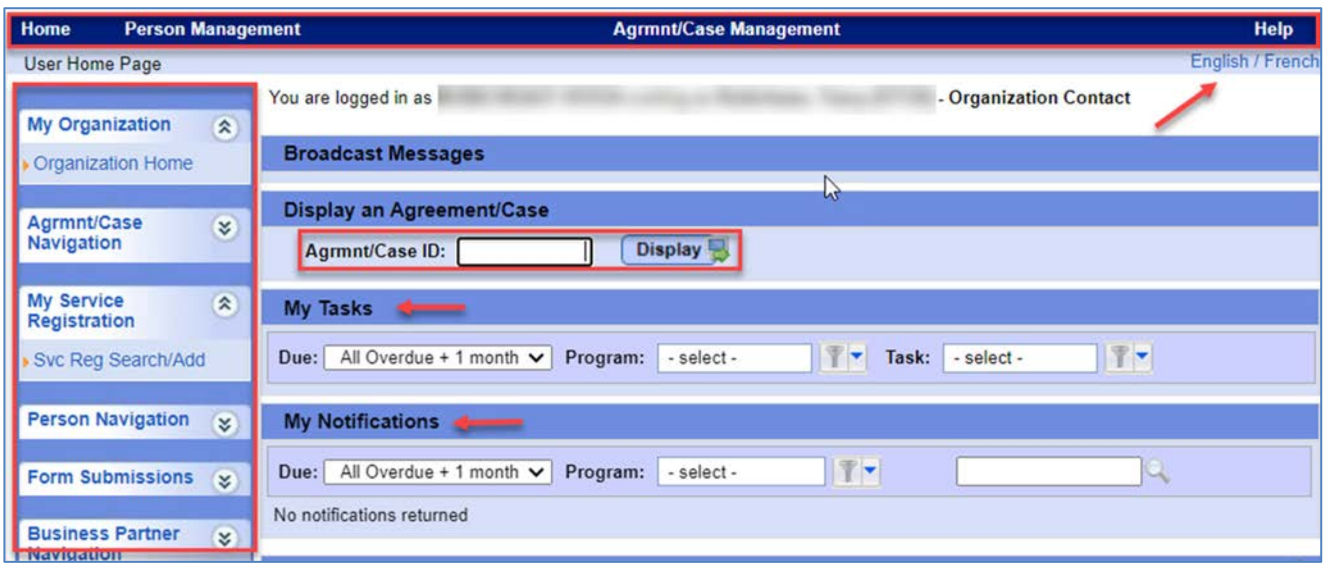



4. You will receive a message that your password was successfully updated.

## 2.2 User Homepage Overview

The key sections of the User Homepage include these items, highlighted in the screenshot below:

- **Top menu bar -** Access the Person Search, Argmnt/Case Search, as well as the Help guides.
- **Left navigation menu –** Access various parts of the system like your Organization Homepage, Service Registration, and lists of your recently accessed persons and cases.
- **Broadcast Messages –** This section will display any important LaMPSS information such as system outages or updates.
- **Display an Agreement/Case –** Quick access to a case by typing in the 6-digit case ID
- **My Tasks –** Your list of upcoming Case Tasks due for Adult Learner's with cases assigned to you.
- **My Notifications –** Your list of upcoming Notifications due. These may be associated with Adult Learners and cases or may be general reminders you have setup in the system.
- **Language toggle –** Where you can change your language preference for LaMPSS between English and French



# 3 ORGANIZATION MANAGEMENT

You can access information on how to manage your organization's information in LaMPSS by accessing the Help guides in the top menu bar within the system. There are also resources available on the LaMPSS website: https://novascotia.ca/lae/lampss/lampss.asp

Some key information specific to Learner Management is provided in this section.

## 3.1 Learner Management Security Roles

Access to Learner Management in LaMPSS is controlled through security roles. Only those staff in your organization with a Learner Management security role will be able to view and create or update a case.

Similarly, only those staff with security roles for Service Registration can create services, register participants, and generate Service Registration report. Only those staff with organization agreement security roles can view your funding agreements with government, apply for funding, and submit financial or activity reports.

This table shows the roles available for each area of the system:

| Learner Management | Service Registration | Organization Agreements |
|---|---|---|
| • Administrator<br>• Manager (LM Manager)<br>• View Only (LM View Only) | • Administrator<br>• User<br>• View Only | • Administrator<br>• User<br>• View Only |

Now, a review of what each of these roles has access to in LaMPSS:

### Learner Management

- Administrator can add or update your organization's contacts and assign other users the Learner Management Update or View security roles
- Manager will have update access for all Learner Management cases for your organization, including the ability to add and update person information
- View users receive view-only access to all Learner Management and person information for your organization

### Service Registration

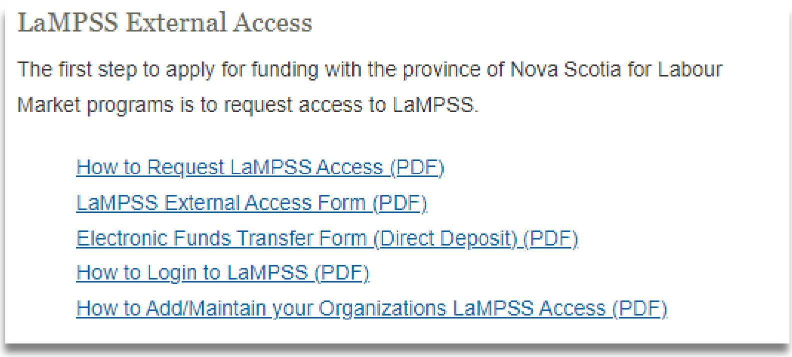
- Administrator can add or update your organization's contacts and assign other users the Service Registration Update or View security roles.
- Users will have update access for all Service Registration information for your organization such as adding or updating services, adding or updating participants, and service reports.
- View users receive view-only access to all Service Registration information for your organization

### Organization Agreement

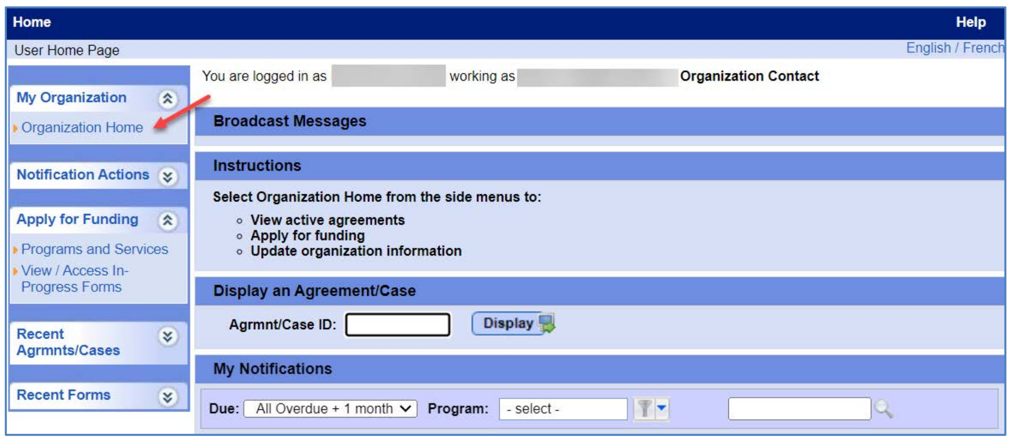
- Full Update users can update your organization and agreement information, add or modify self-serve users, submit funding applications and activity or financial reports.
- Partial Update users can view your organization and agreement information as well as submit funding applications and activity or financial reports.
- View users can view your organization and agreement information but have no update privileges.

## 3.2 Organization Contact Setup

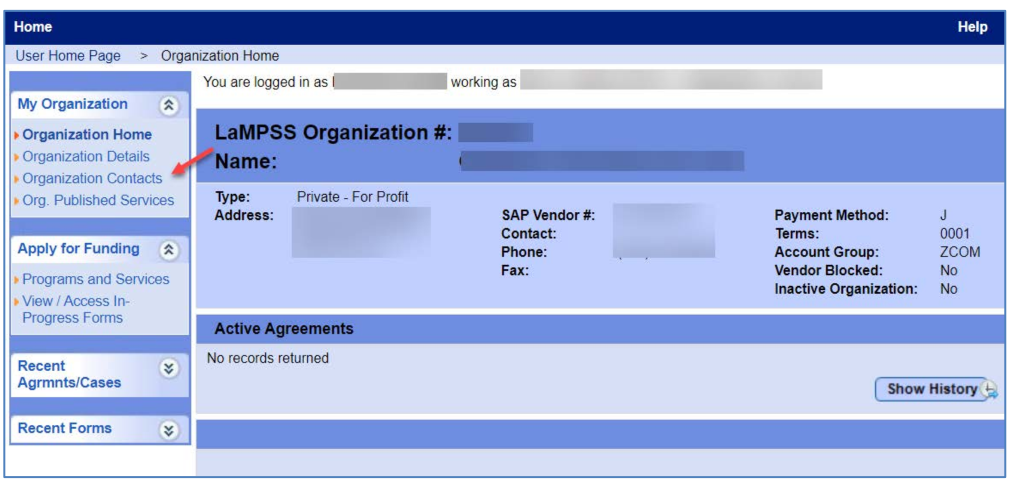
You can access information on how to manage your organization's contacts in LaMPSS by accessing the Help guides in the top menu bar within the system. There are also resources available on the LaMPSS website (https://novascotia.ca/lae/lampss/lampss.asp) in the section pictured below.



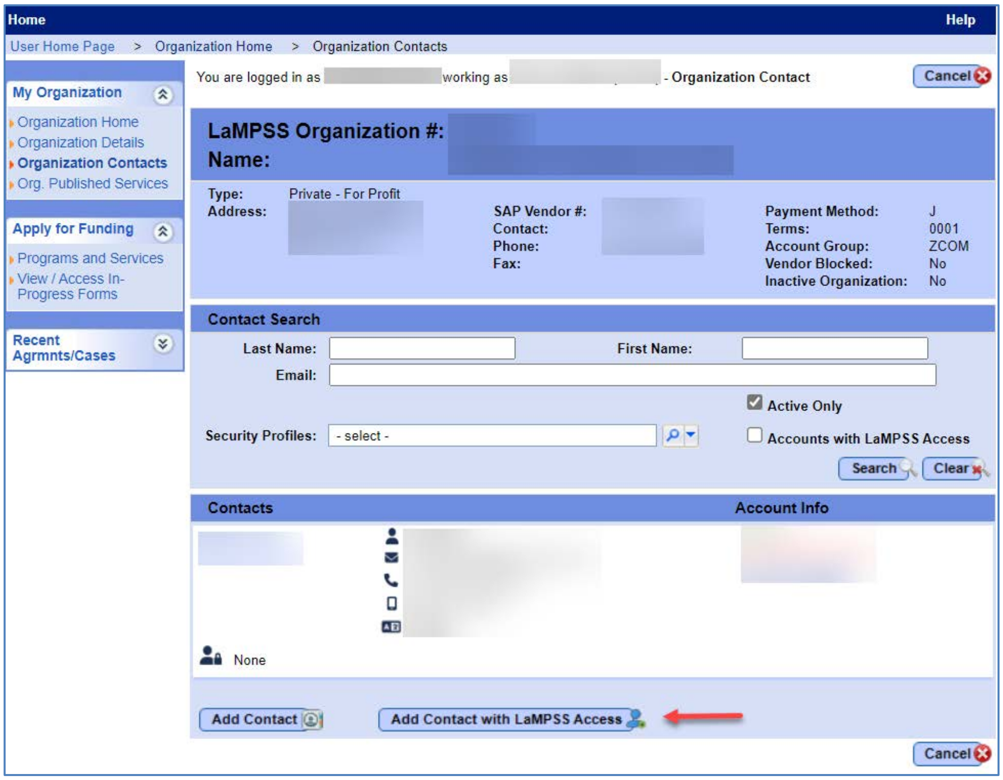

Select **"Organization Home"** from the left navigation bar.




Select **"Organization Contacts"** from the left navigation bar

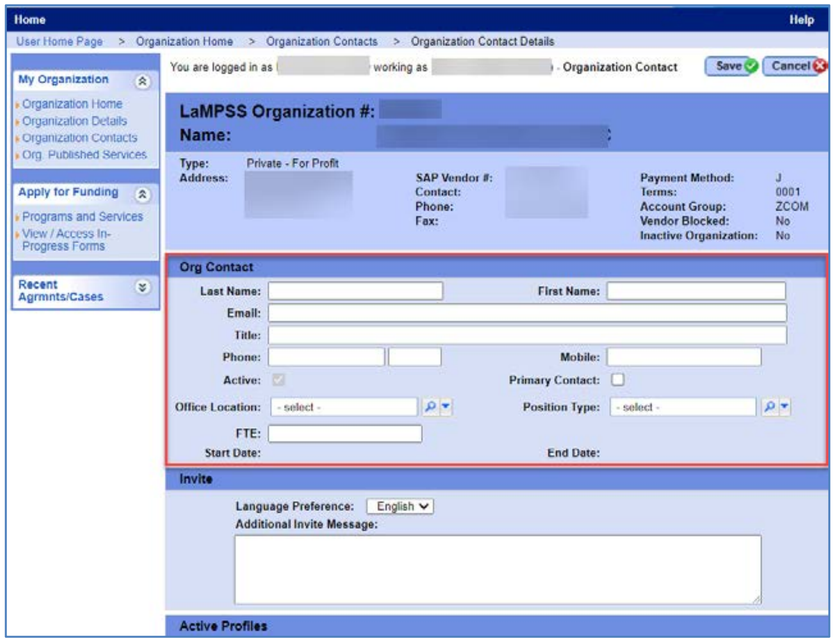


**Use the "Add Contact with LaMPSS Access" button on the Organization Contacts screen to enter the information for a new user or find the name of an existing user in the list if you only need to add Learner Management security to an existing role.**




*Only the Learner Management Administrator can assign Learner Management security roles.*

**Input the user's information in the Org Contact section. The "Last Name", "First Name", and "Email" are the only required fields to add a new LaMPSS user.**

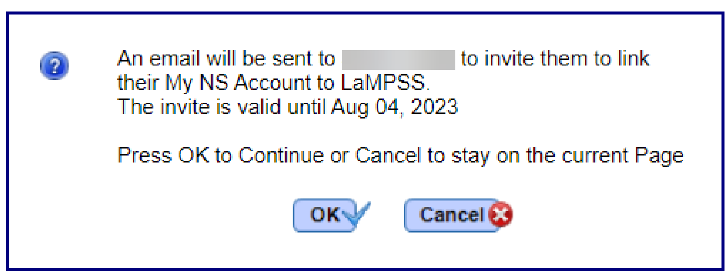



**Then select the Security Profiles for the user using the Active Profiles section.**

**Active Profiles**

| | Profile Name | Profile Details |
|---|---|---|
| ☐ | LM Manager | LM Manager |
| ☐ | LM View Only | LM View Only |
| ☐ | OFA Admin | Organization Funding Agreement/ Administrator |
| ☐ | OFA User | Organization Funding Agreement/ User |
| ☐ | OFA View Only | Organization Funding Agreement/ View Only |
| ☐ | Srvc Reg Admin | Service Registration Administrator |
| ☐ | Srvc Reg User | Service Registration User |
| ☐ | Srvc Reg View Only | Service Registration View Only |

**Click Save.** A message will display indicating the account was created and an email is sent.



# 4 KEY CONCEPTS

Before moving through the LaMPSS Learner Management case lifecycle and the NSSAL Common Processes, there are a few key concepts to remember for how Adult Learner's cases are managed in LaMPSS:

- An Adult Learner's case will be owned by a specific NSSAL service provider
- The case can be referred or transferred to another NSSAL service provider
- The case can be transferred to another NSSAL service provider
- The case remains "Active" between terms (e.g., summer)
- The case is "Closed" if it's believed the Adult Learner is exiting the NSSAL system
- If the Adult Learner exits the NSSAL system and later returns, the case is re-activated

The case for an Adult Learner will follow a status progression from Intake to Assessment, then Active status (i.e., in Program Delivery).

While active, the case may be put On Hold for a period of time. Finally, a case is Closed when the Adult Learner is exiting the NSSAL system.

These key concepts and the case lifecycle will be examined in more detail as you work through this guide.

# 5 INTAKE

## 5.1 Triage – COMMON PROCESS 1

Triage provides a welcoming environment by greeting the individual and having a conversation about why they contacted (or came into) your organization. It's an informal process to confirm that the person is in the right place.

Various tools or information may be used by your organization such as the NSSAL Triage Checklist.

Triage aims to ensure only those individuals interested in pursuing adult learning with NSSAL complete the detailed Intake form. This also prevents the collection and storage of personal information for individuals who are not being served by NSSAL service providers.

If it's determined NSSAL is right for the individual, they will be invited to continue with intake.

## 5.2 LaMPSS Intake Process – COMMON PROCESS 2

Intake includes gathering the information needed to create the Adult Learner's case in LaMPSS Learner Management as well as some additional information to help inform program recommendations. Intake is an opportunity to develop rapport with the Adult Learner and ensure they know what information is being gathered and how it will be used or shared.

### Intake Form

The Intake Form collects the information needed to create the Adult Learner's case in LaMPSS. The Intake Form, which can be found on the LaMPSS website (https://novascotia.ca/lae/lampss/lampss.asp), must be completed and signed by any Adult Learner whose information will be entered in LaMPSS.

The Intake Form includes privacy and consent information and requires a signature from the Adult Learner to indicate they understand how their information will be used.

Once completed by the Adult Learner, the information from the form is used to create a case in LaMPSS. The form should also be scanned and attached to the Adult Learner's case.

## Privacy & Consent

Protecting privacy requires a combination of privacy and security.

The FOIPOP (Freedom of Information and Protection of Privacy) Act sets rules for privacy management. It defines personal information and sets rules for the collection, use, disclosure, retention, and disposition of personal information. Personal information can only be used for the reason it was obtained or for a compatible purpose and be disclosed only with consent or for other reasons outlined in legislation.

**Privacy**

- The right to be let alone
- Refers to an individual's ability to determine what happens to their personal information
- A fundamental human right

**Confidentiality**

- An obligation
- You have access to information that enables you to perform your job and have an obligation to only share or disclose information when authorized to do so

**Security**

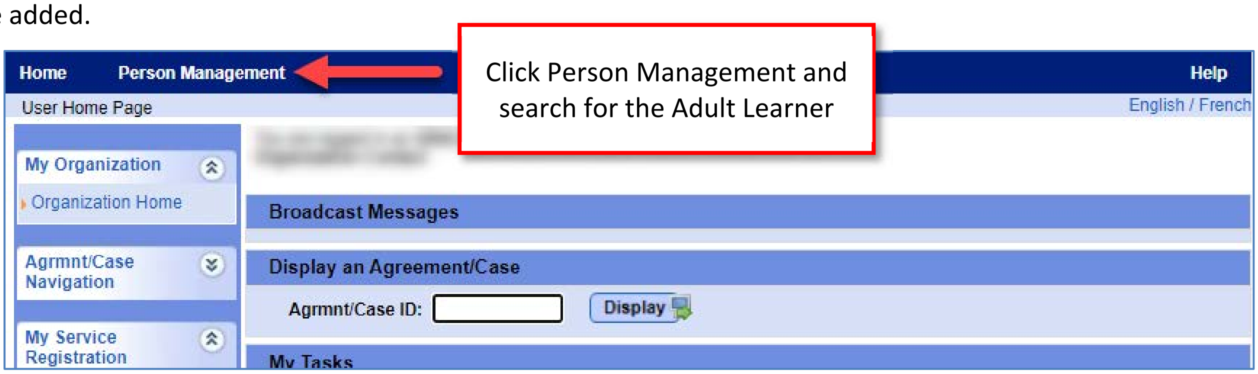
- The protections put in place to protect the confidentiality, integrity, and availability of information.

**As part of the Intake Form, the Adult Learner will sign a Collection, Use, and Disclosure of Personal Information statement.** This statement explains the personal information being collected will only be used and disclosed in keeping with the access and privacy provisions of the Nova Scotia FOIPOP Act and the Nova Scotia PIIDPA (Personal Information International Disclosure Protection) Act.

It informs the Adult Learner that personal information collected is used only for providing the Adult Learner with services (e.g., registration for programs, determining eligibility to services) and personal information is only disclosed as required to fulfill the purpose(s) of the program or service, and only to the extent authorized by law.

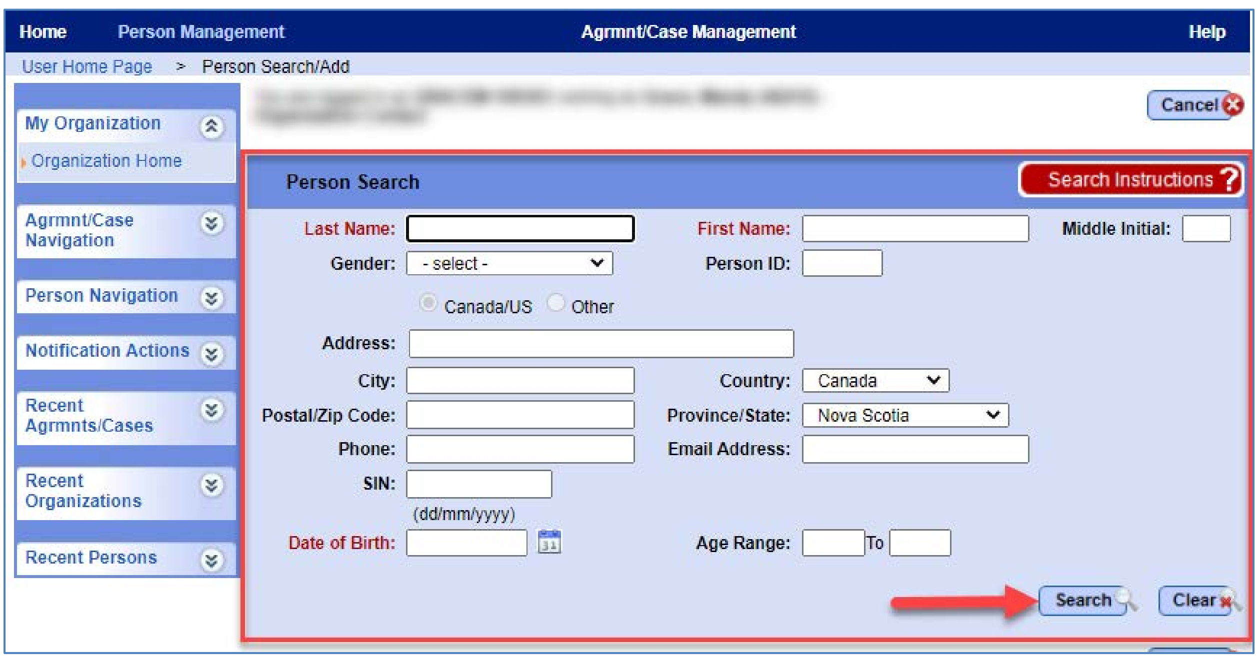
## Search for and Add a Person

**Start by clicking Person Management in the top menu bar of LaMPSS.** You will search for the Adult Learner to determine if they have previously been added to the system by your organization. If not found, the person can be added.




The Person Search/ Add screen will appear. **Search for the Adult Learner using the details from the Intake Form.** Any of the parameters seen on the Person Search/Add screen can be used to search for a person. Most often, you will likely search using First/Last Name or Social Insurance Number (SIN), but any of the parameters can be used to narrow the search results.

If a search by SIN is not successful, you should clear the SIN and search again with just Last Name and the first letter of the First Name.

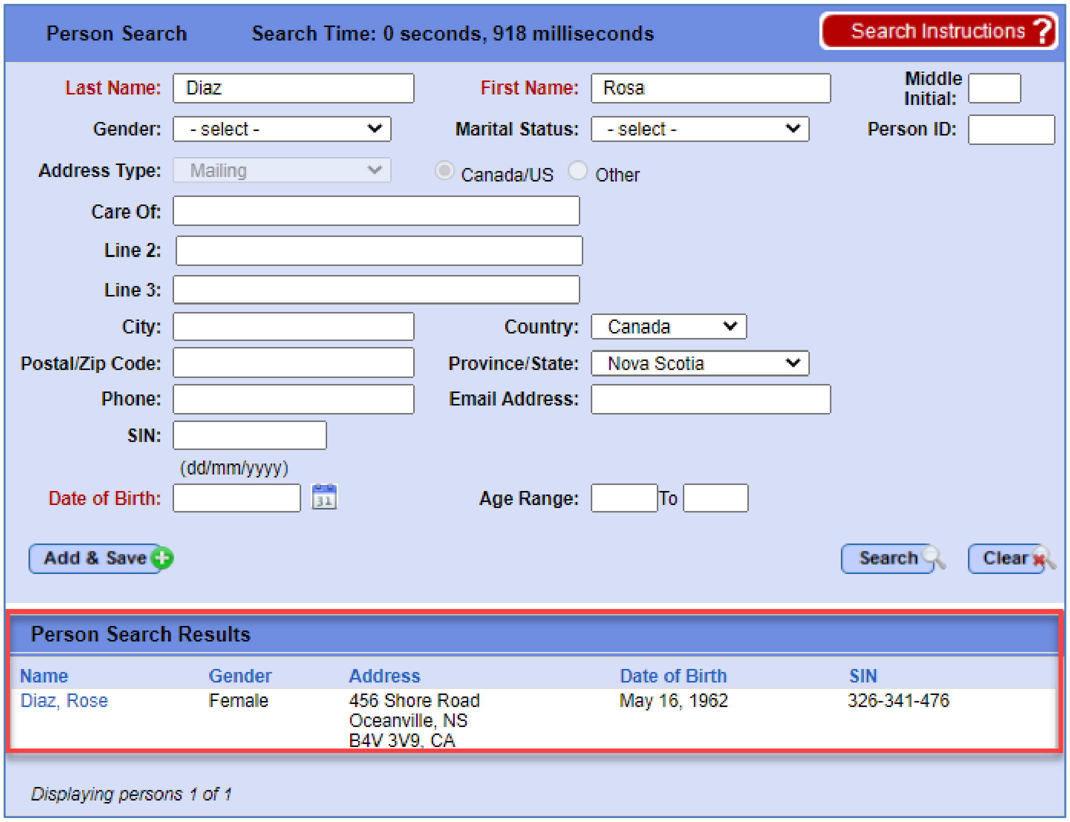



A few key features of the Person Search to remember:

- LaMPSS uses cumulative searching, so the more search criteria you enter, the more defined the search results. It's best to start with less information (e.g., First/Last Name only) then add more if there are too many results!
- Search will use a Soundex ability when Last name and/or First name are entered. Soundex allows similar sounding names to be displayed in the search results.
- Partial searching is available for First Name, Last Name, and Address.

*You must search for the person before LaMPSS will provide the ability to add a new LaMPSS person. This aims to help prevent duplicate persons from being added to the system.*

**The Person Search Results module will display any results below the search criteria.** The first 100 results will be returned with 10 records per page. The Person Search Results provide key information to help you identify the correct person.

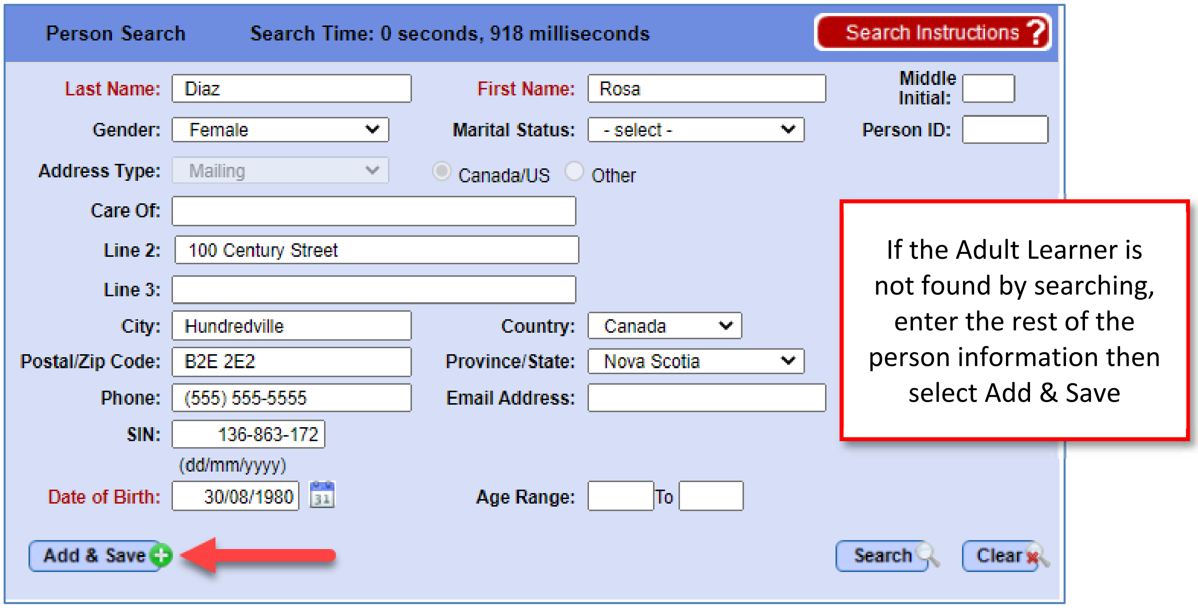



If the Adult Learner is not found in the Person Search Results, the required person data can be entered in the search criteria fields and the **Add & Save** button selected to create a new LaMPSS Person.

To add a new LaMPSS Person, the required fields are:

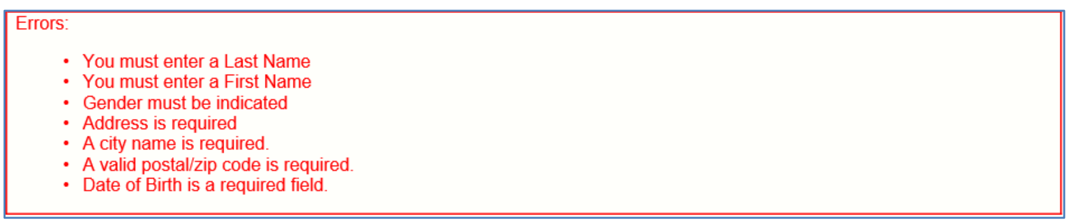
- Last Name
- First Name
- Gender
- Address (including city and postal code)
- Date of Birth

*Although SIN is not a required field to add a Person to LaMPSS, it is required to create a Learner Management case and to register a participant in NSSAL services. You will later encounter an error if SIN is not provided.*




Once these fields (at a minimum) are completed, click the Add & Save button to add the person to LaMPSS. A warning message will ask you to confirm the action.


If any of the requested fields are not completed, an error message will appear at the top of the window indicating the required information.




The missing information can be entered, then Add & Save clicked again.

## Share Person with Government

As part of adding the person to LaMPSS, the system will guide you through the process of sharing the person with government and merging records if potential matches for the person are found.

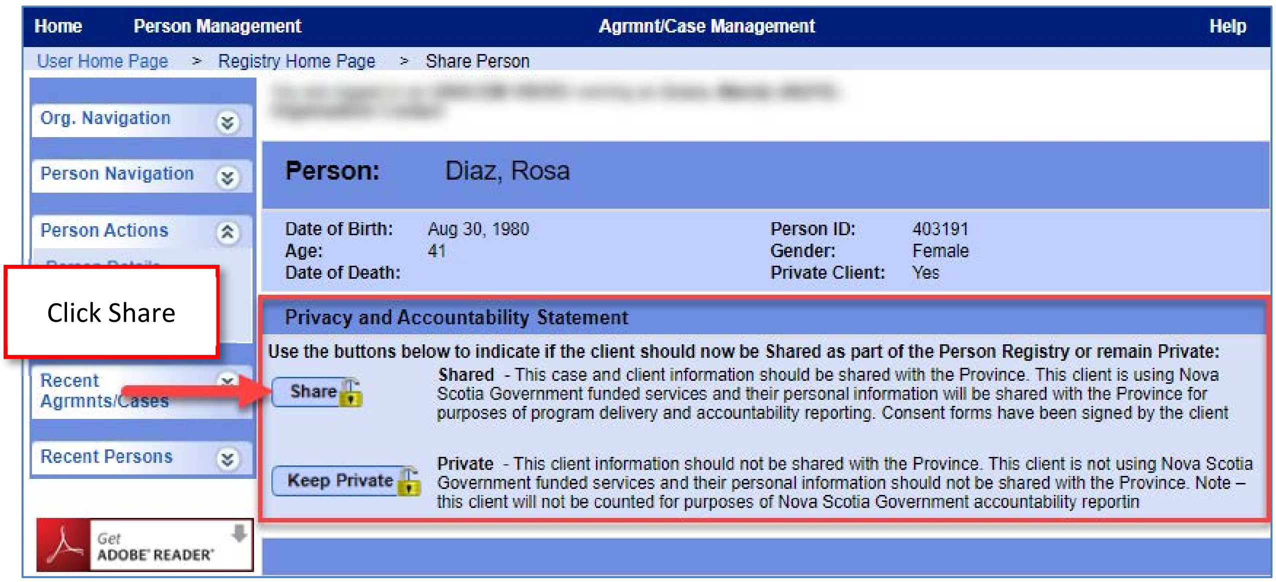
When a person is added to LaMPSS, the person is initially visible only to other users from the same organization.

Through the Share Person functionality, the person can be shared with government.

As a part of the process, LaMPSS will search other shared person records to make sure the person has not already been created by another service provider. If so, you will be presented with option to merge your newly added person with the existing person in LaMPSS.

*To be eligible to participate in funded services (i.e., public services), a person must be shared with government. If you attempt to register a private person in a funded service or to create a case, LaMPSS will display an error message notifying you the person must be shared with government.*

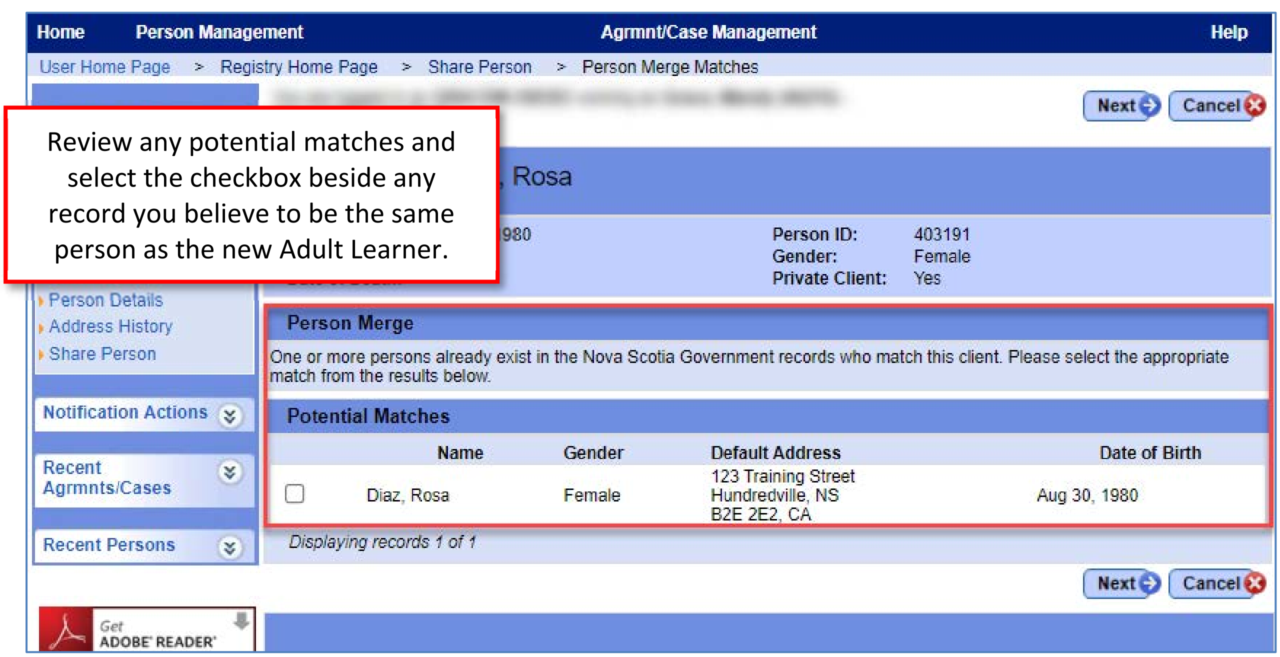
**After clicking OK on the warning message to add the person, the Share Person screen will appear.**




**Click Share.**

If no potential matches for the current person are found in LaMPSS, a message will display, and you will click Next to continue with the sharing process.

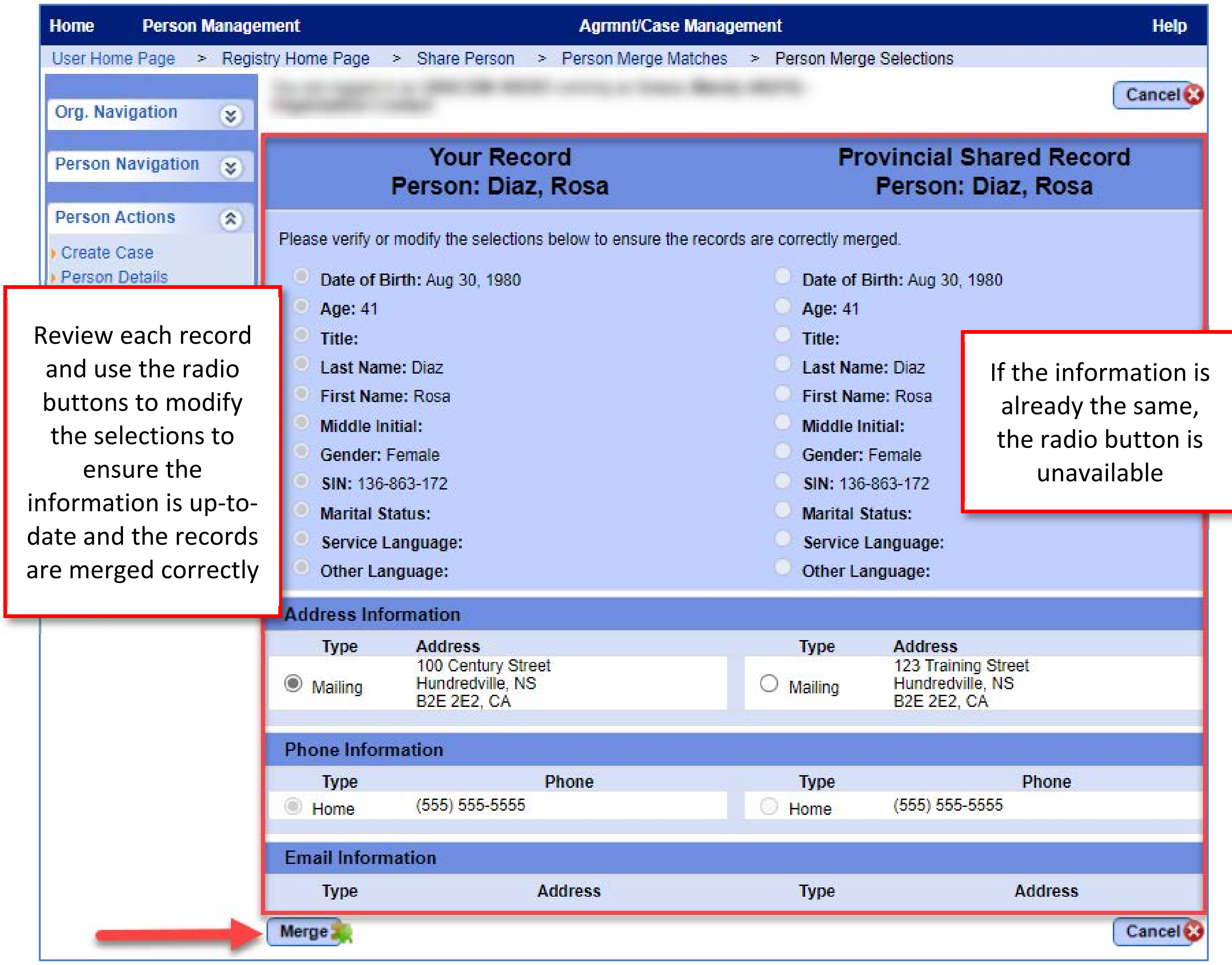
If potential matches are found, LaMPSS will display the Person Merge screen with Potential Matches listed.




**You will review any potential matches and select the checkbox beside any record you believe to be the same person as the new Adult Learner.**

The name, gender, address, date of birth and Social Insurance Number (if known) will be displayed to help you determine if one of the records is a match for the person you are adding.

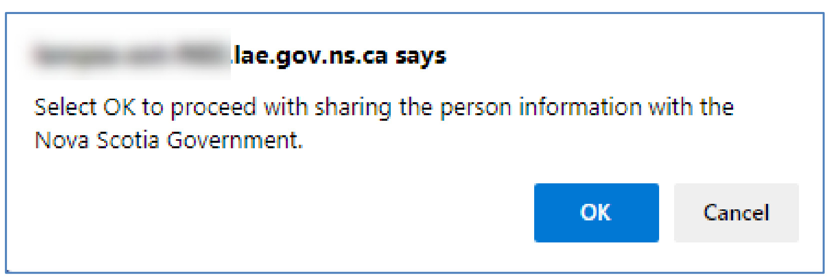
**Click Next to continue.** LaMPSS will display the newly added person side-by-side with the existing shared record.




**When you have verified all information, click the Merge button at the bottom of the screen.**

LaMPSS will display a message requesting you to confirm you wish to proceed.

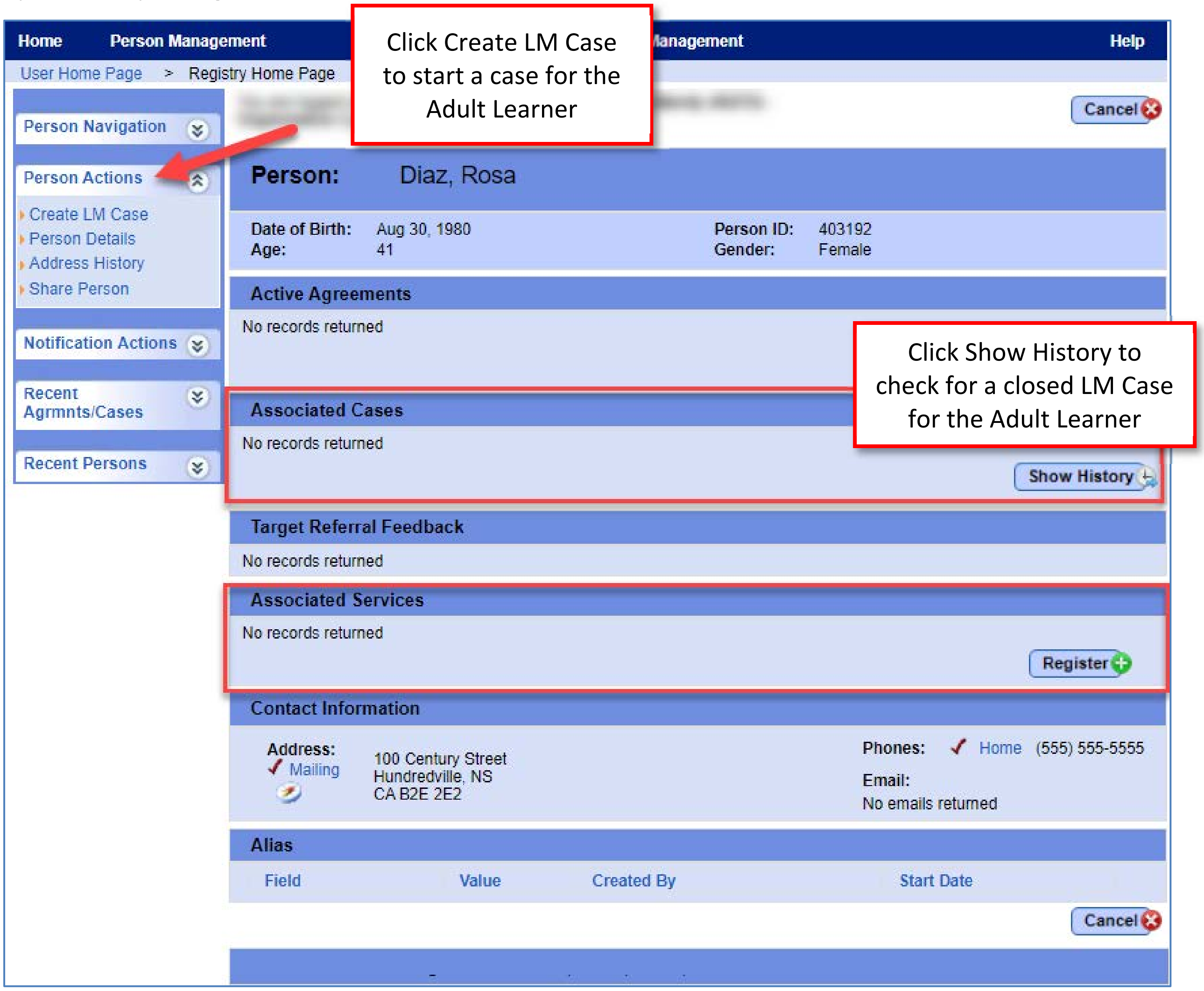
**Click OK** to complete the process merge and sharing of the person information with the Nova Scotia government.




**The Person Homepage will display.**

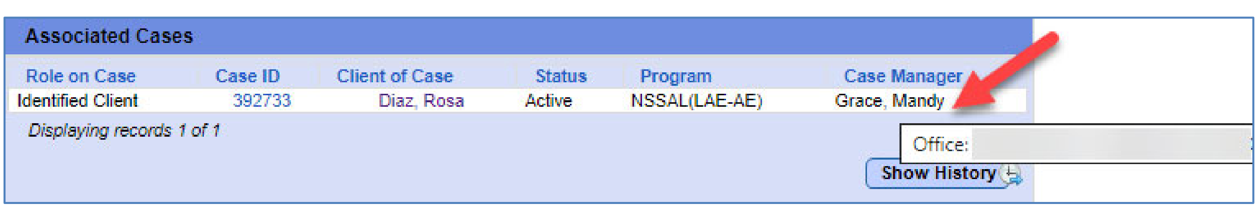
## Person Homepage Overview

The Person Homepage displays key details about the person including any active funding agreements with government, any active cases with Nova Scotia Works or NSSAL Learner Management, and Associated Services the person may be registered in.




Use the Show History button for Associated Cases to display any past, closed cases for this person. If the person previously had a NSSAL-LM case, refer to the steps in Re-open a Previous NSSAL-LM Case for next steps.

*If there is a case displayed in the Associated Cases, you can hover over the Case Manager name to see the name of the Organization who has responsibility for the case, as pictured below.*

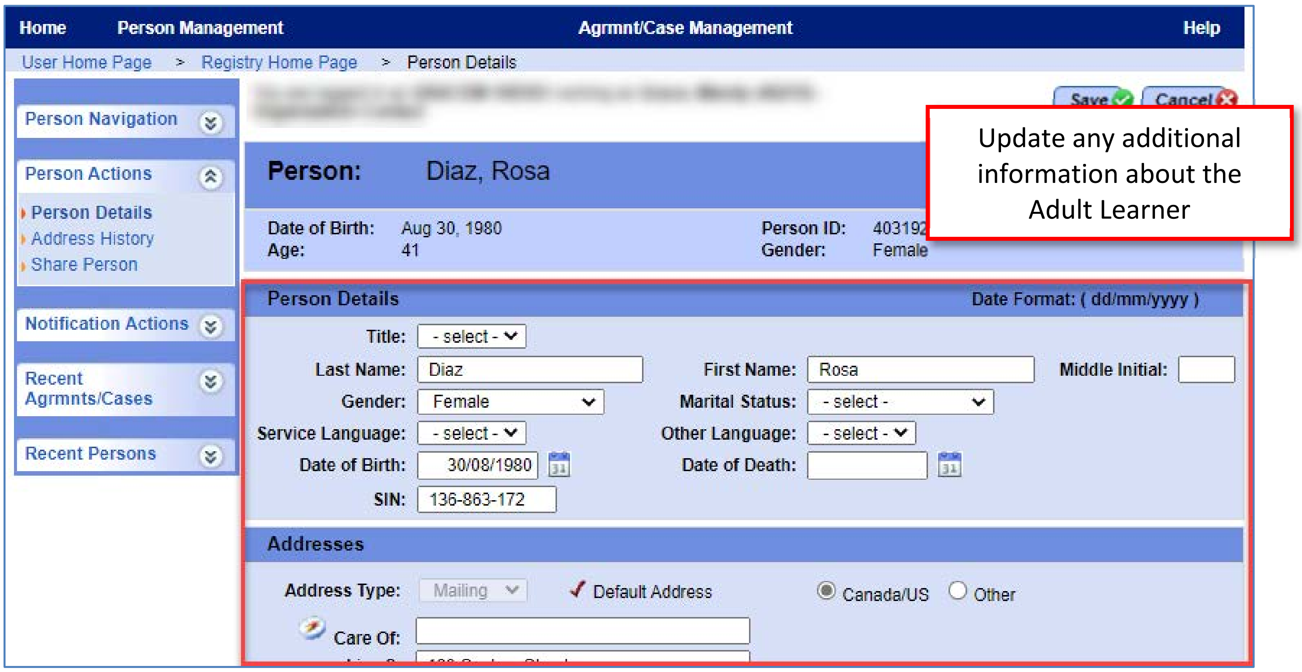


In the left navigation menu under Person Actions, you can access options to create a new case, visit the Person Details page, or view historical addresses in the system for this person.

**Before creating a case, use the Person Details page to enter any additional known information from the LM Intake Form**

## Person Details

Person Details not entered when the person was added to LaMPSS can be updated on the Person Details page. There are fields to capture additional information, such as the Adult Learner's preferred service language.

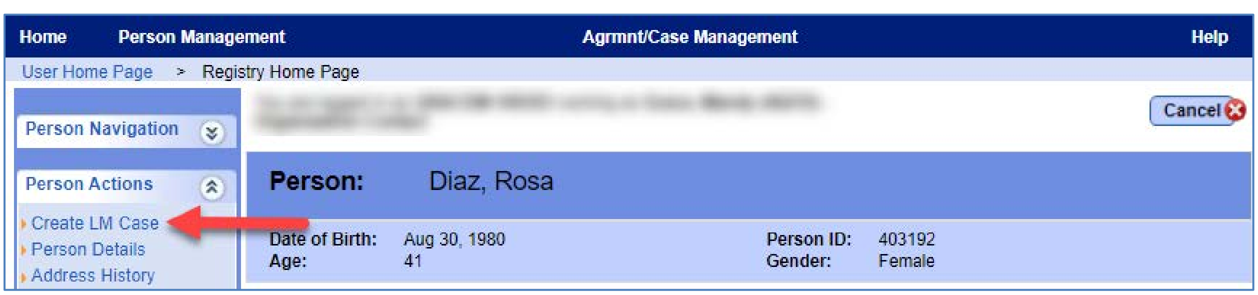



If the Adult Learner changes their contact information (e.g., phone number, email address, mailing address) the new information can be captured here.

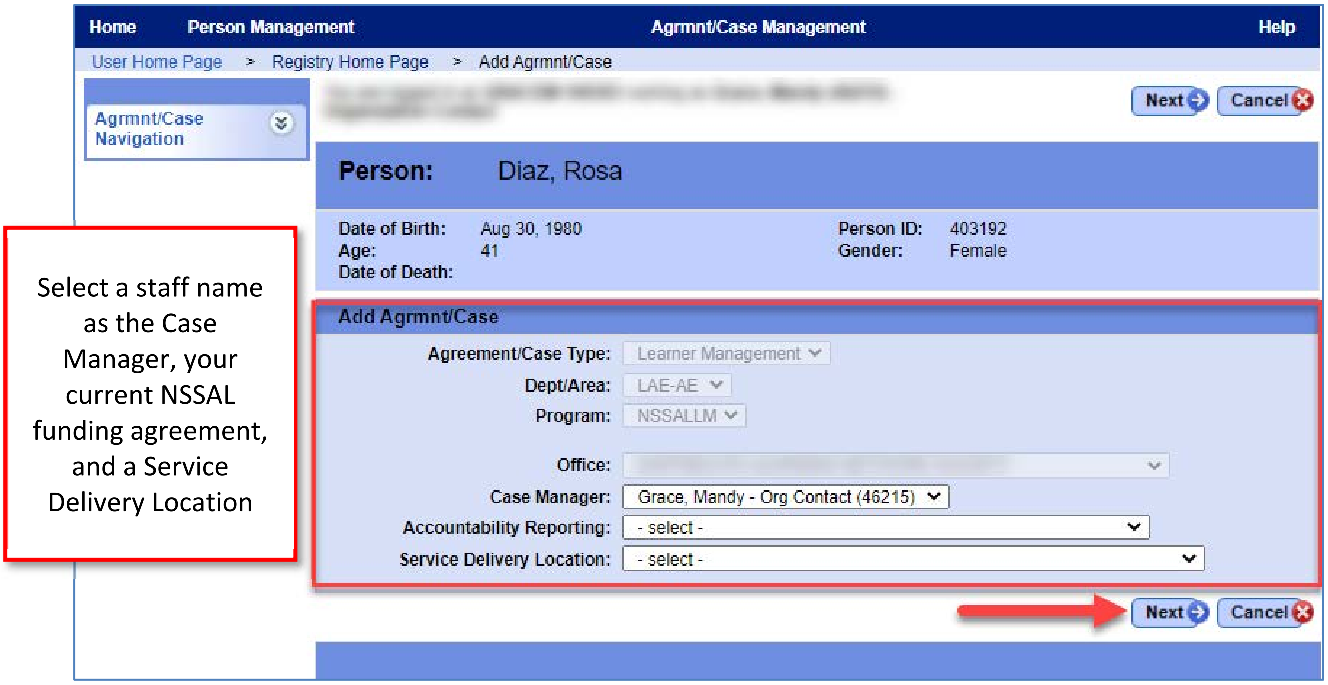
**When any desired details have been updated, click Save to return to the Person Homepage.**

## Create a Case

To create a new case, select Create LM Case in the left-navigation menu of the Person Homepage.



**You will be taken to the next screen where key details about the case can be captured.**



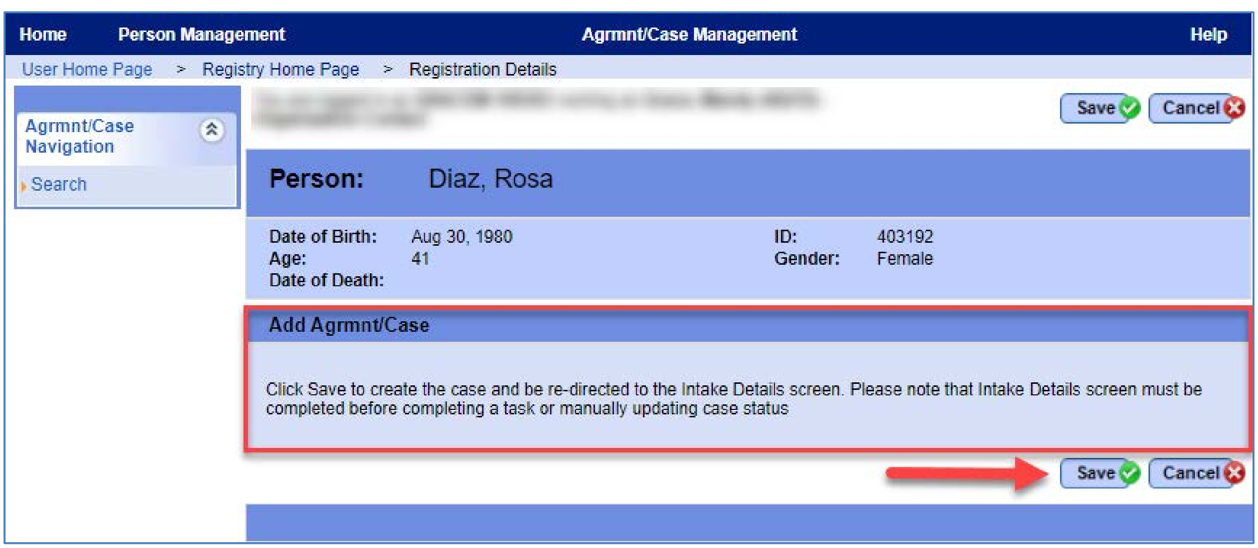

You will need to select a Case Manager who will be assigned to this Adult Learner. This drop-down list will display staff from your organization who are setup in LaMPSS.

You will also select your current NSSAL funding agreement from the Accountability Reporting drop-down list.

Finally, you will select your organization's location in the Service Delivery Location drop-down list.

**Click Next to continue.** The case is not created until you complete the following step.

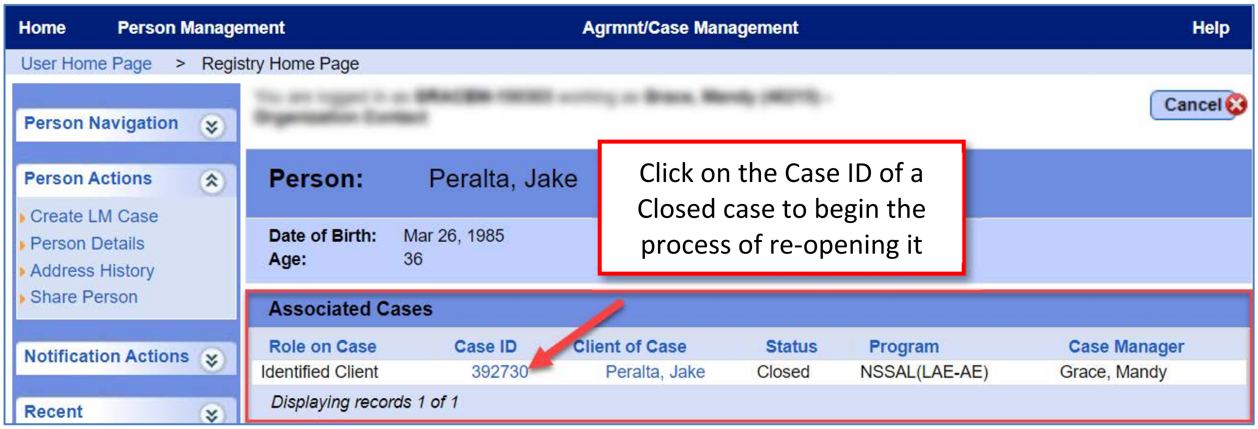
**A message will appear directing you to click Save to create the case and be re-directed to the Intake Details screen, which is the first part of the case information in LaMPSS that should be entered.**



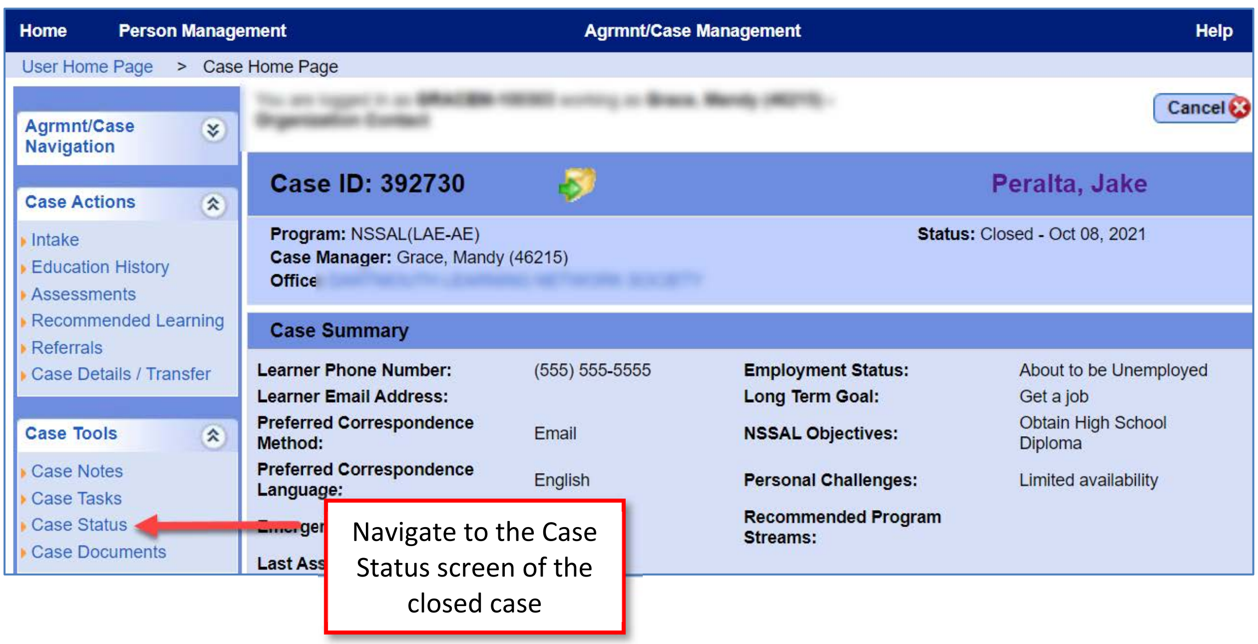

**Click Save to continue and create the case for the Adult Learner.**

## Re-open a Previous NSSAL-LM Case

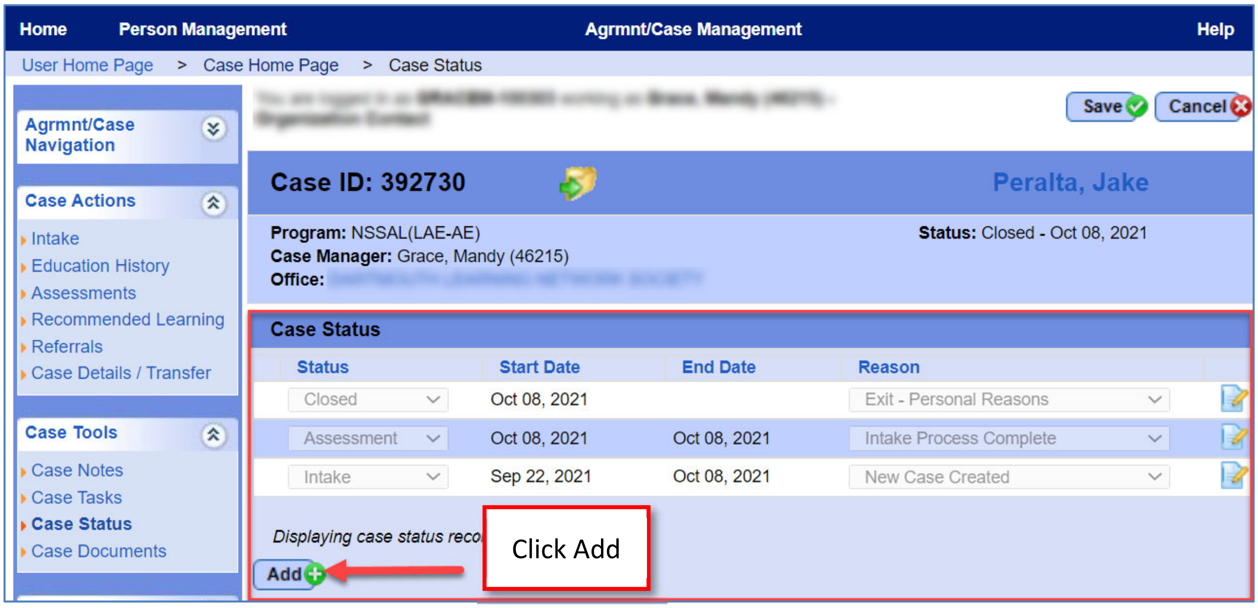
If a NSSAL-LM Case previously existed for the Adult Learner, you do not need to create a new one. **Instead, click on the Case ID in the Associated Cases section of the Person Homepage to navigate to the case to re-open it for Intake.**




**From the Case Homepage, select Case Status in the left navigation menu.**

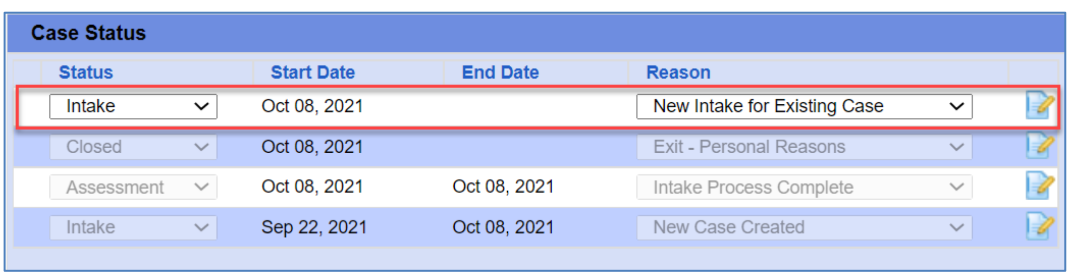


**On the Case Status screen, use the Add button to create a new row.** The status history of the case can be reviewed here. You will be able to see if this is the first time the case has been re-opened as well as any reasons for the case being previously closed.



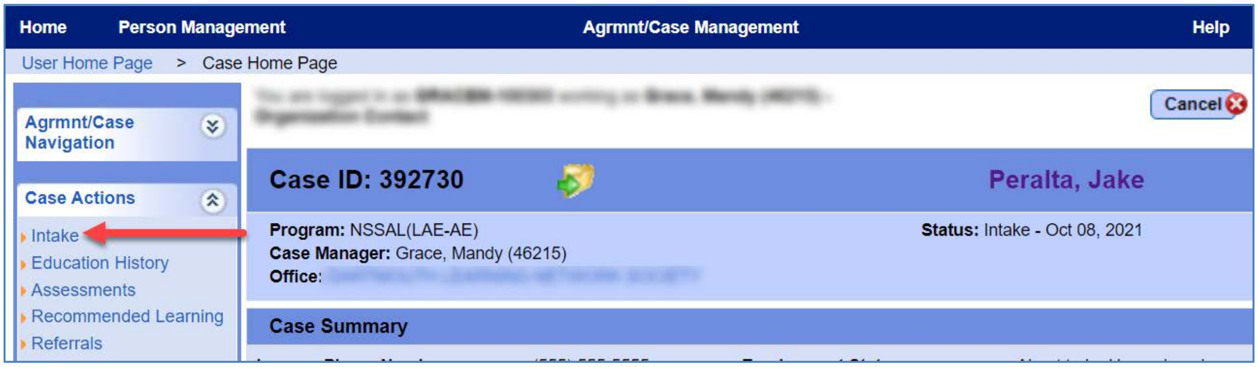

**From the Status drop-down, select Intake.**


**From the Reason drop-down, select New Intake for Existing Case.** You can also use the Case Note icon to the right of the row to make a note about the circumstances for re-opening the case.




**Click Save to complete the process of re-opening the case.** You will be redirected to the Case Homepage.

**Select the Intake Details screen from the Case Actions section in the left navigation menu to continue and enter new intake information for the Adult Learner.**



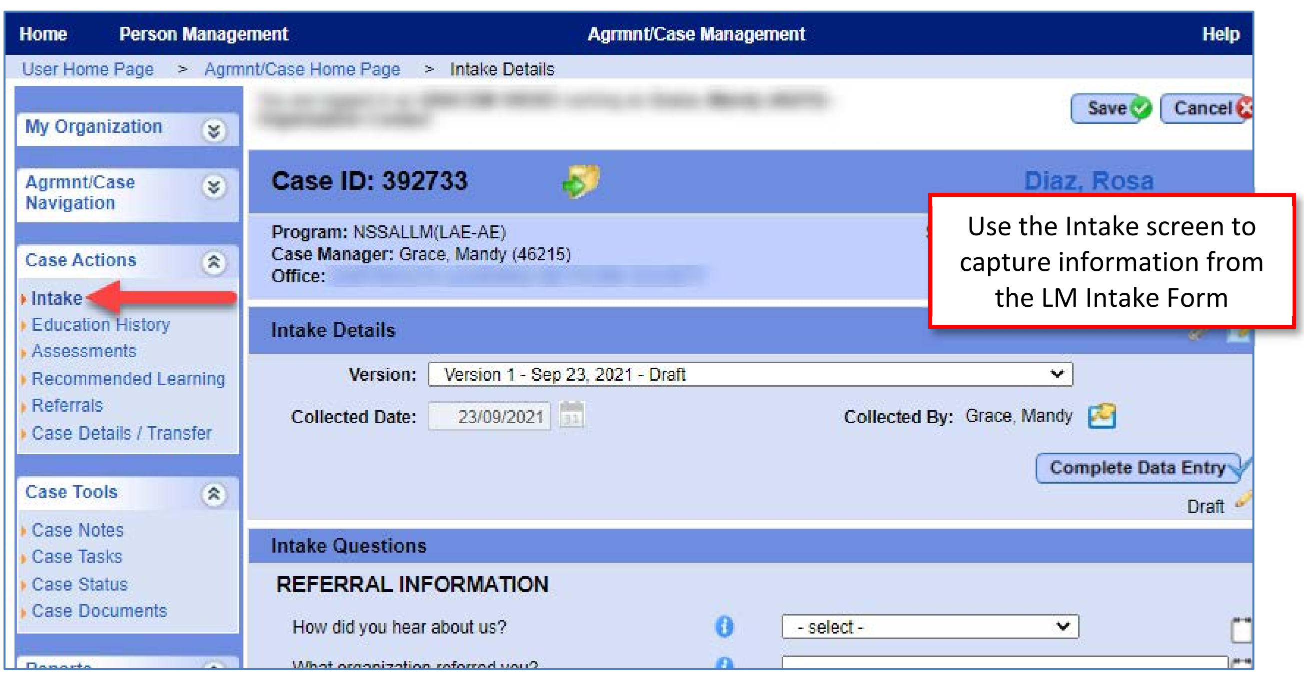

## Enter Intake Information

The Intake Details screen is the first of the screens listed in Case Actions in the left navigation menu. To move through the case lifecycle in LaMPSS you will move down through each of these screens.

**The first time you view this screen, the Version will automatically be Version 1 with the current date.** If you are capturing information gathered from the client on the LM Intake Form on a different day, use the calendar by the Collected Date field to reflect the date the information was gathered.

If you re-opened a closed case, the information previously captured will display as the current version. Instead of a Complete Data Entry button, you will initially see a Create New Version button.

Click the button to create a new version for editing. Some information will carry forward from the previous case, while other information will need to be entered. The previous case intake information can be updated as required, even where it is copied forward.

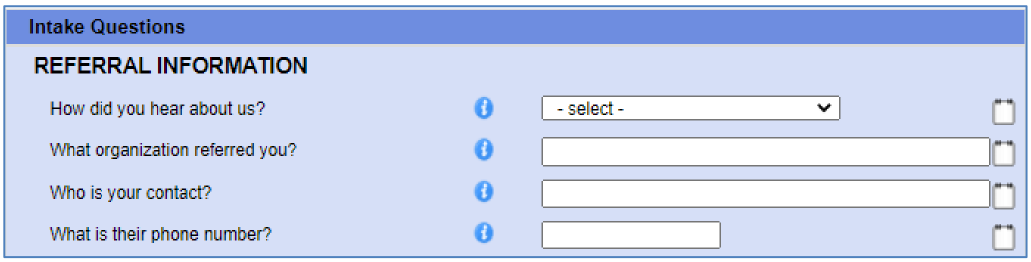



**Next, you will move through each section of the Intake Details, capturing the available information about the Adult Learner.**

A few items to note as you complete the screen:

- Any fields marked with a green checkmark are required before you can complete the data entry for intake; however, you can save the screen using the Save button at the top or bottom of the screen, and return to finish entering information at a different time.
- Use the blue information icon to display more detail on what the field is intending to capture or how to best provide a response.
- Use the notepad, found to the far right of each question, to provide any notes or additional information about the response.

The first section of Intake Questions relates to **Referral Information**. These questions capture how the Adult Learner heard about you and details of any referring organization.

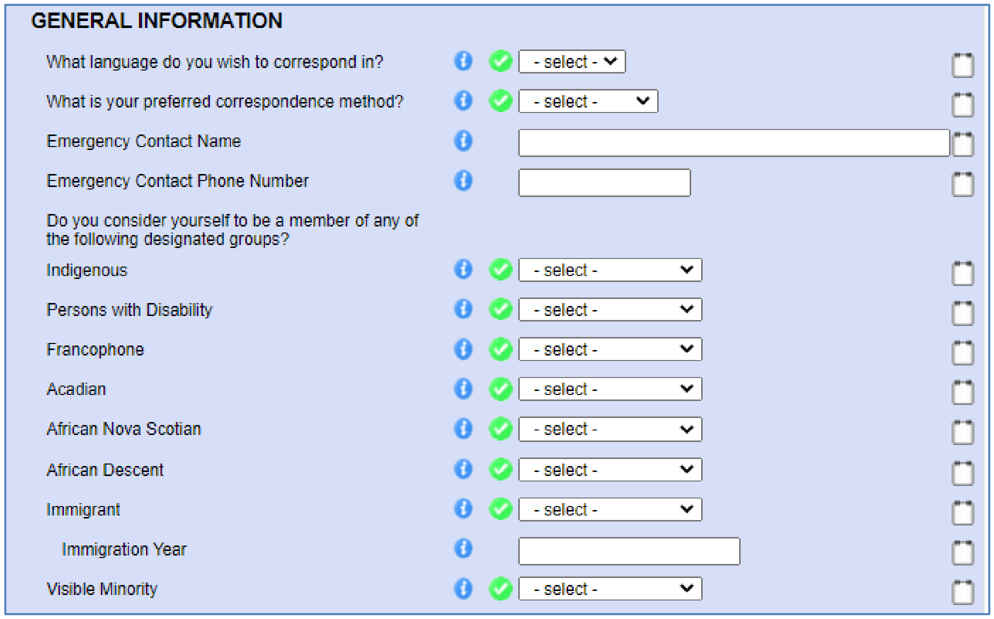



The next section of Intake Questions is **Eligibility Information**. These questions capture whether the Adult Learner is eligible for services through NSSAL.


*Through the triage process, it is likely only those eligible will proceed to intake.*

The next section of Intake Questions is **General Information.**

These questions capture information that will assist in serving the Adult Learner as well as their designated group membership.


GENERAL INFORMATION

What language do you wish to correspond in? - select -

What is your preferred correspondence method? - select -

Emergency Contact Name

Emergency Contact Phone Number

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

Indigenous - select -

Persons with Disability - select -

Francophone - select -

Acadian - select -

African Nova Scotian - select -

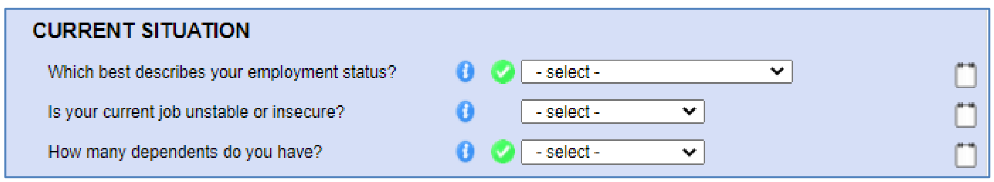
African Descent - select -

Immigrant - select -

Immigration Year

Visible Minority - select -

The next section of Intake Questions is **Current Situation** and focuses on the person's employment and dependents.

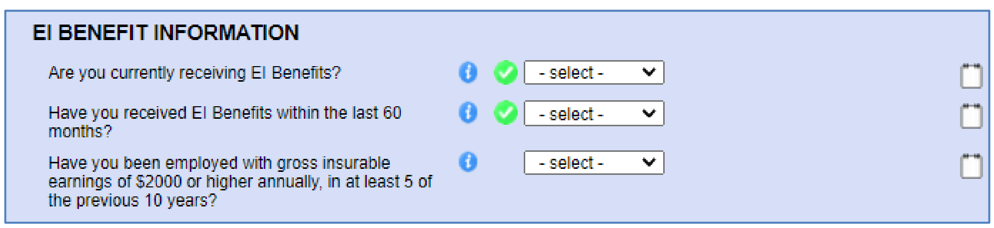

CURRENT SITUATION

Which best describes your employment status? - select -

Is your current job unstable or insecure? - select -

How many dependents do you have? - select -

The next section of Intake Questions **is EI Benefit Information** and provides detail on any benefits being received and some employment history.


EI BENEFIT INFORMATION

Are you currently receiving EI Benefits? - select -

Have you received EI Benefits within the last 60 months? - select -

Have you been employed with gross insurable earnings of $2000 or higher annually, in at least 5 of the previous 10 years? - select -

The final section of Intake Questions relates to the client's **Service Participation Situation**. These questions capture information that will be important as the person begins to work with your organization


SERVICE PARTICIPATION SITUATION

Why did you discontinue (leave) school? - select -

Have you taken any upgrading programs since you left school? - select -

Are there any other agencies assisting you with education and employment-related needs or planning? - select -

What is your long-term goal that you're hoping this program will help you achieve? - select -

How do you think NSSAL can help you achieve this goal? - select -

How many hours a week can you commit to attending class?

When are the most convenient times for you to participate in learning programs? - select -

Would you be interested in participating in online and blended learning? - select -

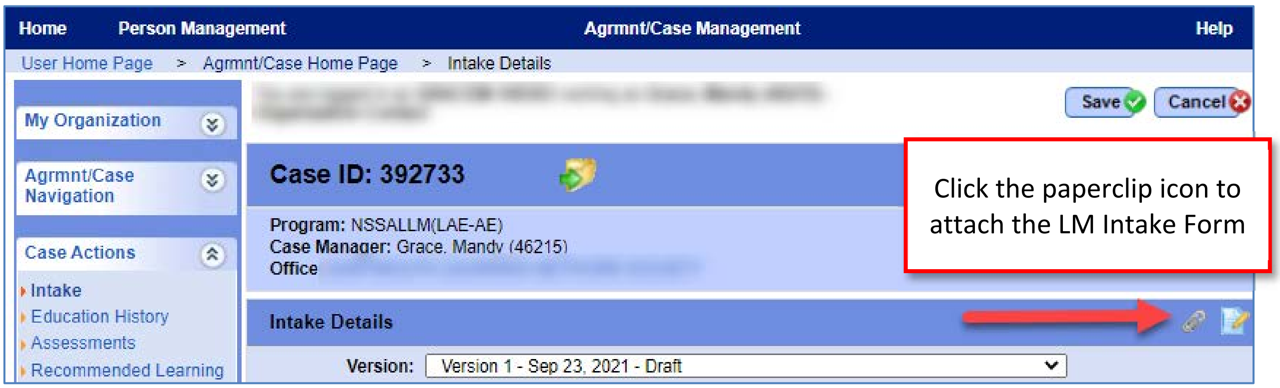
Do you have sufficient ability and access to technology and internet to participate in online learning? - select -

Do you have access to transportation? - select -

Do you have any personal challenges that may interfere with your ability to attend class? - select -

Remember, you can partially complete and save this screen as many times as necessary. It does not need to be fully completed at once. Each time you save you will be redirected to the Case Homepage and can use the left navigation menu to return to the Intake screen.

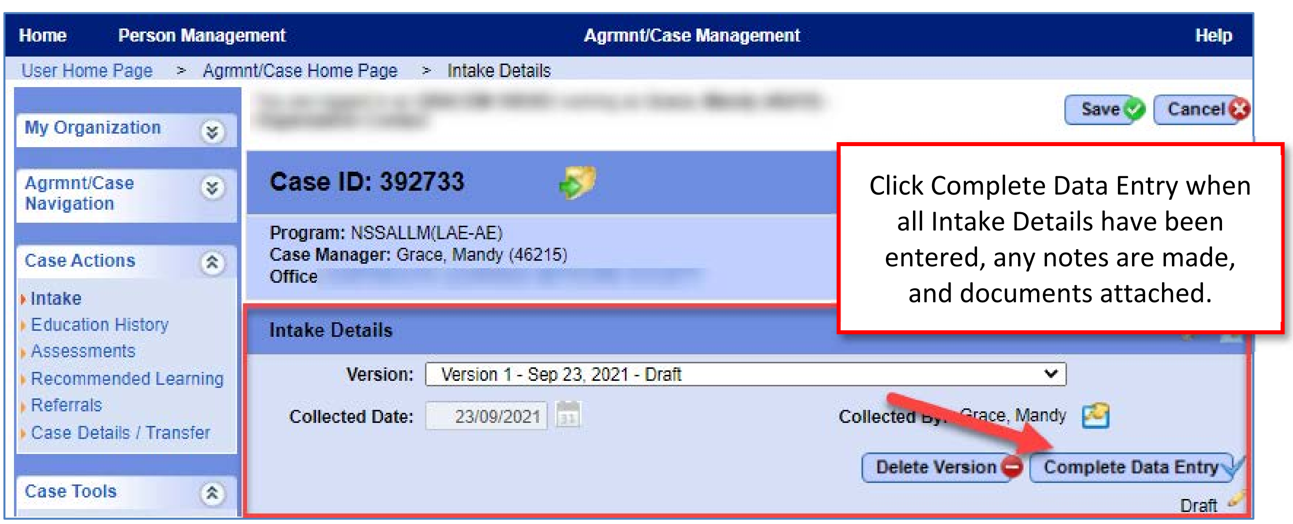
**In addition to capturing the information within the fields on the screen, it's also important that you attach the signed LM Intake Form including the person's consent for their information to be captured and stored in LaMPSS.**




**To attach the LM Intake Form (or any other desired supporting documents) to the Intake screen:**

- Click on the paperclip icon in the Intake Details header
- In the Document window that appears browse and attach the desired file, enter a Document Name, and choose the most relevant option from the list of Document Topics
- Click Save to attach the document

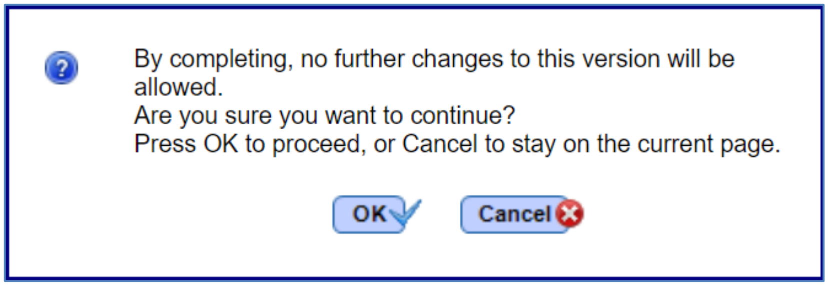
**When you are confident you have captured the relevant Intake Details, including any mandatory fields, click the Complete Data Entry button in the top section of the screen.**




**LaMPSS will validate that all required information has been provided.** If any required questions have not been answered an error message will display in red text at the top of the screen directing you to complete the missing information. Those questions will also appear with a red "x" beside them in the list to easily identify what is incomplete.

**A warning message will confirm you want to mark the Intake Details as complete.**

Once completed, this version of the Intake Details will be locked down (i.e., greyed out) and can no longer be changed.

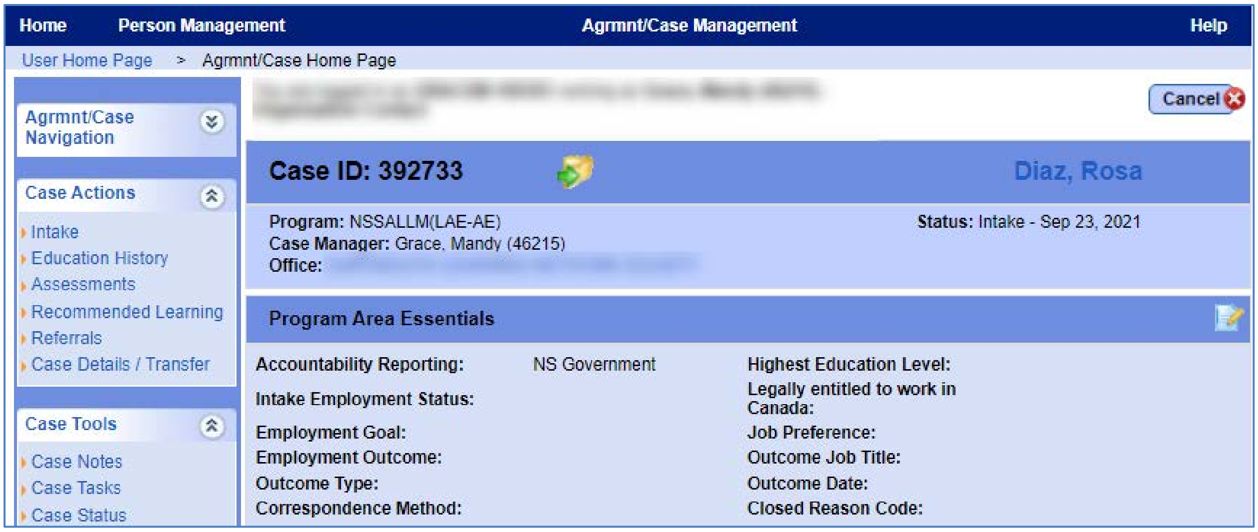



**The Complete Data Entry button is replaced by a Create New Version button.** This button will create a new version that can be edited. Some information is carried forward from the previous version, which can also be viewed by selecting it from the Version drop-down list.

*The Delete Version button deletes a version of intake that has not yet been completed. Once you complete data entry, the version cannot be deleted.*

## Case Homepage Overview

In most situations, when a case screen is saved you will be redirected to the Case Homepage. As more information is provided on the case screens, key details will populate the Program Area Essentials on the Case Homepage as an at-a-glance summary of this Adult Learner's case.



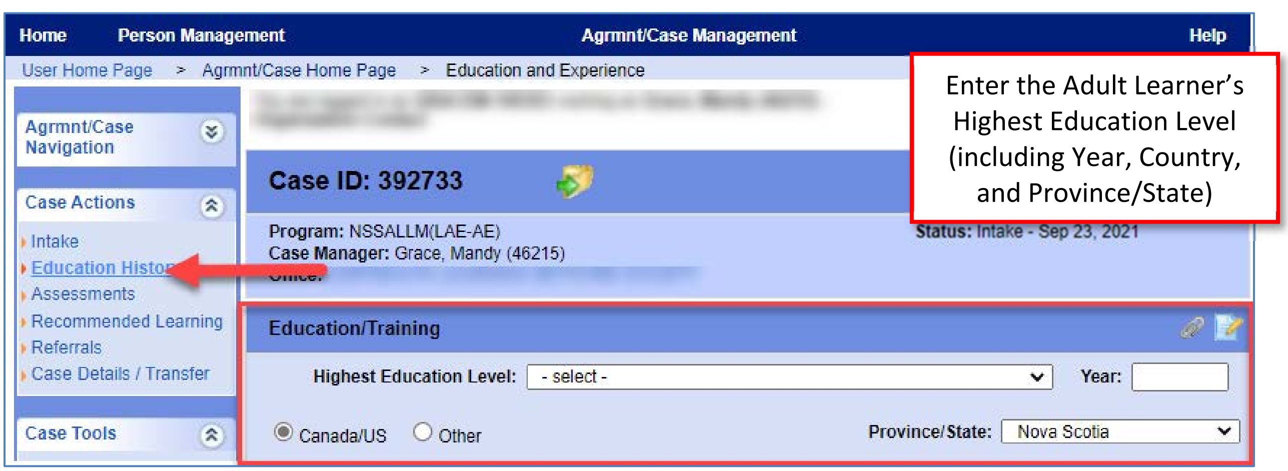

The Case Homepage also has an Associated NSSAL Services section that will display any services this person is currently registered for, with your organization or another. See the Service Registration section of this guide for more information

Current tasks or notifications will also display on the Case Homepage. See the Case Tasks and Notifications section of this guide for more information.

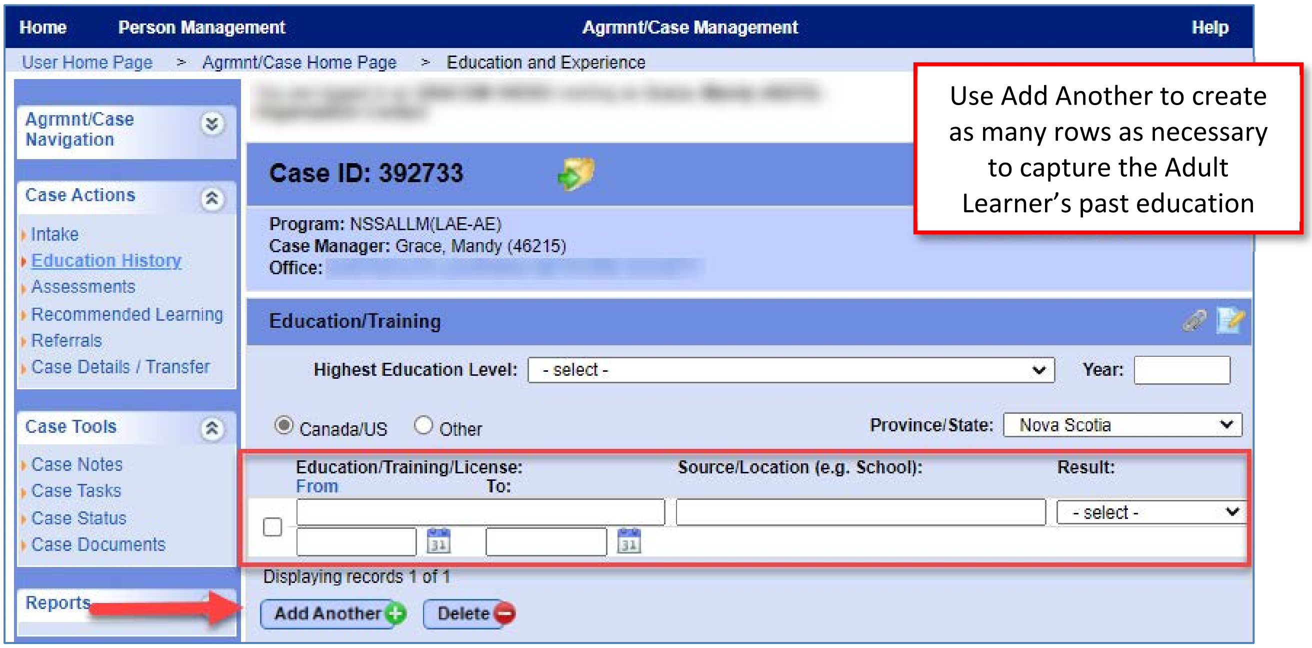
## Enter Education History

The next step in creating a case is to capture the Adult Learner's education history in LaMPSS. **Use the left navigation menu to navigate to the Education History screen.**

Information from the LM Intake Form should be used to enter the Highest Education Level from the drop-down list at the top of the screen. Once selected, the Year, Country and Province or State for that education must also be entered.



**Then, rows can be added to the Education/Training/License section of the screen to capture details of any education history provided.** If no additional education information is provided, just the Highest Education Level can be entered.




**For each record you will need to provide:**

- The name of the Education/Training/License program
- Source/Location (e.g., School)
- Result
- From/To dates

If the Result is In Progress, then the To Date will not be required as the person is still engaged in the program.

*Where the precise date is unknown (e.g., far in the past and not remembered) use the best approximation, such as the first or last day of the month the program is known to have begun.*

Both Case Notes and Case Documents can be added to the screen using the icons in the Education/Training Header to provide additional detail, proof of completion, or other information about the Adult Learner's education history.

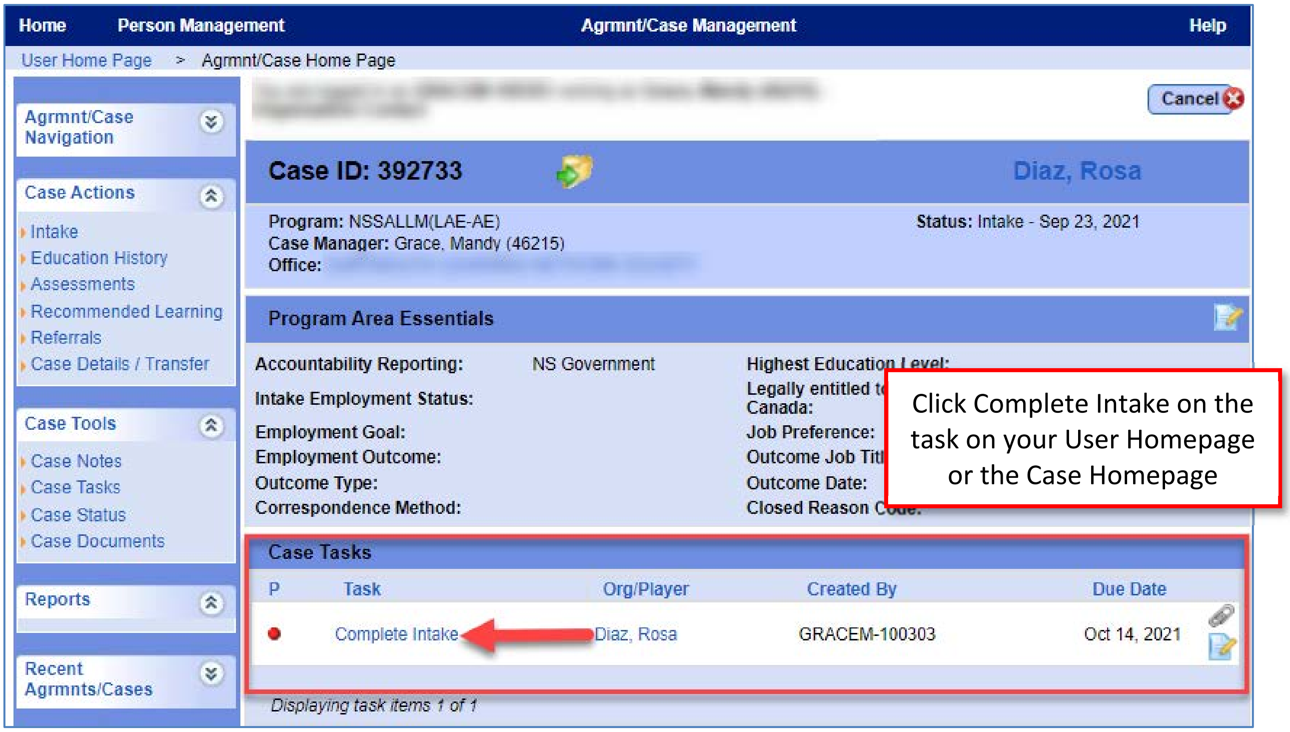
To delete a row entered in error, check the box to the left of the row and then the Delete button.

## 5.3 Complete LaMPSS Intake

Once the Intake Details and Education History are entered, you are ready to complete intake and move the Adult Learner's case into Assessment in the system.

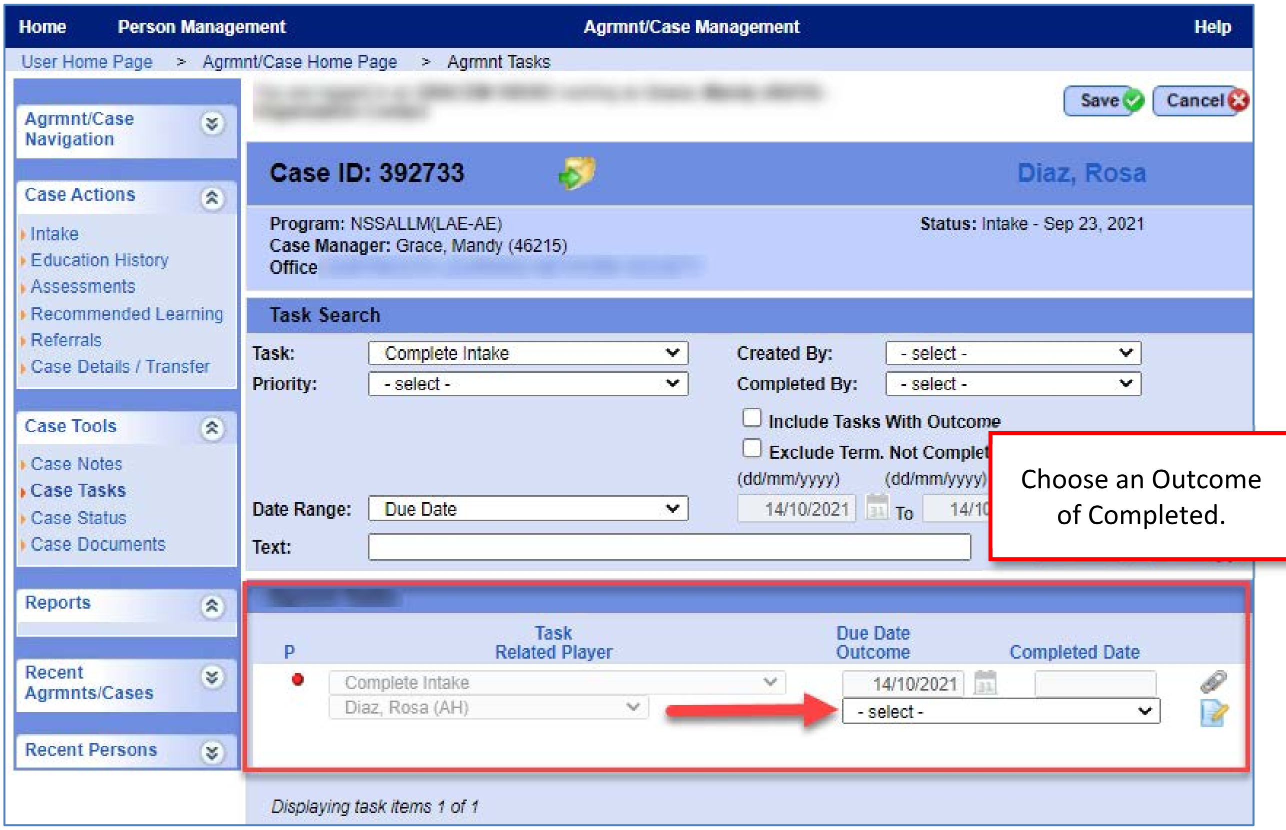
To do this, you will record an outcome on the Complete Intake task for the case.

**Navigate to the Case Tasks screen by clicking on the Complete Intake hyperlink in the task on your User Homepage or on the Case Homepage.**




**The Case Task screen will display with the currently due task in the middle section of the screen.**

The top section of the screen is used to search for other tasks, but to complete a task use the middle section.

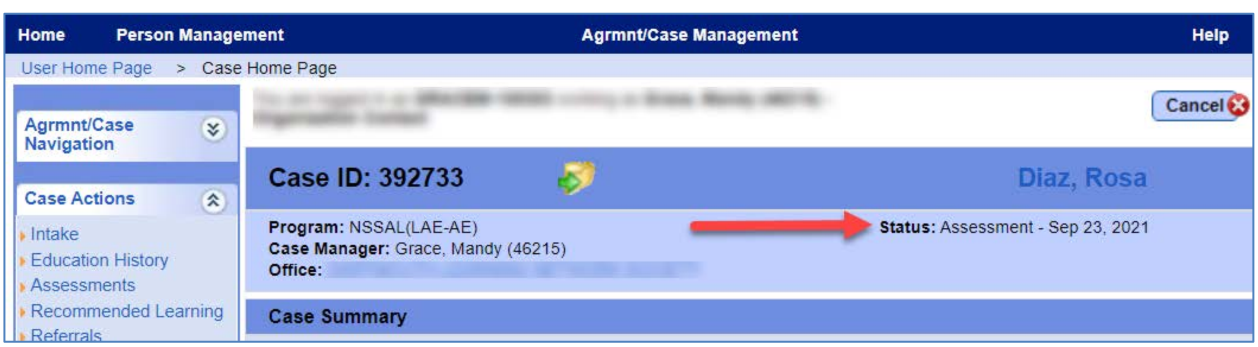



**Choose an Outcome of Completed and select Save.** You can also add additional Case Notes or Case Documents using the icons to the right of the Complete Intake task.

**If the task is saved successfully, you will be redirected to the Case Homepage**.

! *If a required step has not been completed, an error message will display at the top of the screen with further instructions.*

You will see in the Case Header that the status now shows Assessment.




A Complete Assessment task has also been created, which will later be used to move the case into the next status.

This Complete Assessment task will also display on the User Homepage of the assigned Case Manager as a reminder that there is work to be completed for this Adult Learner's case.

# 6 ASSESSMENT

## 6.1 Placement Assessments – COMMON PROCESS 3

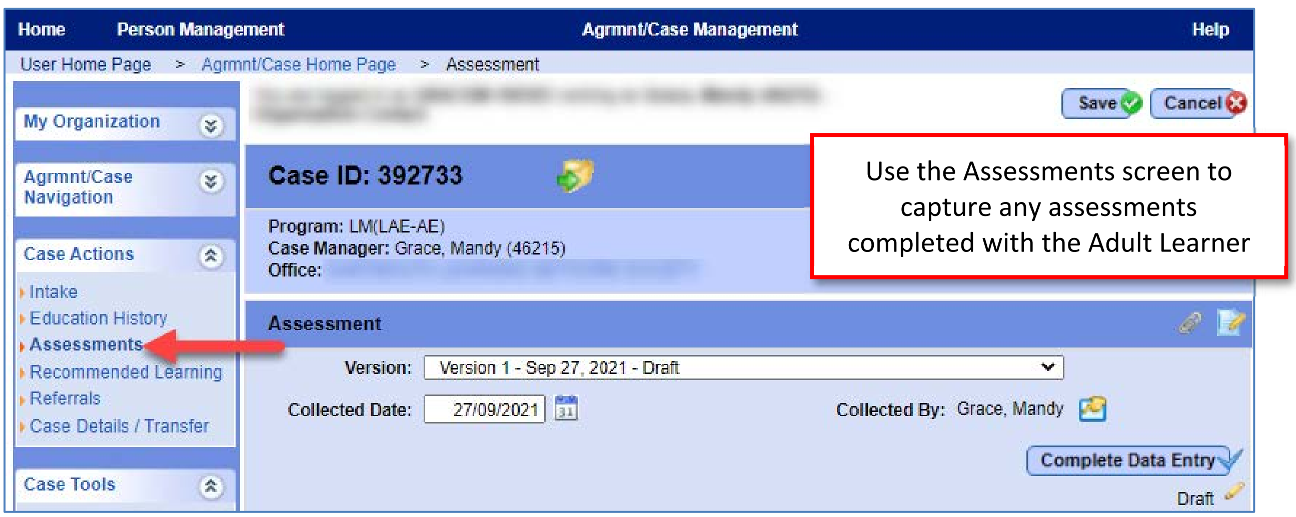
The placement assessment process is meant to provide the Adult Learner and the assessor with an overall picture of the Adult Learner's learning strategies and comprehension to help determine the Adult Learner's Recommended Learnings. The assessments take place outside of the system, then the results will be recorded in LaMPSS-LM.

## 6.2 Capture Assessment in LaMPSS – COMMON PROCESS 4

**The results of any placement assessments completed with the Adult Learner must be captured on the Assessments screen.** This is the next screen following Intake and Education History in the left navigation menu.

*LaMPSS will not require that you enter an assessment to progress with the Adult Learner's case, but if any assessments have been completed they must be captured in the system.*

More than one assessment can be added through the Assessments screen. After each assessment is entered and the Complete Data Entry button used to mark the version as complete, the Version dropdown will provide the option to create another assessment.



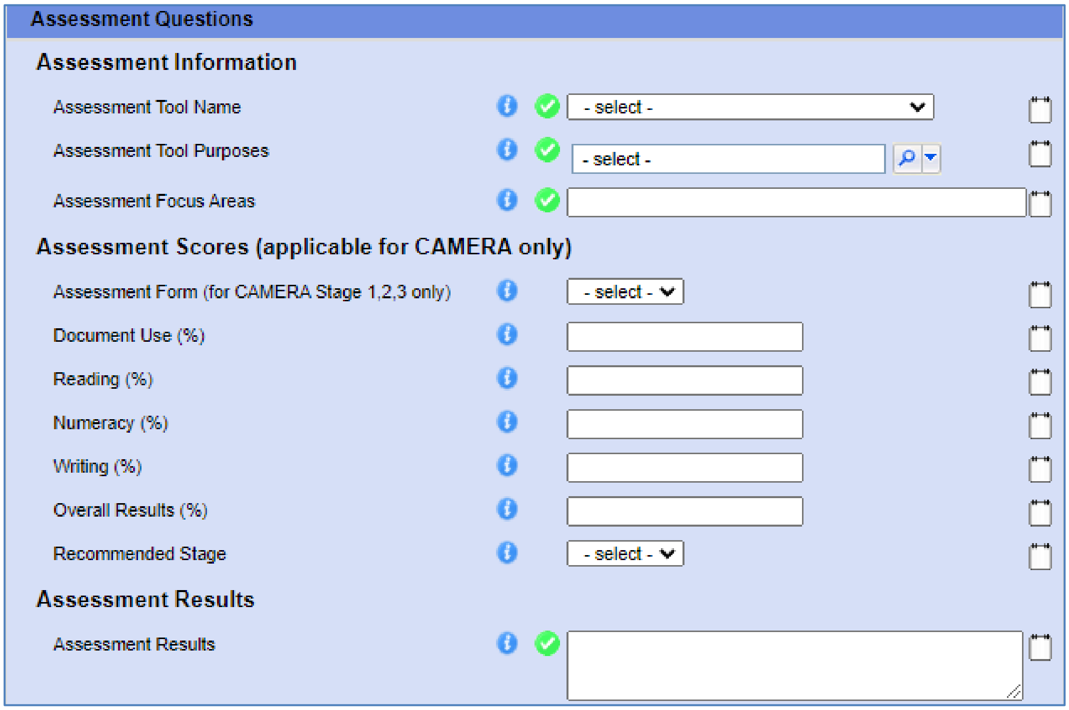

If the date the assessment was completed with the Adult Learner is not the date it is being entered in LaMPSS, use the Collected Date field to reflect the date of assessment.

Similarly, if the assessment was completed by another staff member of your organization, use the Collected By field and the staff popup icon to select the name of the person who completed the assessment with the Adult Learner.

Then, in the Assessment Questions section of the screen, use the fields available to capture the results of the assessment. **For all assessments you will need to enter the following:**

- **Assessment Tool Name**
- **Assessment Tool Purpose**
- **Assessment Focus Area**
- **Assessment Results**

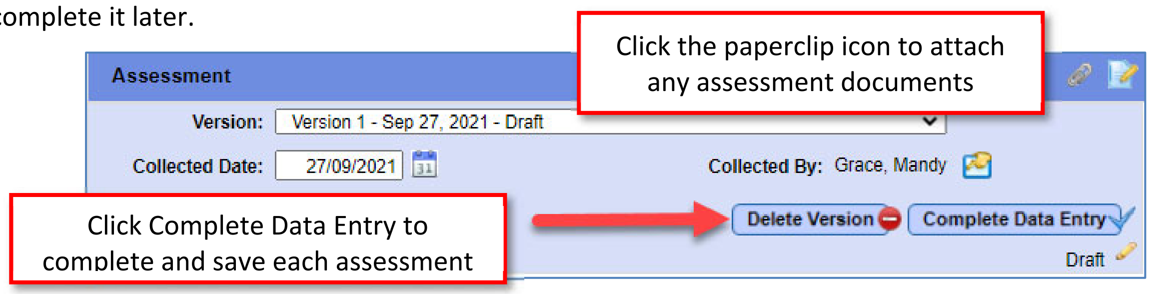
For CAMERA, there are additional fields to capture the assessment scores.



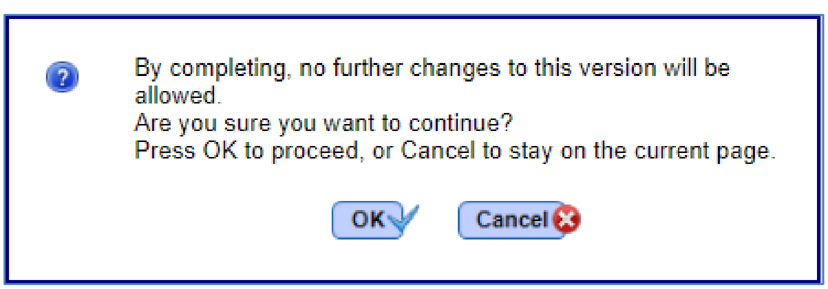

Like the Intake screen, the green checkmark will be used to indicate required fields while the blue information icon displays more detail on what the field is intending to capture. You can also use the notepad to the far right of each item to provide any notes or additional information.

Documents, such as a copy of any assessment documents, can be attached using the Case Documents icon (i.e., paperclip) in the Assessment header.

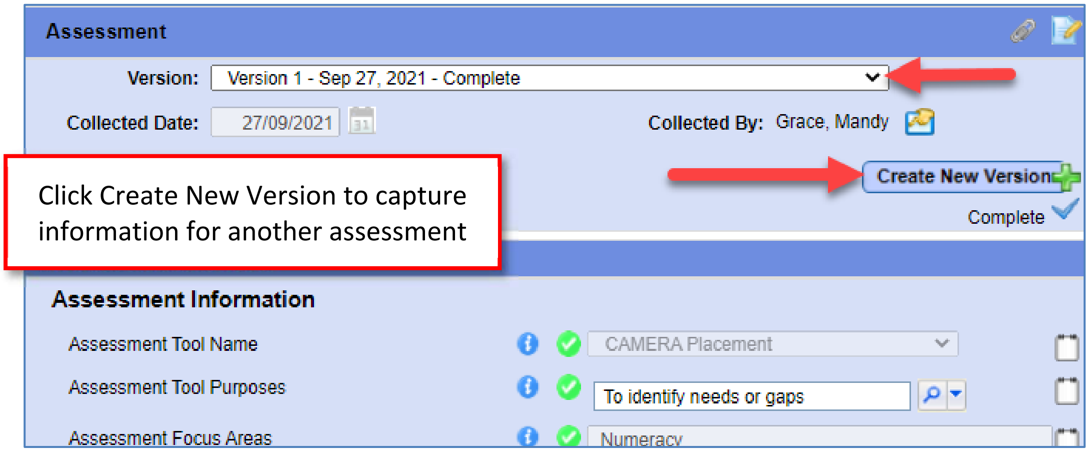
**Once the Assessment Questions are complete, use the Complete Data Entry button to complete and save this assessment.** If necessary, click the Save button to save a partially entered assessment and return to the screen to complete it later.




LaMPSS will display a warning message to confirm you want to proceed. **Click OK.**



**The saved version will display in the drop-down list with the Version # and completed date, while the Complete Data Entry button will change to a Create New Version button.**



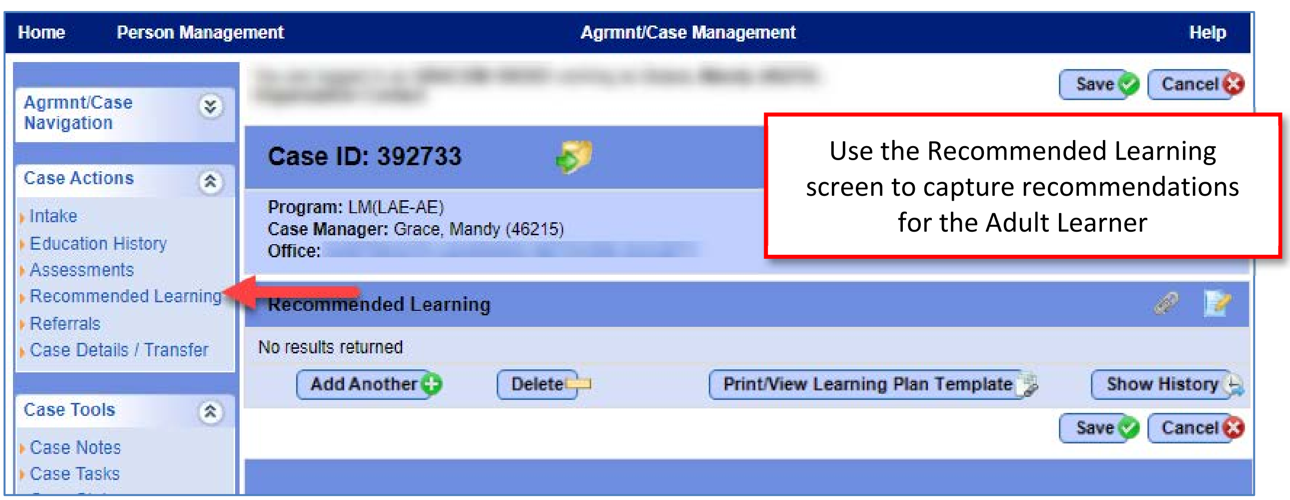

**Use the Create New Version button to capture the information for another assessment.** You can view existing assessments by selecting the version and reviewing the information in the Assessment Questions section of the screen.

## 6.3 Capture Recommended Learning in LaMPSS – COMMON PROCESS 5

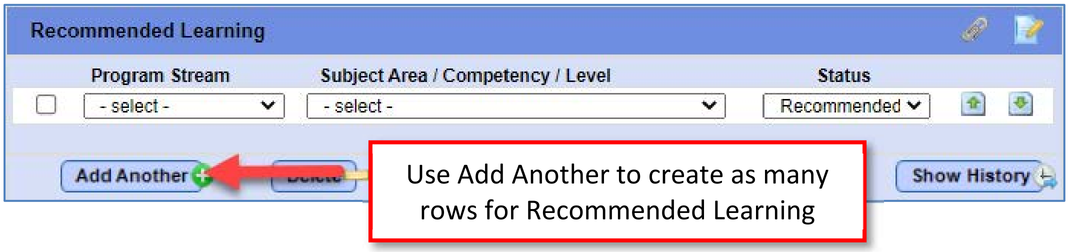
**Once the Adult Learner's intake information and any learner assessment results have been reviewed, the recommended learning for the Adult Learner should be captured in LaMPSS on the Recommended Learning screen.** This is the next screen following Assessments in the left navigation menu.

**You will enter the NSSAL program stream and the subject area/competencies.** The recommended learnings are intended to provide a guide towards the Adult Learner's goals and can change throughout their time within the NSSAL system.

**As recommended learnings are planned, completed, or not completed it can be captured in LaMPSS.**



**To begin adding content for the Adult Learner, click the Add Another button to create a blank row.** You can add as many rows as needed.



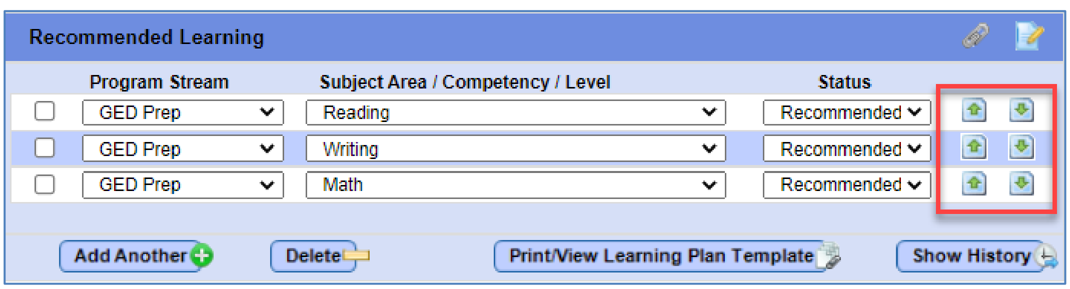

**For each row of Recommended Learning, you will use the drop-down lists to enter:**

- **Program Stream –** The area or path of focus for the recommended learning
- **Subject Area/Competency/Level –** The list of sub areas available for learning based on the selected Program Stream
- **Status -** The Adult Learner's status within the selected recommended learning

Once you select a Program Stream, the available options in the Subject Area/Competency/Level list will reflect only those relevant for that stream.

**The options for Status include Recommended, In Progress, Completed and Not Completed.** This field will be manually updated by the Case Manager as the Adult Learner engages in and completes (or does not complete) each recommended learning.

**If there are multiple recommended learnings for the Adult Learner, they can be ordered in the most efficient sequence using the up and down arrow icons to the far right of each row.**



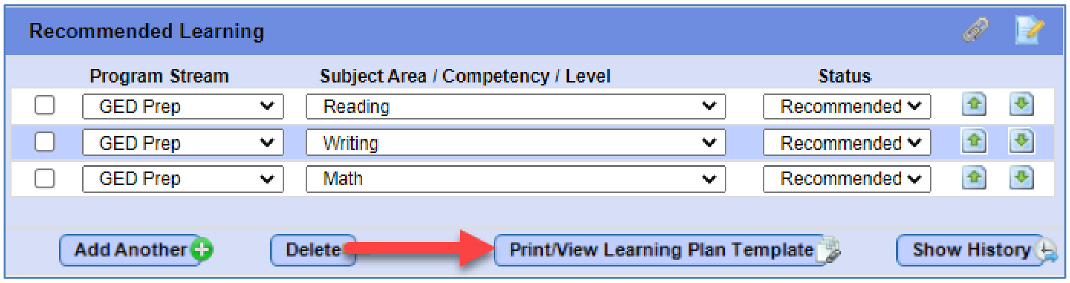

The Show History button will update the list to also display any Completed or Not Completed items.

To delete a row entered in error, check the box to the left of the row and then the Delete button. Only rows in Recommended status can be deleted. If the status is In Progress, it can be changed back to Recommended status and then deleted.

## Learning Plan Report

**The Print/View Learning Plan Template button opens a printable version of a pre-populated Learning Plan Template based on information provided on this and other Learner Management screens in LaMPSS.** The Learning Plan will launch as a Word document to allow Instructor Notes to be added and saved.

**Click Print/View Learning Plan Template to launch the template in a new window.**

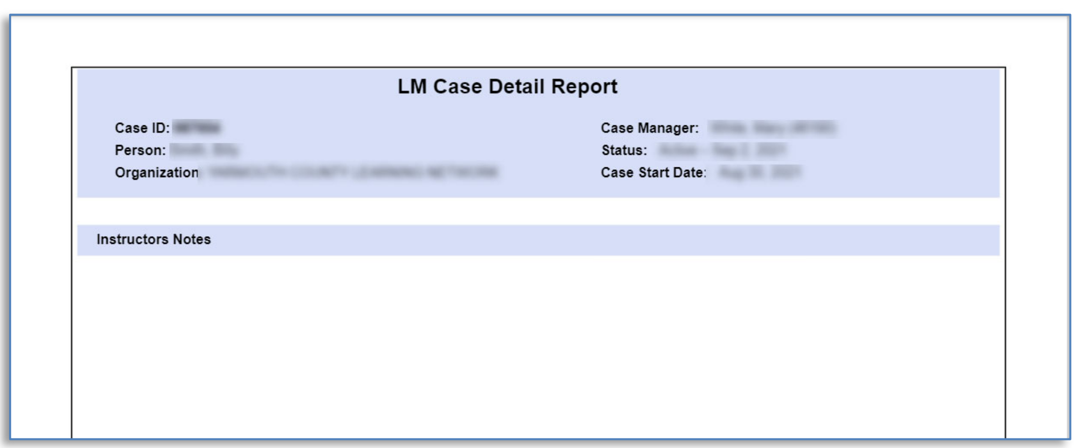



**The Learning Plan Template will include the following sections:**

- **Person Details**
  - **Contact Information**
  - **Alias**
- **Intake Details**
- **Education/Training**
- **Assessment Log**
- **Recommended Learning**
- **Instructor Note**

Each section will have information pulled from the related LaMPSS screens. To change information on the Learning Plan, you will need to change the information as it appears in LaMPSS and then re-generate the Learning Plan Template.

**The final section, the Instructor Note, is a blank page that can be used to add notes to the Learning Plan before it is saved, shared, or printed.**



Once the Learning Plan has been reviewed and any desired notes added, it can be saved in various formats, emailed, or printed.

## 6.4 Refer Learner – COMMON PROCESS 6

Once Recommended Learnings are identified and have been captured in LaMPSS, you *may* need to complete a referral to refer the Adult Learner to another organization that offers the programs needed to achieve their learning goals or you will register the Adult Learner in any services (programs) offered by your organization (see Register Adult Learner in Service Registration).

This section of the guide will cover how to complete a referral using LaMPSS – which may or may not involve a Case Transfer.

*For full details on how to use Service Registration refer to the User Guide developed by the Adult Education Division on LaMPSS Service Registration for NSSAL Service Providers.*

### Referrals Screen

There are three types of referrals you may capture within LaMPSS on the Referrals screen, which is the next screen following Recommended Learning in the left navigation menu.

#### Case Transfer

- This type of referral can be used when your organization plans to transfer the Adult Learner to another NSSAL provider.
- It will generate an informational email to advise the new provider that the Adult Learner plans to transfer. They will be able to view the Adult Learner's person record and a summary of the Learner Management case.
- A Case Transfer will still need to be entered using the Case Details/Transfer screen. Once the transfer is complete, the case will be assigned to the new organization instead of your organization and you can no longer update the case.

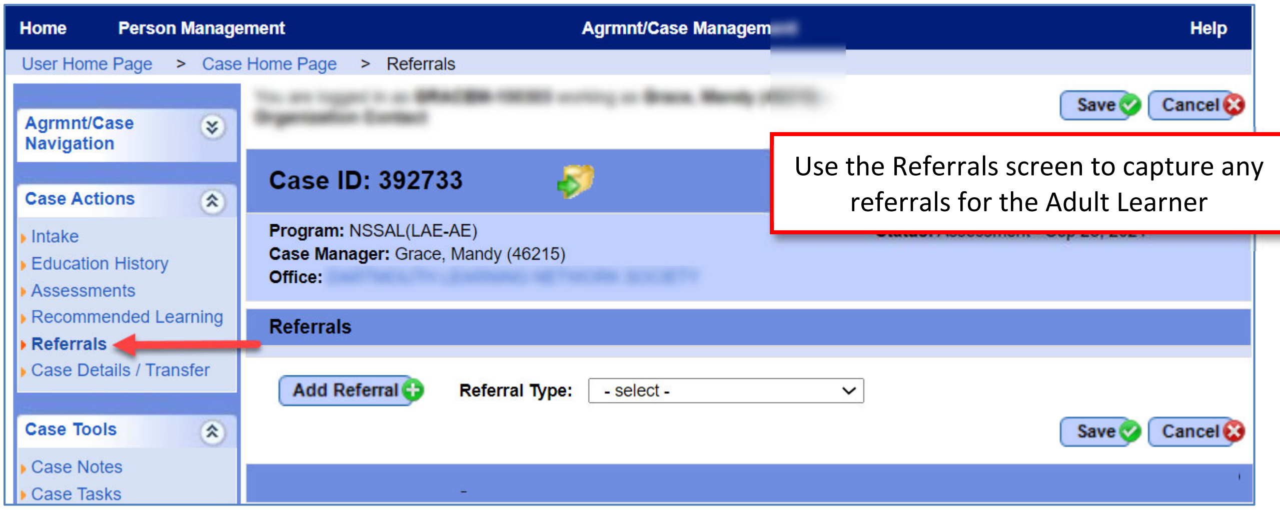
#### Informational (within NSSAL)

- Used when referring the Adult Learner for services at another NSSAL provider, but where your organization continues to manage the Adult Learner's case.

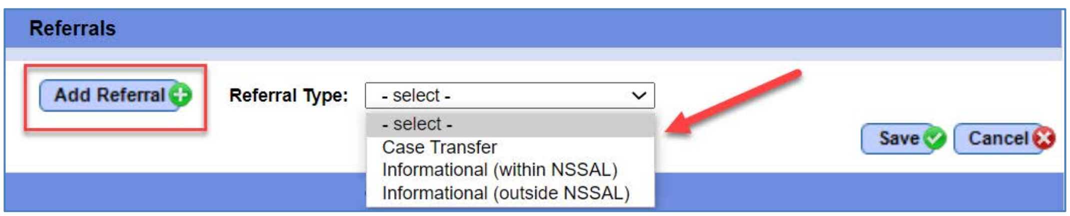
#### Informational (outside NSSAL)

- Used when referring the Adult Learner for services at an organization outside of NSSAL and your organization continues to manage the Adult Learner's case.
- If the Adult Learner is being referred outside of NSSAL and is not planning to return soon the case could be closed once this referral is entered.

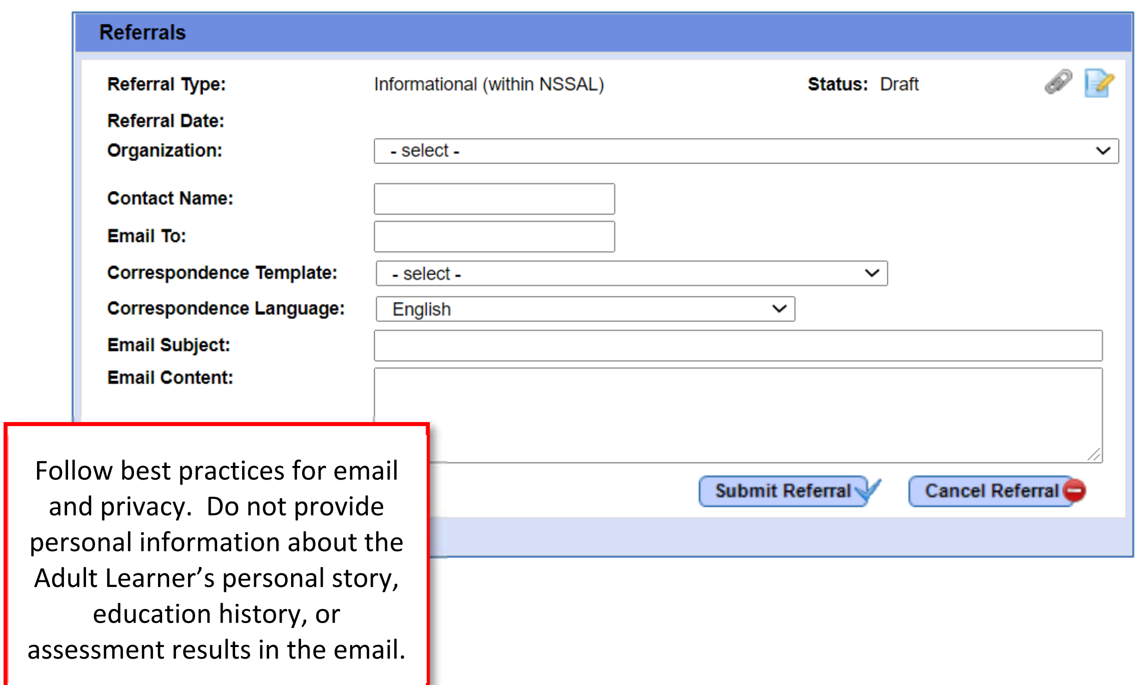
**On initial load, the Referrals screen will appear with no information.** As referrals are added, they will be listed.




**Select the Referral Type from the drop-down list then click Add Referral.**




**A new set of fields will appear**. Depending on the type of referral, different values are available to select for some of the fields.



**For each referral you will provide:**

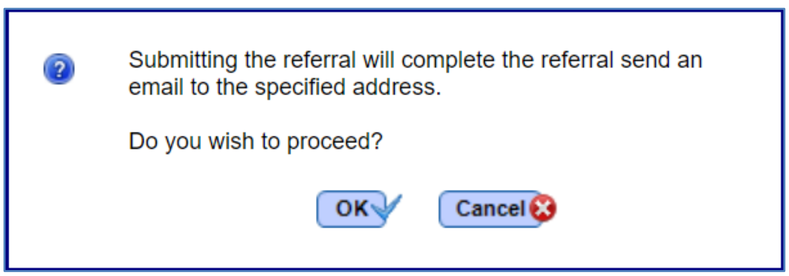
- **Organization –** The organization that will receive the referral. For Case Transfers or Informational (within NSSAL) referrals this will be a drop-down list. Only organizations with an active NSSAL agreement will be displayed.
- **Contact Name –** The contact's name at the receiving organization.
- **Email To –** The email address of the contact. When an organization is selected from the drop-down list this will default to the organization email.
- **Correspondence Template –** The template the system will use and add as an attachment to the referral email. Once a template is selected, you will see a Preview button to display the template in a popup window.
- **Correspondence Language –** The language to use for the correspondence template.

*If you plan to select French, select the Correspondence Language first (i.e., before anything else) as changing the language will overwrite any edits already made.*

- **Email Subject –** The subject line for the referral email being sent. The subject line is defaulted based on the correspondence template but can be edited.
- **Email Content –** The email body for the referral email being sent. The content is defaulted based on the correspondence template but can be edited.

Any relevant notes or documents can also be added to the referral using the icons near the top of the screen.

**Once all the referral details are entered, click Submit Referral.** A warning message will ask you to confirm you want to submit the version. **Click OK to complete the referral.**

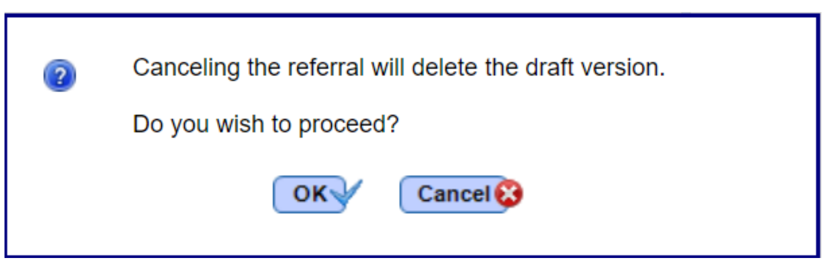



**Once you select OK, LaMPSS will also process the Referral Correspondence for this referral, sending the letter as an email attachment to the specified contact.**

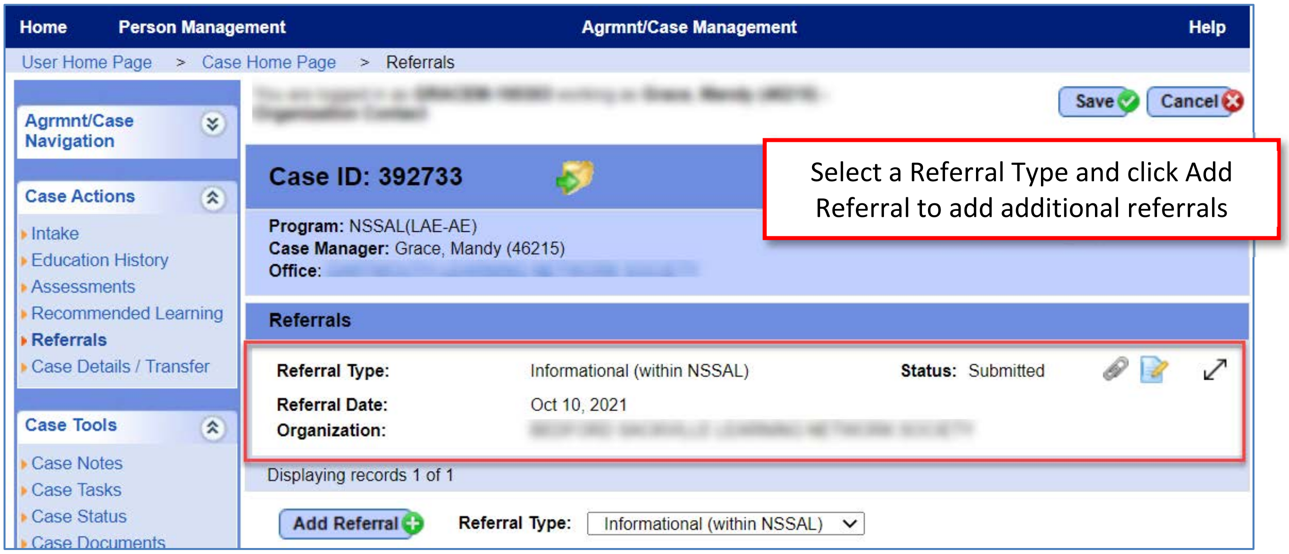
*None of the Referral fields can be updated once submitted.*

**If at any point before submitting you want to cancel the referral, select the Cancel Referral button.** A warning message will ask you to confirm you want to delete the draft version.

Click OK to complete the cancel.

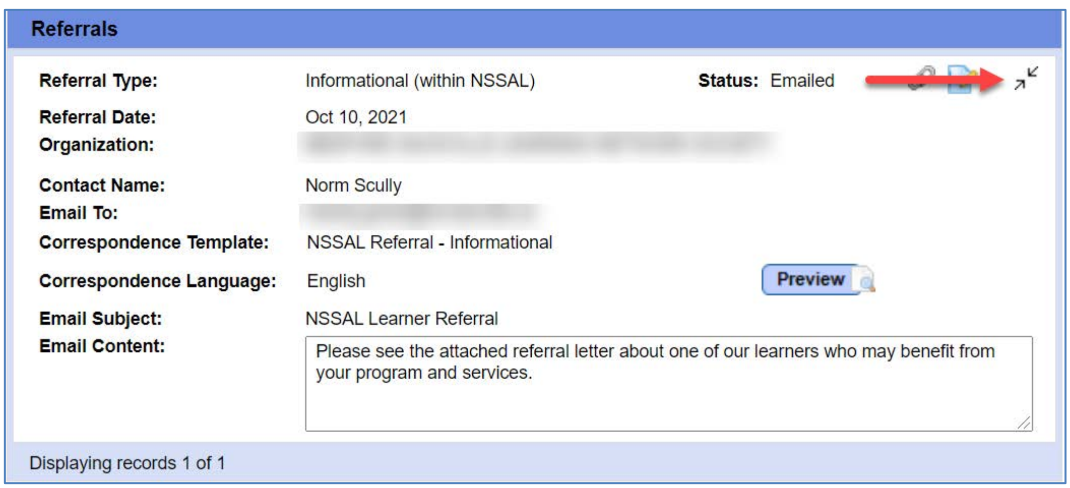



**Once submitted, the new information is listed on the Referrals screen.** The Add Referral button will continue to be available for future referrals that may be required.




The referral information includes a Status field. Initially the status will be Submitted, then change to Emailed when the system processes the correspondence and generates the email. This will typically occur within approximately 15 minutes of saving the referral.

**The double-sided arrow icon in the row for the referral can be used to expand the view to include all the referral information and clicked again to condense the view.**



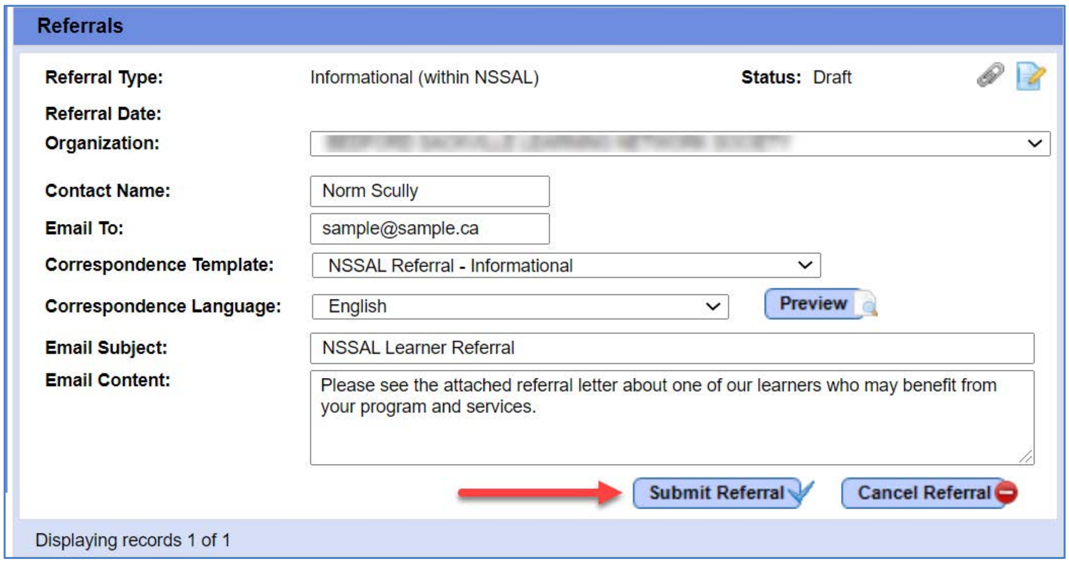

The next sections of this guide look at each Referral Type in more detail, as well as the system-generated referral correspondence.

## Referral to Another NSSAL Provider Using LaMPSS LM

**This type of referral is used when referring the Adult Learner for services at another NSSAL provider, but where your organization continues to manage the Adult Learner's case.**

*To transfer the Adult Learner to another NSSAL provider, complete a Case Transfer instead.*

**The Organization drop-down list will default to a list of organizations with active NSSAL agreements.** You will select the desired provider from the list. This will automatically populate the Email To field with the provider's email address from LaMPSS.




*The list of NSSAL providers is generated based on the provider's legal name used in LaMPSS. In some cases, this may not be the same name by which they are known in the community. Your Adult Education Coordinator can assist if you are unsure which organization to select.*

**Once you've selected an organization, ensure you also select the Correspondence Template for "NSSAL Referral – Informational".** This template includes the appropriate information and wording for this type of referral. You can customize the Email Subject and Email Content using the text boxes provided.

*Avoid including any personal information or sensitive details in the Email Subject or Content*

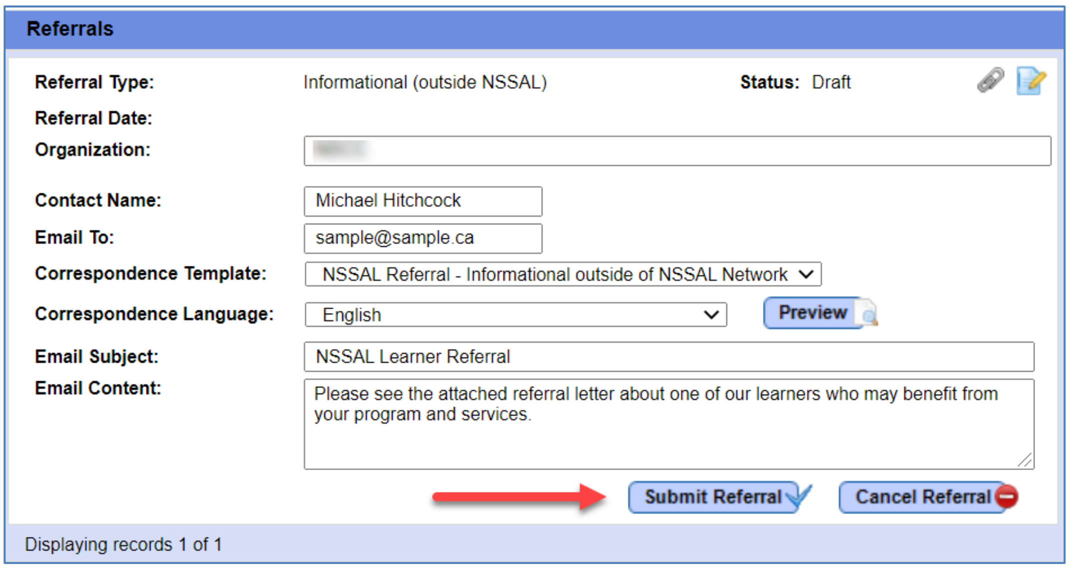
*All client information collected as an agreement holder on behalf of the Province must be treated as confidential, and you must take all security measures reasonably necessary for the protection against unauthorized access, use, release, or disclosure (e.g., secure access, storage, and disposal). Email is not always a secure way to send and receive information. Therefore, when editing the Email Subject or Email Content fields of a referral, you need to ensure the information you provide respects the privacy of the individual and not provide personal information about the Adult Learner's personal story, education history, or assessment results. The referral process in LaMPSS is designed to notify the organization about the referral and then you need to contact the organization to ensure they are aware of the referral and to discuss and clarify applicable details about the Adult Learner.*

## Referral to An Organization Outside of LaMPSS LM

**This type of referral is used when referring the Adult Learner for services at an organization outside of LaMPSS-LM. Your organization may continue to manage the Adult Learner's case or if the Adult Learner is not planning to return soon the case could be closed once this referral is entered.**

*It will be important to enter and save the referral before closing the case. Once a case is closed no additional information, including referrals, can be entered.*

**The Organization field is free text for you to enter the name of the organization (e.g., government agency, community service provider) where you will refer the Adult Learner.**




**Once you've entered an organization, ensure you also select the Correspondence Template for "NSSAL Referral – Informational outside of NSSAL Network".** This template includes the appropriate information and wording for this type of referral. You can customize the Email Subject and Email Content using the text boxes provided.

*Avoid including any personal information or sensitive details in the Email Subject.*

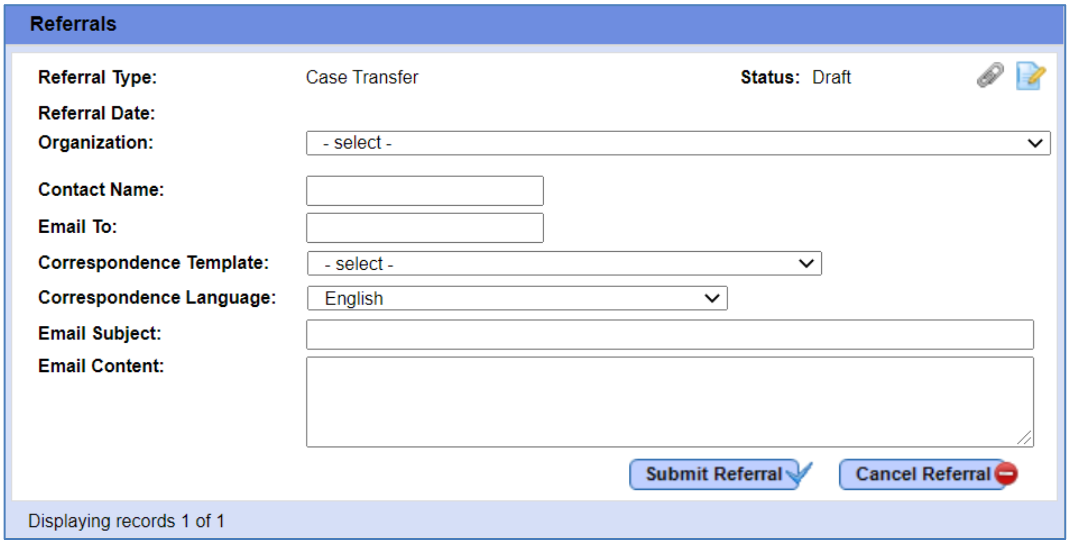
## Case Transfer

**This type of referral can be used when your organization plans to transfer the Adult Learner to another NSSAL provider.** It will generate an informational email to advise the new provider that the Adult Learner plans to transfer. That organization will be able to view the Adult Learner's person record and a summary of the Learner Management case.

A Case Transfer will still need to be entered by the receiving organization using the Case Details/Transfer screen. Once the transfer is complete, the case will be assigned to the new organization instead of your organization and you can no longer view or update the case.

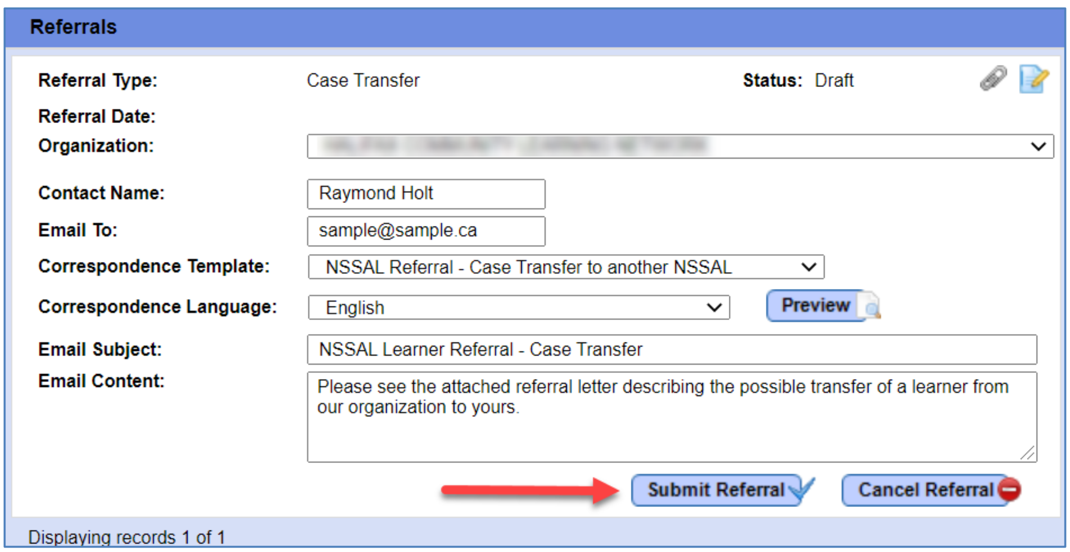
This could happen at various stages of the Adult Learner's case, including during Intake, Assessment or Active.

**On the Referrals screen, select a Referral Type of Case Transfer.**

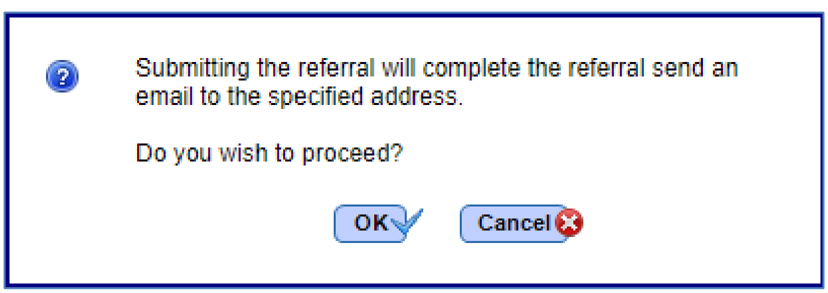



**Fill out the referral information, selecting the receiving NSSAL provider from the drop-down list of organizations.** This will automatically populate the Email To field with the provider's email address from LaMPSS.

**Once all information has been entered, click Submit Referral.**



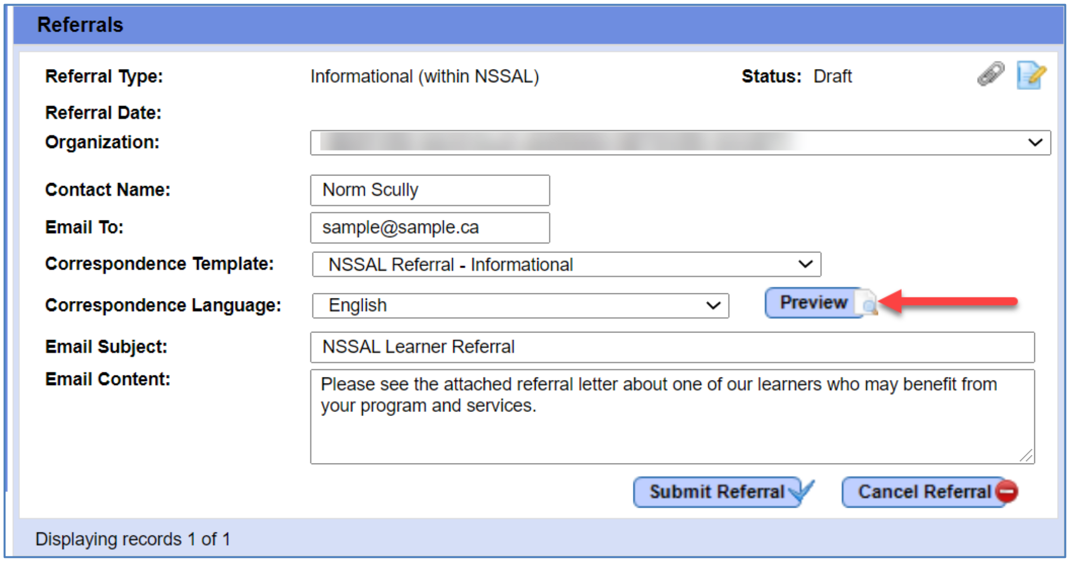

A warning message will ask you to confirm you want to submit the version. **Click OK to complete your part of the transfer.**



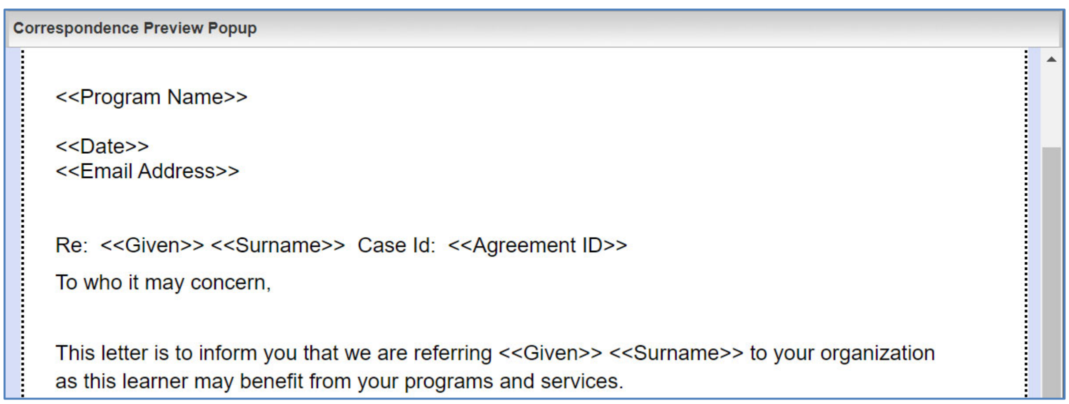
Along with the transfer in the system, a soft handoff should be completed by contacting the receiving organization to ensure they are aware of the referral. This is an opportunity to discuss and clarify details about the Adult Learner.

## Referral Correspondence

**For all Referral Types, once you select the Correspondence Template you can use the Preview button to see a print preview of the correspondence that will be attached to the email.**




**The Preview will launch in a Correspondence Preview Popup window.**

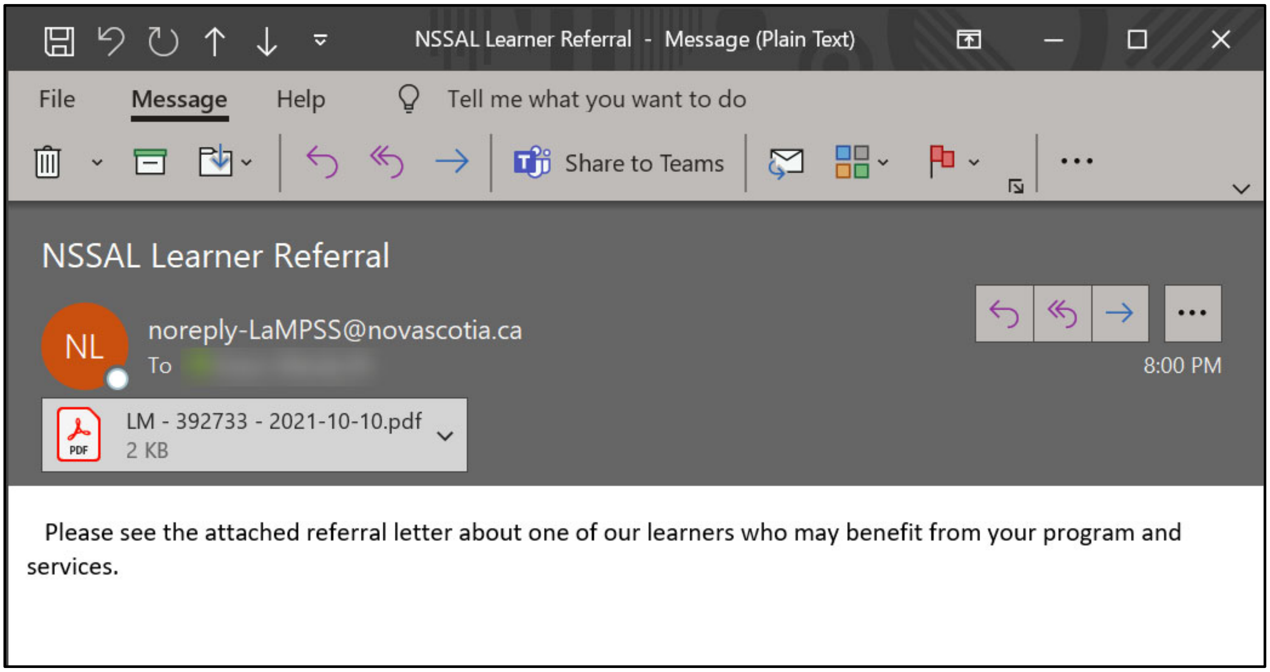



The letter for each Referral Type is based on a template setup in LaMPSS by the Adult Education Division.

! *If you believe changes are needed to the template, contact your Adult Education Coordinator.*

**The email below is a sample of how the referral will look when received.**

The Email Subject and Email Content will include the information that was input on the Referrals screen, with the letter attached as a PDF document.



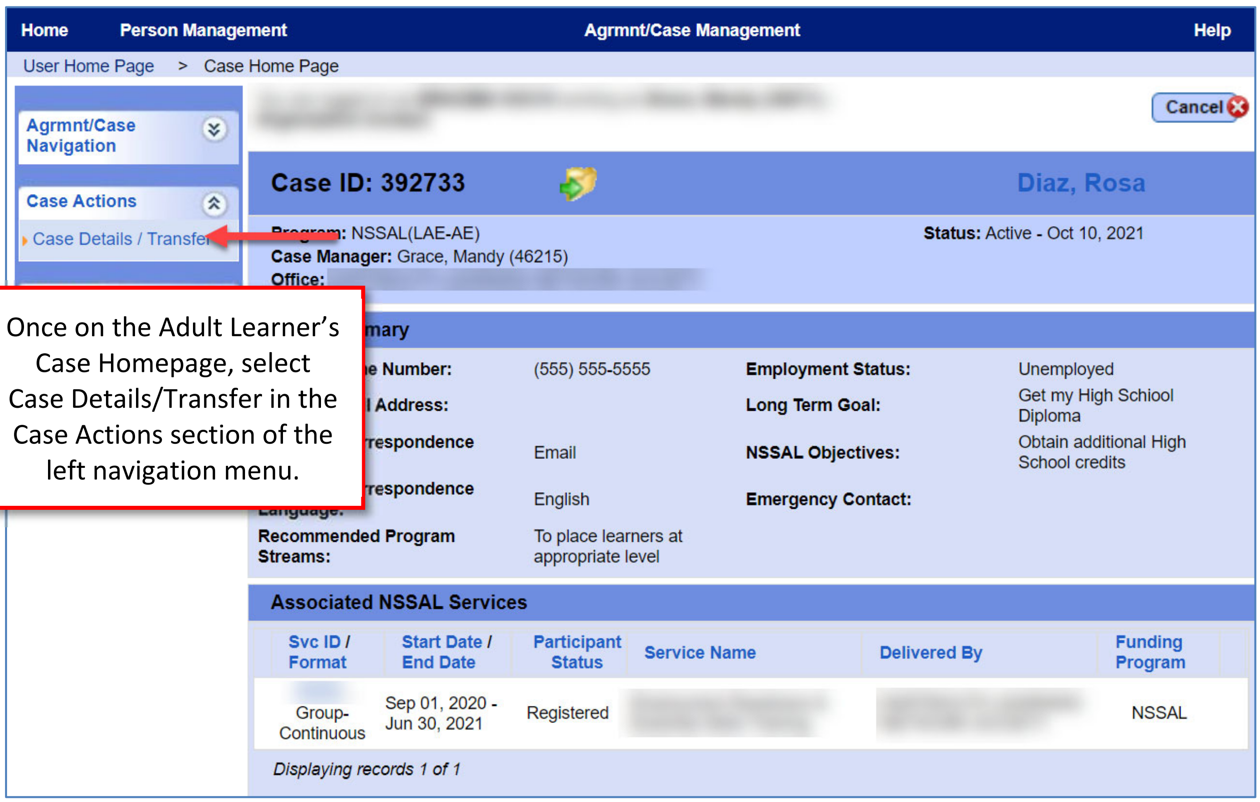

The email is generated from a no-reply address, but the letter includes contact information for your organization. It may take up to 15 minutes for the emailed referral to be sent by LaMPSS.

## 6.5 Transferring a Case from Another NSSAL Provider

Case Transfer is used to transfer the Adult Learner from one NSSAL provider to another. Once the transfer is complete, the case will be assigned to the new organization. The Adult Learner may be referred back to the first organization for service participation, but the case becomes managed by the new organization.

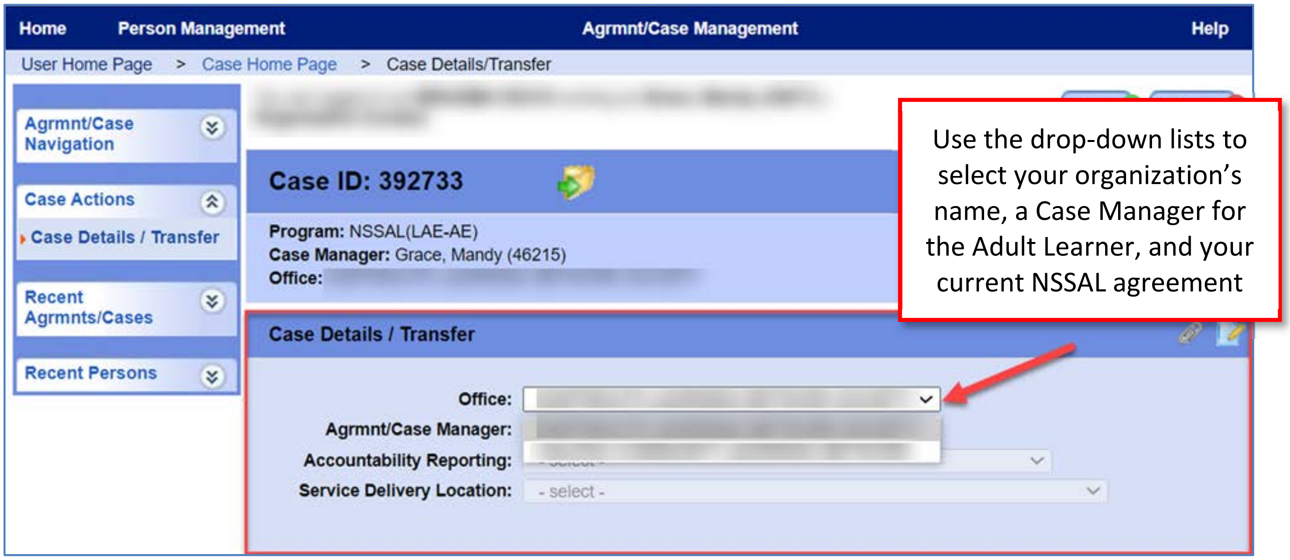
If an Adult Learner is already working with a NSSAL provider and expresses an interested in transferring to your organization, you *may* receive a referral email at the email address recorded in LaMPSS for your organization. The referral email is not mandatory. Case Transfers are already done by the "receiving" organization once the learner engages with them. The Case Transfer referral is just a way to notify the new organization that the learner may engage with them. A case can be transferred whether or not a referral email is received by following the steps outlined below.

**Using the name of the Adult Learner or the Case ID from the referral email, use Person Management or Agrmnt/Case Management in the top navigation menu to search for the LM Case.**




The Case Summary on the Case Homepage will provide an overview of the Adult Learner's current situation and service participation.

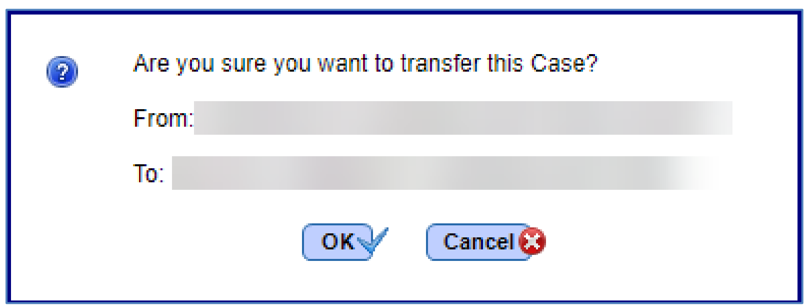
**To complete a transfer and move the Adult Learner into your organization's caseload, select Case Details/Transfer in the Case Actions section of the left navigation menu.**




**On the Case Details/Transfer screen, use the Office drop-down list to select your organization's name. You will also need to select:**

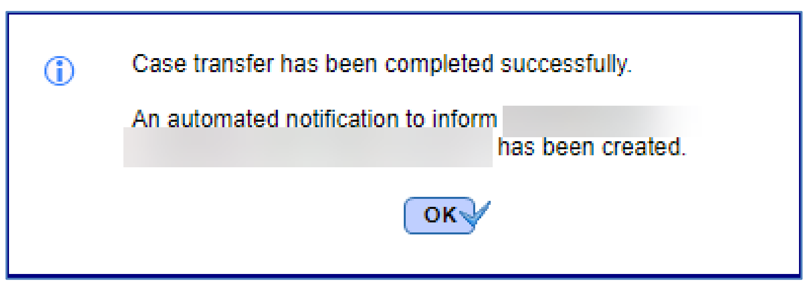
- **Agrmnt/Case Manager** – the name of the staff person who will be the LM Manager for this Adult Learner.
- **Accountability Reporting** – the active NSSAL agreement for your organization.
- **Service Delivery Location** – the location where the Adult Learner will receive service if your organization has multiple locations.

**When this information is complete, click Save**. A warning message will ask you to confirm you want to complete the transfer.



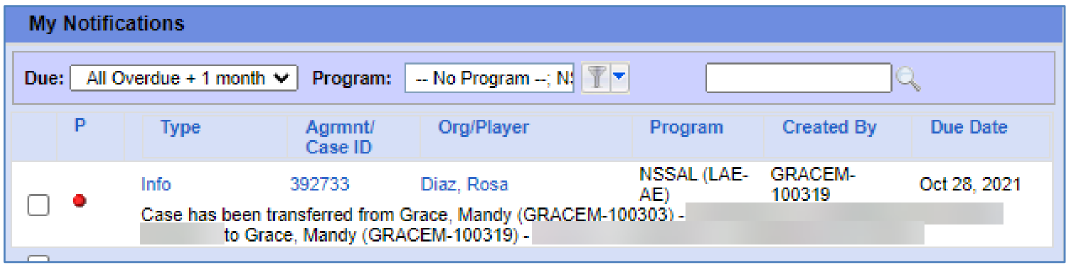

**Click OK.** A popup message will confirm the transfer has been completed successfully.

The LM Case will be assigned to the selected staff person.



LaMPSS will communicate this to the appropriate staff in both organizations:

- A system-generated task of "Received Transferred Case/Agreement" will automatically be created and assigned to that user in LaMPSS. This task will appear on both their User Homepage and the Case Homepage to make them aware they have received the case for an Adult Learner. This will be important if the case has been assigned to someone other than the user who completed the transfer.
- An automatic notification will be sent to the Adult Learner's Case Manager with the previous organization to inform them the transfer has occurred.




## 6.6 Register Adult Learner in Service Registration (COMMON PROCESS 6)

Service Registration is the term used in LaMPSS for the set of functions to help your organization manage the services delivered under your NSSAL agreement with the Adult Education Division.

It includes the ability to register Adult Learners, indicate what services they receive, capture key outcome information, and generate reports to help manage those services.

Once registered in services, both the Person Homepage and the Case Homepage for the Adult Learner will display a quick view of the services the person is participating in.

This section of the guide will cover changes to how Service Registration works for Adult Learners with a LaMPSS Case. A series of guides are available on the LaMPSS website with full training on how to use Service Registration functionality. They are available at: https://novascotia.ca/lae/lampss/lampss.asp and topics include:

- Service Registration Overview
- How to Access Service Registration
- How to Create and Maintain Services
- How to Register and Manage Participants
- How to Remove a Participant
- How to Update or Complete a Participant
- Service Registration Reports

You can also use the *LaMPSS Service Registration for NSSAL Providers* user guide, available from the Adult Education Division, for instructions that are specific for the NSSAL program.

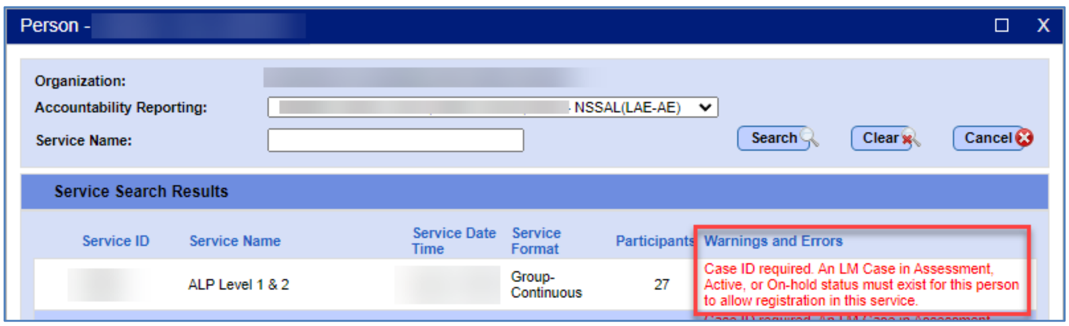
## LaMPSS Learner Management Case and Service Participation

When an Adult Learner with your organization has a Learner Management Case in Assessment, Active or On-hold status, that person can then be registered in services as part of their Recommended Learnings. To capture that service participation and the immediate outcomes of their participation in the service, you will register the person using Service Registration.

*The Adult Learner may participate in services offered by other providers. Those providers would also complete Service Registration information for the person.*

Prior to the implementation of LaMPSS Learner Management, an Adult Learner could be registered for a service offered through NSSAL funding if they had a LaMPSS Person ID, and the Social Insurance Number was provided in LaMPSS.

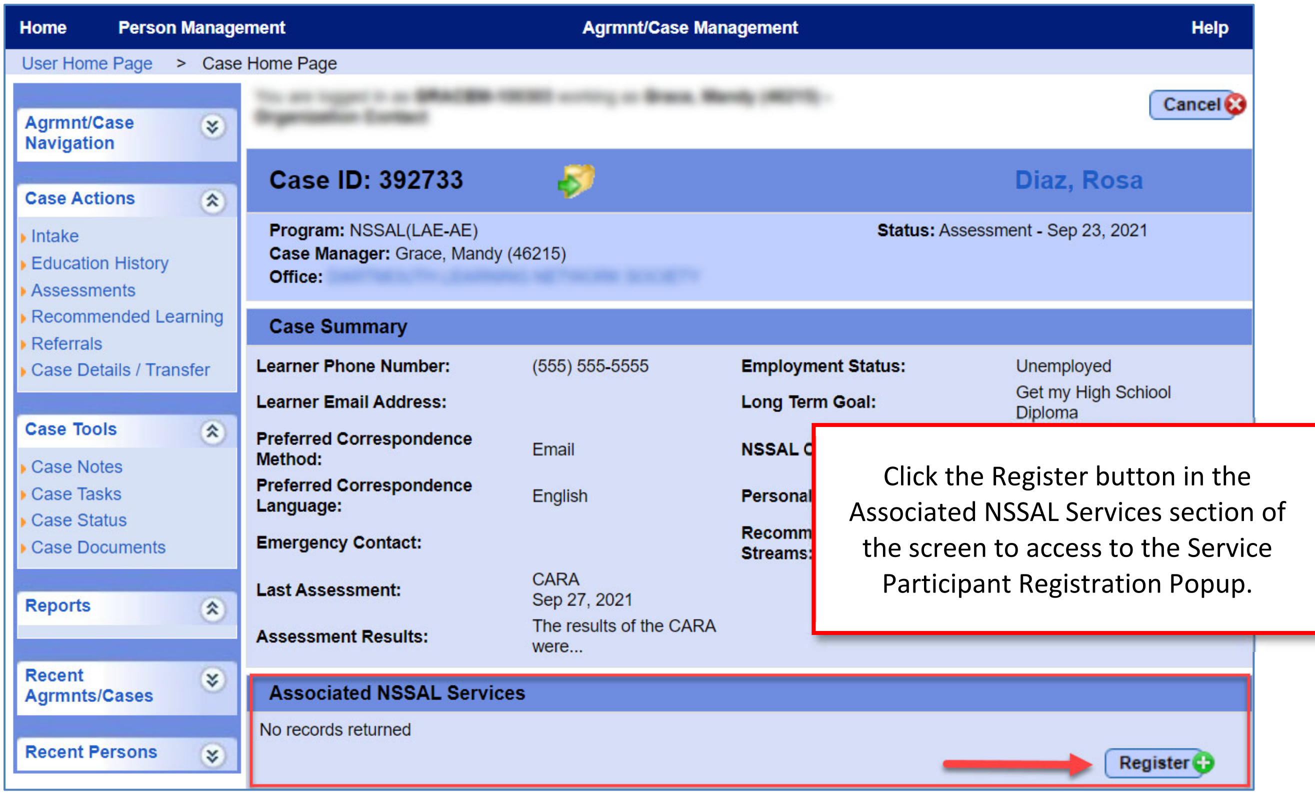
**Moving forward from November 2021, to be registered in a service funded through NSSAL the Adult Learner will need to have a LM case. LaMPSS will generate an error message if a case does not exist.** The LM case can be with your organization or another NSSAL provider.



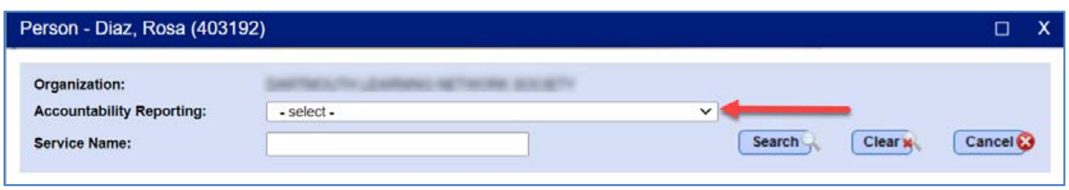

*The exception to the case registration requirement is for services offered through NSSAL providers who do not use LaMPSS-LM. For services offered by those organizations an override has been created in LaMPSS so they can continue to use Service Registration for Adult Learners without a case.*

## Register from the Case Homepage

You can register the Adult Learner in services from the Case Homepage.



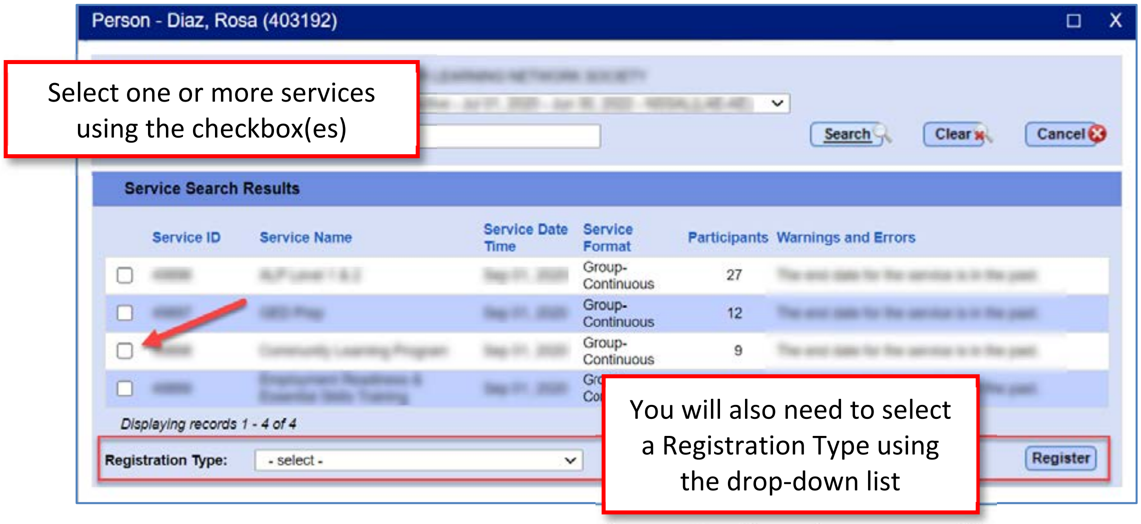

**In the popup, select your current NSSAL agreement from the Accountability Reporting drop-down list.**




**You can also enter text in the Service Name field to refine the search for only services containing that text.** To view all services associated with the agreement, leave the Service Name blank.

**Click Search.**

**The popup will expand to display any services that match your search**. Key information about the service will be displayed to help you determine the correct selection(s).




*If no services are found, you may want to verify the services have been created by your organization. Steps on how to navigate to and search for services are available in the online Service Registration training guides at* [*https://novascotia.ca/lae/lampss/lampss.asp*](https://novascotia.ca/lae/lampss/lampss.asp)

Depending on the requirements of the service and the information available for the Adult Learner in LaMPSS, there are several warnings and error messages you may see displayed in the popup, depending on the situation. Details about these errors are also available in the online Service Registration training guides linked above.

**Click the checkbox beside the service(s) you want the Adult Learner to be registered for. You will also need to select a Registration Type using the drop-down list at the bottom of the popup.** If Register and Copy Available Information is selected, when the Adult Learner is added to the service any available intake information will be copied from either the Intake Details on the case or the most recent Service Registration under NSSAL – whichever is newest.

**Once both a Service and a Registration Type are selected, click Register.**

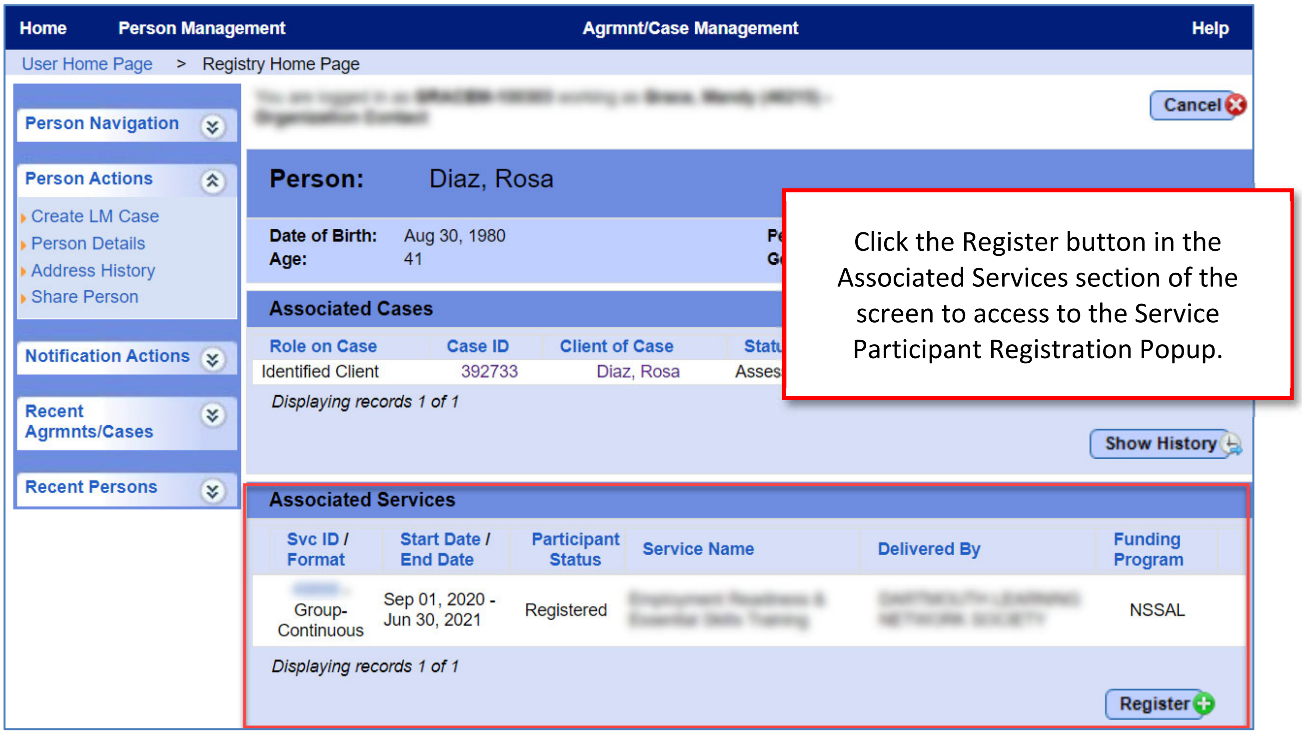
**A confirmation message will appear when the Adult Learner is successfully added.** Click OK to return to the Case Homepage.


You will now see the newly registered services in the Associated NSSAL Services section.

## Register from the Person Homepage

You can also register the Adult Learner in services from the Person Homepage.

Follow the steps outlined on the previous pages to search for a NSSAL service and register the Adult Learner.

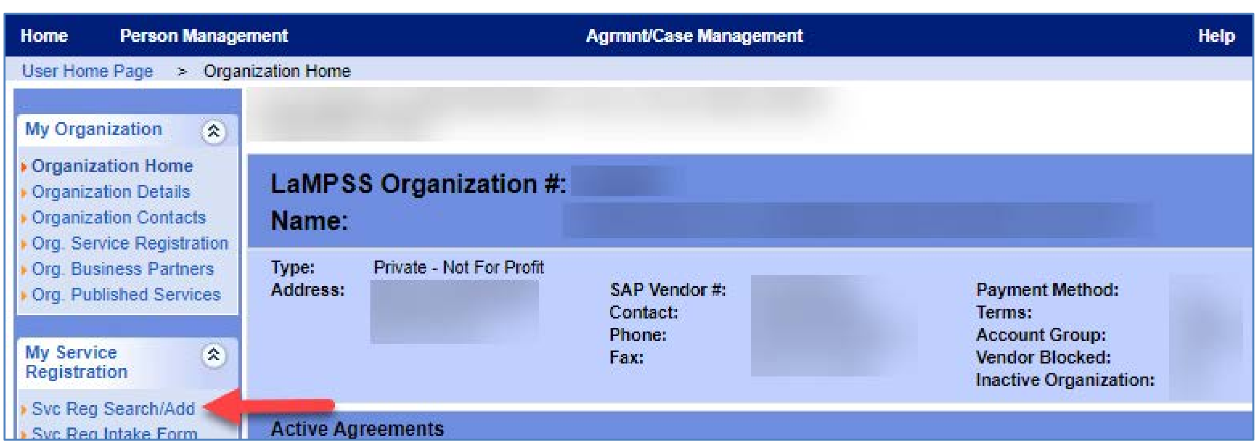



## Update Participant Status and Additional Information

Once the Adult Learner is registered in the service, you should update their status, start and end dates, and provide any additional information that is required for the service.

**To navigate to the Service Participant screen, you can click on the hyperlinked Service ID on either the Case Homepage or the Person Homepage.**

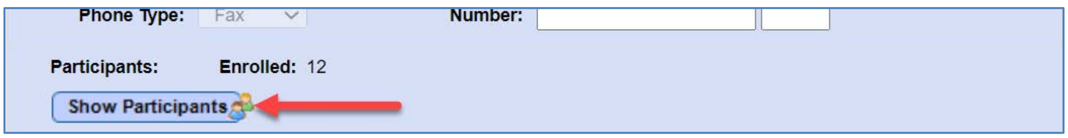
*You could also navigate directly to Org. Service Registration from your Organization Homepage.*




Search for the desired Service and click the Show Participants icon to access the Service Participants screen.

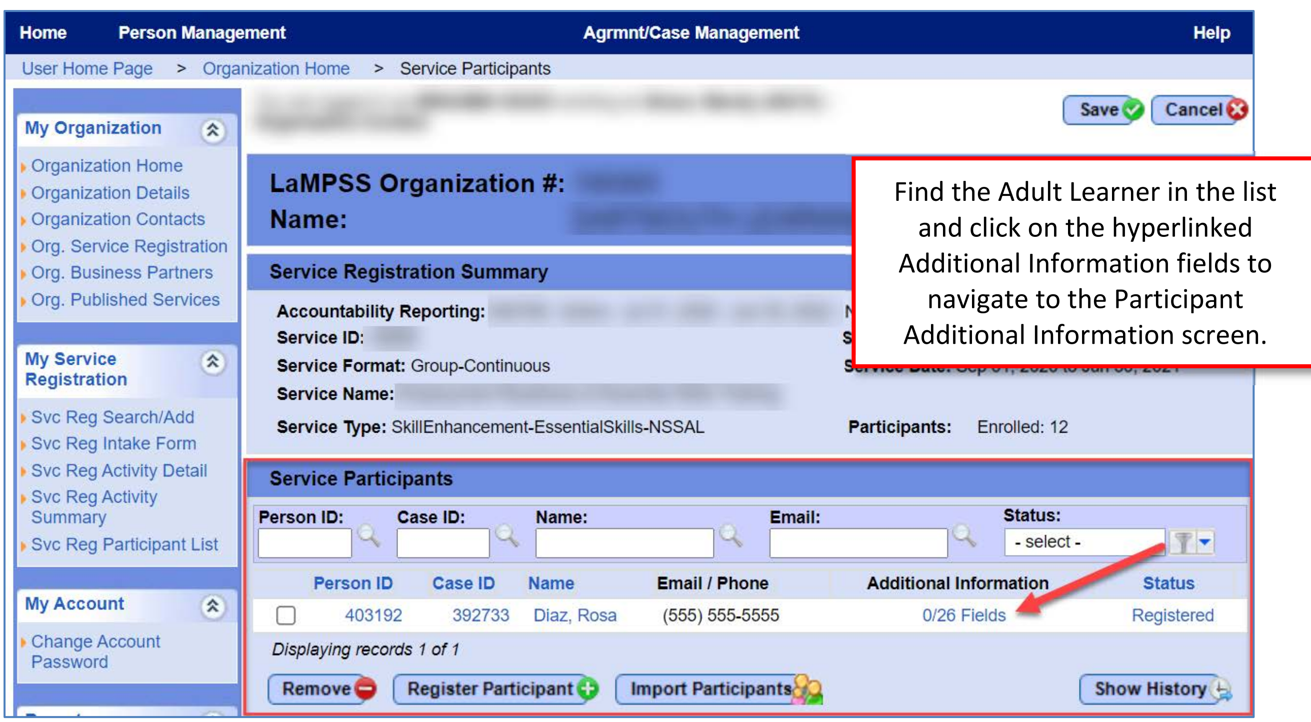
**If you click on the hyperlinked Service ID on the Person or Case Homepage, you will be redirected to the Service Registration Details screen with an overview of the service information.**


**Scroll to the bottom of the screen and click on the Show Participants button.**




There are two main sections of the Service Participants screen:

- **Service Registration Summary –** This section displays a summary of the service currently being viewed.
- **Service Participants –** This section will pre-populate with any existing (active) participants in the service and includes buttons to Delete a service, Register Participant, and Import Participants.

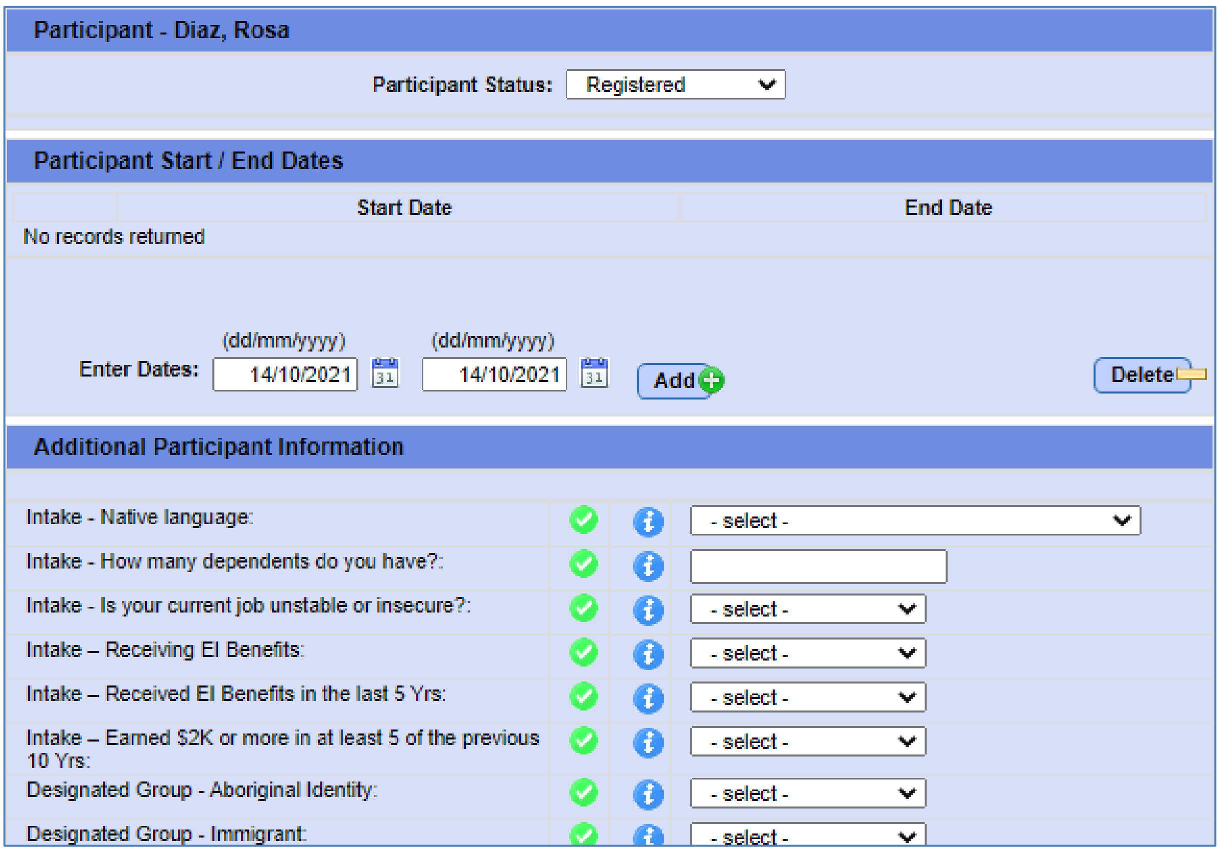



The Show History button can be selected to display participants in other statuses (e.g., Completed)

**Find the Adult Learner in the list and click on the hyperlinked Additional Information fields (or the hyperlinked Status) to navigate to the Participant Additional Information screen.**

The screen has three main sections:

- **Participant –** The top section displays the name of the participant currently being viewed and a Participant Status dropdown to indicate the Adult Learner's status
- **Participant Start/End Dates –**The middle section provides the ability to capture Participant Start and End Date.
- **Additional Participant Information –** The final section will list the additional information elements required for NSSAL. For each information element there will be a short description, a tool tip providing more detail, and a field (e.g., numeric, dropdown) to provide a response. Some of this information can be copied from the LM case or the most recent NSSAL service (whichever is the most recent).




*Details about how to use each part of the screen are available in the online Service Registration at: https://novascotia.ca/lae/lampss/lampss.asp*

Some details in the Additional Participant Information will pull information from the Adult Learner's case. For example, the Primary Training Reason will populate based on the training reason(s) identified on the case and the Years Since Public High School will calculate based on the current year and any Education History entered on the case.

*Primary Training Reason on the case allows for multiple selections, while the Service Registration field is a single-select. LaMPSS will carry-over the first option selected in the multi-select list on the case, but the choice can be edited in Service Registration if desired.*

## 6.7 Complete Assessment in LaMPSS

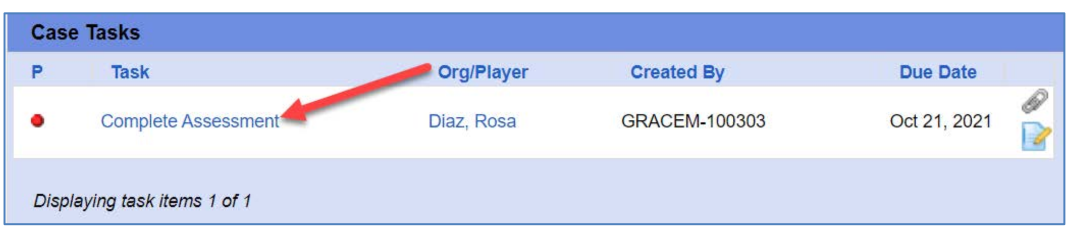
Once you work through the Assessment and Recommended Learnings, potentially included Referrals and Service Registration, you are ready to complete assessment and move the Adult Learner's case into Active status in the system.

> This should be completed when you are ready to move into program delivery with the Adult Learner, but you will be able to revisit previous screens to update information, add assessments, add or update recommended learnings, enter new referrals, manage service participation, and update other items while the case is active.

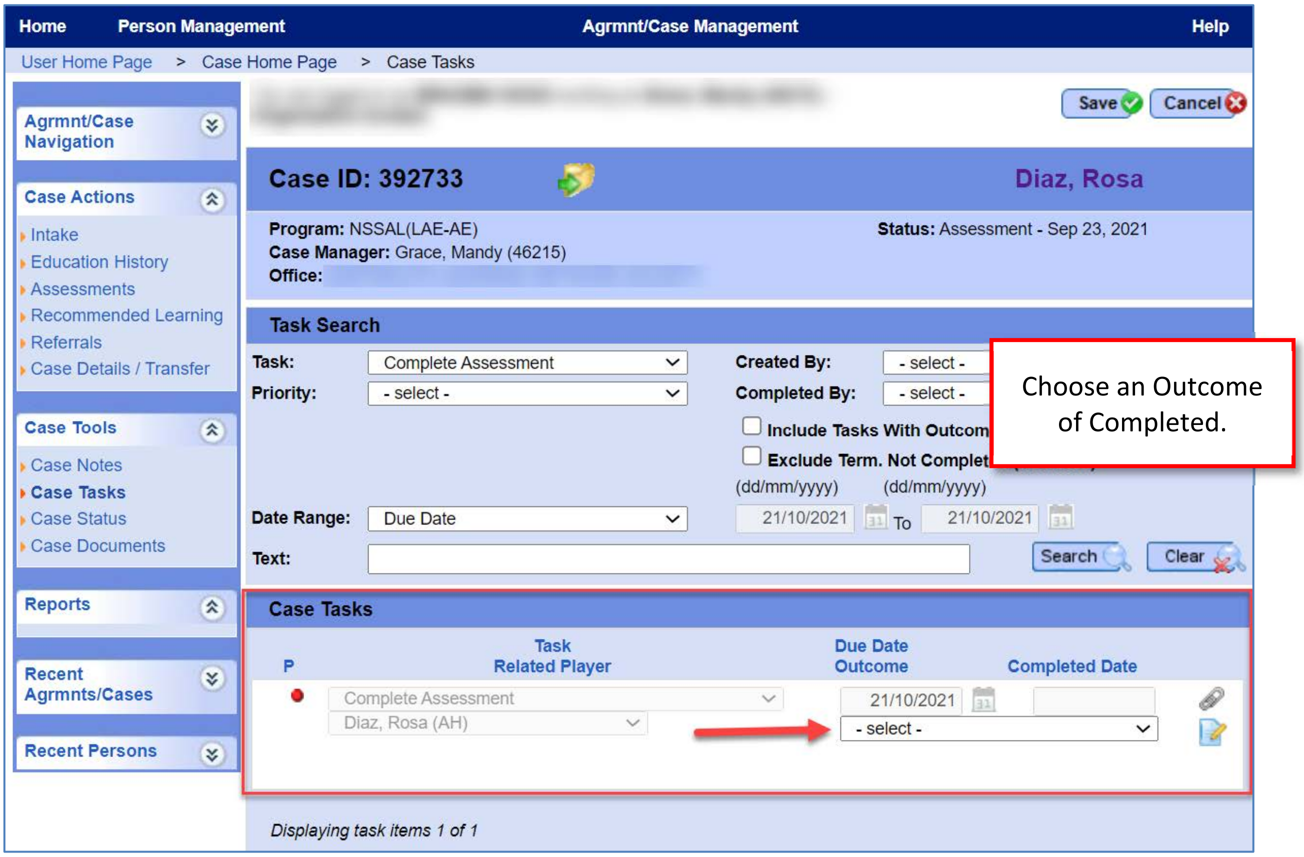
**To change the status to Active, you will record an outcome on the Complete Assessment task for the case.**

You can always access the Case Homepage by using the breadcrumb near the top of the screen if you are on another screen of the case.


**Navigate to the Case Tasks screen by clicking on the Complete Intake hyperlink in the task on your User Homepage or on the Case Homepage.**



**The Case Task screen will display with the currently due task in the middle section of the screen.**




The top section of the screen is used to search for other tasks, but to complete a task use the middle section.

**Choose an Outcome of Completed and select Save.** You can also add additional Case Notes or Case Documents using the icons to the right of the Complete Assessment task.

**If the task is saved successfully, you will be redirected to the Case Homepage**.

*If a required step has not been completed, an error message will display at the top of the screen with further instructions.*

**You will see in the Case Header that the status now shows Active.**

# 7 ACTIVE

## 7.1 Orientation – COMMON PROCESS 7

Many organizations conduct an orientation process for Adult Learners who are new to the organization or starting a new adult learning program.

The orientation has been included in the NSSAL Common Processes Guide as a reminder of how important it is to orient the Adult Learner to ensure they feel comfortable and understand what is expected of them as they re-engage in formal learning. An Orientation Checklist is available as a guide to help ensure a positive learning experience.

Orientation may not occur at this specific point in the LaMPSS process, rather when it makes sense for the Adult Learner and the organization.

## 7.2 Program Specific Assessment – COMMON PROCESS 8

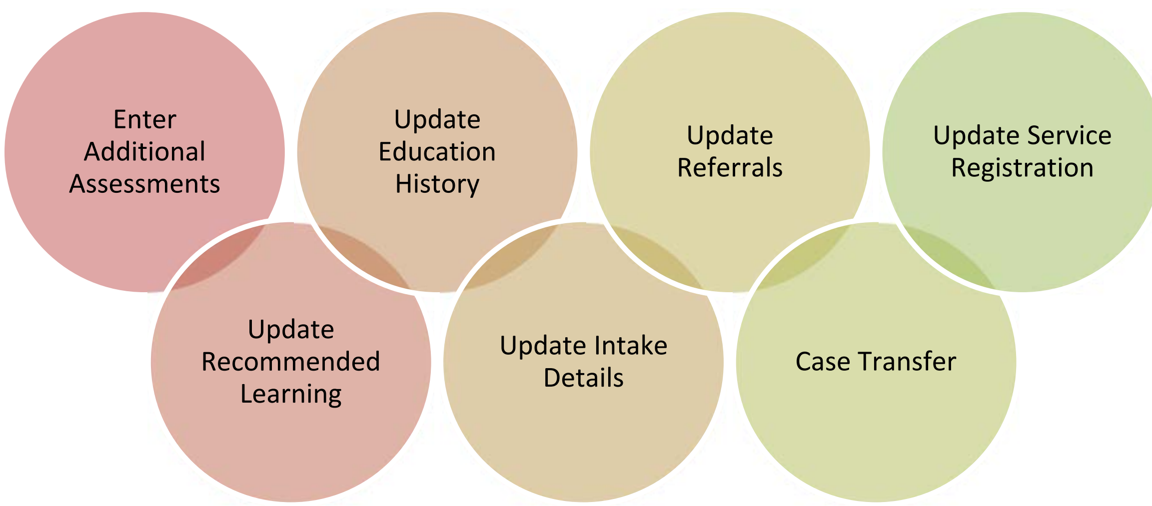
During the Adult Learner's time with your organization, you may use the endorsed E3 Programming assessment tools to conduct in-program assessments. Other assessment tools might also be used. In either situation, the assessment results should be captured in LaMPSS on the Assessments screen to help track the Adult Learner's progress.

The steps to Enter Additional Assessments are included in the Program Delivery section of this guide, found below.

## 7.3 Program Delivery – COMMON PROCESS 9

While the Adult Learner's case is active in the system, there are several things you may do in LaMPSS depending on the situation of the Adult Learner, what has been included in the Learning Plan, and their progress.

This section of the guide outlines the most common LaMPSS areas you may revisit to update with new information while the case is active.



## Enter Additional Assessment(s)

As additional assessments are completed for the Adult Learner (if applicable), they must be captured on the Assessments screen.

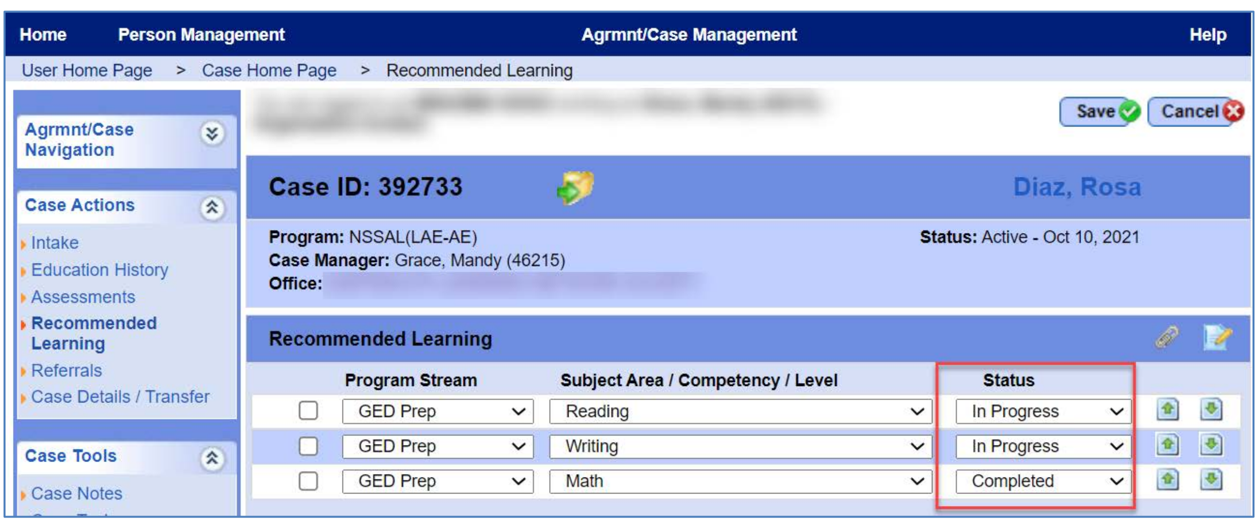

**Use the Create New Version button to capture the information for another assessment.** You can view existing assessments by selecting the version and reviewing the information in the Assessment Questions section of the screen.

See the Capture Assessment in LaMPSS section of this guide for full details on how to complete this screen.

## Update Recommended Learning

As recommended learnings are planned, completed, or not completed they can be captured in LaMPSS on the Recommended Learning screen.

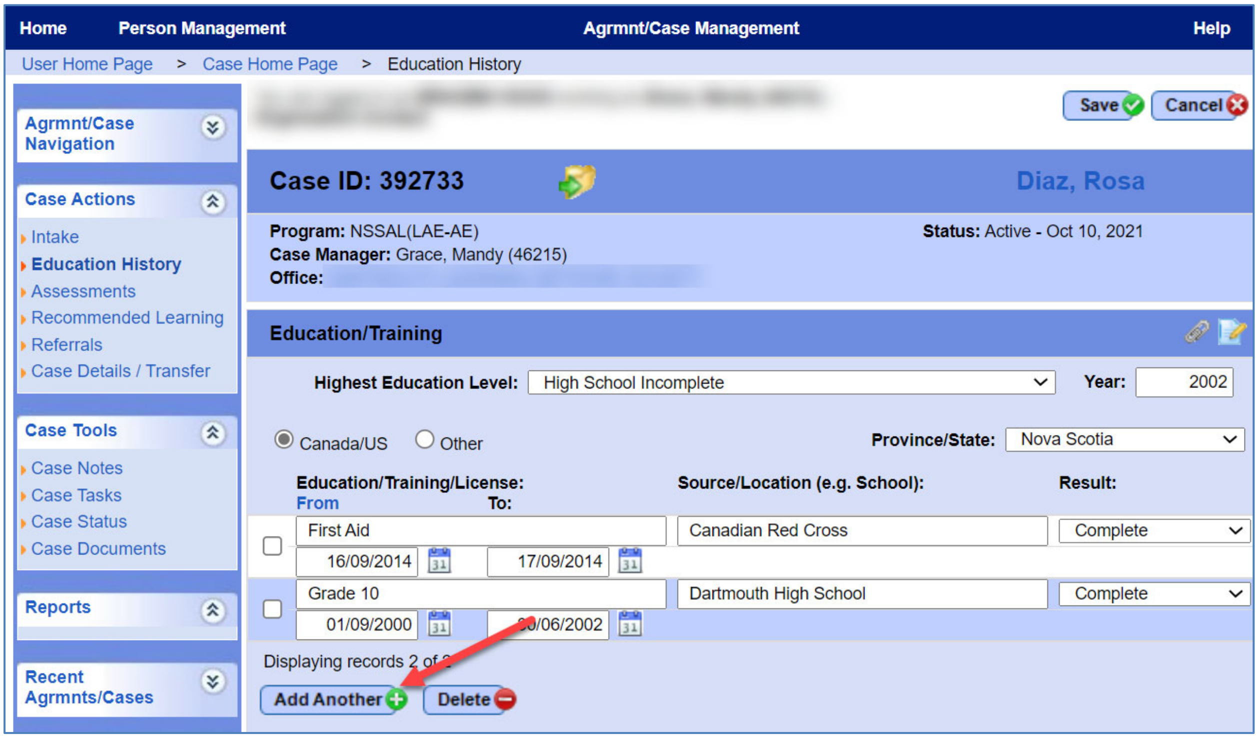
You should update the Status of each recommended learning using the Status drop-down list and add any additional recommendations for the Adult Learner.




See the Capture Recommended Learning in LaMPSS section of this guide for full details on how to complete this screen.

## Update Education History

If the Adult Learner attains additional education, training or licenses while working with your organization, you should capture those additional items on the Education History screen.

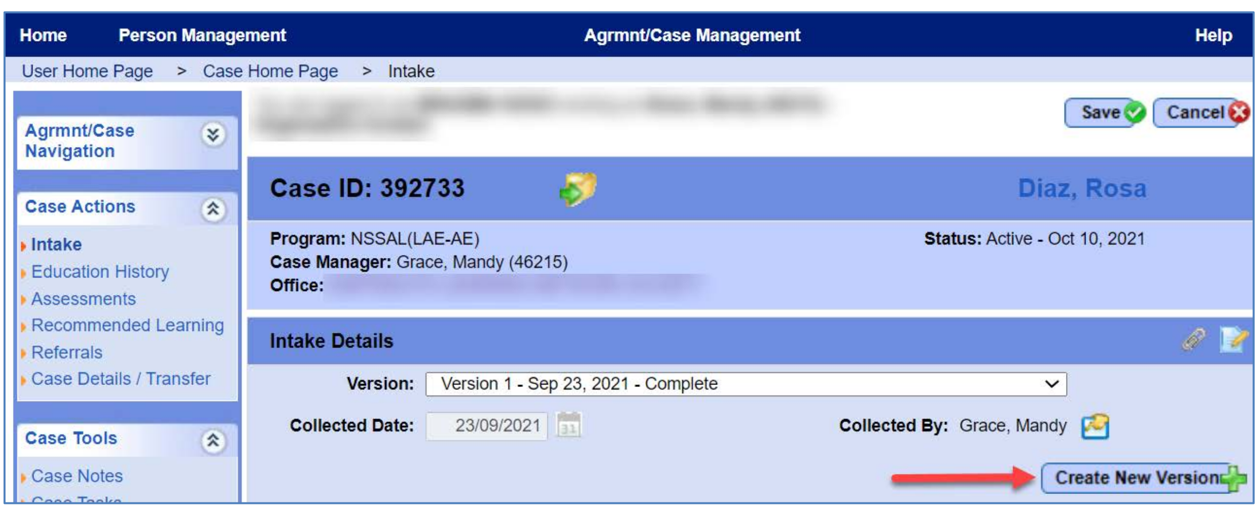



**Use the Add Another button to capture additional Education/Training records.** You can also update the Result for any Education/Training that was in progress.

See the Enter Education History section of this guide for full details on how to complete this screen.

## Update Intake Details

While working with the Adult Learner, you may find the person's situation has changed to the extent that you want to update the Intake Details previously entered on the Intake screen.

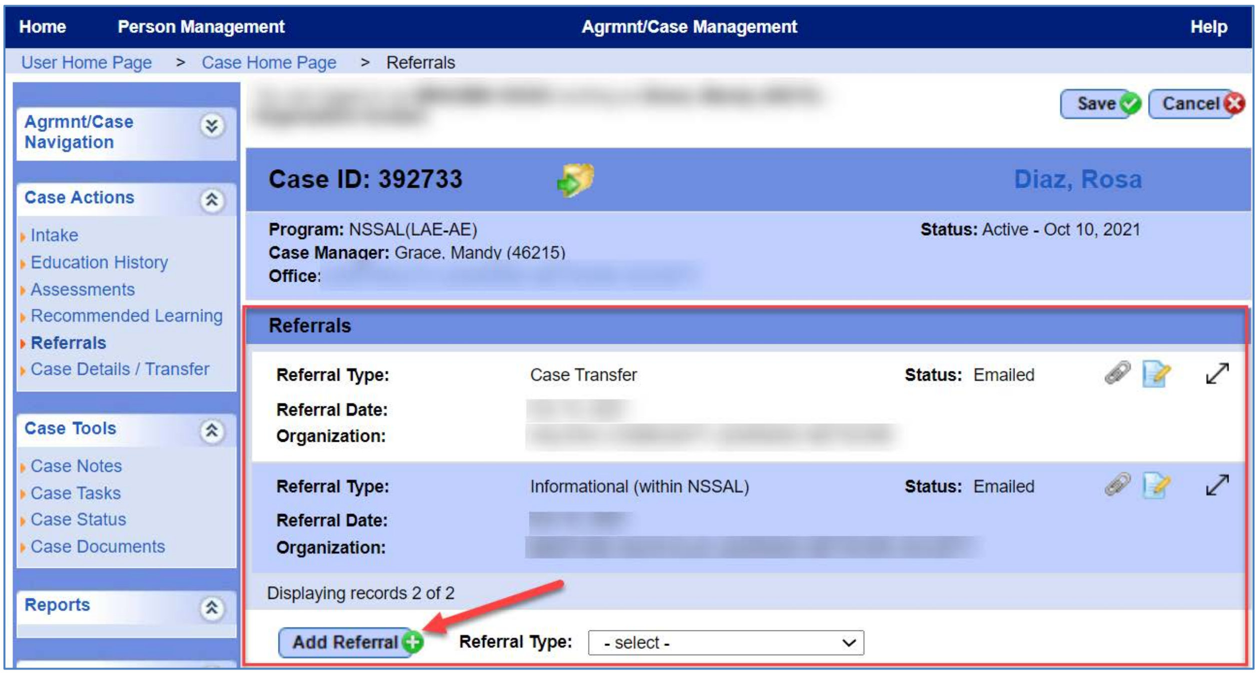


**Use the Create New Version button to update Intake Details.** You can view existing versions of the Intake Details by selecting the version and reviewing the information on the screen.

See the Enter Intake Information section of this guide for full details on how to complete this screen.

## Update Referrals

As the Adult Learner continues to work with your organization, you may complete a referral process for any services that will be provided by another organization using the Referrals screen. This is also where you would communicate to another NSSAL provider that an Adult Learner may wish to transfer.




**Use the Add Referral button to capture additional Referrals**. You can also add notes or documents to existing referral records.

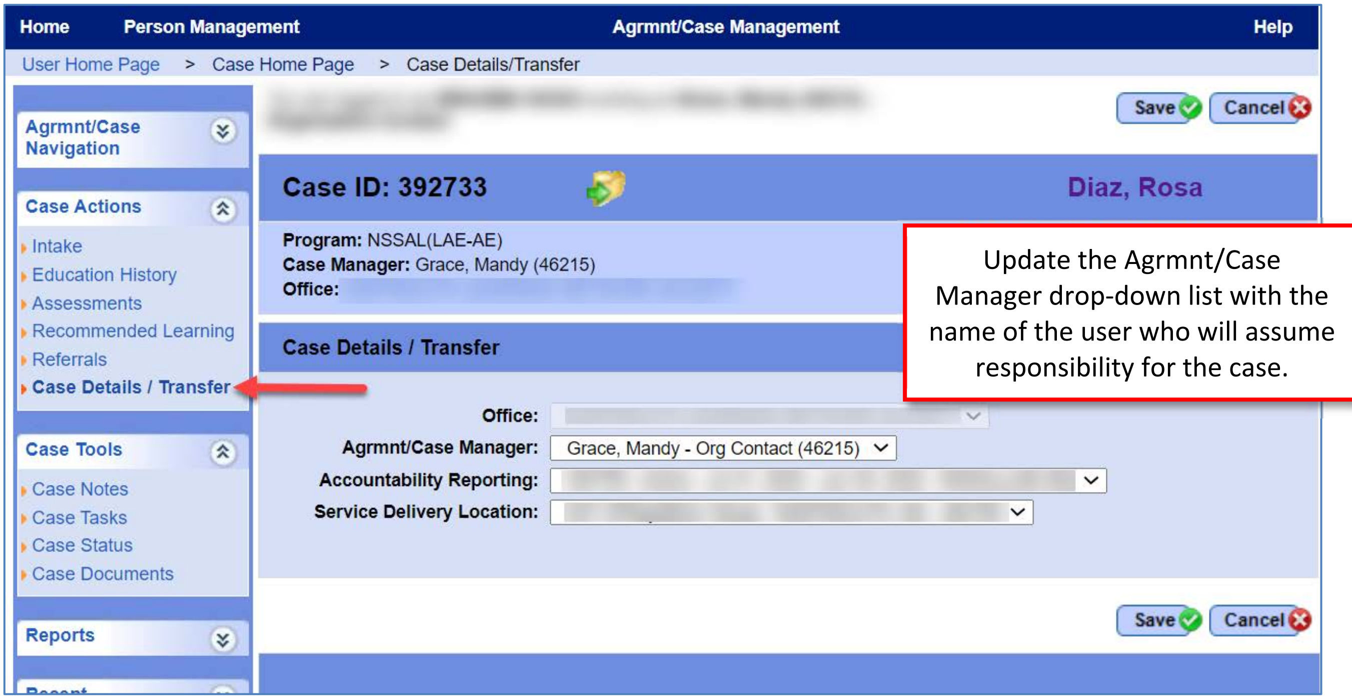
See the Refer Learner and Case Transfer sections of this guide for full details on how to manage referrals.

## Case Transfer

### Within your Organization to Another Staff Member

When a Learner Management case is assigned to someone from your organization in LaMPSS, all tasks and notifications associated with the case will be directed to that user.

To transfer responsibility for the Adult Learner to another user from your organization, use the Case Details/Transfer screen.




Update the Agrmnt/Case Manager drop-down list with the name of the user who will assume responsibility for the case. Click Save.

The LM Case will be assigned to the selected staff person. LaMPSS will assign a system-generated task of "Received In-Office Case/Agreement" to the user receiving the case. This task will appear on both their User Homepage and the Case Homepage to make them aware they have received the case for an Adult Learner.

### To Another NSSAL Provider

Case Transfer is used to transfer the Adult Learner to another NSSAL provider. Once the transfer is complete, the case will be assigned to the new organization instead of your organization.

The Adult Learner may be referred to your organization for service participation, but their case becomes managed by the receiving organization.

See the Transferring a Case from Another NSSAL Provider section of this guide for full details on this process.

Along with the transfer in the system, a soft handoff should be completed by contacting the receiving organization to ensure they are aware of the referral. This is an opportunity to discuss and clarify details about the Adult Learner.

## Update Service Registration

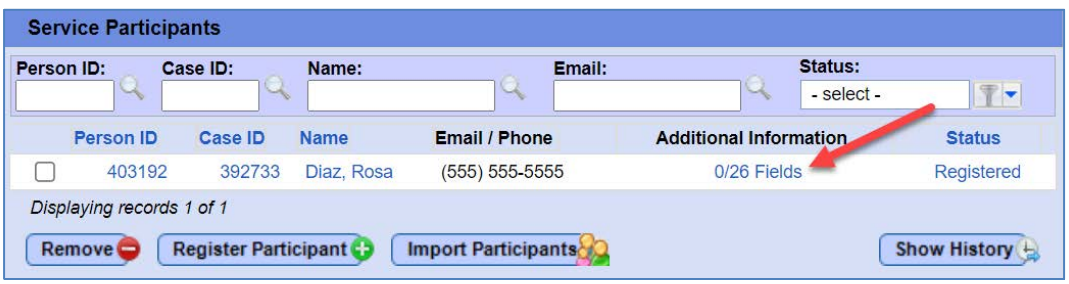
As additional recommended learnings are determined for the Adult Learner, you may need to register the person in additional services using Service Registration.

See the Register Adult Learner in Service Registration section of this guide for additional details on how to register.

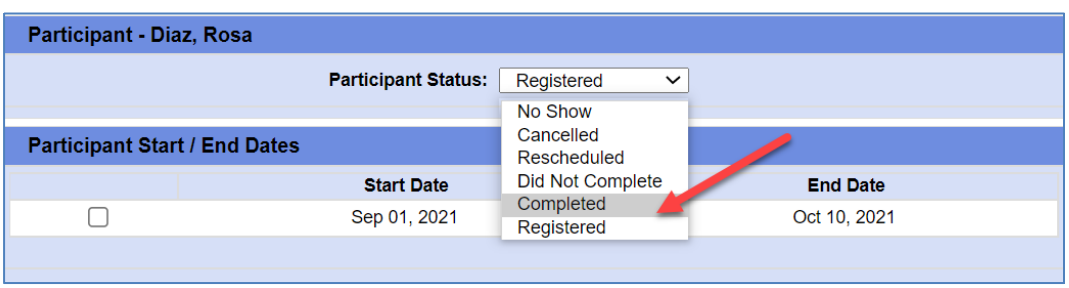
**As the Adult Learner completes services for which they are registered, you will need to update LaMPSS with both the result and immediate outcome information.**

You can navigate to Service Registration through the Org. Service Registration link from your Organization Homepage or by clicking on the hyperlinked Service ID in the Associated NSSAL Services section of the Case Homepage or Person Homepage.


From the Service Participants screen, find the Adult Learner in the list and click on the hyperlinked Additional Information fields (or the hyperlinked Status) to navigate to the Participant Additional Information screen.




Update the Participant Status in the top section of the screen to reflect whether the Adult Learner completed the service. Then, in the next section of the screen, enter the Participant Start and End Dates for the dates the person participated in the service.



Finally, update any Participant Additional Information that was not already completed or copied from the case, including the Immediate Outcome fields that indicate the result of the service for this Adult Learner.


Click Save to finish the participant information entry for this service.

## Complete Yearly Check-In with the Adult Learner

**LaMPSS provides various tools to help you manage your workload of Adult Learners and their cases. One of these tools is a task that will automatically be created when the case moves into active status.**

**This task is called Complete Annual Review and will have a due date at the end of June of the current/upcoming year.**

The Complete Annual Review task will appear on the User Homepage of the assigned staff for the Adult Learner as a reminder to check-in on the case. It will appear at the beginning of May to allow time to complete the review and record that you have done so in the system.

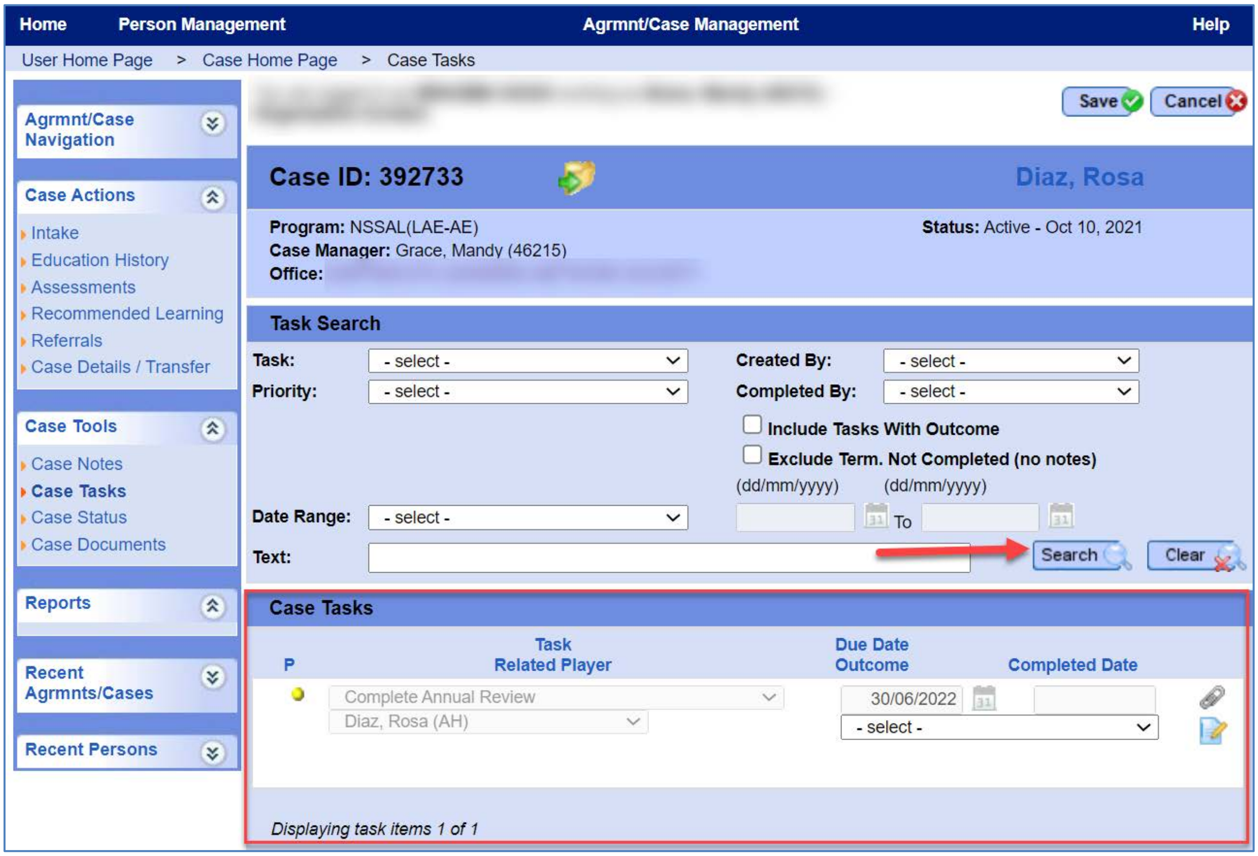
*If the case is newly created within 2 months of when this task would be due, the task will not be created for that first year.*

**It is suggested that for the annual review to be complete the following should be done:**

- Print out the Adult Learner's Case Detail Report and have the person review their information to ensure it is accurate and up to date.
- Make any necessary updates to the Adult Learner's contact or other information.
- Update the case with any assessments that may have happened throughout the duration of the program to-date.
- Depending on where the Adult Learner is on their learning journey, it may be time to conduct another assessment to determine if progress is being made or if it is time to revisit and update the Recommended Learnings.

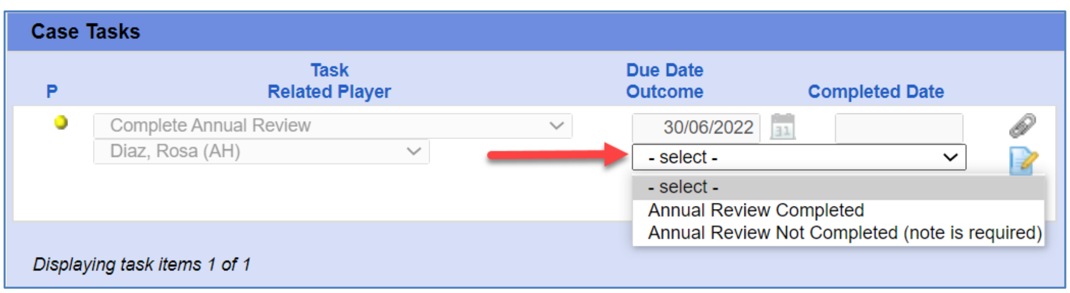
**To complete the review in LaMPSS, navigate to the Case Tasks screen by clicking on the Complete Annual Review hyperlink in the task on your User Homepage or on the Case Homepage.**

**The Case Task screen will display with the currently due task in the middle section of the screen.**




**Choose an Outcome of Completed and select Save.** You can also add additional Case Notes or Case Documents using the icons to the right of the task.

*You can also use the task to indicate an annual review was not completed for this Adult Learner. If you select this outcome, you will be required to add an explanatory note before saving.*




**If the task is saved successfully, you will be redirected to the Case Homepage**.

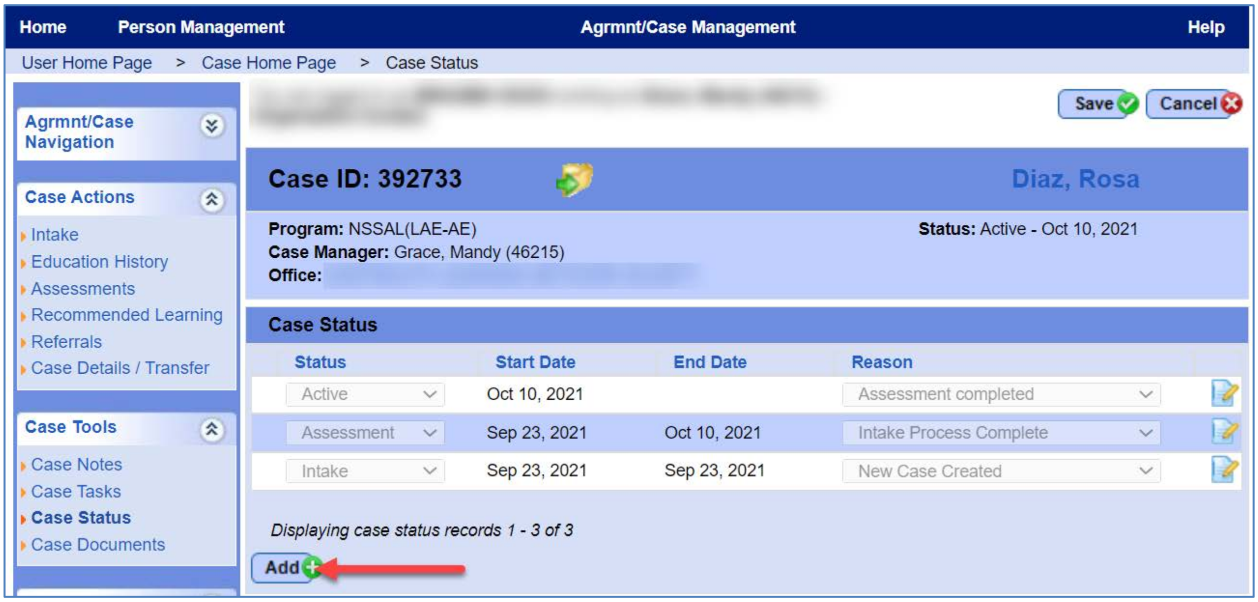
## Place Case On-Hold

**There may be situations when the Adult Learner stops participating in services for a period.** This could be the result of family-related issues, financial barriers, health-related issues, seasonal employment, transportation barriers, as well as a host of other reasons.

**Instead of closing the Adult Learner's case, you can change the status to On Hold to reflect that the person is not currently participating but may return in the future**.

! *A case does not need to be placed on hold during typical breaks such as Christmas or summer holidays.*

**From the Case Homepage, select Case Status in the left navigation menu.**



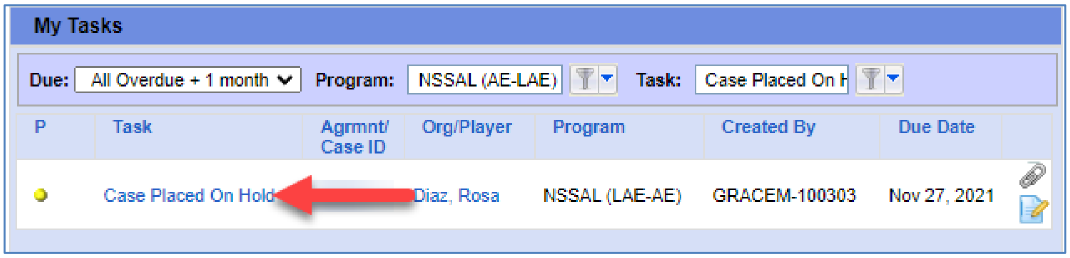

**On the Case Status screen, use the Add button to create a new row.** The status history of the case can be reviewed here.


**From the Status drop-down, select On Hold.**

**From the Reason drop-down, select the best option.** If you select Other, you should always enter a note to provide additional explanation.

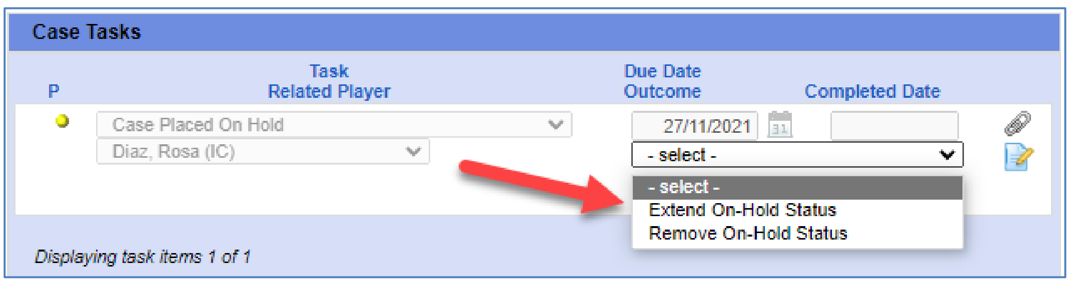
**Click Save to place the case On Hold.** You will be redirected to the Case Homepage.

LaMPSS will generate a task named Case Placed On-Hold which will appear both the Case Homepage and your User Homepage to remind you to check in with the Adult Learner to determine if or when they will continue with the program.




Use this task to extend or to remove the On-Hold status as the Adult Learner's situation progresses.

You can click on the hyperlinked task name to navigate directly to the Case Tasks screen.




Selecting an outcome of Extend On-Hold Status will extend the current Due Date for the task by another month. If the Adult Learner is ready to resume their participation, you can select Remove On-Hold Status to return the case to Active status.

*If you determine the Adult Learner will not return to NSSAL, you will need to close the case. A case cannot move to Closed from On-Hold status. You should first use the task to remove the On-Hold status, then you can proceed to close the case once it is active.*

# 8 CLOSE OUT

## 8.1 Complete Close Out in LaMPSS – COMMON PROCESS 10

When the Adult Learner completes or discontinues the program, the case can be closed in LaMPSS.

*In the future, the system will also close cases automatically under certain conditions. This functionality is planned for a release after the initial launch of Learner Management in LaMPSS.*

### Automatic Closing of a Learner's Case

Once the functionality is implemented, LaMPSS will automatically monitor Learner Management cases for those with no activity.

The system will automatically close any case where the Adult Learner has not participated in NSSAL services, captured in LaMPSS service registration, for 12 months (calculated from the last service end date) *or* where there has been no service registration LaMPSS will use 12 months from the date the case is created

A closed case can be reopened if the Adult Learner were to return for additional services in the future. See the Re-Open a Previous NSSAL-LM Case for full details on this process.

### Close a Learner's Case Manually

**If an Adult Learner is exiting NSSAL programming, the case can be closed right away using the Case Status screen.** Otherwise, after a period of inactivity as described above LaMPSS will automatically close the case.

**On the Case Status screen, use the Add button to create a new row then select Closed as the new status.**


**From the Reason drop-down, select the appropriate option**. If the Adult Learner has successful completed the program, select "Successful Conclusion". Otherwise, choose the most appropriate option to reflect why the person will not continue. If you select Other, you should always enter a note to provide additional explanation.

**Click Save to complete the case closure.**

*If the Adult Learner is registered in ongoing services within LaMPSS Service Registration, the case will not be able to be closed until the participant status for those services is updated to Complete (or Did Not Complete, Cancelled, etc.). Your Adult Education Coordinator can assist in navigating conversations where the services may be offered by an organization other than your own.*

*LaMPSS will display a warning message if any items on the Recommended Learning screen are still "In Progress" or "Recommended"; however, you can continue and close the case if desired. The status for those items will be updated to "Not Completed."*

## 8.2 External Referral – COMMON PROCESS 11

Case Transfer is used to transfer the Adult Learner between NSSAL providers. Once the transfer is complete, the case will be assigned to the new organization instead of your organization.

The Adult Learner may be referred to your organization for service participation, but their case becomes managed by the transferring organization.

See the Transferring a Case from Another NSSAL Provider section of this guide for full details on this process.

Along with the transfer in the system, a soft handoff should be completed by contacting the receiving organization to ensure they are aware of the referral. This is an opportunity to discuss and clarify details about the Adult Learner.

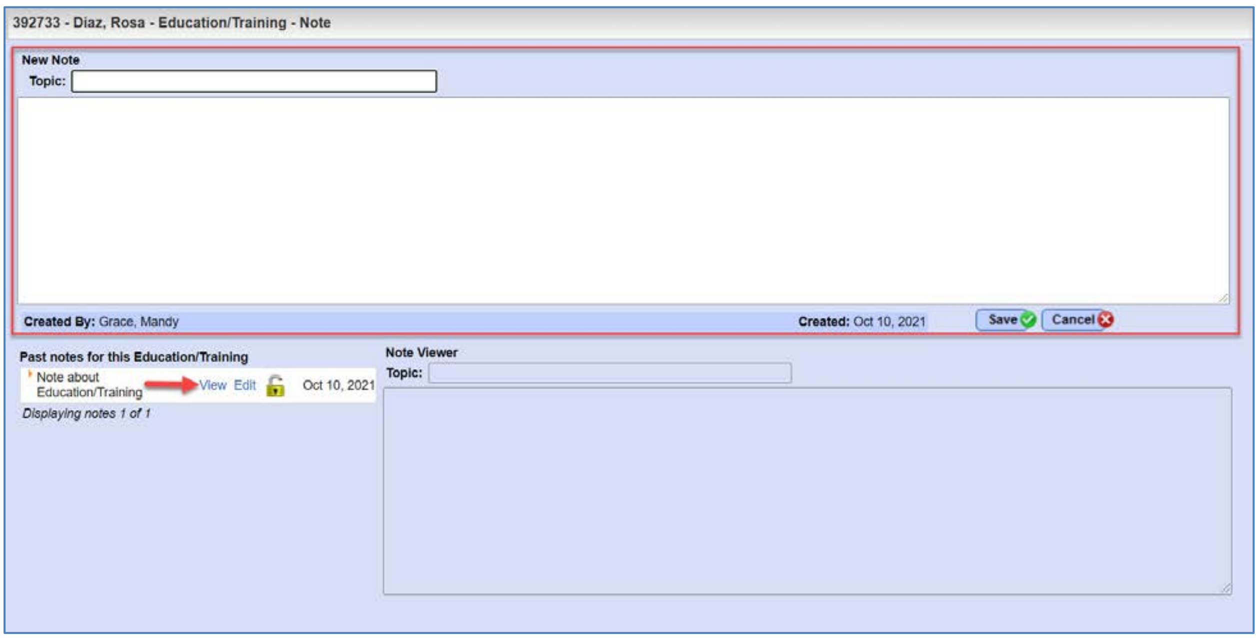
# 9 CASE TOOLS

Throughout LaMPSS Learner Management there are a variety of tools you will use to manage your Adult Learners' cases. This section provides an overview of each tool.

## 9.1 Case Notes

**Notes are an important tool for capturing information throughout the Adult Learner's case.** Notes are available on most case screens, making it simple to add additional information and details beyond what can be captured within the screen.

**A note can be added anywhere these icons appear:**




**When you select the icon, the Note window will popup. You will enter a Topic as well as the text of the note.** Any past notes for the current section of the case being worked on will appear in the bottom left-hand corner of the popup window.

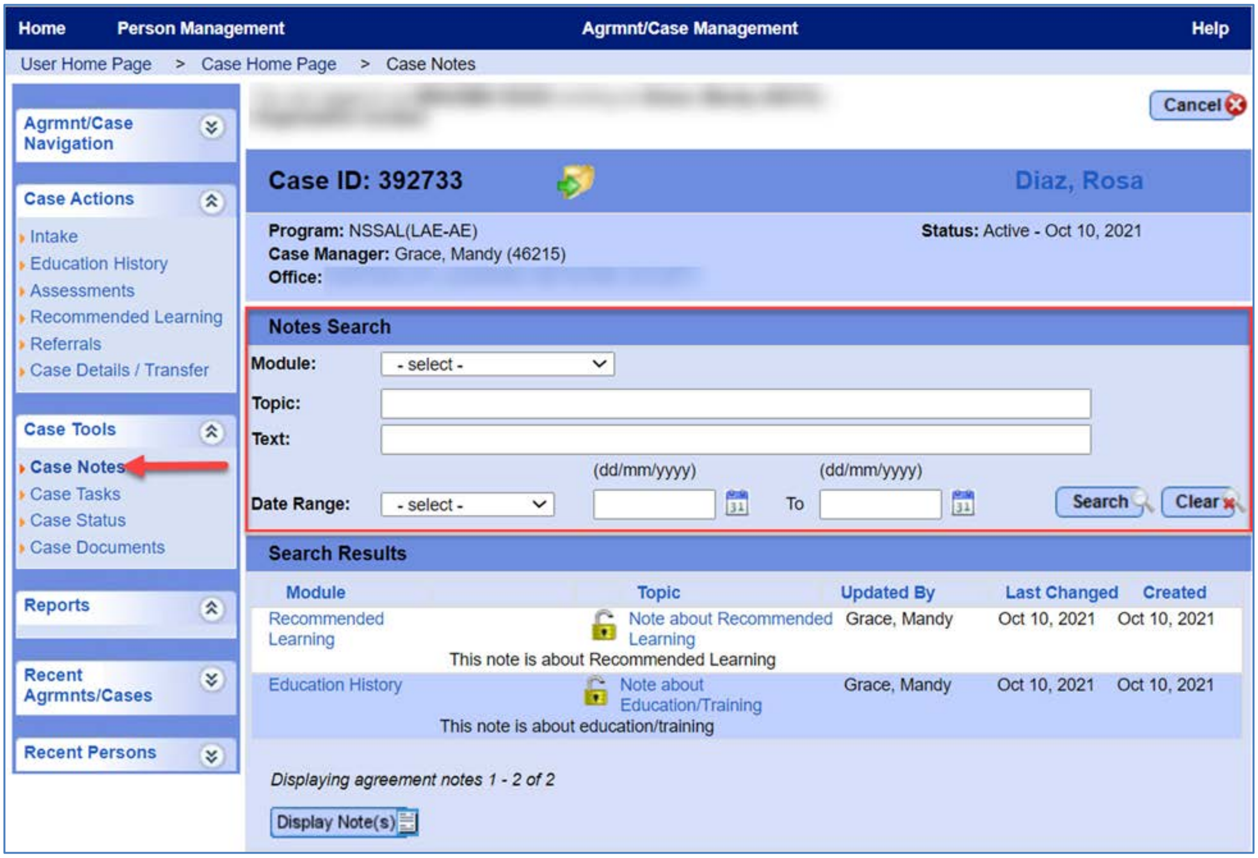
**When you finish entering the note, click Save.** LaMPSS will execute a spell-check and then save the note.

Your user ID as well as the date and time a note is created are automatically stored and each note is tagged with the part of the case where it is created. This makes it easy to search for notes and know who wrote each one and when.

LaMPSS locks the content of notes after 30 days. Until they are locked, the content of notes can be edited or added to, if required. Notes cannot be deleted.

**Notes can also be added for each question on specific screens, like Intake, where this icon appears:**

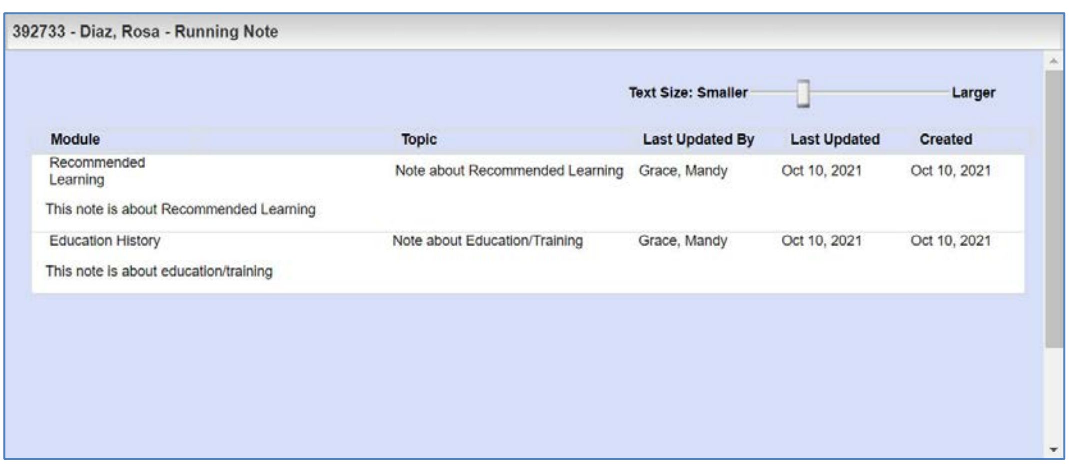
**To search for a note or view all notes for an Adult Learner's case, use the Case Notes screen in the Case Tools section of the left navigation menu.**




The top section of the screen includes a Notes Search that can be used to search for notes across all the screens of this case. You can search by the Module where the note was created or enter a Topic or Text for the search. You can also narrow the results by a specific date range.

**The Search Results will initially display all notes.** If search criteria are entered, after you select Search the result will display only the notes that match your search.

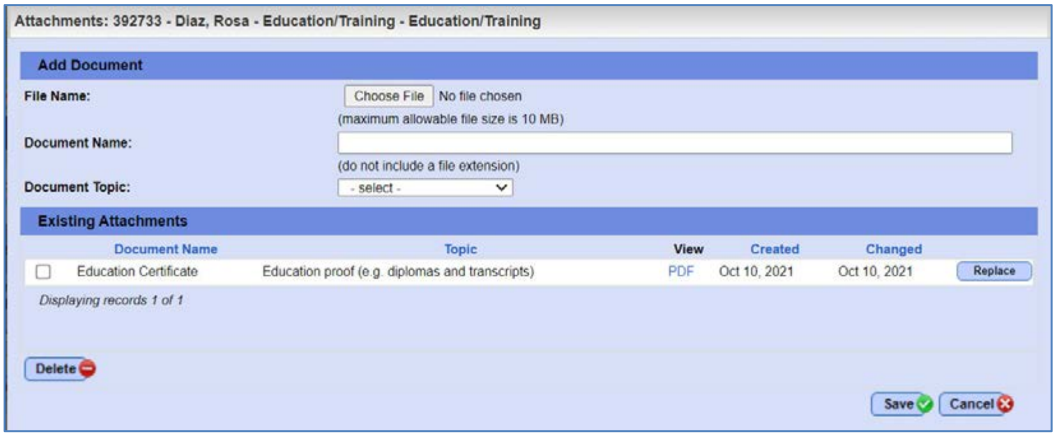
**You can view all the notes in the current results by clicking the Display Notes button.** A Running Note popup window will appear with all the current notes.



## 9.2 Case Documents

**LaMPSS includes the ability to attach documents to a case throughout the Adult Learner's engagement with NSSAL.** Documents may be attached to a case beginning in intake with the Intake Form through to when a case is closed. Documents attached to the system could contain any type of supporting information for the Adult Learner's case.

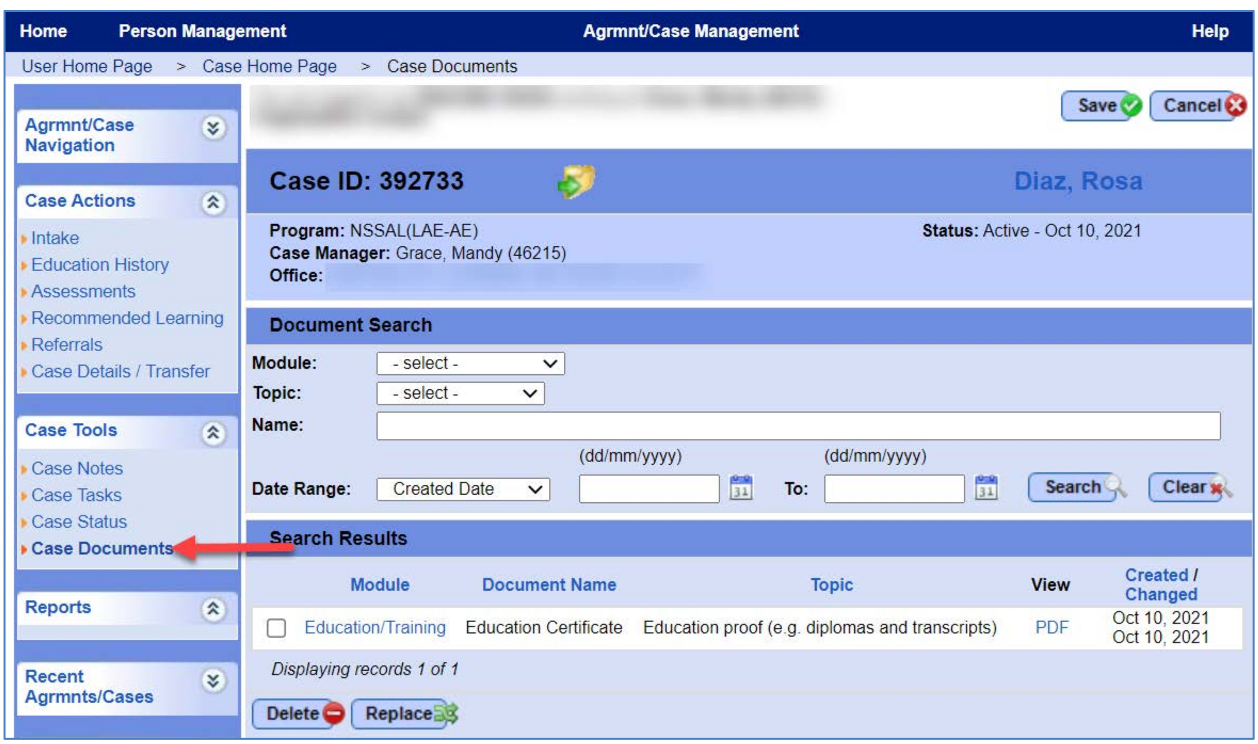
**A document can be added anywhere these icons appear:**




**When you select the icon, the Document window will popup. You will select a file from your computer, enter a Document Name, and select a Document Topic from the drop-down list.** Any documents previously attached for the current section of the case being worked on will appear in the bottom of the popup window.

**When you finish completing the Add Document fields, click Save.**

To search for a document or view all documents, use the Case Documents screen in the Case Tools section of the left navigation menu.



**The top section of the screen includes a Document Search that can be used to search for attachments across all the screens of this case.** You can search by the Module where the document was added, by Topic, or by the document's Name. You can also narrow the results by a specific date range.

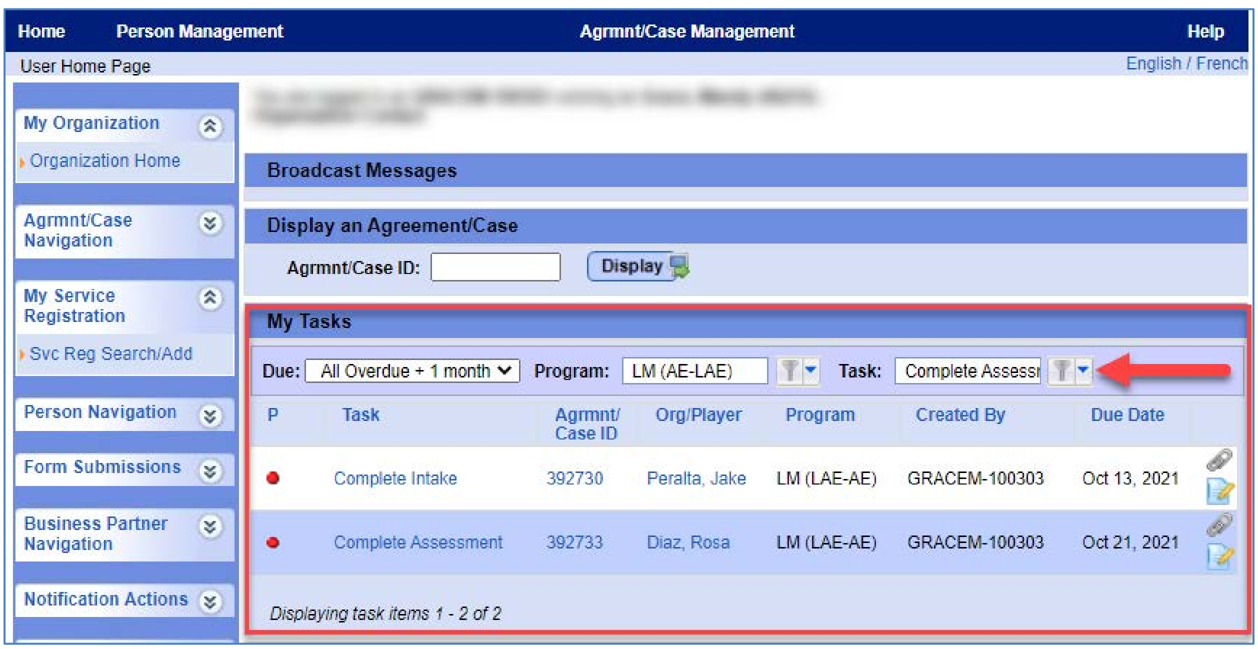
**The Search Results will initially display all documents.** If search criteria are entered, after you select Search the result will display only the documents that match your search. **To view the document, click on the hyperlinked file format in the View column.**

If a document needs to be deleted or replaced (i.e., it was newly added within the past 30 days) there will be a checkbox to the left of the document in the Search Results. Select the checkbox and click either Delete or Replace, depending on the action you want to complete. After 30 days, the document will be locked and cannot be deleted or replaced.

## 9.3 Case Tasks

**Case tasks are case-related activities to be completed within a certain timeframe. Only LM Managers who have cases assigned in LaMPSS for their Adult Learners will have tasks on their User Homepage.**

**On the User Homepage, a listing of tasks due within the upcoming 30-60 days will be displayed.** The due date for each task appears along with a low, medium, or high priority indicator (i.e., green, yellow, or red dot).

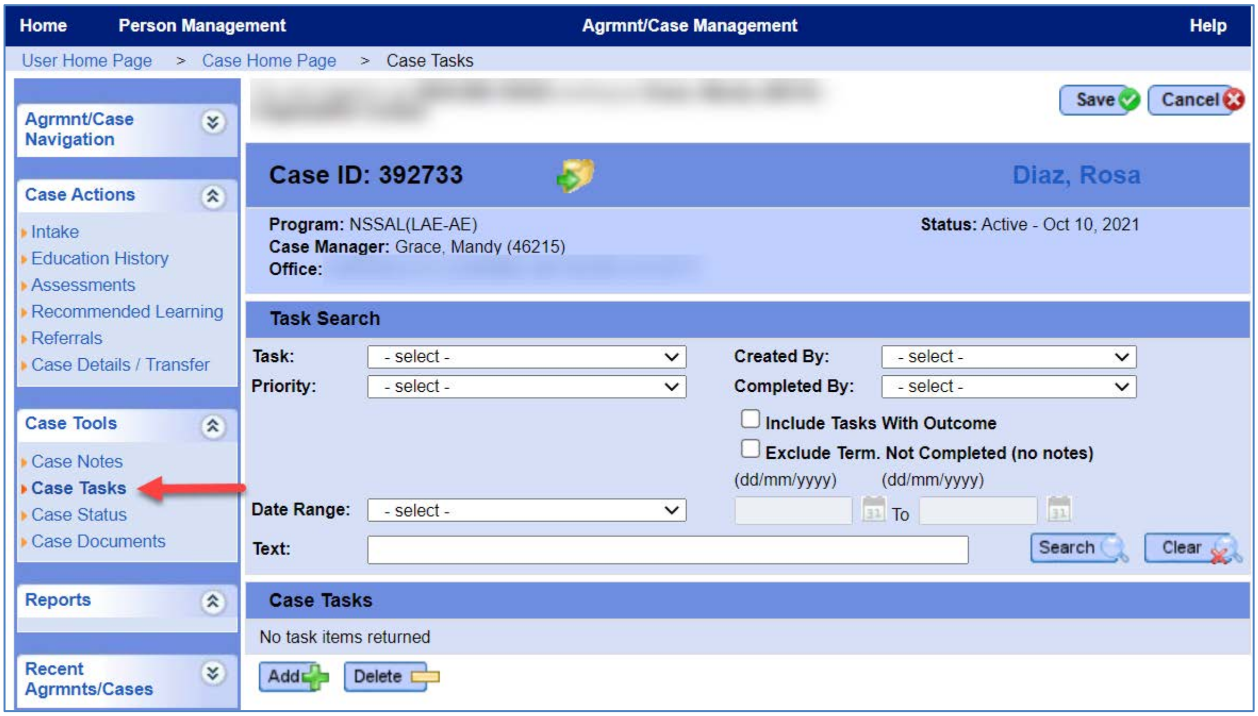



**Because tasks are always associated with a case if responsibility for the case is transferred to another user, all tasks related to the case are also transferred to that user.**

Tasks can be automatically created by LaMPSS or manually created by an LM Manager.

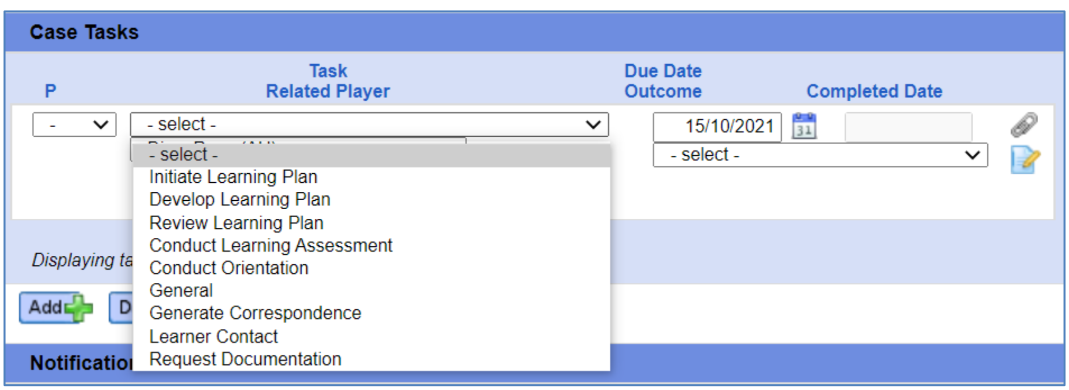
Tasks can be used to record events that have already occurred, adding notes and documents as appropriate, or to set a reminder for things that should take place in the future and provide a means to record information at that point in time.

**To manually create a task, select Case Tasks in the left navigation menu of the desired case under Case Tools.**



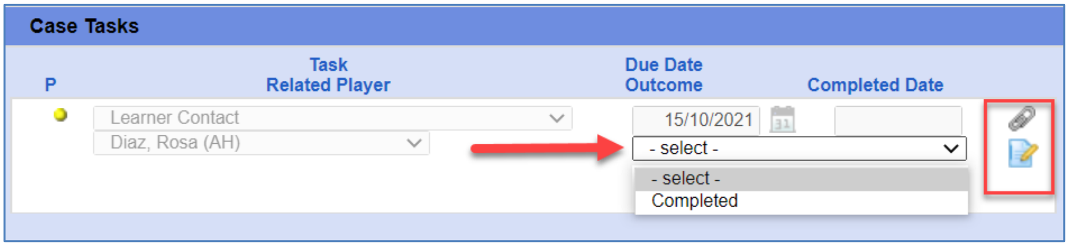

**The top section of the screen includes a Task Search that can be used to search both upcoming and completed tasks.**

**The Case Tasks section is where you can add additional tasks by selecting Add or deleting previously created tasks using the Delete button.**




**To create a task, select a Priority, the name of the task, and a Due Date.** When you save the screen, the task is created and added to the Adult Learner's case. When the due date for the task approaches it will appear on the assigned LM Manager's User Homepage as well as the Case Homepage.

**To complete a task, whether system-generated or manually created, select an Outcome from the drop-down list on the Case Tasks screen.**



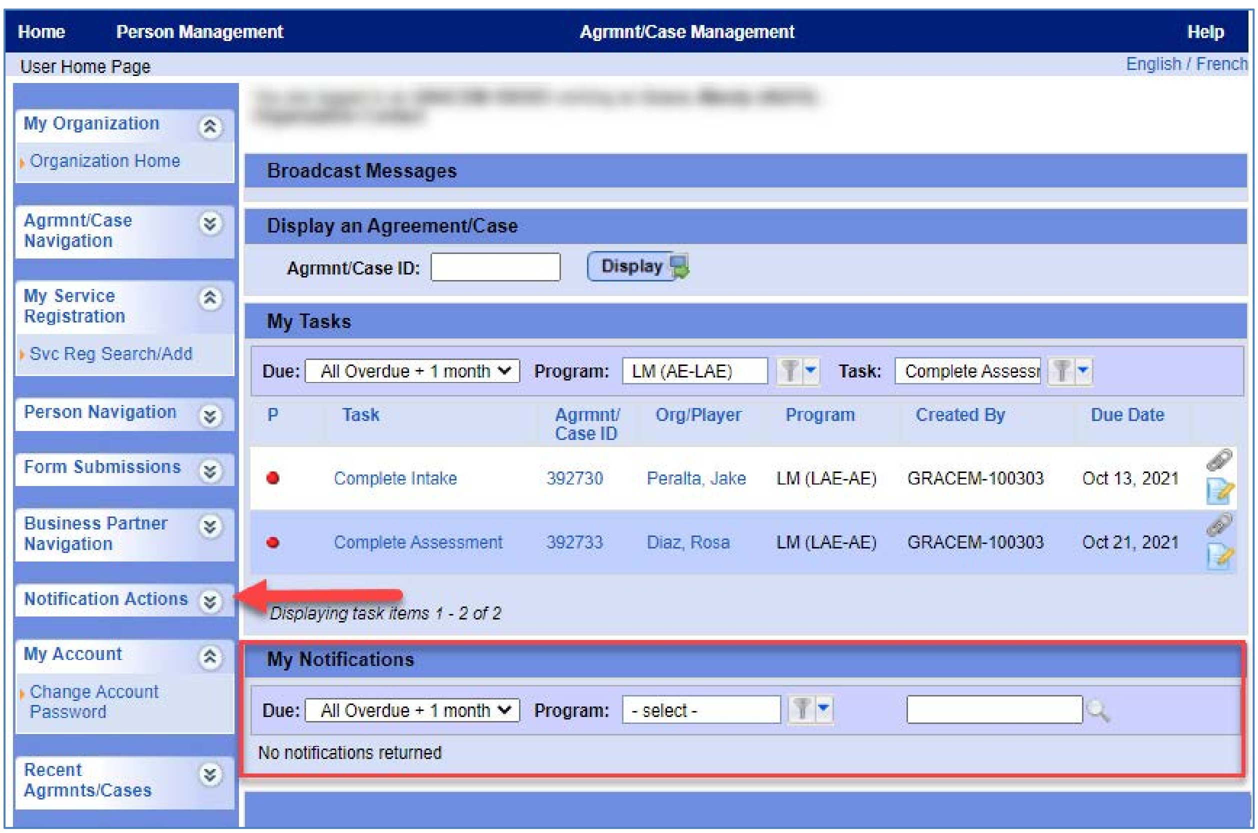

You can add notes or documents to the task, then save the screen. As tasks are completed LaMPSS saves and stores all information about the task within the case for future reference.

## Notifications

**Notifications are like Case Tasks in that they serve as reminders of key actions. They will appear on your User Homepage and on a Case Homepage when associated with a case.**

Notifications are associated with a user, while Case Tasks are associated with a case. While notifications can be linked to specific case as well, the primary connection is with the user ID a notification is assigned to.

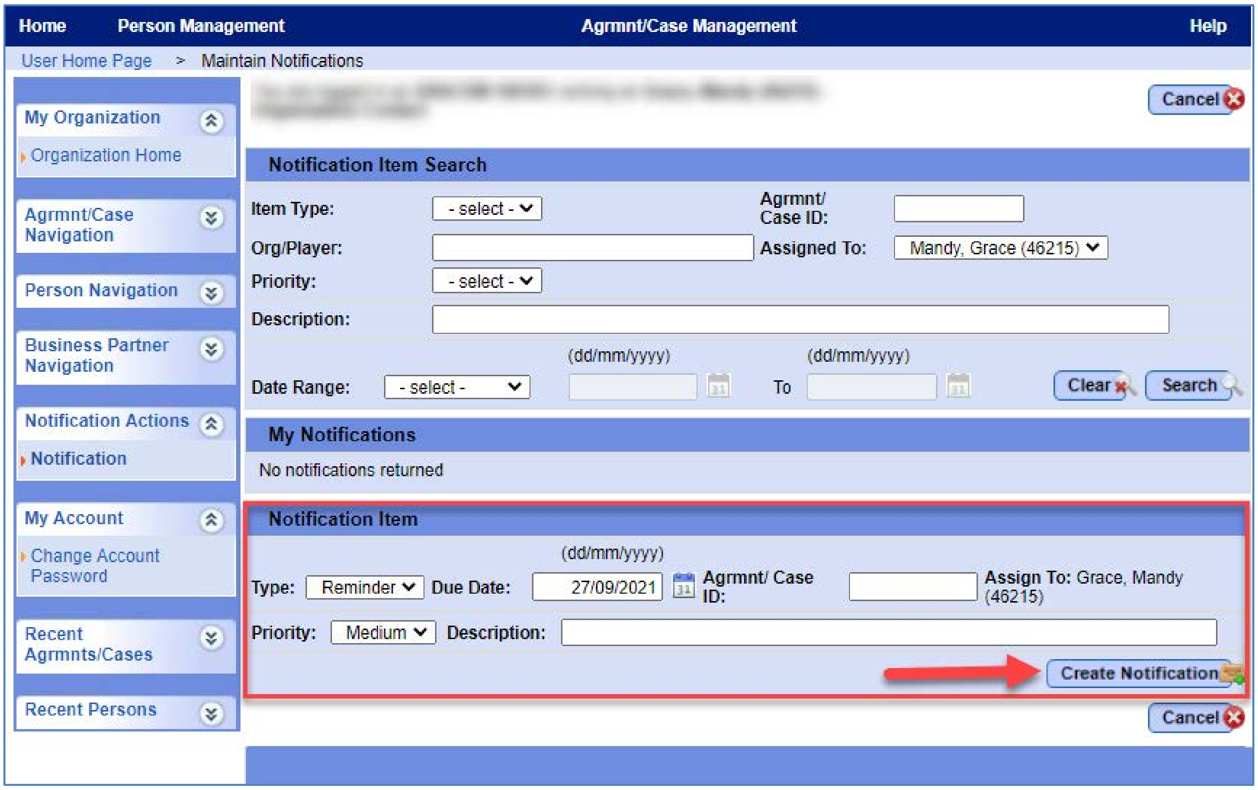
Another way notifications differ from Case Tasks is once a notification has been addressed or deleted, the information is not stored in LaMPSS for future reference.




Notifications can be automatically generated by LaMPSS, or users can manually create notifications.

**To create a notification, use the Notification Actions section in the left navigation menu.**

Notifications are a good way to create reminders for yourself and about items that need to be completed for your Adult Learners.

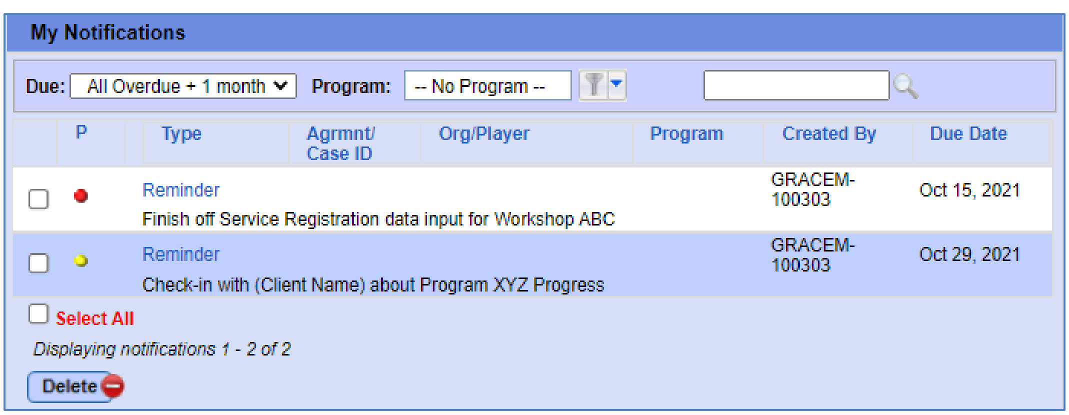



The top section of the screen includes a Notification Search that can be used to search existing notifications.

The Notification Items section is where you can add additional notifications.

**To create a notification, select the Type, Due Date, Priority, and enter a Description.** You may also want to enter a six-digit Case ID this notification is associated with.

**Click Create Notification to save the new notification.** When the due date for the notification approaches it will appear on your User Homepage as well as the Case Homepage if a Case ID was entered.



## 9.4 Case Search

**The Case Search is accessed in the top navigation using the Agrmnt/Case Management hyperlink.**

On initial load, the screen will display of the cases currently assigned to you, the logged in user.

You can search for a case in several ways:

- **Agrmnt/Case ID –** Enter a 6-digit case ID to search for a specific case
- **Agrmnt/Case Type – The** case type will be Learner Management unless you also have privileges for another case type in LaMPSS, such as the External Case Management used by Nova Scotia Works providers.
- **Agrmnt/Case Status –** Select a status from the drop-down list to narrow the search results to reflect only cases in that status.
- **Office –** If your organization is setup in LaMPSS with more than one service delivery location, select an office to narrow the search results to reflect only cases assigned to that office
- **Agrmnt/Case Manager –** Select a staff name from the drop-down list to narrow the search results to reflect only cases assigned to the user selected


**Click Search to display results for the current search in the bottom of the screen.** There may be more than one page of results which can be navigated using the VCR controls that will appear when multiple pages exist.

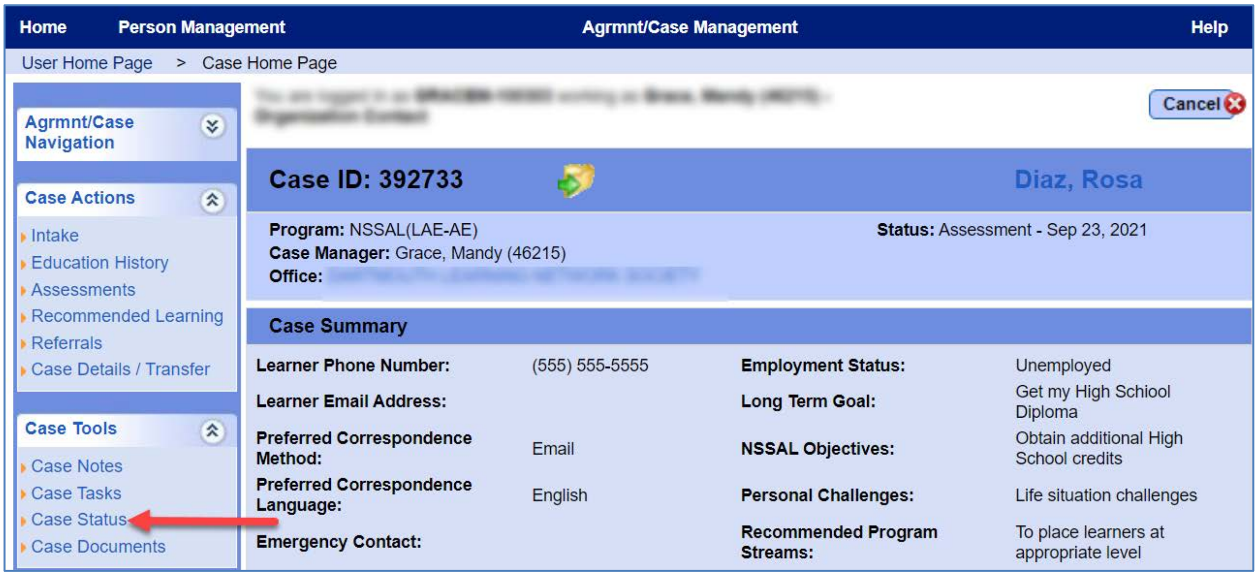
At any time use the Clear button to clear all search parameters to start over.

*If you want to include Closed cases in the search, you will need to de-select the "Exclude 'Closed' Agrmnts/Cases" checkbox.*

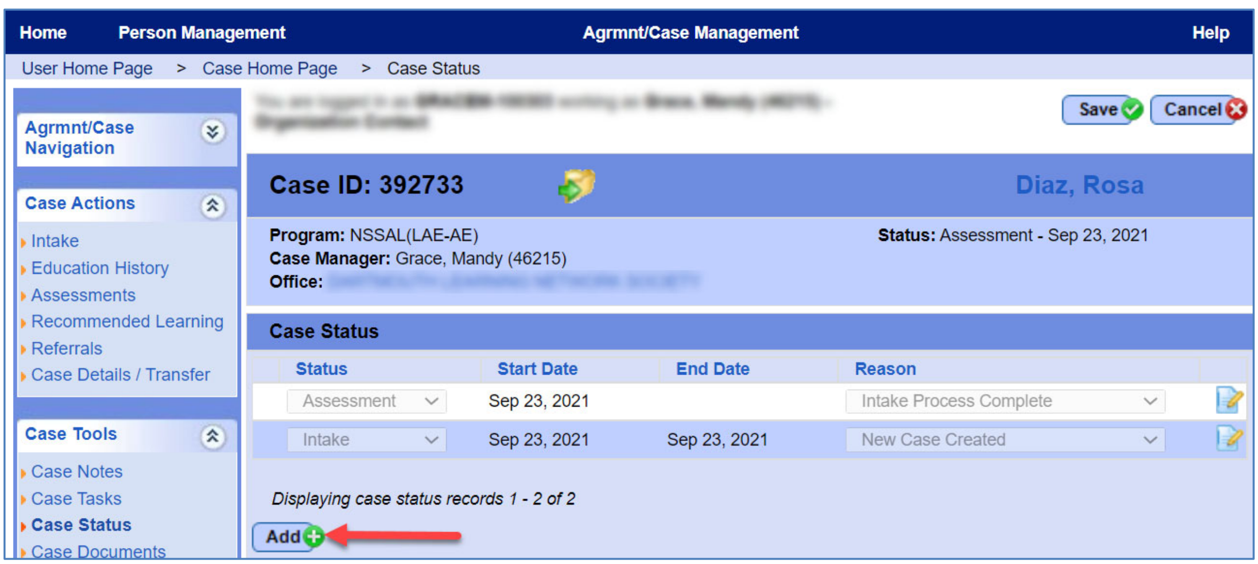
## 9.5 Case Status

Often the status of a case will change based on the completion of Case Tasks as you work with an Adult Learner. The status can also be updated manually using the Case Status screen.

**From the Case Homepage, select Case Status in the left navigation menu.**




**On the Case Status screen, use the Add button to create a new row.**



**From the Status drop-down, select one of the available status options.** The options here are dependent on the status of the case.


**From the Reason drop-down, select the reason why the case status needs to change.** You can also use the Case Note icon to the right of the row to make a note about the circumstances for changing the status.

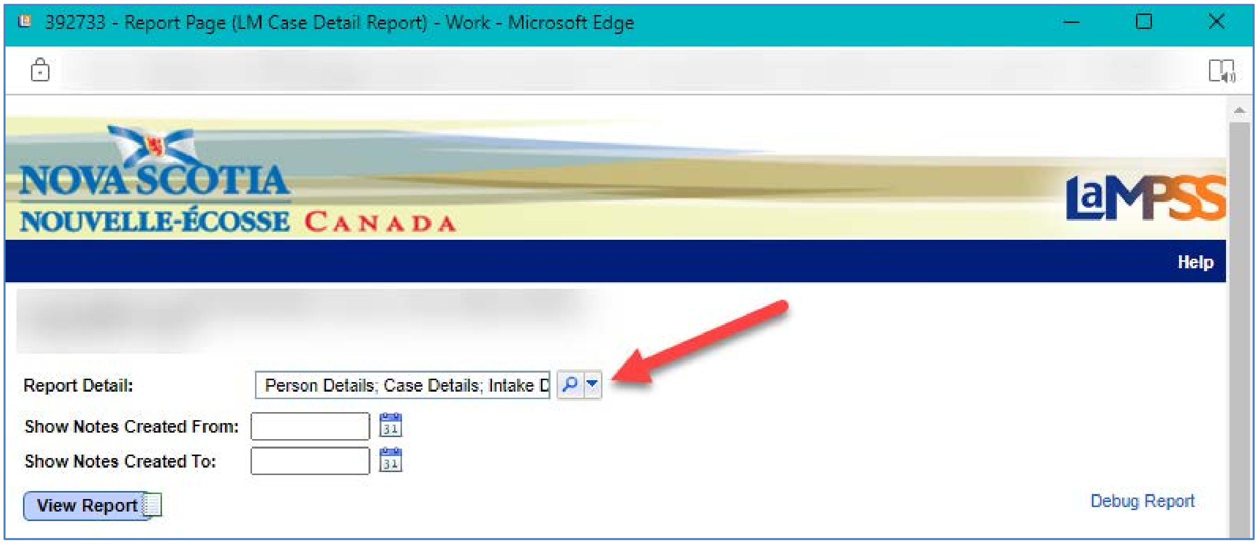
**Click Save to complete the process.** You will be redirected to the Case Homepage.

## 9.6 LM Case Detail Report

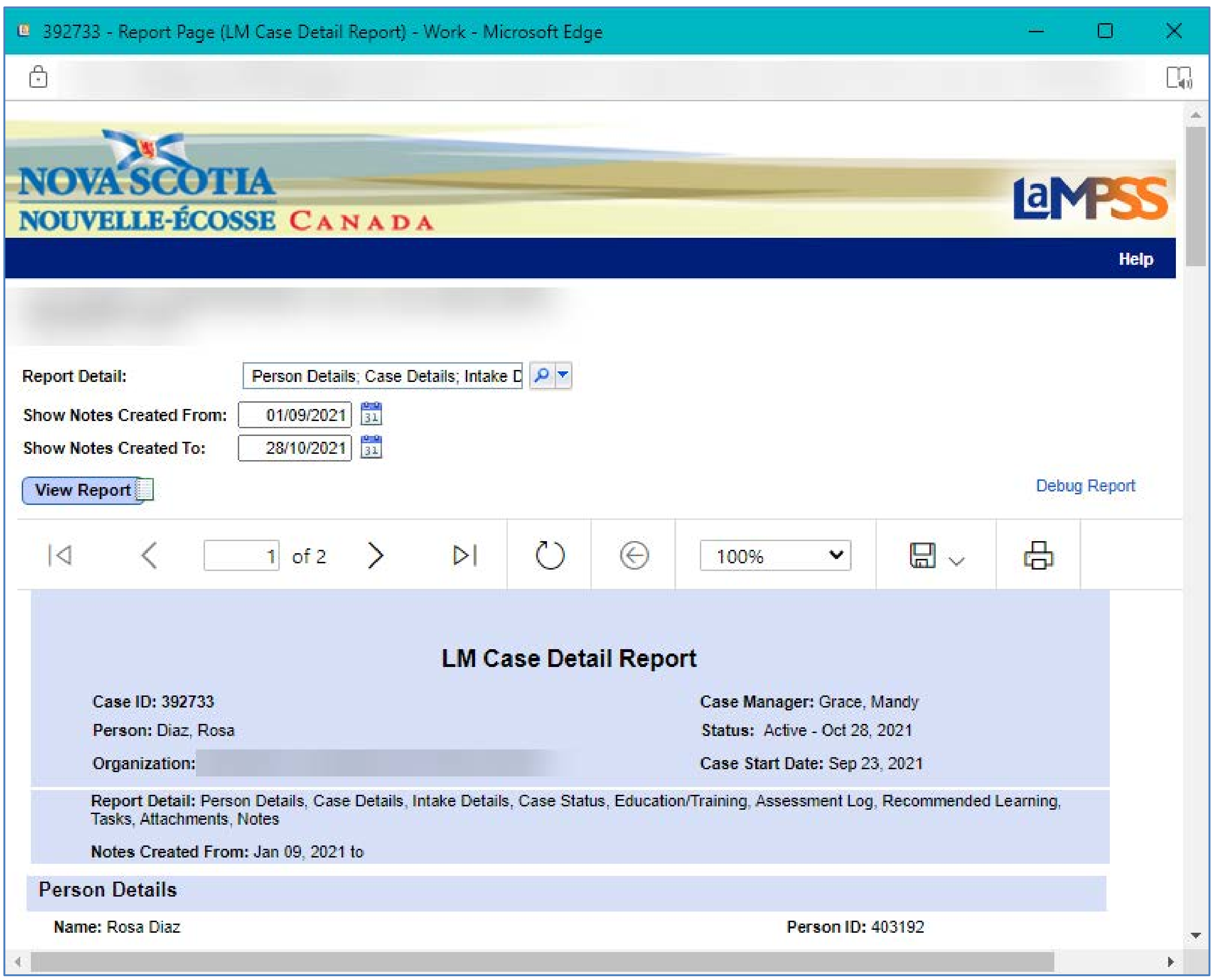
**The LM Case Detail report is launched from the left navigation menu of a case.** It is a way to quickly pull all information about a case into a single document which can be viewed, printed, saved, or shared.

**You access the report in the left navigation menu under Reports.**


The report will open in a new window, and you will select parameters to indicate what information you want to be included in the report. Use the drop-down list of all the sections that are available to be included in the report. Select or de-select each section of the report, as desired.




**Click View report to generate the report based on the parameters you enter.**



**At the top of the report, you'll find a toolbar that allows you to page through the report, adjust the size of the view, search the text of the report, and print.** Reports can also be exported in a variety of formats. Use the drop-down list to choose your preferred format.

**The Case Detail Report can include the following sections:**

- **Case Status**
- **Case Details**
- **Person Details**
  - **Contact Information**
  - **Alias**
- **Intake Details**
- **Education/Training**
- **Assessment Log**
- **Recommended Learning**
- **Tasks**
- **Attachments**
- **Notes**

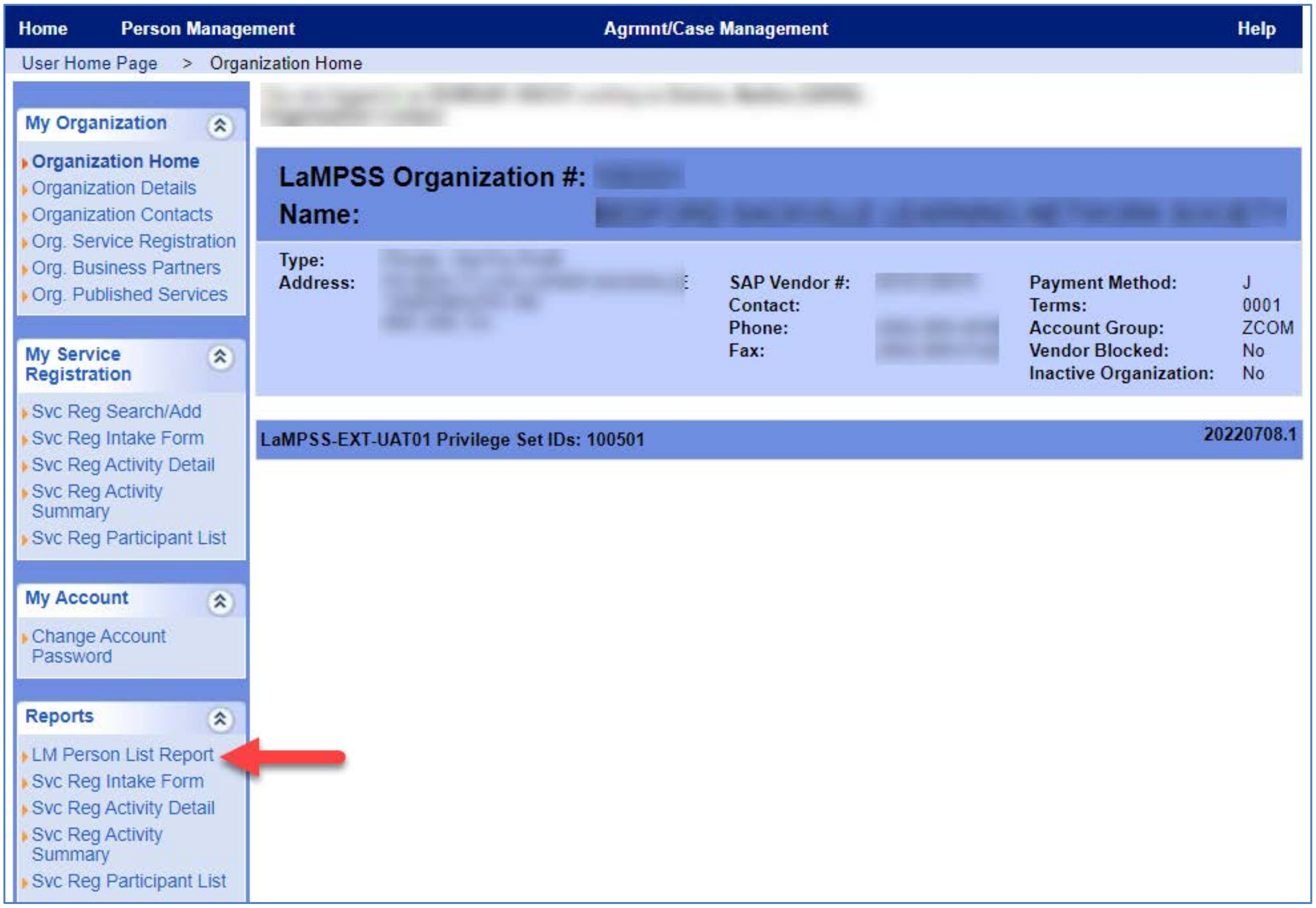

Each section will have information pulled from the related LaMPSS screens and any Case Notes from each screen.

**To change information on the Case Detail Report, you will need to change the information as it appears in LaMPSS and then re-generate the report.**

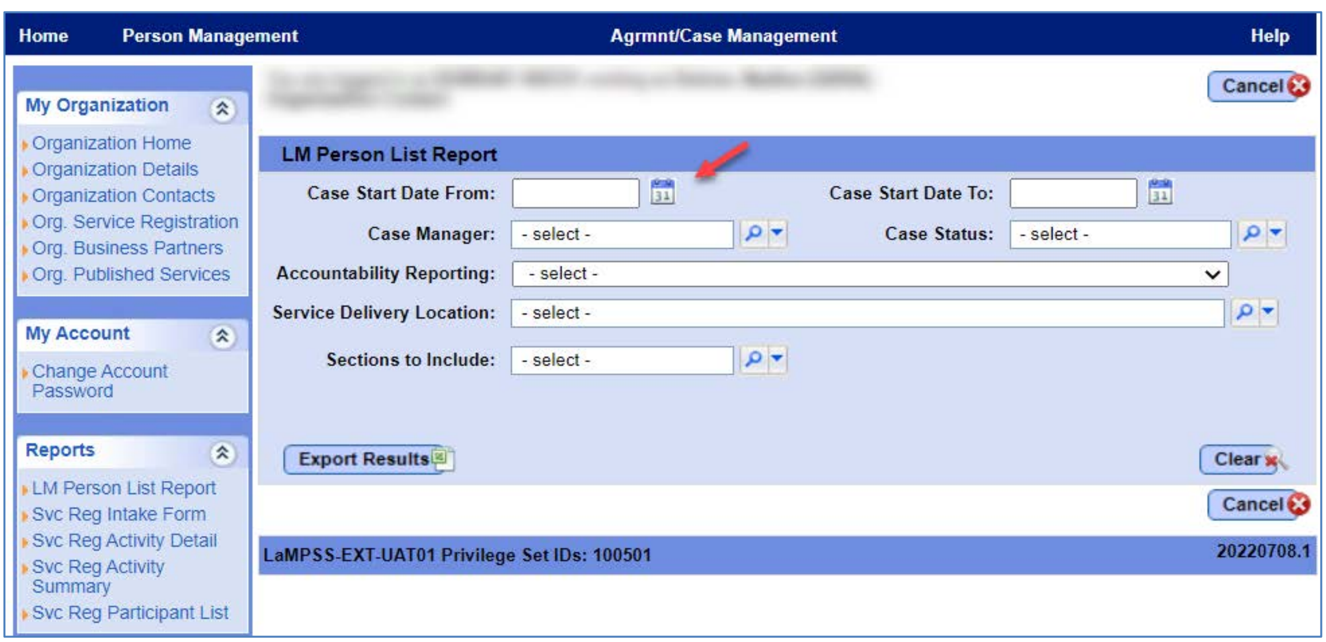
## 9.7 LM Person List Report

**The LM Person List report is launched from the left navigation menu of the organizations home page.** This report will allow service provides to provide person and case related information for their organization. Based on the specific search criteria, the results will be exported to Excel.

**You access the report in the left navigation menu under Reports.**



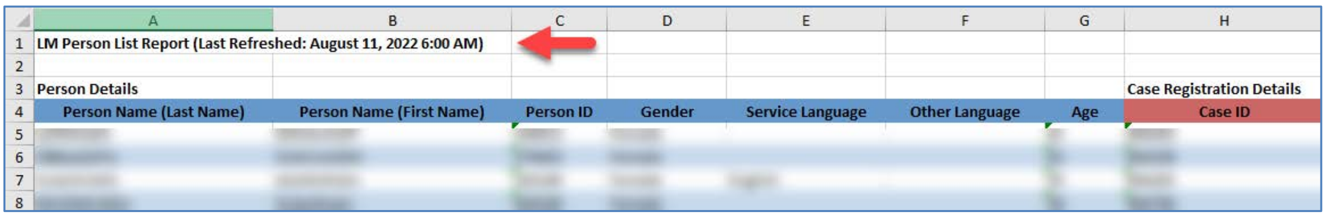

The LM Person List Report will appear, and you will select parameters to indicate what information you want to be included in the report. Use the drop-down list of all the sections that are available to be included in the report. Select or de-select each section of the report, as desired.



**Click Export Results to generate the report based on the parameters you enter.** This will redirect you to an external Excel spreadsheet.

A few items to note when selecting the parameters on the LM Person List Report:

- The Person Details and Case Registration Details sections will automatically be included in the exported results.
- All other fields are required before you can export the results into an excel spreadsheet.
- The number of days between the Case Start Date From and Case Start Date To must not exceed 1095 days (3 years).



| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | LM Person List Report (Last Refreshed: August 11, 2022 6:00 AM) | | | | | | | |
| 2 | | | | | | | | |
| 3 | Person Details | | | | | | | Case Registration Details |
| 4 | Person Name (Last Name) | Person Name (First Name) | Person ID | Gender | Service Language | Other Language | Age | Case ID |
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |
| 8 | | | | | | | | |

**In the top left-hand corner, the date and time for the data in the Exported Report.** The data is refreshed two times a day.

If the following parameters were selected for the Exported Results, please note what results are displayed:

- Case Intake Details - Displays the latest completed intake details.
- Assessments - Displays the last five completed assessments.
- Recommended Learnings - Displays the last three recommended learnings that are either in **Recommended** or **In Progress** status.
- Associated NSSAL Services - Displays the latest service related to the client.
- Referrals - Displays the latest referral on file.