

Import Participants from Another Service

How to Search and Add Participants explained how to search for and add participants one-by-one. You can also bulk import the participants from another service offered by your organization. The steps to search for and select participants to import are detailed in this section.



This feature can be used to save time and effort when a similar group of participants needs to be registered in another service. It eliminates the need to individually search for each participant, allowing multiple participants to be registered at the same time.

To access the Import screen, select the Import Participants button on the Service Participants screen. The Import Participant Service Search will display.

The screenshot shows the 'Service Participants' interface. At the top, there are search filters for Participant, Person ID, Case ID, Email, and Status (set to 'Registered'). Below the filters is a table with columns: Participant, Person ID, Case ID, Contact Info, Intake / Outcome, and Status. Two participants are listed:

Participant	Person ID	Case ID	Contact Info	Intake / Outcome	Status
<input type="checkbox"/> bCzPCgnDEo, DUxANpiWRT	485711			Intake: Completed Outcome: Pending	Registered
<input type="checkbox"/> DZhHCjGgHI, fkOUwhyMpD	553385			Intake: Completed Outcome: Pending	Registered

Below the table, it says 'Displaying records 1 - 9 of 9'. At the bottom, there are three buttons: 'Remove' (with a minus sign), 'Register Participant' (with a plus sign), and 'Import Participants' (with a group of people icon). The 'Import Participants' button is circled in red. To the right of these buttons are 'Save' (with a checkmark) and 'Cancel' (with an X).

Select Import Participant Search Criteria

The import screen enables you to search for existing services as the source of participants to be imported.

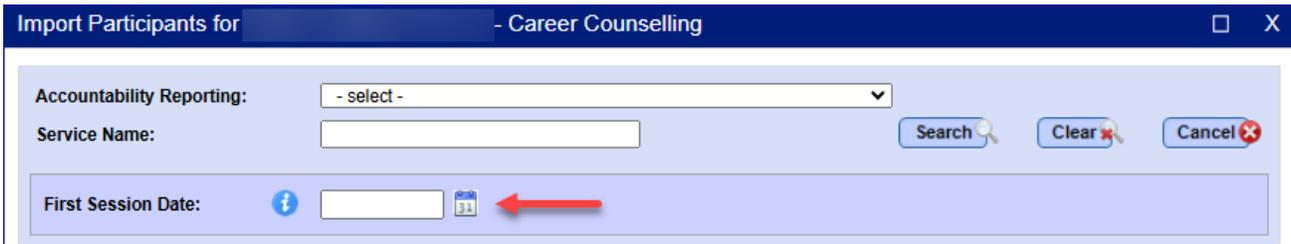
You can search by Accountability Reporting (i.e. funding agreement) and/or Service Name.

Accountability Reporting is a dropdown menu displaying a list of funding agreements for your organization, while Service Name is a text field where all or part of a scheduled service name can be entered.

For Individual and Continuous services, you will also need to enter a First Session Date.



This date will not affect the search results; however, it will be used to register the selected participants in the service, so the dates do not need to be entered manually for every participant. If the date is incorrect, you will need to update all participants who were imported.



Import Participants for - Career Counselling

Accountability Reporting: - select -

Service Name: [text input] Search Clear Cancel

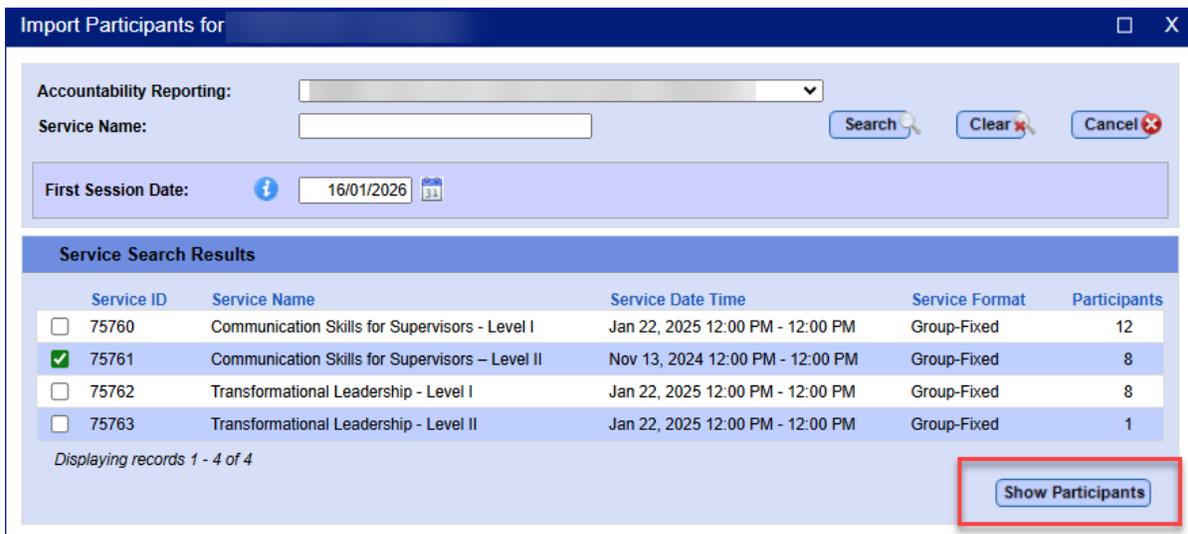
First Session Date: [calendar icon] [text input] [calendar icon] ←

Review and Select Service(s)

The Service Search Results section of the Import Participant pop-up displays the results of the search. If no matches are found, a “No services found” message will display.

The list will display 30 rows per page. Results are sorted by the Service Name and the date/time. You can change the sort order of the row by clicking on any of the column headings or further refine your search criteria.

An example of the search results is pictured here:



Import Participants for

Accountability Reporting: [dropdown]

Service Name: [text input] Search Clear Cancel

First Session Date: [calendar icon] 16/01/2026 [calendar icon]

Service Search Results

Service ID	Service Name	Service Date Time	Service Format	Participants
<input type="checkbox"/> 75760	Communication Skills for Supervisors - Level I	Jan 22, 2025 12:00 PM - 12:00 PM	Group-Fixed	12
<input checked="" type="checkbox"/> 75761	Communication Skills for Supervisors – Level II	Nov 13, 2024 12:00 PM - 12:00 PM	Group-Fixed	8
<input type="checkbox"/> 75762	Transformational Leadership - Level I	Jan 22, 2025 12:00 PM - 12:00 PM	Group-Fixed	8
<input type="checkbox"/> 75763	Transformational Leadership - Level II	Jan 22, 2025 12:00 PM - 12:00 PM	Group-Fixed	1

Displaying records 1 - 4 of 4

Show Participants

One or multiple services can be selected before clicking Show Participants. Once you click the Show Participants button another section will appear at the bottom of the window to display the list of Service Participants.

Select and Register Participant(s)

In the list of Service Participants, you will see the Person ID, Case ID (if applicable), Name and a column for potential warnings or errors related to the participant. See [Import Participant Warnings and Errors](#).

Service Search Results				
Service ID	Service Name	Service Date Time	Service Format	Participants
<input type="checkbox"/>	75760	Communication Skills for Supervisors - Level I		
<input checked="" type="checkbox"/>	75761	Communication Skills for Supervisors – Level II		
<input type="checkbox"/>	75762	Transformational Leadership - Level I		
<input type="checkbox"/>	75763	Transformational Leadership - Level II		
Displaying records 1 - 4 of 4				

Select the checkboxes beside any participant(s) to import.

There may be multiple pages of participants. The import will capture participants checked off on all pages.

Service Participants				
Person ID	Case ID	Name	Warnings and Errors	
<input type="checkbox"/>	167359	QeYNtyKLEZ, NsxJKDbnas		
<input type="checkbox"/>	361333	wgjYyWJDwi, RJrxQwnCct		
<input checked="" type="checkbox"/>	510465	doauxChEAx, AbqfIxMAYd		
<input checked="" type="checkbox"/>	552104	cwCHygHvdh, eqdBibQBuv		
<input checked="" type="checkbox"/>	552106	AzkDnCIPrp, JnybOQxXit		

This list will display up to 30 results per page, sorted by the participant’s last name, then first name. Once again, you can change the sort order by clicking on a column heading.

Using the checkboxes, you can select the participants to register in the service.

Once you have selected all desired participants, you need to select a Registration Type from the dropdown menu.

The options are to only register the participant(s), or to register and also copy any available intake information (see [How to Update the Service Participant Intake-Outcome](#) for more details on intake information)

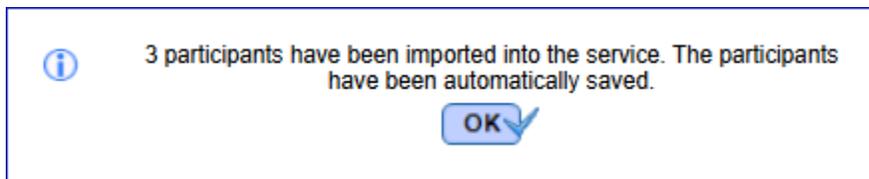
Service Participants				
<input type="checkbox"/>	Person ID	Case ID	Name	Warnings and Errors
<input type="checkbox"/>	167359		QeYNtyKLEZ, NsxJKDbnas	
<input type="checkbox"/>	361333		wgjYyWJDwi, RJrxQwnCct	
<input checked="" type="checkbox"/>	510465		doauxChEAx, AbqfloxMAYd	
<input checked="" type="checkbox"/>	552104		cwCHyghVrdh, eqdBibQBuv	
<input checked="" type="checkbox"/>	552106		AzkDnClPrp, JnybOOxXit	
<input type="checkbox"/>	552110		hydHNYswot, eFxVbGMEvL	
<input type="checkbox"/>	552111		dfNbhvUwib, hljQmEFKy	
<input type="checkbox"/>	552117		cvPMUrjPub, USBVQJcFss	
<input type="checkbox"/>	552118		RVdeBqKJO, ATTAObemqf	
<input type="checkbox"/>	552123		gRAbebTBOH, wjUGPrKofM	
<input type="checkbox"/>	560603		- select -	
<input type="checkbox"/>	560608		Register Only	

Displaying records 1

Registration Type: - select -

Register Participants

Once the Registration Type is selected click Register Participants. The selected participants will be added, and a confirmation message will be displayed.



Click OK, and you will be returned to the Service Participants list, showing the added participant(s).

For Individual and Continuous services, a Session will also be added with the first session date indicated in the import.

Import Participant Warnings and Errors

With the in-depth functionality and many possible scenarios included in the import participants functionality comes a wide range of possible warning and errors message you may encounter, depending on the situation.

LaMPSS will not display a selection checkbox in the import popup for a participant that does not meet the necessary conditions for the service.

The requirements will change depending on what is required under your funding program.

Examples of this include:

- The person is already registered in the Group (Fixed) service or is registered and has not been completed in a Group (Continuous) or Individual service.
- The person is Private and must first be shared with the government

- A Case ID is required – an active case must exist for the person to allow registration
- SIN is required – a Social Insurance Number must be entered for the person to allow registration

An error message will appear in red text in the Service Participant list, as seen below. Note the selection checkbox is hidden.

Service Participants				
<input type="checkbox"/>	Person ID	Case ID	Name	Warnings and Errors
	348858		Smith, Joe	This person is already registered in this service.
	348859		Johns, Jessica	This person is already registered in this service.
	348860		Smith, Mary	This person is already registered in this service.
<input type="checkbox"/>	348861		Gallant, Betts	

Displaying records 1 - 4 of 4

Another possible error is when there is not enough room in the Group (Fixed) service for the number of participants you have selected to import. There are multiple ways to resolve this error:

- If it's possible to increase the maximum participants, exit out of the import popup and follow the steps outlined earlier in this guide to change the Service Details.
- Alternately, deselect enough participants to bring the total number of participants down to the maximum. The error message will tell you how many participants you must deselect.

Import Participants for [Close]

Errors:

- Room exists for 2 participant(s) and you have selected 6. Please deselect at least 4 participant(s).

Accountability Reporting:

Service Name: [Search] [Clear] [Cancel]

Finally, LaMPSS will display a warning when one of the selected participants has already been registered in the service, when the Service Type is Individual or Group (Continuous).

It is only a warning, not an error, because participants can be registered more than once. LaMPSS will display a popup warning to confirm you want to register the participant in the service again.