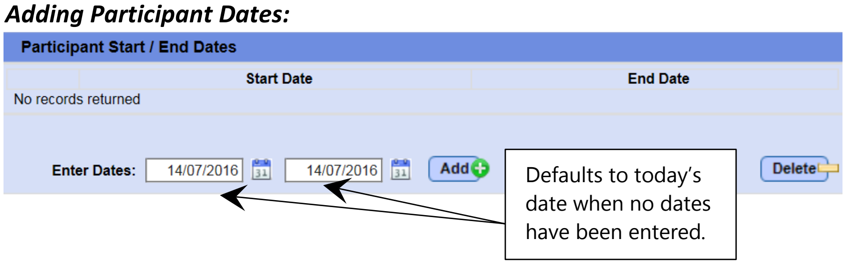
SERVICE FORMAT CHANGES

Previous Release	Release 2.10.3
We had two Service Formats which included: 1) Group 2) Individual	***We introduced a third Service Format and renamed the existing "Group" format:*** 1) Group-Continuous *(New)* 2) ~~Group~~ Group-Fixed *(Renamed)* 3) Individual
Service Start and End Dates were: 1) Required for Group services 2) Not able to be entered for Individual services	***Service Start and End Dates are:*** 1) Required for Group-Continuous services *(New)* 2) Required for Group-Fixed services 3) Optional for Individual services *(New)*

1) **Group-Continuous** - A new **Service Format** called **"Group-Continuous"** was added for group services that have a continuous intake and a new section was added to the **Service Registration Activity Summary Report** for this new format. The "Group-Continuous" format includes the ability to enter different start and end dates for each participant enrolled in the same service and is useful for programs that allow clients to begin or end at any point during the service period. This service format can also be used for services where clients may enter a service, leave and then return to the service at a later date.

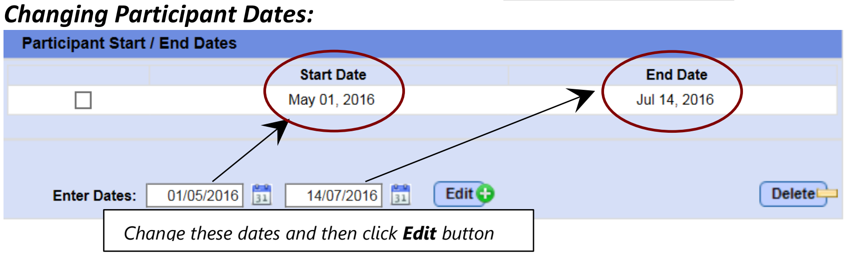
   Participant Start and End Dates are entered on the Additional Information page, which is the same page used to change the Participant Status. Only one set of dates can be entered for each participant, but these dates can be edited or deleted, if required.

   Adding Participant Dates:



To add dates, enter the dates in the textboxes OR select dates from the popup calendars and then click the **Add** button.

   Changing Participant Dates:



To change dates, enter new dates in the textboxes OR select dates using the popup calendars and then click the **Edit** button.

   Examples of "Group-Continuous" services:
   - An adult learning program through NSSAL where clients can enter at any point throughout the service period (school year).
   - An employment-type service where multiple clients are employed in the same service, but start and end their employment at different times.

2) **Group-Fixed –** The existing **"Group"** Service Format was renamed to **"Group-Fixed"** and all existing **"Group"** services were automatically converted to **"Group-Fixed"**. This service format is useful for services that have a defined start and end date with the expectation that the client is a participant from the beginning until the end of the service.

   Examples of "Group-Fixed" services:
   - A week-long Resume Writing Workshop
   - A 6-week Skill Building Workshop
   - A 2-hour Job Search Workshop

3) **Individual** – This service format is useful for one-on-one services where the service provider may want to account for individual appointments or sessions. The ability to enter **Service Start/End Dates** when adding or copying **"Individual"** services was added in this Release, with these dates being optional.

Examples of "Individual" services:

- A one-on-one Career Exploration session
- An individual assessment service

***** Service Providers should confer with their business area lead to determine how to use the new service format for your programming. Please see the Service Format Characteristics Chart on Page 6 for further clarification.***

SEARCH PARAMETER CHANGES

Previous Release	Release 2.10.3
The Accountability Reporting search parameter on the Search/Add page: 1) Displayed all active agreements in the dropdown list, which included agreements that do not yet have any services. ***Agreements that do not have any services will not return any search results, so they do not need to be available as search parameters.*** 2) Excluded closed agreements from the dropdown list, ***which means users had no way to search for services that were accountable to closed agreements.***	***The Accountability Reporting search parameter on the Search/Add page now:*** 1) Displays only those agreements that have existing services and excludes agreements that do not currently have any services. ***An agreement will be added to this dropdown list when its first service is created.*** 2) Includes closed agreement in the dropdown list and includes the **Agreement Status** in the dropdown list format ***so users can search for services accountable to closed agreements.*** **Dropdown sort/group:** a) Private displayed first, when applicable b) Grouped by Agreement Status with "Active" before "Closed" c) Sorted by Agreement Start Date, then Program(Dept/Area), then Agreement End Date, then Agreement ID
The Service Type search parameter on the Search/Add page: 1) Displayed the full list of all **Service Types** available in the LaMPSS Service Type Framework. ***Service Types that do not have any services will not return any search results, so they do not need to be available as search parameters.***	***The Service Type search parameter on the Search/Add page now:*** 1) Displays only those **Service Types** that have existing services and excludes Service Types that do not currently have any services. ***A Service Type will added to this dropdown list the first time it is selected for a service.*** 2) Further filters by selections made in the **Service Format** and **Accountability Reporting** dropdown lists.

Accountability Reporting Search Parameters - Search/Add:

The changes made to this screen make it easier to search for and add/copy services. The previous release displayed agreements that do not have services and did not display any closed agreements. This created confusion for service providers. This change now includes both open and closed agreements, but only shows those agreements that have services attached to them. Once you add a service to a new agreement, it will then appear in the search dropdown list. The current status of the agreement was also added to the dropdown list to make it easier to choose the correct agreement.

The Service Type selection box will filter the different service types based on the services enabled for the agreement selected under Accountability Reporting.

Service Type Search Parameters – Search/Add page:

Filtering is further improved on the search page by showing only service types that have existing services. Once a new service type is added, it will then show in the search dropdown list. For example, if you are searching for services and only have existing services that are "Group–Continuous" and "Group-Fixed", you will not return any results for "Individual" services.

Participant Counts:

The **Participant count** on the Search/Add page and the **Participant Enrolled** count on the Details page and the Participants page are now displayed for all service formats instead of just "Group" services. The **Participant** count is a count of all participants enrolled in the service that have a status of: "Completed", "Pre-Registered", "Registered" and "Wait List". Participants with a status of "Cancelled", "Did Not Complete", "No Show", or "Rescheduled" are excluded from this count.

VIEWING/ADDING/COPYING SERVICES

Previous Release	Release 2.10.3
The Accountability Reporting field on the Details page: 1) Did not display anything when viewing a service that was accountable to a closed agreement. 2) Did not include the Agreement Status in the field format.	***The Accountability Reporting field on the Details page now:*** 1) Displays the accountable agreement when viewing a service that is accountable to a closed agreement. 2) Includes the **Agreement Status** in the accountability reporting field format.
The Copy to New button: 1) Allowed users to copy an existing service to a closed agreement (bug). 2) Did not allow users to copy an existing service from one agreement to another.	***The Copy to New button now:*** 1) Prevents users from copying an existing service to a closed agreement. 2) Allows users to copy an existing service from one agreement to another by allowing the user to select the agreement from the dropdown list, which includes only active agreements.

Accountability Reporting – Details page:

1. **Viewing Existing Services** - This page now shows the agreement details when the user is viewing a service that is under a closed agreement. Also when viewing service details, the current agreement status is now shown to ensure there is no confusion between viewing closed and active agreements. *Note: The accountability reporting field is read-only and cannot be changed on existing services.*
2. **Adding New Service** – The improvements made to this page allows users to view services that are under closed agreements but prevents users from adding new services to closed agreements. When adding a new service, the accountability dropdown list includes only active agreements for the user to select.

Copy to New Function

The changes to the **Copy to New** function now prevents users from accidentally copying services to closed agreements. This improvement also allows users to copy services from one agreement to another active agreement. Previously, users were not able to change the agreement when copying a service which made adding the same services to the new agreements labour intensive.

The **Add New Service** block at the bottom of the Search Results page has two functions: one to add a new service and another to copy existing information to a new service. These functions are grouped together but work independently.

To use the **Add a New Service** function, you will select the service format from the dropdown and then click the **Add Another** button. This will take you to the Service Registration Details page where you can configure the new service.

To use the **Copy to New** function, you will select the service by checking a checkbox and then click the **Copy to New** button. This will take you to the Service Registration Details page where you can select the correct Accountability Reporting agreement. The service information will be carried over to this page. ***Note:*** *Only one service can be copied at a time*.

REGISTRATION USABILITY

Previous Release	Release 2.10.3
The **Remove** button on the Participants page allowed users to remove only one participant at a time from the service.	The **Remove** button on the Participants page now allow users to remove multiple participants at a time from the service.
The process for Registration may have been unclear due to the following: 1) The **Person Search / Add** section of the Participants page did not actually add persons. 2) It was not immediately clear which button registered a participant and which button pre-registered a participant. 3) The Participant popup pages did not include any warning/explanation about "Pre-Registration".	***The following changes were made to enhance the usability of registration:*** 1) The **Person Search/Add** section of the Participants page was changed to **Search/Register** and the **Search Results** section was changed to **Search Results/Register.** The **Search/Add** button was changed to **Search** and a tool-tip added explaining that an exact match on Case ID or SIN will register a participant without displaying search results. 2) The **+ icon** was replaced with a **Register** button and the **Add New Participant** button was changed to **Pre-Register Participant.** A hover over message was added to the **Pre-Register Participant** button explaining the purpose of "Pre-Registration". 3) A **warning message** was added to the Participant popup page to remind users that registration is not complete. This message is always shown on the popup page, but will only display on the Additional Information page, if the participant registration started as "Pre-Registered". If the participant was never "Pre-Registered", the message is not displayed.
The Additional Information page: 1) Allowed users to enter session dates and complete Additional Information questions for "Pre-Registered" participants. Since these "Pre-Registered" records cannot be converted to "Registered", the user then had to re-enter this info again once the person is added to LaMPSS. 2) Included only "Yes/No" as responses for the Y/N questions.	***The Additional Information page will:*** 1) Only allows users to enter session information, participant dates and complete additional information questions for "Registered" participants. These fields are disabled for "Pre-Registered" participants. 2) Includes "Yes/No/Not Provided" as responses for the Y/N questions.
The purpose of the **Copy Existing** button on the Additional Information page button was not clear to users.	The **Copy Existing** button was changed to **Copy Previous Intake** and the button is displayed only when the participant has a previous intake under the same program that is available to copy. This function pulls the intake information from the most recently updated Intake. This is important to note, if the client is registered in more than one service under the same program.

SERVICE REGISTRATION REPORTS

Service Registration Intake Form

The **Service Registration Intake Form** report parameter dropdown list for **Accountability Reporting** now includes the Program(Dept/Area).

Service Registration Activity Summary Report

The **Service Registration Activity Summary Report** has a new section for the "Group-Continuous" service format.

Service Registration Participant List Report

A new **Service Registration Participant List Report** is now available which allows users to generate a list of participants which includes contact information based on the parameters entered. To run the report for a specific service, the Service ID must be entered. When running the report for a specific service using the Service ID, all other service-related report parameters are ignored (including Service Type, Service Format, Contact Person, Service Dates, Service Status, and Accountability Reporting) but the report can still be filtered using the participant parameters (including Person Visibility, Gender, Age Range, Marital Status, Language Preference and Participant Status). This means that users can run a report that lists everyone in a specific service, or filter the report to show only those participants who are single or those that are "Completed" or those within an age range, etc.

Service Registration Participant List Report

Organization: ISANS IMMIGRANT SERVICES ASSOCIATION OF NOVA SCOTIA	**Service ID:** 22510
Person Visibility:	**Service Type:**
Gender:	**Service Format:**
Age Range: 0 to 100	**Contact Person:**
Marital Status:	**Service Date Range: To:**
Participant Status:	**Service Status:**
Language Preference:	**Accountability Reporting:**

Person ID	Participant	Gender	Age	Marital Status	Phone	Email	Address	City	Prov	Postal Code	Language Preference	Person Visibility
194923	bqUBEFSZtt, gzQektVhpc	Female	26		(902) 444-5555		123 Main Street	Halifax	Nova Scotia	B2X 3H6	English	Shared
117749	chiHcDYYjy, dDGecQdqYx	Male	31	Single	(902) 444-5555		PO Box 12345	Halifax	Nova Scotia	B2B 2B2	English	Shared

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Characteristics	Group-Continuous	Group-Fixed	Individual
Description	A service that is delivered to a group of clients. The service has a start and end date and registration is ongoing (open). Participants may start and end the service at different times.	A service that is delivered to a group of clients. The service has a start and end date and registration is fixed (closed). All participants start and end the service at the same time and do not have individual start/end dates.	A service that is delivered to an individual. The service is Intended for a short number of appointments (3-4 average) where attendance/session tracking is required.
Example	*An employment-type service where multiple clients are employed in the same service, but start and end their employment at different times.*	*A Career Centre offering a Job Search workshop for a maximum of 20 clients. Workshop is scheduled to run on Mondays from 4:00-6:00 PM for 6 weeks.*	*A Career Centre offering one-on-one Career Counselling sessions to individual clients.*
Delivery	One-to-Many	One-to-Many	One-to-One
Intake Timeframe	Continuous	Fixed	Continuous
Service Types (PPC)	Service Types Available (Group)	Service Types Available (Group)	Service Types Available (Indiv)
Service Dates	**Required**	**Required**	**Optional**
Service Times	*Not available*	**Required**	*Not available*
Session Dates (Attendance)	*Not available*	*Not available*	**Required to change Participant status to "Completed"** Multiple session dates can be entered
Participant Start and End Dates	**Required to change Participant status to "Completed"** Only one set of start/end dates per participant	*Not available*	*Not available*
Reporting	Participant Start Date Participant End Date	Service Start Date Service End Date	First Session Date Last Session Date
Participants Enrolled	*Count displayed*	*Count displayed*	*Count displayed*
Min/Max Participants	*Not available*	**Required**	*Not available*
Wait List	*Not available*	Add participants to the Wait List, if max participants exceeded Wait List displayed on Participants page	*Not available*