

A referral can be initiated at any time during the client's progression. You may need to complete a referral to refer a client to another organization that offers the programs needed for the client to achieve their goals.

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

REFERRALS SCREEN

There are three types of referrals you may capture within LaMPSS on the Referrals screen, which is located at the bottom of the Case Actions section in the left navigation menu.

Case Transfer

- This type of referral can be used to communicate the potential transfer of a client to another organization.
- It will generate an informational email to advise the new provider of the potential transfer. They will be able to view the client's person record and a summary of their case.
- The new organization will need to complete the Case Transfer by re-assigning the case to their Organization and Case Manager.

Informational (within LaMPSS)

- Used when referring the client for services at another organization delivering External Case Management (ECM) programs, but where your organization continues to manage the client's case.

Informational (outside LaMPSS)

- Used when referring the client for services to an organization outside of the External Case Management (ECM) programs and your organization continues to manage the client's case.
- If the client is being referred outside of the External Case Management (ECM) programs 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.

Home Person Management Agrmnt/Case Management Help

User Home Page > Case Home Page > Referrals

Save ✓ Cancel ✗

Case ID: [redacted]

Program: ECM(LSI-ENS)
Case Manager: [redacted]
Office: [redacted]

Referrals

Add Referral + Referral Type: - select -

Save ✓ Cancel ✗

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Use the Referrals screen to capture any referrals for the client

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

Referrals

Add Referral + Referral Type: - select -

- select -
Case Transfer
Informational (within LaMPSS)
Informational (outside LaMPSS)

Save ✓ Cancel ✗

LaMPSS-EXT-FT02 Privilege Set IDs: 1003

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

Referrals

Referral Type: Informational (within LaMPSS) Status: Draft

Referral Date: [redacted]

Organization: - select -

Contact Name: [redacted]

Email To: [redacted]

Correspondence Template: - select -

Correspondence Language: English

Email Subject: [redacted]

Email Content: [redacted]

Submit Referral ✓ Cancel Referral -

Follow best practices for email and privacy. Do not provide personal information about the client.

For each referral you will provide:

- **Organization** – The organization that will receive the referral. For Case Transfers or Informational (within LaMPSS) referrals this will be a drop-down list. Only organizations with an active OFA with an ECM program enabled and with client tracking enabled will be listed in the Organization drop down list. When the referral type is “Informational (Outside of LaMPSS)” the user can type the Organization in a text box.
- **Contact Name** – The contact’s name at the receiving organization whom the referral is being sent to.
- **Email To** – The email address of the contact. When an organization is selected from the drop-down list this will default to the organization’s general contact email (Email address listed under Organization Details).
- **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.

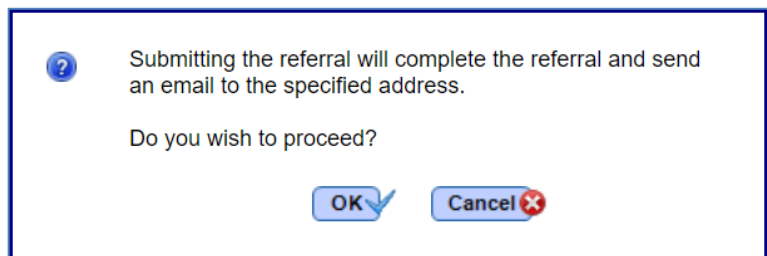


If you plan to select French, select the Correspondence Language first (i.e., before anything else) as changing the language will overwrite any edits already made.

- **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 referral. **Click OK to complete the referral.**

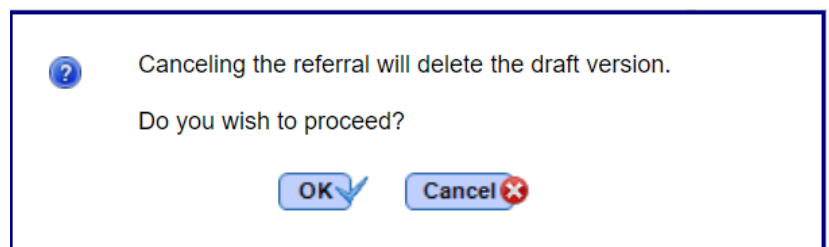


Once you select OK, LaMPSS will also process the Referral Correspondence for this referral, sending the letter as an email attachment to the specified contact.



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 referral details are listed on the Referrals screen. The Add Referral button will continue to be available for future referrals that may be required.

The screenshot shows the 'Referrals' section of the LaMPSS Case Management system. A red box highlights the instruction: "Select a Referral Type and click Add Referral to add additional referrals". The interface includes a navigation menu on the left, a top navigation bar, and a main content area with fields for Case ID, Program, Case Manager, Office, and Referrals. The Referrals section shows a table with columns for Referral Type, Referral Date, and Organization. A red box highlights the instruction: "Select a Referral Type and click Add Referral to add additional referrals".

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 screenshot shows the expanded view of a referral. The details include: Referral Type: Informational (within LaMPSS); Referral Date: Sep 06, 2022; Organization: [Redacted]; Contact Name: [Redacted]; Email To: [Redacted]; Correspondence Template: NSW Referral - Informational within NSW Network; Correspondence Language: English; Email Subject: NSW Client Referral - -- Programs, Services and Interventions; Email Content: Please see the attached referral letter about one of our clients who may benefit from your programs, services, or interventions. A 'Preview' button is visible next to the email content.

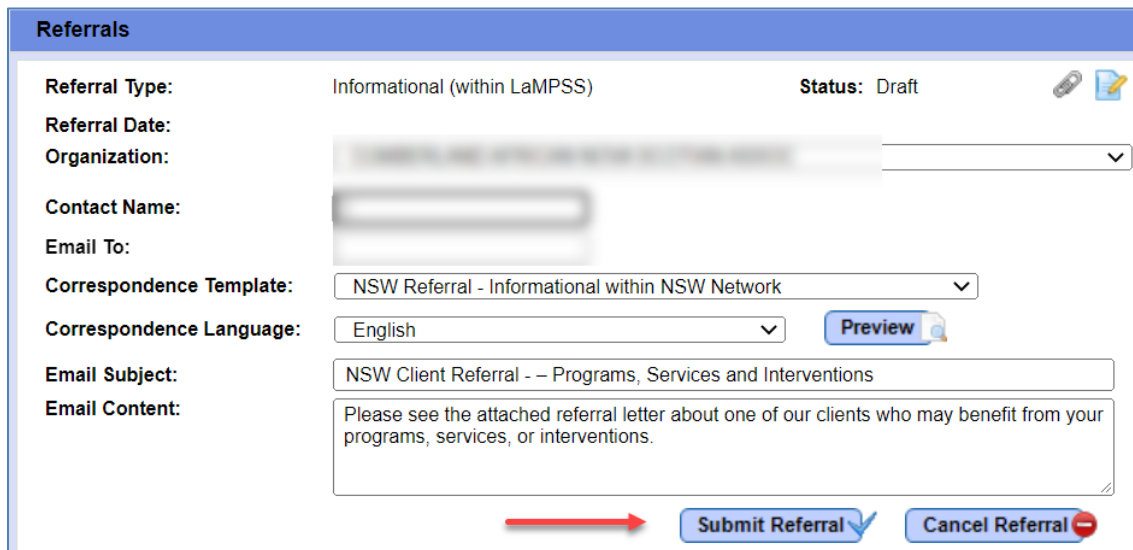
The next sections will look at each Referral Type in more detail, as well as the system-generated referral correspondence.

INFORMATIONAL REFERRAL WITHIN LAMPSS


This type of referral is used when referring a client for services at another ECM organization, but where your organization continues to manage the client’s case.

 To communicate the potential transfer of a client to another ECM organization, complete a [Case Transfer](#) instead.

The Organization drop-down list will default to a list of organizations with active ECM agreements. You will select the desired organization from the list. This will automatically populate the Email To field with the organization’s general contact email address from LaMPSS.



Once you’ve selected an organization, ensure you also select the Correspondence Template for “NSW Referral – Informational within NSW 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.

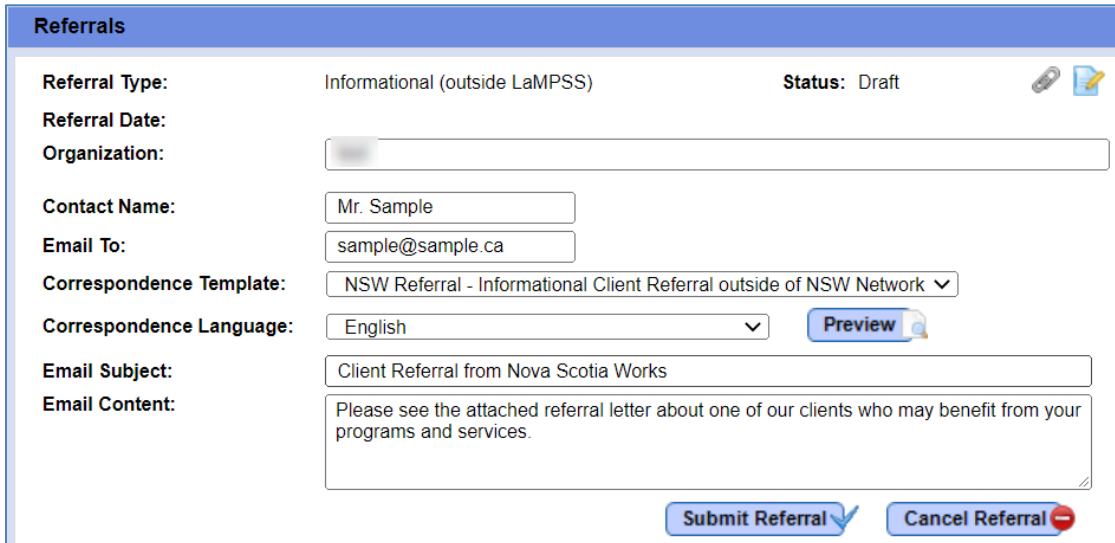
 Avoid including any personal information or sensitive details in the Email Subject or Content

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 client’s personal story, education history, etc. The referral process in LaMPSS is designed to notify the organization about the referral and add the client’s person record to their organizational context. You may then choose to contact the organization to ensure they are aware of the referral and discuss/clarify applicable details about the client.

REFERRAL TO AN ORGANIZATION OUTSIDE OF LAMPSS

This type of referral is used when referring the client for services at an organization not delivering ECM programs. Your organization may continue to manage the client’s case.


The Organization field is free text for you to enter the name of the organization where you will refer the client. You will also need to complete the Contact Name and Email To fields with the appropriate information.



The screenshot shows a web form titled "Referrals". The form includes the following fields and options:

- Referral Type:** Informational (outside LaMPSS)
- Status:** Draft
- Referral Date:** (empty field)
- Organization:** (empty text box)
- Contact Name:** Mr. Sample
- Email To:** sample@sample.ca
- Correspondence Template:** NSW Referral - Informational Client Referral outside of NSW Network (dropdown menu)
- Correspondence Language:** English (dropdown menu)
- Preview:** (button)
- Email Subject:** Client Referral from Nova Scotia Works
- Email Content:** Please see the attached referral letter about one of our clients who may benefit from your programs and services.
- Submit Referral:** (button)
- Cancel Referral:** (button)

Once you’ve entered an organization, ensure you also select the Correspondence Template for “NSW Referral – Informational Client Referral outside of NSW 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 or Content.

CASE TRANSFER REFERRAL

This type of referral can be used to communicate the potential transfer of a client to another ECM organization. It will generate an informational email to advise the new provider that the client plans to transfer. That organization will be able to view the client’s person record and a summary of the case.

A Case Transfer will still need to be completed 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 client’s case, except when the case status is “Follow up” and “Closed.”

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

The screenshot shows the 'Referrals' form with the following fields and values:

- Referral Type: Case Transfer
- Status: Draft
- Referral Date: (empty)
- Organization: - select -
- Contact Name: (empty)
- Email To: (empty)
- Correspondence Template: - select -
- Correspondence Language: English
- Email Subject: (empty)
- Email Content: (empty)

Buttons at the bottom: Submit Referral (with a checkmark icon), Cancel Referral (with a red X icon).

Fill out the referral information, selecting the organization from the drop-down list. This will automatically populate the Email To field with the provider's general contact email from LaMPSS.

Once all information has been entered, click Submit Referral.

The screenshot shows the 'Referrals' form with the following fields and values:

- Referral Type: Case Transfer
- Status: Draft
- Referral Date: (empty)
- Organization: (blurred)
- Contact Name: Mr. Sample
- Email To: sample@sample.ca
- Correspondence Template: NSW Referral - Case Transfer within NSW Network
- Correspondence Language: English
- Email Subject: NSW Client Referral - Case Transfer
- Email Content: Please see the attached referral letter describing the possible transfer of a client from our organization to yours.

Buttons at the bottom: Submit Referral (with a checkmark icon), Cancel Referral (with a red X icon), and a Preview button (with a magnifying glass icon).

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

The dialog box contains the following text:

Submitting the referral will complete the referral and send an email to the specified address.

Do you wish to proceed?

Buttons: OK (with a checkmark icon), Cancel (with a red X icon).

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 a potential opportunity to discuss and clarify details about the client.

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.

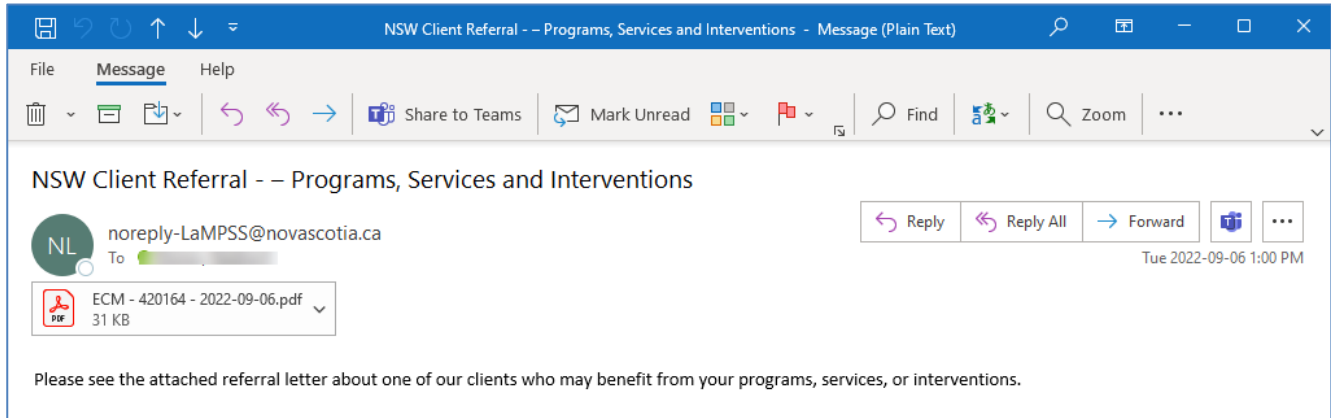
The Preview will launch in a Correspondence Preview Popup window.

The letter for each Referral Type is based on a template setup in LaMPSS by Employment Nova Scotia.

If you believe changes are needed to any of the templates, contact Employment Nova Scotia.

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.



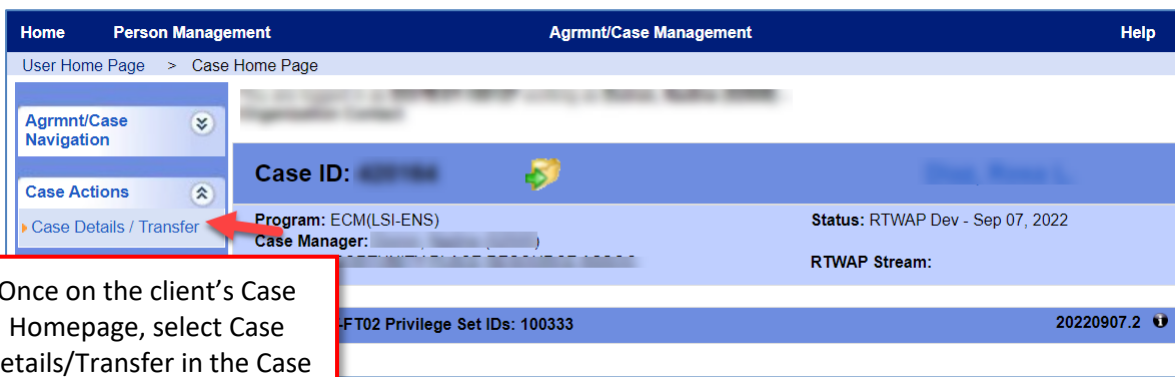
The email is generated from a no-reply address, but the letter includes contact information for your organization. It may take up to 15 minutes for the emailed referral to be sent by LaMPSS.

TRANSFERRING A CASE TO ANOTHER ECM CASE MANAGED PROGRAM

Case Transfer is used to transfer a client from one ECM organization to another. The receiving organization is responsible for completing the case transfer. Once the transfer is complete, the case will be assigned to the new organization. The client may be referred back to the original organization for service participation, but the case becomes managed by the new organization.

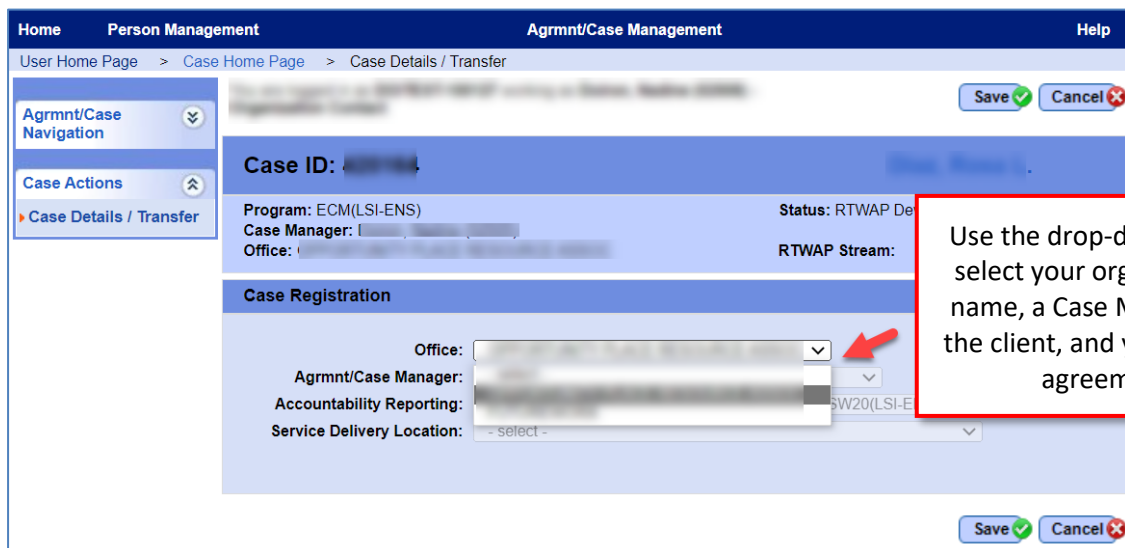
The Case Transfer referral is a way to notify the new organization that the client may engage with them.

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



Once on the client's Case Homepage, select Case Details/Transfer in the Case Actions section of the left navigation menu.

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



Use the drop-down lists to select your organization's name, a Case Manager for the client, and your current agreement

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 Case Manager for this client.
- **Accountability Reporting** – the active agreement for your organization.
- **Service Delivery Location** – the primary location where the client will receive services 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 case will be assigned to the selected staff person.

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

- A task will appear on their User Homepage and a notification on the Case Homepage to make them aware they have received the case for a client. 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 client's Case Manager with the previous organization to inform them the transfer has occurred.

My Notifications							
Due: All Overdue + 1 month Program: -- No Program --; Ed [icon] [input] [search]							
P	Type	Agrmnt/ Case ID	Org/Player	Program	Created By	Due Date	
<input type="checkbox"/>	Info	[redacted]	Diaz, Rosa L.	ECM (LSI-ENS)	DOITEST-100127	Sep 07, 2022	
	Case has been transferred from [redacted] to [redacted]						