



Welcome to LaMPSS Release 2 training on case reporting. This is one of a series of learning events being offered for external service providers to help learn how to use the Release 2 of the LaMPSS solution to perform EAS case management. This session will introduce you to the case reporting features of LaMPSS.

## Agenda

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- Welcome & Objectives
- Case Detail Report
- Person List Report
- Conclusion & Wrap Up

The agenda for this session is seen on this slide.

## Objectives

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- To provide LaMPSS case management users with an overview of case reporting functionality in LaMPSS.
- To learn the purpose of and how to generate the Case Detail Report and Person List Report

The objectives for today's session are seen here. In addition to pointing out some standard features of LaMPSS reporting, we specifically want to discuss the Case Detail Report and Person List Report which will be the two most commonly used reporting features for case managers.

## Agenda

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- Welcome & Objectives
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- Person List Report
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LaMPSS includes functionality to generate real time reports on cases. A 'real time' report contains the most current information in LaMPSS at the time you generate the report. Both of the reports we're about to look at are real time reports.

The first of these reports is called the Case Detail Report.

## Case Detail Report

➤ **A case level report that may include:**

- Person Details
- Case Registration
- Registration Details
- Case Status
- Referral Details
- Case Information
- Additional Case Information
- Education/Training
- Employment History
- Other Skills/Knowledge
- Employment Details

- Needs Determination
- Action Plan Details
- Employment Outcomes
- Tasks
- Attachments
- Notes



The Case Detail Report is a case level report that will be used primarily by Case Managers. When viewing a case, the user can launch a report quickly and easily to capture all details about a specific case.

This may include:

- Person Details
- Case Registration
- Registration Details
- Case Status
- Referral Details
- Case Information
- Additional Case Information
- Education/Training
- Employment History
- Other Skills/Knowledge
- Employment Details
- Needs Determination
- Action Plan Details
- Employment Outcomes

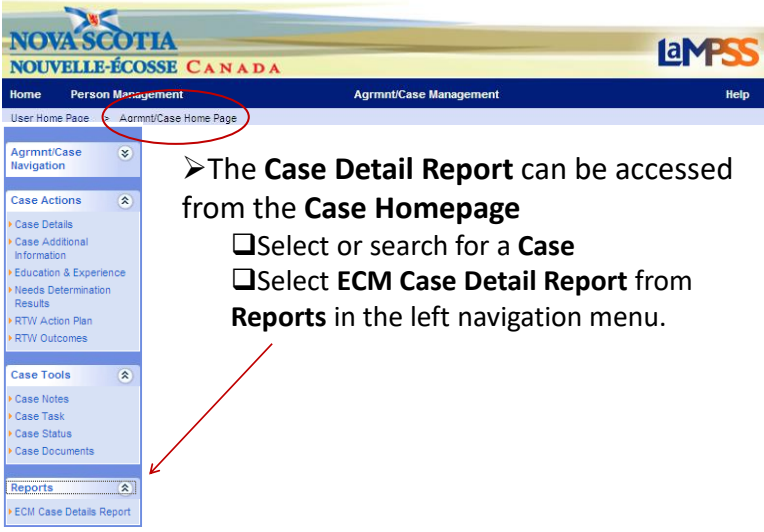
-Tasks

-Attachments

-Notes

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# Accessing the Report



The screenshot shows the laMPSS web application interface. At the top, there is a header with the Nova Scotia logo and the text "NOVA SCOTIA NOUVELLE-ÉCOSSE CANADA". Below this is a navigation bar with "Home", "Person Management", "Agrmnt/Case Management", and "Help". The "Person Management" tab is selected, and a red circle highlights the "Agrmnt/Case Home Page" link in the breadcrumb trail. On the left, there is a navigation menu with sections: "Agrmnt/Case Navigation", "Case Actions" (with sub-items: Case Details, Case Additional Information, Education & Experience, Needs Determination Results, RTW Action Plan, RTW Outcomes), "Case Tools" (with sub-items: Case Notes, Case Task, Case Status, Case Documents), and "Reports" (with sub-item: ECM Case Details Report). A red arrow points from the "ECM Case Details Report" link to the text on the right.

➤ The **Case Detail Report** can be accessed from the **Case Homepage**

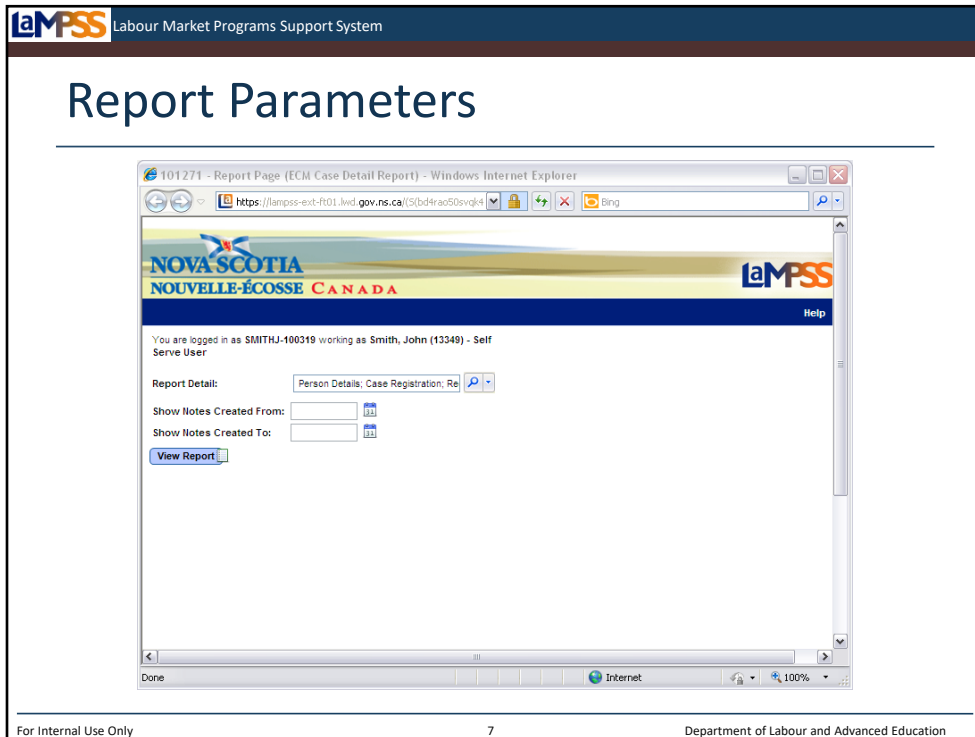
- Select or search for a **Case**
- Select **ECM Case Detail Report** from **Reports** in the left navigation menu.

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The Case Detail Report can be accessed through the reports section of the left navigation menu.

You will need to select or search for a case and then launch the report from the left navigation menu on the case homepage.

This report can only be accessed here, from the case homepage. It will not appear in the left navigation menu from other case screens.



The Case Detail Report will automatically open in a new browser window when you select it from the left navigation menu. You will select your desired parameters for the report and then click the view report button to generate the report.

The first set of parameters you need to select are the report details. You can access a list of all the report details available to be included/excluded in the report by clicking on the pick list icon seen here. The items available in this pick list are all of the sections we reviewed a few moments ago. Select or de-select each section of the report, as desired.

The parameters you select for the report will be “echoed” back at the start of the report underneath the header information.



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## Parameters & Sample Report

NOVA SCOTIA  
NOUVELLE-ÉCOSSE CANADA

laMPSS Help

You are logged in as SMITHJ-100319 working as Smith, John (13349) - Self Serve User

Report Detail: Person Details; Case Registration; Re...

Show Notes Created From: 01/01/2012

Show Notes Created To: 24/01/2012

View Report

1 of 4 100% Find | Next

### Case Detail Report

Case ID: 101271 Case Owner: John Smith  
 Person: Jackson, Jake Status: RTWAP Mgmt - Jan 12, 2012  
 Organization: HALIFAX COMMUNITY LEARNING NETWORK Case Start Date: Jan 05, 2012

Report Details: Person Details, Case Registration, Registration Details, Case Status, Referral Details, Case Information, Additional Case Information, Education/Training, Employment History, Other Skills/Knowledge, Employment Details, Needs Determination, Action Plan Details, Employment Outcomes, Tasks, Attachments, Note

Notes Created From: Jan 01, 2012 to Jan 24, 2012

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The next few slides are a sample Case Detail Report. This report is for a sample case created for training purposes only. We'll use this sample to look at the sections included in the report.

You will notice a toolbar that allows you to page through the report, adjust the view, search and print. Reports can also be sent to a variety of output formats; use the drop-down list to choose your preferred format and click the export button to execute.

First, the header of the report shows some basic information like the case ID, person, case managing organization, case manager, status and start date. Below that, the parameters of the report are echoed back so the user can see exactly what was selected to be included in this report.

# Sample Report

Person Details			
Name: Jake Jackson	SIN: 129-164-158	Person ID: 100931	
Date of Birth: Jun 01, 1979	Gender: Male	Private Client: No	
Age: 32	Marital Status: Single	Service Language: Codebook	
Date of Death:		Other Language: Codebook	
Contact Information			
Phone Information	Email Information	Mailing:	5678 Queen Street Halifax, NS B3K 4H1, CA
Home: (902) 555-5555 Default	Home:		Default
Work:	Work:	Civic:	
Mobile: (902) 555-5555			
Fax:			
Case Registration			
Case Type: ECM			
Dept/Area: LAE-ENS			
Program: ECM			
Accountability Reporting: 0 - Oct 01, 2011 - Sep 30, 2012 - EAS(LAE-ENS)			
Copy Case Information from Previous Case:			
Registration Details			
Employment Status:	Unemployed	Preferred Contact Method:	Email
Employment Details:	N/A	Applied for or in receipt of Employment Insurance in the last 36 months?:	
Work hours/week:		What type of claim?:	
Hourly wage:		Had a claim that ended in the last 36-60 months?:	
Expected Layoff Date:		What type of claim?:	
Are you a student?:	No	Legally entitled to work in Canada?:	Yes
Correspondence Lang:	English		

Each section of the report that you have selected in the parameters is separated by a header in the light blue/purple shade seen in this example. This is the first page of our sample report and it includes the sections on person details, case registration and registration details.

You can tell from the way the contact information has been indented that it is a sub-section of the person details. The report will display information about the case exactly as it has been entered through the person and case screens.

## Agenda

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- Welcome & Objectives
- Case Detail Report
- Person List Report
- Conclusion & Wrap Up

The second report on our agenda is called the Person List Report.

## Person List Report

➤ **An organization level report that may include:**

- Person Visibility
- Age Range From
- Age Range To
- Language Preference
- Residency Status
- NOC (Experience)
- Person self identifies as
- In receipt of the following benefits
- Case Start Date From
- Case Start Date To
- Case Manager
- Intervention Service Provider
- Organization ID
- Gender
- Marital Status
- Level of Education
- NOC (Preference)
- Targeted group membership
- Case Status
- Interventions
- Accountability Reporting

The Person List Report will be used to identify persons that your organization case manages. This list of persons can be used to identify groups for targeted interventions and to help your organization plan future staffing and activities.

This organization level report may include the items seen on this slide.

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# Accessing the Report

Logout

The screenshot shows the laMPSS web application interface. At the top, there is a header with the laMPSS logo and the text 'Labour Market Programs Support System'. Below this is a navigation bar with 'Home', 'Person Management', 'Agrmnt/Case Management', and 'Help'. The 'Person Management' tab is selected and circled in red. Below the navigation bar, there is a 'User Home Page' section with a dropdown menu showing 'Organization Home' selected. To the left of the main content area is a navigation menu with sections: 'My Organization', 'Notification Actions', 'Apply for Funding', 'Programs and Services', 'My Account', and 'Reports'. The 'Reports' section is expanded, showing 'Person List Report', 'Intake Form', and 'Enhanced Service'. A red arrow points from the 'Person List Report' link in the navigation menu to a text box on the right. The text box contains the following text: '➤ The Person List Report can be accessed from the Organization Homepage' and '☐ Select Person List Report from Reports in the left navigation menu.'

➤ The **Person List Report** can be accessed from the **Organization Homepage**

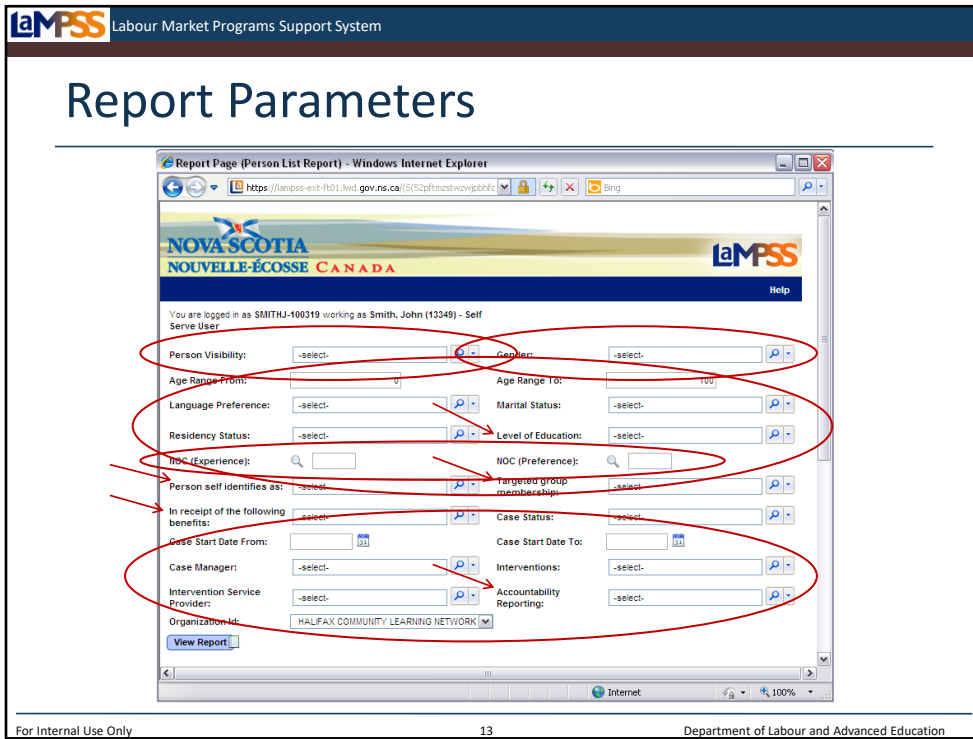
☐ Select **Person List Report** from **Reports** in the left navigation menu.

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The Person List Report can be accessed through the reports section of the left navigation menu on the organization homepage.

You will need to navigate to your organization homepage and then launch the report from the left navigation menu.

This report can only be accessed here, from the organization homepage. It will not appear in the left navigation menu from other screens.



The Person List Report will automatically open in a new browser window when you select it from the left navigation menu. You will select your desired parameters for the report and then click the view report button to generate the report. Any time a parameter is not specified no filter will be applied to the person list report.

The first parameter is person visibility and allows you to choose either private or shared persons (or both) to be included in the report. Next, you have the option to narrow the results displayed in the report by gender (male, female or unknown).

The report can be narrowed down to clients with a specific age range, language preference, marital status or residency status as well.

The level of education pick list allows you to select to include clients with a specific level of education from elementary to a doctorate.

The NOC code search can be launched from the report to select a specific NOC code to narrow down the results included in the report. The first NOC code is the one that appears on the education and experience page in LaMPSS while the second NOC code is the one that appears on the needs determination screen in LaMPSS. If you select a NOC code in either of these fields only clients with cases indicating that exact NOC code will be returned in your search results.

Next you can narrow down the report to clients who have self-identified, are members of a target group or are in receipt of specific benefits (e.g. Canada Pension Plan, student loans).

You can also decide to select only persons with cases in a specific status, or with cases that have started between specific dates. The report can be narrowed down to persons working with certain case managers, interventions or intervention service providers.

Finally, you can also choose to select clients that are associated with a specific EAS agreement in the accountability reporting field (helpful if your organization has multiple EAS agreements with ENS).

The parameters you select for the report will be “echoed” back at the start of the report underneath the header information.

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# Sample Report

Person List Report

Organization: HALIFAX COMMUNITY LEARNING NETWORK

Person Viability: Shared  
 Gender: [Redacted]  
 Age Range: 20 to 75  
 Language Preference: [Redacted]  
 Marital Status: [Redacted]  
 Residency Status: [Redacted]  
 Education: [Redacted]  
 NOC (Experience): [Redacted]  
 NOC (Preference): [Redacted]

Accountability Reporting:  
 Person self identified as: [Redacted]  
 Targeted group membership:  
 In receipt of the following benefits:  
 Case Status: Assessment, Follow-up, Intake, RTWAP Dev, RTWAP Mgmt  
 Case Start Date: [Redacted]  
 Case Manager: Smith, John, Smith, Jane

Interventions:  
 Intervention Service Provider: [Redacted]

Person Name	Gender	Age	Phone #	Email	Address	City	Province	Postal Code	El Active / Re-Track	Visible Minority	Aboriginal	PWD	Case ID	Case Status	Employment Achieved
Brown, Bobby	Male	51	(555) 555-5555		9 Lazy River Road	Dartmouth	NS	B2Y 4V9	Yes	No	No	No	<a href="#">101250</a>	Intake	No
Jackson, Jake	Male	32	(902) 555-5555		5578 Queen Street	Halifax	NS	B3K 4N1	No	No	No	No	<a href="#">101271</a>	RTWAP Mgmt	No
Johnson, Doug	Male	51	(902) 555-5555		35 Oceanview Drive	Sydney	NS	B1Y 2Y5	Yes	No	No	No	<a href="#">101242</a>	Assessment	No
Jones, Jane	Female	48	(555) 555-5555		321 Bedford Drive	Bedford	NS	B4R 3T5	No	No	No	No	<a href="#">101252</a>	Intake	No
MacLeod, Mark	Male	31	(555) 555-5555		789 Summer Street	Halifax	NS	B4B 3E2	No	No	No	No	<a href="#">101252</a>	Intake	No
Mason, Mandy	Female	28	(555) 555-5555		123 Queen Street	Halifax	NS	B2S 4B3	Yes	No	No	No	<a href="#">101241</a>	Intake	No
Patterson, Peter	Male	42	(555) 555-5555		456 Prince Street	Eastern Passage	NS	B3R 4E2	No	No	No	No	<a href="#">101221</a>	Intake	No
Smith, Joey	Male	33	(555) 555-5555		456 River Street	Dartmouth	NS	B2X 4R7	No	No	No	No	<a href="#">101232</a>	Intake	No
8													8	0	

Person List Report Created in laMPSS on Jan 24, 2012 Page 1 of 1

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Similar to the Case Detail Report, this is an example of a Person list report that has been created for training purposes only. We'll use this sample to look at the sections included in the report.

You will once again notice a toolbar that allows you to page through the report, adjust the view, search and print. Reports can also be sent to a variety of output formats; use the drop-down list to choose your preferred format and click the export button to execute.

First, the header of the report shows your organization (i.e. Halifax Community Learning Network). Below that, the parameters of the report are echoed back so the user can see exactly what was selected to be included in this report. For this sample report we have selected that we would like to see shared clients with ages between 20 and 75 years who have cases in assessment, follow up, intake, RTWAP development and management. These clients must also be case managed by either John or Jane Smith.

Finally, the report will display a list of all person records that meet the selected criteria. The list will be displayed in alphabetical order by last name. Notice that the case ID column includes a hyperlink where you can jump to the Case Detail Report for the person listed! Just click on the hyperlink and the case detail report will launch in a new browser window.



## Agenda

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- Welcome & Objectives
- Case Detail Report
- Person List Report
- Conclusion & Wrap Up

In conclusion, let's revisit briefly revisit our objectives for this session. In addition to pointing out some standard features of LaMPSS reporting, we wanted to discuss the Case Detail Report and Person List Report which will be the two most commonly used reporting features for case managers. Hopefully you are now becoming familiar with LaMPSS reports and how you might be able to use them in your daily work.

## Conclusion & Wrap Up

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➤ Where to go for help ...

- This On-Line Learning Module
- User Reference Guides (On-line Help)
- LaMPSS Operations Support [LaMPSS@gov.ns.ca](mailto:LaMPSS@gov.ns.ca)

Please refer back to this material as required to refresh your knowledge of how to use business partners and enhanced services.

So now what? If you have questions on how to use this functionality you can refer to this material or you can review the on-line LaMPSS User Guides for information on how the screens/application functions. Also, you can always contact LaMPSS Operations Support.

# Thank You!

Thank you very much for your participation!