LaMPSS Release 3.4.2

Service Registration Improvements

hey.

Mandy Grace

LaMPSS Business Support

Questions
Teams Etiquette
Support

Training Objectives

Review the changed service registration functionality being introduced in Release 3.4.2

What's Changing or New?

Service Registration Menus

Expanded menu on the Organization Homepage and new access from the User Homepage

Service Participant Screen

Changes to tooltips, added filters, and new participant registration buttons

Registration Workflow

Ability to search for, add/share a person, and register a participant from the Service Participant screen

Import Participants

Ability to search for and select a set of participants from a previously offered service to add in bulk to a current service

Register from Homepage

Ability to register a participant in one or more services from the Person Homepage

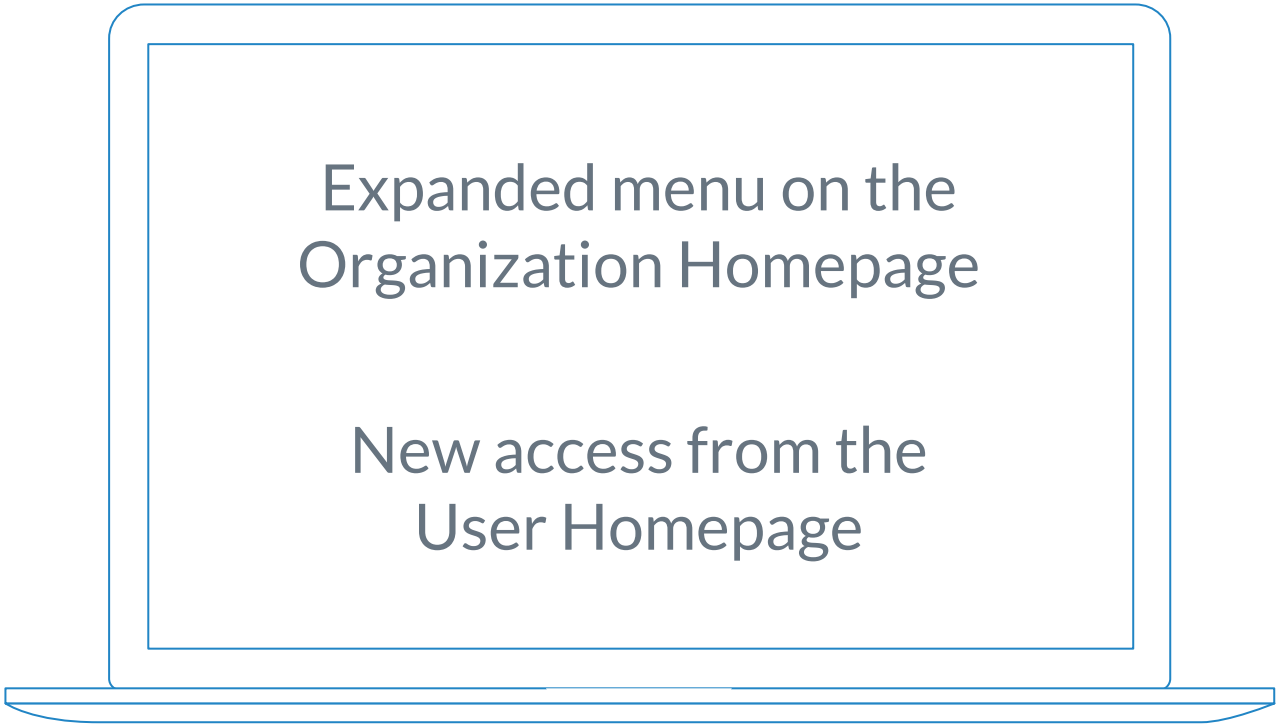
What Isn't Changing?

- Security Roles
- Service Search/Add and Service Details
- Service Registration Reports
- Service Registration Intake Form
- Participant Additional Information

What Else Should I Know?

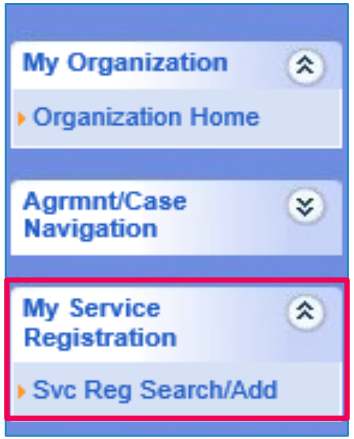
- Implementation is planned for the night of Thursday November 19th
- Training sessions (virtual) are today and Monday November 23rd
- Support materials will be posted to the LaMPSS internet page

1.
Service Registration Menus

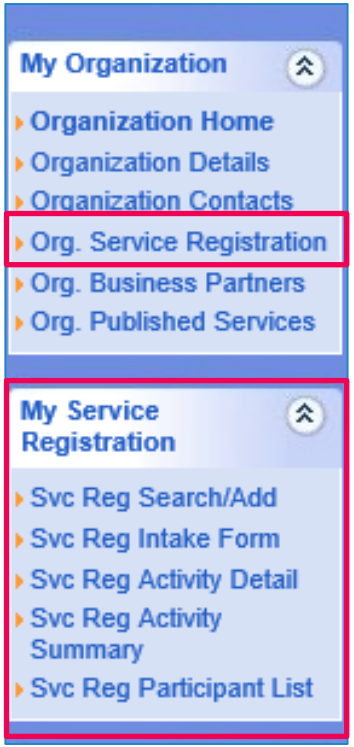

Expanded menu on the
Organization Homepage
New access from the
User Homepage

New Menu Options

- Self-Serve User Homepage



- Organization Homepage



2.
Service Participant Screen

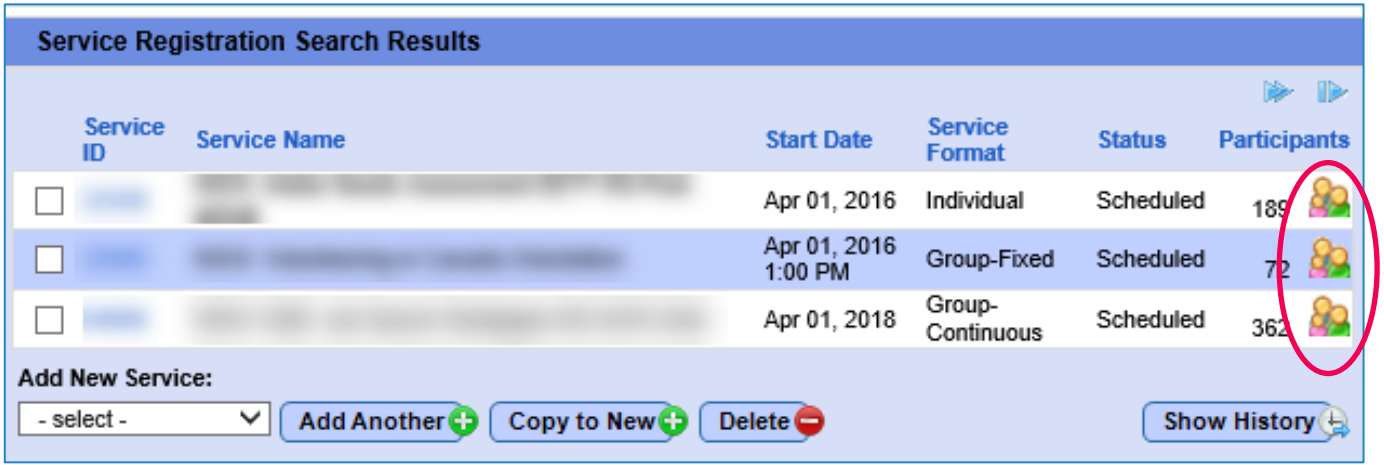
Service Participants Screen

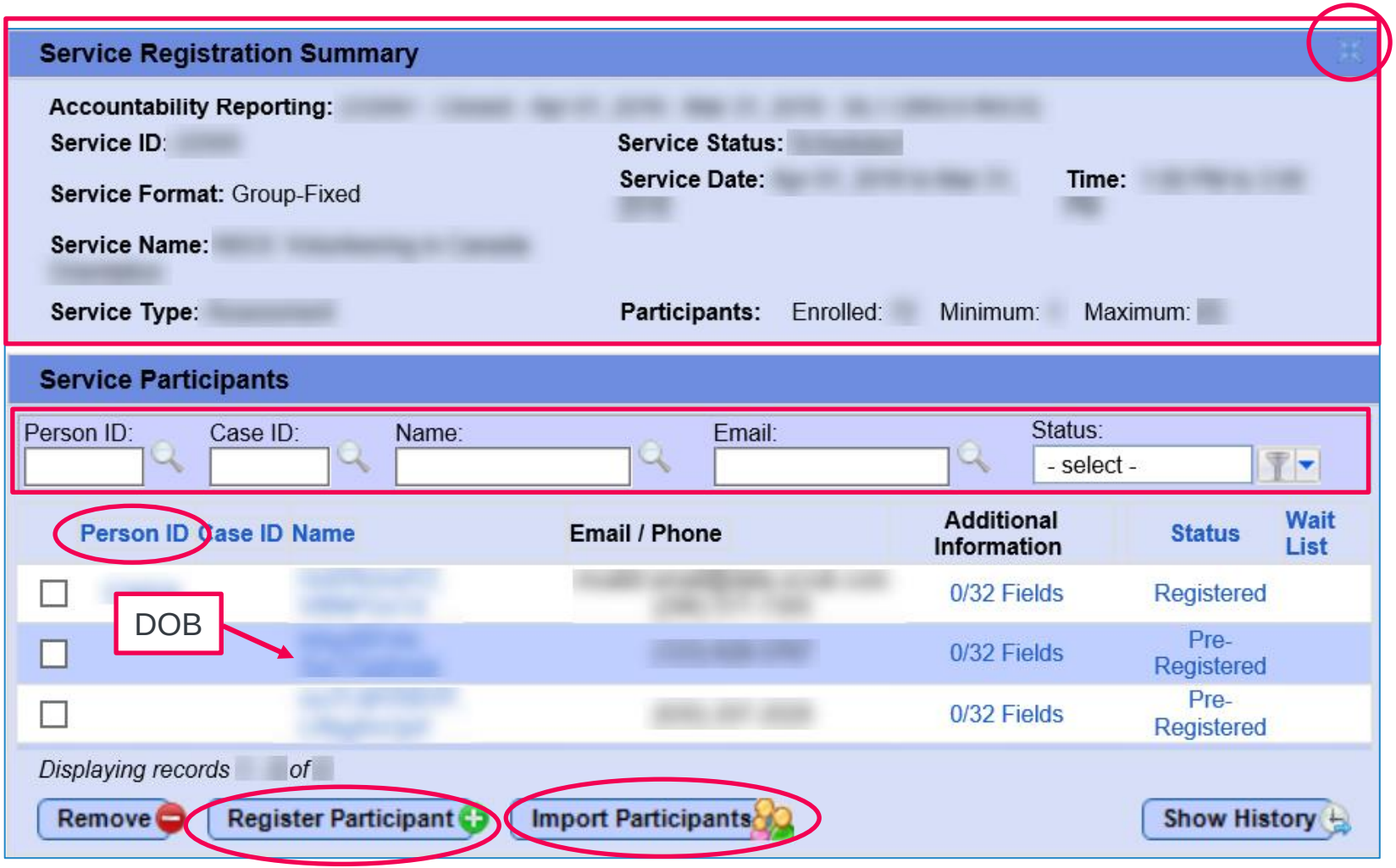
- Screen shows any existing participants in a service and is where you add or remove participants from a service
- Improvements to the look and function of the screen are included in R3.4.2

Let's take a look…

Accessing Service Participants

- From the Service Search/Add screen…




Service Registration Summary
Accountability Reporting:
Service ID:
Service Status:
Service Format: Group-Fixed
Service Date:
Time:
Service Name:
Service Type:
Participants: Enrolled: Minimum: Maximum:
Service Participants
Person ID:
Case ID:
Name:
Email:
Status:
- select -
Person ID
Case ID
Name
Email / Phone
Additional Information
Status
Wait List
0/32 Fields
Registered
0/32 Fields
Pre-Registered
0/32 Fields
Pre-Registered
DOB
Displaying records of
Remove
Register Participant
Import Participants
Show History

3.
Registration Workflow

The process was…

First	Next	Then
Navigate to the Service Participants screen, search for the participant to add. If the participant was not found…	Navigate to Person Management, search for the participant *again*, then add and share with Government.	Then navigate *back* to Service Participants, search for the participant again, then add to the service.

How has this changed?

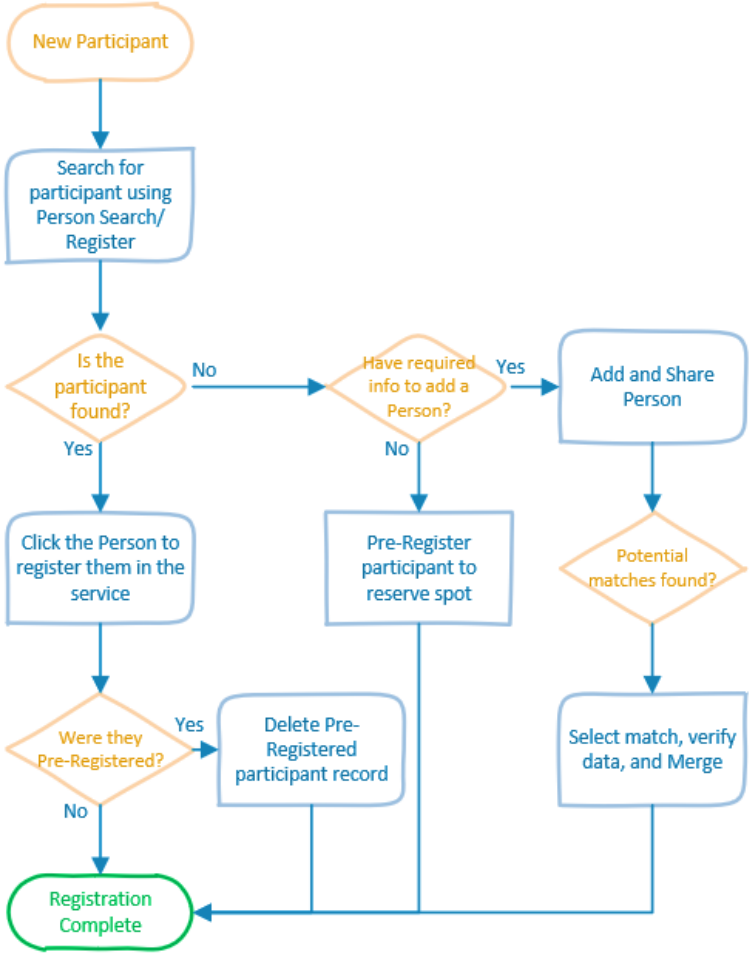
- Now, all of these steps can be completed *within* the Service Participants screen

- User does not need to *leave* the Service Registration screens to add a person in LaMPSS

New process

- Search for the participant
  - If found, add!
- If participant is not found
  - Pre-register, or
  - Add a person
- If adding a person, share and merge

All of the above steps are completed from the Service Participants screen



Service Formats – A Refresher

Group (Fixed)

- A service with multiple participants AND a defined start and end date and/or time for all participants *(e.g. 1-day workshop, multiple week training course, 1 month work experience)*

Group (Continuous)

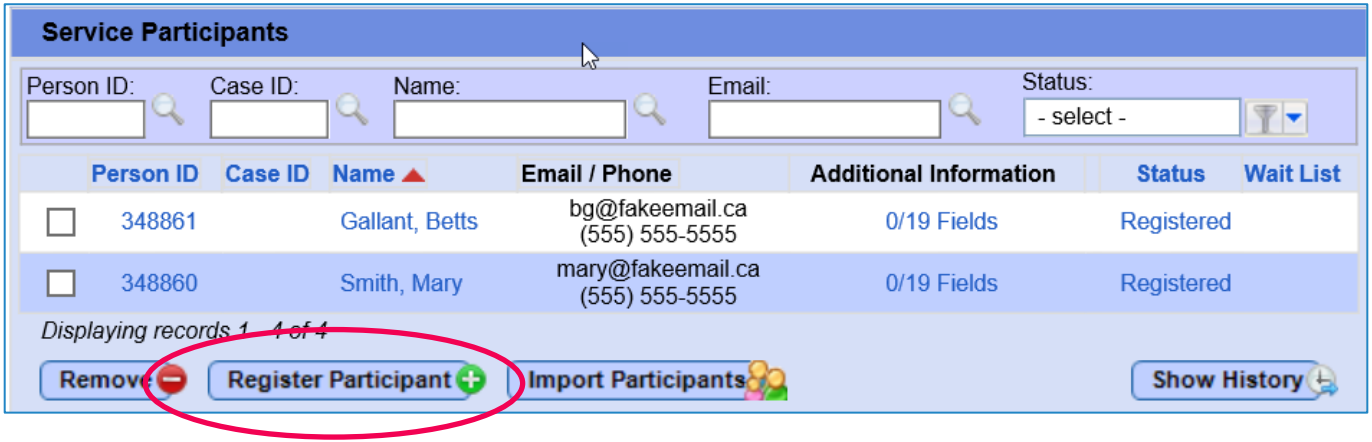
- A service with mulitple participants where each participant may start and/or finish at a different time *(e.g. group programming with continuous intake through a year)*

Individual

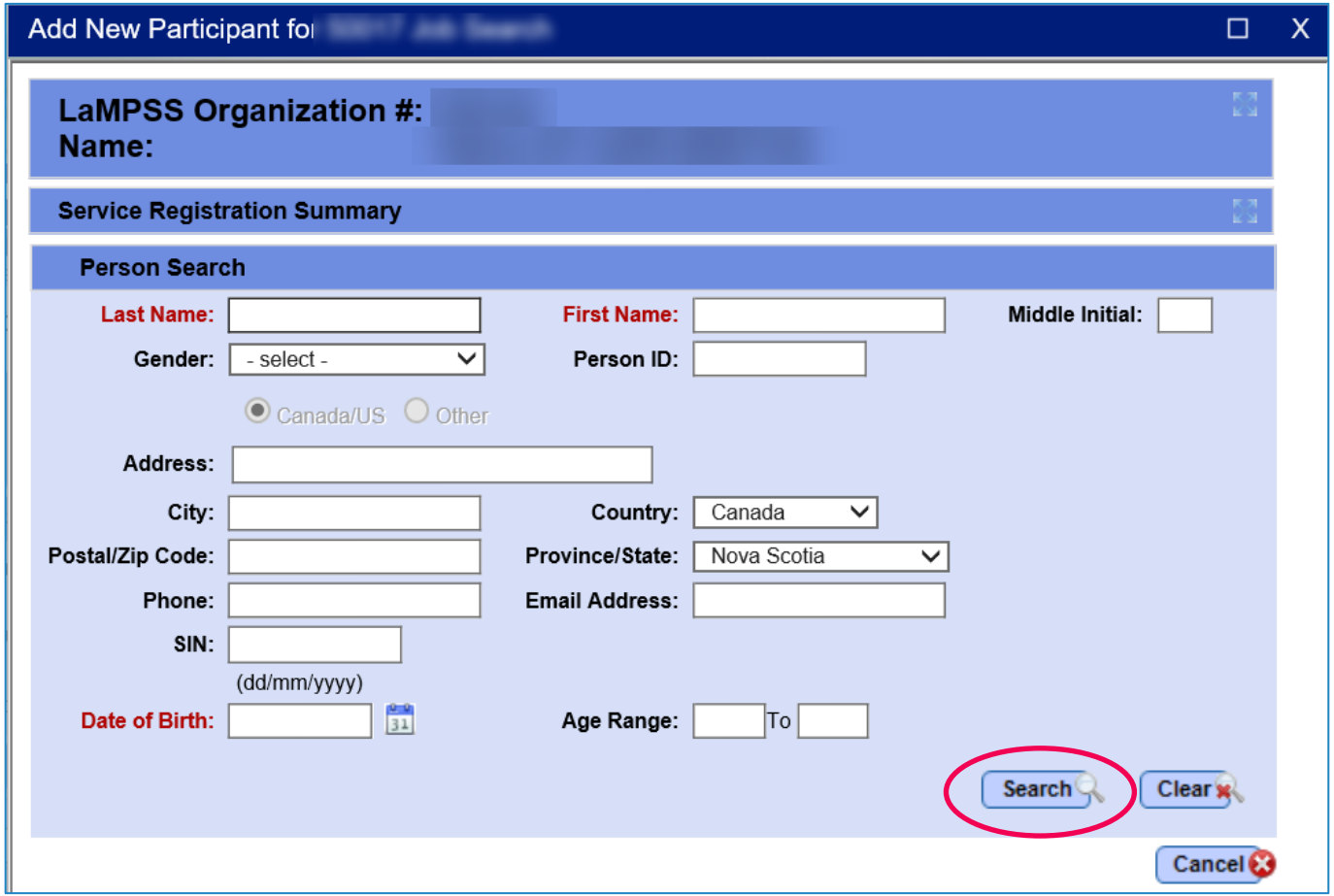
- A service offered one-on-one to each participant, in one or multiple sessions *(e.g. employment counselling, job development)*. Allows for continuous intake.

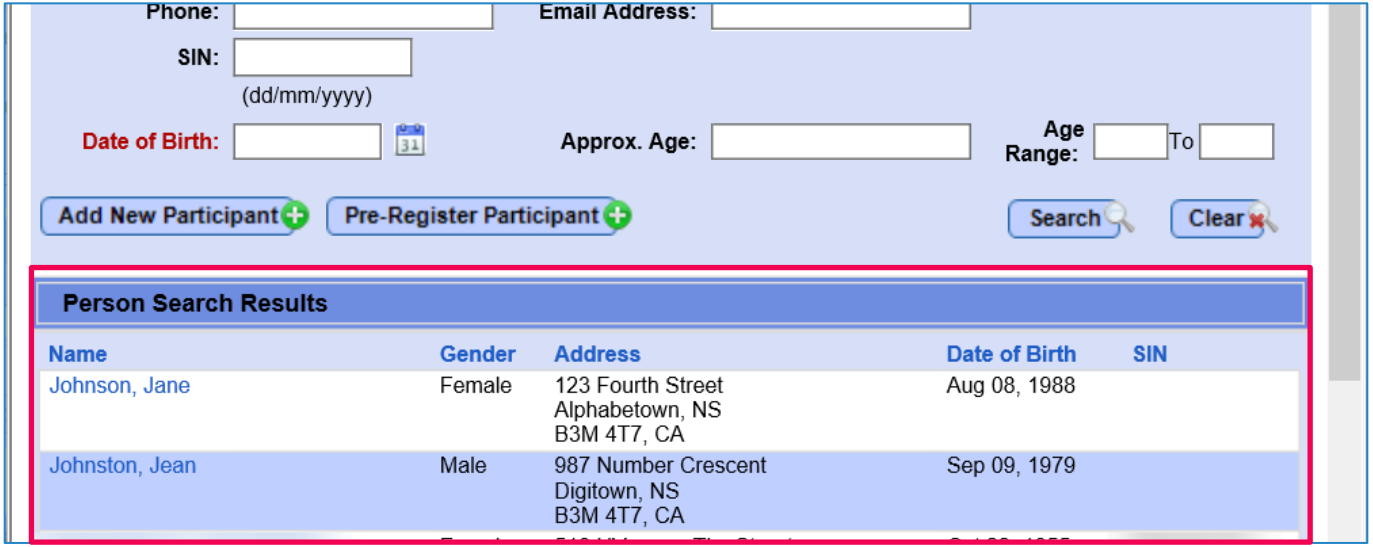
Step-by-step review

- Select the Register Participants button



- Use the Search/ Register popup to search for the participant
- Search Results will appear below the Person Search section

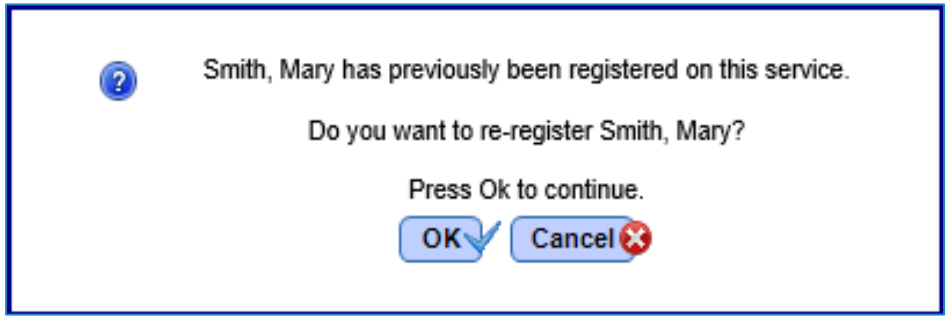




- If the participant is found, click the hyperlinked name to complete registration in the current service, then Save on the main Service Participants screen
- If the participant is not found, enter the required person data and click Add New Participant to create a new LaMPSS person and add them to the service

Participant Registration Business Rules

- For Group (Fixed) If the selected participant is already registered in the service, an error message is displayed.
- For Group (Continuous) and Individual services, if the selected participant has been registered in the past, a warning message will be displayed.



Participant Registration Business Rules

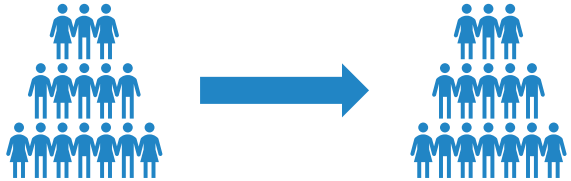
- For Group (Fixed) services, LaMPSS will also verify the maximum number of participants has not been reached
- For all Service Types, LaMPSS will verify the participant selected meets any specific registration requirements of the program.
  - If registration requirements are not met, a warning message is displayed and you are given the option of pre-registering the participant

4.
Import Participants

Import Participants

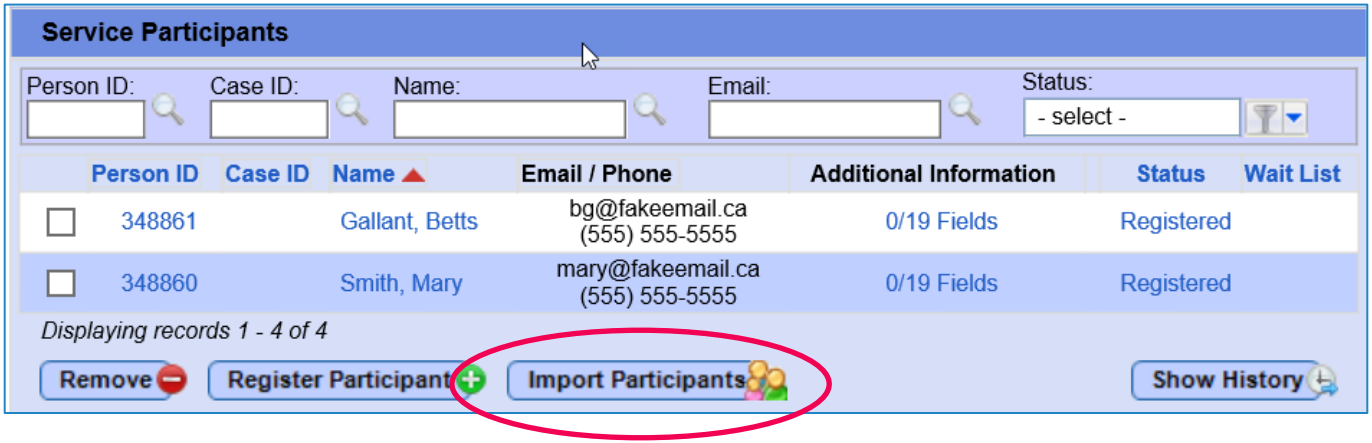
- Reviewed how to search for and add participants one-by-one

- Can also bulk import participants from another service offered by your organization

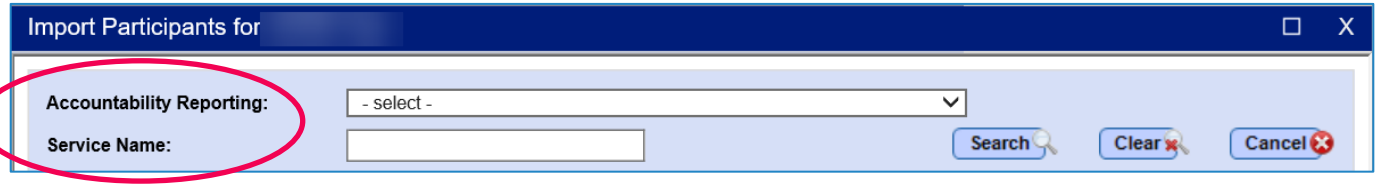


Step-by-step review

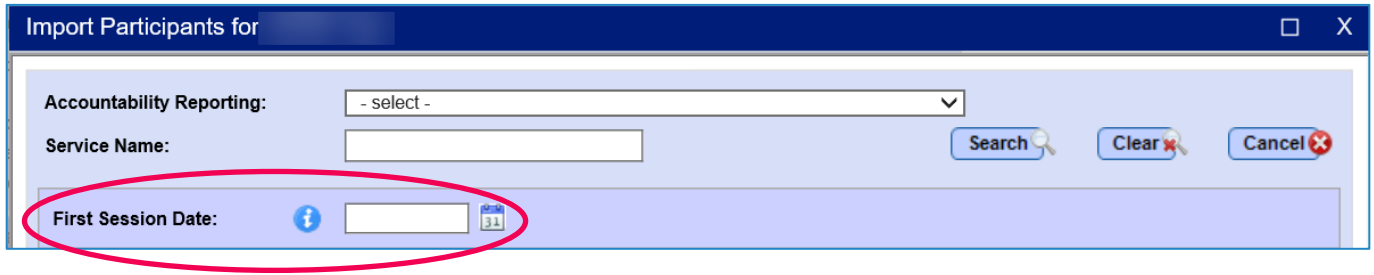
- To access the Import screen, select the Import Participants button on the Service Participants screen



- The Import Participant Service Search popup will display

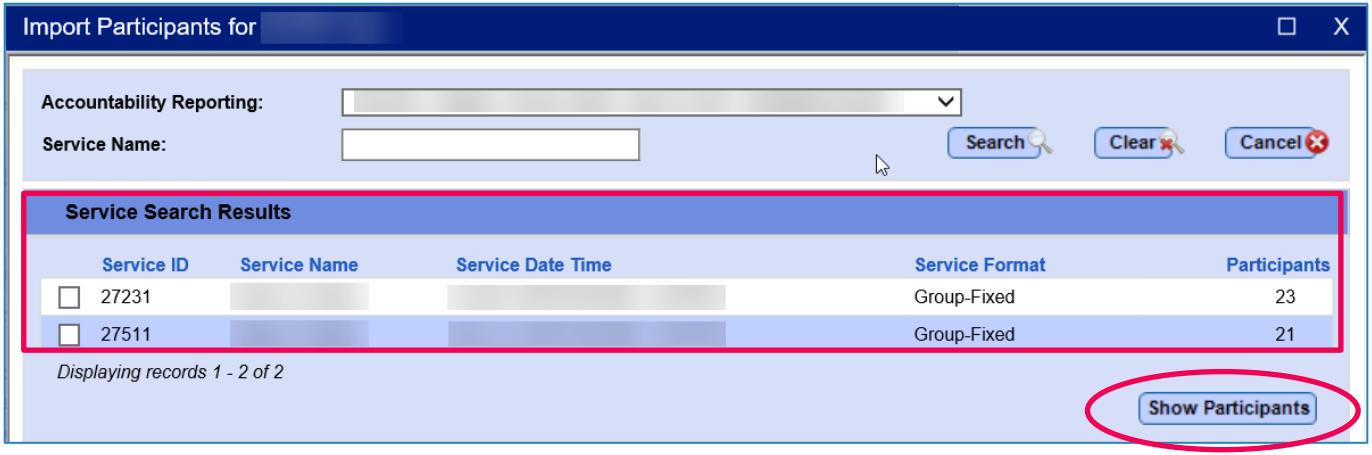


- You can search by Accountability Reporting and/or Service Name
- For an Individual service, you will also need to enter a First Session Date



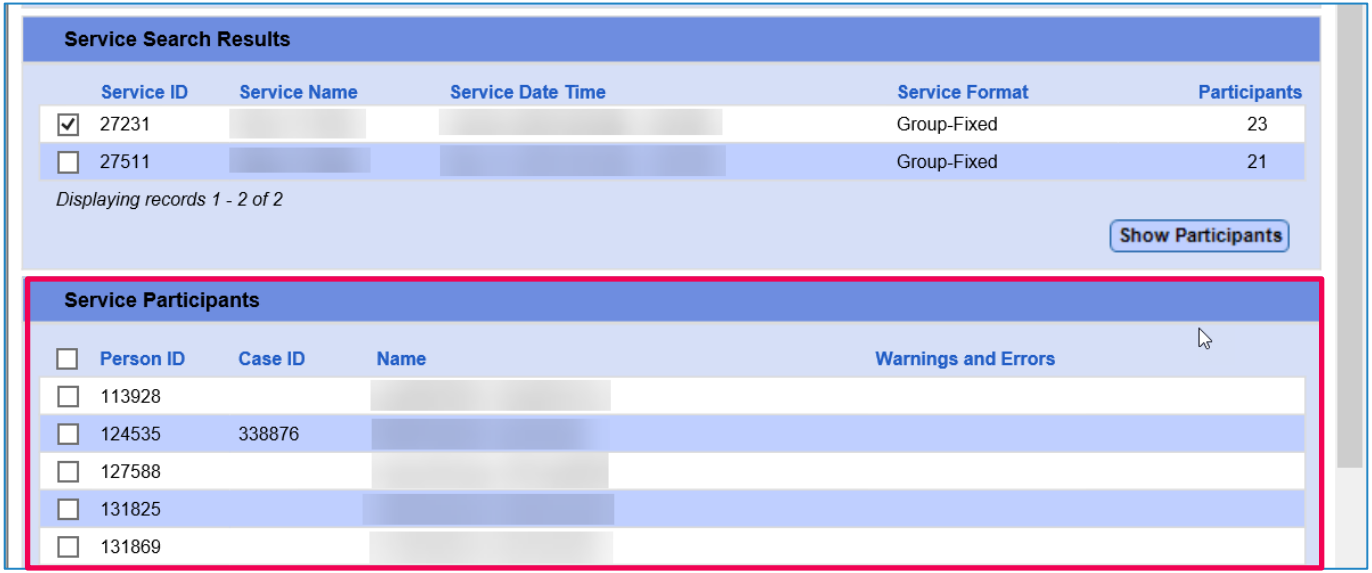
- The Service Search Results will appear in the bottom of the popup

- The Service Search Results section of the Import Participant popup displays the results of the search



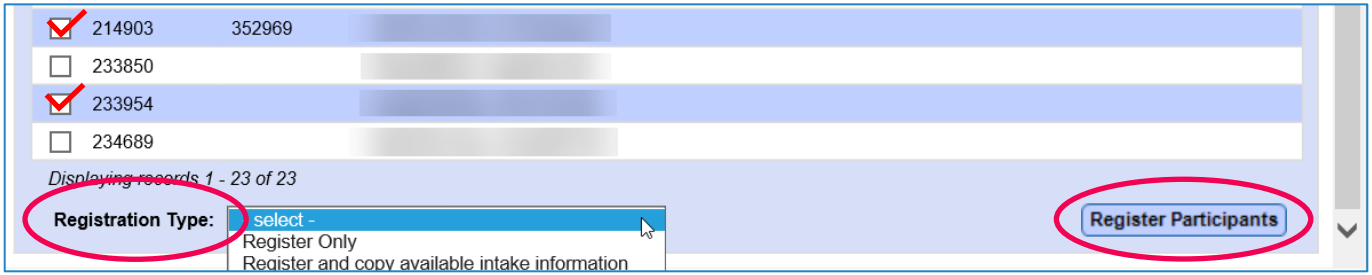
- One or multiple services can be selected before clicking Show Participants
- Once you click the Show Participants button another section will appear at the bottom of the window to display the list of Service Participants

- 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

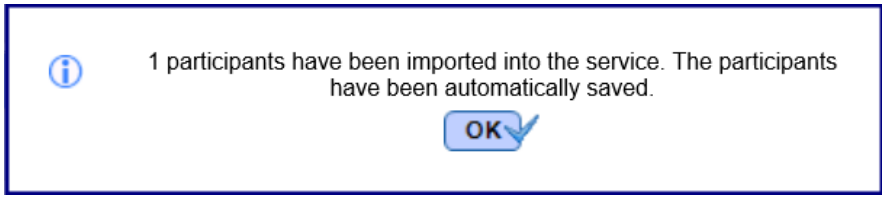


- Using the checkboxes, you can select the participants to register in the service.

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

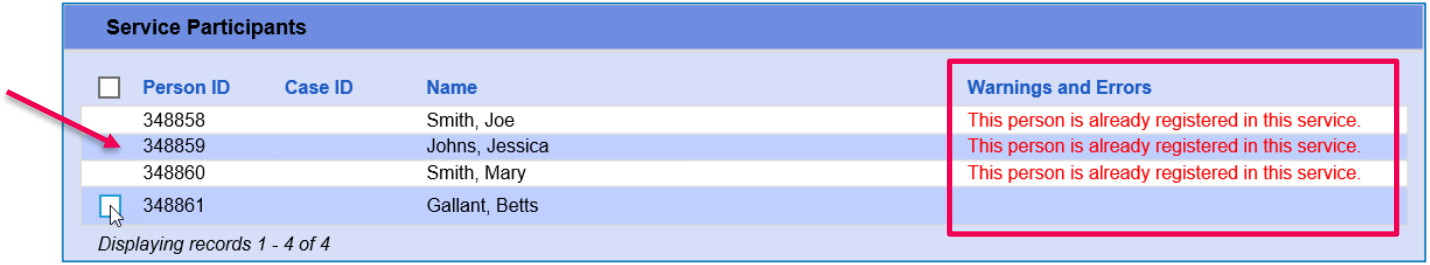


- Once the Registration Type is selected click Register Participants.
- The selected participants will be added, and a confirmation message will display:



Import Participant Warnings and Errors

- LaMPSS will not display a selection checkbox for a participant that does not meet the necessary conditions for the service



Service Participants

	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.
	348861		Gallant, Betts	

Displaying records 1 - 4 of 4

- An error will display in the Service Participants list
- The requirements will change depending on the requirements of the funding program

Import Participant Warnings and Errors

- Sample errors:
  - The person is already registered in the Group (Fixed) service *or* is registered and has not been completed in a Group (Continuous) / Individual service
  - A Case ID is required
  - SIN is required
  - The maximum # of participants has been reached for a Group (Fixed) service

Working through Any Errors

- Review the messaging – it will explain what is required!
- Import any participants without an error
  - Make note of those with an error and what is required
- Save the Service Participants screen
- Navigate to the necessary person records to make updates
- Return to the Service Participants screen
  - Do another import, or
  - Register one-by-one

5.
Register from Person Homepage

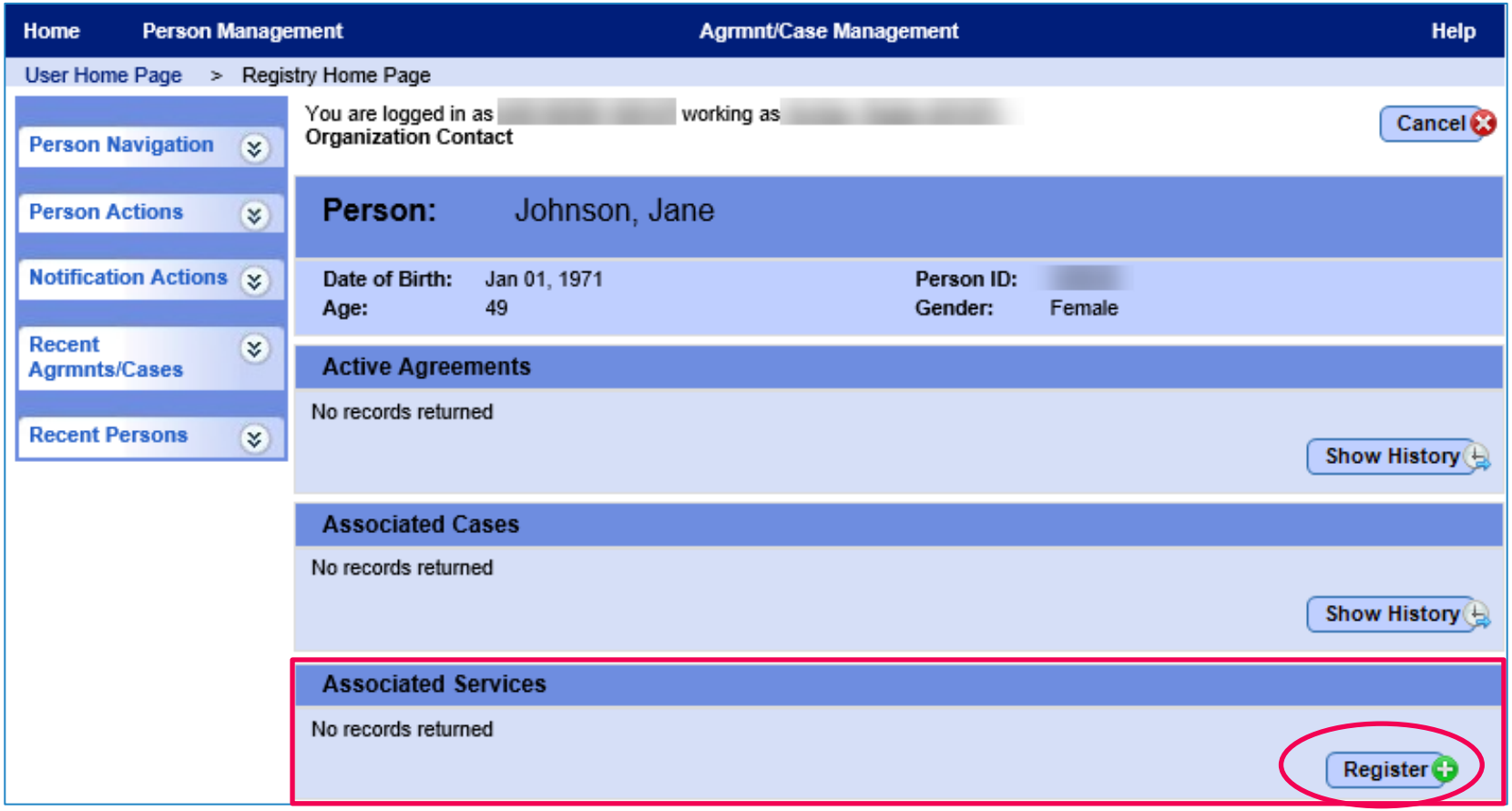
Register from Person Homepage

- A person can also be registered in service from the Person Homepage

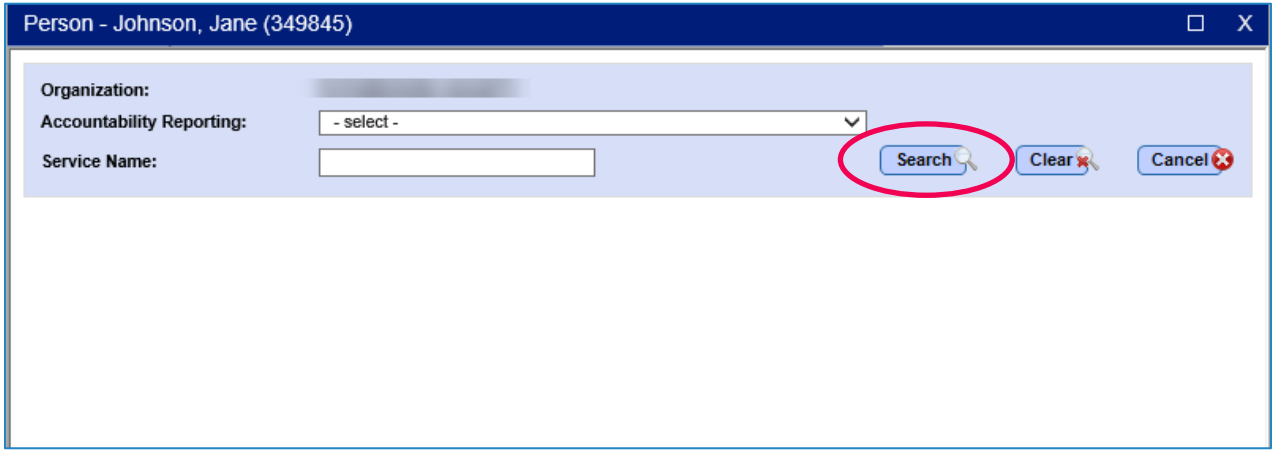
- This new functionality allows a user to register the person in one *or more* services

Step-by-step review

- To register from the Person Homepage, click the Register button in the Associated Services section

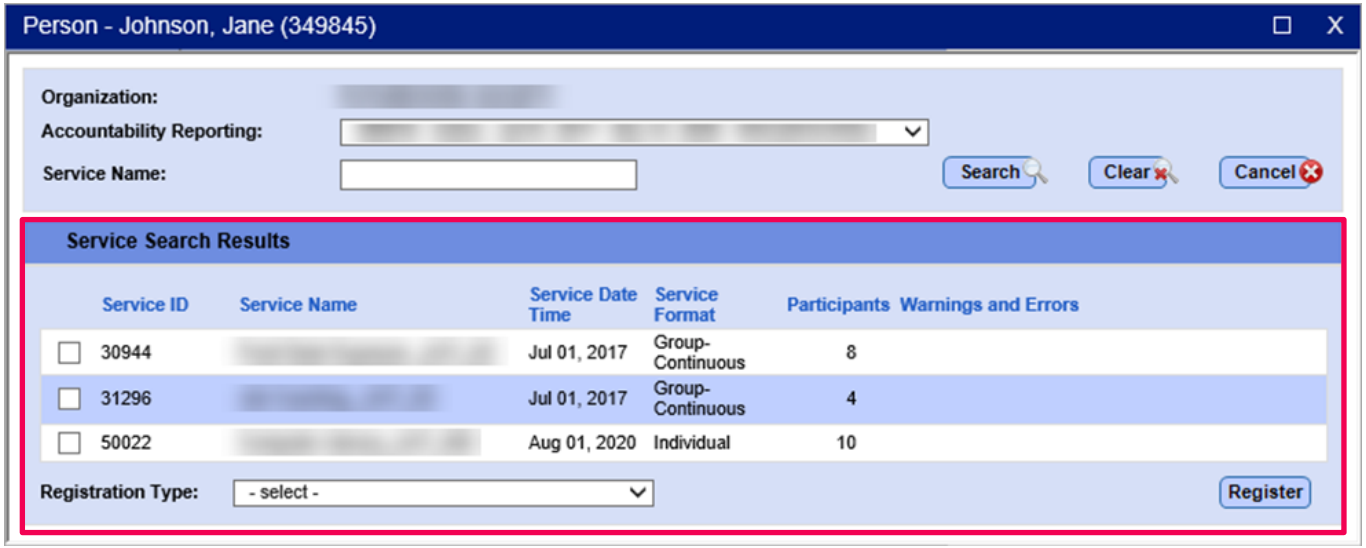

Home
Person Management
Agrmnt/Case Management
Help
User Home Page > Registry Home Page
Person Navigation
Person Actions
Notification Actions
Recent Agrmnts/Cases
Recent Persons
You are logged in as [redacted] working as [redacted]
Organization Contact
Cancel
Person: Johnson, Jane
Date of Birth: Jan 01, 1971
Age: 49
Person ID: [redacted]
Gender: Female
Active Agreements
No records returned
Show History
Associated Cases
No records returned
Show History
Associated Services
No records returned
Register

- When you select Register, the Service Participant Registration popup will appear

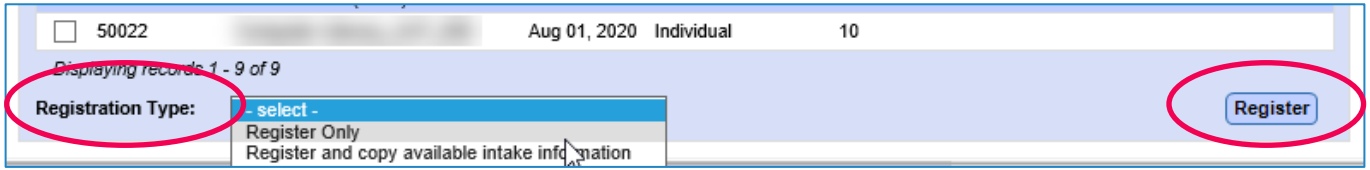


- Select the Organization delivering the service from the dropdown menu, then search by Accountability Reporting and/or Service Name

- The Service Search Results will appear in the bottom of the popup
- Select one or more services using the checkboxes



- A selection checkbox will appear for each service where the current person meets the requirements and no other errors are present (e.g. maximum participants reached)



- Select a Registration Type and the click Register button
- A confirmation message will display

Let's Review

Service Registration Menus

Expanded menu on the Organization Homepage and new access from the User Homepage

Service Participant Screen

Changes to tooltips, added filters, and new participant registration buttons

Registration Workflow

Ability to search for, add/share a person, and register a participant from the Service Participant screen

Import Participants

Ability to search for and select a set of participants from a previously offered service to add in bulk to a current service

Register from Homepage

Ability to register a participant in one or more services from the Person Homepage

For Support

- For questions about whether your organization is required to use service registration or how to setup services, contact the program area contact/representative.

- If you need assistance logging into or accessing LaMPSS, contact LaMPSS Operations Support.

Thanks!

Any questions?