



LaMPSS Release 3.4.2

Service Registration Improvements



hey.

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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 Menu

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

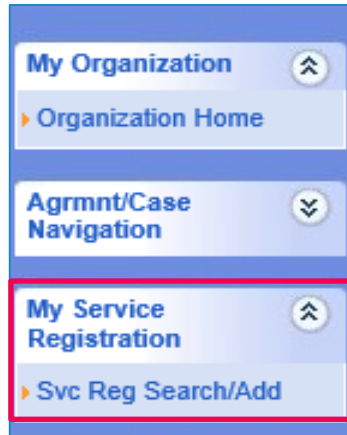


Expanded menu on the
Organization Homepage

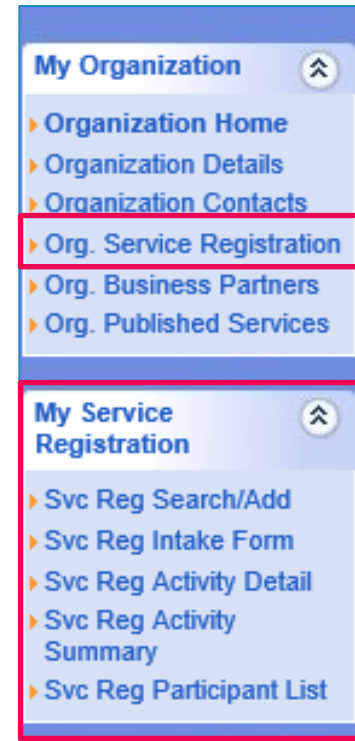
New access from the
User Homepage

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...

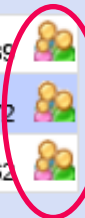
Accessing Service Participants

▷ From the Service Search/Add screen...

Service Registration Search Results

Service ID	Service Name	Start Date	Service Format	Status	Participants
<input type="checkbox"/>	[blurred]	Apr 01, 2016	Individual	Scheduled	189 
<input type="checkbox"/>	[blurred]	Apr 01, 2016 1:00 PM	Group-Fixed	Scheduled	72 
<input type="checkbox"/>	[blurred]	Apr 01, 2018	Group-Continuous	Scheduled	362 

Add New Service:



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



DOB



Displaying records

of

Remove



Register Participant



Import Participants



Show History



3. Registration Workflow

The process was...

First

Navigate to the Service Participants screen, search for the participant to add.

If the participant was not found...

Next

Navigate to Person Management, search for the participant *again*, then add and share with Government.

Then

Then navigate *back* to Service Participants, search for the participant again, then add to the service.

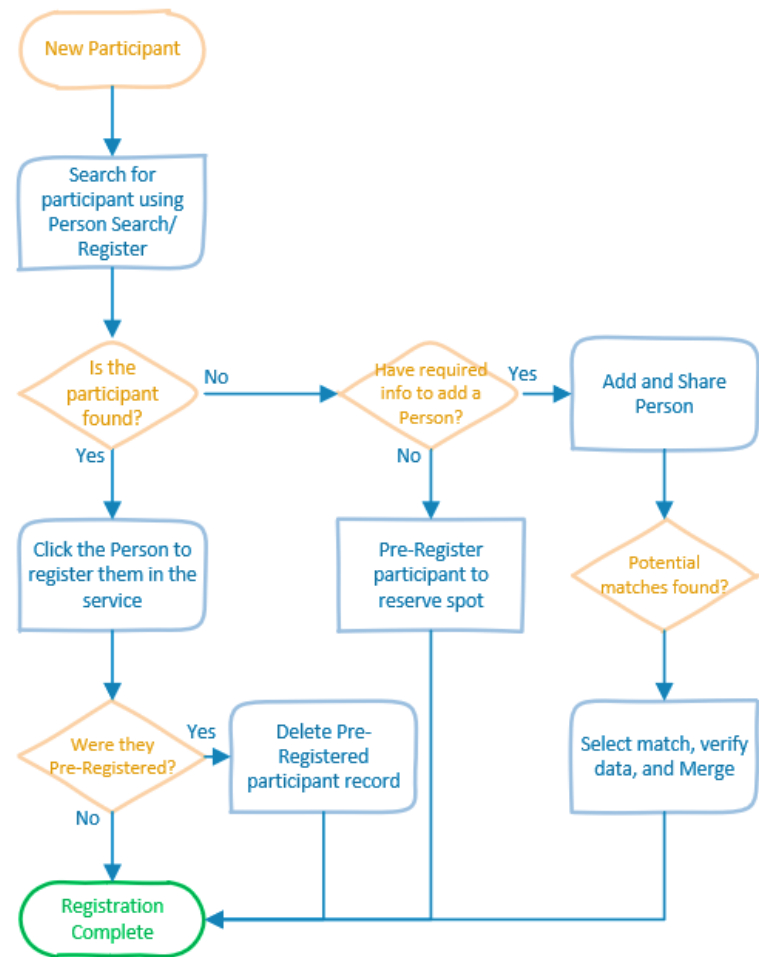
How has this changed?

- ▶ 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 multiple 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

Service Participants

Person ID: Case ID: Name: Email: Status:

	Person ID	Case ID	Name ▲	Email / Phone	Additional Information	Status	Wait List
<input type="checkbox"/>	348861		Gallant, Betts	bg@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	
<input type="checkbox"/>	348860		Smith, Mary	mary@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	

Displaying records 1 - 4 of 4

▶ Use the Search/ Register popup to search for the participant

▶ Search Results will appear below the Person Search section

Add New Participant for [Organization Name]

LaMPSS Organization #: [Redacted]
Name: [Redacted]

Service Registration Summary

Person Search

Last Name: [Text Field] **First Name:** [Text Field] **Middle Initial:** [Text Field]

Gender: [- select -] **Person ID:** [Text Field]

Canada/US Other

Address: [Text Field]

City: [Text Field] **Country:** [Canada] **Province/State:** [Nova Scotia]

Postal/Zip Code: [Text Field] **Email Address:** [Text Field]

Phone: [Text Field]

SIN: [Text Field]

Date of Birth: [Text Field] [Calendar Icon] **Age Range:** [Text Field] To [Text Field]

Search [Magnifying Glass Icon] **Clear** [X Icon]

Cancel [X Icon]

Phone: Email Address:

SIN:
(dd/mm/yyyy)

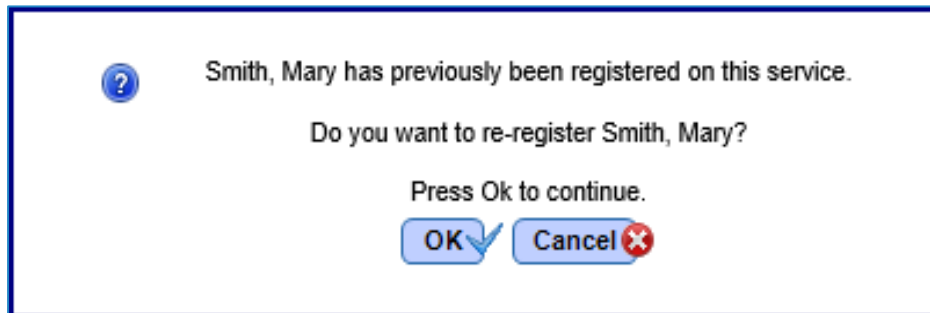
Date of Birth: Approx. Age: Age Range: To

Person Search Results				
Name	Gender	Address	Date of Birth	SIN
Johnson, Jane	Female	123 Fourth Street Alphabetown, NS B3M 4T7, CA	Aug 08, 1988	
Johnston, Jean	Male	987 Number Crescent Digitown, NS B3M 4T7, CA	Sep 09, 1979	

- ▶ 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

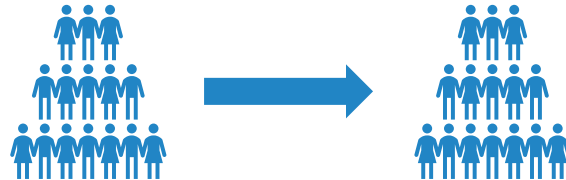
- ▶ For Group (Fixed) services, LaMPSS will also verify the maximum number of participants has not been reached
- ▶ For all Service Types, LaMPSS will verify the participant selected meets any specific registration requirements of the program.
 - If registration requirements are not met, a warning message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

Service Participants

Person ID: Case ID: Name: Email: Status:

	Person ID	Case ID	Name ▲	Email / Phone	Additional Information	Status	Wait List
<input type="checkbox"/>	348861		Gallant, Betts	bg@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	
<input type="checkbox"/>	348860		Smith, Mary	mary@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	

Displaying records 1 - 4 of 4

- ▶ The Import Participant Service Search popup will display

Import Participants for

Accountability Reporting: - select -

Service Name:

Search Clear Cancel

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

Import Participants for

Accountability Reporting: - select -

Service Name:

First Session Date:

Search Clear Cancel

- ▶ 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

The screenshot shows a window titled "Import Participants for" with a search interface. At the top, there is a dropdown menu for "Accountability Reporting:" and a text input field for "Service Name:". To the right of the "Service Name" field are three buttons: "Search" (with a magnifying glass icon), "Clear" (with an eraser icon), and "Cancel" (with an 'X' icon). Below this is a section titled "Service Search Results" which contains a table with two rows of data. The table has five columns: "Service ID", "Service Name", "Service Date Time", "Service Format", and "Participants". The first row shows Service ID 27231, Service Format "Group-Fixed", and 23 Participants. The second row shows Service ID 27511, Service Format "Group-Fixed", and 21 Participants. Below the table, it says "Displaying records 1 - 2 of 2". At the bottom right of the window, there is a button labeled "Show Participants" which is circled in red.

Service ID	Service Name	Service Date Time	Service Format	Participants
<input type="checkbox"/> 27231			Group-Fixed	23
<input type="checkbox"/> 27511			Group-Fixed	21

- ▶ 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

The screenshot displays two tables from a web application. The top table, titled 'Service Search Results', has columns for Service ID, Service Name, Service Date Time, Service Format, and Participants. It shows two records: one with Service ID 27231 (checked) and another with Service ID 27511. Below the table is a 'Show Participants' button. The bottom table, titled 'Service Participants', has columns for Person ID, Case ID, Name, and Warnings and Errors. It lists six participants with their respective IDs and Case IDs. A red box highlights the 'Service Participants' table.

Service Search Results					
	Service ID	Service Name	Service Date Time	Service Format	Participants
<input checked="" type="checkbox"/>	27231			Group-Fixed	23
<input type="checkbox"/>	27511			Group-Fixed	21

Displaying records 1 - 2 of 2

Show Participants

Service Participants				
<input type="checkbox"/>	Person ID	Case ID	Name	Warnings and Errors
<input type="checkbox"/>	113928			
<input type="checkbox"/>	124535	338876		
<input type="checkbox"/>	127588			
<input type="checkbox"/>	131825			
<input type="checkbox"/>	131869			

- ▶ 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.

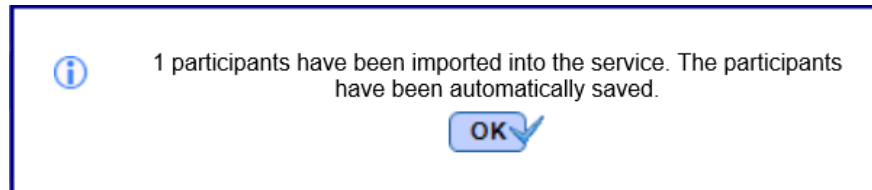
<input checked="" type="checkbox"/>	214903	352969	[blurred]
<input type="checkbox"/>	233850		[blurred]
<input checked="" type="checkbox"/>	233954		[blurred]
<input type="checkbox"/>	234689		[blurred]

Displaying records 1 - 23 of 23

Registration Type: select -
Register Only
Register and copy available intake information

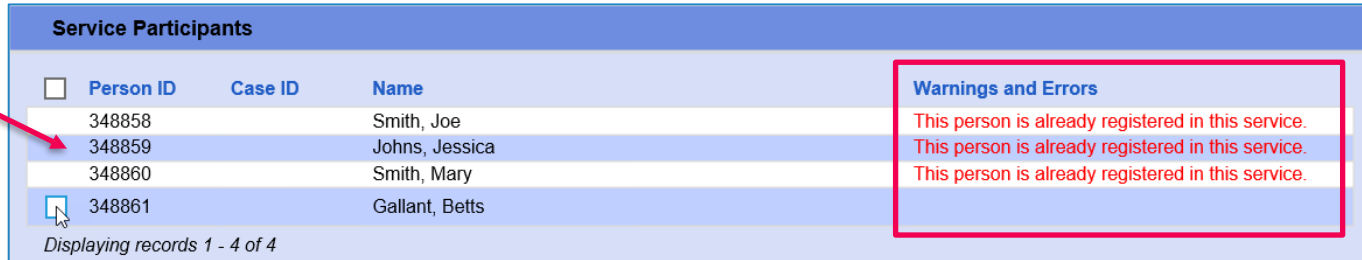
Register Participants

- ▶ 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



The screenshot shows a table titled "Service Participants" with columns for "Person ID", "Case ID", and "Name". The first three rows have checkboxes in the "Person ID" column, while the fourth row (348861) does not. A red box highlights a "Warnings and Errors" section on the right, containing three red error messages: "This person is already registered in this service." for each of the first three participants. A red arrow points to the checkbox for the second participant (348859).

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

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 ContactCancel **Person:** Johnson, Jane

Date of Birth: Jan 01, 1971


Person ID: [redacted]

Age: 49


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

Person - Johnson, Jane (349845)

Organization: [blurred]

Accountability Reporting: - select -

Service Name: [text input]

Search [magnifying glass icon] Clear [X icon] Cancel [X icon]

- ▶ 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

Person - Johnson, Jane (349845)

Organization: [blurred]
Accountability Reporting: [dropdown]
Service Name: [input] [Search] [Clear] [Cancel]

Service Search Results

Service ID	Service Name	Service Date Time	Service Format	Participants	Warnings and Errors
<input type="checkbox"/> 30944	[blurred]	Jul 01, 2017	Group-Continuous	8	
<input type="checkbox"/> 31296	[blurred]	Jul 01, 2017	Group-Continuous	4	
<input type="checkbox"/> 50022	[blurred]	Aug 01, 2020	Individual	10	

Registration Type: [- select -] [Register]

- ▶ 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)

The screenshot shows a web interface for registration. At the top, there is a header with a checkbox, the number '50022', a date 'Aug 01, 2020', the word 'Individual', and the number '10'. Below the header, it says 'Displaying records 1 - 9 of 9'. A dropdown menu is open for 'Registration Type:', showing three options: 'select -', 'Register Only', and 'Register and copy available intake information'. A 'Register' button is visible on the right side of the interface. Red circles highlight the 'Registration Type:' label and the 'Register' button.

- ▶ 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



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



Service Participant Screen

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



Register from Homepage

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



Registration Workflow

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

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?