

There are two places in LaMPSS where participants can be registered in services. The first is the Service Participants screen, found within the My Service Registration module. The [Person Homepage](#) of the participant to be added can also be used to register the participant in one or more services.

Use the links below to navigate to a specific section of this guide for detailed information:



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Service Participants Screen


This section of reviews how to access and use the Service Participants screen.

Accessing the Service Participants Screen

To access the Service Participants screen for any service, click on the participants icon for the service in the Service Registration Search Results.

Service Registration Search Results						
Service ID	Service Name	Start Date	Service Format	Status	Participants	
<input type="checkbox"/>	[blurred]	[blurred]	Individual	Scheduled	3	
<input type="checkbox"/>	[blurred]	[blurred]	Group-Fixed	Scheduled	6	



You can also access the screen by clicking the  icon at the bottom of any Service Details screen.

Service Participants Overview

There are two main sections of the Service Participants screen:

- **Service Registration Summary** – This section displays a summary of the service currently being viewed.
- **Service Participants** – This section will pre-populate with any existing (active) participants in the service and includes buttons to Delete a service, Register Participant, and Import Participants. The Show History button can be selected to display participants in other statuses (e.g. Completed)

The Service Participants list will display up to 50 participant records per page. By default, the list is sorted in ascending order by name. The list will display this information for each participant:

- **Person ID** – The participant's unique LaMPSS Person ID. The Person ID is a hyperlink to the Person Homepage.
- **Case ID** – If the participant has an active case this will be displayed. The Case ID is a hyperlink to the Case Homepage if you have privileges to view the information. A tooltip will display the status of the case and the name of the Case Manager.
- **Name** – The participant's name will be displayed in a <last name, first name> format. A tooltip will display the participant's date of birth. The name will hyperlink to the Person Homepage if the participant has been added as a LaMPSS Person or to the Participant Details Pop-up if the participant is in Pre-Registered status.
- **Email/Phone** – If available, the participant's default email address and phone number will be displayed.

- **Additional Information** – The number of Additional Information fields for the service and the number of fields that are completed for the participant. This is a hyperlink to the [Additional Information](#) screen.
- **Last Session** – The date of the most recent session. This is only displayed when the Service Format is Individual and will hyperlink to the [Additional Information](#) screen.
- **Status** – The participant's current registration status. This is a hyperlink to the [Additional Information](#) screen.
- **Wait List** – A system-generated number indicating the order in which the participant was added to the waitlist. This is only displayed when the Service Format is Group (Fixed).

If you used Service Registration prior to November 2020, you will notice an improved workflow for adding participants.



Prior to Release 3.4.2 if a participant had not previously been added to LaMPSS, it would be necessary to *navigate away* from the Service Registration screens to complete a Person Search, add a new person, and share the person with government. Then, upon returning to the Service Registration Participants screen it would be necessary to search for the newly added person to add them as a participant.

LaMPSS now includes the ability to search for, add a person, share with government, and register in a service within the same module and screen(s).

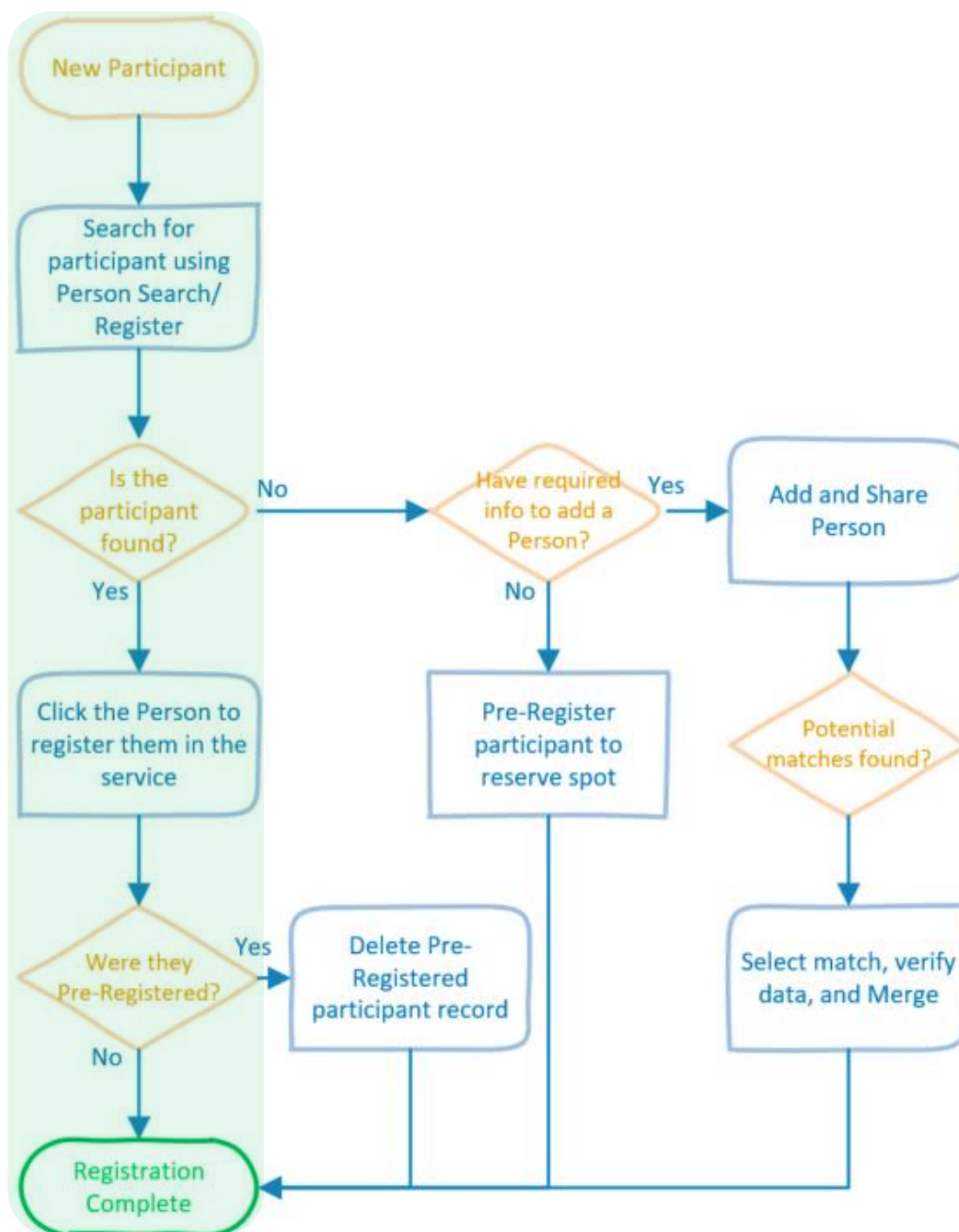
The workflow to register participants is illustrated in the diagram on the next page.

Participant Registration Workflow

This flowchart illustrates the sequence of steps to register a participant in a service from the Service Participants page. The functionality associated with each step is detailed in the sections to follow.

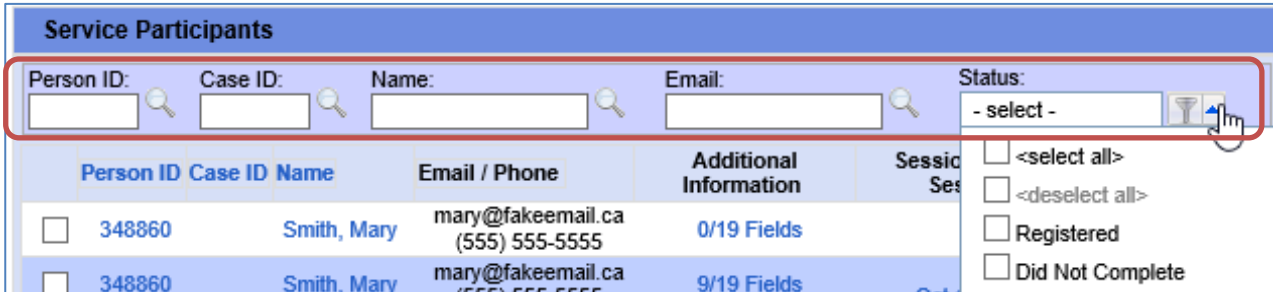
The most direct flow, to register a participant who is *already* a LaMPSS person, is shaded in green on the far left.

The steps to follow if the participant *does not already* exist in LaMPSS and/or you do not have all the necessary information about the participant are detailed in the rest of the flowchart.



Service Participant List Filters

When a list of Service Participants is displayed, a series of optional parameters can be used to help you search for specific participants by filtering the participant list. These parameters are displayed across the top of the Service Participants list.



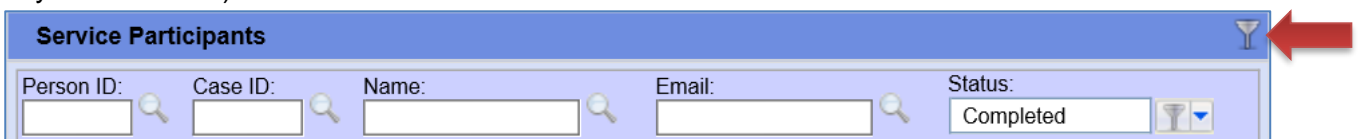
The optional parameters can be used one-at-a-time or together to filter the participants list. Once text is entered in one of the parameter textboxes, click the magnifying glass icon to filter the list.

The parameters include:

- **Person ID** – You can enter a 6-digit Person ID
- **Case ID** – You can enter a 6-digit Case ID
- **Name** – You can enter all or part of a participant’s name
- **Email** – You can enter all or part of a participant’s default email address
- **Status** – You can use the multi-select dropdown to select one or more participant statuses

Each of these optional parameters includes a tooltip to remind you how to use each filter.

Once a filter has been applied, a filter button will appear in the Service Participants header to remind you the current view is filtered. Clicking the button will reset all parameters (i.e. will clear any data entered).



Search for and Add Participants

This section will detail how to search for and add individual participants. For details on how to import multiple participants from another service (current or previous) review the [Import Participants](#) section.

The first step is to click the Register Participant button on the [Service Participants](#) screen. This will allow you to search for and, if necessary, add a person to LaMPSS to register that person in the current service.

Service Participants

Person ID:
Case ID:
Name:
Email:
Status: - select -

	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

Person Search/Register Popup

The Service Registration Person Search/Register popup allows you to search for a participant in LaMPSS.

Add New Participant for □ ×

LaMPSS Organization #:

Name:

Service Registration Summary

Person Search

Last Name:

Gender: - select -

Canada/US Other

Address:

City:

Postal/Zip Code:

Phone:

SIN:

(dd/mm/yyyy)

Date of Birth:

First Name:

Person ID:

Country: Canada

Province/State: Nova Scotia

Email Address:

Age Range: To

Middle Initial:

Enter one or multiple search criteria and click Search

Any of the parameters seen on the screen can be used to search for a participant. Most often, you will likely search using Person ID, First/Last Name, or Social Insurance Number, but any of the parameters can be used to narrow the search results.



You must search for the participant before LaMPSS will provide the ability to add a new LaMPSS Person. This will help prevent duplicate persons from being added to the system.

A few key features of the Person Search to remember:

- LaMPSS uses cumulative searching, so the more search criteria you enter, the more defined the search results.
- Search will use a Soundex ability when Last name and/or First name are entered. Soundex allows similar sounding names to be displayed in the search results.
- Partial searching is available for First Name, Last Name, and Address.
- First Name and Last Name will also search through any aliases (i.e. nicknames or alternate/previous) names.

Once a search is completed, there are several possible outcomes:

- If you search by **Person ID** or **Social Insurance Number** a message will display to indicate all other search criteria will be ignored. If a match is found, the Person Search Results will display the result. Click on the person to complete the registration in the current service. You will be returned to the Service Participants screen.
- If the search returns **multiple results**, the Person Search Results module will display below the search criteria. The first 100 results will be returned with 10 records per page. The Person Search Results provide key information to help you identify the correct participant.
 - To register a participant from the Person Search Results, click on the blue, hyperlinked name.
 - If the participant is not found in the Person Search Results, the required person data can be entered in the search criteria fields and the **Add New Participant** button selected to create a new LaMPSS Person and add them to the service.

The screen on the next page is an example of a search with multiple results.



This example also shows how Soundex will return results that “sound like” the name entered in the search criteria (i.e. Johnson and Johnston).

Add New Participant for □ X

Person Search Search Time: 14 seconds, 822 milliseconds

Last Name:
First Name:
Middle Initial:

Gender:
Marital Status:
Person ID:

Address Type:
 Canada/US
 Other

Care Of:
Line 2:
Line 3:

City:
Country:

Postal/Zip Code:
Province/State:

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	

To add a new LaMPSS Person, the required fields are:

- Last Name
- First Name
- Gender
- Address (including city and postal code)
- Date of Birth

Although SIN is not a required field to add a Person to LaMPSS, it may be required by some programs to register a participant. You may encounter an error preventing you from adding the participant to a service if SIN is required but not provided.

Once these fields (at a minimum) are completed, click the Add New Participant button to add the person to LaMPSS and simultaneously register the participant in the service.



An easy reminder of the required fields is to click the Add New Participant button. Error messages will display at the top of window indicating the required information.

Service Registration Summary

Errors:

- You must enter a Last Name
- You must enter a First Name
- Gender must be indicated
- Address is required
- A city name is required.
- A valid postal/zip code is required.
- Date of Birth is a required field.

As a best practice, enter as much information as possible. It will be important to have contact information for the participant.

As part of adding the person to LaMPSS, the system will guide you through the process of sharing the person with government and merging records, if potential matches for the person are found. The steps for this process are detailed in the following pages, showing examples where a merge is and is not required. For more information on why it's necessary to share a person, see the section on [Public and Private Persons and Services](#).



Share Person

If the service is not private, LaMPSS will automatically guide you through the process of sharing the person with government.

If no potential matches for the current person are found in LaMPSS, a message will display and you will click Next to continue with the sharing process.

Person Merge

No matches found for this client in the Nova Scotia Government records. Use the Next button below to share the person info with the Nova Scotia Government.

Next  Cancel 

If potential matches are found, LaMPSS will display the Person Merge screen with Potential Matches listed.

Person Merge

One or more persons already exist in the Nova Scotia Government records who match this client. Please select the appropriate match from the results below.

Potential Matches

Name	Gender	Address	Date of Birth / Date of Death	SIN
<input checked="" type="checkbox"/> Smith, Billy	Male	[REDACTED]	Jan 24, 1974 Age: 36	[REDACTED]
<input type="checkbox"/> Smith, William	Male	[REDACTED]	Mar 15, 1968 Apr 15, 2010 Age: 42	[REDACTED]

Displaying results 1 – 2 of 2

The name, gender, address, date of birth and Social Insurance Number (if known) will be displayed to help you determine if one of the records is a match for the person you are adding.

Once you review the Potential Matches, select the checkbox beside the desired person and click Next to continue. LaMPSS will display your record side-by-side with the existing shared record.

Your Record Person: Smith, Billy	Provincial Shared Record Person: Smith, Willy
Please verify or modify the selections below to ensure the records are correctly merged.	
<ul style="list-style-type: none"> <input type="radio"/> Date of Birth: Jan 24, 1974 <input type="radio"/> Age: 36 <input type="radio"/> Last Name: Smith <input checked="" type="radio"/> First Name: Billy <input type="radio"/> Middle Initial: <input type="radio"/> Gender: Male <input type="radio"/> SIN: <input checked="" type="radio"/> Marital Status: Married <input type="radio"/> Service Language: English <input type="radio"/> Other Language: English 	<ul style="list-style-type: none"> <input type="radio"/> Date of Birth: Jan 24, 1974 <input type="radio"/> Age: 36 <input type="radio"/> Last Name: Smith <input type="radio"/> First Name: Willy <input checked="" type="radio"/> Middle Initial: R <input type="radio"/> Gender: Male <input type="radio"/> SIN: 500 162 321 <input type="radio"/> Marital Status: Single <input type="radio"/> Service Language: English <input type="radio"/> Other Language: English <div style="border: 1px solid black; padding: 2px; font-size: x-small; margin-top: 5px;"> Modified By: JOHNSOMA Modified Date: Mar 11, 2011 </div>
Address Information	
Type Address	Type Address

You will need to review the information for each record and use the radio buttons to modify the selections if necessary, to ensure the information is up-to-date and the records are merged correctly.

When you have verified all information, click the Merge button at the top or the bottom of the screen. LaMPSS will display a message requesting you to confirm you wish to proceed with the merge and share the person information with the Nova Scotia government. Click OK to complete the process.

At this point, the person will be registered as a participant in the selected service and you will be redirected to the Service Participants screen.

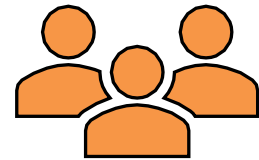
You will still need to Save the Service Participants screen to complete the change. If you try to navigate away without saving you will receive a warning message.

Public and Private Persons and Services

Both a LaMPSS Person and a service can be private or public. **Most persons and services will need to be public so they can be included in any accountability or activity reporting for your funding agreement with government.**

When a service is created, the visibility is set to private or public on the [Service Details](#) screen. If a service is setup as private, it will not be linked to any of your organization's funding agreements and is not visible to internal government LaMPSS users. Private services should only be used if you wish to manage services and participants for non-funded activities.

When a person is added to LaMPSS by an external user, the person is initially visible only to other users from the same organization. Through the Share Person functionality, the person can be shared with government. As a part of the process, LaMPSS will search other shared person records to make sure the person has not already been created by another service provider. If so, you will be presented with option to merge your newly added person with the existing person in LaMPSS.



To be eligible to participate in funded services (i.e. public services), a person must be shared with government. If you attempt to register a private person in a funded service, LaMPSS will display an error message notifying you the person must be shared with government before they can be registered in the current service.

Business Rules for Registering a Participant

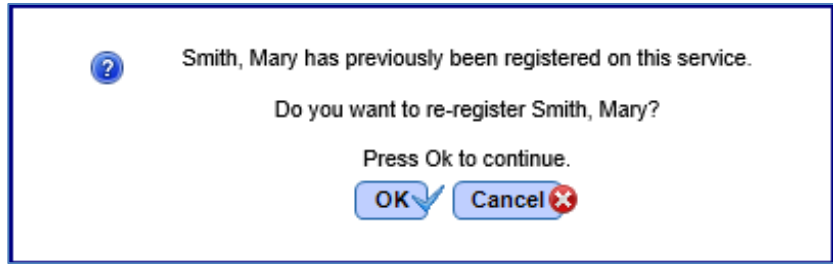
Before a participant is added to a service, LaMPSS will check to ensure several business rules are met.

If the selected participant is already registered in the service, an error message will be displayed

For Group (Continuous) and Individual services, if the selected participant has been registered in the service in the past, a warning message will be displayed.

The message will inform you the participant has previously been registered and confirm you want to re-register the same participant.

If you select OK, a second instance of the participant will be added to the Service Participants list.



A participant can only be re-registered if the Session Dates do not overlap.

The screen below shows an example of this scenario. Use the Show History button to see a full list of current and past participants.

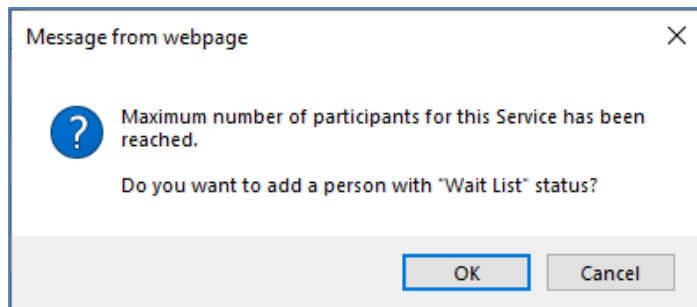
Person ID	Case ID	Name ▲	Email / Phone	Additional Information	Sessions / Last Session	Status
<input type="checkbox"/>	348860	→ Smith, Mary	mary@fakeemail.ca (555) 555-5555	0/19 Fields	0	Registered
<input type="checkbox"/>	348860	→ Smith, Mary	mary@fakeemail.ca (555) 555-5555	9/19 Fields	2 Oct 16, 2020	Did Not Complete



The ability to add a participant multiple times in a Group (Continuous) or Individual services was added as part of Release 3.4.2 in November 2020. This will be useful where a participant is registered in and completes a service (or perhaps cancels/does not show), but later within the same service/funding agreement requires assistance again.

For Group (Fixed) services, LaMPSS will verify the maximum number of participants has not been reached.

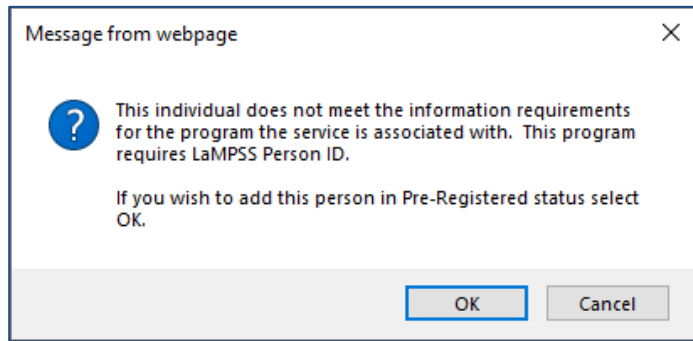
If the maximum has already been registered, a warning message will display. If you select OK on the warning, the participant will be registered in the service with a status of "Wait List".



See the [Wait List](#) section for more information on how to manage participants on the wait list.

Finally, 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 will be given the option of [pre-registering](#) the participant.



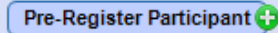
Pre-Register a Participant

To register a participant, they must be a LaMPSS person and they must meet any specific registration requirements of the funding program. If you do not have sufficient detail to create a LaMPSS person record for a participant, you can reserve a spot in a service using the Pre-Register functionality.

To pre-register a participant, only the first name, last name, and either phone number or email address are required.

Once you select Register Participant on the Service Participants screen and the Add New Participant screen appears, the first step will still be to search for the desired participant to determine if they exist in LaMPSS.

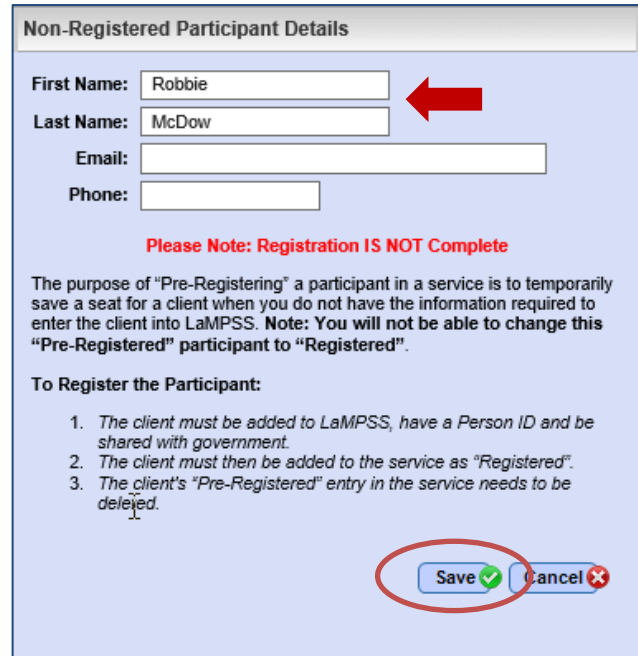


If the participant is not returned in the Person Search Results, the  button will allow you to add the participant in Pre-Registered status.


Click the Pre-Register Participant button to access the popup seen here and complete the entry.

As noted in the popup, the purpose of pre-registering is *only* to save a spot for the participant in the service.

To later register the participant, once the information is available to create a LaMPSS person, you will register the newly created (and shared) person and then remove the pre-registered version of the participant.



Non-Registered Participant Details

First Name: 

Last Name:

Email:

Phone:

Please Note: Registration IS NOT Complete

The purpose of "Pre-Registering" a participant in a service is to temporarily save a seat for a client when you do not have the information required to enter the client into LaMPSS. **Note: You will not be able to change this "Pre-Registered" participant to "Registered".**

To Register the Participant:

1. The client must be added to LaMPSS, have a Person ID and be shared with government.
2. The client must then be added to the service as "Registered".
3. The client's "Pre-Registered" entry in the service needs to be deleted.

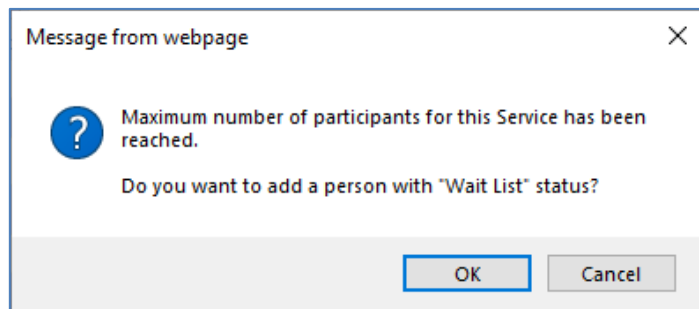
You cannot change a pre-registered participant to registered.

Managing Wait Lists


Each Group (Fixed) service is setup with both a minimum and maximum number of participants.

When a service reaches its maximum number of registered participants, you can continue to add participants to the service, but they will have a status of Wait List and a wait list number. This enables you to track clients waiting for a service, in the order they are added.

To add a participant to the wait list, follow the normal steps to [search for and add a participant](#). When you select a participant to add to the service, if the maximum number of participants have already been registered, a warning message will display.



Message from webpage

 Maximum number of participants for this Service has been reached.

Do you want to add a person with "Wait List" status?

If you select OK in this popup, the participant you are about to search for is added to the list of service participants; however, the status is Wait List instead of Registered.

The first participant added to the wait list will have a wait list number 1, the second participant added will have a wait list number 2, and so on.

The Service Participants list seen here has 2 participants in Wait List status.

Service Participants

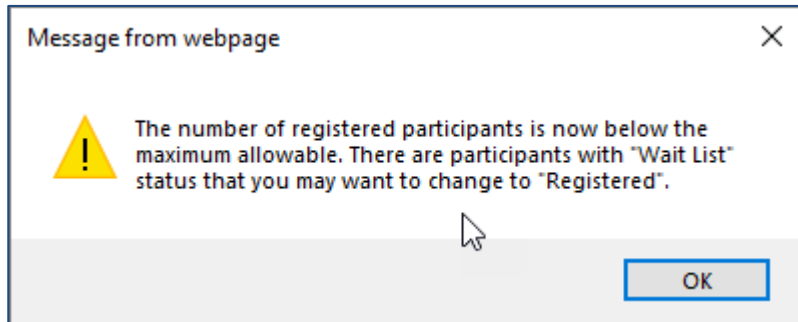
Person ID:
Case ID:
Name:
Email:
Status: - select -

Person ID	Case ID	Name ▲	Email / Phone	Additional Information	Status	Wait List
<input type="checkbox"/>	348865	Cerone, Alex	alex@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	
<input type="checkbox"/>	348866	Jabbour, Victoria	(555) 555-5555	0/19 Fields	Wait List	1
<input type="checkbox"/>	348867	MacDonald, Mac	(555) 555-5555	0/19 Fields	Wait List	2
<input type="checkbox"/>	348864	McDow, Robbie	robbie@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	
<input type="checkbox"/>	348861	Gallant, Betts	bg@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	
<input type="checkbox"/>	348859	Johns, Jessica	jessica@fakeemail.ca (555) 555-5555	0/19 Fields	Registered	
<input type="checkbox"/>	348858	Smith, Joe	(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 - 8 of 8

[Remove](#)
[Register Participant](#)
[Import Participants](#)
[Show History](#)

If a Registered participant is removed from this service, LaMPSS will display a message to remind you that the number of registered participants is now below the maximum and there are participants in wait list status that you may want to register.



While LaMPSS will not automatically switch a participant to registered status, it will remind you.

In the Service Participants list, find the participant you want to register. If there are multiple participants on the wait list, you can use the wait list number to determine who should have priority for the service.



Since there are many factors that could determine which participant should be registered next, LaMPSS does not enforce the wait list order. For example, perhaps one participant has a higher need for the service or the next participant in “line” cannot be reached to confirm availability.

To change a participant from Wait List status to Registered, click on the hyperlinked status name.

<input type="checkbox"/>	348866	Jabbour, Victoria	(555) 555-5555	0/19 Fields	Wait List
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This will take you to the [Service Registration Additional Information](#) screen for the participant. In the dropdown menu at the top of the screen, change the Participant Status to Registered and Submit, then save the Service Participants screen.

Adding Sessions for Individual Services

Once a participant has been added to an Individual service, at least one session must be added before you can save the Service Participants. See [Update Participant Sessions](#) for instructions on adding a session.

Import Participants from Another Service

[Search for and Add Participants](#) explained how to search for and add participants one-by-one. You can also bulk import the participants from another service offered by your organization. The steps to search for and select participants to import are detailed in this section.



This feature can be used to save time and effort when a similar group of participants needs to be registered in another service. It eliminates the need to individually search for each participant, allowing multiple participants to be registered at the same time.

To access the Import screen, select the Import Participants button on the Service Participants screen. The Import Participant Service Search will display.

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	

Select Import Participant Search Criteria

The import screen enables you to search for existing services as the source of participants to be imported.

You can search by Accountability Reporting (i.e. funding agreement) and/or Service Name.

Accountability Reporting is a dropdown menu displaying a list of funding agreements for your organization, while Service Name is a text field where all or part of a scheduled service name can be entered.

For an Individual service, you will also need to enter a First Session Date. This date will not affect the search results, but will be used later to register any selected participants in the service so dates do not need to be entered manually for every participant.

Review and Select Service(s)

The Service Search Results section of the Import Participant popup displays the results of the search. If no matches are found, a “No services found” message will display.

The list will display 50 rows per page. Results are sorted by the Service Name and the date/time. You can change the sort order of the row by clicking on any of the column headings, or further refine your search criteria.

An example of the search results is pictured here:

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

Displaying records 1 - 2 of 2

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.

Select and Register Participant(s)

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. See [Import Participant Warnings and Errors](#).

This list will display up to 50 results per page, sorted by the participant’s last name, then first name. Once again, you can change the sort order by clicking on a column heading.

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.

The options are to only register the participant(s), or to register and also copy any available intake information (see [Service Registration Participant Additional Information](#) for more details on intake information)

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

Click OK and you will be returned to the Service Participants list, showing the added participant(s).

For Individual services, a Session will also be added with the first session date indicated in the import.

Import Participant Warnings and Errors

With the in-depth functionality and many possible scenarios included in the import participants functionality, come a wide range of possible warning and errors message you may encounter, depending on the situation.

LaMPSS will not display a selection checkbox in the import popup for a participant that does not meet the necessary conditions for the service.

The requirements will change depending on what is required under your funding program. Examples of this include:

- The person is already registered in the Group (Fixed) service or is registered and has not been completed in a Group (Continuous) or Individual service.
- The person is Private and must first be shared with government
- A Case ID is required – an active case must exist for the person to allow registration
- SIN is required – a Social Insurance Number must be entered for the person to allow registration

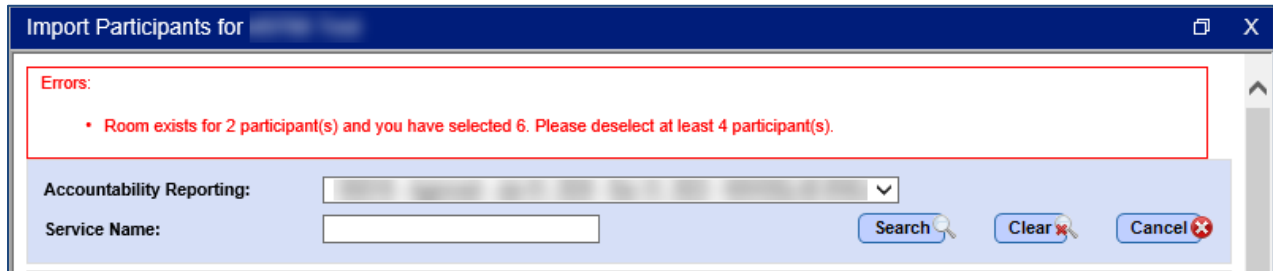
An error message will appear in red text in the Service Participant list, as seen below. Note the selection checkbox is hidden.

Service Participants				
<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	

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Another possible error is when there is not enough room in the Group (Fixed) service for the number of participants you have selected to import. There are multiple ways to resolve this error:

- If it's possible to increase the maximum participants, exit out of the import popup and follow the steps outlined earlier in this guide to change the [Service Details](#).
- Alternately, deselect enough participants to bring the total number of participants down to the maximum. The error message will tell you how many participants you must deselect.



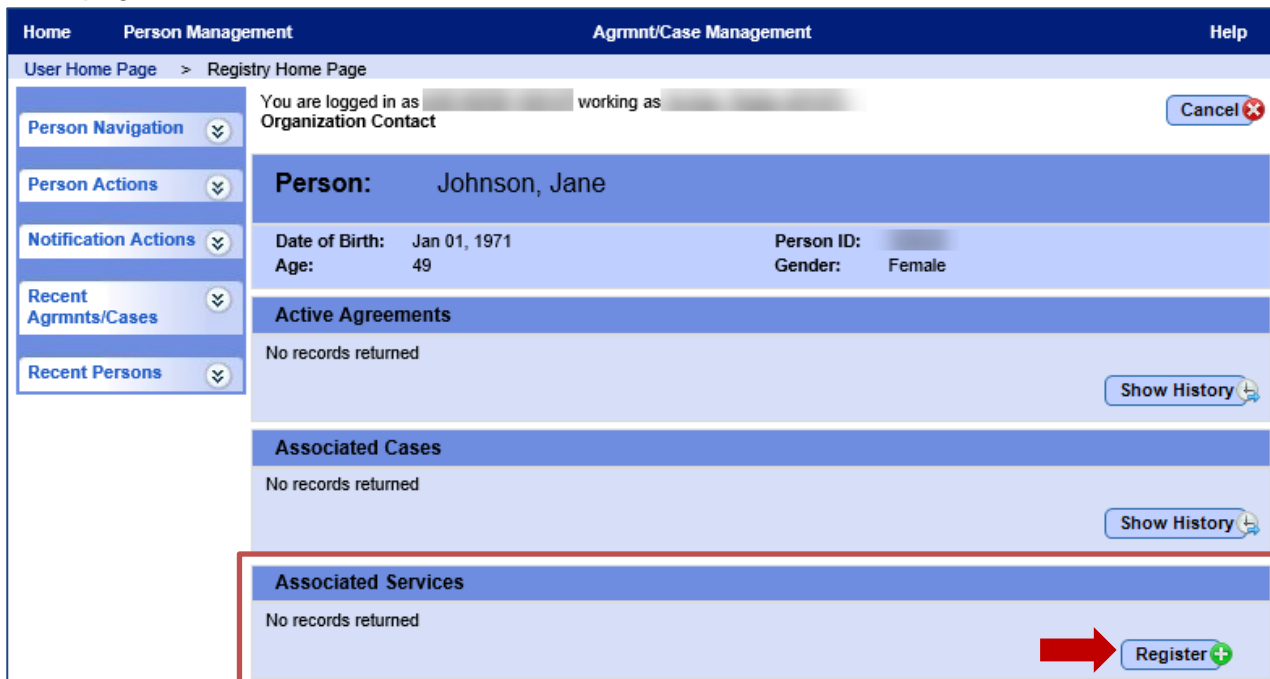
Finally, LaMPSS will display a warning when one of the selected participants has already been registered in the service, when the Service Type is Individual or Group (Continuous).

It is only a warning, not an error, because participants can be registered more than once. LaMPSS will display a popup warning to confirm you want to register the participant in the service again. For more detail see [Business Rules for Registering a Participant](#).

Register from the Person Homepage

A person can also be registered in services from the Person Homepage. The Service Participant Registration popup allows you to search for services and then register the current person in one or more of those services.

To access the popup, click the Register button in the Associated Services section of the Person Homepage, as seen below.



Service Participant Registration Popup

When you select Register, the popup will appear. The header of the popup will remind you of the name of the person you are working with and their Person ID.

The Service Search section of the Service Participant Registration popup allows you to search from scheduled services provided by your organization. You can use the Accountability Reporting dropdown to filter the search results by selecting one funding agreement.

There is also an optional text box to filter search results by entering full or partial text of a service name.

Person - Johnson, Jane (349845)

Organization: [blurred]

Accountability Reporting: - select -

Service Name: [text box]

Search Clear Cancel

Clicking the Search button will initiate the Services Search.

If services are found that match the search criteria, they will be displayed in the Search Results section of the screen.

Person - Johnson, Jane (349845)

Organization: [blurred]

Accountability Reporting: [blurred]

Service Name: [text box]

Search Clear Cancel

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

The Service Search Results will display the results of the search or, if not matches are found, the message “No services found” will display.

The list will display 30 rows per page, sorted by the Service Name and Service Date/Time. You can change the sort order by clicking on any of the column headings.

The information displayed will include:

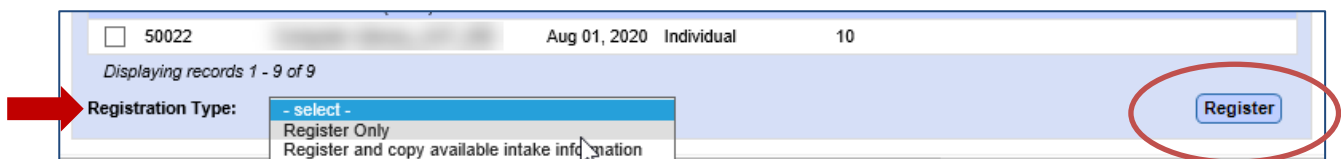
- **Service ID** – The unique identifier for the service. A tooltip on this field will display the funding agreement ID and Service Type.
- **Service Name**
- **Service Format**
- **Participants** – A system-generated count of participants currently registered in the service (includes Completed, Pre-Registered, Registered, and Wait List)
- **Warnings/Errors** – If the person does not meet the registration requirements for the service a message will be displayed to indicate what is missing.
- **Registration Type** – A required dropdown that allows you to indicate whether, if this service is selected, to register the participant or register the participant and copy any available intake information.

A selection checkbox will appear for each service where the current person meets the service registration participant requirements and no other errors are present.



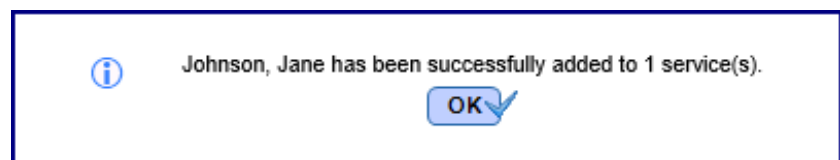
If they do not meet one or more requirements for your funding program (e.g. the program requires the participant to have a SIN recorded in LaMPSS, but the current participant does not have a SIN entered) the checkbox will not be available.

Once you have selected one or more services, click the Register button to register the person in those services and, if selected, copy any available intake information.



A confirmation message will appear when the person is successfully added.

Click OK and you will be returned to the Person Homepage where you will now see the newly registered services in the Associated Services section.



Service Participant Registration Popup Warnings and Errors

Depending on the requirements of the service and the information available for the participant, there are several warning and errors messages you may encounter, depending on the situation. These messages will display in the Service Search Results section.

You may see error messages for any of the circumstances outlined below. You will be unable to continue with the registration in the service:

- If the program for the selected service requires a Case ID and the person does not have an active case.
- If the program for the selected service requires a SIN and the person does not have a SIN entered in LaMPSS.
- If the person is already registered in the Group (Fixed) service or is already registered in an Individual / Group (Continuous) service and still has a status of Registered.
- If the person is already registered in the Group (Fixed) service and is on the wait list.
- If the current service is funded by government under an accountable agreement and the person you want to add has not yet been shared with government.
- If the maximum number of participants has already been reached for a Group (Fixed) service.

There are also a couple of warning messages that may display. Unlike an error message, you can continue by clicking OK. You will receive a warning message if the person is already registered in the Individual / Group (Continuous) service, as well as if the end date of the service is in the past.

It is only a warning, not an error, because participants can be registered more than once. For more detail see [Business Rules for Registering a Participant](#).

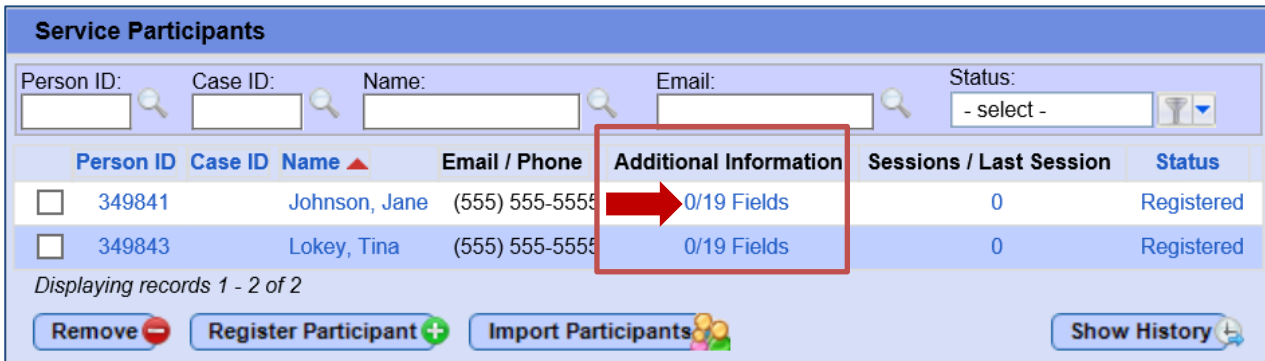
Update Participant Additional Information

Additional participant information, beyond just service participation, can be captured using service registration. If the funding program requires additional information to be collected, the Service Registration Intake Form will generate with the appropriate fields to collect the information and the Additional Participant Information screen (hyperlinked from Service Participants) will be configured to capture it.



Any questions about the additional information for a specific funding program should be directed to your program area contact/representative.

To access the Additional Participant Information screen for a participant, click the hyperlinked text within the Service Participants list, as seen below.



Person ID	Case ID	Name	Email / Phone	Additional Information	Sessions / Last Session	Status
<input type="checkbox"/>	349841	Johnson, Jane	(555) 555-5555	0/19 Fields	0	Registered
<input type="checkbox"/>	349843	Lokey, Tina	(555) 555-5555	0/19 Fields	0	Registered



The text will display as “XX/XX Fields”. The first number indicates the number of additional information fields that already have a response while the second number indicates the total number of additional information fields enabled for the program.

Selecting the hyperlink in the Sessions/Last Session or the Status column will also navigate to the Additional Participant Information screen. An example of this screen is pictured on the next page.

This screen has three main sections:

- **Participant** – The top section displays the name of the participant currently being viewed and a [Participant Status](#) dropdown
- **Session Schedule OR Participant Start/End Dates** – For Individual services the middle section displays any sessions recorded for the participant and provides the ability to [Add Session](#). For Group (Continuous) services the middle section provides the ability to [capture Participant Start and End Date](#).
- **Additional Participant Information** – The final section will list any additional information elements required for the funding program. This section may look very different from program to program, depending on the reporting requirements. For each information element there will be a short description, a tool tip providing more detail, and a field (e.g. numeric, dropdown) to provide a response.

Participant - Johnson, Jane

Participant Status: Registered ▼

Session Schedule

No records returned

(dd/mm/yyyy)

Add Session +

31

Delete -

Additional Participant Information

Designated Group - Aboriginal Identity:	i	-	- select -	▼
Designated Group - Immigrant:	i	-	- select -	▼
Designated Group - Persons with Disabilities:	✓	i	- select -	▼
Designated Group - African Nova Scotian:	✓	i	select	▼

Additional Participant Information elements are organized into groupings like designated groups, disability type, pre-intervention information, immediate outcome, etc.

Fields marked with a checkmark must have a response before you will be able to change the participant's status to complete. These are the required fields for the funding program the service is delivered under.



The tooltips for each information element provide some additional detail on what information a field will capture, but any further questions for a funding program should be directed to your program area contact/representative.

If you have information to enter on more than one participant, the Previous and Next buttons at the bottom of the screen will allow you to move through the list of participants, one-by-one, without returning to the main Service Participants screen each time.

Immediate Outcome - Hours Worked / Week:	✓	i	<input type="text"/>
Immediate Outcome - Avg Weekly Earnings:	✓	i	<input type="text"/>
Immediate Outcome - Primary Withdrawal Reason:		i	- select -
Immediate Outcome - Withdrawal Date:		i	<input type="text"/> 31

Previous
←
Next
→

Submit
✓
Cancel
✗

When all updates have been made, use the Submit button to return to the Service Participants screen.



To save the information entered, you need to click the submit button on the Additional Participant Information screen and **also** Save the main Service Participants screen.

When you return to the Service Participants screen, the Additional Information column will have updated to reflect any information, sessions, and/or status changes made on the Additional Participant Information screen.

Service Participants						
Person ID:	Case ID:	Name:	Email:	Status:		
Person ID	Case ID	Name	Email / Phone	Additional Information	Sessions / Last Session	Status
<input type="checkbox"/>	349841	Johnson, Jane	(555) 555-5555	9/19 Fields	1 Oct 19, 2020	Registered
<input type="checkbox"/>	349843	Lokey, Tina	(555) 555-5555	0/19 Fields	1 Oct 19, 2020	Registered

Copy Additional Participant Information

If the participant you are registering has previously participated in a service where additional information elements were collected, the Copy Previous Intake button may appear at the top of the Additional Participant Information section

Additional Participant Information	
<input type="button" value="Copy Previous Intake +"/>	
Designated Group - Aboriginal Identity:	<input type="button" value="i"/> - select -
Designated Group - Immigrant:	<input type="button" value="i"/> - select -
Designated Group - Persons with Disabilities:	<input checked="" type="checkbox"/> <input type="button" value="i"/> - select -

For each funding program in LaMPSS, certain additional information elements have been configured to allow for them to be copied forward from a participant's previous service. These are typically things that would not change over time, such as membership in a designated group.

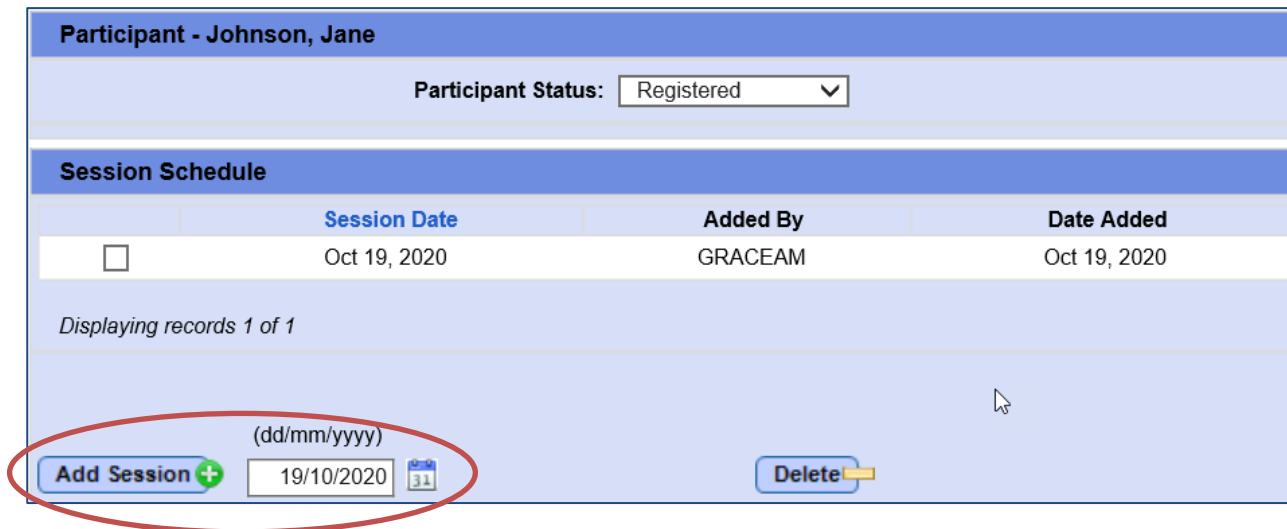
What information is copied will be different from program to program, but this feature can be used to quickly move forward known information instead of re-entering it

Update Participant Sessions – Individual Only

For Individual services, sessions are recorded to capture information about when a participant attended/participated in the service. The participant is registered in the service *once*, then sessions are used to capture instances of their involvement (e.g. each appointment or meeting)

A minimum of one session needs to be recorded before the participant can be saved in the service.

To add a session, choose a date using the calendar icon beside the Add Session button. Then click Add Session.



Participant - Johnson, Jane

Participant Status: Registered

Session Schedule

	Session Date	Added By	Date Added
<input type="checkbox"/>	Oct 19, 2020	GRACEAM	Oct 19, 2020

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(dd/mm/yyyy)

Add Session + 19/10/2020 [Calendar Icon] Delete [Trash Icon]

You can add one or multiple sessions at a time. The date added and the username of the person who added a session will display.



The session dates must fall within the start date and end date of the accountable agreement the service is funded through. If they do not, an error message will be displayed when you try to add the session(s).

If the participant was previously registered in the current service (see [Business Rules for Registering a Participant](#) for more detail on this scenario), the new session dates cannot overlap the session dates from their previous participation in the service. If they do, an error message will be displayed when you try to add the session(s).

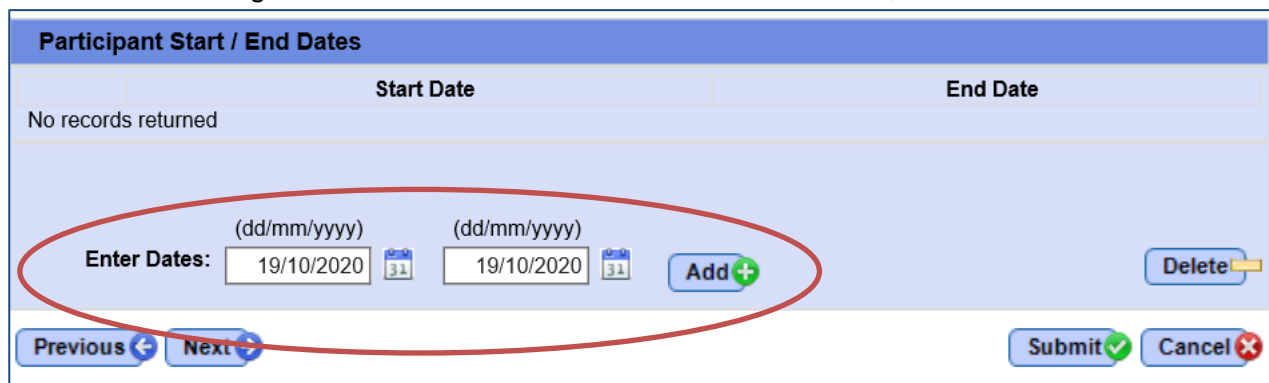
To delete a session, select the checkbox beside the session and then click the Delete button.

Update Participant Start/End Dates – Group (Continuous) Only

For Group (Continuous) services, participant start and end dates are recorded to capture when a participant began and finished their involvement in the service.

The service may take place over a long period of time while a specific participant may only attend for part of that time (e.g. a group service delivered for a 1 year period, but a participant only attends for 3 months).

Choose dates using the calendar icons beside the Enter Dates label, then click the Add button.



Participant Start / End Dates	
Start Date	End Date
No records returned	
Enter Dates: (dd/mm/yyyy) <input type="text" value="19/10/2020"/>	(dd/mm/yyyy) <input type="text" value="19/10/2020"/>
<input type="button" value="Add +"/>	
<input type="button" value="Delete"/>	
<input type="button" value="Previous"/> <input type="button" value="Next"/>	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	



The participant start date and end date must fall within the start date and end date of the accountable agreement the service is funded through.



If a participant is re-registered in the same service, having previously participated, the new dates cannot overlap the dates from their previous participation in the service. If they do, an error message will be displayed when you try to add the session(s).