Employment Assistance Services Reporting

This document has been prepared to provide information on the reporting relationship between LaMPSS Release 1 organizational agreement functions and LaMPSS Release 2 case management functions. It will provide guidance regarding expectations in use of the system and reports submitted to Employment Nova Scotia.

Eligible employment services that an organization chooses to deliver comprise activities that are articulated in the Careers Nova Scotia Centres (CNSC) agreement. Once these activities are defined, the group and individual services should be set up in Enhanced Services in order for the organization to record and track counts for each service. By recording these services in Enhanced Services, the LaMPSS generated *EAS Activity Report* and the *Enhanced Services Report* (available on the Organization Home page to those with the "Management" security role) will provide details on the specific counts for reporting.

Enhanced Services /Interventions Reporting

As described above, Enhanced Services is where clients are recorded for those services articulated in the CNSC agreement. Its purpose is two-fold – to track counts for these activities, and to serve as a scheduling tool for advance registration of appointments and workshops.

For clients that have progressed to the action plan stage, documentation of these same services is also required as interventions in the action plan. This serves a different purpose. Action plan interventions allow for follow-up reminders (Tasks or Notifications) for the case manager, they identify funding sources, and most importantly, they provide accountability measures towards Nova Scotia reporting obligations to HRSDC.

The relationship between Interventions that you record in a client's action plan and the entries you make in Enhanced Services, for services your organization has delivered In House, is not always a one-to-one relationship. As you recall, the intervention delivery model can be In House, External, or Self-Managed. Only those interventions that are delivered "In House" are suitable for documenting as a corresponding Enhanced Services item (Assessment-Diagnostic Referral is an exception to this).

Sometimes an action plan intervention could be a simple one-time event with the client. This would then require only one entry in Enhanced Services as a single appointment. But other times an intervention, perhaps such as Career Counseling, can also be planned for a period of time – a day, a week, a month, etc., and during this time there may be a series of appointments with the client. So one intervention could yield any number of Enhanced Services appointments. Each appointment is a separate entry in Enhanced Services, so overall; number of Enhanced Services visits will typically be higher than the number of Enhanced Services (Individual) participants.

Note, that your organization may have set up more than one entry under one Enhanced Services Individual type, to represent different subject areas within that activity type. A good example may be Job Search-Individual. A single action plan intervention for Job Search Individual, may have sessions recorded in Enhanced Services under more than one session name, i.e., Job Search Individual-Resume Writing, Job Search Individual-Mock Interviews, Job Search Individual-Internet Job Search, etc. (depending on how you have them set up and how the titles are worded). Separate entries under Enhanced Services Individual can also be used to represent different service locations for a particular activity type.

Also note that this is why the count of participants showing for any Enhanced Services Individual item on the LaMPSS generated *EAS Activity Report* is unlikely to be equal to the number showing for "Started (this period)" under the corresponding intervention in the Case Interventions section for a number of reasons:

- First of all, interventions where the delivery model is "External" or "Self-managed" should never be recorded in Enhanced Services. Only the "In House" type interventions are.

- Secondly is the selected Date Range for the report. An intervention may have started in the previous reporting period, so there's no count again for the current period under Case Interventions. But at the same time, appointment(s) in the current period for this particular service would be recorded under Enhanced Services Individual and therefore show as a participant count under this section of the *EAS Activity Report*.

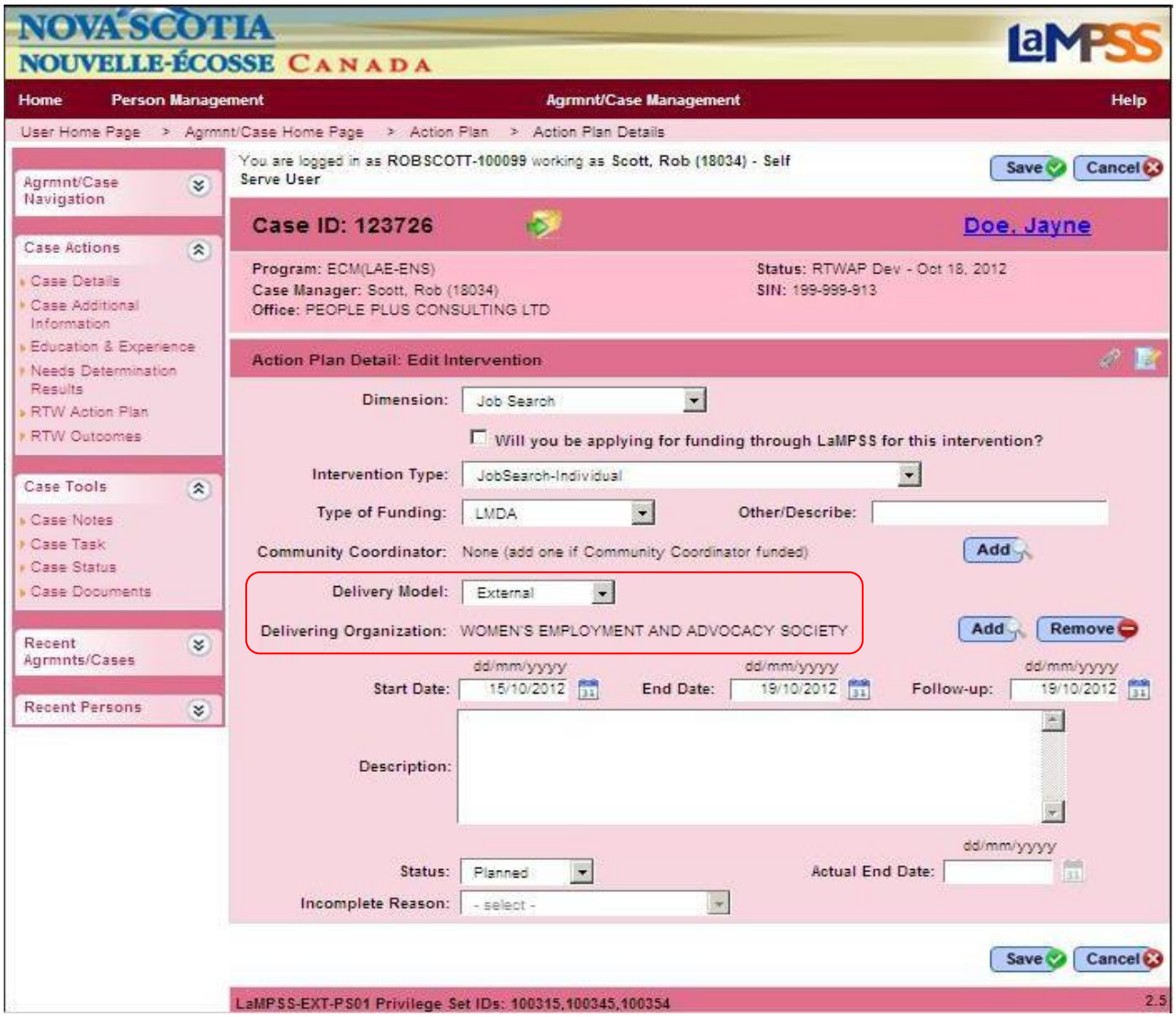
- Finally, there may be instances where a client is case managed by another CNSC service provider, and they send the client to you for an Intervention service only. The originating case manager records the intervention in their action plan (as externally delivered), and a count shows up under the Case Interventions section of <u>their</u> *EAS Activity Report*. Your organization delivers the service and records it in Enhanced Services so that a count shows up under Enhanced Services on <u>your</u> *EAS Activity Report*. In this sense the two counts are split with the other organization.

In an example like this, it's important for the case manager at the originating organization to correctly identify the "Delivering Organization" on the intervention screen. By doing so, LaMPSS shares or opens up the view of the client's Person Record so that a Business Partner does not need to create a case but has enough access to enter the client in the appropriate Enhanced Service referred to. In this case the originating organization maintains the case management and the second organization can capture the Enhanced Service statistic.

If you have a client referred to you by another CNSC service provider for an intervention only and you are unable to find the client in your Person search, try contacting the case manager and see if they have correctly flagged your organization on the action plan intervention.

In Figure 1 below, a fictitious scenario has been created to illustrate this example. The case managing organization is People Plus. They are referring the client, Jayne Doe, to Women's Employment Outreach for a Job Search Individual intervention. WEO has had no previous record of the client. By identifying WEO as the "Delivering Organization" on the intervention as highlighted below, the Person record for Jayne will be opened up to WEO. When WEO documents the service in Enhanced Services, they won't have to recreate the Person record and case because the view has been opened to them.

Figure 1



Currently, the Enhanced Service Individual section of the *EAS Activity Report* provides a count of Unique Participants, Unique Participants New This Period and Number of Visits. But in order for the count to

register here, the Enhanced Service entry must have the date the service was delivered and the status recorded as "Complete". Failure to do either of these will not trigger a count on the *EAS Activity Report* for that entry.

The counts provided for the Case Interventions section (Started and Completed) of the *EAS Activity Report* are not unique participant counts. It's a count of interventions. One client could have multiple counts for the same intervention type, i.e., two or more Job Search Individual interventions in their action plan.

Case Management Life Cycle Statistics:

What? Case managers should remember to keep their cases moving forward through the case management life cycle, as information is collected, barriers identified, and action plans are developed, put into motion, and concluded.

How? The key to doing this is by completing the Task that each case status displays, as work on the file is documented. Every active case has a task (reminder) which displays on the Case Home page, and also on the case owner's User Home Page. These tasks prompt the user to move the case forward at each stage of the life cycle. The task names are:

1. Complete Intake
2. Complete Assessment
3. Develop Action Plan
4. Close Action Plan
5. 24 Week Outcome
6. 52 Week Outcome

Why? By completing each task along the way, counts are automatically assigned by LaMPSS for each status, and they display on the Case Statistics section of the *EAS Activity Report*. The counts under the heading "Completed (this period)" can be transferred to the organization's quarterly EAS Report under the corresponding sections for Case Mgmt.-Assessment, Case Mgmt. RTWAP1_Development, Case Mgmt. RTWAP2_Management, and Case Mgmt. RTWAP3_Follow-up (as circled in red in Figure 2).

Figure 2

Note: the LaMPSS user does not actually "complete" the task when the case is in Follow-Up Status. The "24 Week Follow-up" task and the "52 Week Follow-up" task disappear automatically when the user records the 24 week outcome or the 52 week outcome (via the RTW Outcome screen).

EAS Activity Report

[redacted]

Cases

Carry Forward (previous periods)	New Cases (this period)	Total Closed (this period)	Total Ongoing (as of report run date)	Employed Outcome (this period)
57	21	11	110	0

Intake

Carry Forward (previous periods)	Started (NEW this period)	Completed (this period)	Status Complete Reason	Total (this period)	Total Ongoing (as of report run date)
0	21	7	Assessment - Intake Process Complete	5	28
			Closed - Abandoned	1	
			Closed - Self Serve Only	1	

Assessment

Carry Forward (previous periods)	Started (NEW this period)	Completed (this period)	Status Complete Reason	Total (this period)	Total Ongoing (as of report run date)
10	5	11	RTWAP Dev - Assessment completed	10	13
			Closed - Action Planning not viable	1	

RTWAP Dev

Carry Forward (previous periods)	Started (NEW this period)	Completed (this period)	Status Complete Reason	Total (this period)	Total Ongoing (as of report run date)
3	10	14	RTWAP Mgmt - Developed & Signed	7	14
			Closed - Found Employment	5	
			Closed - Client not committed	2	

RTWAP Mgmt

Carry Forward (previous periods)	Started (NEW this period)	Completed (this period)	Status Complete Reason	Total (this period)	Total Ongoing (as of report run date)
43	7	1	Closed - Abandoned	1	54

Follow-up

Carry Forward (previous periods)	Started (NEW this period)	Completed (this period)	Status Complete Reason	Total (this period)	Total Ongoing (as of report run date)
1	0	0			1

Counts for Employed Results:

The case manager must complete all intervention(s) in the action plan, then record an Employed or Self-Employed result on the RTW Outcome screen, and then complete the Close Action Plan task.

(1) The primary source for employed results will be from clients with action plan interventions that lead to a RTW Outcome. The case manager must complete all intervention(s) in the action plan, then record an Employed or Self-Employed result on the RTW Outcome screen, and then complete the Close Action Plan task. An Employed result will trigger a count on the *EAS Activity Report* on the top summary line of the Case Statistics section, under the heading "Employed Outcome (this section)". See green circle on Figure 2. Sponsors can use this figure for their quarterly EAS Report form.

(2) "Employed" counts can also occur for clients whose case has not yet advanced to RTWAP Status. Such clients may have engaged in job search services such as Job Search Group or Individual. If the service provider becomes aware the client has found work and the case will not be advancing to action plan management, a "Found Employment" outcome can be documented through the **Case Status** screen on the left navigation menu, under Case Tools. The user can click the "Add" button here to invoke the option to close the case due to a number of reasons, including a "Found Employment" reason code. Note that this will close the case, there is no detail captured regarding the type of job found, and no further follow-up is required.

Counts for "Found Employment" will display under each status type in the Case Statistics section of the *EAS Activity Report*. Found Employment counts that are registered under the Intake, Assessment, or the RTWAP Dev. sections can be added to the Employed stats for the quarterly EAS Report. In the Figure 2 example, you can see five Found Employment results (circled in orange).

Conducting the 24 Week Follow-up:

Case managers and Intake-Follow-up staff are expected to conduct a reasonable effort to contact clients to find out the client's employment status at three key intervals - the end of the action plan, and at the 24 and 52 Week Follow-up intervals. That being said, it is understood that some clients may have dropped out of contact and are unreachable. The protocol for contacting clients is three attempts using a variety of methods. Once these efforts have been exhausted, CNSC's can use their professional judgment to conclude whether to:

a) record the 24 week Follow Up as "Unknown" and try contacting the client again at the 52 week interval

b) instead, close the case to "Follow-up not achievable" via the Case Status screen.

In essence, being unable to contact the client at the RTWAP Closure or at the 24 Week Follow-up intervals should not automatically be reason to close the case. This is particularly true if the results so far are Unemployed. The chances of contact may diminish, but trying again later in order to get any kind of Employed result on the case is worth considering. Any information we can collect at these follow up intervals is valuable for supporting on-going program evaluation

The importance of documenting service outcomes cannot be understated. Case managers should inform clients early in the action plan development process and at the commit / signing of the action plan on the post-action plan Follow-up that will take place at pre-determined intervals. The RTWAP print out refers to progress reporting on the Signatures page, but explicit clarification with the client is strongly recommended.

EAS Activity Reporting

The Activity Report Form is used to provide information updates at specified intervals (usually quarterly reports) on activities carried out in the CNSC organizational contractual agreement. The report prefills with basic information related to the contract and contains text boxes for your organization to provide details related to the expected and actual activity levels. These text boxes should also be used to identify any issues or discrepancies between statistics generated by the LaMPSS *EAS Activity Report* and actual activities you feel may not be accurately reflected in these statistics i.e. why expected outcomes are not achieved.

Service providers <u>must</u> use their statistical *EAS Activity Report* generated by LaMPSS to obtain the counts needed to complete their quarterly activity report form, in the box indicating the "Number of Participants" for each activity.

Types of Reports/How to Access

Reports are accessible from the Organization Home Page and are located on the left side navigation bar under Reports. The reports that are accessible to you will depend on the security profile that has been set up for you by your organization LaMPSS Administrator.

Workload Management Report:
The Workload Report provides a moment in time view of the Case Manager's case workload within the CNSC organization. Management staff can select a subset of case manager(s) and view the number of active cases in each status, overdue tasks, and tasks coming due within the next 30 days. They will also be able to view active managed interventions. You must have the Management reporting security role for this report to appear in your menu.

EAS Activity Report:
The *EAS Activity Report* is an organizational level report that provides a view of cases and statistics by activity date range for organizational CNSC agreements, and it supports CNSC agreement reporting requirements. The *EAS Activity Report* can be accessed by staff with the Management reporting security role. Users choose various report parameters to define elements of information to display prior to running / viewing the report.

This report includes sections on:
Case Details: displays a line item for each active case including existing and new cases created for the period selected. This can be quite lengthy. If all you want is a stats overview report, deselect this section when you set up the report parameters.

Case Statistics: count summaries for each case status including existing and new cases created for the period selected. Also includes a client's employed count for the period, as recorded on the "RTW Outcomes" screen for each case.

Enhanced Services / Group**:** details for service type (Job Search-Workshops), service name given (i.e. Resume Creation), start and end dates, and number of participants generated from the workshops held during the reporting period. Note only those clients with a recorded outcome of "Complete" for their session are counted for this report.

Enhanced Services / Individual**:** details for service type (i.e. Job Search-Individual), number of unique participants generated from the service type (service provided client) and outcome marked as complete in Enhanced Services. An additional count for # of Visits has been requested as an enhancement.

Case Interventions**:** Intervention and funding type, delivery mode, and number started and completed for the period selected.

Application for Funding**:** details for program selected, application status, and number of carry forward clients, started this period for the period selected, and total ongoing which is the number at the time the report was generated.

Target Groups**:** details for target group membership information drawn from client case information inputs, started this period for the period selected, and total ongoing which is the number at the time the report was generated.

Person List Report:
This report can be used by your organization to identify persons your organization is case managing. Various selection criteria can be used to filter the content of the report to a specific subset of persons. The list of persons can be used to identify a group for targeted interventions e.g. older workers, as well as to aid organizations in program and service planning. The effectiveness of the report is determined by the completeness of the entry of the client's intake and case details. Client characteristics cannot be reported out if those details have not been captured.

Helpful Webinars & Links:
Please refer to the LaMPSS EAS Resources Website for more information and training webinars.
http://www.gov.ns.ca/employmentnovascotia/programs/employment-assistance-services.asp
Training webinars are available on the following:
LaMPSS Release 2 Fundamentals
LaMPSS Release 2 Employment Assistance Services Case Management
Privacy Overview
Business Partners and Enhanced Services
Case Reporting
Management Reporting
Data Export

Please refer to the Employment Nova Scotia web site for other resources.
http://www.novascotia.ca/employmentnovascotia/forms-resources/

Resources, Reports and Publications

- Enhanced Services for External Service Providers
- EAS Activity Report