

EMPLOYMENT ONTARIO INFORMATION SYSTEMS (EOIS) - SERVICE PROVIDER USER GUIDE



COMMON ASSESSMENT USER GUIDE

Version 2.0

March 2023

DOCUMENT HISTORY

Version	Date	Description
1.0	April 2021	Initial draft
1.1	April 2022	Updated screenshots and formatting for accessibility compliance
2.0	March 2023	Updated content and screenshots

CONTENTS

- Employment Ontario Information Systems (EOIS) - Service System Manager/Service Provider User Guide 1
- Common Assessment User Guide 1
- Document History 2
- INTRODUCTION 5
 - Browser Considerations 5
 - Language 5
 - Timeout Periods 6
 - System Access 6
 - User Roles and Permissions 6
 - Acronyms 7
 - Assessment Lifecycle Diagram 7
 - Assessment Statuses 8
- Creating an Assessment 10
 - Instructions 10
- Search Page 13
 - Searching for a client 13
 - Referred clients list 16
 - Assigning/reassigning a referral 18
- Editing an assessment 21
 - Instructions 21
 - Module 1 22
 - Module 2 24
- Returning a Referral 27
 - Instructions 27
- Cancelling an Assessment 32
 - SP Assessments 32
 - SA Assessments 35
- Summary Page 37
 - Summary 37

Employment Ontario Caseworker Information	38
History page	45
Instructions	45

INTRODUCTION

This guide provides technical information to Employment Ontario (EO) service providers on how to use the Common Assessment (CA) system. Common Assessment is a digital tool administered as a questionnaire. Data collected through the tool is used to stream clients using the segmentation model. For Social Assistance clients, Module 1 of the tool will inform the creation of a life stabilization action plan, while the addition of Module 2 will inform the creation of an Employment Action Plan (EAP). The two plans will become integrated into one client action plan during Integrated Case Management (ICM). CA will also support appropriate referrals and sequencing of services through integrated case management. For Employment Ontario clients, both Module 1 and Module 2 will be administered by the service provider caseworkers and inform the creation of the EAP.

This guide does not provide information on the associated business processes/rules for using the system.

Note: All information in this guide is accurate as of the date of publication.

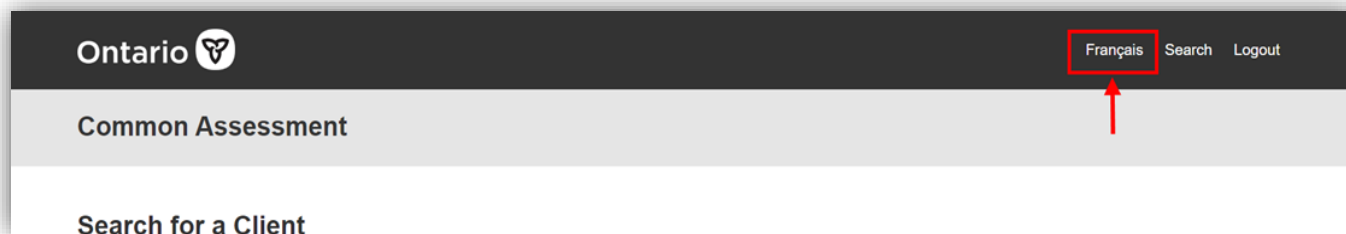
Browser Considerations

The Common Assessment tool is compatible with Microsoft Edge and Chrome. Internet Explorer is not a supported browser.

It is not recommended to use the BACK and FORWARD buttons in the web browser. Using these buttons could result in lost information and other issues.

Language

Common Assessment is available in English and French. To toggle the language, go to the [Search page](#) and select the **Français** button (which is displayed while in English mode) or the **English** button (which is displayed while in French mode). The language can only be toggled on the Search page.



Timeout Periods

A timeout is when the user is automatically logged out of the system. The timeout will occur when the system considers the user to be inactive. In order to be active, a user must have clicked on a link or perform an action within the current page. The timeout period is 20 minutes, and this cannot be adjusted. If the system times out, data that was on a page that had not yet been saved will be lost.

Important: The system currently does not autosave. When completing Modules 1 and 2, select the **Save and resume later button** frequently to ensure no information is lost.

System Access

Service System Managers (SSM) can add, update or deactivate the CA role for a user. Through the Service System Manager Registration Authority (SSMRA) new users are provided with access to CA.

For more information, see the [EOIS-CA-System Access Guide](#).

Service Provider User Roles and Permissions

The user roles and permissions in the CA system are:

- Common Assessment Edit
- Common Assessment View-Only

Each of the user roles has different permissions and system access, which is detailed below:

USER ROLE	Permissions
Common Assessment Edit	<ul style="list-style-type: none">• Create an assessment• Edit an assessment<ul style="list-style-type: none">• EO service provider created assessments and referred assessments only• Search for a client• View the summary page• View the history page• Assign/reassign a service delivery site• Assign/reassign a caseworker (referrals only)• Cancel an assessment<ul style="list-style-type: none">• EO service provider created assessments only• Return a referral

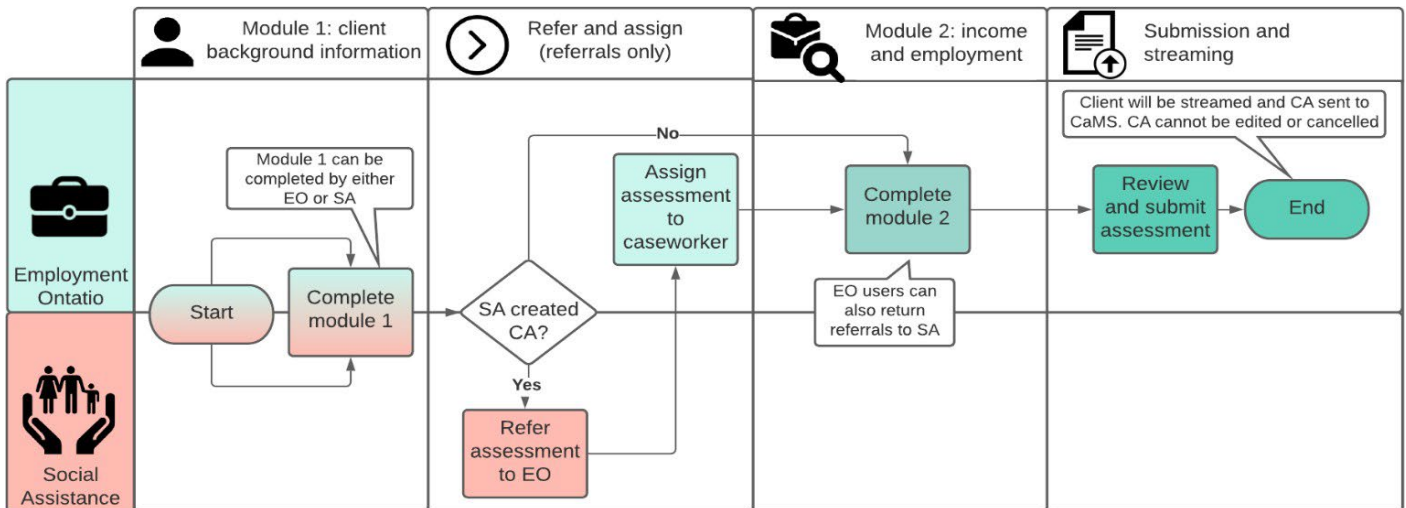
Common Assessment View-Only	<ul style="list-style-type: none"> • Search for a client • View the summary page • View the history page
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Acronyms

ACRONYM	Full Term
CA	Common Assessment
CaMS	Case Management System
EAP	Employment Action Plan
EO	Employment Ontario
MCCSS	Ministry of Children, Community and Social Services
MLITSD	Ministry of Labour, Immigration, Training and Skills Development
SA	Social Assistance
SAMS	Social Assistance Management System
SDS	Service Delivery Site
SLD	Service Level Determination
SP	Service Provider
SSM	Service System Manager

Assessment Lifecycle Diagram

This diagram provides a high-level overview of the lifecycle of an assessment, following a 'happy path', i.e., no returns to SA, cancellations, etc.



Assessment Statuses

There are different assessment statuses based on whether an SP or SA created the assessment.

SP Created Assessments

The following outlines all the statuses for SP created assessments:

STATUS	Description
In-progress	The assessment has been created but has not yet been submitted. Users with the CA Edit role can still edit the assessment.
Cancelled	The assessment has been cancelled. It is no longer editable and is now read-only.
Submitted	The assessment has been streamed and submitted. The CA data will now be available in CaMS.

SA Created Assessments

The following outlines all the statuses for SA created assessments:

STATUS	Description
In-progress	The assessment has been created but has not yet been referred to EO.
Referred – open	The assessment has been referred to EO, but an EO service provider has not yet been assigned to the assessment. Users with

	a CA Edit role must assign an SP caseworker to the assessment before it can be edited.
Referred – assigned	The assessment has been referred to EO and an SP caseworker has been assigned to the assessment. The assigned SP caseworker (with an edit role) can edit the assessment.
Referred – returned	The assigned SP caseworker has returned the assessment to SA. The SA caseworker will have been notified of the return via notification to SAMS.
Service pending	The assigned SP caseworker has set the service level determination (SLD) to 'Service pending'. The assessment can be edited; however, the SLD must be updated to 'Case-managed' before the assessment can be submitted. Note: SP created assessments can also have an SLD of 'Service pending', but this is not considered a status in the system.
Cancelled	The assessment has been cancelled.
Submitted	The assigned SP caseworker has submitted the assessment. The client has been streamed and the data from CA is available in CaMS.

CREATING AN ASSESSMENT

Only SP users with an edit role can create an EO assessment. Note: clients cannot have more than one active assessment. When creating a new assessment, you will be required to conduct a search to ensure that no duplicate records are created.


Instructions

1. Before creating an assessment, see if the client already has an assessment in the system, either:
 - a. Conduct a search for the client by entering the **Social insurance number**,

The screenshot shows the 'Common Assessment' search interface. At the top, there is an 'Ontario' logo and navigation links for 'Français', 'Search', and 'Logout'. Below the header, the title 'Common Assessment' is displayed. The main section is titled 'Search for a Client'. A message states: 'Please search by social insurance number if you wish to create a new assessment.' The form contains several input fields: 'First name', 'Last name', 'Birth date', 'Social insurance number' (highlighted with a red box), 'CaMS or SAMS number', 'CA number', 'Phone number', 'E-mail address', 'City', and 'Postal or zip code'. Below the fields are 'Search' and 'Reset' buttons, and a link for 'Referred clients'. At the bottom, a message asks: 'No record found. Would you like to create a new assessment?' with 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button.

OR,

- b. Conduct a search for the client. If a CaMS record is found, select the **Create** button from the search results table. Note: The **Create** button will only be displayed when the search result has an associated CaMS record and there is either no status (i.e., no assessment has ever been created for the client) or the status is **Submitted**.

Ontario  Français Search Logout

Search for a Client

Please search by social insurance number if you wish to create a new assessment.

First name Last name Birth date

Social insurance number CaMS or SAMS number CA number

Phone number E-mail address City Postal or zip code

Search
Reset
[Referred clients](#)

1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
									Create

- Next, the system will display the Intake page, where the client must consent to **the Notice of Collection and Consent**. Consent from the client must be received to proceed with the assessment. Select the acknowledgement checkbox, then the **Proceed to next step** button to continue.

Disclosure and collection of MCCSS information is in legal accordance with s.15 of the Ministry of Training, Colleges and Universities Act, s.71 of the Ontario Works Act, 1997 and s.53 of the Ontario Disability Support Program Act, 1997.

For more information contact the Employment Ontario Call Centre manager in writing at the Ministry of Labour, Training and Skills Development, 33 Bloor Street East, 2nd Floor, Toronto, Ontario M7A 2S3, by email at contactEO@ontario.ca, or by phone at 1-800-387-5656. For the hearing impaired, TTY is available at 1-866-533-6339.


Please check box to confirm that the client agrees with the above notice of collection and consent. Confirmation must be obtained to continue.

The client acknowledges and agrees to the terms and conditions of the Notice of Collection and Consent and certifies that the information that will be provided on this application is true and correct.

Proceed to next step

3. There are different steps based on how the assessment was created:
 - a. If the assessment was created by searching for the client via their Social Insurance Number (SIN) and no record exists, Module 1 will be displayed with only the SIN populated.
 - b. If the assessment was created via the **Create** button (in the search results table), Module 1 will be displayed with some information auto-populated from the CaMS record.

Note: If the system conducts a search and finds the client has an incomplete, active assessment, it will show in the table as “In progress” for the user to update and/or continue completing. To continue with the active assessment, select the **Edit** button.

Ontario  Français Search Logout

Common Assessment

Search for a Client

Please search by social insurance number if you wish to create a new assessment.

First name Last name Birth date

Social insurance number CaMS or SAMS number CA number

Phone number E-mail address City Postal or zip code

[Referred clients](#)

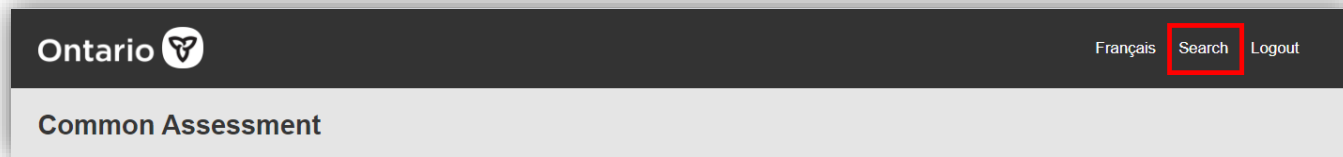
1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
					In progress				<input type="button" value="Edit"/>

4. Continue completing Module 1 or save the assessment and resume it later. See [Editing an assessment > Module 1](#) for more information.

SEARCH PAGE

The Search page is the home page for CA. The Search page can be accessed via selecting the **Search** link, located on the top-right of the screen.




On the Search page, users can access the following functions:

- [Searching for a client](#)
- [Creating an assessment](#)
- [Viewing the referred clients list](#)

Searching for a client

Instructions

1. To search for a client, navigate to the **Search** page. You can search for a client using one or more of the following criteria:
 - **First name**
 - **Last name**
 - **Birth date**
 - **Social Insurance Number**
 - **CaMS or SAMS number**
 - **CA number**
 - **Phone number**
 - **Email address**
 - **City**
 - **Postal or zip code**

Ontario  Français Search Logout

Common Assessment

Search for a Client

Please search by social insurance number if you wish to create a new assessment.


First name Last name Birth date

Social insurance number CaMS or SAMS number CA number

Phone number E-mail address City Postal or zip code

[Search](#) [Reset](#) [Referred clients](#)

- After entering your criteria, select the **Search** button. You can also select the **Reset** button to clear the search fields.

Ontario  Français Search Logout

Common Assessment

Search for a Client

Please search by social insurance number if you wish to create a new assessment.

First name Last name Birth date

Social insurance number CaMS or SAMS number CA number

Phone number E-mail address City Postal or zip code

[Search](#) [Reset](#) [Referred clients](#)

- If a record(s) was found, it will appear at the bottom of the page in the search results table. Important: Selecting the **CA #** hyperlink in the search results table will navigate to a **read-only**

version of the **Summary** page. If you navigate to the **Summary** page this way, you will **not** be able to edit or submit the assessment. You must select the **Edit** button in the [Action column](#) to proceed with updating/submitting the assessment.

2 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
Tom	Thumb	23-JUL-1990	CA1061222		In progress				Edit
Tom	Thumb	25-JUL-1990	CA1061220		Cancelled				

Action buttons in the search results table

Depending on the type and status of the record, the following action buttons may be available in the **Action** column of the search results table:

- **Create**
- **Edit**
- **Assign**
- **Reassign**
- **No button** (i.e., the column is blank)

1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
test	man	03-JUN-1997	CA1007358		In progress				Edit

The user’s permission to making changes to the record is based on whether the record was created by an SP or SA user and/or by the record’s status. See the tables below for more information on what action buttons will appear for a record based on type ([SP](#) or [SA created](#)) and status.

Important: The tables outline the permissions for a user with a CA Edit role.

SP created assessments

Status	No button	Create button	Edit button
No status	No	Yes	No

In-progress	No	No	Yes
Cancelled	Yes	No	No
Submitted	Yes*	Yes**	No

*For records that do not have an associated CaMS record

**For records with an associated CaMS record

Status	No button	Create button	Edit button	Assign button	Reassign button
No status	No	No	No	No	No
In-progress	Yes	No	No	No	No
Referred - Open	No	No	No	Yes	No
Referred - Assigned	No	No	Yes*	Yes**	Yes***
Referred – Returned	Yes	No	No	No	No
Cancelled	Yes	No	No	No	No
Submitted	No	Yes	No	No	No

*If the assessment is assigned to the logged in user

**If the assessment is not assigned to a caseworker

***If the assessment is assigned, but not assigned to the logged in user

Referred clients list


When SA has referred an assessment to EO, it will appear in the **Referred clients** list on the **Search** page. The **Referred clients** list displays all non-submitted (i.e., referred > open and referred > assigned) referrals within the logged-in SP user's catchment area.

Instructions

1. To access the referred clients list, select the **Referred clients** link on the Search page.

Search for a Client

Please search by social insurance number if you wish to create a new assessment.

First name Last name Birth date 

Social insurance number CaMS or SAMS number CA number

Phone number E-mail address City Postal or zip code

2. The list will be displayed and contains the following features/functions:


a. Filtering:



- Ability to filter by service delivery site, referral status, and/or SP caseworker. Select the **Apply filter** button to filter the results based on the criteria selected or the **Reset filter** button to clear the filter criteria.

Referred clients

Filter by:

Service delivery site:

Referral status: Caseworker: 

b. Sorting:

- The following columns can be sorted (ascending and descending): **First name**, **Last name**, **Birth date**, **CA #**, **Date referred**, and **CaMS or SAMS #**.

To sort, hover over the column header – an up arrow will appear to sort by ascending order and a down arrow will display to sort by descending order.

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
		30-MAY-2000	CA1003774	05-JAN-2021	Referred	Assigned	IAAP112915 IAAP112915	200582039	Edit Reassign
C2447A59B3	4EF781B1CB		CA1003935	05-JAN-2021	Referred	Assigned	3B55C1213D B5094B03A0	215446972	Reassign

The list will display 50 records per page. Select the page numbers or **First**, **Previous**, **Next** or **Last** buttons to scroll through the results.



Assigning/reassigning a referral

Assessments with a status of Referred > Open must be assigned to an SP caseworker before any updates can be made to the assessment. Once an assessment has been assigned, it can also be reassigned to a different caseworker if the assessment has not been submitted or returned to SA. Only users with the Common Assessment Edit role can assign and reassign referrals.

Instructions

1. There are a few different ways to locate a referral for assignment/reassignment:
 - a. Conduct a search for the referral using the [Search for a client section](#).
 - i. Select the **Assign** or **Reassign** button in the Action column; or
 - ii. Select the CA # hyperlink to open the **Summary** page where you will be able to assign/reassign the assessment.
 - b. Navigate to the [Referred clients](#) list to find the referral.
 - i. Once you have located the referral and you would like to assign/reassign, select the **Assign** or **Reassign** button. Note: The **Reassign** button will appear

for assessments that are Referred > Assigned and the **Assign** button will display for assessments that are Referred > Open.

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
C54E140A2D	0D889E28A5		CA1004020	05-JAN-2021	Referred	Open		303276923	Assign

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
		30-MAY-2000	CA1003774	05-JAN-2021	Referred	Assigned	IAAP112915 IAAP112915	200582039	Edit Reassign

- On the Summary page, scroll to the **Employment Ontario Caseworker Information** section. Optional: If you need to change the service delivery site, select a new service delivery site from the **Service delivery site (SDS)** dropdown menu. Select a caseworker from the **Caseworker** dropdown menu. Once the SDS and caseworker have been selected, select the **Assign assessment** button to save your changes.

Employment Ontario Caseworker Information

Service system manager
FEDCAP CANADA

Service delivery site (Required)

Caseworker (Optional)

Phone number E-mail address

Date assigned

Assign assessment ←

- The caseworker information section will now display the assigned SP user's name and contact information, as well as the assignment date.

Employment Ontario Caseworker Information

Service system manager
FEDCAP CANADA

Service delivery site (Required)

YMCA of Niagara - YMCA Niagara Falls

Caseworker (Optional)

IAAP112915 IAAP112915

Phone number

E-mail address

Fedcap.org

Date assigned

25-MAR-2021

Assign assessment

4. A confirmation message will appear at the top of the page. If the assessment has been assigned/reassigned to the logged-in SP user, they will have the option to continue editing the assessment. Select **Yes** to open the assessment for editing or **No** to return to the Search page.

The assessment CA1004020 was assigned successfully.

The assessment is now assigned to you. Would you like to proceed with completing the assessment?

Yes


No

EDITING AN ASSESSMENT

Editing an assessment is only available to SP users with an [edit role](#). The ability to edit an assessment has restrictions and conditions. Please see the [Action buttons in the search results table](#) for details on when an assessment can be edited by SP users.

Instructions

1. There are a few ways to navigate to an assessment to begin editing it.
 - a. For both SP created assessments and SA referred assessments, you can [conduct a search](#) for the client on the **Search** page.
 - i. Select the **Edit** button in the **Action** column of the search results table to begin editing the assessment.

Ontario  Français Search Logout

Common Assessment

Search for a Client

Please search by social insurance number if you wish to create a new assessment.

First name	Last name	Birth date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Social insurance number	CaMS or SAMS number	CA number	
<input type="text"/>	<input type="text"/>	CA1061261	
Phone number	E-mail address	City	Postal or zip code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Search](#) [Reset](#) [Referred clients](#)

1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
Patty	Cake	19-SEP-1990	CA1061261		In progress				Edit

- b. For referred assessments, you can select the **Referred clients** link to locate the assessment.
 - i. Select the **Edit** button to begin editing the assessment. Note: for more information on when you can edit a referred assessment, see [SA created records](#)

The screenshot shows a web interface for managing referred clients. At the top, there are buttons for 'Search' and 'Reset', and a link for 'Referred clients' which is highlighted with a red arrow. Below this is a section titled 'Referred clients' with a 'Filter by:' label. The filters include a dropdown for 'Service delivery site' (set to '-- Select --'), a dropdown for 'Referral status' (set to 'Assigned'), and a text input for 'Caseworker' (set to 'IAAP112915 IAAP112915'). There are 'Apply filter' and 'Reset filter' buttons. Below the filters, it says '1-2 of 2 results'. A pagination bar shows 'First', 'Previous', '1', 'Next', and 'Last'. The main content is a table with the following columns: First name, Last name, Birth date, CA #, Date referred, CA status, Referral status, Caseworker, CaMS or SAMS #, and Action. Two rows of data are visible, each with a red arrow pointing to an 'Edit' button in the Action column.

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
ADF317BD9C	5FB5E311EF		CA1003774	05-JAN-2021	Referred	Assigned	IAAP112915 IAAP112915	200582039	Edit Reassign
			CA1004068	05-JAN-2021	Referred	Assigned	IAAP112915 IAAP112915	200499192	Edit Reassign

At the bottom, there is another pagination bar with 'First', 'Previous', '1', 'Next', and 'Last'.

Module 1

Module 1 of the assessment focuses on the client's background information and contains the following sections:

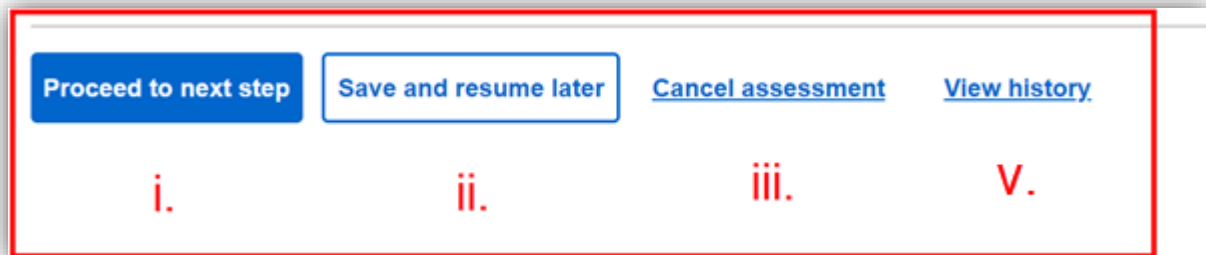
- **Basic Information**
- **Mailing Address and Contact Information**

- **Demographic Information**
- **Skills**
- **Supports and Service Needs**
- **Service Level Determination**

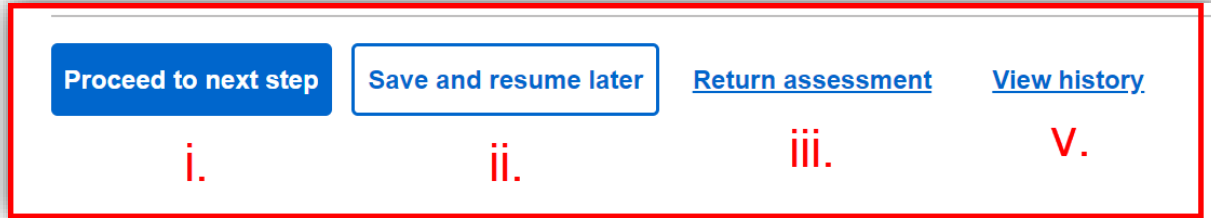
Module 1 can be completed by either SP or SA users; however, only SP users complete the [Service Level Determination](#) question.

Instructions

1. On Module 1, (if applicable) continue completing the questionnaire and/or updating responses.
 - a. The service level determination (SLD) appears near the bottom of the page. If applicable, [enter/update the SLD](#).
 - b. At the bottom of the page, you have a few options. You can:
 - i. Select the **Proceed to next step** button to navigate to [Module 2](#). Note: all questions must be answered before proceeding to Module 2.
 - ii. Select the **Save and resume later** button to save the assessment.
 - iii. If it is an SP created assessment, select the **Cancel assessment** button to [cancel the assessment](#).
 - iv. If it is an SA created assessment, select the **Return assessment** button to [return the referral to SA](#).
 - v. Select the **View history** button to navigate the [history page](#).



Bottom of page – SP created Assessment



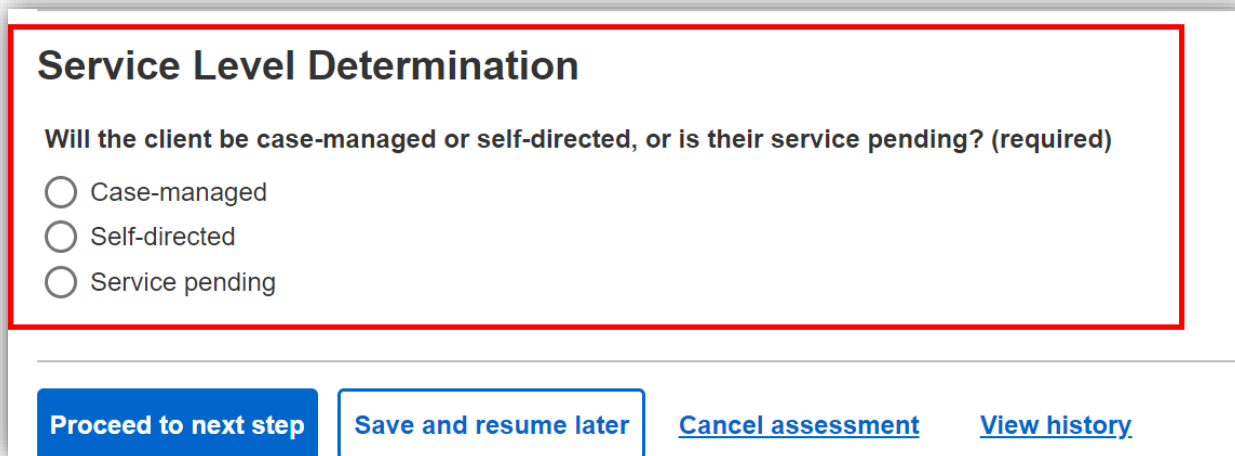
Bottom of page – SA created assessment

Service Level Determination

The service level determination section appears near the bottom of the page on Module 1 for both SP created and SA created assessments. There are three options for service level determination:

- **Case-managed**
- **Self-directed**
- **Service pending**
 - If **Service pending** is selected, it will block the submission of an assessment. The user must change the response to case-managed before submitting the assessment.

The response can be updated at any time before assessment submission.



Module 2

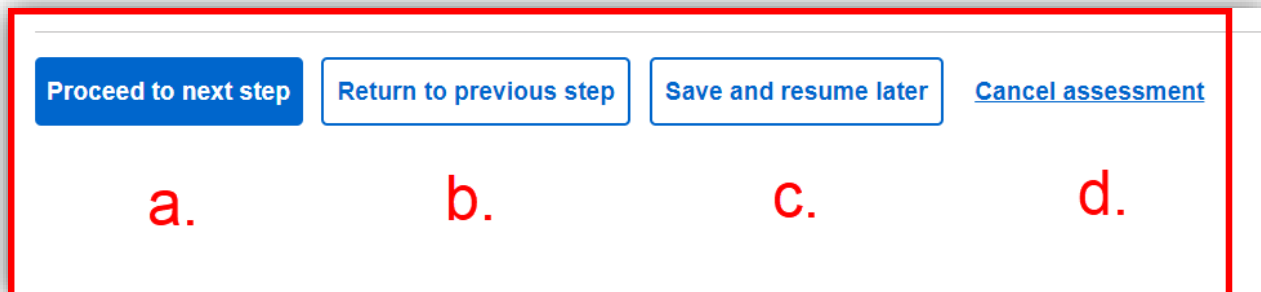
Module 2 of the assessment focuses on income and employment and contains the following sections:

- **Income and Assistance**
- **Disability Information**
- **Employment Status and History**
- **Employment Goals**

Only SP users can complete Module 2.

Instructions

1. On Module 2, SP users continue completing the questionnaire and/or updating responses.
2. At the bottom of the page, you have a few options. You can:
 - a. Select the **Proceed to next step** button to navigate to the [Summary page](#). Note: all questions must be completed before proceeding to the Summary page.
 - b. Select the **Return to previous step** button to go back to [Module 1](#). Note: all information entered in Module 2 will be saved after selecting this button.
 - c. Select the **Save and resume later** button to save the assessment.
 - d. If it is an SP created assessment, select the **Cancel assessment** button to [cancel the assessment](#).
 - e. If it is an SA created assessment, select the **Return assessment** button to [return the assessment](#) to SA.



Module 2 – bottom of page – SP created assessment

Proceed to next step	Return to previous step	Save and resume later	Return assessment
a.	b.	c.	e.

Module 2 – bottom of page – SA created assessment

RETURNING A REFERRAL

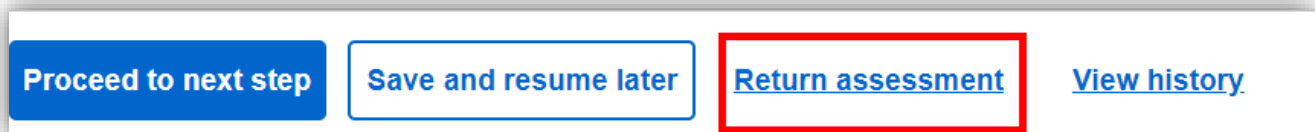
Only SA created assessments (i.e., referrals) with a status of **Referred > Assigned** can be returned to SA. When the assessment is returned to SA, the SA caseworker will be alerted to the return via an automated notification in SAMS.

If a referral has a status of **Referred > Open** and a return is required, [assign it to an SP caseworker](#), then proceed with returning the referral to SA.

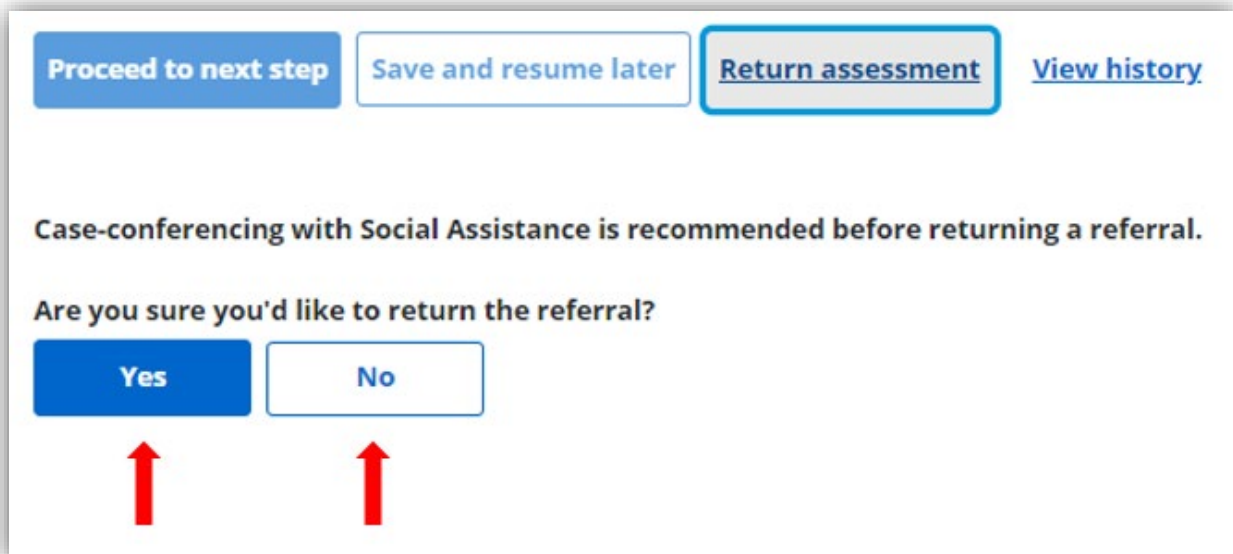
Only users with a CA Edit role can return a referral. To return a referral, the assessment must be assigned to the logged in SP user.

Instructions

1. To return a referral to SA, select the **Return assessment** button on the bottom of the page on either [Module 1](#) or [Module 2](#).



2. A confirmation pop-up will appear. Select **Yes** to proceed with returning the assessment. Select **No** to discard the request.



3. If you selected **Yes**, you will be required to provide further information about the return. Select and complete the return information as required.

Are you sure you'd like to return the referral?

Who is mainly informing this return? (required)

Client
 Employment Ontario (EO)
 Social Assistance (SA)

Please select a reason for returning the referral (required)

Client cannot meaningfully participate due to health or mental health/addictions crisis
 Client cannot meaningfully participate due to housing/homelessness crisis
 Client declined service
 Client is already registered for EO services
 Client is not eligible for EO services
 Client was referred in error
 Unable to connect with client
 Other (Please specify)

Comment (optional)

4. Select **Confirm** to return the referral to SA or select **No** to discard the return request.

Are you sure you'd like to return the referral?

←

Who is mainly informing this return? (required)

Client

Employment Ontario (EO)

Social Assistance (SA)

Please select a reason for returning the referral (required)

Client cannot meaningfully participate due to health or mental health/addictions crisis

Client cannot meaningfully participate due to housing/homelessness crisis

Client declined service

Client is already registered for EO services

Client is not eligible for EO services

Client was referred in error

Unable to connect with client

Other (Please specify)

Comment (optional)

←

5. Upon selecting **Confirm**, the assessment will be returned to SA. You will be navigated to the assessment's **Summary** page, where a confirmation will be displayed at the top of the screen. The status will be updated to **Referred > Returned**, with the **Reason for Return** appearing in both the **Summary** page and **History** page.

Common Assessment

Assessment returned successfully. ←

Summary

Notes

Please add notes as needed. (optional)

Save note

Common assessment number

CA1099552

Common assessment status

Referred

Referral status (for referrals only)

Returned

Reason for return

Social Assistance (SA)

Client was referred in error

Service level determination

Return information on the Summary page

History

Event type	Date	Time	First name	Last name	Location
Returned	17-FEB-2023	11:01:36	[REDACTED] 2 Fn	[REDACTED].02	
Please select a reason for returning the referral					
Previous Answer			Answer Client was referred in error		
Who is mainly informing this return?					
Previous Answer			Answer Social Assistance (SA)		

Return information on the History page

- The assessment will now be read-only for all SP users. Only SA users with the edit role can update the assessment.
- A search of the client's assessment now displays the "Referral status" as "Returned".

1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
John1115167	F77D722030A8FC608A129371F90DCD6D		CA1017129	09-FEB-2021	Referred	Returned	IAAP113902 Fn IAAP113902	214318164	Request cancel

CANCELLING AN ASSESSMENT

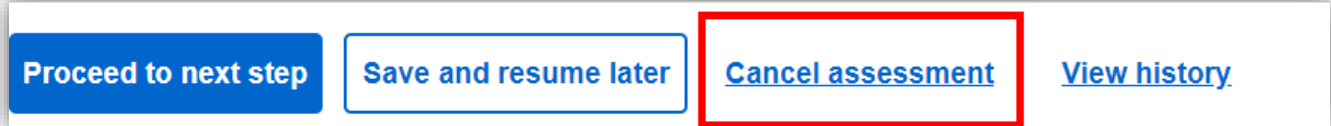
SP Assessments

Cancelling an assessment is only available for assessments that have not yet been submitted (i.e., have a status of **In-progress**). SP users can cancel any assessment created by an SP user.

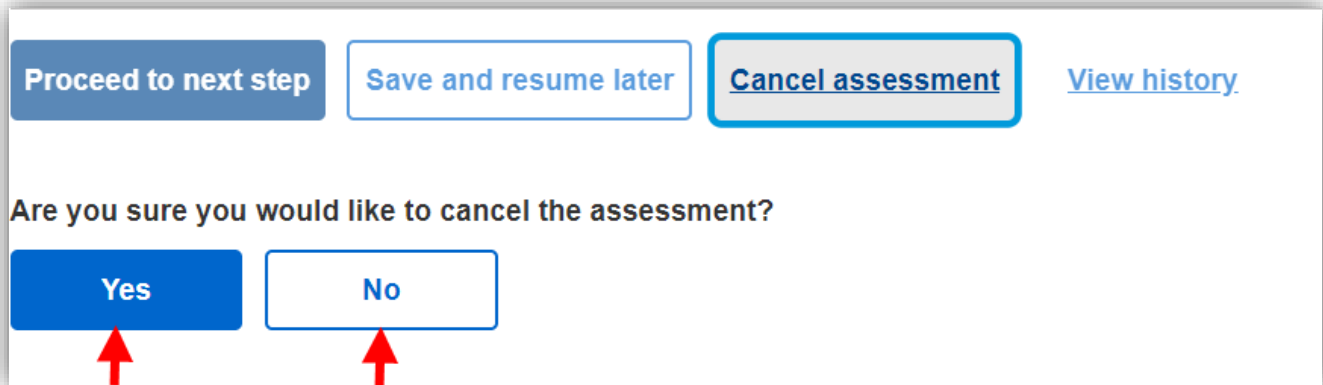
Only users with an edit role can cancel an assessment.

Instructions

1. To cancel an SP created assessment, select the **Cancel assessment** button located on Module 1 or Module 2.



2. A confirmation message will be displayed. Select **Yes** to continue with the cancellation or select **No** to discard the request.



3. If **Yes** was selected, select the reason for the cancellation. Optional: enter additional information in the **Comment** text box.

Are you sure you would like to cancel the assessment?

Yes

No

Please select a reason for cancelling the assessment. (required)

- Client decided not to proceed with completing the assessment
- Unable to connect with client
- Social assistance file closed
- Created in error
- Other (Please specify)

Comment (optional)

Confirm


4. Select **Confirm** to submit the cancellation.

Are you sure you would like to cancel the assessment?

Please select a reason for cancelling the assessment. (required)

Client decided not to proceed with completing the assessment
 Unable to connect with client
 Social assistance file closed
 Created in error
 Other (Please specify)

Comment (optional)



5. You will be navigated to the Summary page, where a confirmation message will be displayed at the top of the screen. The **Common assessment status** will be updated to **Cancelled** and the cancellation information will appear in the **Reason for cancellation** field. The assessment will now be read-only.

Common Assessment

Assessment cancelled successfully. [Return to the search page.](#)

Summary

Notes

Please add notes as needed. (optional)

Save note

Common assessment number
CA1130297

Common assessment status
Cancelled

Referral status (for referrals only)

Reason for cancellation
Client decided not to proceed with completing the assessment

SA Assessments

SP users are able to cancel an SA assessment (if status is “In progress” or “Returned”) for clients that have left the Social Assistance program and have come to EO for assistance. The cancellation feature includes a cancel button for SP users to select, triggering a request to the MCCSS SAMS system to verify if the SA client's case is closed. If closed, the CA system will cancel the SA assessment and the SP user can proceed with creating a new assessment.

Instructions

1. If a search result for a client displays an assessment with an **In progress**, or **Returned** CA status, and a **Request cancel** button located at the end of the table, select the button.

Phone number E-mail address City Postal or zip code

[Referred clients](#)

1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
Test	Case		CA1234123		In progress			11223341	<input type="button" value="Request cancel"/>

- An alert displays that the client is no longer active in the Social Assistance Management System (SAMS). The question to cancel the assessment provides a choice of **Yes** or **No**. Select the **Yes** button.

Client is no longer active in SAMS. Would you like to cancel the assessment?

1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
Test	Case		CA1234123		In progress			11223341	<input type="button" value="Request cancel"/>

- Another alert displays that the assessment has been cancelled successfully and asks if you would like to create a new assessment. Select the **Yes** button to begin a new SP assessment for the client.

The assessment has been successfully cancelled. Would you like to create a new assessment?

1 record(s) found. Please select a record from the search results:

First name	Last name	Birth date	CA #	Date referred	CA status	Referral status	Caseworker	CaMS or SAMS #	Action
Test	Case		CA1234123		In progress			11223341	<input type="button" value="Request cancel"/>

SUMMARY PAGE

The Summary page displays all current responses to the questionnaire. In addition, it contains the following sections:

- **Summary**
- **Employment Ontario Caseworker Information**
- **Social Assistance Caseworker Information (for referrals only)**

All SP users can access the Summary page; however, users with a CA Edit role can also [assign/reassign the assessment to an SDS](#) and (for referrals only) a [caseworker on this page](#). If the Summary page was accessed via the Edit button, users with a CA Edit role will also be able to [submit the assessment](#) on this page.

Summary

This section is highlighted in a grey box and contains the following information:

- **Common assessment number**
- [Common assessment status](#)
- **Referral status (for referrals only)**
- [Service level determination](#)
- **Catchment area**
- **Common assessment stream**
 - Information will only be displayed if the assessment has been submitted.

Summary

Notes

Please add notes as needed. (optional)

Save note

Common assessment number

CA1003774

Common assessment status

Referred

Referral status (for referrals only)

Assigned

Service level determination

Case-managed

Catchment area

Hamilton--Niagara Peninsula

Common assessment stream

Employment Ontario Caseworker Information

The information in the **Employment Ontario Caseworker Information** section differs based on whether the assessment was created by an SP or SA user (i.e., it is a referral).

SP created assessments

SP created assessments contain the following information in the Employment Ontario Caseworker Information section:

- **Service system manager**
- **Service delivery site**

Assigning a service delivery site

If an SDS has not yet been assigned, the **Service system manager** and **Service delivery site** fields will be blank. An SDS must be assigned to submit an assessment. An SDS can also be reassigned at any time up until submission.

Employment Ontario Caseworker Information

Service system manager

Service delivery site

Assign assessment

Instructions

1. To assign an assessment, select an SDS from the dropdown menu and select the **Assign assessment** button. Note: only SDS's from the logged-in user's catchment area will appear in the dropdown menu.

Employment Ontario Caseworker Information

Service system manager

Service delivery site

Community Living Hamilton

Assign assessment

2. The **Service system manager** field will now display the SSM.


Employment Ontario Caseworker Information

Service system manager
FEDCAP CANADA

Service delivery site
Community Living Hamilton

Assign assessment

3. A confirmation message will appear at the top of the screen confirming the assignment.

Ontario 

Common Assessment

The assessment CA1007400 was assigned successfully.

Summary

SA created assessments

SA created assessments contain the following information in the **Employment Ontario Caseworker Information** section:

- **Service system manager**
- **Service delivery site**
- **Caseworker**
 - Phone number
 - E-mail address
- **Date assigned**

If the referral has not yet been assigned, the caseworker information and date assigned fields will be blank. However, the **Service delivery site** field will have a value populated based on what the SA caseworker selected during the referral process.

Employment Ontario Caseworker Information

Service system manager
FEDCAP CANADA

Service delivery site (Required)
YMCA of Niagara - YMCA Niagara Falls

Caseworker (Optional)

Phone number E-mail address

Date assigned

Assign assessment

For more information on assigning or reassigning referrals, see the [Assigning/reassigning a referral](#) section.

Social Assistance Caseworker Information (for referrals only)

The Social Assistance Caseworker Information (for referrals only) section contains the following fields:

- **Location**
- **Caseworker**
 - Phone number
 - E-mail address
- **Date referred**

The fields will only display values once an assessment has been referred. If an assessment has not yet been referred to EO, the fields will be blank. Once an assessment has been referred to EO, the information will automatically be displayed in the fields.

Social Assistance Caseworker Information (for referrals only)

Location Niagara CMSM - 014002 - Niagara Falls Office	
Caseworker 43AED51572 0F24B4817E	
Phone number A{4▲▲▲	E-mail address niagararegion.ca
Date referred 05-JAN-2021	

Action buttons on the Summary page

There are a few action buttons that are available to users at the bottom of the Summary page:

- a. Select the **Submit assessment** button to [submit the assessment](#).
- b. Select the **Return to previous step** button to go back to [Module 2](#).
- c. Select the **Return to search** button to navigate to the [Search](#) page.
- d. Select the **View history** button to navigate to the [History](#) page.

Submit assessment	Return to previous step	Return to search	View history
a.	b.	c.	d.

Submitting an assessment

Before an assessment is submitted the following steps/information must be complete:

- All questions in Modules 1 and 2
- A service delivery site has been [assigned](#)

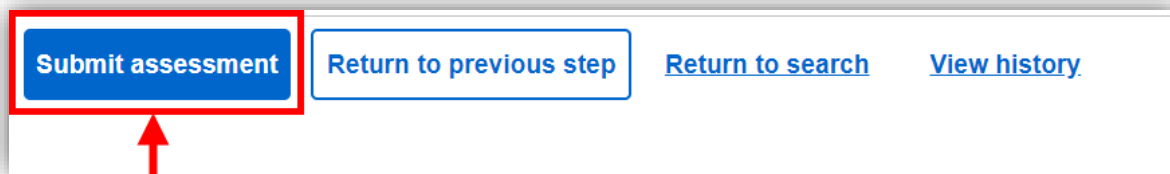
- A caseworker has been [assigned](#) (for referrals only)

In addition, the user must navigate to the **Summary** page through the [Edit](#) button; i.e., if the user navigates to the **Summary** page via the **CA #** hyperlink, they will be unable to submit the assessment, i.e., the **Submit assessment** button will be disabled.

Only users with a Common Assessment Edit role can submit assessments.

Instructions

1. To submit an assessment, navigate to the **Summary** page. On the **Summary** page, select the **Submit assessment** button.



2. Once you select the **Submit assessment** button, the button will become disabled and a loading screen may appear. When the submission has completed, you will be navigated back to the **Summary** page and a confirmation message will appear at the top of the screen. The **Common Assessment status** will also be updated to **Submitted** and a **Common Assessment stream** will also be generated.

Assessment number CA1007400 submitted successfully.

Summary

Notes

Please add notes as needed. (optional)

Save note

Common assessment number

CA1007400

Common assessment status

Submitted

Referral status (for referrals only)

Service level determination

Case-managed

Catchment area

Hamilton--Niagara Peninsula

Common assessment stream

Stream C - Employability focused

Stream C includes clients who may need to focus primarily on improving employability, prior to exploring employment opportunities. Clients who fall into this Stream may require intensive and on-going supports to enter the labour market.

Note: Once an assessment has been submitted, the information will be transferred to CaMS where the SP user can continue with creating an [Employment Action Plan](#). The assessment will also now be read-only in CA, i.e., no changes can be made and the assessment cannot be returned to SA or cancelled.

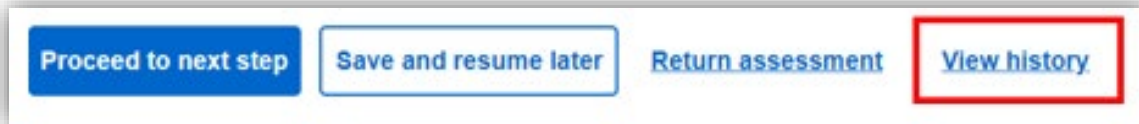
HISTORY PAGE

The History page can be accessed at any stage in an assessment's lifecycle (from in-progress to submitted). It is available to both SP and SA users; however, SA users will only be able to view this page for SA created assessments.

The History page contains a record of all assessment milestones and changes, such as assessment creation, referral, assignment/reassignment, service level determination, questionnaire version changes, edits, cancellation, and submission.

Instructions

1. To view the history page, navigate to the relevant assessment, then select the **View history** button located at the bottom of the page on either Module 1 or 2 or the Summary page.



2. Each entry in the History page contains the following information: **Event type**, **Date**, **Time**, **caseworker name (First name and Last name)**, and **Location**.

Event type	Date	Time	First name	Last name	Location
Edited	29-MAR-2021	10:35:51	IAAP112915	IAAP112915	
Edited	29-MAR-2021	10:30:42	IAAP112915	IAAP112915	
Edited	29-MAR-2021	10:20:58	IAAP112915	IAAP112915	
Edited	29-JAN-2021	16:21:10	IAAP112915	IAAP112915	
Service	29-JAN-2021	16:20:03	IAAP112915	IAAP112915	
Edited	29-JAN-2021	16:20:03	IAAP112915	IAAP112915	

3. Many of the entry types are also expandable. Select the expand icon to see more details about the entry, such as **question IDs**, **Main question**, **Sub-question**, **Previous answer**, and **Answer**. Select the collapse icon to hide the details.

Service	29-JAN-2021	16:20:03	IAAP112915	IAAP112915
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Main Question ID	Main Question	Question ID	Sub-question	Previous Answer	Answer
SLD01	Will the client be case-managed or self-directed, or is their service pending?	SLD01	Will the client be case-managed or self-directed, or is their service pending?	Self-directed	Service pending

4. When you are finished reviewing the **History** page, select the **Return to assessment** button to go back to the assessment.

<div style="display: flex; align-items: center;"> ▼ Edited </div>	29-JAN-2021	16:16:02	61409AA1FD	2865F0AEF7	SA Hamilton Niagara Region - 000351 - Brantford Office
Created	29-JAN-2021	16:15:58	61409AA1FD	2865F0AEF7	SA Hamilton Niagara Region - 000351 - Brantford Office

Return to assessment