Job Aid: Common Assessment

Completing and Submitting a Common Assessment: Referred from **SOCIAL ASSISTANCE**

Common Assessment Sections	Step-by-Step Instructions
Search for a Common Assessment (CA)	1. Log into the Common Assessment Tool 2. Navigate to the "**REFERRED CLIENTS**" hyperlink to find a referral *Note: All Common Assessment (CA) referrals that have been assigned to your organization can be found on this list.* 3. Search results will display information for each assessment under the following columns: **First and Last name, Birth date, CA number, Date referred, Referral Status and a CaMs or SAMs number**. 4. Use the fields to customize your search to show the assessments that have been assigned to you (eg. Service Delivery Site, Caseworker etc.) 5. Click "**APPLY FILTER**" 6. Locate the CA you would like to complete and click the "**EDIT**" button
Notes	*Note: Caseworker notes can now be accessed from the Summary page of the Common Assessment Module 1. The Notes Text Box can be edited and viewed by both SA and EO caseworkers and supports a two-way communication between caseworkers. This allows an avenue for caseworkers (SA and EO) to provide additional information such as: client's preferred method of contact, client's choice of preferred Service Provider; other helpful information etc.* 1. On the Summary page of Module 1, add a note to include the EO caseworkers contact information (name, number, ext., email etc.) Refer to Job Aid: Case Note Guide for the template. Click "**SAVE**"
M1 (Module 1)	*Note: If there have been any changes in the client's circumstance since Module 1 was completed by SA caseworker, you can make any changes/updates to Module at this time.*

	1. On <u>Client Background Information</u> page briefly review the following sections of Module 1 (M1) with client. Make any edits if necessary:
	    o Basic Information
	    o Mail Address & Contact details
	    o Demographics
	    o Education
	    o Skills Supports
	    o Support Needs
	    o Service Level Determination (SLD)
	       Note: For SLD, all Social Assistance clients will be case managed
	2. Click "**PROCEED TO NEXT STEP**"

M2 (Module 2)	1. On the <u>Income and Employment</u> page complete the following sections of Module 2:
	    o Income and Employment
	    o Disability Information
	    o Employment Status and History
	    o Employment Goals
	2. Click "**Next to Proceed**" to conclude Module 2

Reassign CA (If applicable)	*Note: For self-referred clients that would like to register with another service provider, the Employment Caseworker will assign the CA to SSM* **If the CA needs to be reassigned to another Caseworker:** 1. On the <u>Summary Page</u> under Employment Ontario Caseworker Information, use the drop down fields to select a Case Worker within your organization 2. Click "**ASSIGN ASSESSMENT**" 3. A message will load at the top of the page showing that the CA has been successfully assigned
Submit Application	*Note: Once a CA is submitted, you can no longer make any changes to that CA; if you try to access a CA once it has been submitted it will be in a read-only copy.* *1.* On <u>Summary Page</u> you can add a note in the note box 2. Review <u>Summary Page</u> to ensure information is correct before submitting. 3. Scroll to bottom of page then click "**SUBMIT ASSESSMENT**" 4. A message will load at the top of the page showing the CA has been successfully submitted

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	5. Once the assessment is submitted, the client's stream will be determined and an EAP can now be created in CaMS
Returned Referrals- Common Assessment	*Note: If it is deemed a referral was inappropriate or is incomplete and 120 days have lapsed, Service Providers can return the CA to the SSM* 1. On the <u>Summary Page</u>, add to the notes box any details regarding the reasoning for the returned referral or client's preferred choice of service provider 2. Under the <u>Employment Ontario Caseworker Information</u> Section click the drop down arrow from the Service Delivery Site field and select the "**SSM**" 3. Click "**ASSIGN ASSESSMENT**"