Job Aid: Common Assessment

Completing and Submitting a Common Assessment: **SELF-REFERRED**-Direct to EO Provider

Common Assessment Sections	Step-by-Step Instructions
Create New Common Assessment (CA)	*Note: Best practices recommended to prevent creating duplicate Common assessment (CA): Complete a Search in the Common Assessment Tool using SIN number. Complete a secondary search with Name and D.O.B. in case a CA was started however the SIN was not saved in the CA.* 1. Log into the Common Assessment (CAT) 2. Search client by **SIN, Name, D.O.B.** to ensure client does not already exist in the system. 3. If client does not come up in the search, you will be prompted to create assessment, click "yes"
NOCC (Notice of Collection and Consent)	*Note: This step must be completed prior to 'Common Assessment' being completed.* 1. Review **Notice to Collect and Consent** with client in detail as per guidelines 2. Once the **NOCC** consent has been reviewed and accepted by client, check the box at bottom of consent and click "**PROCEED TO NEXT STEP**"

M1 (Module 1)	1. On <u>Client Background Information</u> page complete the following sections of Module 1 with client:
	   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 Income and Employment page, complete the following sections of Module 2 with client:

	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: If a CA needs to be assigned to a new caseworker. For self-referred clients that would like to register with another service provider, the Employment Caseworker will assign the CA to SSM.* 1. On the <u>Summary Page</u> under Employment Ontario Caseworker Information use the drop down fields to select a Service Delivery Site and Employment Ontario Case Worker. 2. Select the caseworker who will be managing the case moving forward. 3. Click "**ASSIGN ASSESSMENT**"
Submit Application	*1.* On <u>Summary Page</u> you can add a note in the note box. 2. Review Summary Page to ensure information is correct before submitting 3. Scroll to the bottom of the page and click "**Submit Assessment**" 4. Once the assessment is submitted, message will load at the top of the page showing the CA has been successfully submitted
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**" 4. Contact the SSM's Intake Team to notify of the returned-referral