



Job Aid: Common Assessment

Completing and Submitting a Common Assessment: Referred Direct to **SSM**

Common Assessment Sections	Step-by-Step Instructions
<p align="center">Create New Common Assessment (CA)</p>	<p><i>Note: The SSM will gather basic information from the client for the referral (eg. Name, D.O.B., address, etc.) then forward the referral to the Service Provider. The Service Provider will use this information to begin a Common Assessment.</i></p> <ol style="list-style-type: none"> 1. Log into the Common Assessment tool (CAT) 2. Search client by SIN, Name, D.O.B. to ensure client does not already exist in the system, or have an active EAP 3. If client does not come up in the search, you will be prompted to create assessment, click “Yes”
<p align="center">NOCC (Notice of Collection and Consent)</p>	<p><i>Note: This step must be completed prior to Common Assessment being completed.</i></p> <ol style="list-style-type: none"> 1. Read and review Notice to Collect and Consent in great detail with client 2. Once NOCC consent has been read and accepted by client, check the box at bottom of consent 3. Click “PROCEED TO NEXT STEP”
<p align="center">M1 (Module 1)</p>	<ol style="list-style-type: none"> 1. On <u>Client Background Information</u> page complete the following sections of Module 1 with the client: <ul style="list-style-type: none"> ○ Basic Information ○ Mail Address & Contact details ○ Demographics ○ Education ○ Skills Supports ○ Support Needs ○ Service level Determination 2. Click “PROCEED TO NEXT STEP”
<p align="center">M2 (Module 2)</p>	<ol style="list-style-type: none"> 1. On the <u>Income and Employment</u> page complete the sections of Module 2 with the client:



	<ul style="list-style-type: none"> ○ Income and Assistance ○ Disability Information ○ Employment Status and History ○ Employment Goals <ol style="list-style-type: none"> 2. Click “NEXT TO PROCEED” to conclude Module 2
<p style="text-align: center;">Assign CA (If Applicable)</p>	<p><i>Note: For self-referred clients that would like to register with another service provider, the Employment Caseworker will assign the CA to SSM.</i></p> <ol style="list-style-type: none"> 1. On the <u>Summary Page</u>, use the Service Delivery Site and Employment Caseworker fields drop down menu to assign the CA to the ongoing caseworker 2. Click “ASSIGN ASSESSMENT” 3. The page will refresh; a message will display at the top of the page confirming the assessment has been successfully assigned
<p style="text-align: center;">Submit Application</p>	<p><i>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.</i></p> <ol style="list-style-type: none"> 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 the bottom of the page and click “SUBMIT ASSESSMENT” 4. Once the assessment is submitted, a message will load at the top of the page showing the CA has been successfully submitted 5. Once the assessment is submitted, the client’s stream will be determined and an EAP can now be created in CaMS