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. From the landing page conduct a search using the Common Assessment number (CA1234567). 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. Locate the CA you would like to complete and click the "**EDIT**" button
Notes	***Note:*** Caseworker notes *can be viewed at beginning of 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. Module 1 will load and the "Note" text box will be displayed at the top of the page. Here you will be able to see any notes added by the Social Assistance caseworker. 2. Add a note in the text box that includes the ongoing caseworker contact information (name, number, ext., email etc.) ***Refer to Job Aid: Case Note Guide for the template.*** 3. Click "**SAVE**" 4. Scroll down the page until you see the heading Client Background Information.
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. Briefly review the completed following sections of Module 1 (M1) with client to ensure the information is still accurate and correct. Make any edits if necessary: o Basic Information

	◦ Mail Address & Contact details ◦ Demographics ◦ Education ◦ Skills Supports ◦ Support Needs 2. At the bottom of the page select the "Service Level Determination (SLD)". ***Note**: For SLD, all Social Assistance clients will be case managed* 3. If any changes have been made to Module 1 click "**Save and Resume Later**" to ensure no new information is lost. ***Note:** Saving periodically throughout completing the common assessment is recommended best practice.* 4. Click "**PROCEED TO NEXT STEP**"
M2 (Module 2)	1. On the Income and Employment page complete the following sections of Module 2: ◦ Income and Employment ◦ Disability Information ◦ Employment Status and History ◦ Employment Goals 2. Click "**Save and Resume Later**" 3. Click "**Next to Proceed**" to conclude Module 2 4. The Summary page will load
Reassign CA (If applicable)	***Note:** For clients that would like to register with another service provider, the Employment Caseworker will assign the CA to WREN (e.g., SSM - Windsor-Sarnia)* **If the CA needs to be reassigned to another Caseworker:** 1. On the Summary Page 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 Summary Page you can add additional notes in the note box if needed

	2. Scroll down and review a read-only summary of Module 1 and Module 2 to ensure all the information it correct. **Note:** If any corrections need to be made, click "*Return to previous step*" at the bottom of the screen. 3. When ready to submit the Common Assessment, click "**SUBMIT ASSESSMENT**" at the bottom of the page. 4. 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
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 WREN* 1. On the Summary Page, 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 Employment Ontario Caseworker Information Section click the drop down arrow from the Service Delivery Site field and select the "**SSM**" 3. Click "**ASSIGN ASSESSMENT**"