

Standardized Needs and Assets Assessment Template

Explanation:	<p>This template collects essential information on a client's needs and assets to provide appropriate referrals for both IRCC and Non-IRCC funded services. The questions in this template are to be used as a guideline for all IRCC-funded service provider organizations to inform the development of their client assessment template in delivering the Needs and Assets Assessment and Referrals Service (NAARS). Please complete the assessment in the language of preference for the newcomer and, follow a conversational style, if possible. Questions denoted with an asterisk are mandatory for IRCC reporting through the NAARS iCARE module. Newcomers should be informed of the existence of services offered in French by Francophone organizations (including NAARS) in their area and should be referred to Francophone services providers if it is their preference.</p>
Instructions:	<p>Some questions may not be suitable for all newcomers. Please use your discretion when using this template to ensure the following: you only ask those questions that you believe could lead to a referral to a service that you know exists within your community or online and which could meet the newcomer's need; you are mindful of the time commitment of the client, and may skip questions that are unnecessary given the newcomer's specific circumstances; you ask ALL newcomers ALL questions indicated with an asterisk (*) as it is mandatory to report the responses to these questions to IRCC through the NAARS iCARE module. Part 3 of this form is used to assess whether a client should receive a referral to a case management service provider for eligibility assessment for case management. Please feel free to take additional notes throughout the assessment if needed. Only report the mandatory responses to IRCC via iCARE.</p>

Section	Questions	Responses
Part 1: Client Intake	This portion of this form should be completed before the assessment begins. If you have already collected this information from the client, please move on to Part 2 of this form.	

Support Services	<p>*Did the client require any of the following support services to enable them to complete this assessment **(Only offer supports that your organization is able to provide)**</p>	Childcare	
		Transportation	
		Provisions for persons with disabilities (including services for people with disabilities such as ASL interpretation, screenreaders, etc.)	
		Written Translation	
		Oral Interpretation	
		Digital supports (to access IRCC-funded settlement services being delivered remotely – includes digital skills and provision of digital devices)	
		Short Term Counselling	

Client Intake	*Unique Client Identifier (UCI)		
	*Date of Birth		YYYY-MM-DD
	*Contribution Agreement		
	NAARS Case Worker		
	*Assessment/Start Date		YYYY-MM-DD
	*Preferred Official Language	<i>Please inform ALL clients of the existence of services offered in French by Francophone organizations in their area. Clients should be given the choice to be referred to Francophone services providers if they wish to access services in French.</i>	English French Unknown/No Preference
	*Language of service		
	*Assessment Delivery Format		In-Person Telephone/ Email/Text Online/Digital staff-led Online/Digital Self-directed
	*Postal Code where the service was received	If virtual, please insert the postal code of the SPO delivering the service	
	*Type of service location Institution/Organization Where Client Received Services: (Choose only one)		<ul style="list-style-type: none"> o Settlement service provider o Public library o Elementary school o Secondary school o Post-secondary institution o Healthcare institution o Community centre/ neighbourhood house o Employment agency o The client's home o The client's place of work o A public space (shopping centre, etc.) o Port of entry o Not for profit organization

Client Information	Preferred Language of Assessment		
	Legal First and Last Name		
	Preferred Name		
	Gender (optional)		
	Country of Birth/Country of Citizenship		
	Date of arrival in Canada		
	Marital Status (e.g. Single; Separated; Married; Divorced; Common Law; Widow/ Widower)		
	Spouse/Partner:	Name	
		Date of Arrival	
		Date of Birth	
		Gender	
		Languages	
	Child(ren):	Name	
		Date of Birth	
		Languages	
		Name	
		Date of Birth	
		Languages	
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		Date of Birth	
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Date of Birth			
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		Name	
		Date of Birth	
		Languages	
		Name	
		Date of Birth	
		Languages	
	Have you completed NAARS before?	Do you have an existing settlement plan?	
		Number of NAARS completed?	
	Are you currently receiving settlement services from any other Service Provider Organizations?	Name of Organization and Program:	

Contact Information	Do you provide consent to be contacted?		
	What is the best way to contact you?		
	Do you have an email address?		
	Do you have a phone number?	Is your phone textable?	
	Do you have an emergency contact in Canada?	Emergency contact name?	
		Emergency contact phone number?	
		Emergency contact relationship to you?	
	What is your current address?		

Guiding Questions	Do you have an idea of what you would like to get out of this assessment?	<i>What are the newcomers' settlement objectives?</i>	
	Are there resources or services that you would like to access immediately?		
	Do have any friends, extended family members or people you know already in your new community?		
	*What are your top 3 settlement priorities? (please insert the number 2,1 and 3 in the next column)	a) Basic needs	
		b) Language & literacy	
		c) Employment, education, and career training	
		d) Family and Children	
		e) Government, finance & legal aid	
		f) Social supports & community connections	

Part 2: Client Assessment	Ask the client the following questions, and use the information collected during the assessment to complete Part 3 of this form. Some questions may not be suitable for every client, and portions of the assessment may be skipped to save time if the newcomer feels that a section of the assessment does not apply to their specific circumstances. Please use discretion when considering which questions are applicable in each newcomer's unique situation.
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*Does the newcomer indicate that they require assistance with basic needs		Yes: Continue with this section	No: Skip to Language and Literacy
Basic Needs	1. Are you connected to any other services that can help you get settled in Canada? If yes, which ones?		
	*2. Do you require additional clothing?		
	*3. Do you require any assistance acquiring food?		
	*4. Do you require any personal care items or childcare products?		
	*5. Do you need additional supplies for you or your family?		
	6. Do you have any urgent medical concerns at this moment?		
	7. Are you comfortable with the use of technology (for example, are you comfortable: using a mobile device, computer, or tablet; searching for information online, downloading and using mobile apps, etc.)?		
	8. Do you have access to a tablet or computer that can be used to access services?		
	9. Do you have access to the internet or Wi-Fi?		
	10. Do you need help with managing and scheduling appointments?		
	11. Do you need help filling out forms or letters?		
	*12. Do you feel safe and secure at home? <i>(This question requires sensitivity and may require asking individuals separately for safety, as per policies on violence/abuse)</i>		
	13. Would you like to be connected with services that can help you with mental health and well-being?		
	14. Do you need help navigating the local transit systems and commuting in your settlement city? (Public transport, car travel, biking, etc.)		
	15. Do you require any help regarding your current housing situation?		
	16. Do you or any of your family have any needs or personal circumstances we should be aware of that may impact your temporary or permanent accommodation requirements		

***All clients must be asked language-related questions:**

Language and Literacy	*17. Are you able to speak, read, write in or understand English?		
	*18. Are you able to speak, read, write in or understand in French?		
	*19. Francophone services are available within this community. Would you like to receive settlement services in French offered by a francophone organization?		
	20. Would you like to receive settlement services in English offered by an anglophone organization?		
	21. Which other language(s) do you speak?	*a) Specify the language	
	22. Are you able to read and write in your own language(s)?		
	23. Did you complete a language assessment in Canada?	a) CLB/ESL Level?	
		b) If no, do you want to schedule a Language Assessment?	
	*24. Are you interested in language training in class with a teacher or any other similar types of formal language learning?	<i>Note: French-speaking newcomers and allophones settling in Francophone minority communities (FMCs) are eligible to adapted language training (a combination or sequencing of English and French language instruction)</i>	
		a) Would you like to attend formal language learning in English or French?	
	*25. Are you interested in language learning through conversation circles/groups, homework clubs, peer support groups, writing workshops or any other kind of similar informal language learning?	a) Would you like to attend informal language learning in English or French?	

*Would the newcomer like help with: finding employment in Canada; getting their credentials (education, certifications, etc.) recognized in Canada; obtaining an education in Canada.		Yes: Continue with this Section	No: Skip this Section
Employment, Education and Career Training	*26. Do you have previous work Experience in Canada?	Yes/No	
		If yes, how many months or years?	
	*27. Would you like to learn more about working in Canada? (ex: labour laws, employee rights and responsibilities, occupational health and safety, Workplace Hazardous Materials Informations System, codes of conduct, etc.)		
	*28. What is your Employment Status?	a) Employed Full-time	
		b) Employed Part-time	
		c) Language Student	
		d) Caring for Family Member(s)	
		e) Volunteer Placement	
		f) Pre-employment Training	
		g) Unemployed	
h) College/University			
i) Professional Re-designation			
j) Other (specify)			

	*29. Are you seeking employment?	Yes/No	
		*a) Would you like to obtain employment within one year?	
		b) Do you need information on how to find employment?	
		c) Do you need assistance or supports with finding employment (e.g. job counselling, training program, work placement)?	
		d) Do you need help drafting a cover letter, resume, help with interview skills, etc.?	
		e) Would you like to be connected to an informal career mentor?	
		f) Would you like to be connected to volunteer opportunities?	
	30. What are your employment objectives?	a) Short-term (in the next three months)?	
		b) Medium-term (three to twelve months)?	
		c) Long-term (more than a year)?	
	*31. Do you know the type of work you would like to do?	TEER 0 - Management occupations	
		TEER 1 - Occupations that usually require a university degree	
		TEER 2 - Occupations that usually require: a college diploma; apprenticeship training of less than 2 years; or supervisory occupations	
		TEER 3 - Occupations that usually require: a college diploma; apprenticeship training of less than 2 years, or more than 6 months of on-the-job training	
		TEER 4 - Occupations that usually require: a high school diploma; or several weeks of on-the-job training	
		TEER 5 - Occupations that usually need short-term work demonstration and no formal education	

	32. What was/were your previous occupation(s)?	a) How many years were you in your profession/or at your workplace?	
	*33. Do you require credential recognition or are you seeking to obtain a licence to work in Canada?	Yes/No	
		a) Would you like help beginning this process?	
		b) Do you need an Education Credential Assessment to assist with employment (indicates Canadian equivalency) or to continue pursuit of education?	
		c) Do you require help with foreign qualification or credential recognition to work in a regulated occupation or trade?	
	*34. Do you have specialized skills or volunteer experience that could help you to find work, or that could otherwise be an asset to your community? Please specify the industry of your specialized skills and/or your volunteer experience.	For example: Health, Agriculture, Gardening, Horticulture, Cooking, Carpentry, Lumber industry, Oil industry, Volunteering, Early education teaching skills, Special education skills, etc.	
	35. Do you require help with starting a business?		
	*36. Do you have any specialized training? Or have you worked in a regulated occupation/trade?		
	37. Are you interested by work that does not require formal education (agriculture, manual labour, kitchen, etc.)?		
	*38. What is your Level of Education? Do you have a Degree, Diploma, or Certificate?	a) In which Country did you receive your credentials?	
		b) Have your credentials been evaluated in Canada?	
		c) Have your credentials been evaluated in another country (other than Canada) outside of your home country?	
39. Do you have any incomplete formal education?	Yes/No		
	a) if yes, how many years have you completed and in which field?		

	40. What educational objectives do you have?	a) Are you interested in continuing or upgrading your education in Canada?	
	41. Do you require information on education? (Programs, courses, etc.)	a) Do you require information for applying to student aid?	
	42. Do you need any other employment support?		

*Would the newcomer like help with accessing Family services, programming for their child(ren), information about social networks and groups for their child(ren), help with enrolling their child(ren) in school, etc.?		Yes: Continue with this Section	No: Skip this Section
Family and Children	*43. Do you require help enrolling your children in school?		
	44. Do you need help enrolling your children that are younger than 5 years old to a kindergarten or to pre-school?		
	45. Do you have a school preference for your children/youth?	a) Do your children require education in a special needs establishment?	
		b) Do your children require assistance with sign language in their school?	
	46. Would you prefer your children to attend school in French, in English or in French immersion at an English school?		
	47. Do you need help with your children's online learning, should online learning be required? Should online learning be required, would you require assistance?		
	48. Would your children benefit from a referral to the Settlement Workers in Schools (SWIS) program (if available and not already provided)?	a) Would you like to learn more about SWIS?	
		b) Would you like to be referred to francophone SWIS (travailleur d'établissement dans les écoles - TEE)?	
	49. Do you need an afterschool program for your children?		

	50. Do you require assistance communicating with school staff?		
	51. Do you require information about school clubs/activities?		
	52. Are you aware of children/youth community programming?	a) Do you require information about youth activities, or after school & weekend programs, such as: sports and recreational activities; volunteering; leadership programs; home-work clubs; etc.?	
	53. Are your children displaying behavioural issues or being victim of bullying?		
	54. Do your children (and do you) feel safe and secure at school and at home?	*This question requires sensitivity and may require asking individuals separately for safety, as per policies on violence/abuse.	
	55. Would you like to be referred to resources or services to assist with challenges you are experiencing in your family related to behaviours, mental health, addictions, well-being, relationships, legal or safety concerns?		

*Would the newcomer like to increase knowledge of the following: Community and Government		Yes: Continue with this Section	No: Skip this Section
Government Services, Finances, and Legal Aid	*56. Does the client require help obtaining any of the following:	a) Social Insurance Number	
		b) Driver's licence	
		c) Application for provincial resident card	
		d) PR card (or a change of address, requiring a new PR card)	
		e) Senior Benefits	
		f) Canada Child Benefit	
		g) GST/PST rebate	
		h) Provincial Health Card	
		i) Interim Federal Health program	
		j) Initial health check up	
		k) Services and funding for children with disabilities	
		l) Disability benefits, support/programming	
		m) Tax credits from the CRA	
		n) Application for affordable housing	
	*57. Would you like to learn more about life in Canada, the Canadian Government, the Canadian education system, etc.?	Refer to Information and Orientation Services: (Yes No)	
		a) If the newcomer is receiving this assessment in pre-arrival (before they arrive in Canada), would they like to receive help determining where in Canada they would like to settle?	
	58. Would you like to learn more about your immigration status and legal documents?	Refer to Information and Orientation Services: (Yes No)	
	59. Do you require help understanding the governmental supports available to you?		

	*60. Do you intend to become a Canadian Citizen?	Yes/No/Unsure	
	61. Do you require information about the Canadian legal system, legal aid, and community legal clinics?		
	62. Do you require information on finances in Canada?	a) Opening a bank account	
		b) Using a bank card	
		c) Paying rent and utility bills	
		d) Mobile and internet banking services	
		e) Loans, debt, credit, mortgages in Canada	
		f) Would you like to gain more knowledge in financial literacy?	
		g) Do you wish to be referred to Social Assistance programs?	
		h) Other financial services	

*Would the newcomer like to increase any of the following: Social networks; Access to local community services; Level of community involvement		Yes: Continue with this Section	No: Skip this Section
Social Supports and Community Connections	63. Do you wish to be connected to a Francophone, Anglophone, or other linguistic community in Canada?		
	64. Do you require information on cultural activities or other ways to get involved in your/a community?		
	*65. Would you like to be connected to community groups within your community?	a) Do you have any hobbies or interests that may help you to find groups with shared experiences?	
		b) Would you like to be connected with other newcomers in Canada?	
		c) We can provide referrals to community groups such as local resources for seniors, women, youth, 2SLGBTQI+ , persons with disabilities. And on different topics such as relationships, childcare, parenting, occupation-specific, professional networks, addressing abuse, or dealing with financial concerns.	
	66. Would you be interested in being connected with a Canadian friend/volunteer or established immigrant for additional support?		
	67. Would you be interested in being connected with a mentorship program?	a) Do you have any preferences on the type of mentorship program?	
	68. Would you be interested in being connected with a religious/ ethno-cultural community in Canada?		

	<p>*69. Have you experienced any instances of discrimination or racism in any of the following environments since arriving in Canada? Would you like to be connected with supports that can help you to address these challenges?</p>	<p><i>Discrimination is the unfair treatment of a person or group of people based on the groups, classes, or other categories to which they belong. Reasons for discrimination include, but are not limited to: a person's race, gender, religion, nationality, ethnicity (culture), or other personal traits.</i></p>	
		a) In a work environment (in interviews or with colleagues)	
		b) In school, or in the child(ren)'s school (by teachers or peers, administrators)	
		c) In housing (in finding housing or in shared living accommodations)	
		d) In settlement services (in any immigration organization)	
		e) In the community (stranger, police, etc.)	
		f) Other, please specify.	
		<p>70. Do you need any services for other people in your family?</p>	<p>a) Please detail: First Name, Last Name, Date of Birth, Phone Number, Relationship to You</p>

***Complete the following section to ensure all of the newcomer's assets have been captured.**

Assets	71. Certifications		
	72. Language skills		
	73. Other Communication Skills (e.g. ASL) - please specify		
	74. Computer and Technical skills		
	75. Creative/artistic skills (i.e. music, art, etc.)		
	76. Customer service experience		
	77. Education		
	78. Employment		
	79. Entrepreneurial skills		
	80. Family and home organizational skills		
	81. Finance and investment skills		
	82. Interpersonal skills		
	83. Leadership skills		
	84. Management skills		
	85. Organizational skills		
	86. Social capital (friends/family/ support system)		
	87. Valid drivers license - please specify type		
	88. Administrative skills		
	89. More specialized assets (For example: Health, Agriculture, Gardening, Horticulture, Cooking, Carpentry, Lumber industry, Oil industry, Volunteering, Early education teaching skills, Special education skills, etc.)		
	90. Other - please specify		

*Will the newcomer require any support services to access the referrals they receive following this assessment?		Yes: Continue with this Section		No: Skip this Section
Support Services Required	Does the client require any support services to access the referrals	Childcare		
		Transportation		
		Provisions for persons with disabilities (including services for people with disabilities such as ASL interpretation and screenreaders)		
		Written Translation		
		Oral Interpretation		
		<p>Digital Supports: Is the client interested in accessing any of the referral services remotely (e.g. online services)?</p> <p>Note: Digital supports only entail support to access remote IRCC-funded settlement services. If clients express a broader interest or need to enhance digital literacy (i.e. support to use technology or the internet for personal or professional purposes), clients can be informed of organizations funded under other government programs (e.g. Innovation, Science and Economic Development Canada's Digital Literacy Exchange Program) that support digital literacy.</p>	Yes: Continue with this Section	
			Do you need a training session or other assistance to make sure you are comfortable navigating a remote settlement service or using a device to access remote settlement services?	
			<p>Do you require a loan of a digital device (e.g. laptop, tablet, cell phone) to access remote IRCC-funded settlement services?</p> <p>Note: Please ensure that clients are aware of other resources that exist in their area such as libraries, schools or community centres and have exhausted all other options before referring them to a loan of device(s). Clients should be made aware that the loan is only for the duration that they access a specific settlement service.</p>	
		Short Term Counselling		

The Rest of this Form should be Completed by a Settlement Worker After the Initial Assessment is Complete

Part 3: Referrals to Case Management Eligibility Assessment	Newcomers expressing persistent multiple barriers may be eligible for Case Management. This tool is used to determine whether a client should be referred to a Case Management service provider for further eligibility assessment or to Well-Being Navigation as required. Settlement workers should use their discretion when evaluating whether a newcomer should receive a referral to an eligibility assessment for Case Management. Clients who express persistent multiple barriers (Scoring 9+) should be referred to case management services for eligibility assessment. The final score should be the total of Class 1 and Class 2 Indicators.
Example	Any newcomer who scores over 9+ when adding the totals for Class 1 and Class 2 Indicators may be referred to case management services for eligibility assessment. For instance, a newcomer who is found to have two or more <High> class 1 indicators (i.e. no social contacts (+5), no language skills (+5) = 10) could receive a referral to case management services for eligibility assessment at the discretion of the assessor.

Class 1 indicators	No Referral (+0)	Possible Referral to Case Management Eligibility Assessment (+3)	Possible Referral to Case Management for Eligibility Assessment (+5)
Knowledge of English/French	Fluent orally; can read, write, excellent numeracy	Reads and speaks in full sentences, and some writing and numeracy (+3)	Basic language skills (+5)
Knowledge in First Language of the Newcomer	Fluent orally; can read, write, excellent numeracy	Fluent orally; some ability to read/write, some numeracy (+3)	Fluent orally with basic reading/writing/numeracy (+5)
Education	12+ years of formal education	7 to 12 years of formal education (+3) 0 to 7 years of formal education (+5) Employment Skills Ready for labour market	0 to 7 years of formal education (+5)
Employment Skills	Ready for labour market	Needs support, or to upgrade training (+3)	Needs significant employment training (+5)
Previous Living Conditions	Developed setting	Displaced or living in a refugee camp (+3)	Displaced or living in a refugee camp (+5)
Social Supports in Canada	Knows 4+ people in their community	Knows 1 to 3 people in their community (+3)	no social contacts (+5)
Family Size	2 to 4 people	5 to 6 people (+3)	7+ people (including parents and dependants), single or single parent (+5)
Settling in Canada	Client is adapting	Presents challenges but is capable of settling without significant intervention (+3)	Requires urgent help settling in their community in Canada (+5)

Total: _____

Class 2 indicators	No Referral (+0)	Possible Referral to Case Management Eligibility Assessment (+5)	Referral to Case Management for Eligibility Assessment (+10)
Health	No Concerns	Has health concerns but is stable and managing/ receiving support (+5)	Has health concerns and requires support (+10)
Disability	Not applicable	Has concerns but is stable and receiving the support that is meeting their needs (+5)	Has additional and/or pressing unmet needs (+10)
Advocacy	Does not need advocacy services	Needs advocacy related to their settlement in Canada (+5)	Needs advocacy services with outside systems (+10)
Mental Health and Wellbeing	Appears stable, and does not appear to require assistance	Shows some distress but is coping and has support (+5)	Presenting or indicates the need for help (has unmanaged depression, anxiety, suicidal thoughts, etc.) (+10)
Personal/Familial Safety	Not applicable	Not applicable	Presents indications of any form of abuse (mental or physical) (+10)
Congruent or Incongruent	Congruent: responses align with the behaviour observed during the assessment	Not applicable	Incongruent: responses do not align with the behaviour observed during the assessment. (+10)

Total: _____

Total of Class 1 and Class 2 indicators: _____