



Initial Assessment Guide

Name (First, Middle, Last):

Last 4 SSN

INSTRUCTIONS:

Use this form to help guide the questions to ask customers during an Initial Assessment. Then, use the information to populate the case note in CalJOBS and enter the 102 activity code.

General Information

Employment Goal

Work History Summary (Experience in months/years, include special skills):

Education/Training (Diplomas, licenses, certificates, etc. If currently attending school or training, provide details.):

Transferable Skills (Knowledge, skills and abilities):

Potential Challenges/Barriers to Employment:

Transportation (Explain: Suspended DL, owns vehicle, use public transit, etc.):

Legal/Court/Convictions (Misdemeanor/felony convictions, active parole/probation status, etc.):

Family/Housing:

Financial/Income (Specify amount/source of income. Examples: \$2,500 mo. wages, \$350 wk. UI, supported by parents, etc.):

Needed Assistance: (Based on the information gathered, identify what services and resources the customer needs)

NOTE: Remember to add the case note and activity code.