VRIS UPDATE

Task Note Guidelines
Effective 9/1/11
Number 318

SUMMARY OF UPDATES

A policy on task note guidance has been developed. Recommendations were received from a committee that included field staff. Committee members also gathered input from co-workers. The recommendations were sent to all office directors to share with teams for input. The recommendations were also sent to program directors for input. The guidelines were approved at the DIG meeting on 8/2/11.

The guidelines address what actions should be documented in task notes, what the content of task notes should be and what headers will be standard in QUEST.

VRIS POSTING

The new policy 'Task Note Guidelines' has been posted in the Policy section in the Program Manual.

Several chapters in the Program Manual have minor revisions to add the requirement of a task note entry. The chapters revised are:

Rule 72 Fee Schedule Exception Criteria
Employment Discussion
Transition
Employment Services
Case Service Procurement
Consumer Background Screening Policy

QUEST UPDATE

New standard task note headers have been programmed into QUEST. They are:

Benefits Orientation
Career Planning
Orientation/Employment Discussion
Employment Follow up
Exception Rationale
Office Director/Program Director Approval/Disapproval
Job Placement Services
Job Search Agreement/Review
Termination Rationale
Case Advance Verification

MONITORING REQUIREMENTS

Team members are responsible for adhering to the guidelines and holding teammates mutually responsible. OD, PD and Team case reviews will also monitor for compliance with the guidelines.

TEAM COMMUNICATION

ODs should fully discuss the guidelines with all team members. Review the policy and the chapter revisions that describe content of the task notes. The revisions to the Employment Discussion chapter, in particular, should be reviewed in detail as it includes very specific requirements.

LEADERSHIP CONTACT

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