Clear Form Print

Clerical Compliance Review Instrument
(5/3/2018)

1. Is client information accurately entered into the data system based on the referral and application? (name, DOB, contact information, etc) ☐ YES ☐ NO ☐ N/A

   Comments:____

2. Are client files following the case file order? ☐ YES ☐ NO ☐ N/A

   Comments:____

3. Is information filed chronologically in the appropriate section of the case file folder with the most recent items toward the top of the respective section? ☐ YES ☐ NO ☐ N/A

   Comments:____

4. Is information filed promptly so that the case file record is up to date?
   Things to look for: medical/school records reflected to have been received in task notes authorizations reflected in quick pay or task notes, letters sent/received reflected in, task notes, resumes/job information reflected to have been received in task notes, etc)
   ☐ YES ☐ NO ☐ N/A

   Comments:____

5. When requesting necessary medical, school, demographic, public benefit, financial, and employment information is it date stamped and entered into the data system as received?
   ☐ YES ☐ NO ☐ N/A

   Comments:____

6. Is timely follow up of records not received being performed and reflected in a task note? ☐ YES ☐ NO ☐ N/A

Comments:____

7. Follows release and confidentiality guidelines in VRIS:
   a. Assures that paper records, letters, posted lists of client names, and other materials with personal identifiable information are not in plain view in office areas when clients are in the area. ☐ YES ☐ NO ☐ N/A

   Comments:____

   b. Assures that open QE2 is not in plain view for clients to see. ☐ YES ☐ NO ☐ N/A

   Comments:____