

Task Note Case Review instrument

1. Are words complete (no Text language or shorthand)? YES NO
a) If an acronym is used, is it spelled out at least once in the task note? YES NO N/A
2. When using a person's name, other than the client, was a descriptor used so other staff can identify who the person is? An example would be 'John (client's father)'. YES NO N/A
3. Does every entry have a header? YES NO
a) If the standard header did not pertain to task note, does the header created make sense for the task note content? YES NO N/A
4. Are emails either paraphrased or is just the main idea copied in the task note versus the entire email? YES NO N/A
5. Are narratives concise and include only pertinent information? YES NO
6. Do entries indicate the method of contact or attempted contact - in person, face to face, by phone, e-mail, letter, etc.? YES NO
7. Are conversations with NDE Legal Counsel limited to any decision rendered, direction provided, or requested action? The summary should not include any detailed rational or commentary. YES NO

8. Are the following entered as Task Notes?

- Summary of the Employment Discussion YES NO
- Unsuccessful attempted client contacts YES NO N/A
- Exception Rationale YES NO N/A
- Office Director or Program Director Approval or Disapproval YES NO N/A
- No Shows; when a client or staff member does not show for an appointment YES NO N/A
- Decision on referral of previously terminated case YES NO N/A
- Vocational Evaluation Referral; the date the client is referred for a vocational evaluation YES NO N/A
- Completion of Vocational Evaluation YES NO N/A
- Completion of a Job Search Agreement form YES NO
- Completion of a 90-Day Review of Job Search Agreement YES NO
- Justification for providing post-secondary training as an assessment service YES NO N/A
- Justification for purchases YES NO N/A
- Completion or Termination of an OJE or OJT summary YES NO N/A
- Background Screening results YES NO N/A
- Verification that items purchased by 'cash advance' were obtained and method of verification YES NO N/A