

Task Assignment & Monitoring Checklist

Match restrictions from the TTA to duties that accommodate the employee's limitations.

SECTION 1: Medical Documentation Review (Pre-Assignment)

Before assigning any duties:

- () Obtain the medical report from the **Authorized Treating Physician (ATP)**.
- () Record the **date of the medical report**.
- () Note all **work restrictions** listed by the physician.
- () Record any **follow-up appointment instructions**.
- () If restrictions are **ambiguous, contact the claims adjuster or nurse case manager** for clarification.
- () Confirm all clarifications **in writing** before proceeding.

SECTION 2: Identify Task Requirements and Options

- () Compare the current **restrictions** against the **physical demands** of potential tasks.
- () Ensure that **no assignment exceeds** the documented limitations.
- () Refer to the **Transitional Duty Task Bank** or **District Task List** to identify:
 - Tasks that match specific medical restrictions.
 - Tasks suitable for a **range of limitations, accommodations, or modifications**.
- () Select only tasks that can be completed **safely and productively**.

SECTION 3: Compliance Tracking

Written Instructions:

- () Provide the employee with a **written duty list and daily schedule**.
- () Ensure expectations are clear and documented.

Duty Changes:

- () Instruct the employee **not to change tasks or schedule** without prior **supervisor approval**.

SECTION 4: Supervisor Oversight and Productivity

Supervisor Oversight:

- () Assign a designated supervisor (e.g., **Lead Custodian**) to:
 - Observe limitations or improvements
 - Ensure compliance with restrictions
 - Maintain a daily log of tasks and address issues in real time

Establishing Metrics

- () Use **scheduled time blocks** to assess output and pace.
Example: 2:00–3:00 – cleans water fountains; 3:00–4:00 – cleans desktops.

SECTION 5: Monitoring Medical Recommendations

Medical recommendations may change. Be sure assignments match the most recent medical recommendations.

- () Monitor updates to the TTA and medical reports regularly.
- () Any concerns, contact the workers' compensation contact to elevate to the insurance provider.