



PROBATION AND PAROLE BUREAU STANDARD OPERATING PROCEDURES

Procedure No.: P&P 210-1	Subject: MONTHLY WORKLOAD REPORT
Reference: 46-23-1004, MCA	Page 1 of 4
Effective Date: 06/01/00	Revision Dates: 10/04/01; 03/06/04; 04/22/14
Signature / Title: /s/ Ron Alsbury, Probation & Parole Bureau Chief	

I. BUREAU DIRECTIVE:

Probation & Parole Officers will follow established procedures to accurately record and report workload data.

II. DEFINITION:

Bureau – The Montana Probation & Parole Bureau.

Department – The Montana Department of Corrections.

III. PROCEDURES:

Probation & Parole Officers (Officer) will provide accurate workload data to their supervisor as directed. Each region will submit the workload data through the information system by the 10th of each month.

A. The following definitions apply to completion of *P&P 210-1(A) Monthly Workload Report*; however, these definitions do not apply to Institutional Probation & Parole Officers (IPPO) and Intensive Supervision Program (ISP) Officers.

1. REGION

- a. Level I, Level II, Level III, Level IV, Level V: Enter the number of offenders in each of the categories according to the supervision level of the offender. Do not include offenders new to the Officer's caseload for the month. These offenders will be captured under the "New" category.
- b. New: Enter the number of new offenders assigned to the Officer's caseload for the month. This includes parole, probation, and conditional release offenders, interstate transfers, transfers from another office, and mental health institutional transfers. Offenders transferred from one caseload to another within the same office will not be considered "New." Offenders listed in this category **will not** be included in the number listed for Level I, Level II, Level III, Level IV, or Level V. After the offender is initially classified as "New," he/she will then be placed on the appropriate supervision level category for the following month.
- c. Pre-Sentence Investigations (PSI): Enter the number of PSIs assigned to Officer during the month. Officers will receive full PSI points in this category when completing *P&P 30-1(B) Pre-Sentence Investigation* in place of *P&P 30-1(F) Post-PSI* [see *P&P 30-1 Pre-Sentence Investigation (PSI) and Report/Post-Sentence Investigation*].

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- d. Placement Investigations (Place): Enter the number of placement investigations Officer is assigned for the month. This includes parole placement investigations, interstate placement investigations, executive clemency/pardon investigations, and furlough investigations. Do not include conditional release investigations in this category.
- e. DOC Commits (DOC Com): Enter the number of DOC Commits Officer completes during the month which included completion of *P&P 150-1(A) Notification of Offenders Sentenced to DOC or MSP/MWP*, *P&P 150-1(D) Verification of Commitment* (when applicable), referral to an ACCD program/facility, and coordination of photos and fingerprints.
- f. Conditional Release Investigations (Cond Rel): Enter the number of conditional release placement investigations assigned to Officer during the month.
- g. Post-Sentence Investigation (Postpsi) – Enter the number of Post-PSIs assigned to Officer during the month. This is the abbreviated version of the PSI as reflected in *P&P 30-1 Pre-Sentence Investigation and Report/Post-Sentence Investigation*. If the Officer completes *P&P 30-1(B) PSI* in place of *P&P 30-1(F) Post-PSI*, this case will be reported under “PSI Investigations” as indicated above to receive full PSI points.
- h. Work Credit: Enter the number of documented hours Officer worked on any of the following assigned duties that are outside normal caseload duties:
 - i. Instructing: firearms; self-defense; SIMMS; OC; First Aid; MORRA/WRRNA
 - ii. Security Threat Groups/Gang Coordinator/P&P Regional Intelligence Liaisons
 - iii. Supply/Equipment: UA Officer; Evidence Officer, Firearms Control Officer; Armorer
 - iv. Facilitation of offender groups outside of assigned caseload: CP&R; Thinking for a Change
 - v. Other: Includes assigned hospital security of offenders; transporting placed offenders from a prerelease center to a local jail.
- i. Total Miles: Enter the amount of miles Officer drives or is a passenger while conducting Department business. This **does not** include commute miles. Miles as a driver or passenger in a state vehicle will be reported on *P&P 20-4 (B) Log Sheet* assigned to and kept in each state vehicle. If required by regional procedures, log sheets will be attached to *Monthly Workload Report* to validate miles reported.
- j. Points: This category is automatically entered by the computer system. The total equals the number of points added from all the categories completed by Officer.
- k. FTE (fte): Computer-generated calculation that describes the workload ratio of Officer.

2. SUPERVISORS

- a. Hearings: The number of on-site, disciplinary, and intervention hearings conducted by the Supervisor during the month.
- b. Prerelease (PRC) Screenings: Enter the number of offenders screened at prerelease center screenings the Supervisor attended during the month. This does not include prerelease screenings conducted at other ACCD facilities.

3. SPECIALIZED SUPERVISION CASELOAD

Enter the number of specialized offenders on Officer’s caseload for the month including the number of offenders screened and the number of offenders accepted for the month.

- a. Reentry: When working specifically for reentry offender, must also include documentation of these hours on Officer’s monthly workload report:
 - i. *Case Manager Hours (Case Mng)* – The hours Officer spends with case management team meetings (either in the community with their developed case management/reentry team, or the reentry Officer is in consult with the prison IPPO and/or Institutional case management team). Case manager hours should not be hours the Officer is meeting with the offender in the office or the field.
 - ii. *Resource Development Hours (Rsc Dev)* – The hours an Officer spent contacting a funding/ resource provider (i.e., YMCA).
- b. ISP
- c. Day Reporting Programs
- d. Native American
- e. Smart Probation
- f. DUI
- g. Mental Health
- h. Chemical Dependency
- i. Sexual Offender
- j. Co-Occurring
- k. Banked Caseload
- l. Treatment/Mental health/Veterans Court
- m. Booter (TSCTC)
- n. Gangs

4. REPORTS WRITTEN

Enter the number of *P&P 100-1(A) Report of Violation* completed on probation and parole offenders for the month.

5. HEARINGS

Enter the number of on-site, intervention, and disciplinary hearings conducted for the month for the entire region. This number should balance with the total of all numbers reported in each “Supervisors” section.

6. DOC COMMITMENTS INITIAL PLACEMENT

Enter the number of *P&P 150-1(C) Initial Screening & Placement Warrant* completed by the Regional Administrator (RA) during the month identified by the location of the placement.

B. PROCEDURE:

1. Workload data is collected for each Officer in region.
2. *P&P 210-1(A) Monthly Workload Report* is completed and submitted to the immediate supervisor.

RESPONSIBILITY:

- P&P Officer
Administrative Support
- P&P Officer
Administrative Support

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| 3. <i>Report</i> is forwarded to administrative support responsible for compiling region's monthly statistics. | RA/POII |
| 4. Statistical ledger is reviewed for accuracy. | RA |
| 5. Regional caseload statistics are entered into the information system. | Administrative Support |
| 6. Workload analysis is developed and provided to Bureau Chief. | DOC Statistics Bureau |
| 7. Completed analysis is provided to RAs. | Bureau Chief |
| 8. Analysis is utilized as a guide for the distribution of work in the region. | RA |

IV. CLOSING:

Questions concerning this procedure shall be directed to the Regional Administrator or Bureau Chief.

V. FORMS:

P&P 210-1 (A) Monthly Workload Report