

**CALIFORNIA DEPARTMENT OF CORRECTIONS AND REHABILITATION**

POSITION DUTY STATEMENT

PROPOSED

CURRENT

CDCR INSTITUTION OR HEADQUARTERS PROGRAM Calipatria State Prison - DAI		POSITION NUMBER (Agency-Unit-Class-Serial) 178-223-1155-001 thru 022		MCR / HCR 1/D
DIVISION / UNIT Business Services Inmate Case Records		CLASSIFICATION TITLE Case Records Technician		
		WORKING TITLE Case Records Technician		
		TIME BASE / TENURE P / FT	CBID R04	WWG 2
LOCATION Imperial County		INCUMBENT		EFFECTIVE DATE
<b>CDCR'S MISSION and VISION</b>				
<p><b>Mission</b> We enhance public safety through safe and secure incarceration of offenders, effective parole supervision, and rehabilitative strategies to successfully reintegrate offenders into our communities.</p> <p><b>Vision</b> We enhance public safety and promote successful community reintegration through education, treatment, and active participation in rehabilitative and restorative justice programs.</p>				
<b>COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION</b>				
The California Department of Corrections and Rehabilitation (CDCR) and California Correctional Health Care Services (CCHCS) are committed to building and fostering a diverse workplace. We believe cultural diversity, backgrounds, experiences, perspectives, and unique identities should be honored, valued, and supported. We believe all staff should be empowered. CDCR/CCHCS are proud to foster inclusion and representation at all levels of both Departments.				
<b>DIVISION OVERVIEW</b>				
Strive to enhance the safety and wellness of our staff, community and incarcerated persons for which we are responsible, while providing quality health care and meaningful rehabilitation.				
<b>GENERAL STATEMENT</b>				
Under the close supervision of the Supervising Case Records Technician (SCRT), the Case Records Technician (CRT) performs varied duties of complexity and difficulty relating to processing, maintaining and controlling inmate and parolee records; acts as a departmental liaison on case records related issues involving detailed, sensitive, and extensive interaction with State, City, County, private sector, law enforcement, and other agencies. Duties involve the intake, transfer, parole, and discharge processes to ensure State laws, rules, regulations, and departmental policies meet statutory requirements.				
<b>% of time performing duties</b>		Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.		
40%		Access inmate, parolee and discharged offender e-files and maintain integrity, accuracy and uniformity of e-files through the Electronic Records Management System (ERMS) and the Strategic Offender Management System (SOMS) database system. Follow e-files security and confidential procedures and policies. Ensure accurate data entry, prepare and review offender or parolee files. Recognize, sort and scan a multitude of documents according to Departmental policy and timeframes. Identify documents that need immediate action prior to scanning in the e-file. Ensure proper placement of scanned documents in the e-file. Identify, evaluate, interpret, type, copy, track, distribute, and or prepare a multitude of documents, actions, and/or dispositions including but not limited to departmental forms, reports; legal documents from courts or law enforcement; other state, federal or local agency documents and forms. Maintain Board of Parole Hearings actions and reports in database for inmate or parolee file.		
30%		Access, evaluate, enter, update, retrieve, and maintain accurate data and create or print reports for various Case Records processes utilizing ERMS, SOMS, Parole Violation Disposition Tracking System, Automated Transfer System, Live Scan, Lifer Scheduling and Tracking System, Business Information System, California Law Enforcement telecommunications System, and other applicable systems; type a variety of forms, documents, reports, letters, correspondence and discharge documentation.		
15%		Coordinate and interact in person and/or via telephone, facsimile, or written communication with a multitude of people, including, but not limited to, staff at all levels of the institution including contracted staff as well as state and local law enforcement agencies, inmate family members, victims and/or next of kin, courts, attorneys,		

Attorney General's Office, U.S. Immigration and Customs Enforcement, Department of Justice, Federal Bureau of Prisons, California Department of corrections and Rehabilitation Headquarters and field staff including Division of Adult Parole Operations, Board of Parole Hearings, and Division of Juvenile Justice; responsible to perform tasks associated with one or more functional areas of average to complex difficulty; lifer hearing calendars and schedules; parole revocation process and inmate transfers; disciplinary actions; intake; Pre-release; Parole and/or Discharge; Pre-registration, Registrations and Release Date notifications; Holds, Warrants, and Detainers including Extradition; Out-to-Court processing and follow-up.

10% Provide training to other departmental staff on ERMS scanning and other training as it relates to Case Records functions or as required; collect, review, distribute and process mail; provide back-up for other CRT functions; research, gather and assemble information for daily, weekly, monthly, quarterly, or yearly reports and special projects.

5% Coordinate gate clearances; schedule conference rooms for meetings; schedule C-File reviews and personnel related tasks; coordinate building maintenance issues; prepare contracts; track and/or purchase supplies; attend a minimum of 40 hours of In-Service Training annually.

**SPECIAL REQUIREMENTS**

- CDCR does not recognize hostages for bargaining purposes. CDCR has a "NO HOSTAGE" policy and all prison inmates, visitors, nonemployees and employees shall be made aware of this.

**NON-ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE, BUT ARE NOT LIMITED TO, THE FOLLOWING:** None noted.

**SUPERVISORY RESPONSIBILITIES:** None.

**QUALIFICATIONS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION and/or EXPERIENCE:** One year of experience performing clerical duties in the processing and maintaining of office records. (Experience in the California state service applied toward this requirement must have been acquired at a level of responsibility equivalent to an Assistant Clerk.)

**OR**

Two years of experience performing general clerical duties. and

Education: Either equivalent to completion of the 12th grade or completion of a business school curriculum.

**LANGUAGE SKILLS:** Ability to read and comprehend instructions and memoranda; spell correctly; use proper English; follow oral and written instructions; read and write English at a level required for successful job performance.

**MATHEMATICAL SKILLS:** Ability to add and subtract using whole numbers and common fractions.

**REASONING ABILITY:** Ability to apply common sense understanding to carry out instructions furnished in oral or written form; to evaluate situations and take effective action; to evaluate incoming paperwork according to an objective standard and ask questions as necessary to carry out work.

**CERTIFICATES, LICENSES, REGISTRATIONS:** None

**OTHER SKILLS AND ABILITIES:** Organize and pace workload to meet deadlines; handle questions and inquiries without exhibiting extreme responses; and maintain regular attendance and be punctual.

**OTHER QUALIFICATIONS/REQUIREMENTS:** Knowledge of routine office procedures. Ability to concentrate for long periods of time and perform repetitive work accurately.

**ADDITIONAL DESIRABLE QUALIFICATION:** Education equivalent to completion of twelfth grade.

**SPECIAL PERSONAL CHARACTERISTICS:** A demonstrated interest in assuming increasing responsibility.

**PHYSICAL DEMANDS:** The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The following is a definition of on-the-job time spent in physical activities:

Constantly: Involves 2/3 or more of a workday  
Frequently: Involves 1/3 to 2/3 of workday  
Occasionally: Involves 1/3 or less of workday  
N/A: Activity or condition is not applicable

**Standing:** Occasionally stand while, making photos, deliver mail or paperwork to other staff members and while talking to other employees.

**Walking:** Occasionally - walks to other areas of records to communicate with staff and distribute work.

**Sitting:** Constantly - sits while entering data into the computer, talking on the phone, and while performing essential duties. Sitting is intermittent with walking and standing.

**Lifting:** Occasionally lifts boxes weighing from 1 to 10 pounds.

**Carrying:** N/a.

**Stooping/Bending:** Occasionally - stoops/bends to reach documents stored on shelves or in cabinets. Slight bending at the waist and neck occurs on a frequent basis throughout the day.

**Reaching in Front of Body:** Occasionally reaches for files, materials on and in the desk, or when using the computer, or calculator.

**Reaching Overhead:** Occasionally - reaches overhead to retrieve files, or supplies from the top shelf of the supply room or file cabinet.

**Climbing:** n/a

**Balancing:** Rarely - balances when using the step stool.

**Pushing/Pulling:** Occasionally - pushes or pulls on desk drawers or file cabinets; **Crouching/Kneeling:** Occasionally - may crouch or kneel when accessing files or office supplies from lower shelves.

**Crawl:** N/A

**Fine Finger Dexterity:** Rarely - uses fine finger dexterity for sorting through miscellaneous papers/documents.

**Hand/Wrist Movement:** Occasionally - using a telephone, SOMS and ERM.

**Hearing/Speech/Sight:** Constantly - essential in all aspects of the job. For communicating with top management/employees/law enforcement agencies; for retrieving and reviewing central files, and talking with personnel.

**WORK ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. All office areas have florescent lighting, and thermostatically controlled, with linoleum covered flooring.

**MACHINES, TOOLS, EQUIPMENT, AND WORK-AIDS:** SOMS and ERMS computers, telephone, Fax machine, photocopier, and hole punch.

**COMMENTS:** Work hours are flexible, but usually 0730-1630 Monday through Friday.

Information for this job description was obtained by reviewing the California State Personnel Board Specification for the position and by observation of the duties as they are currently performed.

**CONSEQUENCE OF ERROR**

- Consequences of error may result in loss of time and could cause significant delays in program production. Such delays can result in inefficient use or misdirection of department resources resulting in the inability to meet efficiency and time line goals, and varying degrees of negative financial impacts to the department.

**To be reviewed and signed by the supervisor and employee:**

**EMPLOYEE'S STATEMENT:**

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT.

POSITION NUMBER (Agency – Unit – Class – Serial)  
178-223-1155-001 thru 022

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
<b>SUPERVISOR'S STATEMENT:</b> <ul style="list-style-type: none"><li>● <i>I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION</i></li><li>● <i>I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT.</i></li></ul>		
SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE

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