

CALIFORNIA DEPARTMENT OF CORRECTIONS AND REHABILITATION

POSITION DUTY STATEMENT

PROPOSED

CURRENT

CDCR INSTITUTION OR HEADQUARTERS PROGRAM Richard J. Donovan Correctional Facility		POSITION NUMBER (Agency-Unit-Class-Serial) 030-223-1155-005		
DIVISION / UNIT Associate Warden Operations Main Records		CLASSIFICATION TITLE Case Records Technician		
		WORKING TITLE Case Records Technician		
		TIME BASE / TENURE	CBID	WWG
LOCATION 480 Alta Road, San Diego, CA 92179		REVISION DATE 3/1/2026	INCUMBENT	EFFECTIVE DATE

CDCR'S MISSION and VISION

Mission
To facilitate the successful reintegration of the individuals in our care back to their communities equipped with the tools to be drug-free, healthy, and employable members of society by providing education, treatment, rehabilitative, and restorative justice programs, all in a safe and humane environment.

Vision
We enhance public safety and promote successful community reintegration through education, treatment, and active participation in rehabilitative and restorative justice programs.

COMMITMENT TO DIVERSITY, EQUITY, AND INCLUSION

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.

CDCR and CCHCS strive to collaborate with the community to enhance public safety and promote successful community reintegration through education, treatment and active participation in rehabilitative and restorative justice programs. Incumbents establish and maintain cooperative working relationships within the department, other governmental agencies, health care partners, and communities.

DIVISION OVERVIEW

BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS

Incumbents in this series are responsible for processing, maintaining, and controlling incarcerated individuals, youthful offenders, and parolee records. In accordance with State laws, rules, regulations, and departmental policies, incumbents respond to inquiries from departmental staff, Attorney General's Office, Board of Parole Hearings, Youth Authority Administrative Committee, law enforcement agencies, Federal and other state correctional departments, incarcerated individuals, youthful offenders, and parolees families, and public members requesting confidential information; enter incarcerated individuals, youthful offender, or parolee data in an automated system and ensure accurate data entry; assemble, prepare, and review incarcerated individuals, youthful offender, or parolee files; query a database for specific information on the location of an incarcerated individuals, youthful offender, or parolee; file a variety of documents in the incarcerated individuals, youthful offender, or parolee file including medical, psychiatric, dental, and related records, appeals, legal documents, Board of Parole Hearings, and Youth Authority Administrative Committee actions and reports; type a variety of forms and documents, reports, letters, correspondence, and discharge documentation; process packages for paroling incarcerated individuals or youthful offenders; prepare paperwork and schedules hearings; maintain incarcerated individuals, youthful offender, and parolee files; generate reports of data from an automated system or database; research, reconcile, and resolve information or database discrepancies; and process incoming mail for appropriate distribution to staff.

This is the entry, training, and full journey level for the series. Under close supervision, incumbents receive training in the technical work of processing, maintaining, and controlling incarcerated individuals, youthful offender, and parolee records; prepare routine documents and records information relating to an incarcerated individuals or youthful offenders classification, transfer, releases from, and return to a facility and other actions affecting legal status; assemble case records files; enter incarcerated individuals, youthful offender, and parolee data in an automated system; file various documents in incarcerated individuals, youthful offender,

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and parolee files; and answer inquiries from State, city, county, Federal, and private sector, law enforcement agencies, and departmental employees regarding incarcerated individuals, youthful offender, and parolee records.

GENERAL STATEMENT

BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

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 incarcerated individuals records and parolee records. As a departmental liaison on Case Records related issues, involving detailed, sensitive, and extensive interaction with State, City, County, and private sector, law enforcement and other agencies. Duties involve intake, transfer, parole, and discharge processes and in compliance with State laws, rules, regulations and departmental policies meeting statutory requirements.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE, BUT ARE NOT LIMITED TO, THE FOLLOWING (must be 50% of case records related tasks):

% of time performing duties	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 incarcerated individuals, supervised individuals, and discharged offender Central Files (C-File) maintain integrity, accuracy and uniformity of Central Files (C-Files) through the Electronic Records Management System (ERMS) and the Strategic Offender Management System (SOMS) database system. Follow C-File security and confidential procedures and policies. Ensure accurate data entry, prepare and review offender or supervised individuals 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 C-File. Ensure proper placement of scanned documents in the C-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. Maintain Board of Parole Hearings actions and reports in database for incarcerated individuals 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, incarcerated individuals 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, CDCR Headquarters and field staff including Division of Adult Parole Operations, Board of Parole Hearings, and Juvenile Justice. Responsible to perform tasks associated with one or more functional areas of average to complex; lifer hearing calendars and schedules; parole revocation process and incarcerated individual 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 to other CRT functions. Research, gather and assemble information for daily, weekly, monthly, quarterly, or yearly reports and special projects.
05%	Coordinate gate clearances, scheduling conference rooms for meetings, scheduling C-File reviews, personnel related tasks, coordinating building maintenance issues, preparing contracts, tracking and/or purchasing supplies. Attends 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 incarcerated population, visitors, non-employees, and employees shall be made aware of this.

CONSEQUENCE OF ERROR

- Consequences of error may result in a 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 timeline 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.*

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
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SUPERVISOR'S STATEMENT:

- *I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION*
- *I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT.*

SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
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