

CALIFORNIA DEPARTMENT OF CORRECTIONS AND REHABILITATION

POSITION DUTY STATEMENT

☐ PROPOSED

☒ CURRENT

CDCR INSTITUTION OR HEADQUARTERS PROGRAM California State Prison, Sacramento		POSITION NUMBER (Agency-Unit-Class-Serial) 284-223-1155-xxx		MCR / HCR 1 / D	
DIVISION / UNIT C Facility/Case Records		CLASSIFICATION TITLE Case Records Technician			
		WORKING TITLE			
		TIME BASE / TENURE FT	CBID R04	WWG 2	COI Yes ☐ No ☒
LOCATION Represa, CA 95671		INCUMBENT		EFFECTIVE DATE	
CDCR'S MISSION, VISION and COMMITMENT					
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 CDCR and CCHCS are committed to transforming the correctional landscape to create safer, more professional, and more fulfilling environments for our employees, the incarcerated population, and those supervised in our communities. Through systemwide improvements grounded in proven and emerging practices, we aim to strengthen rehabilitation, enhance workplace satisfaction, and support successful reentry into the community through our institutions, parole, and community partnerships. Our shared mission is to promote safety, wellness, and human dignity while fostering positive change for all those who live and work within our institutions and communities. CDCR and CCHCS are committed to building an inclusive respectful workplace. We are determined to attract and hire candidates from all communities and empower employees from a variety of backgrounds, perspectives, and personal experiences. We are proud to foster inclusion and drive collaborative efforts at all levels of the Department.					
DIVISION OVERVIEW					
GENERAL STATEMENT					
Under the direct supervision of the Supervising Case Records Technician (SCRT), CRT performs basic to complex duties related to, processing, maintaining, and controlling incarcerated people's records and carrying out Correctional Case Records functions. As a departmental liaison on Case Records related issues, the CRT position is involved in detailed, sensitive, and extensive interaction. The CRT plays a key role in intake, transfer, parole, and discharge processes and meeting statutory requirements.					
% 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 and track incarcerated people's Central Files (C-File) in the Electronic Records Management System (ERMS). Follow ERMS C-File security and confidentiality procedures and policies. Recognize, sort and file a multitude of documents according to Departmental policy and timeframes. This includes identifying documents that need action prior to scanning the ERMS C-File, proper placement of documents in their appropriate section and knowledge of which documents do not belong in the C-File. Identify, evaluate, interpret, type, copy, track, distribute, or prepare a multitude of documents, actions, and/or dispositions including but not limited to departmental forms and reports; legal documents from courts or law enforcement; other state, federal, or local agency documents and forms. Based on these documents, forms, or reports initiate or take appropriate action.			

20%	Access, evaluate, enter, update, retrieve, and maintain accurate data and create or print report for various Case Records process utilizing the Strategic Offender Management System (SOMS), ERMS, Automated Transfer System (ATS), Live Scan, California Law Enforcement Telecommunications System and other in-house systems.
10%	Coordinate and interact in person and/or via telephone, facsimile, or written communications 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, 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.
10%	Maintain responsibility and perform tasks associated with one or more functional areas of average to high complexity which could include but not be limited to: lifer hearing calendars and schedules; incarcerated transfers; disciplinary actions; pre-release, parole and/or discharge; registrations and release date notifications; Holds, Warrants, and Detainers including Extradition; Out to Court processing and follow-up.
5%	Collect, review, distribute, and process mail received by or sent from the Case Records office.
5%	Provide back-up to other CRT functions, provide training to other CRT as needed, and act as a lead of projects.
5%	Research, gather, and assemble information for daily weekly, monthly, quarterly, or yearly reports and special projects. Various duties as assigned which may include but are not limited to: coordinating gate clearances, coordinating and scheduling conference rooms, scheduling Central 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. Perform administrative duties including, but not limited to: adhere to Department policies, rules and procedures; submit administrative requests including leave, travel, and training in a timely and appropriate manner; accurately report time and submit timesheets by the due date.

SPECIAL PERSONAL CHARACTERISTICS

- Influence, change, and strengthen the community. Set an example each day through positive and pro-social role modeling, utilizing dynamic security concepts through observation and building rapport.
- Willingness to play a significant role in the collaborative efforts toward rehabilitation and public safety enhancement.
- Ability to facilitate conversations as a coach and mentor, engaging in a respectful and understanding manner.
- Ability to build trust, improve communication, and assist with the transformation of correctional culture.

SPECIAL REQUIREMENTS

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

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.*

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

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

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: **EITHER I:** 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 II:** Two years of experience performing general clerical duties. **and** 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

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 approximately 25 pounds and frequently lifts 1 to 10 pounds.

Carrying: Occasionally

Bending/Stooping: Occasionally – stops/bends to reach lower shelves or to reach documents stored on shelves or in cabinets. Slight bending at the waist and neck occurs on an occasional basis throughout the day.

Reaching in Front of Body: Frequently – reaches for materials on and in the desk or when using a computer or calculator.

Reaching Overhead: Occasionally - reaches overhead for supplies from the top shelf of the supply room or file cabinet.

Climbing: Occasionally

Balancing: Occasionally

Pushing/Pulling: Frequently - pushes and pulls on desk drawers or file cabinets; hand carts, or push carts.

Crouching/Kneeling: Occasionally - may crouch or kneel when accessing files or office supplies from lower shelves.

Crawling: N/A

Fine Finger Dexterity: Constantly – uses fine finger dexterity for sorting through miscellaneous papers/documents and use of computer systems.

Hand/Wrist Movement: Constantly – when typing, sorting and scanning documents into the ERMS C-file.

Hearing/Speech: Hearing enables use of the telephone and effective communication. Speech is useful in the training of new employees, during telephone conversations, and talking with personnel.

Sight: Necessary for computer work, issuing reports, and retrieving Central Files.

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.

MACHINES, TOOLS, EQUIPMENT, AND WORK-AIDS: SOMS and ERMS computer programs, telephone, Fax machine, photocopier, stapler and hole punch. Others as required.

COMMENTS: Work hours are flexible, but usually 8:00 am to 4:00 pm or 8:30 am to 4:30 pm, 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.