CALIFORNIA DEPARTMENT OF CORRECTIONS AND REHABILITATION

POSITION DUTY STATEMENT - General

☐ PROPOSED

☒ CURRENT

CDCR INSTITUTION OR HEADQUARTERS PROGRAM	POSITION NUMBER (Agency-Unit-Class-Serial)			MCR / HCR
CALIFORNIA CORRECTIONAL INSTITUTION	054-223-1155-XXX			1/D
DIVISION / UNIT	CLASSIFICATION TITLE			
	CASE RECORDS TECHNICIAN			
	WORKING TITLE			
ADULT INSTITUTIONS/REGION IV	Case Records Technician			
	TIME BASE / TENURE	CBID	WWG	COI
		R04	2	Yes ☐ No ☒
LOCATION	INCUMBENT		EFFECTIVE DATE	
TEHACHAPI			10/1/2026	

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

The Region IV mission provides safe and secure housing for maximum to minimum custody incarcerated persons, while:

1. Providing opportunities for these incarcerated persons to successfully transition to lower levels of custody, by accepting personal responsibility for their actions through behavior-based multi-level programming; and
2. Providing opportunities for rehabilitation through participation in work, vocational and academic programs, substance abuse treatment, and self-help programs.

GENERAL STATEMENT

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 person and parolee records. Act

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 intake, transfer, parole, and discharge processes and are in compliance with State laws, rules, regulations and departmental policies 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 incarcerated person, parolee and discharged offender Central Files (C-File) and 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 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 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, 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 incarcerated persons or parolee file. Video conference scheduler, responsible for scheduling court hearings, BPH, attorney, litigation, internal affairs, attorney general, visit assessments, parole suitability hearings. Maintain calendar on sharepoint, ducat appointments, publish weekly and monthly logs. 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.
35 %	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 person 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; incarcerated person transfers; disciplinary actions; Intake.
15%	Access, evaluate, enter, update, retrieve, and maintain accurate data and create or print reports for various Case Records processes utilizing ERMS, SOMS, Automated Transfer System, Live Scan, California Law Enforcement Telecommunications System, and other applicable systems. Type a variety of forms, documents, reports, letters, correspondence and discharge documentation. Coordinate gate clearances.
5%	Provide training 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. 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.
5%	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. Other duties as required.

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.

Knowledge and Abilities:

Knowledge of: Modern office supplies, equipment, and procedures; grammar, spelling, punctuation, and modern English usage; and arithmetic.

Ability to: Interpret written and numerical data; use personal computer/microcomputer systems and software applications in the performance of technical work; accurately enter data into a computerized database; learn and understand a broad range of technical data and apply it to individual cases; perform technical tasks in the correctional case record keeping process; file case records files and maintain a filing system; communicate effectively; perform mathematical computations; apply laws, rules, and regulations; interpret and use reference material; follow instructions; use tact and good judgment in dealing with fellow employees, the public, and other governmental entities; and operate office machines.

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: Constantly - stands while pulling and refiling files, while assisting at the Central File checkout counter, photocopying, and while talking to other employees.
Walking: Constantly - walks to other areas of records to communicate with staff and distribute work.
Sitting: Occasionally - sits while entering data into the computer, talking on the phone, and while performing essential duties. Sitting is intermittent with walking and standing.
Lifting: Frequently - lifts boxes of central files weighing approximately 32 pounds and frequently lifts 1 to 10 pounds.
Carrying: Frequently - carries above noted files from a few feet to approximately 25 yards
Stooping/Bending: Occasionally - stoops/bends to reach files on lower shelves, or 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: Frequently - reaches for files, materials on and in the desk, or when using the computer, or calculator.
Reaching Overhead: Frequently - reaches overhead to retrieve files, or supplies from the top shelf of the supply room or file cabinet.
Climbing: Occasionally - climbs when using the step stool to reach files or forms, and steps throughout the institution during performance of regular work responsibilities.
Balancing: Occasionally - balances when using the step stool.
Pushing/Pulling: Frequently - pushes or pulls on desk drawers or file cabinets; hand carts loaded with boxes of central files, or push carts full of central files.
Crouching/Kneeling: Frequently - may crouch or kneel when accessing files or office supplies from lower shelves.
Crawl: N/A
Fine Finger Dexterity: Constantly - uses fine finger dexterity for sorting through miscellaneous papers/documents, central files, and typing on the computer.
Hand/Wrist Movement: Constantly - when pulling or refiling central files, using a telephone, and for sorting and filing in the central file.
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: Computer, telephone, fax machine, photocopier, and hole punch.

COMMENTS: Work hours are flexible, but usually 8:00-4:00, Monday through Friday. 9/8/80 is available, and the work hours are 7:30–4:30, with alternate Fridays off. On working Friday's work hours are 8:00-4:00. RDO's are S/S/H. 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.

SPECIAL REQUIREMENTS

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

054-223-1155-XXX

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