

## EDITED TASK LISTING

**CLASSIFICATION:**                     **CASE RECORDS TECHNICIAN**                    

**NOTE:** *Each position within this classification may perform some or all of these tasks.*

<b>Task Statements</b>	
1.	Process inmate, youthful offender and parolee records to ensure documents are scanned into the Electronic Records Management System (ERMS) to appropriate sections utilizing office procedures in accordance with Departmental policy.
2.	Maintain inmate, youthful offender and parolee records to update files (i.e., electronic files and hard copies) and ensure accuracy utilizing document management systems; [i.e., Electronic Records Management System (ERMS) and Strategic Offender Management System (SOMS)] in accordance with Departmental policy.
3.	Control inmate, youthful offender and parolee records to maintain safety and security utilizing a computer tracking system in accordance with office procedures.
4.	Respond to requests from other departmental staff, (e.g., Attorney General's Office, Board of Parole Hearings, and other government entities, etc.), and public members to provide information utilizing ERMS and SOMS in accordance with Departmental policy, as needed.
5.	Input inmate, youthful offender or parolee data to create accurate reports utilizing SOMS in accordance with Departmental policy.
6.	Assemble inmate, youthful offender or parolee files to begin the initial process manually or electronically by utilizing court documents, finger print cards, computer reports (i.e., California Law Enforcement Telecommunication System (CLETS) report), and California Department of Corrections and Rehabilitation (CDCR) forms in accordance with Departmental policy.
7.	Query a database to gather specific information on an inmate, youthful offender or parolee in accordance with Departmental policy utilizing automated systems as needed.
8.	Scan a variety of documents pertaining to the maintenance and control of inmate, youthful offender or parolee records to ensure current and accurate information in accordance with Departmental policy and/or office procedures.
9.	Type/prepare a variety of forms, documents and correspondence to communicate and/or request information to local law enforcement, internal staff, etc. utilizing computers and typing skills in accordance with Departmental policy and/or office procedures.
10.	Type/prepare a variety of forms, documents and reports for processing inmate, youthful offender, parolee records utilizing computers and typing skill in accordance with Departmental policy.
11.	Request inmate, youthful offender and parolee records from appropriate source (e.g., law enforcement agencies, courts, departmental staff, etc.) to gather information for requesting staff utilizing appropriate forms, computers, and communication skills as needed.
12.	Maintain integrity and uniformity of the inmate, youthful offender and parolee records standardized filing/scanning system within the File Room utilizing automated/manual systems in accordance with security and confidentiality procedures and policies at all times.
13.	Sort/recognize a multitude of documents in order to identify action needed prior to placement in the inmate, youthful offender or parolee records in accordance with Departmental policy/office procedures.
14.	File documents in the appropriate inmate, youthful offender or parolee record section to maintain accurate and current information utilizing automated/manual systems and organizational skills in accordance with Departmental policy/office procedures.
15.	Identify a multitude of documents, and/or dispositions in order to take appropriate actions to accurately process inmate, youthful offender or parolee records utilizing working knowledge of record processes in accordance with Departmental policy/office procedures.
16.	Prepare for scheduled hearings to ensure the Board of Parole Hearings (BPH), Juvenile Parole Board (JPB), and court appearances meet mandated timeframes utilizing automated scheduling systems in accordance with Departmental policy.
17.	Schedule conference rooms in order to coordinate meetings, hearings, utilizing automated/manual scheduling in accordance with institutional policy/office procedures.

*Tasks highlighted in bold text are not currently on the SPB classification specification*

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<b>Task Statements</b>	
18.	Schedule inmate, youthful offender and parolee records reviews to comply with requests from other law enforcement agencies, departmental staff and public members utilizing automated/manual systems in accordance with Departmental policy as requested.
19.	Utilize in-house automated systems in order to ensure transportation to the proper facilities/courts in accordance with Departmental policy.
20.	Track hearing processes to ensure the Board of Parole Hearings (BPH), Juvenile Parole Board (JPB), and court appearances meet mandated timeframes utilizing automated/manual tracking systems in accordance with Departmental policy.
21.	Distribute a multitude of documents, actions, and/or dispositions in order to ensure the receipt by the appropriate areas utilizing working knowledge of record processes in accordance with Departmental policy/office procedures.
22.	Copy/scan a multitude of documents, actions, and/or dispositions in order to distribute information to appropriate areas and process documents accurately utilizing working knowledge of record processes in accordance with Departmental policy/office procedures.
23.	Purge inmate, youthful offender and parolee records information to ensure there are no duplicate copies, eliminate unnecessary documents, and minimize impact to the Records Office utilizing working knowledge of record processes in accordance with Departmental policy/office procedure as needed.
24.	Scan inmate, youthful offender and parolee records in the Electronic Records Management System (ERMS) to ensure quality assurance with security and confidentiality in accordance with Departmental policy/office procedure as needed.
25.	Generate reports to provide information to appropriate areas for proper release of inmates/youthful offenders/parolees utilizing SOMS in accordance with Departmental policy.
26.	Research information in various databases [e.g., ERMS, SOMS, Board Information Technology System (BITS), etc.] to resolve discrepancies in accordance with Departmental policy utilizing automated systems as needed.
27.	Utilize in-house automated systems to ensure proper release and transfer of inmates/youthful offenders utilizing various systems (e.g., Automated Transfer System, Live Scan, CLETS and SOMS) in accordance with Departmental policy.
28.	Research information for reports and special projects in order to assemble a cohesive mass of information utilizing research techniques/materials and automated systems (i.e., SOMS) as needed.
29.	Process incoming mail to appropriately distribute to staff utilizing automated/manual systems in accordance with Departmental policy.
30.	<b>Observe and report any inappropriate conduct of inmates or youthful offenders to ensure safety and security of the institution/facility utilizing reporting techniques in accordance with Departmental policy/office procedure as needed.</b>
31.	<b>Interact in person, and/or via telephone, facsimile, or written communication with stakeholders in order to provide or receive information utilizing verbal and written communication skills in accordance with Departmental policy.</b>
32.	<b>Provide back-up to other Case Records Technicians (CRTs) to eliminate/minimize backlog in accordance with Departmental policy utilizing current desk procedures and cross training as necessary.</b>
33.	<b>Provide training to other CRTs utilizing current desk procedures in accordance with Institutional policy on an ongoing basis.</b>
34.	<b>Lead special projects to provide technical oversight and input for management utilizing automated tracking systems, leadership experience, and communication skills in accordance with Departmental policy as needed.</b>

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35.	<b>Generate gate clearance requests for visitors (e.g. attorneys, witnesses, stakeholders, etc.) in order to ensure the safety and security of the institution utilizing standard institutional policy as needed.</b>
36.	<b>Report repairs in order to ensure functional equipment utilizing telephones, forms, verbal communication, automated/manual tracking system and computers in accordance with Institutional policy as needed.</b>
37.	<b>Order supplies for the office to ensure there is sufficient supplies/equipment utilizing standard bidding practices and manual tracking systems in accordance with Institutional policy on a monthly basis or as needed.</b>
38.	<b>Track supply inventory for the office to ensure there is sufficient supplies/equipment utilizing standard bidding practices and manual tracking systems in accordance with Institutional policy on a monthly basis or as needed.</b>