

## EDITED TASK LISTING

### CLASSIFICATION: CORRECTIONAL CASE RECORDS ADMINISTRATOR

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

| Task Statements |   |
|-----------------|---|
| 1.              | Conduct field audits of the Case Records operations to ensure compliance with departmental procedures, regulations and statues utilizing Departmental Compliance Review Tool on an as need basis.   |
| 2.              | Interpret and apply appropriate laws related to the processing, maintenance, and control of inmate, parolee and discharge offender records utilizing rules, regulations, administrative policies and procedures within the departmental records system for sentence accuracy on a daily basis.        |
| 3.              | Plan and coordinate departmental record-keeping policies and procedures in collaboration with other departmental units to ensure uniformity utilizing personal knowledge, laws, Departmental policies/regulations, etc. on an as needed basis.  |
| 4.              | Plan and coordinate training-and-development programs for staff pertaining to case records policies and procedures in order to develop uniformity utilizing laws, Departmental policies/regulations etc. on an as needed basis.   |
| 5.              | Act as an administrative and technical consultant to departmental staff, other governmental agencies, court officers, etc., to provide technical information related to the statewide Case Records systems utilizing departmental resources under pertinent laws and administrative standards.        |
| 6.              | Act as a liaison between headquarters and local administrators to provide information and assistance related to Case Records functions, systems operations and management utilizing personal knowledge and work experience on an as needed basis.   |
| 7.              | Oversee (directly or indirectly) the work of Case Records staff to ensure compliance utilizing departmental policies, procedures and expectations on a daily basis.   |
| 8.              | <b>Provide written or verbal responses to inmate and public inquiries regarding Case Records related matters using applicable laws and administrative standards as required.</b>  |
| 9.              | <b>Analyze and research legal issues to ensure departmental compliance with laws, regulations, policies, etc. utilizing available legal resources in accordance with management direction.</b>  |
| 10.             | <b>Calculate inmate and parolee release and discharge dates to ensure compliance with sentencing laws utilizing Strategic Offender Management Systems (SOMS) and other resources (e.g. calculation sheets, release date calculator program and instructional memorandums, etc.) on a daily basis.</b> |
| 11.             | <b>Certify departmental legal documents as requested by local, state and federal agencies to comply with state and federal guidelines utilizing departmental policies and procedures as required by law.</b>  |
| 12.             | <b>Identify current and future case records needs to ensure adequate resources utilizing tracking systems, surveys and reports under the direction of the Chief of Case Records Services.</b>   |

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

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| 13.             | Provide guidance to Case Records staff on Board of Parole Hearing's (BPH's) policies and procedures, and implementation of BPH's decisions in order to maintain accuracy, consistency and functionality within Case Records operations utilizing BPH's regulations and decisions, laws, etc. on a daily basis. |
| 14.             | Assist field Case Records staff with complex/sensitive cases involving the preparation of forms for transfer, extradition, parole, and discharge of offenders under jurisdiction of the Department as required by law and departmental procedures.   |
| 15.             | Provide guidance to field Case Records offices to ensure compliance with legal mandates (e.g., notifications, registrations, court-ordered testing requirements, etc.) utilizing court orders, laws, and departmental policies, etc. on an as needed basis.  |
| 16.             | Identify inmate's appropriate credit earning status to ensure compliance utilizing sentencing laws, court orders, and departmental policies, etc., as required.  |
| 17.             | Collaborate with field Case Records staff to ensure inmates/parolees are appropriately committed to CDCR pursuant to sentencing laws including the Public Safety Realignment, as required.   |
| 18.             | Operate personal computers and access databases (e.g. SOMS, Electronic Records Management System [ERMS], Board Information Technology System [BITS], etc.) to perform tasks (e.g., research, provide training, create reports, electronic communication, etc.) on a daily basis.                               |
| 19.             | Plan and implement advanced technological systems for Case Records operations to ensure greater efficiency and standardization utilizing laws, policies and regulations under the direction of the Chief of Case Records Services.   |
| 20.             | Coordinate and develop Departmental Case Records policies and procedures to ensure uniformity utilizing personal knowledge, laws, Departmental policies/regulations, etc. on an as needed basis.   |
| 21.             | Develop training material for appropriate staff pertaining to Case Records related policies and procedures in order to implement uniformity and knowledgeable staff utilizing laws, Departmental policies/regulations, etc. on a regular basis.  |
| 22.             | Represent the Department as a subject matter expert and custodian of records, in formal or informal settings (e.g., legal proceedings, hearings, meetings, conferences, etc.) utilizing departmental records, Case Records knowledge, etc., as needed.   |
| 23.             | Review individual central files to ensure compliance with laws, policies and regulations utilizing SOMS and ERMS as requested by various departments (e.g. executive management, Attorney General's Office, Inspector General's Office, etc.) as needed.   |

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| 24.             | Participate in the employee corrective/discipline process (e.g., verbal/written counseling, Letter of Instruction, adverse action, etc.) to improve employee performance or address substandard performance utilizing resources (e.g., Memorandum of Understanding [MOU], California Department of Human Resources [CalHR] rules, Departmental policies/regulations, etc.) on an as needed basis. |
| 25.             | Facilitate the hiring process by participating in interviews of potential candidates to fill identified vacant position(s) utilizing effective communication skills, various state and Departmental hiring forms in accordance with the Departmental hiring policies and procedures, CalHR rules, etc. on an as needed basis.   |
| 26.             | Evaluate the performance of Case Records staff to comply with standard employment policies and ensure efficiency by reviewing completion of assigned duties, Individual Development Plan (IDP) recognizing special achievement/awards, etc. on an as needed basis.  |
| 27.             | Oversee Case Records staff attendance to ensure accuracy in reporting time usage utilizing basic supervision/managerial skills, MOUs, laws, rules and regulations, etc. on a daily basis.   |
| 28.             | Monitor the workplace and ensure compliance with the Equal Employment Opportunity (EEO) policy to promote a work environment free of discrimination using state and federal laws, as required.  |
| 29.             | Prepare written documents (e.g., policies/procedures, correspondence, regulation changes, Budget Change Proposals [BCPs], etc.) for the Department in order to provide information to CDCR staff, outside agencies, offenders, and the public utilizing effective written communication skills, staff expertise, research, etc. as required.  |
| 30.             | Act as Subject Matter Experts for the Department in meetings/committees/task forces in order to plan, develop and implement policies and procedures utilizing effective communication skills and staff expertise, as directed by the Chief of Case Records Services on a regular basis.   |
| 31.             | Act as Subject Matter Expert for the department in order to assist with the development of job analyses utilizing professionalism, personal expertise and case records knowledge on an as needed basis.   |
| 32.             | Assume the responsibilities of Case Records operations for the Chief in his/her absence in order to respond to urgent situations, maintain communication with executive staff, organize and direct a variety of staff in resolving the critical issues utilizing decision making skills, effective communication, established policies and procedures, etc. on an as needed basis.                |
| 33.             | Maintain confidentiality of personnel matters, budget change proposals, sensitive case information, etc. to maintain the safety and security of offenders, staff and public as mandated by state and departmental policies on a daily basis.  |

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| 34.                    | <b>Evaluate case factors to determine early or late releases and provide findings to chief of case records utilizing ERMS, SOMS and release date calculation per case records policy.</b>   |
| 35.                    | <b>Authorize the issuance of an early release warrant in order to return offenders to CDCR custody utilizing SOMS on an ongoing basis.</b>  |
| 36.                    | <b>Prepare statistical reports for executive staff by gathering information from databases and/or entities (e.g. SOMS, Offender Information Services, Parole Violation Disposition Tracking System, BITS, etc.) in order to provide insight on case records workload, new departmental programs and legislation impact on an ongoing basis.</b> |
| 37.                    | <b>Analyze proposed legislation for impact to case records in order to provide written analysis to the Office of Legislation utilizing your expertise in case records operations on an as needed basis.</b>   |