

Contact Entries

606.1 PURPOSE AND SCOPE

The purpose of this policy is to set forth guidelines and procedures for establishing a record of case contacts in the client management system (CMS). This policy applies to all designated personnel.

606.2 AUTHORITY AND REFERENCES

- California Penal Code § 7521 (c).

606.3 POLICY

A chronological record of contacts made by personnel shall be entered within the CMS, regarding all probation-related matters, on a continuing and timely basis. Entries shall be reviewed by the unit supervisor in accordance with Policy 624 Case Audit.

606.4 PROCEDURE

- (a) Whenever an action is taken or information is received regarding a probation-related matter, a record shall be entered into the CMS. Should there be additional employees involved, the following would apply:
- (b) Each involved employee will enter a separate record in the CMS documenting their observations in one of the following events:
 - An enforcement act, including but not limited to drug testing, searches, and/or arrests.
 - An allegation is made regarding the physical or emotional safety of a client, victim, personnel, or member of the community.
- (c) All contacts shall be recorded the same day of their occurrence, when possible. If the contact is unable to be recorded the same day, it shall be entered by the end of the next business day.
- (d) As with any record, contacts are subject to examination by the court or as allowed under the law. The entries shall be concise as well as professional in manner and content. Personnel should refrain from using abbreviations and acronyms, as they can be vague and easily misinterpreted. While opinions and observations may be valid and pertinent, they shall be distinguished from facts.
- (e) Information indicating that an adult/youth is working as a confidential informant or has any of the following communicable diseases: AIDS, Hepatitis B or C shall not be entered into the CMS.
- (f) Personnel's performance should not be addressed in CMS contacts. Content relative to results of a case audit, details of a complaint or any personnel-related matters shall not be included in CMS.

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606.5 CONTACT ENTRIES

Throughout a client's period under the department's supervision, various entries will be completed, including but not limited to:

- Case Summaries
- Initial Interviews
- Case Plan Contacts
- Assessments Contacts
- Field Contacts
- Transfer Summaries
- Pre-Supervision Contacts
- Investigative Contacts
- Telephone Contacts
- Mail Contacts
- Collateral Contacts
- Electronic Contacts
- Victim Contacts

Within all of these, personnel should include the following, when applicable:

- (a) Comments concerning the original offense, case assessment considerations, and possible methods of intervention;
- (b) Development and review of case plan with the adult, or youth and their parent/legal guardian;
- (c) A description of the adult/youth's demeanor as perceived by personnel;
- (d) Verification that the conditions of supervision have been reviewed and explained;
- (e) Instructions given as to future reporting, meeting financial or other special obligations;
- (f) Criminal history of adult/youth, family members, and associates;
- (g) Potential officer safety concerns (animals, weapons, etc.);
- (h) Progress in meeting case plan tasks and objectives, as well as compliance with conditions of supervision;
- (i) Changes in school status, employment, address, phone number, health, etc.;
- (j) Changes in supervision level;
- (k) Referrals to other agencies or community resources;
- (l) Relevant information regarding an adult or youth, which may impact their performance on supervision;

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- (m) Collateral contacts should include a summary of received information, as well as name, date, contact information, relationship to the client, agency, etc.;
- (n) When closing a case, a brief statement shall be made as to type and date of termination.

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