

**SAN BERNARDINO COUNTY
PROBATION DEPARTMENT PROCEDURE**

Caseload Explorer Documentation

Authority:

Michelle Scray Brown, Chief Probation Officer

Purpose:

To establish guidelines for entry of documentation into Caseload Explorer (CE).

Definitions:

Caseload Explorer (CE): A computerized case management system used by the department for documentation of various supervision areas as it pertains to Adult, Juvenile, and Institutional activities.

Responsibilities:

I. All Employees:

- A. Shall ensure all documentation is completed in CE by the end of their assigned shift.
- B. If more restrictive or specific documentation criteria exist, entries into CE shall be done in accordance with those identified criteria.

Guidelines:

- A. In accordance with best practice and to maximize officer safety, all staff should attempt to enter CE documentation in real time. As practicable, telephone contacts, home visits, field contacts, client and collateral interactions, behavioral notes, log notes, activities, searches, etc. should be entered as soon as possible after the actual event, but no later than the end of the assigned shift.

Inspections:

Refer to the Policy and Procedure Inspection Matrix.

Issued by:

 9-14-20
Michelle Scray Brown, Chief Probation Office Date

Original Issue Date:

September 14, 2020