**INTEGRATED CASE MANAGEMENT SYSTEM (ICMS) –
AUTOMATED AND MANUAL LOGBOOK**

AUTHORITY: Administrative Directive

RESCINDS: Procedure Manual Item **3-11-002**, dated **08/18/23**

FORMS: Special Incident Report   Automated- ICMS

PURPOSE: To establish a procedure for documentation for all activities in the facility.

I.   GENERAL INFORMATION

      A.   The Automated Logbooks are a permanent record of the day-to-day operation of each facility. They also serve as a means of passing information concerning special **challenges**, special instructions, and the youth's **demeanor** and behavior. Automated Logbooks are legal documents that may be subpoenaed into court.

      B.   When the automated logbook cannot be used due to technical/electrical issues in a facility, staff will resort to the manual logbook until which time the automated logbook is back online. The manual logbook is a legal document subject to the **Public Records Act** and **subpoena**.

      C.   Youth are not allowed access to read them, nor are they to have excerpts read to them.

      D.   Entries are to be made in a professional manner with correct spelling and grammar. Express ideas in a clear and logical manner. State the premises from which conclusions are drawn. <u>Avoid editorializing</u>.

II.   PROCEDURE

      A.   AUTOMATED LOGBOOKS/ICMS:

            1.   Log on to ICMS by opening Microsoft Edge

            2.   From the PROB-NET home page, select ICMS.

            3.   Once on the ICMS web page, enter your ICMS username and password.

            4.   Move the cursor over the **Facilities** Tab and click on the Unit Activities on the drop-down list.

            5.   Click the Sign In or Sign Out button to log in or out of a shift. If it is a Late or a Manual Entry, click the appropriate button. The system will set the staff field to the current username and the type of entry IN or OUT, accordingly.

The Automated Logbook will generate the time and date that you sign in/out of the unit.

All staff reporting for their shift or leaving their shift must make a log entry which includes the following in the "notes" section:

a.   The shift hours scheduled to work.

b.   Equipment check.

c.   Equipment issued: Key Set #, and Pak-Set # if applicable.

d.   Population counts.

Example: 6a-2p, EQ check complete, keys# **, **Pak-Set #**, Pop at **.

6.   When leaving a unit, staff will make an automated log entry reflecting their reason for leaving/destination. The exact time of return will also be logged.

7.   The staff member working at the desk will keep the logs up-to-date and make automated log entries at the time of their occurrence.

8.   Automated logbooks will utilize black for regular log entries, red for incoming population adjustments and codes, green for outgoing population adjustments, and blue for court and youth's rights.

9.   During each structure, and as needed throughout the day, staff will inform the youth that staff of the opposite gender may enter the unit at any given time. Staff will advise the youth to be fully clothed at all times and to position themselves for modesty when changing their clothes or when tending to personal needs (i.e., turn away from the window when using their toilet room). A notation of this instruction and the name of the staff member giving the instruction will be entered into the unit log.

10.   Safety checks must be completed and logged into the Automated Logbook at varied and random intervals, not to exceed 15 minutes**.** Conduct direct visual observation of each youth and log at least every 15 minutes. If specific youth must be checked more frequently, make these entries as needed.

11.   Record all disciplinary actions and consequences under the **Roster – Status tab**. **To add new notes**, select the youth's name and the original entry, **then click the 'Add Notes' tab. Once completed, mark them as complete by checking the 'Off' box."**

12.   Record all Special Incident Reports (SIR) in the Automated Log – Unit Activities Type: SIR. Attach the name of **all youth** involved in the **incident** and **provide sufficient detail to inform the next shift.** In the note**,** list the names of **any** Deputy **Probation** Correctional Officers (**DPCO**) who will be **submitting** an SIR **for** the incident.

13.   Record all court entries into the Automated Logbook. Include the case disposition in the "notes" section and note any future court dates.

14.   Daily mail distribution must be documented in the Logbook.

15.   Document room inspection and room searches. For room inspection failures, include the room number as well as the results.

16.   Document **issued** and resolved grievance forms. Include the youth's name, staff issuing the grievance, grievance number **(If applicable)**, and reason/resolution of the grievance.

17.   Document all drills in the Logbook**, including** staff who conducted **them.**

18.   Document all unit programs and include the number of youths participating. Use the "End Log Activities" tab to end programs for an accurate duration of program time.

19.   Document that all youth have had the opportunity to use the phone.

20.   Record Large Muscle Exercise (LME) and include the activity and where the activity is taking place (softball field, SRA-3, etc.) and the number of youths participating. If a youth declines LME, list the youth's name in the Automated Logbook and note that they declined. The time LME concludes must also be logged.

21.   Unit Movements – Transfers and room assignments are to be documented in the Automated Log at the time the room assignment/transfer is completed. This entry is completed under **"Roster – Facility Mgmt"** by clicking on the youth's name and dragging **it** to the room/bed **where** the youth is being housed.

22.   Anytime a youth assigned to the unit is not physically in the unit/facility due to a field trip, temporary release (TR), etc., they are to be listed in ICMS as a plus **one. In** the "Notes" section make an entry as to the whereabouts of the youth, (i.e. Anaheim Global.) When the youth returns, they will come off the plus pop.

23.   When the Automated Logbook system is down, **utilize the** manual logbook. Once the Automated/ICMS system is back online, the manual logbook entries will be **entered** into ICMS using the manual entry button under the activities menu. If not **entered** by the day **DPCO,** it is the responsibility of the night **DPCO** to ensure **the entry is** completed.

24.   Any time a youth is in their room while other youths are out, it must be documented in the Room Confinement Tab. This includes when youth are voluntarily choosing to decline an activity, a meal, or school. See PMI 3-5-014 regarding Room Confinement for more information.

25.   The Automated Logbook will be stored indefinitely on the server. Forty-eight hours of Automated Logbook information will be available in the Full View category. **Additional** data can be retrieved **by clicking** the **"Search"** button and removing the checkmark from **"Yesterday/Today"** or **"Dates"** and **entering** the desired dates.

B.   MANUAL LOGBOOKS:

1.　　Make all entries in <u>black</u> ink. Exceptions will be addressed further in this Manual Item.

2.　　<u>Do not erase, white out or otherwise change entries</u>. If mistakes are made, draw a single line through the material to be deleted. Write "error" and your initials above the last word deleted before proceeding.

3.　　The person making the entry will legibly initial all entries. Keep the log up-to-date and log entries at the time of occurrence.

4.　　Begin each page on the <u>top</u> line and fill each page all the way to the bottom line. Do not leave any lines blank. Use all pages before starting a new log.

5.　　Under no circumstances leave blank lines to be filled in later. Make all entries in chronological order for effective record-keeping. Put each entry on a separate line.

6.　　Sign-in and sign out of the unit.

　　　All staff reporting for their shift or leaving their shift must make a log entry, which includes:

　　　a.　　The exact time, as indicated on the unit's clock.

　　　b.　　Full name (first and last).

　　　c.　　The shift hours scheduled to work/ actually worked.

　　　d.　　The date: month, day, year.

　　　e.　　Equipment check.

　　　f.　　Equipment issued: Key set #, Pak-Set # (if applicable)

　　　g.　　Population counts.

　　　　　Example: 5:59 a.m. John Jones 6a-2p 12/23/XX eq check ok, keys#Q2, OC, handcuffs pop. 20

7.　　At midnight each day, print the new day's date in the center of the next blank line in <u>red ink</u>. Lines are to be ruled all the way across the page immediately above and below the entry.

　　　　　　Saturday, January 26, 20XX

8.　　Special notices (emergencies/announcements must be surrounded on all four sides by a line and titled "Note."

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9.   Make a log entry of all Special Incident Reports, which includes the <u>full name</u> of each youth involved and enough information so that the next shift is sufficiently aware of the incident. Write "S.I.R." in the margin and block in the note using red ink.

10.   Safety checks.

     a.   Safety checks must be completed and logged into the manual logbook at varied and random intervals, not to exceed 15 minutes. Conduct direct visual observation of each youth and log at least every 15 minutes. If specific youth must be checked more frequently, make these entries as needed.

     b.   After each room check, make logbook entries as follows and initial once completed:

12:30 a.m. saf. ck. J.J.   12:45 a.m. saf. ck. J.J.

1:27 a.m. saf. ck. J.J.   1:41 a.m. saf. ck. J.J.

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     c.   If specific youth must be checked more frequently, make the entry as follows: (Special status)

12:30 a.m. Safety check on youth ***** J.J.

12:44 a.m Safety check rooms #4 and #10 J.J.

12:56 a.m. Safety check J.J.

11.   Use of red, green, and blue felt pens.

     a.   When a youth is received in the unit, log the youth's full legal name in <u>red ink</u>, with the time and adjusted population. When a youth is released or transferred from the unit, log the youth's full name and destination in <u>green ink</u>, with the time and adjusted population.

     b.   "Plus" population:

Anytime a youth assigned to the unit is not physically in the unit due to a field trip, temporary release (TR), etc.

Example:

Hospital runs are recorded in the log as a plus population.

(1)   Make the entry in green ink, and include the youth's name, destination, and the plus population.

      Examples:

9:30 a.m. John Smith to Anaheim Global with **DPCO** John Jones

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      pop. 28 + 1 **Anaheim Global** (green ink) J.J.

9:45 a.m. John Doe out on TR to doctor. J.J.

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(2)   When the youth returns, make an entry red ink. Include the youth's name, "returned from," the adjusted population count, and staff's initials.

Examples:

10:30 a.m. John Smith returned from Anaheim Global w/ **DPCO** John Jones

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      pop. 28 + 1 TR (red ink) J.J.

10:45 a.m. John Doe returned from temporary release

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      pop. 29 (red ink) J.J.

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(3)   Enter court log entries and block in blue ink. Include the time, youth's full name, and (once learned) the case disposition.

Examples:

8:45 a.m.   Court: Disposition (blue felt pen)

John Doe   Released

John Smith	Trial 12/10/XX
John Jones	Plcmt, 15-day review 12/3/XX

John Brown	Pretrial, 12/19/XX

12. Large Muscle Exercise (LME) must include the time activities start/finish, a brief explanation of the activity, and the staff initials in unit log entries.

Example:

3:00 p.m. 20 youth/2 staff outside to softball field J.J.

13. When a youth leaves the unit (but not the facility), make log entries (i.e., when a youth goes to the Medical Unit, on-site counseling). Make such log entries in black ink. Include the time, the youth's name, destination, and the staff's initials.

Example:

0715 John Jones to control for after court visit. J.J.

14. Document the youth's name in blue ink when mail is distributed.

15. Document room/locker inspection in blue ink as well as the rooms/lockers inspected and the results of the inspection.

16. Document **issued** and resolved grievance forms in blue ink. Include the youth's name, staff issuing the grievance, grievance number, **if applicable**, and reason/resolution of the grievance.

17. Document all drills in red ink.

18. Document all unit programs in blue ink and include the number of youths participating. Document that all youth have had the opportunity to use the phone.

19. Document medical sheets reviewed in blue ink.

20. Every time a youth is sent to their room, and subsequently comes out of their room for any type of room confinement, a log entry should be made.

21. Record all action resulting in room confinement, regardless of the length of time in the logbook with the youth's name underlined in red. If a youth has been placed on Restrictive Status, underline the youth's name in red and the timeframe.

22.   Log group-counseling sessions as a "Note," and include a brief summary of the meeting.

23.   The day and evening shifts should include a brief shift summary describing the activities of the day, the unit **tone**, any areas of anticipated **issues** that may arise out of the day's events, results of CEGU consultations, behavioral problems and successes, incentives distributed, phase level changes, and any other significant **information.** Block the entry in black ink, and title it "SHIFT SUMMARY."

24.   As Manual Logbooks are completed, the Supervising **Probation** Correctional Officer **(SPCO)** will ensure they are placed in storage located in the warehouse. New logbooks may be obtained from the Supplies Clerk. On new Manual Logbooks, **clearly label the unit and usage dates on both the** front cover and spine.

REFERENCES:

Procedures:	3-2-001	Facility Security
	3-2-008	Accounting of Youth Assigned to Juvenile Hall
	3-5-002	Releases
	3-5-013	Separation
	3-8-013	Temporary Release and Furlough Procedures
	3-8-014	Facility Field Trips
	3-10-003	Deterrence of Unacceptable Behavior
	3-12-005	Medical Temporary Release
	3-15- **001**	Special Incident Reports/Routing SIR and DHO Paperwork
Policies:	A-1	Policy, Procedure and the Law
	B-3	Case File Management and Security
	G-3	Building Security and Safety

S. Rivera

APPROVED BY: