

**ADULT INDOCTRINATION  
GENERAL AND MANDATORY SUPERVISION**

- AUTHORITY:** Administrative Directive  
California Penal Code Sections 1170, 1203, 1203.1, 1203.2, 1203.3,  
1203.10, 1203.12, 186.30, 290, and 457.1  
California Health and Safety Code Section 11590
- RESCINDS:** Procedure Manual Item 2-3-011, dated 05/16/18
- FORMS:**
- |  |                         |
|--|-------------------------|
| Instructions for Supervision   | (Automated/Word)        |
| Defendant's Waiver of Appearance   | (Automated/Word)        |
| EBP Summary Grant -  | (F057-2072)             |
| Initial Risk Needs Assessment  | (Automated Risks/Needs) |
| Modification Petition Nonappearance, Adult   | (Automated/Word)        |
| Authorization for Release of Medical, Dental,<br>Psychiatric, or Psychological Information | (Automated/Word)        |
- PURPOSE:** To provide adults placed under General and Mandatory supervision with a uniform and specific set of instructions regarding their responsibilities to the Court and probation officer.

**I. GENERAL INFORMATION**

**A. Purpose of Indoctrination**

1. To explain thoroughly and accurately the content of the court Minute Order and the terms and conditions of supervision to the offender (formally referred to as a "probationer," under general supervision, and a "defendant," under mandatory supervision).
2. To inform the offender of the supervision process and the role of the probation officer.

**B. Scheduling Indoctrination Interviews**

Resident Probation Officers instruct new offenders to report to the area office that supervises the city the offender lives in for indoctrination (EXCEPTIONS: 1203.9 PC/Courtesy Supervision cases and those cases identified for review or assigned to Special Supervision).

**II. PROCEDURE**

**A. Indoctrination**

1. The indoctrination is to be completed during the initial contact with the offender (unless case dynamics prohibit this; if not the initial contact, it is to be completed as soon as reasonable).

2. Re-indoctrination upon transfer of case. The newly assigned officer shall re-indoctrinate the **offender** within 15 days of receipt of case.

B. Certified Pleas (TAHL), Minute Orders, and Terms & Conditions of Supervision

1. If the offender was summarily granted probation supervision or sentenced pursuant to 1170(h) PC, subsequent to a negotiated plea, the assigned DPO shall review both the minute order and plea agreement documents (TAHL) to ensure the orders and terms and conditions are consistent and there are no discrepancies prior to indoctrination.
2. If there are discrepancies or errors, the DPO shall seek clarification, via the chain of command, and coordinate with the Court as appropriate for additional clarification and/or correction.
3. Any subsequent changes or corrections will be shared and clarified with the offender, as appropriate.

C. Court Minute Order

1. Review with the offender.
2. Obtain the offender's signature on file copy of order.
3. Give a copy of the court order to the offender.

D. Instructions for Supervision (Automated/Word)

1. In addition to the usual terms and conditions, indicate any additional specific instructions such as search & seizure, counseling, financial and restitution, use no unauthorized drugs, drug testing, etc.
2. Review instructions with the **offender**.
3. Have the offender initial each applicable line.
4. Obtain the offender's electronic signature (or wet, as appropriate); retain copy in the probation file.
5. Give a copy of the instructions to the offender.
6. Advise/refer the offender to the Collection Officer regarding the payment of fines, restitution, cost of probation, and/or other financial information, etc.
7. Advise the offender of registration requirements per, 290 PC, 186.30 PC and 457.1 PC, as needed.
8. Verify DNA and collect DNA, if felony conviction and DNA were not yet collected.

E. CABS / PICS Photo

Accompany offender to CABS/PICS photo machine. Prior to taking offender's picture, verify that the information in the CABS/PICS photo machine pertains to the offender. Take picture of the offender and any visible tattoos, as appropriate.

F. EBP Summary Grant -Information Work Sheet

1. The receptionist will give the offender the EBP Summary Grant - Information form for him/her to complete at the initial reporting.
2. The assigned probation officer will review the form with the offender, making necessary corrections and clarifications of responses, including residence, employment, family and criminal history, substance abuse, etc.
3. This form contains questions related to the offender's substance abuse and other criminal history, which is not available from any other source but the offender.

G. Medical Release (Automated/Word)

Typically, the offender is given an Authorization for Release of Information form to sign at his/her indoctrination in order for the probation officer to obtain any necessary information with the offender's written consent. Generally, a release is program specific and tailored to the referral(s) provided by the probation officer.

- H. Obtain personal documents from offender (e.g., CDL or CID; Social Security card; 290 PC registration; proof of employment, residence, etc).
- I. Give offender clear instructions as to what they need to accomplish or complete in order to be in compliance with court orders (e.g., enrollment in counseling / treatment, community service; etc.). Provide offender with the appropriate referrals.
- J. Give offender a business card, schedule and document their next appointment in ECR, if necessary.

**REFERENCES:**

Procedures:	2-1-104 2-3-004	Chronological History Sheet - Adult Adult Modification Petition
Policies:	E-4 E-7 E-12	Clients with Legal Residence Outside of Orange County Restitution Resolving Problems in Probationer's Employment Status

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**APPROVED BY:**