



Early Learning Coalition OF PINELLAS COUNTY

DEPARTMENT:
Eligibility

SUBJECT: Procedures for “**How to Enter a Case Note**”

REVISED: 9-21

AUTHORIZATION APPROVAL: Manager, Family Services

1. At the top of the EV record, click Add Note.

The screenshot shows the 'Eligibility Verification' interface for an active case (EV_0001970493). The 'Add Note' button is highlighted with a red circle. The main content area displays 'Household at a Glance...' with details for children (Jane Doe III, Jane Doe, Jill Doe), parents (Nancy Test Brenda TEST), and household income calculations (Total annual gross income: \$19,651.00).

2. Enter Case Note:
 - a. **Description:** Miscellaneous
 - b. **Custom Code Type:** Parent
 - c. **Custom Code:** Choose from list. Refer to History Code on “EFS History Transaction Codes”.
 - d. **Note:** Refer to Minimal History Notation and Guidelines on “EFS History Transaction Codes”.
 - e. Save.

The 'Add Case Note' form shows the following fields:

- Description:** Miscellaneous
- Custom Code Type:** Parent
- Custom Code:** REDETERMINATION
- Note:** BGS-ECON for Jill Doe, no fee change, FT 1,20 PT .80, sig 1/1/XX-12/31/xx, client will sign payment card for client and provider records.

The 'Save' and 'Cancel' buttons are visible at the bottom right.

Note: The information listed in these guidelines are not all inclusive and staff are responsible for ensuring that all applicable rules, policies and procedures are adhered to in the execution of their duties and responsibilities as it relates to their position. These guidelines can be modified and exceptions may be made upon justification within program policy and with management approval. This procedure will be reviewed periodically or as needed for updates or revisions as approved by management.

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