



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.

Eligibility Verification Active EV_0000576495

Counselor Change Household Status Case Notes Add Note

Household at a Glance HH_0000009150

Children Needing Care jane doe II (child, female, age 8) JANE DOE (child, female, age 4) jill doe (child, female, age 2) Total Household Size: 4	Parents Nancy Test brenda TEST (adult, female)	Other Household Members	Total Household Income Calculations Employment income: \$19,651.00 Alimony and child support income: \$0.00 Other income: \$0.00 Alimony and child support deductions: \$0.00 Total annual gross income: \$19,651.00
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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.

Add Case Note

Description*
Miscellaneous

Custom Code Type
Parent

Custom Code
REDETERMINATION

Note
BG8-ECON for Jill Doe, no fee change, FT 1.20 PT .60, elg 1/1/XX-12/31/xx, client will sign payment cert for client and provider records.]

Save Cancel

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.

Revised 09-21