

**Rick Scott**  
GOVERNOR



**Jesse Panuccio**  
EXECUTIVE DIRECTOR

## MEMORANDUM

**DATE:** October 18, 2013  
**TO:** Regional Workforce Board Executive Directors  
**FROM:** Lois A. Scott, Chief, Bureau of One-Stop and Program Support  
**SUBJECT:** Changes to and Deletion of Service Codes, Activity Codes and Case Notes

Monitoring staff conduct preliminary reviews of information prior to commencing onsite monitoring reviews. This includes the review of and print screens of specific activity to be monitored. During the most recent monitoring season, staff detected several instances where activity or service codes were present during the preliminary review; however, in some instances, the codes were no longer visible in the Employ Florida Marketplace (EFM) system when staff arrived onsite. Additionally, staff noticed changes and deletions of TABE dates and scores without an accompanying case note to explain the actions.

To maintain an accurate, historic audit trail of actions taken on cases, deletion of service and activity codes and case notes is prohibited. Staff should address corrections as follows:

1. Staff should void rather than delete an activity or service code that is entered in error. Staff should case-note the reason for voiding the activity.
2. If staff wishes to correct a case note entry, staff should enter a new case note stating that it is an update to a previous one rather than delete or edit the original case note. Staff is only allowed to edit/correct a case note within three business days of its creation.

Should you have additional questions or concerns regarding this memorandum, please contact Christa Nelson at (850) 245-7492 or [christa.nelson@deo.myflorida.com](mailto:christa.nelson@deo.myflorida.com).

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cc: Tom Clendenning  
Michael Lynch  
Telly Buckles  
Isabelle Potts