

## NOTICE OF INSTRUCTION

West Central Florida  
Area Agency on Aging, Inc.



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#1202211 – Electronic Record Documentation– kp

TO: All Case Management Lead Agencies/PSA 6  
FROM: Katie Parkinson, Director of Program Management  
DATE: December 2, 2011  
SUBJECT: Electronic Record Documentation

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The purpose of this Notice of Instruction is to provide WCFAAA's lead agency providers with guidance about electronic records and electronic signatures. Specifically, this notice is intended to address utilization of electronic signatures for case management records.

The following language is anticipated to be amended into WCFAAA provider contracts:

“The WCFAAA authorizes, but does not require, the Contractor to create and retain electronic records and to use electronic signatures to conduct transactions necessary to carry out the terms of this Agreement. A contractor that creates and retains electronic records and uses electronic signatures to conduct transactions shall comply with the requirements contained in the *Uniform Electronic Transaction Act*, s. 668.50, Fla. Stat. All electronic records:

1. Must be fully auditable;
2. Are subject to *Florida's Public Records Law*, ch. 119, Fla. Stat.;
3. Must comply with WCFAAA Master Agreement section 28, *Data Integrity and Safeguarding Information*;
4. Must maintain all confidentiality, as applicable; and,

5. Must be retained and maintained by the Contractor to the same extent as non-electronic records are retained and maintained as required by the Master Agreement.

Upon request by the WCFAAA, the Contractor shall provide the WCFAAA with non-electronic (paper) copies of records. Non-electronic (paper) copies provided to the WCFAAA of any document that was originally in electronic form with an electronic signature must indicate the person and the person's capacity who electronically signed the document on any non-electronic copy of the document."

This instruction may be utilized upon receipt of this notice. Should you have questions, please contact this writer at 813-676-5577 or [Parkinsonk@elderaffairs.org](mailto:Parkinsonk@elderaffairs.org).