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Electronic Death Registration System (EDRS)

User Guide:

Funeral Homes

8/21/2019

EDRS Quick Reference Sheets for Funeral Homes

This User Guide is comprised of the following Quick Reference Sheets (QRSs). A checkmark is displayed in the User Type columns for each QRS applicable to your role. Your functionality within EDRS is limited to actions for those QRSs checked. Use of another user's login credentials to access other functionality is strictly prohibited and a violation of the User Agreement and Confidentiality Policy.

QRS Number	QRS Name	User Type	
		Funeral Director	Funeral Home Staff
QRS-2000	Finding a Death Case Someone Else Started	✓	✓
QRS-2001	Creating a New Death Case: Personal Information	✓	✓
QRS-2002	Verifying the Social Security Number	✓	✓
QRS-2003	Signing a Death Case	✓	
QRS-2005	Entering *Other* as Place of Death	✓	✓
QRS-2009	Validating a Death Case	✓	✓
QRS-2010	Requesting Medical Certification	✓	✓
QRS-2015	Printing a Working Copy (Noncertified)	✓	✓
QRS-2016	Dropping a Death Case to Paper	✓	✓
QRS-2017	Abandoning a Death Case	✓	✓
QRS-2018	Removing an Abandoned Case Status	✓	✓
QRS-2022-FH	Amending a Death Case: Personal	✓	
QRS-2024	Editing an Amendment Request	✓	
QRS-2033-FH	Transferring a Death Case from a Funeral Home to Another Campus	✓	✓
QRS-2034	Viewing the Processing History of an Amendment	✓	
QRS-2047	Relinquishing a Case	✓	✓
QRS-2049	Selecting a Local Registrar	✓	✓
QRS-2051	Unsigning a Death Case	✓	
QRS-2052	Adding Comments	✓	✓
QRS-2055	Printing a Disposition Permit	✓	✓
QRS-2056-FH	Using Fast Links and Queues	✓	✓
QRS-2057	Entering an Alias	✓	✓

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Finding a Death Case Someone Else Started

1

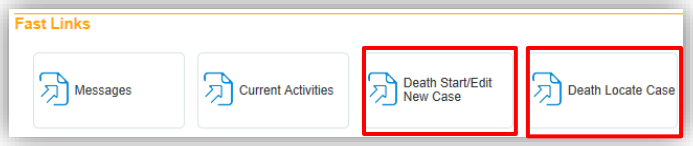
Determine which search method you need to use.

If the case was started by another facility, you must use the **Death Start/Edit New Case** search because this case is new (not associated) to you and your facility.

If the case was started by (associated with) your facility, use the **Death Locate Case** search.

2

Begin your search by clicking the **Death Start/Edit New Case** link or the **Locate Case** link on your Home page.



3

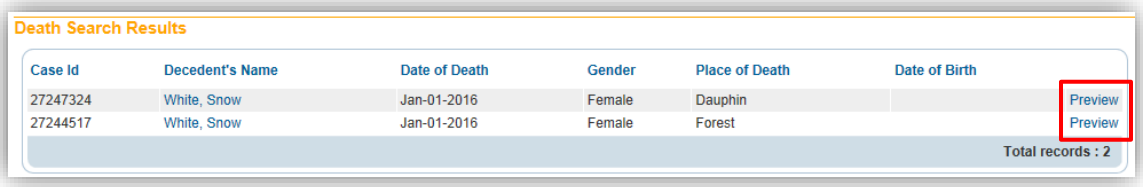
Enter the required data and click the **Search** button.

Start/Edit New Case search: You must enter the **Decedent's Name**, **Date of Death** and **Gender** EXACTLY as the other facility entered it because it is looking for an exact match. If you cannot find the case, try the search again using a different spelling or contact the other facility to confirm how the data was entered.

Locate Case search: If you cannot locate the case, your facility might not have ownership yet. Try using the **Start/Edit New Case** search.

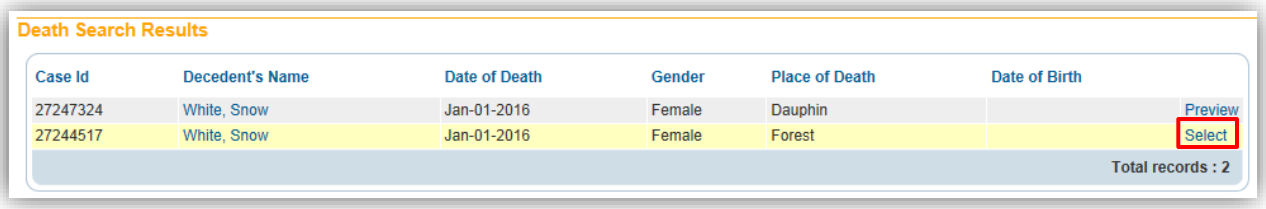
4

If one or more results display, you can click the **Preview** link to view additional case information to help you determine if this is the case you are looking for.



5

If you find the case you need, click the **Decedent Name** link or the **Select** link to open the case.



If you do not find the case you need, contact the person/facility who started the case to confirm how the name, date of death and gender was entered. Then search again using that confirmed information. If that does not work, go to the **Death Start/Edit New Case** search and click the **Start New Case** button to create a new case.

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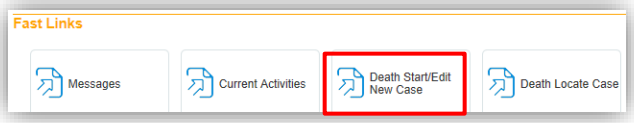
Creating A New Death Case: Personal Information

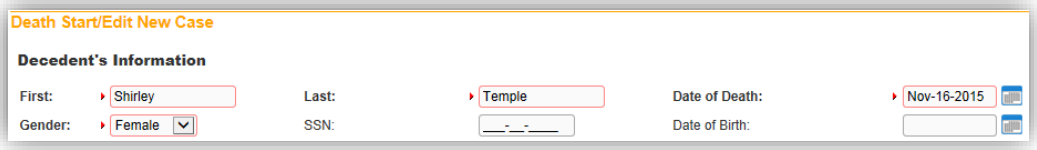
Note: To avoid duplication of cases, before you create a new case you must perform a **Death Start/Edit New Case** search to determine if the case was already started by another party.

1. Click the **Death Start/Edit New Case** link on your Home page to search for existing cases that match the one on which you are working.



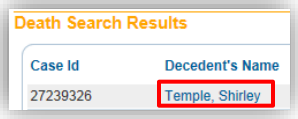
Note: The **Death Locate Case** search is only used to locate cases you have already started.

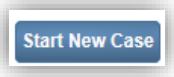
2. Enter the required data and click the **Search** button.



3. <u>If you find a matching case</u>, click the **Decedent's Name** link to open the case.

   <u>If you cannot not find any matching cases</u> click the **Start New Case** button.

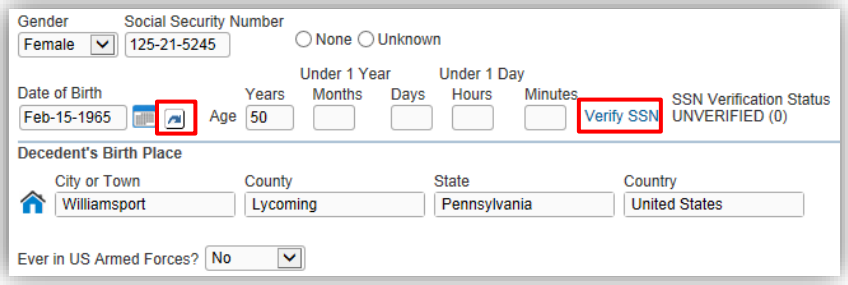




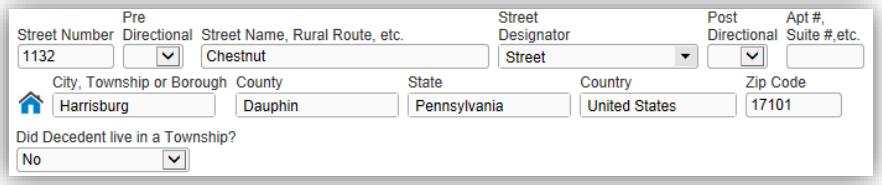
Note: If you know the case was started but cannot find it, ask exactly how this data was entered and search again.

4. Decedent screen:
   - Enter the required data
   - Click to calculate the **Age**
   - Verify the SSN
   - Click the **Next** button

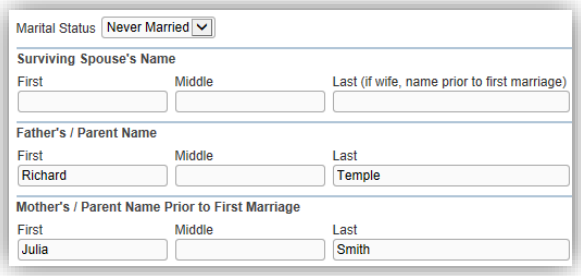
Note: For detailed information on the SSN validation process, reference **QRS-2002, Verifying the Social Security Number**.



5. Resident Address screen:
   - Enter the required data
   - Click the **Next** button



6. Family Member's screen:
   - Enter the required data
   - Click the **Next** button



7

Informant screen:

- Enter the required data
- Click the **Next** button

First: Barbara | Middle: | Last: Temple | Suffix:

Relationship to Decedent: Sister | Other specify:

Address

Street Number: 222 | Pre Directional: | Street Name or PO Box, Rural Route, etc: West | Street Designator: Avenue | Post Directional:

City or Town: Harrisburg | State: Pennsylvania | Country: United States | Zip Code: 17101

8

Disposition screen:

- Enter the required data
- Use the to select the FD (if not displaying)
- Use the to select the Filing Registrar Office
- Click the **Next** button

IMPORTANT: You must use the **Lookup** search ( ) to locate/select the funeral director information. Manually entering this information will generate an error that will prevent the funeral director from signing the case.

Note: For detailed information on entering the local registrar information, reference **QRS-2049, Selecting a Local Registrar**.

Method of disposition: Burial | Other Specify:

Date of Disposition: Nov-23-2015

Did Medical Examiner/Coroner approve Cremation Clearance/Medical Donation? No

Cremation Clearance Authorized By:

First: | Middle: | Last:

Place of disposition

Place of Disposition: Eternal Rest Funeral Home

City or Town: Harrisburg | State: Pennsylvania | Country: United States

Funeral Director

License Number: FD082015L

First: Gomez | Middle: | Last: Addams | Suffix:

Funeral Home

Business Registration Number: | Lookup: Eternal Rest Funeral Home

Street Number: 159 | Pre Directional: | Street Name or PO Box, Rural Route, etc.: Eternal | Street Designator: Drive | Post Directional:

City or Town: Harrisburg | State: Pennsylvania | Country: United States | Zip Code: 17110

Filing Registrar

Filing Registrar Office: White, Betty: 99-999

Registrar

First: Betty | Middle: | Last: White

9

Decedent Attributes screen:

- Enter the required data
- Click the **Save** button

Decedent's Occupation: Actress | Decedent's Industry: Movie Industry

Decedent's Education: Bachelor's degree (e.g. BA, AB, BS)

Ancestry

Decedent of Hispanic Origin?: No, not Spanish/Hispanic/Latino | Other Hispanic, Specify:

Decedent's Race

What race did decedent consider himself to be?(More than one race can be indicated)

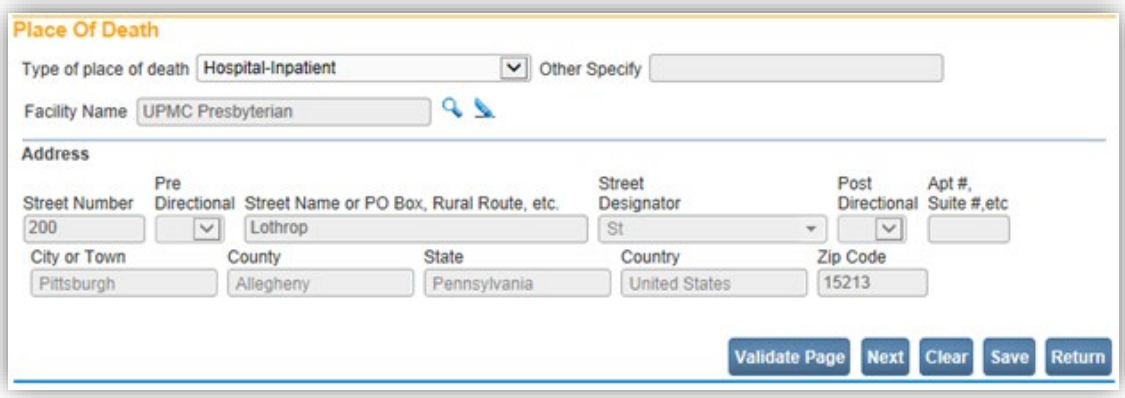
- [x] White
- [ ] Black or African American
- [ ] American Indian or Alaska Native
- [ ] Asian Indian
- [ ] Chinese
- [ ] Filipino
- [ ] Japanese
- [ ] Korean
- [ ] Vietnamese
- [ ] Other Asian
- [ ] Native Hawaiian
- [ ] Guamanian or Chamorro
- [ ] Samoan
- [ ] Other Pacific Islander
- [ ] Other(Specify)
- [ ] Don't know/Not Sure
- [ ] Refused

Single Race Self Designation?: White | Other (Specify):

10

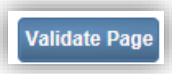
Place of Death screen:

- Select the **Type of Place of Death**
- Use the to select the **Facility Name**
- Click the **Save** button
- If the facility does not appear in the lookup, email the facility name and address to RA-DHDeathSupport@pa.gov



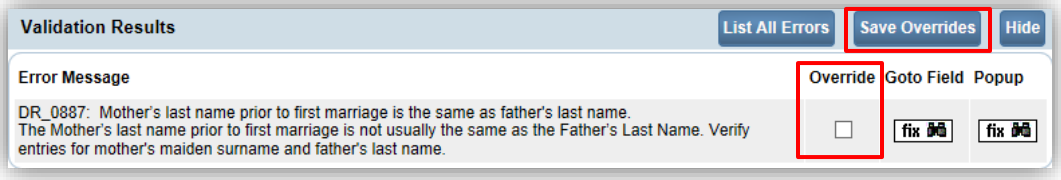
11

Click the **Validate Page** button to validate all of the data entered.



12

If needed, correct or override validation errors and re-validate.



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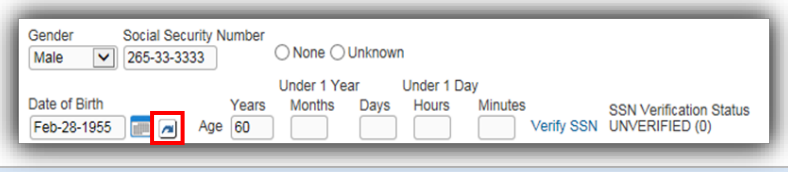
Verifying the Social Security Number

1

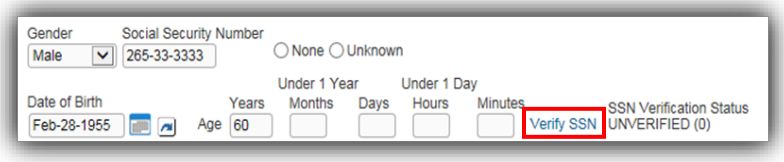
The following information must be completed before attempting to verify the SSN:

- **First** and **Last Name**
- **Gender**
- **Social Security Number**
- **Date of Birth**
- Click to calculate the **Age**



2

Click the **Verify SSN** link.



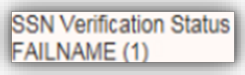
3

The **SSN Verification Status** is set to *Pending*.

Click the **Save** button to update the **SSN Verification Status**.

4

If the information does not match, the **SSN Verification Status** displays the reason for the failure and the number of attempts.



In this example, the verification failed because it could not find a match for the name, and this was the first verification attempt.

You have up to five attempts to verify the SSN, and these are possible failure codes:

- *FAILSSN*
- *FAILNAME*
- *FAILDOB*
- *FAILGENDER*

If the verification failed, review the **SSN**, **Name**, **Date of Birth** and **Gender** fields to determine if this data was entered correctly in DAVE™. If the data was entered correctly, you may need to contact the informant or decedent's family to determine which piece of data is incorrect.

If the verification passed, skip to **Step #6**.

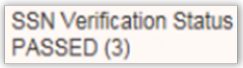
5

The **Verify SSN** link becomes disabled after each verification attempt. To activate the **Verify SSN** link again, you must change data in one or more of the required fields (**SSN**, **Name**, **Date of Birth** or **Gender**).

Change **SSN**, **Name**, **Date of Birth** or **Gender** and click the **Verify SSN** link.

6

When the information matches, the **SSN Verification Status** changes to *Passed* and the number of attempts is displayed. You have completed the SSN verification process.



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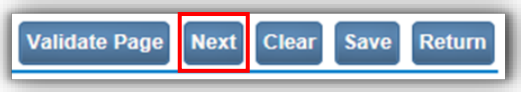
Signing a Death Case

Notes:

- This Quick Reference Sheet is for the role of a Funeral Director only. This functionality is not for use by funeral home staff. Use of another user's login credentials to perform this functionality is strictly prohibited and a violation of the User Agreement and Confidentiality Policy.

1. From the death case, review and verify the information on the Decedent screen.

2. Click the **Next** button to review and verify the information on the Resident Address screen.



3. Click the **Next** button to review and verify the information on the Family Members screen.

4. Click the **Next** button to review and verify the information on the Informant screen.

5. Click the **Next** button to review and verify the information on the Disposition screen.

6. Click the **Next** button to review and verify the information on the Decedent Attributes screen.

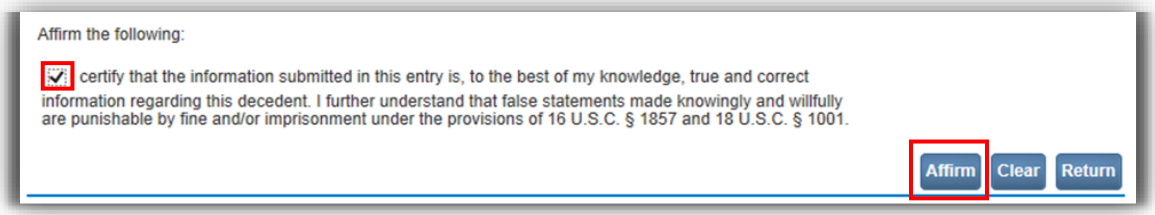
7. Click the **Next** button, and the Pronouncement screen will display. Data on this screen can only be edited by a medical certifier, so click the **Next** button to review and verify the information on the Place of Death screen.

   Note: This step is only for hybrid fax attestation cases. If a medical certifier has completed the Place of Death screen, this step can be skipped.

8. Click the **Sign** link on the Death Registration Menu to review the Affirmations screen.

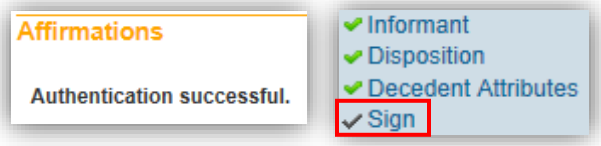
   IMPORTANT: The **Sign** link only displays when all of the personal information has been validated. If you are a funeral director and the **Sign** link is not displaying, click the **Validate Page**

9. Select the **Affirm** checkbox and click the **Affirm** button to sign the case.



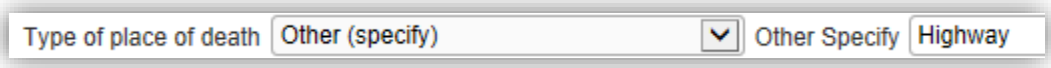
Signing a Death Case

10 When the case is affirmed, a confirmation message displays and the **Sign** link has a checkmark next to it.



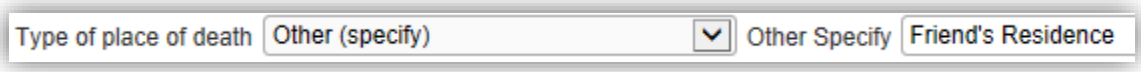
Entering *Other* as Place of Death

1 From the Place of Death screen select **Other (specify)** from the **Type of place of death** drop-down list, then complete the rest of the fields as follows:



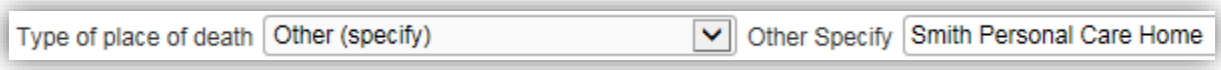
If the death occurred on a highway, select **Other (specify)**.

- Enter **Highway** in the **Other Specify** field.
- Enter as much of the **Street Address** as is available.
- The **City**, **County**, **State**, **Country** and **Zip Code** must be entered.
- **Do not** enter "scene."



If the death occurred in a residence other than the decedent's home, select **Other (specify)**.

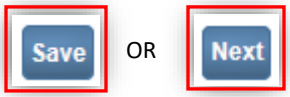
- Enter a description of the residence in the **Other Specify** field, such as **Friend's Residence**.
- Enter the full address including **Street Address**, **City**, **County**, **State**, **Country** and **Zip Code**.



If the death occurred in a personal care home, select **Other (specify)**.

- Enter the name of the personal care home such as **Smith Personal Care Home** in the **Other Specify** field.
- Enter the full address including **Street Address**, **City**, **County**, **State**, **Country** and **Zip Code**.

2 Click the **Save** or **Next** button to continue.



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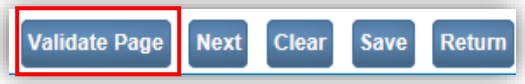
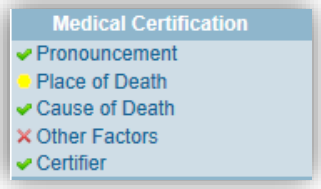
Validating a Death Case

1 When all of the data has been entered for your section of the death case, click the **Validate Page** button to initiate the validation process.



2 The Death Registration Menu indicates the status of each screen by displaying red, yellow, or green symbols.

- **Red** X indicates validation errors that must be corrected.
- **Yellow** circle indicates validation errors that must be overridden or corrected.
- **Green** checkmark indicates no validation errors.



View the error message(s) at the bottom of each screen with a red or yellow symbol for instructions to correct or override each issue.

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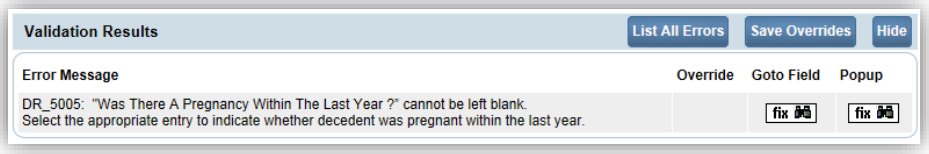


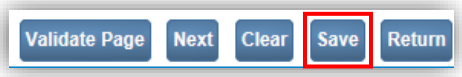
3 If an error can be overridden, determine if the data is correct.

- If it is **not** correct, correct the data and click the **Save** button.

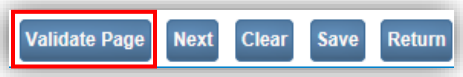
- If it **is** correct, select the **Override** checkbox for that error message and click the **Save Overrides** button.

Note: After a yellow error is overridden, the validation symbol will always remain yellow.
But as long as the override was successful, it will not prevent the case from being signed or certified.

4 When corrections are made, click the **Save** button to save your change(s) before navigating to any other screen.

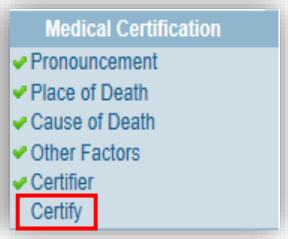


5 When all changes are complete, click the **Validate Page** button to run the system validation rules again.



6 When all information is valid and/or overridden, the menu will display all green (or green and yellow) symbols indicating that the case is ready to be signed or certified.

If you are a funeral director or medical certifier, the **Sign** or **Certify** link will appear on the Death Registration Menu.



IMPORTANT: Support staff will never see the **Sign** or **Certify** links, even when a case is completely validated.

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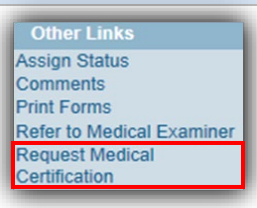
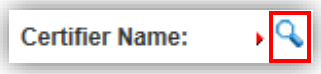
Requesting Medical Certification

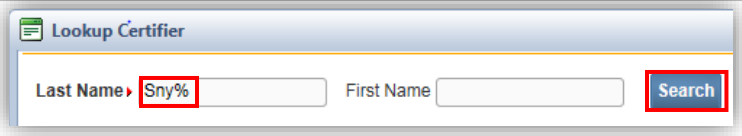
1. From the death case, click the **Request Medical Certification** link on the *Other Links* section of the Death Registration Menu.



2. Click the **Lookup** icon to search for the **Certifier's Name**.

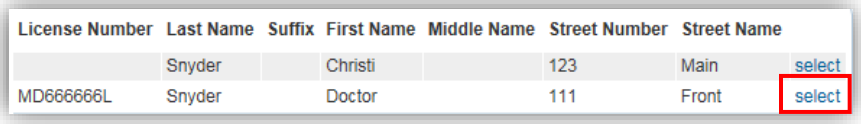


3. Search for the **Certifier's Name**.



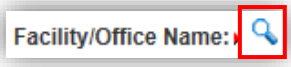
Tip: If you are having difficulty finding the certifier you need, enter a few letters of the certifier's **Last Name** followed by the Wildcard symbol (**%**). **Example:** Sny%

4. Select the **Certifier's Name**.

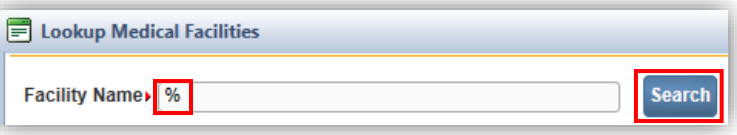


License Number	Last Name	Suffix	First Name	Middle Name	Street Number	Street Name	
	Snyder		Christi		123	Main	select
MD666666L	Snyder		Doctor		111	Front	select

5. Click the **Lookup** icon to search and select the **Facility/Office Name**.

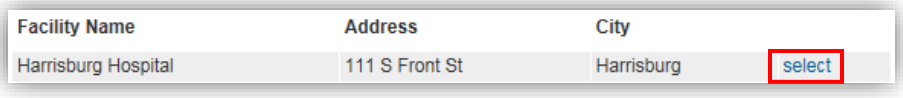


6. Search for the **Facility/Office Name**.



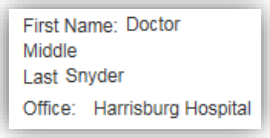
Tip: Entering just the Wildcard symbol (**%**) will display all facilities that the selected certifier is associated with.

7. Select the **Certifier's Name**.



Facility Name	Address	City	
Harrisburg Hospital	111 S Front St	Harrisburg	select

8. The selected certifier and facility display below the **Lookup** icons.



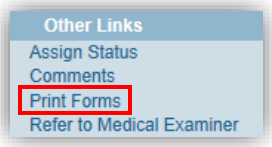
Click the **Save** button to send the request.

9. The status bar displays *Medical Certification Requested*.

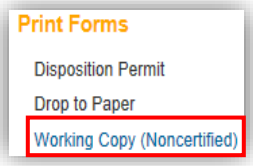
Printing a Working Copy (Noncertified)

Note: A working copy (noncertified) can be printed at any time, even after the case has been registered.

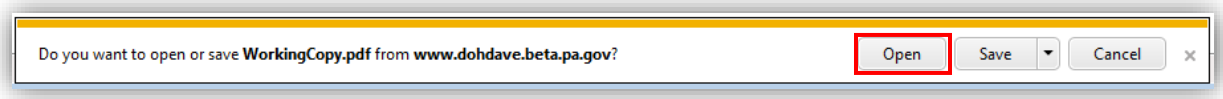
1. From the death case, click the **Print Forms** link in the *Other Links* section of the Death Registration Menu.



2. From the Print Forms screen, click the **Working Copy (Noncertified)** link.



3. At the bottom of the screen, click the **Open** button to display a working copy (noncertified) in a new window.



Note: The working copy (noncertified) will print ALL information that has been entered in the death case.

4. To print a working copy (noncertified), click the **Printer** icon located in the top left corner of the document.

Note: Clicking the **Printer** icon automatically sets the printer to the recommended settings for printing the working copy (noncertified).

5. Click the **Print** button to print the working copy (noncertified) and close the document window.

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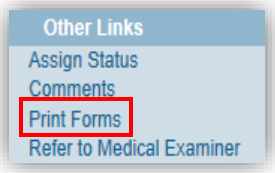
Dropping a Death Case to Paper

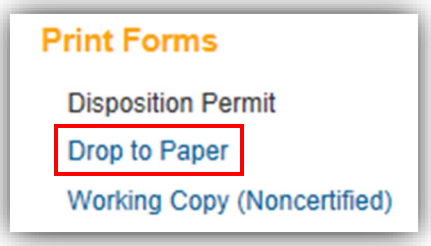
Note: An electronic death case can only be dropped to paper when it is signed **or** certified.

1. From the death case, click the **Print Forms** link on the *Other Links* section of the Death Registration Menu.



2. From the Print Forms screen, click the **Drop to Paper** link.

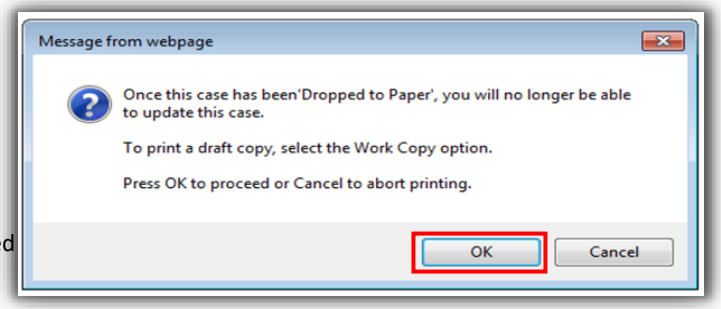
Note: The **Drop to Paper** link will be disabled if the case does not have a *Signed* or *Certified* status.



3. A confirmation box displays with important information. Click the **OK** button to proceed.

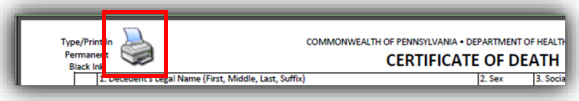
IMPORTANT: When a case is dropped to paper:

- The electronic case is locked, so no changes can be made.
- The drop to paper process cannot be reversed.
- Drop to paper certificates only print the data entered in your section of the death case.



4. At the bottom of the screen, click the **Open** button to display the drop to paper certificate in a new window.

5. Click the **Printer** icon located in the top left corner of the document.



IMPORTANT: When a case is dropped to paper:

- You only have ONE opportunity to print the paper certificate.
- Clicking the **Printer** icon automatically sets the printer to the recommended settings for printing.
- If you need to print this document again, contact the EDRS Hotline for assistance.

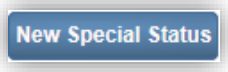
6. Click the **Print** button to print the certificate, then close the document window.

Abandoning a Death Case

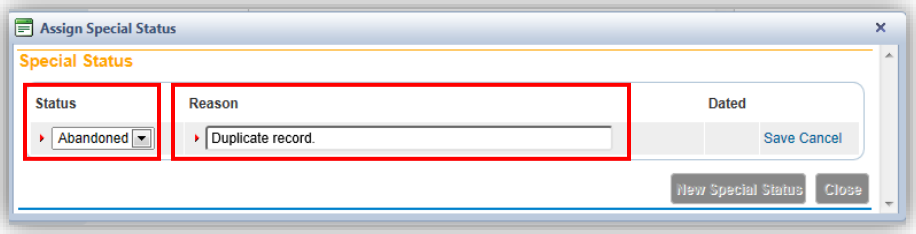
Notes: Electronic death cases cannot be removed or deleted, but abandoning a case will disable it. Therefore, all **unregistered** electronic case that cannot be completed should be assigned the status of "Abandoned." Registered cases cannot be abandoned and must be voided by the Division of Statistical Registries.

1. From the death case, click the **Assign Status** link.

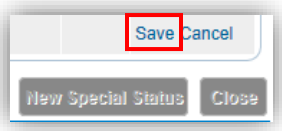
2. Select the **New Special Status** button from the *Assign Special Status* dialog box.



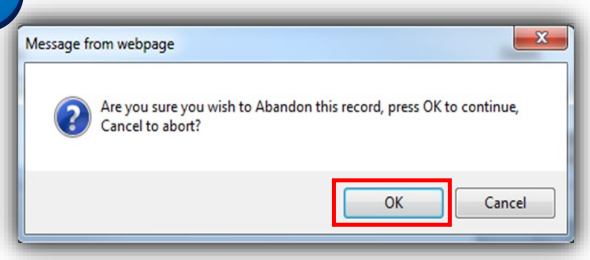
3. Select **Abandoned** from the **Status** drop-down list and enter a **Reason**.



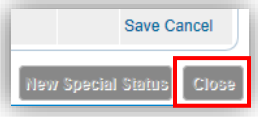
4. Click the **Save** link.



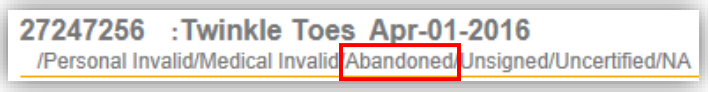
5. Click the **OK** button to confirm the status change.



6. Click the **Close** button.



7. The status bar now includes the word *Abandoned* and a checkmark now displays to the left of the **Assign Status** link on the Death Registration Menu.



Note: For detailed information on removing an abandoned status from a death case, reference **QRS-2018, Removing an Abandoned Case Status**.

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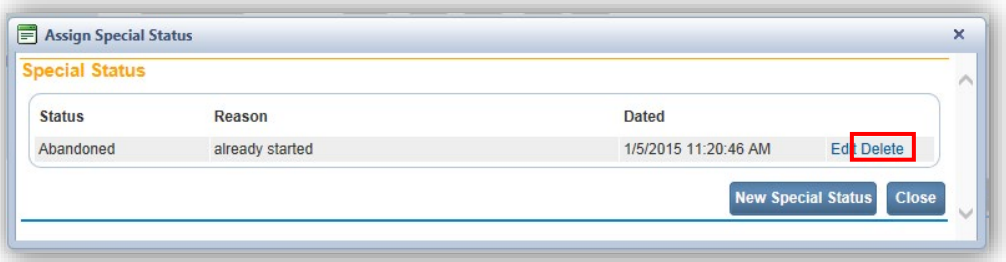
Removing an Abandoned Case Status

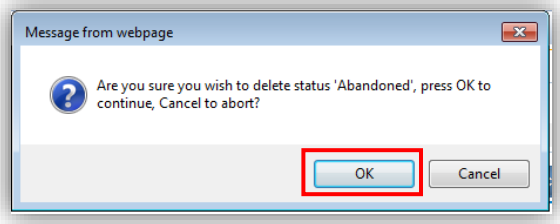
Note: Abandoned cases have the word *Abandoned* in the status bar, a checkmark next to the **Assign Status** link, and the case is read-only.

1. From the death case, click the **Assign Status** link.

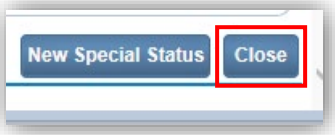
2. From the *Assign Special Status* dialog box, click the **Delete** link.



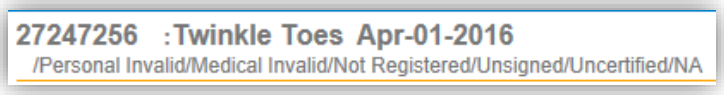
3. Click the **OK** button to confirm that you want to delete the status of *Abandoned*.



4. Click the **Close** button.



5. The checkmark no longer displays beside the **Assign Status** link, the case status returned to the status prior to abandonment, and the ability to enter or modify data has been restored.



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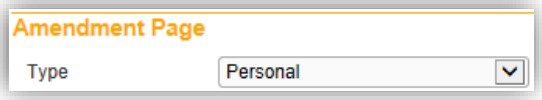
Amending a Death Case: Personal

Notes:

- This Quick Reference Sheet is for the role of a Funeral Director or Coroner/Medical Examiner only. This functionality is not for use by staff in a funeral home or coroner/medical examiner office. Use of another user's login credentials to perform this functionality is strictly prohibited and a violation of the User Agreement and Confidentiality Policy.
- Each amendment is reviewed for approval by the Division of Statistical Registries. Allow one full business day for this process to be completed.

1 From the registered death case, click the **Amendments** link in the *Other Links* section of the Death Registration Menu.

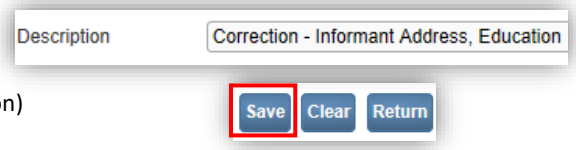
2 Select **Personal** from the **Amendment Page Type** drop-down list.



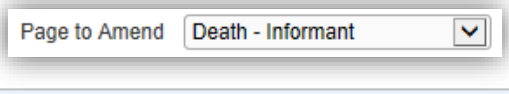
3 Enter an **Amendment Description** and click the **Save** button.

Use the following format: **Correction – Field Name(s)**

(Examples: Correction – Informant Address, Correction – Education)



4 Select the **Page to Amend** from the drop-down list.



5 The fields from the selected page display below the amendment request.

Make the necessary change(s) and click the **Validate Page** button.

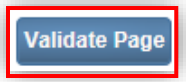
IMPORTANT: DO NOT CLICK SAVE UNTIL YOU HAVE COMPLETED ALL CHANGES.

6 An **Item in Error** table displays in the middle of the Amendment Page with all of the changes you have made.

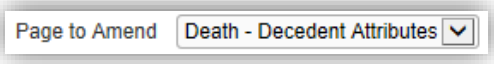
Review and confirm the changes.

Item In Error	Item as it Appears	Item as it Should be
Informant-Address Street Number	32	320
Informant-Address Zip Code	17112	17111

7 If there are any validation error messages, correct or override the message(s) and click the **Validate Page** button again.



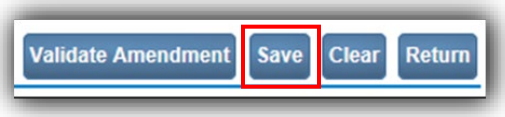
8 If additional information needs to be amended, select a new page from the **Page to Amend** drop-down list and repeat **Step #5** and **#6**.



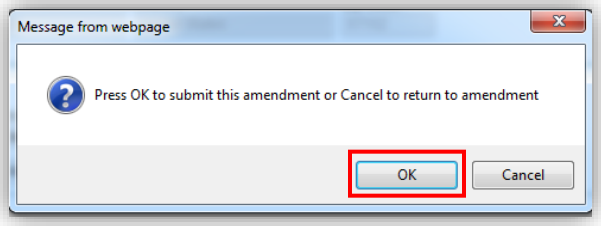
9 The **Item in Error** table updates to include the additional changes. Review and confirm the changes.

Item In Error	Item as it Appears	Item as it Should be
Informant-Address Street Number	32	320
Informant-Address Zip Code	17112	17111
Decedent Attributes-Education Level	No diploma; 9th-12th grade	High School graduate or GED completed

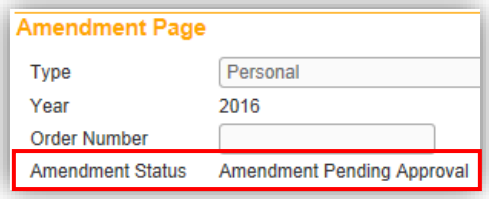
10 When all changes have been completed, click the **Save** button to save the amendment request.



11 Click the **OK** button to submit the amendment request.



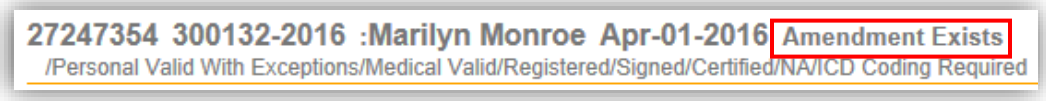
12 The **Amendment Status** now displays as *Amendment Pending Approval*. This status remains until the amendment is reviewed by the Division of Statistical Registries (allow one full business day for review).



13 Click the **Return** button to return to the Decedent screen.

Notes:

- The person who submitted the request is the only one who is notified when the amendment request is approved or rejected.
- Amendment requests and approved amendments can only be seen by users from the same facility. So if the funeral director submits an amendment request, the medical certifier will not be able to view the request or the submitted amendment.
- When an amendment request is approved, the status of the request changes to *Complete* and the words **Amendment Exists** display to the right of the decedent's name at the top of the screen.



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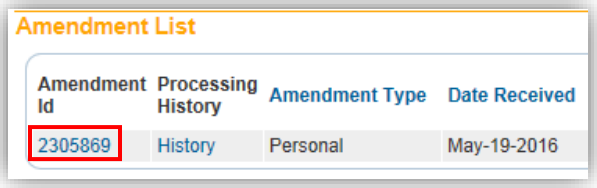
Editing an Amendment Request

Notes:

- This Quick Reference Sheet is for the role of a Funeral Director, Medical Certifier or Coroner/Medical Examiner only. This functionality is not for use by staff in a funeral home, medical office or facility, or a coroner/medical examiner office. Use of another user's login credentials to perform this functionality is strictly prohibited and a violation of the User Agreement and Confidentiality Policy.
- This is used when the Division of Statistical Registries has not yet approved the amendment. If it has been approved by the Division of Statistical Registries, then another amendment must be entered instead.

1. From the registered case, click the **Amendment List** link in the *Registrar* section of the Death Registration Menu.

2. Click the **Amendment ID** link to view the details of the amendment to be edited.

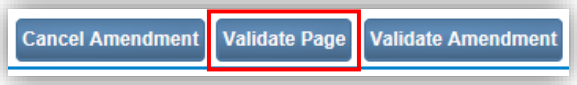


3. The Amendment Page displays. The data in the amendment request can be edited if the amendment status is *Amendment Pending Approval* and the **Item in Error** table displays with **Edit** links.

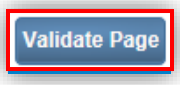
To edit the amendment request, click an **Edit** link to display the page that you need, or select a page from the **Page to Amend** drop-down list.

Note: To remove an item from the amendment request, click the **Delete** link for that item.

4. The selected screen displays. Make the necessary change(s) and click the **Validate Page** button.



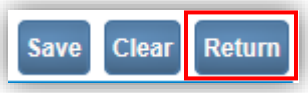
5. If there are any validation error messages, correct or override the message(s) and click the **Validate Page** button again.



6. The **Item to Amend** table updates to reflect all changes that were made.

   If additional changes need to be made, select the appropriate **Edit** link or select a new page from the **Page to Amend** drop-down list and repeat **Steps #4** and **#5.**

7. When finished, click the **Return** button to return to the Amendment List.



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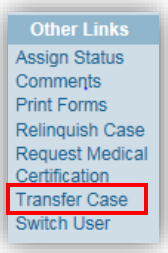
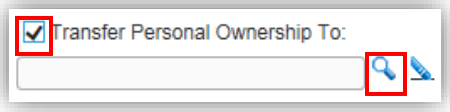
Transferring a Death Case from a Funeral Home to Another Campus

1 From the death case, click the **Transfer Case** link in the *Other Links* section of the Death Registration Menu.

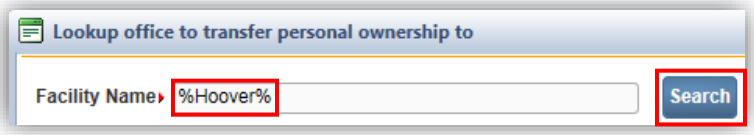


2 The Transfer Case screen displays. In the **Transfer Personal Ownership To** field, first click the **checkbox** to insert a checkmark. Then click the **Lookup** ( ) icon.

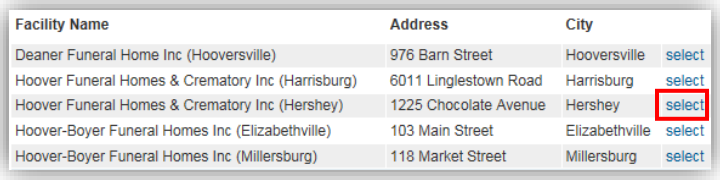


3 The *Lookup office to transfer personal ownership to* dialog box displays.

Search for the other campus' name by entering all or part of the **Facility Name** preceded and followed by the Wildcard symbol (**%**) in the **Facility Name** field and click the **Search** button.



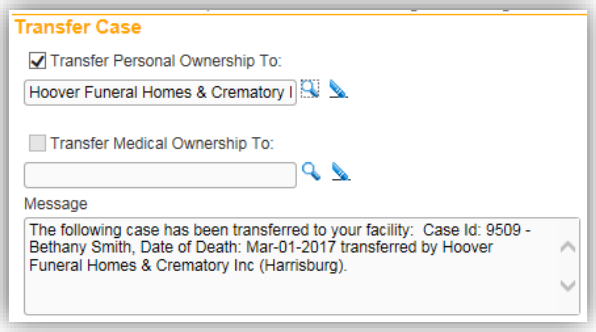
4 Click the **Select** link beside the name of the campus to whom the case is to be transferred.



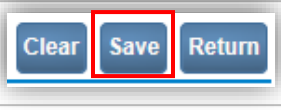
Facility Name	Address	City	
Deaner Funeral Home Inc (Hooversville)	976 Barn Street	Hooversville	select
Hoover Funeral Homes & Crematory Inc (Harrisburg)	6011 Linglestown Road	Harrisburg	select
Hoover Funeral Homes & Crematory Inc (Hershey)	1225 Chocolate Avenue	Hershey	select
Hoover-Boyer Funeral Homes Inc (Elizabethville)	103 Main Street	Elizabethville	select
Hoover-Boyer Funeral Homes Inc (Millersburg)	118 Market Street	Millersburg	select

5 The Transfer Case screen will display again. Review your selections and the auto-generated text in the **Message** field.

Optional: You may enter additional message text, but it is not required.



6 Click the **Save** button to transfer the case to the selected facility.



Notes:

- Clicking the **Save** button immediately transfers ownership to the other facility, which means that your facility will no longer be able to access the case. Before you click the **Save** button, make sure you are transferring the case to the correct facility.
- The other campus will receive the transferred case as a message in DAVE™ with a link to open the case.

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Viewing the Processing History of an Amendment

Notes:

- This Quick Reference Sheet is for the role of a Funeral Director, Medical Certifier or Coroner/Medical Examiner only. This functionality is not for use by staff in a funeral home, medical office or facility, or a coroner/medical examiner office. Use of another user's login credentials to perform this functionality is strictly prohibited and a violation of the User Agreement and Confidentiality Policy.

1

After an amendment is submitted, the **Amendment List** link displays in the *Registrar* section of the Death Registration Menu.

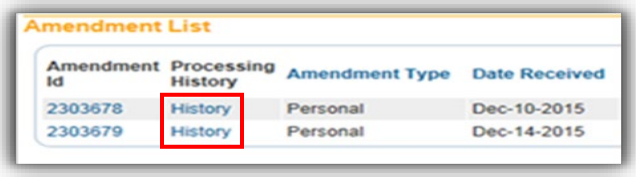
From the death case, click the **Amendment List** link to view all amendment requests and completed amendments that you have submitted for this case.

Note: You will not be able to view amendment information submitted by other users.

2

The **Amendment List** displays. Any notes or actions taken on the amendment can be viewed on the Processing History screen.

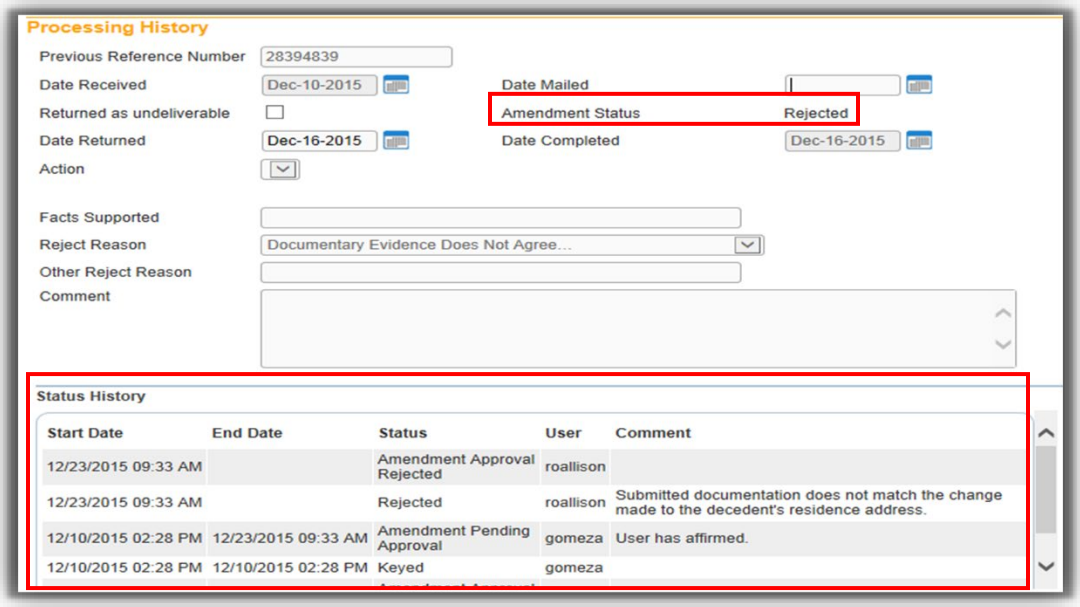
To view the history of an amendment, click the **History** link.



3

The Processing History screen displays. When an amendment request has been processed, information will be entered in the **Processing History** fields by the Division of Statistical Registries.

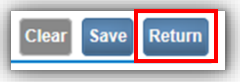
The **Status History** table displays every action related to the amendment along with the date, the status and the login of the user who took the action.



Amendment Statuses

- When an amendment is entered but has not been submitted for approval, the status displays as *Keyed* and *Amendment Approval Pending*.
- When an amendment has been submitted for review, the status changes to *Amendment Pending Approval*.
- If an amendment is approved, rejected, or cancelled the status changes to *Complete*, *Rejected*, or *Cancelled*.

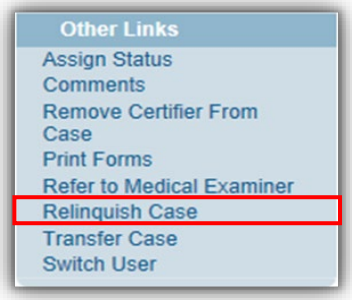
4 Click the **Return** button to return to the **Amendment List**.



Relinquishing a Case

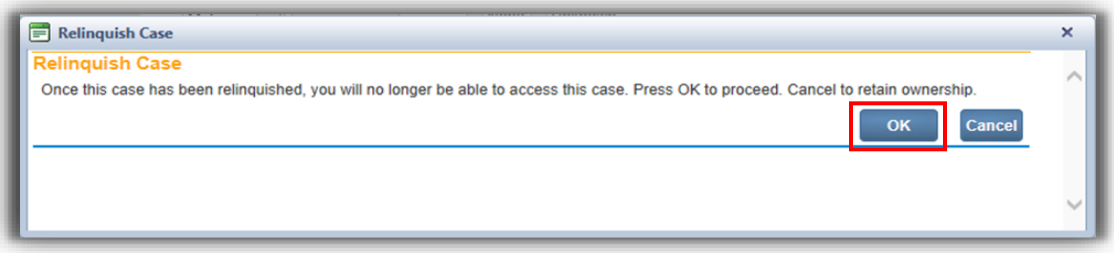
Note: This feature is used to remove ownership of a case from the entire facility. Relinquishing ownership can be performed by any end user from the facility that currently owns the unregistered death case. After the case has been relinquished, another facility can take ownership.

1. From the death case, click the **Relinquish Case** link on the *Other Links* section of the Death Registration Menu.



2. The Relinquish Case dialog box displays with a reminder that you will no longer have ownership of, or access to, the case once it is relinquished.

   Click the **OK** button to relinquish the case.



   After clicking the **OK** button, you are returned to the Home page.

NOTE: If no other facility has claimed ownership of the case, ownership can be reclaimed by using the **Start/Edit New Case** search to locate and open the case.

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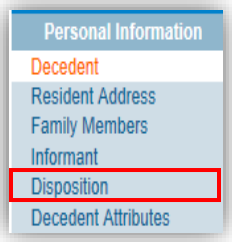
Selecting a Local Registrar

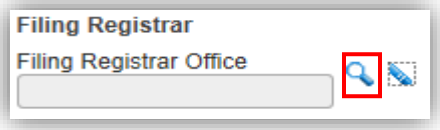
Notes:

- The **Lookup** ( ) icon **MUST** be used when selecting the Local Registrar.
- The coroner/medical examiner will only select a local registrar if he/she is responsible for final disposition and no funeral director is involved (meaning that the coroner/medical examiner selected "yes" to the question on the Decedent screen which asks "Will Coroner/Medical Examiner be responsible for final disposition?")

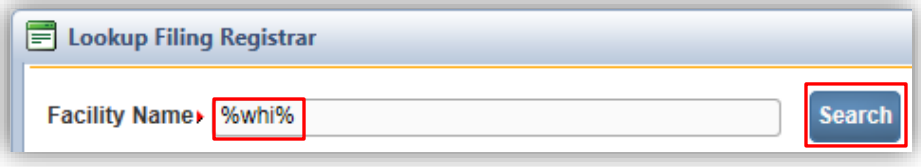
1 From the death case, click the **Disposition** link on the *Personal Information* section of the Death Registration Menu.



2 Click the **Lookup** icon to search for the **Filing Registrar's Office**.

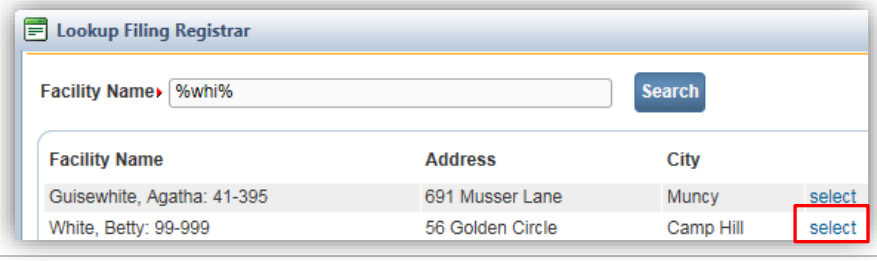


3 To locate the Filing Registrar Office, enter the first few letters of the **Registrar's Last Name** followed by the Wildcard symbol (**%**), then click the **Search** button.

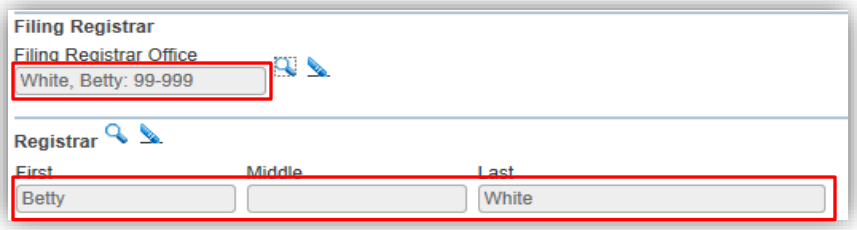


IMPORTANT: If you do not use the Wildcard symbol (**%**) when searching for the Filing Registrar Office, you will not be

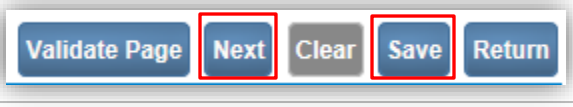
4 Click the **Select** link to select the Filing Registrar Office.



5 The selected **Filing Registrar Office** and **Registrar Name** now display in the *Registrar* Section.



6 Click either **Next** to move to the next screen or **Save** to retain the information.



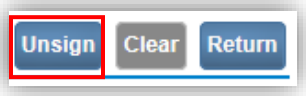
Unsigning a Death Case

Notes:

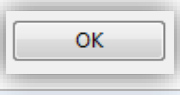
- This Quick Reference Sheet is for the role of a Funeral Director only. This functionality is not for use by funeral home staff. Use of another user's login credentials to perform this functionality is strictly prohibited and a violation of the User Agreement and Confidentiality Policy.
- If updated information is obtained on a case that has already been signed, **but not yet registered**, the funeral director can unsign the case to make the necessary updates.

1. From the death case, click the **Sign** link in the *Personal Information* section of the Death Registration Menu.

2. Click the **Unsign** button to unsign the death case.

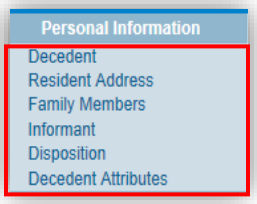


3. A Confirmation dialog box displays. Click the **OK** button to confirm the unsigning of the death case.

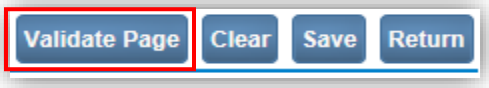


4. The case is now unsigned, and the **Sign** link no longer appears in the Death Registration Menu.

5. Make the necessary updates to the *Personal Information* section.

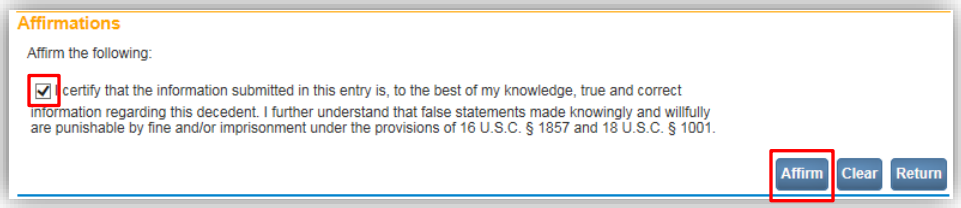


6. When all revisions are complete, click the **Validate Page** button to revalidate the death case and verify that all updates are accurate.



7. When validation is successful, you must re-sign the death case. Click the **Sign** link.

8. Click the check box (☐) to affirm, and click the **Affirm** button.



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Adding Comments

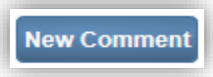
Notes:

- Comments should be pertinent to the overall death registration process.
- Comments should not be used to respond to data entry queries from the Department of Health.
- Anyone that accesses the case will be able to view the comments.

1 From the death case, click the **Comments** link in the *Other Links* section of the Death Registration Menu.

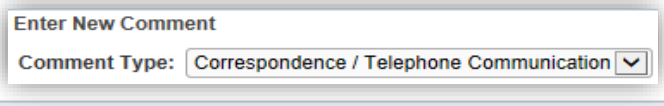
2 The **Comments** dialog box displays.

Click the **New Comment** button to enter a new comment.

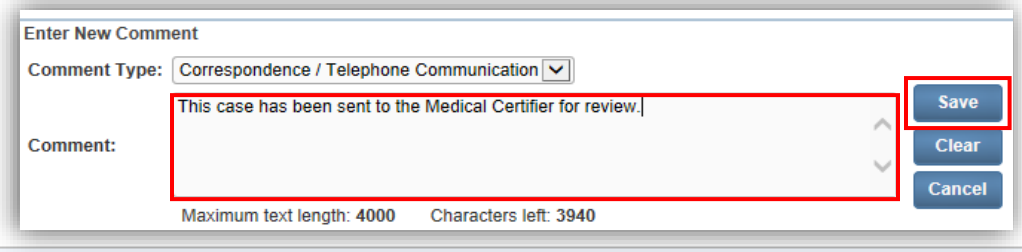


3 The *Edit New Comment* section displays.

Select a **Comment Type**.



4 Enter your comment in the **Comment** field and click the **Save** button.



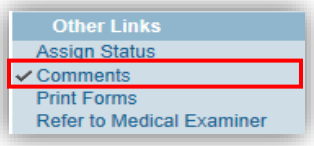
5 The **Comments** dialog box displays the newly added comment.

When finished with the comments, click the **Close** button.

Notes:

- You can edit or delete comments by using the **Edit** or **Delete** links.
- You can only edit or delete comment(s) that you created.
- To add another comment, click the **New Comment** button.

6 The death case displays with a checkmark to the left of the **Comments** link to indicate that one or more comments are associated with this case.



Printing a Disposition Permit

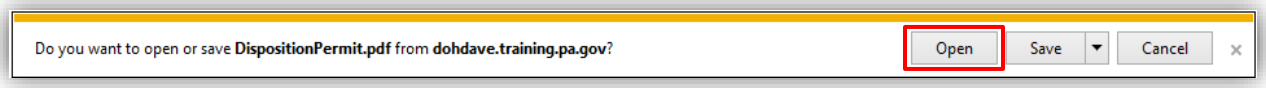
Notes:

- A disposition permit may be printed for either electronic cases or drop to paper cases.
- For drop to paper cases, the disposition permit can be printed by the funeral home after the case is signed and dropped to paper.
- For fully electronic cases, the disposition permit can be printed by the funeral home after the case is affirmed and registered by the local registrar.

1 From the death case, click the **Print Forms** link in the *Other Links* section of the Death Registration Menu.

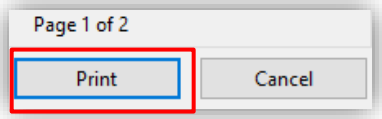
2 From the Print Forms screen, click the **Disposition Permit** link.

3 At the very bottom of the screen a dialog box displays asking if you want to open or save the document. Click the **Open** button to open the disposition permit and generate a permit number.



4 The disposition permit opens as an Adobe Reader (pdf) file in another window. Review the disposition permit to verify that the information displays correctly, then click the **Printer** icon located in the top left corner of the document.

5 A Print dialog box displays. Click the **Print** button to print the disposition permit.



Note: Two copies of the disposition permit will print, so be sure your printer is not set to print on both sides of the paper. Provide both copies to the place of disposition. The authorized representative at the place of disposition will retain one for their records and send the other one to the local registrar of the district in which the place of disposition is located. The funeral home and the filing local registrar will both have access to the disposition permit online via DAVE™ so there is no need for either of them to retain a paper copy.

6 Close the window containing the Adobe Reader (pdf) file of the disposition permit by clicking the **X** in the top right corner of that window.

Note: The disposition permit will reflect the information that is in DAVE™ at the time the permit is printed. Fields that are blank in DAVE™ will remain blank on the permit, allowing them to be completed manually on the permit after it is printed. Fields where a value of "unknown" exists in DAVE™ will print as "Unknown" on the permit. Partially unknown dates will skip the unknown portion: for example, if Mar-99-1950 is keyed in DAVE™, "March 1950" will print on the permit.

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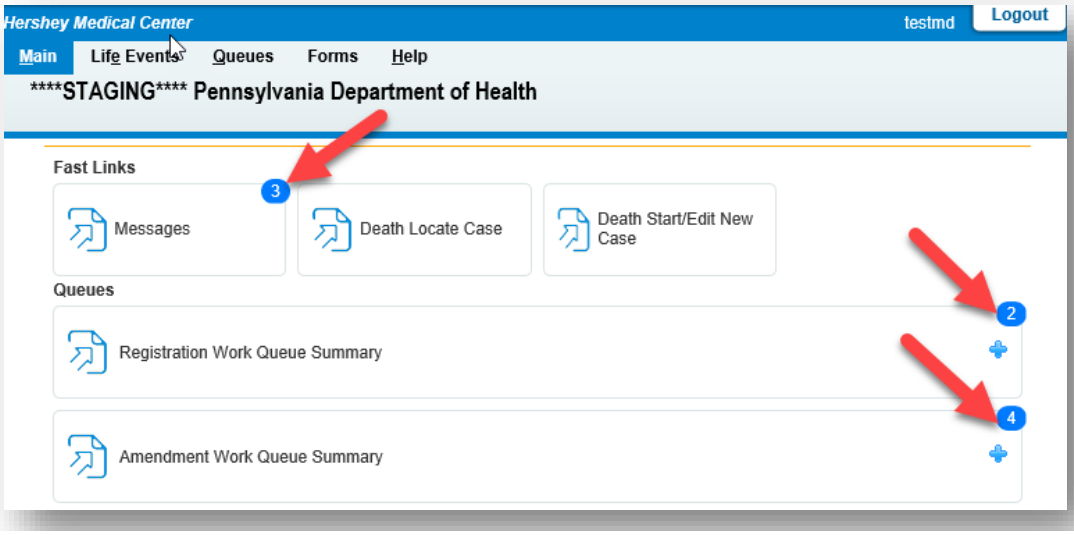
Utilizing Messages and Queues from the Home Screen

Notes:

- This Quick Reference Sheet provides guidance on the Messages and Queues quick links found on the Home Screen. These Fast Links create a dashboard to help you manage your work at a glance.
  - Messages may be system-generated, such as an alert that a case has been transferred to your facility, or that an amendment has been approved. Or, they may be sent to you by another EDRS user.
  - Queues are separated into Registration Work Queues and Amendment Work Queues. The former contains cases owned by your facility that require further action by your office to complete. The latter contains amendments in progress, but not completed.

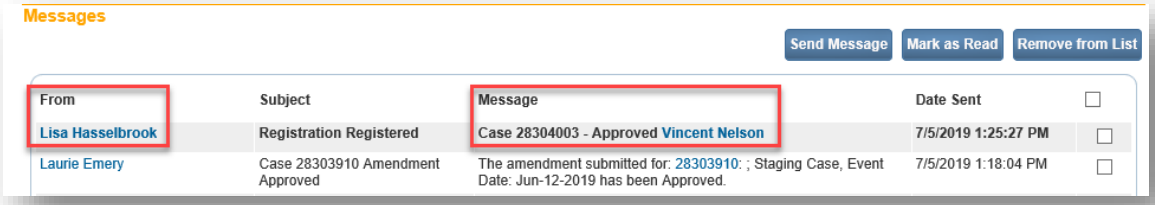
1

On the Home screen, there are **Messages** and **Queues**, each with an indicator number in the upper right corner. The number for Messages indicates how many new messages you have, and the number for each of the Queues is the quantity of items that require attention for registration or amendment activity.



2

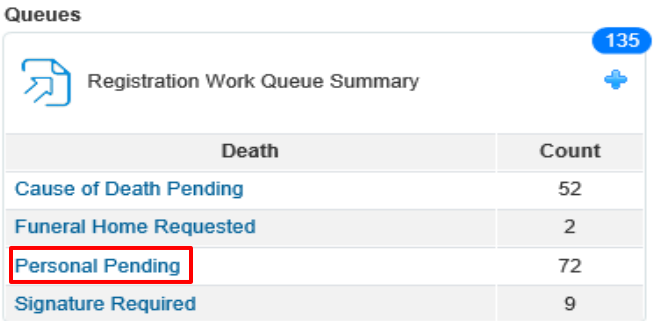
Clicking on the **Messages** box on the Home screen will take you to the Messages inbox. Unread messages show in **bold** text. Messages regarding a case you own will contain a hyperlink, either to the decedent name or the Case ID.



Click the **name** link in the From column to open the message in a popup window or click on the hyperlinked **decedent name** or Case Id in the Message column to access the case.

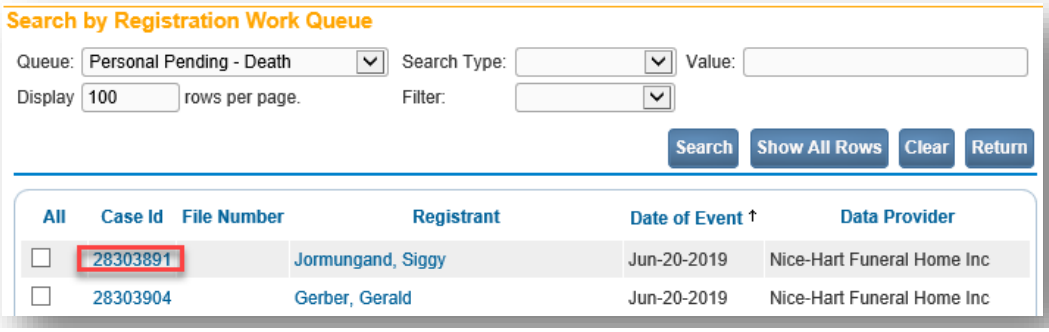
3

Clicking on the **+ icon** for a **Queue Summary** box on the Home screen will expand the box to provide additional details and links to the queues. Clicking the name of the queue will take you to a listing of cases having that status.



4

From the queue listing, you can easily access the case by clicking the **Case ID** or **decedent name**.

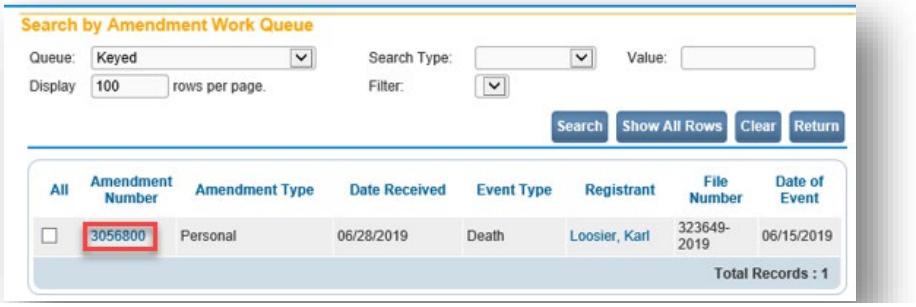


5

Monitor the status of your pending amendments through the **Amendment Work Queue Summary.** Remember, if an amendment shows the *Keyed* status it has not yet been submitted for approval. Click on the **Keyed** queue link to easily access the amendment and send it for approval.

6

From the queue listing, you can easily access the amendment by clicking the **Amendment Number** link.

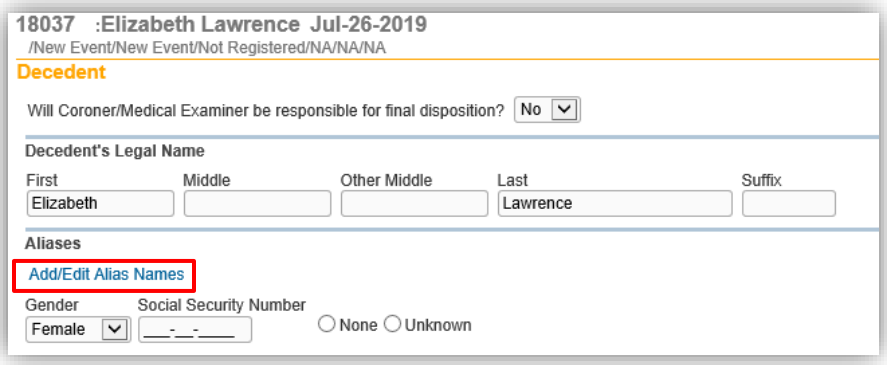


Entering an Alias

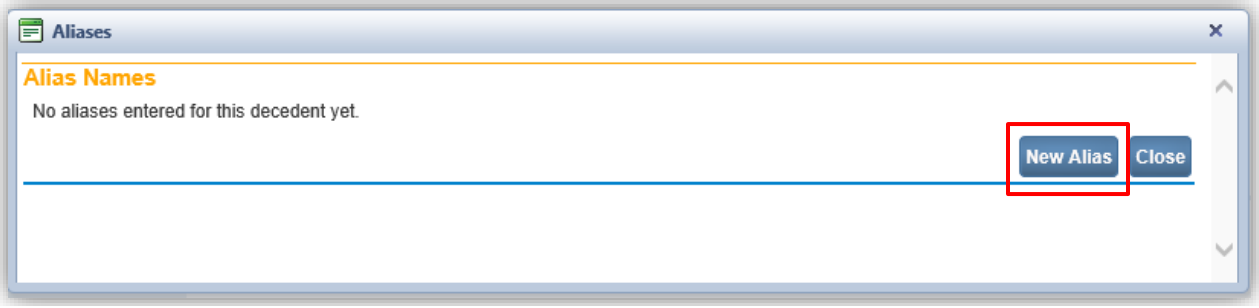
Notes: The **alias** should be listed if it is **substantially different from the decedent's legal name** (e.g. Samuel Langhorne Clemens AKA Mark Twain or Elizabeth Lawrence AKA Sister Mary Lawrence). An alias does **not** include:

- Nicknames, unless used for legal purposes or at the family's request.
- Spelling variations of the first name.
- Presence or absence of middle initial.
- Presence or absence of punctuation marks or spaces.

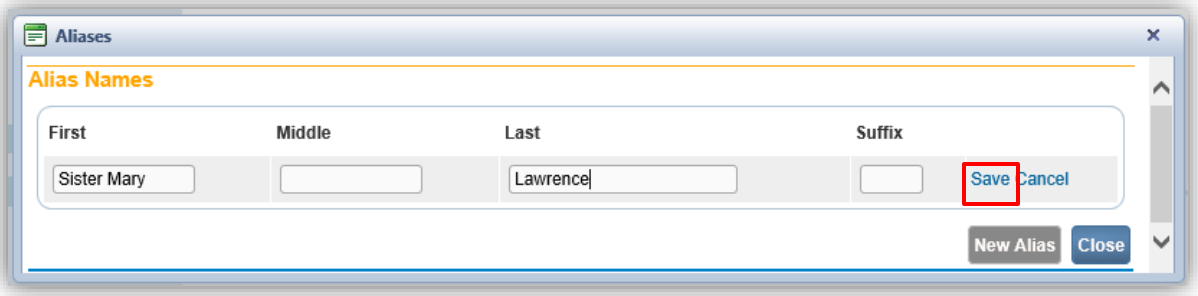
1 From the Decedent screen, click the **Add/Edit Alias Names** link.



2 In the Alias Names popup box, click the **New Alias** button.

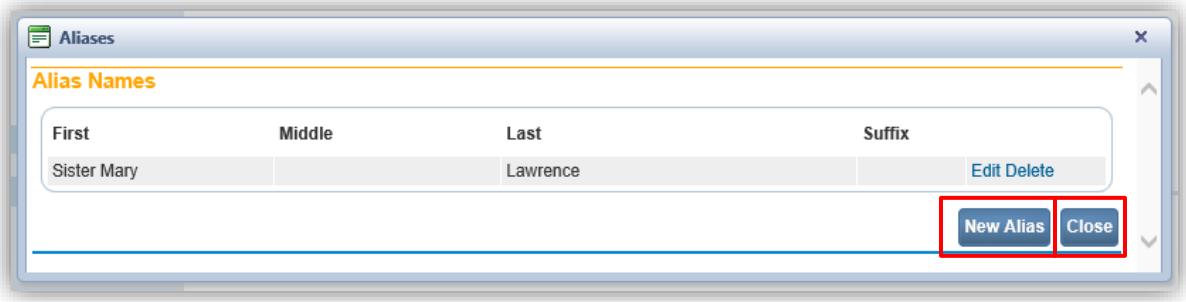


3 Enter the alias name and click **Save**.



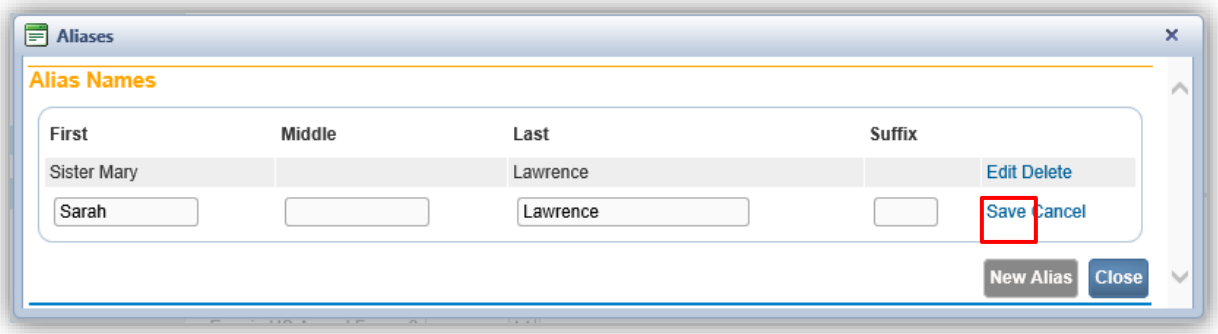
4

If the decedent had multiple aliases, click the **New Alias** button to add another alias, otherwise click **Close**.



5

If adding an additional alias, enter the alias name and then click **Save**.



6

Click **Close** to complete the alias process and return to the Decedent screen.