Local Registrar Module
 Purpose of EDRS

- Enables the participants of death reporting to file cases with local and state registrars electronically.
- Improves the timeliness and quality of mortality data.
- Supports the goal of near real-time surveillance to improve public health preparedness.
EDRS Features

- Available 24 hours/day, 7 days/week
- Highly secure and Internet-accessible
- Paperless filing of a death case with user-friendly data entry screens
- On-line help and instructions built into the system
- In 2017, EDRS was rolled out to the entire state for funeral directors, coroners/medical examiners and local registrars (some health care facilities are also participating)
Overview of Local Registrar Responsibilities in EDRS

- Print vault copies for fax attestation cases (for cases electronically signed by the funeral director only)
- Affirm and register the case, and print the vault copies (for cases electronically signed by both the funeral director and the medical certifier)

For detailed instructions, refer to the Local Registrar User Guide.
Local Registrar Responsibilities

- The 96-hour (4 business day) limit must be maintained, so all electronic cases still need to be registered within this time frame.

- You are still responsible for reviewing the death case information for accuracy and correctness.

- You are still responsible for registering death cases.

- You still issue certified copies to the funeral director.

- You are able to issue certified copies of a registered record for up to 90 days from the date of registration.
There are two types of “drop to paper” cases you will receive in paper form:
- Drop to paper by medical certifier, which has the medical information completed electronically (an example is shown to the left)
- Drop to paper by a funeral director, which has the personal information completed electronically (these are rare because most funeral directors who use DAVE™ will have fully electronic or fax attestation cases)

Drop to paper cases have a Case ID # in the bottom left corner.
Fax Attestation

- The following slides describe the fax attestation process, used for cases that were signed electronically by the funeral director.

- The highest volume of EDRS cases are fax attestation. The name “fax attestation” originated because the funeral director faxes an attestation of the medical information to the state office to be entered in DAVE™.

- The local registrar will only know that this type of case exists when the funeral director orders certified copies. The local registrar will have to search for the case in DAVE™ (the system for EDRS) based on information provided by the funeral director.
• The web address, username and temporary password will be provided to you following training.

• Enter the web address in your web browser to bring up DAVE™.

• Enter the username and temporary password.

• Click the **Login** button.

• You will be prompted to change your password and choose a security question the first time you login.
Performing a Death Search

- The Home screen displays.

- The **Death Search** function is used to search for any death case that is associated to the local registrar's filing office. The registration can be a completed case or a case with any status where the local registration office has been selected, including abandoned cases.

- You can begin a death search by selecting **Life Events > Death > Search** from the **Main** toolbar or by clicking the **Death Search** fast link.
Performing a Death Search

- The Search screen displays.

- There are two types of death case searches that can be performed in DAVE™ - **Search by Identifier** or **Search by Registrant or Data Provider**.

- The recommended search method is by the **Case Id** number. It is the most accurate and effective. Case Id is found under **Search by Identifier**. Enter the Case Id number provided by the funeral director and click the **Search** button.

- When searching, the information entered must be an exact match to the case. If the case cannot be located, verify the information with the funeral director.
When using the Case Id number to search, the Death Search Results screen displays with the death case.

If the case cannot be found, a message will display that there are no records matching the criteria entered. If this occurs, verify the Case Id number with the funeral director.

Click on the Preview link to view more information about the case.
Previewing Results and Selecting the Case

- Additional case information displays after clicking on the **Preview** link. You can review the information to verify you have located the correct case.

- The last line of the Preview section is the case Status bar. If this is a fax attestation case, “Dropped to Paper” will be included in the Status bar and you will be able to print the vault copy.

- If this is the correct case, click on the **Select** link or the **Decedent’s Name** link to open the case.
The case is opened and displays the Decedent screen.
• After opening the case, it is necessary to check for Amendments prior to printing a vault copy.

• The following slides describe the process to check for and review Amendments to a registered record.

• The local registrar is not authorized to make corrections using the notation in red at the bottom of each certified copy when issuing from a vault copy. All corrections to cases in DAVE™ must be done in DAVE™.
• DAVE™ is designed to track actions or changes taken on any case entered in DAVE™. The **Event and Issuance History** link, which is located in the *Other Links* section of the Death Registration Menu, enables you to identify and view the actions and the user that performed each action.

• Click the **Event and Issuance History** link.
Checking for Amendments

- The Event and Issuance History screen displays. The only checkbox selected in the **Include in List** field is the **Amendments** checkbox.

- If no Amendments exist, a No data found message displays. When this occurs, the vault copy may be printed.

- However, if there are Amendments for the case, you may not print the vault copy before determining the status of the amendment(s). Click the **Detail** link to view the details of each Amendment.

```plaintext
Event & Issuance History

Include in List:
- Actions
- Issuances
- Amendments
- Audit Logs
- Change Logs
- Extracts/Loads
- Orders
- Signature

No data found.

Event & Issuance History

Include in List:
- Actions
- Issuances
- Amendments
- Audit Logs
- Change Logs
- Extracts/Loads
- Orders
- Signature

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Total Records: 2
Checking Amendment Status

- The Amendment Detail screen will display. Review the entries in the Status column.

- The vault copy may be printed if the status is Complete and there are no other pending Amendments.

- DO NOT print the vault copy when the status is Amendment Approval Pending or Amendment Pending Approval. Inform the funeral home that an amendment is pending and that the vault copy may be printed as soon as the amendment has been approved.

- DO NOT print the vault copy when the status is Keyed. Contact the funeral home to either finish the amendment or cancel it.

- After reviewing the status, click Return to return to the Event and Issuance History screen. Then click Return again to return to the Decedent screen.
After ensuring there are no pending amendments to the death case, the vault copy may be printed for issuing certified copies. Proceed to slide 34 for instructions on printing the vault copy and issuing certified copies for fax attestation cases.
The following slides describe the process for Affirming and Registering cases that were signed electronically by both the funeral director and by the medical certifier (physician, CRNP, PA-C, coroner or medical examiner).
Affirming and Registering a Case: Messages

• Messages is the tool DAVE™ uses to communicate work that is being performed.

• You can open Messages by selecting Main > Messages from the Main toolbar or by clicking the Messages fast link on the Home screen.

• Messages are either system-generated as cases are processed, or text messages sent from one user to another user or group of users.

• DAVE™ will automatically send a variety of messages when work is completed on a case. You should check your Messages when you first login to DAVE™ and periodically throughout the day.

Examples:

• Registration Affirmation messages will be delivered when both the medical certification and the personal information have been completed and signed by each user and the case is ready for the local registrar to “file” (or “affirm,” in DAVE™ language).

• The funeral director can send the local registrar a message through DAVE™ to request a number of certified copies to be issued for a particular case. (This is not true when a funeral director files with a branch office.)
• To view the entire message, click on the name of the sender in the “From” category. To access the case from the Messages box, click on the decedent’s name link.
- When you click on the decedent’s name link in the message, the Decedent screen displays.

- There is some information not validated by DAVE™ that you will need to review and verify for accuracy.

- Click the **Cause of Death** link under the *Medical Certification* section of the Death Registration Menu. Do **not** click on the **Validate Page** link.
Affirming and Registering a Case: Reviewing Medical Information

- The Cause of Death screen displays.
- Review all of the **Cause of Death** information listed in **Parts I and II**.
- It is important when reviewing the medical information to verify that the coroner/medical examiner was contacted when a death was due to suspicious or non-natural circumstances.
- Click the **Other Factors** link under the **Medical Certification** section of the Death Registration Menu.
Affirming and Registering a Case: Reviewing Medical Information

- The Other Factors screen displays.
- Review the *Manner of Death* and *Was Medical Examiner or Coroner contacted?* information.
• If the Manner of Death is Natural, and the Cause of Death reflects a death due to natural causes, you can proceed to register the case.

• If the Manner of Death is Natural, but the Cause of Death reflects a death due to suspicious or other than natural causes, the case must be referred to the coroner/medical examiner. If the Other Factors screen shows that the case was NOT referred to the coroner/medical examiner, do not proceed to register the case. You must notify the funeral director on record stating that the case requires referral to the coroner/medical examiner based on the information in the Medical Certification section.

NOTE: If the Manner of Death is Natural and a coroner/medical examiner was contacted, even if the Cause of Death is consistent with suspicious or non-natural circumstances, proceed to register the case.
Affirming and Registering a Case: Changing Name of Filing Registrar

- If you are the local registrar, you may now begin to affirm and register the case. To do so, proceed to slide 31.

- The deputy registrar must click the **Disposition** link under the **Personal Information** section of the Death Registration Menu to perform additional steps (as shown in the next few slides) that must be completed before being able to register the case.

- Click the **Disposition** link.
Affirming and Registering a Case: Changing Name of Filing Registrar

• Notice that the **Registrar** name fields are pre-populated with the local registrar’s name selected by the funeral director. However, DAVE™ allows you to edit the existing Registrar information.

**NOTE:** The name in the Registrar section is the name that will appear on the death record.

• Use the **Lookup** icon to search for your name.

• Click the **Lookup** icon.
Affirming and Registering a Case: Changing Name of Filing Registrar

- The **Lookup Local Registrar** dialog box displays.
- Because DAVE™ will only search for Registrars associated to the current office, you can simply enter the wildcard symbol (%) to look up your name.
- Enter % and click **Search** to initiate the search.
• A list of possible matches displays. Click the Select link for your name to enter the information in the remaining fields.
Affirming and Registering a Case: Changing Name of Filing Registrar

• In order to save the change, you must click **Save**.

**NOTE:** If you do not click the **Save** button before moving to another screen, the case will revert back to the previous Filing Registrar and you will have to repeat the process to change the Filing Registrar.

• The deputy registrar’s name is now displayed on the death case.
Beginning on this slide, the local registrar and deputy registrar processes are the same. Click on the **Local Registrar Affirm** link under the **Registrar** section of the Death Registration Menu.
• At this point, you have opened the case, reviewed the Cause of Death, changed your name (if you are the deputy registrar) and are ready to sign the case.

• Check the box next to the statement to indicate you affirm you are authorized to approve this case for filing. Click the **Affirm** button.
Affirming and Registering a Case

- Once the local registrar (or deputy registrar) affirms the case, it becomes registered. This means:
  - A vault copy is now available for printing.
  - An **Approved** message is sent to all parties involved in entering the information for the case.
  - The Disposition Permit can be accessed and printed by the funeral home listed on the record.
  - Any changes that would need to be made to the record at this point would need to be made by doing an amendment to the record.
The steps for printing the vault copy will differ based on whether the funeral director will generate a disposition permit from DAVE™ or if he/she will use a pre-signed disposition permit.

- If the disposition permit will be generated by DAVE™, proceed to the next slide.
- If a pre-signed disposition permit will be used, follow the steps beginning on slide 44.
• This process is for when the funeral director will generate the disposition permit from DAVE™. Ensure that the case is newly affirmed before proceeding.

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

• Click the **Disposition Permit** link.

**NOTE:** DAVE™ automatically transfers the permit number to the vault copy when the Disposition Permit is opened. The permit number is then printed on the vault copy, eliminating the need to manually write the permit number on the vault copy.
When the Disposition Permit PDF is created, a dialog box displays at the bottom of the screen asking if you would like to open or save the disposition permit.

Click Open.
• The Disposition Permit opens in another window.
• Verify that the permit number was generated, then click the Close (x) button to close the permit.
• From the Decedent screen, click the **Print Forms** link which is located in the *Other Links* section of the Death Registration Menu.

• Then click the **Vault Copy** link. If the link is not available, the funeral director has not yet clicked the button to drop the case to paper. If this occurs, contact the funeral director to perform this step.
• When the vault copy PDF is created, a dialog box displays at the bottom of the screen asking if you want to open or save the vault copy.

• Click **Open**.

**NOTE**: A vault copy is used to issue the certified copies after the death case has been registered.
Printing the Vault Copy

- The vault copy opens in another window. Review the certificate to verify that the information displays correctly, including file date.

- Click the **Printer** icon in the top left corner of the document to print the legal size version of the Certificate of Death.

**NOTES:**

- It is possible that neither box will be checked for Items #25 and/or #27. This is a valid display of the data that exists in DAVE™, and no action is needed on the part of the local registrar.
- Clicking the Printer icon automatically sets the printer to the recommended settings. Before beginning the process of printing, verify that your printer is connected to your computer and that it is powered on.
Printing the Vault Copy

- The Print settings box displays.
- Click the Print button to print the document.

**NOTE:** If you experience difficulties printing the document, please check your printer User Manual for troubleshooting instructions.
• When finished, click **Close (X)** to close the document window.

**NOTE:** In fields where the funeral director or coroner/medical examiner entered “unknown” it will print as “unrecorded.”
Issuing from the Vault Copy

- Certified copies will be issued using the vault copy (which is the newly printed copy from your printer). Use the current reduction settings on your photocopier to print certified copies on safety paper.
- Shred the vault copy when finished printing the certified copies.
- Maintain your current tracking process to record certified copies issued and safety paper numbers using your monthly Schedule of Certified Copies Issued and Income Earned forms.
- If the funeral director requests additional certified copies of a death record previously registered in DAVE™, you will have to perform a death search to find the case and check the Event and Issuance History again for pending amendments prior to issuing. This ensures that the most current version of the record is being used to issue certified copies.
The following slides describe the process to prepare for printing a vault copy when the funeral director will be using a pre-signed disposition permit.
• If the case is fully electronic, the local registrar must replace the automatically generated disposition permit number in DAVE™ with the number on the pre-signed permit.

• If the case is fax attestation, the local registrar must check to see whether a disposition permit number was generated in DAVE™. If it was, it must be replaced with the pre-signed disposition permit number. If it was not, the pre-signed disposition permit number must be entered.

NOTE: If the case is fully electronic, ensure it is newly affirmed (so that no amendments are pending) before proceeding.
Printing a Vault Copy for a Case with a Pre-Signed Disposition Permit

- From the death case, click the **Identifiers** link on the **Registrar** section of the Death Registration Menu.
• The Identifiers page will display. Look at the Disposition permit section of the page.

• If the correct number from the pre-signed disposition permit is displayed, no action is required. If it is not, enter the correct number.

• If a disposition permit number was automatically generated (as shown in the example above preceded by an “E”), delete that number and replace it with the pre-signed disposition permit number. Click the Save button.

• Click the Return button to exit or proceed with printing the vault copy by following the steps beginning on slide 38.
The following slides describe how to view, create and edit Comments on a case. Comments are used to replace late letters.
A checkmark next to the **Comments** link in the *Other Links* section of the Death Registration Menu indicates that one or more comments have already been added to the death case.

Comments are used to replace late letters and may be added to the case by either the personal owner or the medical owner.
• The **Comments** link allows you to view all existing comments, create new comments, and edit or delete comments you have created.

• Click the **Comments** link to view comments for this death case.
The **Comments** dialog box displays with all existing comments for the death case.

Comments must be pertinent to the overall death registration process. When creating a comment, keep in mind that everyone that accesses the case will be able to see your comments.
• You have the ability to view comments created by other users, but you can only edit and delete comments that you have created.

• If the entire comment is not visible, hover your cursor over the comment or click the View link to the right of the comment to view the rest of the text.

• Click New Comment to create a new comment.
Creating a New Comment

- The **Comments** box expands to display the **Enter New Comment** fields. Click the **Comment Type** drop-down arrow to view the types of comments you can create.

- When selecting a **Comment Type**:
  - Use **Correspondence/Telephone Communications** for comments regarding communication with the family, funeral home, medical examiner, etc.
    
    **Example:** Per phone conversation with the funeral director, the case was referred to the coroner/medical examiner's office because of the fall 2 days ago.

  - Use **Other Comments** for all other types of comments.
    
    **Example:** The case was filed after the 96-business hours timeframe because the family was delayed in providing all of the required information.
Creating a New Comment

- Click in the **Comment** field to enter a comment.
  - Click **Clear** to delete the text entered.
  - Click **Cancel** to cancel the comment(s) and return to the previous screen.
As a review, the following slides outline each procedure for processing the types of cases you will receive.
You will receive two types of death cases on paper:
- Completely paper certificates (current manual paper process)
- Drop to Paper certificates (these are the certificates that have a Case Id number in the bottom left corner of the certificate)

You will receive two types of electronic death cases:
- Fax attestation
- Completely electronic by both funeral director and medical certified

The following slides will outline the procedure for processing each of these types of cases.
This is the current manual paper process in which both the funeral director and the medical certifier have completed their information on a paper Certificate of Death (Form H105-043).

Your process to follow for these cases is:

1. Review the Certificate of Death for missing items, coroner/medical examiner referrals.
2. Sign, date, and enter your district number in Items #40-42 of the completed Certificate of Death.
3. Issue requested certified copies.
4. Submit Certificate of Death with your weekly report each Friday to the State Office. Be sure to record the Certificate of Death on your LR-10 form.
Business Process Review:
Drop to Paper Cases

These are cases in which the medical certifier has completed the medical information in DAVE™ but the funeral director must complete the personal information on a paper Certificate of Death (Form H105-043).

Your process to follow for these cases is:

1. Review the Certificate of Death for missing items, coroner/medical examiner referrals.
2. Sign, date, and enter your district number in Items #40-42 of the completed Certificate of Death.
3. Issue requested certified copies.
4. Paperclip all drop to paper Certificates of Death together and submit at the top of your weekly report each Friday to the State Office. Be sure to record the Certificates of Death on your LR-10 form.
Steps to Process Electronic Death Cases

Fax Attestation:
1. Search for and open case
2. Review Amendments and Comments
3. Print vault copy (following procedures depending on type of disposition permit to be used)
4. Issue certified copies

Fully Electronic:
1. Open message and case
2. Review Cause and Manner of Death (and change name if deputy registrar)
3. Affirm case
4. Print vault copy (following procedures depending on type of disposition permit to be used)
5. Issue certified copies
Business Process Review: Fax Attestation Cases

These are cases in which the funeral director has completed their information in DAVE™, received the medical information and attestation from the certifier, and faxed that information to the state office to be entered in DAVE™. Your process to follow for these cases is:

1. Perform a search for the case. These cases will not show up in your Messages.
2. Open the case and click on the Event and Issuance History link in the Death Registration Menu.
3. If there are amendments listed, review the details for each amendment to make sure all amendments have a Complete status.
4. Before opening the vault copy, follow procedures to prepare vault copy based on the type of disposition permit used.
5. Open the vault copy. Review the vault copy to ensure the permit number and file date are correct. If these are incorrect or missing, contact the Local Registrar Unit.
6. Use vault copy to issue certified copies requested by funeral director.
7. Shred vault copy after issuing has been completed.
These are cases in which both the funeral director and the medical certifier have completed their information in DAVE™. Your process to follow for these cases is:

1. Find the case in your **Messages**.
2. After opening the case, review the Cause and Manner of Death to ensure it has been referred to the coroner/medical examiner, if necessary.
3. Affirm the case (if deputy, name of Filing Registrar must be changed first).
4. Before opening the vault copy, follow procedures to prepare vault copy based on the type of disposition permit used.
5. Open and print the vault copy.
6. Use vault copy to issue certified copies requested by funeral director.
7. Shred vault copy after issuing has been completed.
Business Process Review: 
Additional Notes

• If you find that amendments have been submitted and not approved (after more than one business day), you may contact the Local Registrar Unit to discuss the issue.

• Any vault copies printed from DAVE™ must be shredded after issuing. They are not to be sent to the New Castle Office, recorded on the LR-10 form, or counted as submission on your reports.

• Before issuing additional certified copies requested by a funeral director, you must again check the Event and Issuance History for any amendments before printing another vault copy to use for issuance.

• Any Application for Certified Copy of Death Record (aka. Veteran application) that you receive for an electronic record should be marked with the “ID on File” notation and the State File Number at the top. These are to be submitted with your weekly report each Friday without the vault copy.
The **Local Registrar User Guide** is located under the Help Tab. Please use this as a reference guide when completing cases within DAVE™.
EDRS Contact Information

EDRS Website:
http://doh.pa.gov/edrs

Toll-Free EDRS Hotline:
844-228-3516 (select option 6)

NOTE: This phone number is for EDRS-specific issues only, not general local registrar issues.