EDRS Project Team

EDRS
Use Case Specification:
EDRS_UC_002_Create_a_Case - FH

Version 2.7

Revision History

Date	Version	Description	Author
1/21/03	1.0	Original	Les Lewis
1/22/03	1.1	Completed Use Case Basic System Flow	Les Lewis
1/28/03	1.2	Updated Actors associated with Use Case	Donn Olsen
1/28/03	1.3	Refined Use Case to only the scenario of starting a new Case. Remaining portions of scenario included in new Use Cases.	Donn Olsen
2/16/03	1.4	Added the setting of the Funeral_Director_Ownership_Flag to On	Donn Olsen
3/20/03	2.0	Expanded Use Case (including the integration of 030 Start Case Medical Certifier)	Donn Olsen
5/16/03	2.1	Modified based upon Florida Analysis Meeting	Donn Olsen
7/29/03	2.2	Modified based upon Atlanta Analysis Meeting	Donn Olsen
8/20/03	2.3	Modified based on post-Atlanta Review	Abe Grund
9/12/03	2.3.1	Modified based on post-Atlanta Review + comments	Abe Grund
10/06/03	2.3.2	Based on 'Structured Walkthrough' comments	Kumar Batra
10/09/03	2.4	Updated based on comments from Core Death Team.	Kumar Batra
10/20/03	2.5	Updated based on Cathy's comments. Use case name change (from EDRS_UC_002_Start_Case – FH to EDRS_UC_002_Create_a_Case – FH)	Kumar Batra
12/17/03	2.6	Updated based on review comments from EDRS Core Team	Kumar Batra
01/08/04	2.7	Minor modifications. UC name updated	Kumar Batra

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Use Case Specification: EDRS_UC_002_Create_a_Case - FH

1. EDRS_UC_002_Create_a_Case – FH

1.1 Brief Description

This use case describes the process of creating a case within the EDRS for the Funeral Home user. This use case takes care of the scenario when the case has already been created by this funeral home or by a Medical Facility or Medical Certifier or ME/Coroner.

In the most common scenario, the case is created at the Funeral Home, the Funeral Director signs the 'Personal Information Section' and the MC or ME/Coroner certifies the 'Medical Information Section'. The Funeral Home owns the case.

The MC or ME/Coroner may also create a case but only complete and certify the 'Medical Information Section' (See Use Case: 'EDRS_UC_002_Create_a_Case – MC'). These cases are 'Unowned'. A case may also be 'Unowned' in a scenario when a FH creates a case and then 'relinquishes' it (See Use Case: 'EDRS_UC_004_Relinquish_Case'). An 'Unowned' Case can be picked up and owned by any FH in that jurisdiction. The Funeral Director in that FH signs the 'Personal Information Section' on that case.

In case of an unclaimed body, the MC/ME/Coroner at a Medical Facility may create a case and both sign the 'Personal Information Section' and certify the 'Medical Information Section'. (See Use Case: 'EDRS_UC_002_Create_a_Case – MC')

Once the case is signed and certified the case is automatically submitted to the jurisdiction for registration.

2. Actor(s)

2.1 Funeral Director

2.2 Funeral Home Clerk

3. Pre-Conditions

3.1 The actor has 'Case Identification data' to create a case.

4. Flow of Events

4.1 Basic Flow

	Actor	System
1.	Select option to 'Create a Case'.	Display Screen to 'Create a Case'.

2.	Enter 'Case Identification data' and select to Search.	Search for already created cases. *The system searches for the cases created and owned by this FH and all the 'Unowned' cases in the jurisdiction.* *If no cases are found the system continues to Step 3.* *See Alternate flows 4.2.1, 4.2.2, and 4.2.3 for other scenarios.*
3.		(*No cases found – the case has not yet been created at this FH or by any MC or ME/Coroner in the jurisdiction*) Save the Case.
4.		Assign Internal System ID.
5.		Set the owner of the case to the FH of the logged in user.
6.		Update event log.
7.		Display screen to enter the data in the 'Personal Information' section.
8.	Enter data in the 'Personal Information Section'.	Perform field and cross-field edits (See Use Case: MVRS_UC_014_Perform_Edit). *The edits would be performed on the fields only if data is entered into the field. Similarly a cross-field edit would only be performed when data in both the fields involved in the cross-field edit is entered.*
9.		If key data elements are entered – Enable 'Verify SSN' option. Else – Proceed to Step 11.
10.	Select option 'Verify SSN'. *This is an optional step. The actor may or may-not verify the SSN at this point. See SR 6.2 also.*	Invoke 'EDRS_UC_015_Social_Security_Number_Verification' Use Case. *The use case describes the process of SSN verification through the services of software from the Social Security Administration. This is an important capability of the EDRS, as it will greatly enhance the quality control and integrity of the SSN processing associated with Death Certificates.* *Based on the outcome of the Use Case, an indicator will be set on the case.*

11.		If all edits passed successfully, display options 'Sign Now', 'Ready to be signed' and 'Save' (as pending). If one or more fields have out-of-range values accepted by the actor, display options 'Sign Now – with exceptions', 'Ready to be signed with exceptions' and 'Save' (as pending). If one or more edits is skipped or the case has incomplete required fields, display option 'Save' (as pending). *The actor would select one of the options displayed by the system.* *The Actor always has the 'Save' (as Pending) option available.* *The actor can use the 'EDRS_UC_065_Update_a_Case – FH' to add/update information on the 'Pending' cases.*
12.	Select option – 'Ready to be signed' or 'Ready to be signed with exceptions'. *See Alt Flow 4.2.7 for the scenario when the actor selects the option 'Sign Now' or 'Sign Now with exceptions'.* *See Alt Flow 4.2.8 for the scenario when the actor selects the option to 'Save' (as Pending).*	Set status of the 'Personal Information Section' on the case to - 'Ready to be signed' or 'Ready to be signed with exceptions' as applicable. *The case is added to the list of 'Ready to be signed' cases or 'Ready to be signed with exceptions' cases for the Funeral Director to sign. (See Use Case: 'EDRS_UC_62_Sign_Case').*
13.		Update event log.
14.		Display message – "Do you wish to assign a Medical Certifier to this Case? (Y/N)".
15.	Select option – 'Yes'.	Invoke Use Case: EDRS_UC_008_Request_for_Medical_Certification.
16.		Exit.

4.2 Alternate Flow(s)

4.2.1 Exact one matching case, owned by FH of logged in user, found in Basic Flow Step 2.

	Actor	**System**
2.A		*(The system finds one exact matching case and it is owned by this FH.)* Display options – 'Continue with this Case', 'Create a new Case' and 'Exit' (without creating any case). *The actor would be able to choose one of the options that are displayed.*

2A.1	Select option – 'Continue with this case'. *The actor selects this option if he/she wishes to work on the created case.* *See Alt Flow 4.2.5 for the scenario when the actor selects to 'Create a new Case'.* *See Alt Flow 4.2.6 for the scenario when the actor select to 'Exit'.*	Go to Basic Flow Step 7.

4.2.2 Exact one 'Unowned' matching case found in Basic Flow Step 2.

	Actor	**System**
2.B		Display Case information and options - 'Accept unowned case', 'Create a new Case', 'Exit' (without creating any Case)
2B.1	Review information on the 'Unowned' Case.	
2B.2	Select option – 'Accept unowned case'. *See Alt Flow 4.2.5 for the scenario when the actor selects to 'Create a new Case'.* *See Alt Flow 4.2.6 for the scenario when the actor select to 'Exit'.*	Set the owner of the case to the FH of the logged in user. *The case is no longer 'Unowned'. The logged in user now owns the case and is responsible to complete and sign the 'Personal Information' section on the case.*
2B.3		Update event log.
2B.4		Go to Basic Flow Step 7.

4.2.3 More than one cases found in Basic Flow Step 2

	Actor	**System**
2.C		*(The system finds more than one matching cases based on the Case Identification Data.)* Display the list of cases found. The system would display enough information about the cases in the list so that the actor can perform one of the following: - select an 'unowned' case and accept it - select an 'owned' case and work on it - select option 'Create a new case' - select option 'Exit' (without creating a case)

2C.1	Select an 'Unowned' case from the list option to 'Accept unowned Case'. *See Alt Flow 4.2.4 for the scenario when the actor selects an 'owned' case and work on it.* *See Alt Flow 4.2.5 for the scenario when the actor selects to 'Create a new Case'.* *See Alt Flow 4.2.6 for the scenario when the actor select to 'Exit'.*	Set the owner of the case to the FH of the logged in user. *The case is no longer 'Unowned'. The logged in user now owns the case and is responsible to complete and sign the 'Personal Information' section on the case.*
2C.2		Update event log.
2C.3		Go to Basic Flow Step 7.

4.2.4 Actor selects to work on an 'owned' case and work on it in Alt Flow 4.2.3 Step 2C.1

	Actor	**System**
2C.1A	Select an 'owned' case and option to work on it.	Go to Basic Flow Step 7.

4.2.5 Actor selects 'Create a new Case' in Alt Flow 4.2.1 Step 2A.1 or Alt Flow 4.2.2 Step 2B.1 or Alt Flow 4.2.3 Step 2C.1

	Actor	**System**
2A.1A 2B.1A 2C.1A	Select option – 'Create a new Case'.	Go to Basic Flow Step 3.

4.2.6 Actor selects 'Exit' in Alt Flow 4.2.1 Step 2A.1 or Alt Flow 4.2.2 Step 2B.1 or Alt Flow 4.2.3 Step 2C.1

	Actor	**System**
2A.1B 2B.1B 2C.1B	Select option – 'Exit' (without creating any case).	Exit.

4.2.7 Actor selects 'Sign Now' or 'Sign Now – with exceptions' in Basic Flow Step 11.

	Actor	**System**
11.A	Select option – 'Sign Now' or 'Sign Now – with exceptions'.	Invoke EDRS_UC_009_Sign_Personal_Information Use Case.
11A.1		Save Case information.
11A.2		Go to Basic Flow Step 14.

4.2.8 Actor selects 'Save' (as Pending) in Basic Flow Step 11

	Actor	**System**

11.B	Select option – 'Save' (as Pending).	Set the status of 'Personal Information Section' on the Case to 'Pending'. *The case is added to the list of 'Pending' cases for the actor to add/update more information to it later, when it is available. (See Use Case: 'EDRS_UC_065_Update_a_Case – FH'.)*
11B.1		Update event log.
11B.2		Go to Basic Flow Step 14.

4.2.9 Actor selects 'No' in Basic Flow Step 15

	Actor	**System**
15.A	Select option – 'No'.	Exit.

5. Post-Conditions

5.1 New Death Certificate Case exists in the system and the 'Personal Information Section' on the Cases is in 'Ready to be signed' or 'Ready to be signed with exceptions' status.

5.2 A MC is assigned to the case.

5.3 An existing 'unowned' case is owned by the logged in user. (Alt Flow 4.2.2 or Alt Flow 4.2.3)

5.4 The 'Personal Information Section' on the new Death Certificate case is 'Signed' or 'Signed with exceptions'. (Alt Flow 4.2.7)

5.5 The 'Personal Information Section' on the new Death Certificate case exists in the system in 'Pending' status. (Alt Flow 4.2.8)

5.6 Updated event log

6. Special Requirements / Business Rules

6.1 Case may be dropped-to-paper.

From this point onward the user has the option to drop the case to paper. Once the case is dropped to paper, the case is locked by the system. The case may be unlocked by the Registrar.

6.2 Data elements and edits must conform to NCHS guidelines.

6.3 OVS functional specifications will determine the SSN return code and others.

6.4 Rights for all updates of fields have been determined by Profile settings.

6.5 Verify SSN before signing.

If SSN is provided, its verification must be attempted before signing. If key SSN verification data elements change, SSN verification must be re-done.

6.6 Send notification to medical institution.

Some jurisdictions may choose to send a notification to the medical institution if a) The medical institution has created the case and b) the funeral home has changed the name (or, if the medical institution had entered SSN, if the SSN has changed).

6.7 On 'unowned' cases some fields (jurisdictionally defined), may be over-ridden by the FH.

Jurisdictions would identify the data fields which are entered by the Medical Facility to create a case and which are used by the FH to search for 'unowned' cases. These fields would be part of the 'Personal Information Section' of the case, so may be overridden by the FH after it accepts its ownership.

7. Data

7.1 Personal Information Section on the Death Certificate Case

7.2 NAPHSIS section 5.6.2 (Information for unique key fields)

The EDRS National Model will propose a standard for uniquely identifying possible duplicates of a Death Certificate.

7.3 Funeral Home information

7.4 Activity History of the case

7.5 Event log entry