EDRS Troubleshooting Guide – Frequently Asked Questions (FAQs)

This Troubleshooting Guide answers questions frequently asked by EDRS users and prospective users during training sessions, EDRS implementation meetings, and when seeking technical support from the EDRS Call Center. The questions are organized into the topic categories listed below. Click a topic link here to jump to that category of questions, or scroll down to view all questions and answers.

Links to topic categories:

Questions about Accessing EDRS and the Health Commerce System (HCS)

Case Management and Work Flow Questions

Medical Information Questions

Personal Information and Disposition Questions

Registration Questions

For complete instructions for using EDRS, see the *EDRS User Manual*, video tutorials, procedures, and reference guides available on the EDRS website located at http://www.health.ny.gov/vital_records/edrs.

Questions about Accessing EDRS and HCS

HOW DO I ACCESS EDRS?

Access to EDRS is through the New York State, Department of Health (DOH) Health Commerce System (HCS). You need to request an individual HCS account, your office/facility needs to be set up in HCS, and your affiliated offices' HCS Coordinator to grant access to EDRS by assigning you an EDRS role at the office/facility.

If you already have an HCS account, contact your HCS Coordinator to request the appropriate EDRS role assignment based on your job responsibility within the facility.

After you have an active HCS account you will use an internet browser application to go to the HCS log-in page. Preferred internet browsers are Microsoft Internet Explorer version 11 or newer, Microsoft Edge, Google Chrome (current version), or Apple Safari (current version).

HCS log-in page: https://commerce.health.state.ny.us

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HOW DO I GET AN HCS USER ID?

Most users can request an HCS account online, through the HCS Login page at https://commerce.health.state.ny.us/public/hcs_login.html, using the appropriate link (*Licensed Medical Professional* or *Other User*) at the bottom of the main window on that screen.

You can also check with your organization's HCS Coordinator. Once you have an HCS ID, it is highly recommended that you select "Enable Forgotten Password," under *My Content* on the *HCS Home page*, after your account is created. This link directs you to complete your security questions if not done at the time of the account request.

I JUST RECEIVED MY HCS USER ID. WHAT SHOULD I DO NOW?

You need to activate your HCS account. Detailed instructions are outlined in the following document: HCS/EDRS Procedure: Activating Your HCS Account.

MY HCS PASSWORD EXPIRED. WHAT DO I DO?

The lapse in accessing HCS will determine how you reset your HCS password:

- If you had a temporary PIN from initial account establishment, you need to log into HCS within 20 days of issuance. If 20 days have lapsed without HCS access to manually create a personal password, you need to contact the Commerce Account Management Unit (CAMU) at 1-866-529-1890 or camu@its.ny.gov.
- Your HCS password has simply expired after the 90 day duration, you will be prompted to change your password the next time you log into HCS. On the HCS Log In page (https://commerce.health.state.ny.us/public/hcs_login.html), scroll down to the lower section of the page, and click the link "**Forgot your password?".** It is recommended to give yourself a reminder at the 60-75 day mark in a 90 day window to change your password before it expires.

WHAT IF MY HCS ACCOUNT IS INACTIVE?

HCS accounts remain active as long as you access the system at least once over a two year period. After two years of inactivity, your account becomes inactive. Contact the Commerce Account Management Unit (CAMU) at 1-866-529-1890 or camu@its.ny.gov to reinstate your account.

WHY DO I NEED AN HCS ACCOUNT TO ACCESS EDRS AND MAINTAIN YET ANOTHER PASSWORD?

The Health Commerce System (HCS) is a secure portal with extensive security protocols because there are over 270 mission critical applications housed within it. The benefit for NYS providers is this portal links to many health related applications used in the course of daily job duties. You do not need another password for EDRS within HCS, due to the single sign-on capabilities.

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I'M OUR ORGANIZATION'S HCS COORDINATOR. WHAT DOES THAT MEAN?

As an HCS Coordinator, you are responsible to approve user account requests for people affiliated with your organization by verifying identity and completing an electronic request form. Once approved, you also assign all appropriate roles in HCS to each individual. A role defines what a person has access to within EDRS. If you need assistance with your HCS responsibilities, after logging into HCS, go to *My Documents* > *Documents by Group*, then click at the top of the window to *View All Document Groups* and select *Coordinator* > *HCS Coordinator*.

I HAVE AN HCS ACCOUNT, BUT CAN'T ACCESS EDRS. WHY?

You must be granted access to EDRS in addition to HCS. Contact your organization's HCS Coordinator to be linked to the office/facility and have an EDRS role assigned in your HCS account.

Medical practitioners in private practice who do not need to share or collaborate on EDRS cases with colleagues and staff working in the same medical practice may click **Create My Independent Medical Certifier Office** to be assigned an EDRS Medical Certifier role as an individual. If your staff and colleagues will need access to your EDRS cases, then your medical practice must be set up in HCS instead, and your EDRS role must be assigned to that office in HCS.

I HAVE AN HCS ACCOUNT AND OUR HCS COORDINATOR ASSIGNED EDRS ROLES, BUT OUR FACILITY STAFF CANNOT LOCATE ME IN EDRS TO ASSIGN TO A CASE. WHAT'S WRONG?

Chances are you have not logged into EDRS yet. You must log into EDRS in order to system-generate a profile in EDRS from your HCS account. Once this initial log in is complete, other users at your facility will be able to identify you as the Funeral Director or Medical Certifier within a case.

WHAT IF I DON'T HAVE A COMPUTER?

HCS and EDRS are both internet-based applications and therefore accessible anywhere that internet access is available. Although paper-based *Death Certificates* can still be used, eventually death registration processing in EDRS will be mandatory. Consider updating/introducing technology to your facility or office during the EDRS implementation.

DO I NEED TO HAVE A LOCAL PRINTER?

A printer is needed to generate any of the paper formats of a certificate, such as *Drop to Paper* or a *Working Copy* of the death certificate. Funeral firms must have a printer to self-print a *Burial Permit*. Local Registration offices must be able to print Vault Copies for filing and generating Certified Copies.

It is recommended that the Medical Certifier, Funeral Director, and Local Registrar/Deputy Registrar/Sub-registrar view a Working Copy of each death certificate before electronically certifying or signing to verify that all case information is correct and complete.

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I AM HAVING A PROBLEM LOGGING INTO EDRS. WHAT SHOULD I DO?

If you can't remember your HCS username or password, use the 'forgot your xxxx' features on the *HCS Log in* screen. If you are still having issues logging into the Health Commerce System (HCS), contact the Commerce Account Management Unit (CAMU) at 1-866-529-1890 or camu@its.ny.gov. If you are able to access HCS, but are having issues with EDRS access, contact the EDRS Call Center at 1-844-866-3377 or edrs@health.ny.gov.

IS EDRS COMPATIBLE WITH MAC LAPTOPS, IPADS, AND ALL TYPES OF SMART PHONES?

EDRS is compatible with pcs and Apple laptops. It is accessible with an iPad, however, some functionality may not operate as expected. At this time, EDRS is not compatible with smart phones.

WHAT HAPPENS WHEN ONE OR MORE OF THE NECESSARY PARTIES NEEDED TO COMPLETE THE DEATH CERTIFICATE DO NOT USE EDRS?

During the implementation period for EDRS it is expected that, depending on the area, there will still be fully paper certificates as well as partially electronic certificates. A partially electronic certificate would occur if the certificate is started in EDRS but other parties involved are not yet utilizing EDRS, essentially then *"dropped to paper." Drop to Paper* means the certificate was started electronically but then printed and completed as a hard copy. After a case is dropped to paper it can no longer be accessed and updated, or registered through EDRS.

> **NOTE:** If you just want to review a copy of the partially completed *Death Certificate* but continue electronic processing and filing of the case, then you should review a Working Copy.

IS EDRS SECURE?

EDRS is a secure browser-based application accessed only through the NYS Health Commerce System (HCS). Strong protocols are in place to mitigate hacking risks. In order to establish an HCS account, proof of identity is required, even before granting permissions for EDRS.

DO I NEED TO LOG OUT OF EDRS?

Yes, you should log out of EDRS for confidentiality purposes. This is especially important when accessing EDRS through a shared computer to avoid caching (when your computer remembers and reloads a website you already visited). You will be automatically timed out after a period of inactivity.

To completely log out, you need to log out of EDRS by clicking the **Log Out** button at the top of the page, and then log out of HCS by clicking **Home > Log out**.

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WHERE CAN I GET TRAINING IN HOW TO USE EDRS?

All users will receive training during EDRS implementation, so that they will be able to properly access and use the system for their role in death registration. Invitations will be sent to the appropriate offices to participate in targeted training.

Alternatively, go to the EDRS website on the NYS Department of Health site for training materials and publications to assist you immediately. You can also refer to the training schedule, posted on that webpage, for recurring virtual training sessions by role.

Training will be primarily provided via webinar (telephone conference call paired with live, computer-based presentation) and video tutorial formats and will occur prior to implementation in your county. These online training options can be viewed from your home or office through a compatible computer with internet access; webinars also require and a reliable phone, preferably with mute capability. Virtual or in-person live training allow for interaction with an EDRS trainer. In addition, select training recordings will be available for viewing at your convenience.

Case Management and Work Flow Questions

HOW DO I START A NEW CASE IN EDRS?

The majority of cases in New York State are created by a medical professional associated with the case. To create a new case, you will need to first search the EDRS database to be sure the case was not already created. To search the database sign into EDRS, and then do the following:

1. Click the *fast links* icon named Death Start/Edit New Case on your EDRS homepage, *or* click the menu path Life Events > Death > Start/Edit New Case.

2. On the Start/Edit New Case page, enter the decedent's first and last names, sex, and date of death, and then click the Search button.

3. On the search results page:

    a. If you find the case in the search results, then *click the hyperlinked name of the decedent* to open the case for editing.

    b. If you do **not** find the case in the search results *and you are certain the case has not yet been created*, then on the search results page you may click the **Start new case** button (button is labeled "**If case does not appear above, start new case**"). Then click **Create Entirely New Case**.

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NOTE: Be aware that clicking the **Start new case** button will permanently establish the new case in EDRS which cannot be deleted. Before clicking the button be sure the case does not already exist.

I WAS NOTIFIED A CASE WAS STARTED BY ANOTHER PARTY. WHEN I USE THE DEATH LOCATE FUNCTIONALITY, THE CASE DOESN'T COME UP. WHY CAN'T I FIND THE CASE?

The **Death > Locate Case** functionality only works for cases already owned by your facility. Unless you started the case in EDRS or previously accessed and took ownership of the case (ownership of the portions responsible by your role), then you must use the *Death Start/Edit New Case* the first time you access the case. Type in all the required case information received from the other EDRS user; EDRS should return a list of case(s) matching the criteria entered where you can click on the Decedent's name to access the case and take ownership.

I WAS NOTIFIED A CASE WAS STARTED BY ANOTHER PARTY. I TRIED TO FIND THE CASE AND ENDED UP STARTING ANOTHER CASE BY ACCIDENT. WHAT DO I DO?

If you started what ended up being a duplicate case, contact the EDRS team to have the duplicate case abandoned in EDRS (contact the EDRS Call Center at 1-844-866-3377 or edrs@health.ny.gov). You should find the case started by the other party and continue to work on that file.

WHY CAN'T I ACCESS A CASE THAT I KNOW IS ASSIGNED TO ME?

Security of EDRS case data is connected to both the user's role and their location (office). If you are associated with more than one office (for example, more than one medical facility or funeral firm), then when you log into EDRS, be sure to select your office where that case is affiliated. If you select a different office, then you will not be able to fully access the case.

DO I HAVE TO VALIDATE EACH PAGE AS I ENTER INFORMATION ON A CASE?

You should Validate each page after entering the data on that page. **Validate Page** saves your current changes to the EDRS database while it checks the data against system rules for expected results. Alternatively you can click **Save** on each page before moving to another page, but you will still need to go back to **Validate Page** and address any validation errors occurring throughout the case. There is no need to click **Save** on a completed page if you have already clicked **Validate Page**.

As you enter data you do not need to wait until the data on the page are complete before clicking **Validate Page**. You can validate whenever needed to save and check against system rules.

After all data in the case are complete and each page has passed Validation (any errors have been addressed or overridden), the Certifier/Signer must **Validate Page** for the *Certify* or *Sign* page to become available to them.

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HOW WILL SOMEONE KNOW THEY HAVE A DEATH CERTIFICATE WAITING FOR HIS OR HER ACTION?

Individuals involved in the death certification process should access EDRS frequently to manage their workload and adhere to the New York State requirement that all deaths be registered within 72 hours. Cases assigned can be found in Messages or Work Queues in EDRS. The system also generates emails outside of EDRS for certain EDRS transactions.

You may still want to inform others in the process via traditional means such as by telephone or email.

WHEN I AM FINISHED WITH MY WORK ON A CASE, WHAT DO I NEED TO DO TO RELEASE THE CASE SO THAT THE NEXT PERSON IN LINE CAN ACCESS IT?

You do not need to do anything extra to 'release' a case to allow it move through the work flow process. EDRS automatically moves the case through the work flow based on the completeness of data, validation, and the presence of required electronic signatures (*Certify/Sign/Affirm*).

Each case has two "owners" who can always access the case no matter what the case status is: a medical owner and a personal owner. The ownership is at the office/facility level; all EDRS users in that office/facility can access the case at all times. When a case is ready for Certification or Signing, the case status bar will indicate that requirement, and the case will automatically move into the applicable Work Queue. It is a good idea for staff users at the office/facility to also notify the Certifier/Signer through regular communication channels, such as phone, email or in person, when the case is awaiting their action.

When the case has been Certified, it does not need to advance in the work flow to go to the Funeral Director. The Funeral Director can always access the case even while the medical owner has not completed their portion.

If the Medical Certifier for a case is not directly affiliated with the office/facility that owns the case, then the medical owner (a medical facility or non-medically licensed Coroner) can share the case electronically with the non-affiliated Medical Certifier using the feature **Request Non-Affiliated Certification**. The Medical Certifier will automatically receive an email and a message inside EDRS asking them to become the Certifier of the case. They will access the case through their EDRS Messages, Accept the request, and then they can edit and Certify the case.

When a case has been both Certified and Signed, it automatically becomes available to the local Filing Registrar's Office assigned to the case. That Registrar Office assignment is made on the Disposition page in the case, and most of the time EDRS automatically assigns the Filing Registrar Office based on the Place of Death. The Registrar Office users will receive an email and a message in EDRS telling them the case is ready for their review and registration. The case is also automatically assigned to their Work Queue.

When the Local Registrar, Deputy Registrar, or Sub-registrar Affirms the case, that automatically Registers the case with New York State.

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I SEE *RELINQUISH CASE* ON THE DEATH REGISTRATION MENU. WHAT DOES THAT FEATURE DO, AND WHEN SHOULD I USE IT?

Relinquish Case removes your ownership of the case so you can no longer edit the case. Relinquish Case does NOT pass the case to the next person or role in the work flow.

Effects of Relinquish Case:

- If you have already Signed or Certified the case, and then you Relinquish the case, not only will you no longer own the case, but your Certified or Signed status and authority are also removed.
- If a Coroner or medical facility has shared the case with a non-affiliated Medical Certifier (using Request Non-Affiliated Certification), then if you Relinquish Case you will also be removing the non-affiliated Medical Certifier from the case.
- If you are an ME or Coroner and you Relinquish Case, you will still be able to access the case using Start/Edit New Case to search for it, but you will not be able to edit or certify the case unless you reclaim ownership of the case.
- A case that has been Relinquished is now missing one of the case owners, and therefore it cannot be Registered.

When is Relinquish Case Appropriate to Use?

ME/Coroner – The only time you would use Relinquish Case is if you own a case, and then decide that you do not need to be a Certifier on that case, and you wish to make it available for a Primary Care Physician or medical facility to take ownership of the case. This would only happen if the manner of death is Natural.

Medical Certifier or staff user at a medical facility or medical practice – If you created the case while signed into the wrong office/facility. You can use Relinquish Case to release the office's ownership of the case, then change office and sign into the correct office/facility. Then search for the case using Start/Edit New Case, click the link on the Decedent's name and then click OK to accept ownership of the case.

Funeral Director or funeral firm staff – If you claimed ownership of a case while signed into the wrong office, or if your firm owned the case initially but the family of the decedent has decided to change to a different funeral firm. In that case you would Relinquish Case to release the firm's current ownership of the case, so that you or an appropriate user signed into the other firm can search for the case using Start/Edit New Case, and claim ownership of the case.

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HOW WILL EDRS DETERMINE THE APPROPRIATE CITY, TOWN, OR VILLAGE IN WHICH A DEATH CERTIFICATE SHOULD BE FILED?

EDRS includes "New York State Places" table that assists with proper recording of locality and assignment of recorded district based on the place of death. The "places" table is a listing of New York State municipalities such as villages, towns and cities and their corresponding FIPS (geo-) codes. There may be times when EDRS selects an incorrect registration district. This could generally happen if the municipality has an overlapping or split jurisdiction. The filing registrar information can be corrected on the Disposition page in EDRS, if necessary. The Funeral Director (or ME/Coroner when they are responsible for Personal Information) should make every attempt to confirm the correct jurisdiction before signing the case.

WHO HAS THE ULTIMATE RESPONSIBILITY FOR GETTING A DEATH CERTIFICATE FILED IF A CASE HAS BEEN STARTED IN EDRS BUT HAS NOT MOVED?

The Funeral Director has primary responsibility to ensure a case is filed within 72 hours of the death event, per Public Health Law §4140. If a funeral firm is not engaged, the ME/Coroner has the ability to complete the personal information and a Public Administrator will most likely be assigned to the case.

If all parties involved in the process remain diligent to complete his or her tasks it is not an arduous process; keeping filing time to a minimum and improving the quality and timeliness of the data collected.

HOW WILL CORRECTIONS TO DEATH CERTIFICATES BE HANDLED?

If there is information unknown at the onset of a case, but data collection can be ongoing, while keeping the case registration within the 72 hour window, you should wait to sign or certify until after that information is gathered and entered into EDRS. Changes can be made on the EDRS case any time prior to registration. Be aware that once a case is signed and certified, EDRS automatically notifies the Local Registrar it is ready for review and registration. It is possible to register a case with unknown information; enter "Unknown" or "Pending Investigation" in the necessary fields. In this case, corrections will be needed when the information is gathered.

Death certificates fully completed and registered in EDRS that need corrections will be corrected using the paper-based process established prior to EDRS implementation.

I PRINTED THE DEATH CERTIFICATE AND THE INFORMATION ON THE TOP AND BOTTOM IS CUT OFF. HOW DO I FIX THIS?

This issue could be caused by the default print settings by individual user and machine, especially if using Google Chrome's default PDF viewer. These settings are generally not retained in the printer settings and can become disabled if there are software updates or multiple users access EDRS from the same machine.

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- When you open the print window, check that the 'fit to page' or 'shrink to page' option is selected before printing.
- If the 'fit to page' or 'shrink to page' option was already selected, uncheck the box and recheck. This will reset the print option.

It is highly recommended to use the Print Preview option if available prior to printing the *Death Certificate* or *Burial Permit*.

WHAT IS "DROP TO PAPER"?

Drop to Paper is a function on the Print Forms page which makes a major change in the case's electronic processing. Drop to Paper ends all further electronic processing of the case and changes the remainder of case processing to being completed on paper. When the user clicks the link to "Drop to Paper", they will be asked to confirm that they want to proceed with the change. If yes, then it prints-out one official, partially completed Death Certificate that must be routed through the registration process as though it were an original triplicate paper form of the certificate.

The Drop to Paper function is only available after the case has been medically certified, and a funeral firm does not have ownership of the case.

Drop to Paper should only be used if the Funeral Director or Local Registrar are not yet set up in EDRS for electronic case processing.

If a case was inadvertently Dropped to Paper, the NYS EDRS team now has the ability to reverse (cancel) Dropped to Paper status, returning the case to electronic processing if the funeral firm and the local registration office are both able to process the case electronically.

I "DROPPED TO PAPER," BUT MY PRINTER JAMMED/DIDN'T PRINT. HOW CAN I REPRINT THE CERTIFICATE?

Contact the EDRS team to have the Drop to Paper option re-enabled (contact the EDRS Call Center at 1-844-866-EDRS (3377) or send an email to the EDRS team at edrs@health.ny.gov). This will allow to reprint the dropped to paper certificate. Note: You will not be able to edit the case.

IF A CASE IS "DROPPED TO PAPER," HOW WILL I BE NOTIFIED?

Regardless of an electronic case or a case Dropped to Paper, the originator of the case should use any and all methods of communication with others involved in the process. Telephone, email or other communications used pre-EDRS should still be utilized.

WHY CAN'T I ACCESS A CASE THAT WAS "DROPPED TO PAPER"?

A case that has been Dropped to Paper is no longer an electronic case. Drop to Paper ends all further electronic processing of the case and changes the remainder of case processing to being completed on

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the "Dropped to Paper" print-out of the partially completed *Death Certificate*. If the medical practitioner has dropped the case to paper, the medical practitioner is expected to provide the Funeral Director with the one Drop to Paper print-out for them and the Local Registrar to complete the *Death Certificate* and registration process on that printed paper certificate.

If you believe the case was inadvertently Dropped to Paper, the NYS EDRS team now has the ability to reverse (cancel) Dropped to Paper status, returning the case to electronic processing if both the funeral firm and the local registration office are able to process the case electronically.

Medical Information Questions

WHAT IS ENTERED FOR DECEDENT INFORMATION IF A BODY IS NOT IDENTIFIED?

If a body is found and unidentified, it still needs to be registered within the 72 hours. In EDRS, enter the decedent name as "Unknown".

For any fields with unknown information, enter or select "Unknown" for that field.

WHAT IS ENTERED IF THE EXACT DATE AND TIME OF DEATH ARE UNKNOWN?

The *date of death*, if unknown due to an unattended death, should be entered as the date the human body was found until further investigation is made. If the exact *time of death* is unknown, the time should be approximated by the person who pronounces the body dead. EDRS has a time modifier field to indicate approximate or other disclaimers. However, '99:99" can be entered pending investigation.

The case will be assigned a case number within your jurisdiction and only viewable by you. Make any corrections to the unknown or approximated fields, after any examinations or testing and before the case is certified.

For any fields with unknown information, enter or select "Unknown" for that field.

DOES EDRS PREVENT A MEDICAL FACILITY FROM MEDICALLY CERTIFYING A DEATH UNNATURAL CAUSES?

If the Manner of Death is anything other than 'natural,' EDRS requires that an ME or Coroner be a certifier in the case. If the case is not already owned by an ME/Coroner, the medical facility user working in the case at the time will see a message advising that the case be referred to an ME/Coroner.

If an non-natural death case is currently owned by a medical office/facility, they should use the Refer to Medical Examiner feature to transfer the case to a Medical Examiner/Coroner. Alternatively, the Medical Examiner/Coroner can search for the case using Start/Edit New Case feature, and then take ownership away from the medical office/facility using the ME Review Case feature to Take Control of Case.

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A non-medically licensed Coroner who owns a case may use the Request Non-Affiliated Certification feature to share the case with any Medical Certifier who is not directly affiliated with the Coroner's office. In that situation the non-medically licensed Coroner will Coroner Certify the case while the external/non-affiliated certifier Medically Certifies the case.

IF A PROVIDER CERTIFIES THE DEATH, BUT THEN THE FACILITY STAFF REALIZE THAT THERE IS AN ERROR, DOES THE SAME CERTIFIER HAVE TO 'UNCERTIFY' THE CASE IN ORDER TO CORRECT THE CASE INFORMATION?

Any Medical Certifier at the same facility can Uncertify and make changes in a case. If someone other than the attending physician is going to medically certify the case now, then then Certifier type should be changed to 'Physician Acting on behalf of Attending Physician." The new certifier's information should be entered into the Certifier section of the Certify page.

I TYPED IN THE PHYSICIAN INFORMATION ON THE CERTIFIER PAGE, BUT THE PHYSICIAN CANNOT SIGN THE CASE. WHY?

You cannot free-type in this information. The Medical Certifier information on the *Certifier* page must be matched to the EDRS database. First erase the data using the pencil icon. Next either type in the medical license number and click the arrow button to the right of the field, or click on the *Lookup Tool* (magnifying glass icon) and search for and select the physician by name. In the Lookup Tool use the wildcard character (%) to help locate the physician by typing the first three letters of the physician's name followed by %.

I CAN'T FIND A SPECIFIC CERTIFIER WHEN I TYPE IN THE CERTIFIER'S MEDICAL LICENSE INFORMATION OR BY ENTERING THEIR NAME IN LOOK-UP TOOL. WHAT IS WRONG?

If the certifier cannot be found in the EDRS database, chances are she/he has not logged into EDRS yet, establishing a profile from her/his Health Commerce System (HCS) account. Have the certifier log into EDRS and then try to add her/him to the case.

AS A NON-MEDICALLY LICENSED CORONER, I AM USING THE REQUEST NON-AFFILIATED CERTIFICATION FEATURE TO ADD A MEDICAL CERTIFIER TO A CASE. I CAN'T FIND THE SPECIFIC CERTIFIER USING THE LOOKUP TOOL.

If the Medical Certifier cannot be found in the EDRS database, it is likely that they have not signed into EDRS yet, which establishes their profile from their Health Commerce System (HCS) account. Have the Medical Certifier log into EDRS and then try to add them to the case. If the Medical Certifier does not already have an EDRS role assigned at a medical office/facility and they do not need to share cases with other colleagues and staff in a medical office, then after they have signed into EDRS they can create an Independent Medical Certifier 'Office' which is their office that you will select when you Request Non-Affiliated Certification.

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HOW ARE INCOMPLETE CASES MONITORED IN EDRS?

Cases incomplete in EDRS will be listed in the work queues by category at the facility level, meaning anyone at the facility can see the case requires action. For example, a case where fact of death information is still missing would be in the Medical Pending queue. If all the information is entered and validated but not certified, the case would be in the Certification Required queue.

EDRS also generates internal notifications and external emails to all appropriate roles within a facility, which appear on the Messages list. For instance, if a funeral firm changes the decedent name on an EDRS case, everyone at the medical facility where the death took place would get a message. For this reason, NYS DOH has opted to limit the number of messages turned on in EDRS. Therefore, it is highly recommended to frequently review the *Registration Work Queue Summary*.

WHEN DOES A CASE NEED TO BE REFERRED TO A MEDICAL EXAMINER/CORONER?

Any death NOT from natural causes needs to be referred to and certified by an ME/Coroner. In many jurisdictions, all unattended deaths are also required to be certified by an ME/Coroner, even when the manner of death is determined to be from natural causes.

WHAT SHOULD I DO IF A FUNERAL FIRM IS NOT INVOLVED WITH THE DECEDENT?

Medical Certifiers must still Certify the death and proceed with Registering the case even if a funeral firm is engaged in the process and disposition is delayed. In that case, the medical facility or ME/Coroner must file for a **Hold Permit** from the Local Registrar.

Examples scenarios of when a funeral firm may not yet be involved in a case include:

- If the decedent's next of kin is unknown at this time
- If the decedent is an unidentified body
- If the circumstances of the death are under investigation.

If next of kin has not been established to claim a body, a Public Administrator may be assigned the case; the Public Administrator will engage a funeral firm.

If the case is owned by an ME/Coroner, they may choose to be responsible for gathering and completing the decedent's personal information in order for the case to be completed and Registered.

Alternatively, a medical facility or ME/Coroner can use the **Drop to Paper** feature after the case has been Medically Certified (and Coroner Certified, if applicable), which allows the case to be registered on paper without funeral firm information and with Method of Disposition entered as Hold.

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I ENTERED THE CAUSE OF DEATH INFORMATION AND GET AN ERROR MESSAGE IN EDRS. WHY?

EDRS *Cause of Death* page functionality is designed to replicate the National Center for Health Statistics (NCHS) Recommendations for Entry of Cause of Death. The chain of events should show all etiology, starting with the leading cause listed on line a followed by all sequentially occurring conditions. Use of certain trauma terms may trigger rules indicating an ME/Coroner is required to certify the case. Check that the Manner of Death and Cause of Death correspond.

Please note that abbreviations are not allowed, as the data is used for statistical purposes.

WHY IS THERE AN INJURY PAGE IN SOME CASES AND NOT IN OTHER CASES?

The *Injury* page is triggered when the Manner of Death selected on the *Pronouncement* page is something other than '*natural*.' EDRS assumes the death occurred due to some type of injury, and as such the details of the injury should be reported on within the EDRS case.

If the Manner of Death selected was '*natural*,' or changed from some other Manner of Death to '*natural*,' the *Injury* page is not required and therefore does not appear or disappears. Any information entered on the Injury page before the Manner of Death was changed to 'natural' remains saved in the case.

HOW DO I ENTER AN UNKNOWN OR APPROXIMATE TIME OF DEATH?

According to the Center for Disease Control (CDC) guidelines, if the exact time of death is unknown, you should enter the time as close to when you think the death occurred as possible. EDRS does provide a time modifier field to the right of the time of death field, allowing you to select approximate or another disclaimer setting to the time on the case. The Time of Death can be updated after further investigation if it can be determined within the 72 filing window and before the case is registered by the Local Registrar.

I WAS REFERRED A CASE, BUT WHEN I ACCESS IT IN EDRS, I CANNOT EDIT ANY FIELDS. WHAT HAPPENED?

If the case was referred to you through **Refer to Medical Examiner**, then to edit the case you need to "Accept" the referral using the *ME Review Case* screen. After you Accept this type of referral, your office will become the owner of the case, and you and colleagues/staff in your office will be able to edit the case fields.

If the case was received as a *Request for Non-Affiliated Certification*, then to edit the case you need to "Accept" the request using *Non-Affiliated Certification Request Review* screen. After you Accept this type of request, then case ownership will remain with the office which requested your participation on the case, but you will be able to edit the case fields in EDRS.

ME/Coroners also have an option to "take control of" a case without needing a referral in EDRS. This can also be done on the *ME Review Case* screen. When you select Take control of case, case ownership transfers to you. In most cases, the prior owner will no longer be able to access the case.

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HOW DO I COMPLETE THE PERSONAL INFORMATION FOR A DECEDENT WHEN A FUNERAL FIRM IS NOT ENGAGED?

If a funeral firm is not engaged, and a Medical Examiner or Coroner is responsible for the case, then the ME/Coroner can use the question located at the top of the **Decedent** page to indicate that the ME/Coroner will be responsible for the personal information in the case. When the answer selected for this question is 'Yes', all *Personal Information* screens become available to the ME/Coroner.

If an ME/Coroner is not involved in the case, or if the case is under investigation by an ME/Coroner, then a medical facility or an ME/Coroner has the option to use the **Drop to Paper** feature after completing the medical information and required Certification, **Drop to Paper** stops all electronic processing of the case and converts it to a paper-based death certificate using the **Drop to Paper** print-out as the official certificate that will be signed and registered. When using the **Drop to Paper** print-out as the official death certificate when a funeral firm is not engaged, you should manually enter any personal information that is known, and enter the interim **Method of Disposition**. Then deliver the **Drop to Paper** print out to the Local Registrar to complete registration and obtain a Hold, Transfer, or Donation permit, as applicable.

In most cases, when no next of kin is identified or the next of kin has not agreed to take ownership of the body, a Public Administrator is assigned to the case and would then work with a contracted funeral firm to take responsibility for the personal information. If this occurs before the case has been Dropped to Paper, then the contracted funeral firm can complete the case electronically in EDRS. If the Public Administrator's funeral firm is assigned to the case after the case has already been Dropped to Paper, then the funeral firm will need to submit a Correction/Amendment to complete the personal and disposition information on the death certificate.

Personal Information and Disposition Questions

WILL THE SOCIAL SECURITY NUMBER (SSN) BE DIRECTLY LINKED TO THE SOCIAL SECURITY ADMINISTRATION?

Social Security Number (SSN) information is verified two ways in EDRS.

1. EDRS validates that the decedent's SSN is not also used in another case in the EDRS database. If another case exists in the EDRS database containing the same SSN, when you Validate you will receive an error message advising you that there may be a duplicate case for the same decedent.

2. On the **Decedent** page in EDRS, Funeral Directors have a **Verify SSN** link, which verifies the SSN and other key identity information directly with the Social Security Administration. Funeral Directors are *required* to attempt to **Verify SSN**. The Social Security Administration's system will return a verification result. If the verification result is PASSED, then the Funeral Director does not need to submit form SSA-721 – but only if the verification result is PASSED. Complete instructions and information about SSN verification results are available on the EDRS website Funeral Directors page: https://www.health.ny.gov/vital_records/edrs/funeral.htm. On the website see *EDRS Procedure: Verifying the Decedent's Social Security Number in EDRS* (PDF

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Publication), and also see *Verifying the Decedent's Social Security Number in EDRS* (Video Tutorial).

WHAT IF THE BURIAL OR OTHER DISPOSITION IS ON HOLD?

When the *Death Certificate* is filed, the Funeral Director would print a *Burial Permit* to hold the body until they are ready to proceed with disposition. At the point when burial or other disposition can proceed, the funeral firm must request a correction through the usual paper-based process to change the disposition on the *Death Certificate*.

I TYPED IN THE FUNERAL DIRECTOR INFORMATION ON THE DISPOSITION PAGE, BUT THE FUNERAL DIRECTOR CANNOT SIGN THE CASE. WHY?

You cannot free-type in this information. The *Funeral Director* and *Funeral Firm* information on the *Disposition* page must be matched to those entities in the EDRS database. To be sure they match the EDRS database, the information should be system-filled or searched and selected rather than typed in. First erase the typed-in data by clicking the pencil eraser icon. Next, either type in the Funeral Director License number and click the autofill icon (arrow button) to the right of the field, or click on the *Lookup Tool* (magnifying glass icon) and search for and select the Funeral Director by name. Be sure to Validate the page after making changes.

DO THE OWNERS OF THE PLACE OF FINAL DISPOSITION HAVE ACCESS TO EDRS?

At this time the system is designed to print the *Burial Permit* to be submitted to cemeteries, crematories and other similar facilities. Automating this process and including users from these locations can be considered for a future enhancement.

WHAT IF THE DECEDENT IS BEING CREMATED? CAN I STILL GET CREMATION CLEARANCE, IF REQUIRED IN MY COUNTY?

Cremation Clearance is required in some counties/registration districts. Cremation Clearance is currently being handled outside of EDRS using the process previously established in the associated registration district.

In EDRS when the Method of Disposition is Cremation, validating the page will result in two validation error messages related to Cremation Clearance: one for requesting clearance, and the other for approval. Override the two error messages by clicking in the *Override* checkbox for the error message, click *Save Overrides*, and then revalidate the page.

For cases in a registration district that requires Cremation Clearance, then after obtaining Cremation Clearance outside of EDRS, document the offline approval in a *Comment* in the EDRS case. *Comments* are located under *Other Links* in the *Death Registration Menu*.

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After overriding the error messages, final case status will include Personal Valid with Exceptions. The page will still be marked with a yellow dot on the Death Registration Menu because of the Overrides, the overridden error messages will remain on the Disposition page, and the Method of Disposition field will remain yellow. The case may be registered with these markings.

WHAT IF THE BODY IS BEING BURIED OUT OF THE AREA?

If the body is being transported out of New York State, the Funeral Director should consult with the Local Registrar, NYS or Federal Department of State, or the embassy/consulate of the receiving country to determine and comply with that jurisdiction's regulations.

CAN I PAY MY BURIAL TRANSIT FEE THROUGH EDRS?

Online payment through EDRS is a future enhancement. Burial transit fees will remain as payment by check to the NYS Department of Health, Bureau of Vital Records via mail until this online payment functionality is established.

HOW DO I ORDER COPIES OF THE OFFICIAL DEATH CERTIFICATE?

Copies of the official *Death Certificate* may be requested from the Local Registrar.

Registration Questions

HOW WILL I KNOW IF I HAVE DEATH CERTIFICATES PENDING APPROVAL?

When a death certificate is submitted to a registrar's office for approval, a notification will be sent to all users within a facility on their **Messages** screen in EDRS and their **Work Queue**. It is recommended that registrar office staff check the messages or work queue in EDRS regularly throughout the day.

The case will automatically be submitted to the registrar's office when it has been both Certified and Signed.

THE FUNERAL DIRECTOR SAYS THE CASE IS READY FOR LOCAL REGISTRAR APPROVAL, BUT I DID NOT GET A MESSAGE. WHAT'S WRONG, AND CAN I STILL REGISTER THE CASE?

The most common reasons for the Local Registrar not getting a message are:

- ***The case has not yet been both Certified and Signed.***
  The Funeral Director should be able to see this in the status bar at the top of any page in the case. The case status may indicate /Medical Valid/, but farther along in the status bar is may indicate /Uncertified/. If so, then the case needs to go back to the Medical Certifier to be Certified.

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- ***The Filing Registrar Office field on the Disposition page is blank.***
  When place of death is a medical facility, the Filing Registrar Office always fills in automatically. But when place of death is outside of a medical facility, then the Filing Registrar Office will be assigned automatically if the place of death locality (city, town, or village) was selected from the Places look-up tool or selected from pop-up predictive text as the Medical Examiner/Coroner or Medical Certifier entered the place of death. If the place of death locality was typed in manually, then the Filing Registrar Office may not fill in automatically. In that case the Funeral Director will need to **Unsign** the case, begin typing the name of the Filing Registrar Office, and **select** (click on) the correct Registrar Office name when it pops up in a list of matches. When the Funeral Director selects the Filing Registrar Office, the District Number also fills in automatically. Then **Validate** the page, then **Sign** the case again. When Signed this time, a message will automatically be sent to the Local Registrar to let them know the case is ready for their review and approval.

- ***The Filing Registrar Office field on the Disposition page names a different Registrar Office.***
  If the medical owner of the case selected or entered the incorrect locality for place of death, such as Village or city instead of Town, then the case could be assigned to the wrong Registrar Office. Ideally, the Medical Certifier should **Uncertify** the case and correct the place of death locality, then **Validate** the page and **Certify** the case again. If the Medical Certifier is not available, the Funeral Director can **Unsign** the case and edit the **Filing Registrar Office** on the Disposition page, then **Sign** the case again.

  Alternatively, the current Registrar Office named on the Disposition page can edit the Filing Registrar Office field in the case while the case remains Signed. To do this, first delete the current information in the Filing Registrar Office field. Then begin typing the name of the correct Registrar Office, and select the correct office in the pop-up list of matches. When you select the office in the pop-up list, the District Number will fill in automatically. (If you don't delete the current information before starting to type in the field, you will not get the pop-up list of matches to select from.) Now **Validate** the page to save the change. The newly assigned Registrar can now access the case, but they will not receive a message. They will need to use **Death > Search** to retrieve the case.

If a Registrar or Sub-registrar does not receive a message alerting them that a case is awaiting their approval, as long as that **Filing Registrar Office** is named on the Disposition page, the Registrar can access the case using **Death > Search**, and the case should also be in your **Work Queue**. When using **Search** you need only enter one or two fields to find the case, such as the Case ID or the decedent's last name.

WILL LOCAL REGISTRATION OFFICES STILL RETAIN AND SEND IN PRINTED PAPER COPIES OF DEATH CERTIFICATES?

Yes, Registrar Office should print three (3) copies of each final, electronically signed Death Certificate – the Vault Copy. You will retain one Vault Copy in your files, send one copy to New York State, and send one to your local Health unit, marked as "Local Health Unit Copy."

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When printing any Certificate, always be sure to set your printing to **Fit to Page** or **Shrink Oversized Pages** so that the entire Death Certificate fits within the margins of your 8-1/2 x 11 printer paper.

If a case was "Dropped to Paper," then the official Death Certificate is the manually signed Drop-to-Paper print-out from EDRS. You will need to make two photocopies of the final, signed Drop-to-Paper printout, and distribute the original and each of two copies the same way you handle the three Vault Copies in a fully electronic EDRS Death Certificate. "Drop to Paper" means that the electronic case was completed by one of the data owners (medical or personal), Certified or Signed, but then the case was converted from electronic to a paper-based Certificate using the Drop to Paper feature in EDRS. Drop to Paper is only used when one of the required case owners is not able to complete the case electronically at this time. This may be appropriate when a case is pending investigation and a funeral firm is not yet involved in the case, or if disposition is proceeding but the funeral firm is not set up in EDRS.

HOW DOES THE REGISTER NUMBER GET ASSIGNED TO AN EDRS CASE?

The Local Registrar is responsible for entering the Register Number in the field on the *Identifiers* page within an EDRS case. It is the responsibility of the local office to track and maintain that local numbering. When you Validate Page, EDRS will warn you if it finds a possible duplicate number.

One recommendation, if your local office has a stamping machine or indexing system, is to print and scan the **Working Copy** of a case to identify the local register number on it before filing the case electronically with NYS. Once entered on the *Identifiers* page, the manually tracked number will appear on the **Vault Copies** which you print out from EDRS.

HOW ARE DEATH CERTIFICATES REGISTERED OUTSIDE OF OFFICE HOURS?

If a *Death Certificate* is submitted electronically to the Registrar's Office, registration of the Certificate must occur first in order to allow the Funeral Director to print a *Burial Permit*. EDRS is a web-based application that can be accessed from any computer with internet connection. Therefore, the time and location of executing the registration of the *Death Certificate* is flexible and could be utilized outside of office hours.

Each Registrar's Office will have to determine their policy for handling off-hours processing of *Death Certificates*. You are welcome to consult with the NYS DOH EDRS Implementation team for assistance when considering off-hours policies.

Off-hours Registrations may be handled off-line using a Working Copy print-out to manually sign and date the Certificate and assign a Register Number. Then on the next business day the Local Registrar or Sub-registrar can go into EDRS, enter the Register Number, Affirm the case, and then edit the Local File Date and the name of the person who issue the Burial Permit during off-hours.

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HOW WILL CORRECTIONS AND AMENDMENTS BE ENTERED INTO THE CASE IN EDRS?

After a case has been registered, the Registrar may still make updates to some of the information in EDRS. On the *Identifiers* page, the Registrar may edit the following:

- Local File Date
- Register Number
- Burial or Removal Permit Issued By

> **Note**: If the Burial Transit Permit was issued by a person who is not listed in the Look-up Tool, then their name can be typed into the appropriate fields.

After making corrections, click **Validate Page**.

Any additional corrections and amendments needed after the certificate has been registered are still being submitted using the **current local paper-based process**. (A future enhancement to EDRS is expected to include the ability to submit correction/amendment requests electronically within EDRS.)

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