Electronic Death Registration System (EDRS)

IMPLEMENTATION TOOLKIT

DEPARTMENT OF HEALTH
CERTIFICATE OF DEATH
STATE FILE NUMBER

[Image of certificate of death]

NEW YORK STATE Department of Health
BUREAU OF VITAL RECORDS
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January 5, 2017

Dear Hospital Administrator:

Welcome to the New York State Department of Health’s Electronic Death Registration System (EDRS). The Department is pleased to announce the commencement of electronic death filing in the State of New York. Pursuant to Public Health Law §4148, the Department was authorized to develop, implement, and maintain an EDRS for the purposes of electronically completing, filing, and maintaining death certificates in New York State (excluding deaths within the 5 boroughs). In order to comply with Public Health Law, EDRS will enable authorized medical professionals to complete the medical certification section of death certificates 24 hours a day through a secure online system.

This welcome pack will provide you with everything you need to know to get started using EDRS. Enclosed you will find:
- Department of Health Letter from Commissioner
- Endorsement Letter from the Center of Disease Control (CDC)
- Various EDRS System Resources
- Various Health Commerce System (HCS) Resources

The Department of Health is committed to the implementation of the Electronic Death Registration System (EDRS) and will assist your facility with its roll out. The Department has created a regional Go-Live schedule for New York State. Please review the Implementation Roll-Out Map located on the EDRS website.

This welcome pack has been designed to orient and set up staff who are involved in the death registration process at your facility. Please be aware, the materials in this packet are ‘a point in time’. For the most current materials, please visit our website at http://www.health.ny.gov/vital_records/edrs/.

The EDRS team will be contacting you within the next couple of weeks to check on the status of setting up Health Commerce System (HCS) accounts and EDRS roles. Webinar training will also be provided, as needed, for all staff that will be accessing EDRS. For questions or additional information, you may contact the Department of Health’s Bureau of Vital Records – EDRS Unit via email at eds@health.ny.gov

Support and cooperation from the health care community is essential for moving forward and successfully implementing this worthwhile initiative. The Bureau of Vital Record’s EDRS staff look forward to working with your facility in the coming weeks.

Sincerely,

Robert Locicero
NYS Registrar
Director, New York State Vital Records
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Please be aware, the materials in this packet are ‘a point in time’. For the most current materials, please visit our website at http://www.health.ny.gov/vital_records/edrs/.
April 29, 2016

Dear Hospital Administrator:

It is with great pleasure and enthusiasm that the New York State Department of Health (Department) announces the implementation of the Electronic Death Registration System (EDRS) in New York State. In September 2013, legislation was enacted that created Public Health Law §4148, authorizing the Department to develop, implement, and maintain an EDRS for the purposes of electronically completing, filing, and maintaining death certificates in New York State. Among the benefits of the EDRS is that it will streamline the death registration process, improve the quality and timeliness of data collected, create more efficient disease tracking for public health purposes, and improve communication for all responsible parties.

Your facility’s compliance and support of the EDRS is imperative to its success. The Department asks that you review the material that has been provided to you by the EDRS team and to take all necessary steps to facilitate a transition from a paper-based death certificate to an electronic-based death record. The EDRS team is also equipped to assist hospital staff through various preparatory measures and offer guidance through documentation and training opportunities. Training will be provided for all physicians, residents, medical and administrative staff involved in the completion of the medical certification section of a death certificate.

The implementation of EDRS in New York State has been fully endorsed by the Centers for Disease Control and Prevention, National Center for Health Statistics as a means to strengthen public health data reporting. EDRS will not only provide more current and accurate mortality data, but will also aid in the prevention and intervention of disease outbreaks. Although it is anticipated that it may take some time before all death records are being completed electronically, the advantages of the EDRS over time will undoubtedly compliment the mission and vision at your health care facility.

Thank you for your anticipated cooperation and compliance with the implementation of the EDRS. The Department has worked hard to provide you with the best documentation and training options for each role and learning style, while being cognizant of your staff’s time and accessibility on the job.

Sincerely,

Howard Zucker, M.D., J.D.
Commissioner of Health
October 28, 2016

Mr. Robert LoCicero  
NYS Registrar  
Director, New York State Vital Records

The Centers for Disease Control and Prevention, National Center for Health Statistics, Division of Vital Statistics wish to acknowledge and support your current efforts in implementing and sustaining a statewide electronic death registration system (EDRS). This effort is not only consistent with CDC’s National Surveillance Strategy currently being supported throughout the agency, it aligns with the current efforts to advance capacity and bolster our mortality surveillance network.

The timely reporting of death information is critical for detecting and defining pandemic and calamitous events as well as identifying important factors that are vital to prevention and safeguarding the public’s health. Yet, timely death reporting continues to be a major challenge due primarily to antiquated paper systems that historically are more inaccurate and less timely than electronic reporting. This prevents the timely identification of trends and the development of prevention or intervention strategies. It also sustains a vital records business model that is more costly and inefficient to operate.

The State of New York’s vision and recent legislation enacting electronic death registration is applauded and endorsed as a valid, viable and valued public health action. The ability to establish electronic death reporting will reduce not only public health barriers, it will advance the effectiveness of public health by eliminating barriers that either erroneously report data, perpetuate lengthy delays in reporting data, or continue to sustain a model that is costly and inefficient to the public health jurisdiction.

Due to the advancement of technology and the availability of tools which may be employed to support your state and local vital statistic programs, your endeavor to employ a statewide EDRS is commendable. It reflects your understanding that a 21st century EDRS is an inevitable cornerstone of future death reporting in this country.

Sincerely,

Delton Atkinson, Director  
Division of Vital Statistics  
CDC/National Center for Health Statistics
Electronic Death Registration System (EDRS) Preparation Checklist

It is highly recommended that your facility’s HCS Director, or designated point of contact, act on the below required tasks to prepare your facility and staff for EDRS. Timely adherence to these steps ensures a smooth EDRS rollout while keeping an effective level of efficiency, productivity, and customer service at your facility.

Set-up Tasks:

1. Identify your facility’s EDRS Implementation Point of Contact (PoC).
2. Send your facility’s EDRS Implementation PoC’s contact information to the EDRS team.
3. Identify and instruct all units and individuals, currently processing death certificates, to request HCS accounts.
4. Identify your facility’s HCS Coordinator*, who ensures each person identified in step 3 is
   a. Enrolled in HCS,
   b. Affiliated with your facility, and
   c. Assigned appropriate EDRS role(s).
5. Verify hardware and software requirements are met, and purchase/upgrade as necessary. (See enclosed System Requirements document for details.)
6. Go to https://commerce.health.state.ny.us to confirm access for each person and each technology device (computer or laptop), working with your IT support if necessary.
7. Communicate with your staff that EDRS is coming, using the enclosed materials and other internal methods.

Knowledge Preparation Tasks:

2. Participate in training opportunities offered by the DOH EDRS team, or coordinate internal training.
3. Communicate with your staff where and how to access EDRS documentation and training – sharing the provided self-paced tutorials.

Go-Live Tasks:

1. Communicate with your staff that EDRS is here – providing specific dates, roles and responsibilities and any business process changes.
2. Start death certificates within EDRS, contacting the EDRS team as needed for assistance.

For questions or assistance, contact the EDRS team at edrs@health.ny.gov
The following are the minimum requirements for accessing EDRS through the New York State Department of Health’s Health Commerce System (HCS) and processing electronic death certificates in the EDRS. Work with your technical support team to ensure at least the minimum requirements are met at your facility.

**Recommended software is in bold text below.**

- **4 GB memory**
- **Windows** Vista, Windows 7, Windows 8, or Windows 10 Operating System
- **Internet Browsers**
  - Microsoft Internet Explorer (version 11.0 or higher)
  - Google Chrome (current stable release; Windows platform)
  - Firefox (current stable release, but limited HCS support)
  - Safari 9 (Mac Operating System)
- **High-speed internet connection**
- **Adobe Acrobat Reader** (9.0 or higher - to view/print forms and reports)
  - Note: A browser should not be used as the default viewer for printing burial permits or death certificates.
- **Printer**
  - Note: When printing forms from EDRS, set printer to **Shrink to Fit** or **Shrink to Page** so that the entire form will print. Verify format in Print Preview before printing.

**Note:** At this time the EDRS is not compatible with mobile devices.
Who is the HCS Coordinator?

When an organization's HCS Director signs an agreement with NYSDOH regarding the Security and Use Policy of the Health Commerce System (HCS), he/she designates an employee to fulfill the role of HCS Coordinator. The HCS Coordinator:

- is computer savvy
- becomes the **principal point of contact with NYSDOH** regarding account access for people in the organization and responds to inquiries from NYSDOH about user accounts
- agrees to **abide by the terms and conditions of the Security and Use Policy** that has been signed by the organization's HCS Director and the incumbent
- **maintains an active account** on the HCS
- becomes familiar with and uses the Coordinator's tools on the HCS to view and **maintain users contact information and roles for the organization**
- **deletes account** if someone leaves the employment of your organization or has changed jobs within your organization where HCS access is no longer required
- **approves User Account Requests** for people needing access to HCS

A major responsibility of the HCS Coordinator is to help maintain the security and confidentiality of information on HCS. Every individual with an HCS account is held responsible for keeping his/her account information private and confidential. If NYSDOH suspects the security of HCS may have been compromised because a user has breached the agreement by sharing his/her account information, NYSDOH will contact the HCS Coordinator as soon as possible after the discovery to notify the Coordinator that the suspect account is suspended and why. This will be followed up with a formal letter requesting an investigation of the circumstances and a response detailing the outcome, steps taken to prevent future occurrences, and a request for final disposition of the suspect account within thirty days.

A facility can have more than one HCS Coordinator. Based on your facility’s business process flow, determine if an existing HCS Coordinator is sufficient. To maintain user accounts, you might consider having additional HCS Coordinators for each unit. This direct oversight of HCS users can mitigate non-compliance with the mandated 72-hour death registration window.

*If you need assistance to identify your current HCS Coordinator, contact the EDRS team via email or telephone, (1-844-866-EDRS (3377).
Assign an EDRS role to Individuals with existing accounts in the Health Commerce System (HCS)

This process is completed by the facility’s HCS Coordinator.

Follow these steps to grant EDRS access to an individual in a given role.

1. Log into HCS with your HCS User ID and Password.
2. Click Coordinator’s Update Tool link from your HCS Home Page.
3. Click the radio button to select the appropriate organization(s) to which the individual will be assigned.
4. Click the Select button.
5. Click Manage Role Assignments (blue tab on the banner).
6. Click the Modify link to right of the EDRS role name associated with your organization. Please note, an individual should be assigned to only one EDRS role within your organization. (i.e., a Funeral Director should be assigned the role of EDRS Funeral Firm only).

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<td>EDRS Funeral Firm Facility Staff</td>
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<tr>
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<td>EDRS Medical Certifier</td>
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<tr>
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<tr>
<td>Medical Facility staff person</td>
<td>EDRS Facility Staff</td>
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<td>Local Registrar or Deputy Registrar</td>
<td>EDRS Local Registrar</td>
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<tr>
<td>Sub-registrar</td>
<td>EDRS Sub-registrar</td>
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7. Perform one of the following:
   a. If you see the person’s name under section 3, click the box next to the name and click Add Role Assignments.
   *Do not assign the role if there is a ‘na’ after their name, especially if you know the user has an existing HCS account.
   b. If you cannot locate the person in the list, scroll down to section 4. Enter the person's last name in the Search for Person(s) by name, and click Submit. Highlight the person in the list with a valid user ID and click Add Role Assignments.

8. To confirm that the individual was assigned to the EDRS role in your organization go back to Manage Role Assignments (blue tab on the banner within the Coordinator’s Update Tool), and click the Modify link located to the right of the EDRS role you just assigned. The individual’s name should now appear under section 2.

9. Notify the user that he or she has been assigned the role and should now see EDRS in the My Applications list the next time they log into HCS. If the EDRS link is not there, click on the “Refresh My Application List” button. He or she should be able to log into EDRS and select the organization from the EDRS Office Selection screen.
Assign an EDRS Role to Individuals with Existing Accounts in the Health Commerce System (HCS)

This process is completed by the facility’s HCS Coordinator.

Follow these steps to grant EDRS access to an individual in a given role.

1. Log into HCS with your HCS User ID and Password.
2. Click Coordinator's Update Tool link from your HCS Home Page.
3. Click the radio button to select the appropriate organization(s) to which the individual will be assigned.
4. Click the Select button.
5. Click Manage Role Assignments (blue tab on the banner).
6. Click the Modify link to right of the EDRS role name associated with your organization.
   
   NOTE: An individual should be assigned to only one EDRS role within your organization. For example, a Funeral Director should be assigned the role of EDRS Funeral Director only.

   PLEASE NOTE: HCS Coordinators for funeral firms will still need to assign themselves a user role if they need to access cases.

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7. Perform one of the following:
   a. If you see the person’s name under section 3, click the box next to the name and click Add Role Assignments.
      NOTE: Do not assign the role if there is ‘na’ after their name, especially if you know the user has an existing HCS account.
   b. If you cannot locate the person in the list, scroll down to section 4. Enter the person's last name in the Search for Person(s) by name, and click Submit. Highlight the person in the list with a valid user ID and click Add Role Assignments.

8. To confirm that the individual was assigned to the EDRS role in your organization go back to Manage Role Assignments (blue tab on the banner within the Coordinator’s Update Tool), and click the Modify link located to the right of the EDRS role you just assigned. The individual’s name should now appear under section 2.
9. Notify the user that he or she has been assigned the role and should now see EDRS in the My Applications list the next time they log into HCS. If the EDRS link is not there, click on the “Refresh My Application List” button. He or she should be able to log into EDRS and select the organization from the EDRS Office Selection screen.

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Remove an EDRS role when an individual leaves your organization or his/her role changes

Follow these steps when you need to remove EDRS access from an individual.

1. Complete Steps 1-6 above.
2. In section 2 of the Role Assignments page, locate the user you wish to remove in the table and click on the checkbox to the right of his or her name.
3. Click Remove Role Assignments. You will be returned to the Coordinator’s Update Tool, Role Assignments page. A confirmation message should display at the top of the main window, confirming the person is successfully removed from the EDRS role.

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For additional assistance, please call the EDRS Call Center at 1-844-866-EDRS (3377)
EDRS for Medical Certifiers and Staff

Access EDRS
1. Log in to HCS at https://commerce.health.state.ny.us/public/hcs_login.html
2. Enter your User ID and Password, then click Sign In.
3. Click on EDRS from your application list.
4. Click on your office for the case you are entering.
   **Note:** If you are associated with more than one office, be sure to select the office the case is affiliated with, or you will not be able to fully access the case.

Start/Edit New Case
*Done any time before signing certificate.*
1. Click the **Death Start/Edit New Case** button or select **Life Events > Death > Start/Edit New Case** from the menu bar.
2. Enter the required information for **First name**, **Last name**, **Date of Death**, and **Sex**.
3. Click **Search**.
4. If no record appears, or possible duplicate cases display but are not your case, click **Start New Case**.
5. If the record appears, click on decedent’s name to access the existing case.

Locate a Case You Own
Use this feature to find cases you started in EDRS or have been assigned to you by another party in the process.
1. Select **Life Events > Death > Locate Case** from the menu bar.
2. Enter decedent information.
   (Must match data entry exactly)
3. Click **Search**.
4. Click on decedent’s name to access the existing case.

Enter Death Certificate Information
1. Complete **and validate** each page under the **Medical Certification** section.*
2. Once all information is entered, click on the **Certify** page now appearing in the **Medical Certification** section.
3. Read the **Affirmation** statement and then click on the checkbox.
4. Click **Affirm**.

*Any Manner of Death other than ‘natural’ must be certified by a Medical Examiner.

Making Corrections After Certifying, Before Registered
Corrections can be made any time before a case you own is registered and if you have not dropped to paper.
1. Access the case in EDRS using either the **Locate Case** button or **Life Events > Death > Locate Case** from the menu bar.
2. Go to the **Certify** page and click **Uncertify**.
3. Click OK in the confirmation message pop-up box.
4. Make necessary changes and click **Validate Page**.
5. Go to the **Certify** page, then read the **Affirmation** statement and click on the checkbox.
6. Click **Affirm**.

**Note:** Any corrections needed after the certificate is registered are to be submitted to the local Registrar on paper.

Validation and Stoplight Rules
You have the option to validate each page after entering fact-of-death information. The system will check for errors. Icons appear to the left of each page in the **Death Registration Menu** (left navigation bar).

- **Red X:** Information is still needed on this page; it is incomplete.
- **Yellow dot:** Information is complete on this page, however some field entries were overridden. This may happen if information is not known at the time of data entry or the data entered is accurate but conflicts with EDRS system rules.
- **Green check:** Information is complete and acceptable for this page.

Make appropriate edits or necessary overrides and repeat page validation. All icons must be green or yellow to sign the certificate.

Updated January 2017
For assistance, contact the EDRS Call Center at 1-844-866-3377 or email edrs@health.ny.gov
View Your Queue Summary
You can only monitor your workload of the cases you own through your queue.
1. Click the Registration Work Queue Summary button or select Queues > Registration Work Queue Summary from the menu bar.
2. From this summary page, click on the Queue Name (category) for which you would like to see your cases.
3. Click on the Decedent Name on which you are working. Alternately, you can check the box to the left of the desired case and select an action below the list, such as Add Comments.

Transfer a Case
You may need to transfer a case you started to another medical certifier other than a medical examiner.
1. Access the case in EDRS.
2. Click Transfer Case in the Other Links section of the left navigation bar.
3. Check the Transfer Medical Ownership To: box.
4. Click on the eraser (pencil icon) to remove your facility.
5. Use the Lookup tool (magnifying glass icon) to locate the new owner of the case.
6. Add any notations to the message and click Save.

Relinquish a Case
1. Access the case in EDRS.
2. Click Relinquish Case in the Other Links section of the left navigation bar.
3. In the Relinquish Case pop-up box, click OK.
Note: If you relinquish a case, you will no longer be able to access this case.

Print Forms
- Drop to Paper: Converts certificate completion to paper version. Case cannot be completed electronically once this is selected.
- Working Copy: Can be used to review case as Death Certificate format.

Things to Remember
If you are affiliated with more than one facility, make sure you select the appropriate office when accessing EDRS.

It is very important to fully complete the Cause of Death section of the death certificate.

You cannot make changes to, relinquish, or transfer a case if you have already certified the case. You have to ‘uncertify’ the case first.

Once you start a case, it cannot be deleted.
You can override some data entry rules, but it is not suggested.
Drop to Paper is a last resort!
Avoid typing text in fields that have the Lookup Tool (magnifying glass) available. Search using the Lookup Tool, and add a wildcard character (%) before and/or after your search text to find more possible results.
EDRS Frequently Asked Questions

The following questions are frequently asked at training sessions and implementation meetings. Click the links here to jump to a category, or scroll down to view all questions and answers.

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<td>Medical Facility/Certifier Specific</td>
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<tr>
<td>Medical Examiner/Coroner Specific</td>
<td>Registrar Specific</td>
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See the EDRS User Manual, posted on the EDRS webpage for full instructions on using EDRS.

General Access Questions

**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 and then your affiliated offices’ HCS Coordinator to grant access to the system.

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.

**How do I get an HCS 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](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 Account 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.

**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. 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.

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 facility and have an EDRS role assigned to your HCS account.

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 browser 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.
**What if I don’t have a printer?**

Primarily, a printer is needed if you want or need to use any of the paper formats of a certificate, such as *Drop to Paper* or viewing a *Working Copy*. Funeral firms must have a printer to self-print a *Burial Permit*.

**What if I have a problem logging into EDRS?**

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.**

**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 at 30 minutes of inactivity in the application.
**Where can I access training?**

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 webpage](#) 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 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.

**General Case Questions**

**How do I start a new case in EDRS?**

After logging into EDRS, use the [Death Start/Edit New Case](#) Fast Links icon on your EDRS homepage or the menu path **Life Events > Death > Start/Edit New Case**. Be aware that once you click **Start/Edit New Case**, the case is permanently established in EDRS and cannot be deleted.

**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** functionality only works for cases you own. Unless you started the case in EDRS or have accessed the case and taken ownership for the portion responsible by your role, you must use the **Death Start/Edit Case** functionality. 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](mailto: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 do not have to validate each page as you enter data on a case in EDRS, however, the case will have to be validated in order for the Sign or Certify page to appear. Just be sure to click Save before navigating away from a page after entering data or your entries may not be saved.

You can click the Validate Page button at any point when creating or updating a case. The whole case is validated and saved whenever this button is clicked. It may save time when entering data by not validating each page at that time, however, you may have to revisit pages if errors occur.

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 maintain his or her workload and adhere to the 72 hour registration window. Cases assigned can be found through either the work Queues (icon or menu option) or Messages directly from his or her EDRS homepage. 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.

How will EDRS determine the appropriate town, village, hamlet, etc. in which a death certificate should be filed?

VitalChek worked with New York State to incorporate a “New York State Places” table to assist with proper recording of locality and assignment of recorded district. This table is a listing of New York State hamlets, villages, towns and cities and corresponding FIPS (geo-) codes. There may be times when EDRS selects an incorrect location. This generally happens when there could be overlapping jurisdiction. The filing registrar information can be corrected in EDRS if necessary. The Funeral Firm/Director should make every attempt to confirm the correct jurisdiction prior to 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 medical examiner/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.

- 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.

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 1-844-866-3377 or 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?

Once a case is dropped to paper, the entire process is paper based. Edits and amendments are no longer accessible in EDRS.
For Funeral Directors and Funeral Firm Staff

Will the Social Security Number (SSN) be directly linked to the Social Security Administration?

EDRS currently validates the SSN is not a duplicate to any other number in the database. A future EDRS enhancement will include SSN verification for the decedent with the Social Security Administration.

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?

The Funeral Director and Funeral Firm information on the Disposition page must be matched to those entities in the EDRS database. First erase the data using the pencil icon. Next either type in the Funeral Director 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 Funeral Director by name.

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?

Once the disposition type of ‘cremation’ is selected in EDRS, a Cremation Clearance page appears. However, the Cremation Clearance page has limited functionality at this time. The cremation clearance functionality in the system is expected to be implemented later in 2017 when Medical Examiners/Coroners are brought online in EDRS. For now, where required cremation clearance should be completed outside of EDRS using the existing process determined by your jurisdiction. Validate the page, and then override any error messages, and revalidate.

Note: If the jurisdiction of the Place of Death does not require cremation clearance, the Cremation Clearance page will still appear. Once validated, you can override the error messages and revalidate. The case will be filed with exceptions in EDRS.
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?
Orders for copies of the official death certificate can be submitted through EDRS, however, payment must still be paid in person with the local registrar.

For Physicians/Medical Certifiers and Medical Facility Staff

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 “John Doe” or “Jane Doe.” If there are multiple unidentifiable bodies in the same jurisdiction on the same date, use “DoeA,” “DoeB” etc. for each body.

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.
Is there anything to prevent physicians from choosing something other than ‘natural’ for the Manner of Death? Any alerts?

The system doesn’t restrict certain Manners of Death based on the role of the person entering information on the case. However, if a Manner of Death selected is anything other than ‘natural,’ certification of the case is restricted to a Medical Examiner. A validation message does display regarding the ME certification.

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. In this case, the Certifier type should be changed to ‘physician acting on behalf of the attending physician.”

I typed in the physician information on the Certifier page, but the physician cannot sign the case. Why?

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 license information nor use the Lookup Tool. What 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.

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?**

Any death NOT from natural causes needs to be referred to and certified by a medical examiner. As an attending physician, you should complete as much information on the case in EDRS as is possible before the referral.

At this time referrals to medical examiner/coroner should be processed outside of EDRS using the existing local process. **The functionality to process these referrals electronically in EDRS will be implemented later in 2017** when medical examiners/coroners are brought online in the system.

**What if a funeral firm is not involved with the decedent?**

Medical certifiers must still certify a death until such time as a funeral firm is engaged in the process. Generally, a case not involving a funeral firm is an unidentified body in which case a medical examiner is usually involved. The Medical Examiner/Coroner should be responsible to gather and complete the decedent’s personal information in order for the case to be registered. A Public Administrator may be assigned the case if no next of kin is established to claim the body, who will then engage a funeral firm.

**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](https://www.cdc.gov/nchs/about/mortcas.htm). 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 a medical examiner/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 on the case I am working on, but I have not seen it on 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.
For Medical Examiners/Coroners and ME/Coroner Staff
(Functionality for ME/Coroners is not yet available in EDRS.)

Note: As a medical certifier, be sure to check the questions and answers in the For Physicians/Medical Certifiers and Medical Facility Staff section of the document in addition to the below.

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?

When you access the case in EDRS, make sure you “accept” the case through the ME Review Case screen. This will allow you to edit fields in EDRS.

Medical Examiners/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.

I received a message that a cremation clearance was requested. What do I need to do?

You can access a case for cremation clearance without taking ownership of the case. Simply click in the case identifier (case ID or decedent name) in the message of your Messages list and navigate to the Cremation Clearance page under Other Links of the left navigation bar. On the Cremation Clearance page you can approve or reject the request. If approving, enter the cremation clearance number and save the entries. EDRs will automatically send a message back to the requestor.

How do I complete the personal information for a decedent when a funeral firm is not engaged?

There is an option on the Decedent screen indicating a Medical Examiner will be responsible for the personal information. When the dropdown is ‘Yes’ all Personal Information screens become editable by the ME/Coroner. If no ME is involved, the medical facility does have the option to Drop to Paper and complete the personal information in order to register a death with the local registrar. In most cases, when no next of kin is identified or refuses 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.
For Registrars, Deputy Registrars, and Sub-registrars

**Will local registration offices still have hard copies of death certificates?**

Yes, registrar office should still have a hard copy, generally referred to as a “white” copy, on file. During the implementation period for EDRS it is expected that, depending on the area, there will still be fully paper certificates, partially electronic certificates and fully electronic certificates. If the current death certificate form is submitted, the registrar will process as usual, keeping the carbonless copy designated for the local registrar. If a single hard-copy, that was half electronic and half manually completed, is submitted the registrar can make a photocopy for their files. Fully electronic cases can be printed from the “Vault Copy” within EDRS.

**How does the local register number get assigned to an EDRS case?**

The local registrar is responsible to enter the local register number in the appropriate field on the **Identifiers** page within an EDRS case. It is the responsibility of the local office to track and maintain that local numbering. EDRS does have a soft edit to flag the field in case of 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 Copy** (white copy) when generated from EDRS.

**How will certificates be 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.

**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.
**How will corrections be addressed 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 permit was issued by a person who is not listed in the Lookup Tool (magnifying glass), then their name can be typed into the appropriate fields.

After making corrections, click **Validate Page**, and click **Save**. Then click the **Local Registrar Affirm** in the left navigation bar, and complete the **Affirmations** page.

Any additional corrections needed after the certificate is registered should be made 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.)
Paperless HCS Medical Professions Account

The Health Commerce System (HCS) Medical Professions account request has gone paperless! No more signatures and notary. Applying for an HCS account is as simple as filling out an online form and having a NYS DMV Driver License or NYS DMV Non-driver Photo ID. Medical Professionals that do not have a NYS DMV Driver License or NYS DMV Non-driver Photo ID can still apply for an HCS medical professions account using the existing process which requires signatures and a notary.

Important information!

To enroll using the paperless process you must have a:
- NYS DMV Driver License or NYS DMV Non-driver Photo ID
- NYS Education Department registered medical professional license

Where do I go to apply for an HCS account?

1. Open your web browser and enter this website in the address bar
   
   https://apps.health.ny.gov/pub/top.html

How do I apply for an account?

1. Click ‘Apply for an HCS Medical Professions account’
2. Click ‘I have a NYS DMV driver license or NYS DMV Non-driver Photo ID’
   NOTE: If you do not have a NYS driver license, you can still apply by clicking ‘I do not have a NYS DMV driver license or NYS DMV Non-driver Photo ID’
3. Enter your medical profession information, click Submit
   Important! Your first and last name, license type, Professional license number, and SSN must match what is in the NYSED Office of the Professions
4. Enter your DMV information from your driver license or non-driver photo ID exactly as it appears on your driver’s license, click Submit
   Important! Your first and last name, license number, date of birth, gender, and zip code must match what is on your NYS driver license or NYS Non-driver photo ID
5. Enter your contact information (fields marked with an asterisk are required)
6. Agree to the terms outlined in the Security and Use Policy (SAUP), check the box, and Submit
7. Create your new password, confirm the password, click Submit
8. Congratulations, you have an HCS account. Keep your userid as it will be required for all HCS access

How do I sign on the HCS?

1. Click the HCS website link in your congratulations page when applying OR your congratulations email that you received
   
   https://commerce.health.state.ny.us
2. Enter your User ID in the appropriate field
3. Enter your Password in the appropriate field
4. Click Sign in

* If you have issues logging in to the HCS with your userid and password, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1 (M-F 8am-4:45pm)
A. User steps...

What are the steps?

To obtain an account, you must:
1. Register for an account
2. Enroll your account on the HCS. This step must be done with your HCS Coordinator

Where do I register?

1. Open your web browser and enter this web address in the address bar: https://commerce.health.state.ny.us
2. On the HCS log in page, click All Others
3. Click ‘Register for an account’

How do I register?

1. Complete the Name, Address and Policy Statement sections, and click Continue
   NOTE: Your name must match what is on your Photo ID
2. Create a user ID and password, click Continue
3. Answer at least six of the 27 secret questions, click Register
4. Verify your account information, and click Confirm
5. Print your Account Registration Completion email printout and your Photo ID
6. Print your confirmation email that your user ID was created
7. See your *HCS Coordinator with your Account Registration Completion email printout and your Photo ID

B. Coordinator steps...

How do I enroll a user with the paperless process?

1. Log on the HCS
2. Click Coord Account Tools - HCS under My Applications
3. Click User under ‘Request an account for a…’
4. Select Yes, they have a Valid Photo ID
5. Select your organization in the list
6. Enter the user’s HCS ID, click Submit
   NOTE: This information must be supplied by the user when they registered for an HCS account
7. Enter the user’s information from the Photo ID, click Submit
   NOTE: The information must match exactly
8. Enter the user’s contact information (fields marked with an asterisk are required, click Submit
9. Your user is enrolled on the HCS. Please instruct them to use their user ID and password they created and sign in the HCS (https://commerce.health.state.ny.us)

C. User steps...

How do I sign on the HCS?

Once your HCS Coordinator completes their steps above, you will be enrolled on the HCS and receive a congratulations email. Do the following:
1. Read the ‘Document 2 SAUP’ for rules and responsibilities
2. Click the HCS website link (or copy and paste it in your browsers address bar), and enter your user ID and password that you created when registering

Important Information!

Newly enrolled users will receive an email. Existing users will not receive an email.
**HCS Portal Forgot Your Password? Quick Reference Guide**

The **Forgotten Password Feature** is a self-service tool that will allow users to reset their password on-line. Upon updating your next expired password, you will be prompted to choose and provide answers to a series of challenge questions (e.g., “What is the name of your childhood pediatrician?”) to enable the forgotten password feature.

**Step 1 – Enable the Feature**

- To **Enable the Forgotten Password Feature immediately**
  1. Sign in to HCS
  2. Click **My Account**
  3. Click **Enable Forgotten Password**
  4. Enter your **Password**
  5. Answer at least 6 of the 27 Secret Questions
     - **NOTE:** You will be required to answer 3 of the 6 when using the feature
  6. Click **Save**

**OR**

You will be prompted to **Enable the Forgotten Password Feature upon your next expired password**

1. Enter your **User Id** and **Password** and click **Sign In**
2. Enter your **Password** again and click **Next**
3. Enter your **New Password** and **Confirm Password**
   - **(see Rules for creating your new password)**
4. Click **Change Password**
5. Answer at least 6 of the 27 Secret Questions
     - **NOTE:** You will be required to answer 3 of the 6 when using the feature
6. Click **Save**

**Rules for creating your new password**

- Must be at least 8 characters long
- Must have at least 5 letters
- Must not match any of the 50 previous passwords
- Must not contain your last name
- Must have either 2 numbers, 2 special characters or 1 number and 1 special character.

**Please Note:** The following special characters are not allowed: * " / # @ ,

**Step 2 - Use the feature**

**Forgot Your Password?**

1. Click **Forgot Your Password?**
2. Enter your **User ID**
3. Click **Continue**
4. Answer the 3 questions from the Secret Questions you provided
5. Select if you are Visually impaired
   - Converts the Security Check Response from text to speech
6. Enter **Security Check Response**
7. Click **Continue**
8. Enter **New Password** and **Confirm Password**
9. Click **Change Password**
10. Click **OK**
11. Enter your **User Id** and **Password**
12. Click **Sign In**

**How do I?**

- Enable Forgotten Password
- Change my Secret Questions
- Change my password

1. Sign in to HCS
2. Click **My Account**
3. Click the appropriate link
4. Follow the prompts
Password Information

How to Change

To change your password manually before the expiration date:

1. You must be logged into the HCS at https://commerce.health.state.ny.us/
2. Click on My Content in the top right menu
3. Click on Change My Password

If you have forgotten your password, please use the self-serve Forgot Your Password? feature (only if it has been enabled). If you need further assistance, please call the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1. Please have your HCS PIN or NYS drivers license handy for identification verification.

NYSDOH employees - Issues with your HCS password MUST go to the Help desk at 518-473-3472.

Expiration Information

Passwords:

- Expire - every 90 days (3 months). You have up to 24 months to change your expired password. After that, your account is disabled and you will need a new password.
- Disable - after 24 months of inactivity. You must contact the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 option 1. Please have your HCS PIN or NYS Drivers License handy for identification verification.

Rules for Creating a New Password

The password must:

- Must be at least 8 characters long
- Must have at least 5 letters
- Must not match any of the 50 previous passwords
- Must not contain your email, first name, last name or full name in your password
- Must differ from the old password by at least 3 characters. For comparison purposes, an upper case letter and its corresponding lower case letter are equivalent.
• Must have either 2 numbers, 2 special characters or 1 number and 1 special character.
  Please Note: The following special characters are not allowed: * ' " \ # @ ,

Examples of good passwords:

**Works4NYSsHCS**
- This is considered a passphrase and meets the HCS requirements. Turn your wording into a passphrase by substituting letters for numbers, E for 3, O for 0.

**Tqbfrf213**
- Turn your phrase into an acronym. The above password is the first letter of the following words "The quick brown fox runs fast" along with the month and year.

Examples of bad passwords and why

Never use the password "password". That would be the number one password a hacker would try to use. Here are other bad password examples:

**111111**
- This is fairly apparent. The password will not work because it is all numbers. The password must contain at least five (5) alphabetic characters and either 2 numbers, 2 special characters or 1 number and 1 special character.

**David31**
- This password is your name and age. It follows all the rules, BUT anyone could guess what it is. If you enter david31, it will not work because the server is looking for that upper case "D". It is never recommended that you use your name in your password since it can easily be matched. Try breaking it up with numbers or special characters. (ie da31vid).

**golfer18**
- Avoid words that can be found in a dictionary.

Password Site Policies

Violation of the security and use policy (e.g. sharing your account userid and password with someone else) will result in the temporary suspension of your account privileges until required remedial action is taken by executives at your organization.

Repeat offenses may result in the permanent removal of the account.

Contacting the Commerce Accounts Management Unit with someone else's account information will result in the account being disabled due to a security breach.
EDRS

New York State
Electronic Death Registration System (EDRS)
User Manual

Version 2.1
February 2017
This document was produced by the New York State Department of Health, Bureau of Vital Records

All death and decedent details represented in images within this manual are fictitious
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Getting Started

Introduction

The New York State Electronic Death Registration System (EDRS) is a secure, web-based application used to electronically register death certificates across New York State (excluding the 5 boroughs of New York City).

The primary purpose of an EDRS is to enable death registration users - funeral firms, hospitals, nursing homes, physicians, and medical examiners and coroners - to file death records electronically with local registrars and New York State, within the required 72 hour window after a death occurs.

An EDRS provides on-line access for all parties involved to work on the same case to complete decedent fact-of-death and cause-of-death information without the need for a physical paper trail.

Note: At the time of manual posting, New York State Department of Health (NYSDOH) has opted to implement EDRS for ‘natural’ deaths in medical facilities only. Placeholders exist in this document for future Medical Examiner or Coroner functionality.

Using this Manual

This manual is designed to document the major EDRS functions pertaining to death registration, applicable to the New York State Department of Health (NYSDOH) and the National Center for Health Statistics (NCHS) requirements as well as New York State Public Health Law. After initial orientation and training, users can refer to this manual for learning and reference. It deliberately represents all user functions. For quicker and more specific role-based tasks, refer to the Quick Reference material posted to the EDRS subpages (by role) using the left navigation bar on the EDRS main webpage.

Note: All examples referenced or shown in screenshots in this document contain fictional death report information. Examples do not reflect all possible scenarios that may occur while processing an electronic death certificate. Page images may vary compared to the live application.

For specific questions, you may request help from the appropriate contact in the Getting Help section of this manual.

System Requirements

The following are the minimum requirements for accessing EDRS through the NYSDOH’s Health Commerce System (HCS) and processing electronic death certificates in the EDRS. Work with your technical support team to ensure at least the minimum requirements are met at your facility. Recommended software is in bold text below. Full detail of HCS technical requirements are posted on the HCS Browser Requirements web page.
- 4 GB memory
- **Windows** Vista, Windows 7, Windows 8, or Windows 10 Operating System
- Internet Browsers
  - Microsoft Internet Explorer (version 11.0 or higher)
  - Google Chrome (current stable release; Windows platform)
  - Firefox (current stable release, but limited HCS support)
  - Safari 9 (Mac Operating System)
- **High-speed internet connection**
- **Adobe Acrobat Reader** (9.0 or higher - to view/print forms and reports)
  - A browser should not be used as the default viewer for printing burial permits or death certificates.
- **Printer**
  - When printing forms from EDRS, set printer to *Shrink to Fit* or *Shrink to Page* so that the entire form will print. Verify format in Print Preview before printing.

**Note:** At this time the EDRS is not compatible with mobile devices.

---

**Passwords, Accounts, and EDRS Access**

EDRS access is through the New York State Health Commerce System (HCS). Each facility's HCS Coordinator with which you are affiliated, grants you access to the EDRS after you have requested an HCS account. Go to the **Getting Help** section of this manual for links and contact information to request an HCS account.

**Note:** Every individual accessing EDRS must have a separate user name and password. DO NOT share IDs and passwords. If you breach the security agreement by sharing IDs, your HCS permission can be terminated by the NYSDOH.

To access the EDRS, your HCS Coordinator assigns you one EDRS role based on job duties within your organization. **Only one EDRS role is assigned per user within an organization.** EDRS roles determine what information you can enter and your authorization permissions for signing, certifying, or registering a case. If you are an HCS Coordinator, refer to the Coordinator Help Documents in HCS for instructions on how to assign a role.

Once set up in HCS and EDRS, you will only need to remember one password. If you perform multiple roles in the death registration process, such as a Funeral Director and a Coroner, you will need to have the role assigned within each organization, but will still only need one HCS account.

Your HCS password provides single sign-on functionality; your profile and permissions carry over to the EDRS.

- Be aware that **HCS passwords must be reset every 90 days.** If you do not access the HCS for 90 days, you are prompted to change your password the next time you log in. *It is highly recommended to give yourself a reminder 60-89 days out from a scheduled expiration to reset your password on your own to ensure uninterrupted access.*
- Your HCS account is active for up to two (2) years without logging in. If you do not access the HCS over two years, your account becomes inactive, and you will not be able to access the EDRS. You will need to contact the Commerce Account Management Unit (CAMU) to reactive your account. Refer to the **Getting Help** section of this manual for contact information.
### Getting Help

Not every scenario can be documented in this manual. Use the table below if you have questions accessing the EDRS or while processing an electronic death certificate.

<table>
<thead>
<tr>
<th>For Help With</th>
<th>Contact</th>
<th>At</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting an <strong>HCS</strong> Account</td>
<td>NYSDOH HCS website</td>
<td><a href="https://commerce.health.state.ny.us/public/hcs_login.html">https://commerce.health.state.ny.us/public/hcs_login.html</a></td>
</tr>
<tr>
<td>(Non-licensed users and licensed medical professionals can use the <strong>sign up for an account</strong> options at the bottom of the login window.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>To establish an HCS account, Funeral Directors and Local Registrars should contact the EDRS Call Center at 1-844-866-3377, or email <a href="mailto:edrs@health.ny.gov">edrs@health.ny.gov</a>.</td>
</tr>
<tr>
<td>Your <strong>HCS</strong> User ID</td>
<td>NYSDOH HCS website</td>
<td><a href="https://commerce.health.state.ny.us/public/hcs_login.html">https://commerce.health.state.ny.us/public/hcs_login.html</a></td>
</tr>
<tr>
<td>(Use the <strong>Forgot Your User ID</strong> feature at the bottom of the login window.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your <strong>HCS</strong> Password</td>
<td>NYSDOH HCS website</td>
<td><a href="https://commerce.health.state.ny.us/public/hcs_login.html">https://commerce.health.state.ny.us/public/hcs_login.html</a></td>
</tr>
<tr>
<td>(Use the <strong>Forgot Password</strong> feature at the bottom of the login window.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>An <strong>Inactive HCS</strong> Account</td>
<td>Commerce Account Management Unit (CAMU)</td>
<td>1-866-529-1890</td>
</tr>
<tr>
<td>Assigning an EDRS role in HCS</td>
<td>Your facility’s HCS Coordinator</td>
<td>If you do not know who your HCS Coordinator is, contact the Commerce Accounts Management Unit (CAMU) at 1-866-529-1890 for assistance.</td>
</tr>
<tr>
<td>Getting an <strong>EDRS</strong> account</td>
<td>The NYSDOH EDRS team</td>
<td>EDRS Call Center: 1-844-866-3377 Email: <a href="mailto:edrs@health.ny.gov">edrs@health.ny.gov</a></td>
</tr>
<tr>
<td>Accessing EDRS if unavailable from the <strong>My Applications</strong> list</td>
<td>(self)</td>
<td>First try clicking the <strong>Refresh My Applications List</strong> at the bottom of the list.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Next, try the steps below</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1. Select <strong>My Content &gt; All Applications</strong> from the menu bar.</td>
</tr>
<tr>
<td>For Help With</td>
<td>Contact</td>
<td>At</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>For Help With</td>
<td></td>
<td>2. In the <em>Browse by</em> section, click on the letter ‘E.’</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Click on <em>Electronic Death Registration System</em> in the list.</td>
</tr>
<tr>
<td>A question on a specific electronic death certificate</td>
<td>The NYSDOH EDRS team</td>
<td>EDRS Call Center: 1-844-866-3377 Email: <a href="mailto:edrs@health.ny.gov">edrs@health.ny.gov</a></td>
</tr>
<tr>
<td>A question on a specific field in EDRS</td>
<td>(self)</td>
<td>From the EDRS <em>Help menu</em>, click the checkbox for <em>Show Tooltips</em>. Checking this box will prompt a pop-up box with details when you hover your mouse over an EDRS field.</td>
</tr>
</tbody>
</table>

Broadcast messages about the EDRS, such as maintenance outages, system updates, etc. will be posted on the HCS Home Page, and/or on the EDRS Home Page.

---

**Access the EDRS**

The first step to access the EDRS is to log into the NYSDOH’s Health Commerce System (HCS). Perform the following to access HCS:

Have your **HCS User ID** and **Password** ready to access the system. If you do not have an HCS account, refer to the *Getting Help* section of this manual for instructions.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. On your computer, open Internet Explorer or other compatible browser.</td>
<td>See the <em>System Requirements</em> section in this manual for compatible browsers and other application information.</td>
</tr>
<tr>
<td>2. In the address field, type: <a href="https://commerce.health.state.ny.us/public/hcs_login.html">https://commerce.health.state.ny.us/public/hcs_login.html</a></td>
<td>The <em>Log in</em> page displays.</td>
</tr>
</tbody>
</table>

*EDRS USER MANUAL, FEBRUARY 2017*
3. Type your **User ID** and **Password**. Press the **Tab** key or use your mouse to advance from the **Username** to **Password** fields.

Your personalized **HCS Homepage** displays.
4. From your HCS Homepage, click the EDRS link in the My Applications navigation bar to the left of the window.

If you do not see EDRS, try clicking the Refresh My Applications List option at the bottom of that left navigation bar.

If EDRS still does not appear, refer to the Getting Help section of this manual.

Note: If you have a medical role and your medical profession is not established when your EDRS user profile is created at initial log in, you will be prompted to select a medical profession prior to seeing the next screen.

The EDRS Office selection page displays.
5. Click on your office name, or the appropriate office with which a specific case is affiliated if you are connected to multiple offices.

All offices with which you are affiliated appear on this page. If you see multiple offices by the same name, for instance in the case of a funeral firm with more than one location, the offices will be listed in alphabetical order by location.

**Note:** If your office is not listed, click the link in the yellow bar, *Click here if profession or office not found*. The HCS and the EDRS will re-sync and all of your affiliated offices will appear.

The *EDRS homepage* displays.

**Note:** Menu options and *Fast Links* vary depending on your user role.
Case Ownership

A case in the EDRS must be “owned” in order to complete the death information. Essentially, the facility responsible for the deceased body at a given point in time “owns” the case in EDRS. If a medical staff person creates a case, it is available for a funeral firm to take ownership and vice versa.

Cases are linked to one office. If you are affiliated with multiple offices, make sure you select the correct office when working on a case in the EDRS. If you cannot find a case, you may need to change offices in the EDRS. Do this by clicking Main > Change Office on the EDRS Home Page.

Ownership can be transferred to another role, such as to a medical examiner or another funeral firm. If a case is owned by another facility, you will not find it when searched for nor will it appear in your queue.

There are situations where you can work on a case even though it is owned by another user, such as for trade calls between funeral homes, coroner cases where the coroner is not a physician, or requesting medical certification from a non-affiliated certifier.

Note: A case must be owned to use the Death Locate Case functionality, as explained in a later section of this manual.

Audit Trails

Every transaction in the EDRS is tracked and auditable. Any changes to a case are identifiable by a date/time stamp and user ID. The Registrar and/or NYSDOH EDRS Administrators can view the audit trail through the Events and Issuance History page within a case.

Timeouts and Logout

To comply with NYS Account Management and Access Control Standards, the HCS has a timeout feature. You will be logged out of the application after 15 minutes of inactivity. Be sure to save your work frequently.

In addition, use caution if multiple EDRS users are accessing the system from the same computer or device. Your log in information may be cached (saved) through the internet browser, keeping you logged in even if another user attempts to log in or access the EDRS on another tab.

For confidentiality and security reasons, you should always log out of the EDRS and close the browser window if you are leaving your work area.
EDRS Process Overview

The flow diagram below shows an overview of the typical flow of information and responsibilities within the EDRS.

Death Occurs

Death event (medical) information gathered and entered by medical professional

Cause of death natural? No

Refer case to medical examiner (currently external to EDRS)

Yes

Certify medical findings

Funeral firm engaged? No

Decedent personal information gathered and entered by medical professional

Yes

Decedent personal information gathered, entered and signed by funeral firm

Case signed

Case sent to local registrar

Local registrar Affirms case

Death Registered
Basic Navigation and Common Functions in the EDRS

Home Page Components

The following sections identify system functions and features available to all EDRS users. Role-based functionality is documented in the remaining chapters of this manual.

The EDRS homepage is the main page before searching for, or starting, a case. Below is an example homepage with an explanation of the page components. The Menus and Fast Links that are available will vary based on role.

<table>
<thead>
<tr>
<th></th>
<th>Affiliated Office</th>
<th>The affiliated office for which you are logged into to start or edit cases, review messages, or check your work queue. If affiliated with more than one office, you can change offices without having to log out by using the Change Office option on the Main menu.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Menu bar</td>
<td>The menu bar provides access to all functions in the EDRS connected to your user role.</td>
</tr>
<tr>
<td>3</td>
<td>Fast Links</td>
<td>Icons to quickly access certain functions based on your user role. Some icons only appear after accessing the feature a few times through the menu path first.</td>
</tr>
<tr>
<td>4</td>
<td>Username</td>
<td>Username for which you are logged into the EDRS. This may be handy if you need to get help when using the application.</td>
</tr>
</tbody>
</table>

Case Page Components

The following are page components displayed after a case is started or accessed for editing.

See Appendix A: Roles Matrix of this manual for a table of functions accessible by role.
1. **Death Registration Menu**
   The list of pages available for you to enter data. These pages vary depending on role—funeral firm or director, medical personnel or doctor, medical examiner or coroner, and Registrar, deputy Registrar or sub-Registrar. See images below for sample menus by role.

2. **Status Bar**
   Listing showing status for each section of the Death Registration Menu. See Appendix B: Roles Matrix for status bar descriptions.

3. **Date fields/Calendar Function**
   Enter dates in the appropriate fields. If the **Date of Death** is unknown, enter the same date as the **Date Pronounced**.
   * Type the date into the field using format, **MM/DD/YYYY**, or **MMDDYYYY**. If unknown, you can enter **999-99-9999** in certain fields.
   * Click on the calendar icon and use the calendar features to select the appropriate day, month, and year.
   * To enter the current date, simply click **F12** on your keyboard.

   **Note:** The arrow icon by **Date of Birth**, when clicked, will calculate the decedent’s age and populate the Years field.

4. **Case page navigation buttons**
   Buttons used to navigate through a case.
   * **Validate Page**: Checks your entries against system requirements to make sure all required fields are completed and saves the data. This function will also validate open text fields to ensure complete and accurate information.
   * **Next**: Moves you to the next page in the process.
   * **Clear**: Removes data you just entered on this page.
   * **Save**: Saves the data you entered on this page, but does not validate your entries against system rules nor move you to another page.
   * **Return**: Returns you to the last completed, saved page.
The pages listed in the *Death Registration Menu* align with your fact-of-death or cause-of-death role for data you complete on the paper death certificate.

See the images below to see standard pages available by role. Additional pages appear based on case situations, such as cremation as the disposition type or manner of death other than ‘natural.’

- Go to *Appendix B: Roles Matrix* to view access to pages and functions by role
- Go to *Appendix C: EDRS Death Certificate Layout* for a listing of the Death Certificate fields in correlation to EDRS fields and access.

**Note:** Funeral firm and medical office staff do **not** have access to sign or certify a death record, therefore these page options will not display. Sub-Registrars are not authorized to generate copies of death certificates.
Basic Navigation

This section outlines the basic EDRS navigation features *once you access a case*. These features are available for all roles.

**NOTE:** When working within a case in the EDRS, avoid using the browser Back button. Use of this button can disrupt communication with the database and could cause loss of entered data.

<table>
<thead>
<tr>
<th>Type of Navigation</th>
<th>What You Do</th>
</tr>
</thead>
</table>
| To move from **page to page** within a case | • Click the **Next** button at the bottom right of the main window, OR  
• Click on the page name in the *Death Registration Menu* of the left navigation bar. |
| To move **field to field** | Press the **Tab** key on your keyboard or move your cursor to, and click on, the desired field. |
| To enter values in a field with a **drop-down** box | • Click on the downward pointing arrow and click on the desired option from the list (this may require scrolling through the options), OR  
• Start typing the value you would want to select. A list of available options appears below the field that begin with the letter(s) you type. If/when you see the value you want, move your cursor to it and click on the value. |
| Autofill fields | A number of fields are automatically filled by the application when a selection is made in one field. For example, entering a **Facility** name from a list of values will, in turn, populate all of the address fields for that facility.  
Similarly, typing in a **License** number and clicking the arrow icon to the right of that field will populate the facility or user details such as address. |
<table>
<thead>
<tr>
<th>Type of Navigation</th>
<th>What You Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search for values on fields followed by a magnifying glass icon.</td>
<td>Click on the magnifying glass to access a search window. In that window, you can type in full or partial words or phrases. The system looks for exact entries matching your text unless a wildcard (%) is used. For partial entries, you will need to use a wildcard before, after, or before and after.</td>
</tr>
</tbody>
</table>

| %Smí | Searches for anything ending with ‘smí’ |
| Smí% | Searches for anything starting with ‘Smí’ |
| %Smí% | Searches for anything with ‘smí’ anywhere in the name |

The Eraser icon clears any values already in the given field and any field auto-populated by the previous data, such as a facility and its address.

**Validation Function**

By validating a page, you are asking the system to review your data entries and omissions against pre-set rules and to save the data entered. This will check that all required fields have data entered and that the data is complete and accurate. Once you validate one page, all pages are validated, as indicated by the stoplight colored icons to the left of the pages in the Death Registration Menu, even if you have not accessed those pages yet.

**Note:** You can validate the pages at any time while data entering, however, remember to click Save if you prefer to wait to validate after entering all case information.

Entries are checked against system rules to make sure all required fields are complete. This function also validates open text fields to ensure complete and accurate information.

By clicking Validate Page, the data is saved to the EDRS.
All messages appearing after validating a page are not necessarily error messages. The system simply recognizes the data as incomplete or inaccurate for system checks.

Fields with errors also change colors when validated:

- **Red/Pink fields** are required fields, hard-coded for specific data.
- **Yellow fields** are required fields, soft-coded so data entered can override system rules.

To override a ‘soft edit’ message, click on the Override checkbox for the message(s), then click the **Save Override** button. You must revalidate the case after saving for the override(s) to apply to the case. The fields and page will retain the yellow color to indicate exceptions to the system rules after being overridden.

**Note:** If you leave the case or log out of EDRS without signing or certifying a case, the next time you access the case, you will need to validate the case pages again. Validation errors are not stored in the database.
### 1. Validate Page button
- Checks your entries against system requirements to make sure all required fields are complete. This function also validates open text fields to ensure complete and accurate information.

### 2. Stoplight Validation Icons
- **Red 'x':** Edits are still needed on this page; it is incomplete.
- **Yellow dot:** Edits are complete on this page, however some field entries were overridden. This may happen if information is not known at the time of data entry or the data entered is accurate but conflicts with EDRS system rules.
- **Green 'check':** All edits were completed and acceptable for this page.

### 3. Validation Results
- Listing of fields requiring attention on this page, as determined by system checks.

### 4. Actions available to fix Error Messages
- Error messages correlate to a specific field on the page. The fields having validation errors change to red or yellow shading. Depending on the message, you have the option to perform one of the following for each:
  - **Override:** If a checkbox displays, you have the option to override the system rule. Be cautious using this feature.
  - **GoTo Field Fix:** Clicking this button moves your cursor to the field on the page to make changes.
  - **PopUp Fix:** Clicking this button opens a pop-up window in front of the page for you to make changes. This is handy if you are looking at a page with many fields or are just having difficulty seeing the field to which your cursor moved.

You must **Validate** the case again after acting on any error messages.

**Note:** When you override an error, after revalidating the page you will still see the error message listed in the Validation Results with the **Override** box checked. The page will be marked with a yellow dot icon in left navigation menu. You may continue to the next page.

---

### Review Workload (Queues and Messages)

The **Queues** menu option, or **Fast Links** icon, is another way to quickly check your cases and workload. Again, the queue options vary depending on your role. It is highly recommended to check your queue frequently.

The **Registration Work Queue Summary Fast Link** only appears after you have accessed the feature a few times through the menu bar first.

**Note:** Messages and Queues display for the office affiliation selected when logging into the EDRS. To view messages and work queues for another office, select **Change Office** from the **Main** menu.
Queue Summary

The Summary option is the most useful, showing you cases by category, such as Personal or Medical Pending status, Signature Required, or Registration, depending on your role.

Once you select a queue list category, you can access a case by clicking the Case ID or Registrant (Decedent) name. You can also reorder the column to be in ascending or descending numerical or alphabetical order, by clicking the column header.
Messages

Alternatively, you will receive system-generated messages or messages manually sent from other EDRS users. Access messages from the EDRS Home Page by selecting Main > Messages or clicking on the Messages Fast Links icon.

Click on the decedent’s name in the Message Text to access the specific case.

Note: Depending on the message trigger, some messages will automatically be removed from your message list. Other messages should be manually deleted when the case is accessed and action performed. Not every function in EDRS will generate a message; the majority of messages in EDRS are sent to all users within a facility, therefore a number have been turned off for confidentiality reasons and to not overload individual’s inboxes.
**Search by Queue**

To search for cases by queue, select the appropriate queues option from the Queues menu. This option shows you a list of cases for a specific queue and search criteria you enter.

For example, select the appropriate Queue from the drop-down list, such as Signature Required – Death. Next, select the Search Type, such as Funeral Home. Finally enter the value matching the Search Type, such as the full name, or partial name with wildcard, of the Funeral Home. Click Search to view the search results.

**Locate a Case You Own**

An option to search for a case is the Life Events > Death > Locate Case (or Search, for Registrars) function. You should *always* search for a case before creating a new one.

**Note:** The Locate Case function will only display cases you own. If you are affiliated with multiple offices, make sure you are logged into the correct office.

**Step** | **Comments/Prompts**
--- | ---
1. From the Life Events menu option, select Death > Locate Case OR Select Death > Search (for Registrars)
2. Enter data in at least one field. The more data entered, the more refined the search results.

3. Click Search.
4. From the list, click on the **Decedent’s Name** for the case you were looking to edit. If unsure, click the **Preview** option in the last column for the desired case.

**Note:** Only cases owned by the office you selected when logging in to the EDRS display in the results list.

If you previewed the case and it is the case you are working on, select it from that page by clicking on either the **Decedent’s Name** or the **Select** option in the far right column.

If no results are returned, there is no case in EDRS owned by that office matching the criteria you entered.

- If you know the case has been started,
  - First, confirm you are in the correct office
  - Next, contact the originating facility to confirm the decedent information.
- If you are, in fact, the first to start the case, back out of the **Locate Case** screens and use the **Start/Edit New Case** functionality.

---

**Start/Edit New Case**

The **Start/Edit New Case** page is used by all roles except the Registrar to start entering a new, or update an existing, case. Use this menu option before creating any new case to prevent duplication.
Note: A new case is saved in the EDRS once you click the Start New Case button, even if you do not enter any additional decedent death information or click the Save button! Be cautious starting a new case in the EDRS. Once you start a new case, it cannot be deleted from system. If you started a duplicate case, contact the NYSDOH EDRS team to ‘abandon’ the case.

**Step** | **Comments/Prompts**
--- | ---
1. From your EDRS homepage, either,  
   a. Click on the Death Start/Edit New Case icon  
   OR  
   b. Select Life Events > Death > Start/Edit New Case from the menu bar.

The Death Start/Edit New Case page displays.
2. Enter the required decedent information.

**Note:**

- Required fields are denoted with red boxes and carets pointing at the fields.
- Names should be entered with capitalized (upper case) first letters followed by letters in lower case. The EDRS will not allow you to type in all CAPS.
- Date format should be
  - (numeric) MM/DD/YYYY or MMDDYYYY
    - 09/02/1954 or 09021954
  - (alphabetic) MMMDDYYYY or MMM-DD-YYYY
    - Sep021954 or Sep-02-1954

If unsure about the required information,

- Enter “Unknown” for the name, enter the date the body was found and “unknown” for the gender.
- All fields can be edited once information is found or amended if case is registered with the unknown information.
3. Click **Search**. The *Death Search Results* page displays.

If there are no cases matching the criteria you entered, a message displays on the page. Skip to step 5.

If there is at least one case matching your criteria entered, go to the next step.

If no cases match the information you entered, the message above displays. If there are possible duplicate cases, the search results display like the page below.

4. Perform **one** of the following if a duplicate case displays:
   a. Click on the **Preview** link to the right of the case to review case information,
      **OR**
   b. Click on the **Decedent’s Name** if this is definitely the case you want.

See the table below to determine the best next step.
### Step 5: Click Start New Case.

The case record displays on the **Decedent** page.

<table>
<thead>
<tr>
<th>If…</th>
<th>Then you…</th>
</tr>
</thead>
<tbody>
<tr>
<td>this is your case, and you clicked on the Decedent’s name</td>
<td>are taken to the case record.</td>
</tr>
<tr>
<td>you previewed the case and it is the case you own and are working on</td>
<td>can select it from that page by clicking on either the <strong>Decedent’s Name</strong> or the <strong>Select</strong> option in the far right column. Then you are taken to the case record.</td>
</tr>
<tr>
<td>the case is the one you are looking for, but you do not ‘own’ the case</td>
<td>accept ‘ownership’ of this case in the pop-up box indicating it is an ‘un-owned case’ and you are taken to the case record.</td>
</tr>
<tr>
<td>you are, in fact, working on a case with the same criteria, but a different person</td>
<td>go to step 5.</td>
</tr>
</tbody>
</table>
6. Complete all of the pages pertaining to your role.  

   Comments/Prompts  

   It is recommended to validate each page before moving to the next page to ensure accurate and complete data. You can, however, save each page and validate once all case information has been entered.  

   To learn more, go to the section Completing Cases for your role in this document.

---

**Other Links Options**

Additional functions display under the Other Links section of the Death Registration Menu. The below functions are available for all roles. Options that are role-specific are covered in those respective sections of this manual.

---

**Changes and Amendments (Corrections)**

Changes can be made to a case in EDRS any time before it's registered by the local Registrar. Just remember that a case is automatically sent to the Registrar once signed and certified. If signed/certified and not registered, simply unsign/uncertify the record on the appropriate page for your role, then proceed to make the necessary changes. You then reaffirm to sign/certify the case again when changes are complete.

Once registered, an amendment (correction) request must be submitted to the local Registrar in hard-copy, using the same paper-based process in place before the implementation of EDRS.

---

**Print Forms (Drop to Paper and Other Copies)**

There are various forms available within the EDRS.

- **Burial Permit**: Issued to the Funeral Director to commence disposition of the body. The permit is printable (viewable) up to five times from the system after the death certificate is registered. Contact the Registrar if the permit needs to be reprinted.
• **Drop to Paper**: Transitions the case to a hard-copy paper format after being signed or certified. Use caution with Drop to Paper. The case is no longer electronically accessible for editing after being dropped to paper.

• **Working Copy**: Provides a view of the electronically entered data in a death certificate format. The Working Copy is available for all roles, and should be reviewed prior to signing/certifying to verify all information is complete and accurate. The Working Copy can also be used for validation when filing with a sub-registrar outside of regular business hours.

• **Vault Copy**: Displays for the Registrar only and represents the official death certificate. This is the version used to generate copies for electronically filed cases if requested. The vault copy can also be printed and filed in hard-copy as the source for corrections.

**Note**: If the body is being transported out of the country, additional documentation is generally required outside of EDRS. The documentation required is usually defined by the foreign government receiving the body. The Funeral Director must consult with

- The County Health Department or other authorized medical entity for appropriate health certifications,
- The local registrar, NYS Department of State, and/or Federal Department of State for appropriate seal or stamping, and
- The foreign government (embassy/consulate) to ensure compliance with all transport and receipt of the body.

**Comments**

You can post comments to a case in the EDRS. These are comments or information not required on the death certificate, but may be useful for historical purposes.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click <strong>Comments</strong> in the <em>Death Registration Menu</em> when viewing a case.</td>
<td>A <em>Comments</em> popup window displays.</td>
</tr>
</tbody>
</table>
2. Click **New Comment**. The window expands with data entry fields for the **Comment Type** and **Comment** text fields.

3. Select the **Comment Type** from the drop-down list and add text in the **Comment** field.
Step

<table>
<thead>
<tr>
<th>Comments/Prompts</th>
</tr>
</thead>
</table>

4. Click **Save**. The window refreshes with the comment just entered. You can edit or delete the comment, or leave the case.

**Request Medical Certification**

In the event that the medical certification has not been completed by a certifier, you can request a specific medical certifier to do so. By using this function, a system-generated message is sent to the recipient you select.
The **Certifier** and affiliated **Facility/Office Name** must be selected from the database and will populate the area above the message box. When you click **Save**, a system-generated message is sent to that selected recipient.

**Refer to Medical Examiner** *(future functionality)*

You need to refer the case to a medical examiner if the **Manner of Death** on the **Pronouncement** page is anything other than ‘natural.’

**NOTE:** The initial implementation of EDRS focuses on ‘natural’ deaths only, therefore Medical Examiners are not privy to EDRS accounts.

Perform the following:

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From any page within a case, click <strong>Refer to Medical Examiner</strong> in the left navigation bar. The <strong>County</strong> defaults from the <strong>Place of Death</strong> address.</td>
</tr>
</tbody>
</table>
2. Use the *Lookup Tool* (magnifying glass) to select the *Office* and *Medical Examiner*. Don’t forget, you can use the wildcard (%) feature to avoid misspellings.

3. Add any additional comments to the system-generated message, as desired. **Note:** Do not delete any text from the system-generated message. This is case identifying criteria for the new owner to use to locate the case.

4. Click **Save**. The page refreshes and the fields become read-only. The case is officially now “owned” by the Medical Examiner. You can leave the case.
**Relinquish Case**

If, for some reason, you are no longer responsible for a case, you can relinquish ownership in the EDRS. This may happen if you took ownership of the case in error or another funeral firm has been requested by the decedent’s family.

Once in the case, select **Relinquish Case** in the **Death Registration Menu** (left navigation bar).

**Note:** Once a case is transferred or relinquished, you will no longer have access to the case.

A system generated message pops up to confirm you want to relinquish ownership. Click **OK** to proceed or **Cancel** to retain ownership.

**Transfer Case**

There may be a time when you need to transfer ownership of a case to another funeral firm.

**Note:** Once a case is transferred or relinquished, you will no longer have access to the case.

### Step | Comments/Prompts
--- | ---
1. From any page within a case, click **Transfer Case** in the left navigation bar. | You can only transfer full ownership to another funeral firm.
2. Check the box for **Transfer Personal Ownership To:**.

3. Use the *Lookup Tool* (magnifying glass) to the right of the selected ownership type to locate the new owner. Remember the wildcard function (%) is available in the search windows if you are unsure about spelling or spacing in the new owner’s name within the database.

4. Click **Select** to the right of the name in the results list.

5. Add any comments to the message window, if desired. **Note:** Do not delete any text from the system-generated message. This is case identifying criteria for the new owner to use to locate the case, if necessary.

6. Click **Save.** A system-generated message is sent to the new owner of the case.
Cases in the EDRS: Medical Professional Role

Creating and Maintaining Cases: Medical Professional Roles

**NOTE:** The initial implementation of EDRS focuses on ‘natural’ deaths only, therefore Medical Examiners are not yet using EDRS.

A medical professional creates the case in EDRS for natural cause deaths. The medical professional is responsible for entering the decedent’s identity and medical information. The funeral firm is responsible for entering the decedent’s other personal information and disposition information, unless a funeral firm is not engaged per the decedent’s will, executor, or family.

Edit/Complete a Case

After you have searched on or started a new case, you need to enter all pertinent medical information for the decedent. If a funeral firm is not engaged according to the decedent’s will, executor, or family, then a medical examiner can complete the decedent personal information.

The steps below pick up from the Start/Edit New Case access. If you need to review how to get to this point, refer to the Basic Navigation: Start/Edit New Case section of this manual.

Medical Certification pages are the same for all medical certifier roles. Additional Medical Examiner functionality is covered in the Additional Tasks for Medical Examiners/Coroners section of this manual.

**Note:** There are variations to access based on medical professional role.

- Medical staff, in addition to the medical certifier, can perform all of the following data entry. Staff, however, are not authorized to certify a case.
- Medical Examiners can complete the Personal Information section if the Will Medical Examiner be responsible for Personal Information? drop-down selection is ‘Yes.’
- Medical Examiners can certify a case without a requested case review by taking control through the ME Review Case page.
- Interns/Residents can certify a case without a medical license; there is a checkbox for Intern/Resident to check and the Certifier information entered is that of the Attending Physician.

**Note:** It is the discretion of the medical facility to define the business process workflow for completing the Medical Certification pages within EDRS, regardless of page access for staff versus certifiers.
<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From the <strong>Decedent</strong> page, click on <strong>Pronouncement</strong> in the <strong>Medical Certification</strong> section of the <strong>Death Registration Menu</strong> (left navigation bar).</td>
<td>The Decedent page is the default page when accessing a case, however, medical professionals are not responsible to update this page unless taking full responsibility for the case. The date, time, and manner of death are entered here.</td>
</tr>
</tbody>
</table>

![Image of the Death Registration Menu](image.png)

2. Enter the required pronouncement information. | **Note:** Any manner of death other than ‘Natural’ requires certification by a Medical Examiner or Coroner. You can enter 9's for the Date and Time of death if unknown, however, it is better to enter the best approximation until specific details are found through examination or testing, as per CDC guidelines. If the date and time are unknown, use the **Time Modifier** drop-down options. The **pronounced** date and time must be exact. Unknown entries are not acceptable. |
3. Click **Validate Page**.  

The page will refresh, displaying error messages for any omitted information or field entries not matching system rules. Make corrections and/or override and revalidate, as necessary.

If you do not click **Validate Page**, you must click **Save** or your entries will be removed when you navigate away from this page.

**Note:** If the **Manner of Death** is anything other than 'Natural,' and you are not a Medical Examiner or Coroner, you will receive an error message and will not be able to certify the case in the EDRS.

4. Click **Next** to go to the **Place of Death** page.

Optionally, you could also move around the case using the page links in the left navigation bar.

Notice the green, yellow, and/or red icons to the right of the page names in the left navigation bar. These appear for all pages once the initial page is validated.
5. On the *Place of Death* page, enter the necessary information not defaulted in from your affiliated facility and **validate** the page.

Facility details for which you are affiliated and logged into default into the fields on this page.

If the death occurred at another location, the *Address* information must be updated. For example, if

- the **Type of Place of Death** selected is ‘private residence,’ the decedent’s home address populates the *Address* section.

- a patient was under hospice care, but in a hospital at the time of death, select ‘Hospice, Hospital’ from the **Type of Place of Death** and leave the defaulted text or retype the hospital address on the case.

- you are affiliated with more than one facility and started the case under the wrong location, you can transfer the case to the correct facility. Refer to the **Transfer Case** steps in the *Other Links* section of the **Basic Navigation: Start/Edit New Case** section of this manual.
The **Medical Record Number** needs to be manually entered.

If you select “Yes” for the **Was Decedent Transferred from Another Institution?** field, the page will refresh and expand for you to enter the previous facility’s information.

If information is unknown make the appropriate selection or enter “Unknown” or “Pending” in the text field.

6. **Click Next** to go to the **Cause of Death** page. For state and federal statistics, it is very important to completely and accurately fill out the cause of death including all intervals and underlying conditions.
7. Complete the *Cause of Death* entries for all known conditions related to etiology associated with the death and the decedent’s prior health situation.

EDRS system checks make sure this information is accurate and complete. There is a table of ‘trauma’ terms cross-checked with the *Manner of Death* on the *Pronouncement* page for consistency. These ‘trauma’ terms may prompt EDRS to recommend that a Medical Examiner or Coroner certify a case.

- Line A in Part I of this page is the immediate cause of the death event.
- Lines B-D are the chain of events leading to the cause of death.

Do not abbreviate.

To assist with these checks and balances, use the **Check Spelling** feature for your entries.

Time intervals are required for each line in Part I.

Part II identifies underlying or other chronic conditions suffered by the decedent. Entries in Part II may or may not have had an impact on the cause of death etiology.

8. Click **Validate Page**.
Step | Comments/Prompts
--- | ---
9. Click **Next** to go to the *Other Factors* screen. | Additional information related to the decedent and his/her death is entered on this screen.

![Image of EDRS interface](image)

10. Complete the remaining information. | Additional information related to the decedent and his/her death is entered on this page.

**Note:** ME Case Number could be filled in here. If the case was referred to a Medical Examiner, the ME Case Number can be entered if known, or will auto-populate when he or she completes the ME Review Case page.

Depending on the Manner of Death, an Injury page may display. You must complete this page if it appears.

11. Click **Validate Page**. | Data entry for the death event is complete at this point.

Identification for the specific medical certifier is required next.

**Note:** If the Manner of Death was anything other than ‘Natural’ and you are not a Medical Examiner or Coroner, you will not be able to certify the case.
Identify the Medical Certifier

The Certifier page in the EDRS identifies the attending physician or medical examiner/Coroner who is certifying the death certificate. This page can be filled out by medical staff along with the other Medical Certification pages, however, certain information on the Certifier page may only be known to the actual certifier.

The Certifier Name and Address information defaults in if the person logged into the EDRS is authorized. If the certifier is a coroner who is not a physician or was not the attending physician, check the appropriate box for Coroner is not a physician or Certifier is not attending physician for additional fields to display. The page expands to allow entry of Coroner’s Physician or Certifier details.

If the Certifier section is blank or needs to be changed, use the Lookup Tool (magnifying glass) to locate the certifier from the EDRS database. All Certifier information will auto-populate when the person is selected.

**Note:** Avoid manually typing in Certifier information, as EDRS will not validate text entries against the database tables, which could result in ‘invalid user’ errors when attempting to certify a case. If information is inaccurate for the certifier, effort should be made to update the user profile in HCS as well as EDRS.
Electronically Certify a Death Certificate

After all Medical Certification pages have been completed and validated, the EDRS allows authorized medical certifiers to electronically certify a death certificate.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. From any page within a case, with completed and validated Medical Certification data entry, click Certify in the left navigation bar.</td>
<td>The Certifier page must be completed within the case prior to the Certify page appearing as an option in the left navigation bar. All Medical Certification pages must have been validated and approved, as noted by green and/or green and yellow icons.</td>
</tr>
<tr>
<td>2. After reading the affirmation statement(s), click the checkbox(s) in front of the text.</td>
<td>Affirmation statements varies slightly, based on the certifier’s medical profession.</td>
</tr>
</tbody>
</table>
Step | Comments/Prompts
--- | ---
3. Click **Affirm**. | A system-generated message displays indicating successful authentication.

At this point – if the case was started by a Funeral Director – the EDRS sends a system-generated notification to the Funeral Director that the medical certification is complete.

If a Funeral Director becomes involved after you started the case, share the EDRS case information with the funeral firm via telephone or email, so they can locate and complete the case information. Confirm and share the decedent’s **name**, as entered in EDRS, the **Date of Death**, and the **Sex**.

If no funeral director is involved in a case, the decedent information must be completed by a Medical Examiner/Coroner. Therefore, the **Will Medical Examiner be responsible for Personal Information?** drop-down selection must be ‘Yes.’ In this case, once decedent information is complete, the case is automatically signed and sent to the Registrar for filing.

---

**Other Links Options**

Additional functions display under the **Other Links** section of the **Death Registration Menu**. Those functions, available for multiple roles, are described in the Basic Navigation: Other Links Options section of this manual. There are no functions limited to medical certifiers and staff in the Other Links section.
Additional Tasks for Medical Examiners/Coroners (future functionality)

**NOTE:** The initial implementation of EDRS focuses on ‘natural’ deaths only, therefore Medical Examiners are not yet using EDRS.

Most EDRS functionality is the same for Medical Examiners and Coroners as for other medical certifiers. When referencing this manual, first review the *Creating and Maintaining Cases in the EDRS: Medical Professional Roles* chapter in this manual.

A Medical Examiner/Coroner may be completing the decedent’s *Personal Information* in lieu of, or prior to, a funeral director’s involvement with the case. Refer to the *Creating and Maintaining Cases in the EDRS: Funeral Professional Roles: Edit/Complete a Case* section in this manual for instruction on completing the *Personal Information* pages.

**Note:** A Medical Examiner may start a case anytime in the EDRS. However, the Medical Examiner must be engaged whenever the *Manner of Death* on the *Pronouncement* page is other than 'natural' regardless of which role starts a case.

Role specific variations and additional tasks are noted below.

**Other Links**

Additional functions display under the *Other Links* section of the *Death Registration Menu*. Those functions available for all roles are described in the *Basic Navigation: Other Links Options* section of this manual. The remaining functions available to Medical Examiners/Coroners are below.

**ME Review Case**

Medical Examiners may start a case in the EDRS, have a case assigned, or be requested to review a case. In certain situations, the Medical Examiner may want to take ownership of a case.
1. After accessing and reviewing a case, click ME Review Case in the left navigation bar. The ME Review Case page displays.

2. Select the appropriate Referral Action from the drop-down list.

Accept Referral: You accept responsibility to review and certify the case.

Decline Referral: You decline the referral and the current medical certifier will certify the case. When declining, type “DEC” in ME Case Number field, if no case number is recorded in your office. A best practice is also to include a reason for refusal.

Pending: You acknowledge the request, however, need to do additional research before accepting responsibility for medical certification.

Take Control of Case: You are aware of the case and take ownership of the case even if it was not referred to you.
3. Click **Save**. You now have the ability to update *Medical Certification* data.

4. Depending on the **Referral Action** selected, proceed to the *Medical Certification* pages to verify previously entered data and make any necessary changes.
   - If necessary, refer to the previous sections in this chapter for assistance.
   - If declined, no further action is required.

---

**Approve or Reject a Cremation Clearance Request**

In certain New York State counties, the Medical Examiner must approve clearance for cremation of the decedent’s remains. This is requested by the owner of the personal information of a case in EDRS. EDRS sends a notification to the appropriate ME/Coroner, by which the ME/Coroner can access the case.

The ME/Coroner can access the case through the *Messages* list or the *Registration Work Queue Summary*.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>After accessing a case where a Cremation Clearance is requested, click <strong>Cremation Clearance</strong> in the left navigation bar. The <em>Cremation Clearance</em> page displays.</td>
</tr>
</tbody>
</table>
2. Select the appropriate Cremation Clearance Status from the drop-down list.

**Requested**: The default status when a cremation clearance is requested. (If you are also the Personal Information owner, this option will not display in the drop-down list.)

**Approved**: You acknowledge and approve the request.

**Pending**: You acknowledge the request, however, need to do additional research before accepting responsibility for medical certification.

**Not Approved**: You reject the request. If not approving the request, you must then complete the Cremation Reject Reason field.
<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>

EDRS sends a notification to the requester identifying your action on the request.
Cases in the EDRS: Funeral Professional Role

Creating and Maintaining Cases: Funeral Professional Roles

For natural cause deaths, the case should be created in the EDRS by a medical professional. The medical professional enters the decedent’s medical information. The funeral firm is responsible for entering the decedent’s personal information and disposition information.

Edit/Complete a Case

After you searched on and opened a case for editing, you need to enter all personal information for the decedent. Cause-of-death information is certified by the attending physician or medical examiner/coroner, but can be data entered by any authorized medical staff.

The steps below pick up from the Start/Edit New Case access. If you need to review how to get to this point, refer to the Basic Navigation: Start/Edit New Case section of this manual.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
</table>
| 1. From the Decedent page, enter the remaining information about the person. | **Note:** If the Will Medical Examiner be responsible for Personal Information? drop-down is ‘Yes,’ pages and fields are only accessible by that medical professional.  
Clicking the link Add/Edit Alias Names opens a pop-up window to add additional names.  
**Note:** The system allows for decedents up to 110 years of age. If the decedent is older than 110 years, you can override the error message that appears when you validate the page.  
If information is unknown make the appropriate selection or enter “Unknown” or “Pending” in the text field.  
EDRS internally validates the Social Security Number for possible duplicates. |

A future enhancement will connect EDRS to the Social Security Administration to verify the number in the SSA database.
Step | Comments/Prompts
--- | ---

The **Home** (house) icon opens a pop-up window to add address information from database lists rather than type in the fields. Optionally, you can begin typing in the **City or Town** name for the **Decedent’s Birth Place** and then select from the list of values.

Be sure to verify your address entries, as there are many localities with similar names, such as the city of Rochester (“Rochester”), the town of Rochester (Rochester Town), and Rochester Junction (“Rochester Junction Hamlet”) in the list of values.

2. **Click Validate Page.**

The page will refresh, displaying error messages for any omitted information or field entries not matching system rules. Make corrections and/or override and revalidate, as necessary.

If you do not click **Validate Page**, you must click **Save** or your entries will be removed when you navigate away from this page.
3. Click **Next** to go to the *Resident Address* page. Optionally, you could also move around the case using the page links in the left navigation bar.

Notice the green and red icons to the right of the page names in the left navigation bar. These appear for all pages once the initial page is validated.

4. Complete the address information for the decedent and **validate** the page.

   A recommended best practice is to enter an address from the largest locality to the smallest (Country, State, County and then City) to filter the list of localities available.

   The **City, Township or Borough** field should be the jurisdiction where the property resides (pays taxes). If the mailing address is different, enter the city, township, or borough of the mailing address in the designated field. This will then appear in 16D on the death certificate.

5. Click **Next** to go to the *Family Members* page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>Complete known information for the decedent’s family and <strong>validate</strong> the page. EDRS will prompt you to verify the <strong>Birth Name of Mother/Parent Last</strong> name if the value entered is the same as the decedent or birth father. This message can be overridden if the name is, in fact, the same as the mother’s married name.</td>
</tr>
<tr>
<td>7.</td>
<td>Click <strong>Next</strong> to go to the <strong>Informant</strong> page. This page identifies the person who is providing the decedent information for the death certificate. This person does not have to have been present at the death.</td>
</tr>
</tbody>
</table>
8. Complete the informant information and validate the page.

9. Click Next to go to the Disposition page. This information identifies how, where, and under whose authority the decedent’s body will be disposed.

If you are logged in as a Funeral Director, your license and Funeral Home information for which you are logged should default into the fields on this page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
</table>
| 10. Enter known information and **validate** the page. | If disposition is by cremation, when you validate the page you will receive error messages at the bottom of the page related to cremation clearance.  
- If cremation clearance is **not** required in your location, simply override those errors.  
- If cremation clearance is **required** in your location, then for now you should override the errors, and use your existing process for obtaining cremation clearance external to EDRS. Depending on your local process, you may need to print and retain a Working Copy of the certificate for purposes of obtaining cremation clearance.  
**Note:** In the future you will be able to request cremation clearance electronically through EDRS using the Cremation Clearance page, but we do not currently use that feature in EDRS.  

The **Funeral Director** and **Funeral Firm** information can be selected - or updated by first erasing the data - to locate the appropriate **Director** or **Firm** using the **Lookup Tool** (magnifying glass).  

**Note:** If the disposition is on **Hold**, enter the filing date for the **Date of Disposition** and the **Place of Disposition** where the body is being held, such as the Medical Examiner’s office, hospital or funeral home.  

*If completing this information through a Medical Examiner role and no Funeral Home is engaged for the disposition, enter “Unknown” for all of the funeral director and funeral home fields.*  

The **Filing Registrar Information** section data will default in when the local Registrar receives and registers a signed and certified case through EDRS. *You should not enter any information in this section unless instructed to do so by a registrar or NYS.*

11. Click **Next** to go to the **Decedent Attributes** page. | This page allows for decedent demographic information for occupation, ethnicity and race. |
12. Enter the decedent’s attributes. In the **Usual Occupation** and **Kind of Business or Industry** fields, indicate the below for each decedent, as applicable:

- a minor and a full time student, specify the level of education.
- a minor and not a student, enter ‘n/a.’
- a homemaker, specify if in own home or another person’s home.
- retired, enter the occupation and industry performed for the majority of his/her adult years.
<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
</table>
| 13.  | Click **Validate Page** to verify all of the information entered to-date is accurate and complete. Any pages not validated prior to this will now be validated. You should see all green icons or a combination of green and yellow (overrides) icons to the left of the page names in the left navigation bar.  
**Note:** A case cannot be signed if there are red icons in the **Personal Information** section of the **Death Registration Menu**. If any pages validated red, navigate to those pages and make the necessary corrections and revalidate.  
Optionally, you can add information to the **Place of Death** page if known, however, this page is primarily the responsibility of the attending medical professional.  
You can now sign the certificate. |

**Electronically Sign a Death Certificate**

After all **Personal Information** pages have been completed and validated, the EDRS allows you to electronically sign a death certificate. This is the recommended format to complete a certificate within the database, provide electronic burial transit permits, and efficiently generate official copies in the future.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From any page within a case with completed and validated <strong>Personal Information</strong>, click <strong>Sign</strong> in the left navigation bar. The <strong>Sign</strong> page will only appear as an option after all <strong>Personal Information</strong> pages have been validated and approved, as noted by green or green and yellow icons.</td>
</tr>
<tr>
<td>Step</td>
<td>Comments/Prompts</td>
</tr>
<tr>
<td>------</td>
<td>------------------</td>
</tr>
<tr>
<td>2.</td>
<td>After reading the affirmation statement, click the checkbox in front of the text. You are attesting to all of the entered information for this case.</td>
</tr>
<tr>
<td>3.</td>
<td>Click <strong>Affirm</strong>. Clicking this box is the equivalent to signing a paper death certificate. A system-generated message displays indicating successful authentication. At this point, the medical information may still need completing. You can notify the certifier through EDRS messaging or contact him/her through traditional ways (i.e., phone call). See the <strong>Other Links</strong> section below for medical referrals. If medical information is also complete, the system automatically sends a notification to the local Registrar that the case is pending registration.</td>
</tr>
</tbody>
</table>

**Other Links Options**

Additional functions display under the **Other Links** section of the *Death Registration Menu*. Those functions available for multiple roles are described in the **Basic Navigation: Other Links Options** section of this manual. The remaining functions for Funeral Firm Directors and staff are below.
Cremation Clearance (limited functionality)

NOTE: At this time, where cremation clearance is required you must request and obtain that clearance outside of EDRS using your current local procedure. For now, funeral firms should override error messages on the Disposition page related to cremation clearance. Depending on your current local procedure, you may need to print and retain a Working Copy of the certificate for purposes of obtaining cremation clearance.

In the future cremation clearance will be able to be requested electronically in EDRS when Medical Examiners/Coroners are added to EDRS.

If the decedent will be cremated, a Cremation Clearance page displays in the Other Links section of the Death Registration Menu. Not all localities in New York State require cremation clearance from a Medical Examiner or Coroner. However, this functionality is available for all personal information owners (Funeral Firm, Funeral Director, or Medical Examiner) once Cremation is selected for the Method of Disposition and the page is saved or validated.

Request Cremation Clearance

Perform one of the following as the Funeral Director or funeral firm staff. If a cremation clearance is

- **Required by your county**, follow the steps below to complete and save the required information to request authorization from the ME/Coroner.

  OR

- **Not required by your county**, simply override the error messages that display on the Disposition page after you validate the case and then revalidate.

NOTE: The following steps describe future functionality, when Medical Examiners/Coroners are using EDRS. You cannot currently request cremation clearance electronically in EDRS.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. After selecting Cremation as the Method of Disposition on the Disposition page, click Cremation Clearance in the Death Registration Menu.</td>
<td>The Cremation Clearance page displays. By default the Cremation Clearance Status field value is ‘Requested.’</td>
</tr>
</tbody>
</table>
2. Complete all of the fields in the Authorizing Individual Name and Authorizing Individual Address sections.

3. Click on the Lookup Tool (magnifying glass icon) to the right of the Office Name field in the Notify ME/Coroner section of the page. You are actually searching for an individual Medical Examiner by name.

Remember the wildcard function (%) is available in the search window if you are unsure about spelling or spacing in the user's name within the database.
4. After entering the full or partial (with wildcard) last name, click the **Search** button. A list of matching names appears.

5. Click **Select** to the right of the desired name. The ME/Coroner name auto-populates the name fields on the *Cremation Clearance* page.

6. Click **Save**. EDRS sends a notification to the ME/Coroner selected, requesting cremation clearance approval and number. Once the ME/Coroner approves or rejects the request, EDRS will send you, the requestor, a notification.
Cancel a Cremation Clearance Request

If you requested cremation clearance, and need to cancel the request, return to the Cremation Clearance page and click the Cancel Cremation Clearance Request link now appearing to the right of the Cremation Clearance Status field. Once that link is clicked, a confirmation box pops up. Selecting OK will cancel the request.

Trade Calls

At times, you may be requested to work with another funeral director. In this case, you still retain ownership of the case, but can allow the secondary firm to electronically update the case in the EDRS.

On the Trade Calls page, selected from the left navigation bar within a case, use the Lookup Tool (magnifying glass) to locate the appropriate Funeral Home in the system. Optionally, you can also select a Funeral Director affiliated with that firm in the lower section of the page. Then, click Save.

In most situations, the secondary funeral firm is outside of New York, therefore the funeral firm is not in the EDRS database. You can type in the funeral home and/or director information into the appropriate fields. To clear any pre-populated fields, click the eraser icon in each section as necessary, then type in the information.

The funeral director designated on the Disposition page retains ownership and signatory authority of the death certificate. Communication with the secondary funeral firm is external from the EDRS, although the trade call funeral firm can access and update the record.
### Cases in the EDRS: Registrar Role

#### Registering a Case

The local Registrar is responsible to verify all the *Personal Information* and *Medical Certification* are complete and accurate for a case. Once the case has been signed by a Funeral Director and certified by an authorized medical professional, the EDRS auto-generates messages and notifications to the filing Registrar, and moves the case into the registrar’s work queue.

Registration of a death is required within 72 hours of the death event in New York State. Registration is also required to generate a burial permit to dispose of the body.

**Note:** Review the [Basic Navigation: Review Workload (Queues and Messages)](#) section of this manual for the best ways to access your workload or specific cases.

If the case information is incomplete or inaccurate, you should reject the case. The EDRS does not have functionality to reject a case. Therefore, you must notify the submitter via telephone or email that changes are required before you will register the case.

#### Register a Case

The local Registrar is responsible to verify all data is accurate and complete before registering a death certificate. Follow the steps to review the information and register a case.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Once a case is accessed, begin by clicking the <strong>Validate Page</strong> button. Expedite case review by validating the case pages first. Pages with missing data or data contradicting system rules will be flagged by the stoplight icons in the <em>Death Registration Menu</em>, or left navigation bar.</td>
</tr>
</tbody>
</table>
2. Review the pages for accurate and complete information. If there is data which could invalidate the death registration, contact the Funeral Firm or Medical Certifier to update the case.

3. Click on Disposition in the left navigation bar. The EDRS requires you to review the Disposition information for accuracy.

4. Click on Identifiers in the left navigation bar. The Identifiers page displays.
5. Leave the **Local File Date** blank. The Local File Date will automatically be filled in when you Affirm the case on the Local Registrar Affirm page. After Affirming, you will be able to edit the Local File Date if necessary.

   If you enter the Local File Date manually before Affirming it, that will cause the case to automatically register too soon.

6. Type the **Registration Number** and validate the page. This is an open-text field. You will need to maintain your local register numbers externally from the EDRS.

7. Click **Local Registrar Affirm** in the left navigation bar.
8. After reading the affirmation statement(s), click the checkbox(s) in front of the text.

9. Click **Affirm**. A system-generated message displays indicating successful authentication.

At this point, the death certificate is registered. EDRS generates messages that the case was approved. The Funeral Firm can print out the Burial Permit at this time.

No changes can be made on the case in the EDRS once registered.
Case Modifications After Registration

The below options are available to registrars after electronically filing a case.

**Reset Allowable Print Quantity**

By default, a maximum of five (5) copies of the **Burial Permit** can be viewed/printed from the EDRS. However, the Registrar can override this default by resetting the print count. On the **Identifiers** page, change the **Number of Permits Printed** value back to zero (0) and click **Save**.

---

**Backdate the Local File Date**

The Registrar has the ability to backdate and save the **Local File Date** to identify cases electronically filed with the state, but actually filed locally outside of work hours by a sub-registrar whom does not have access to EDRS.
For instance, if there was a death on a Saturday, a sub-registrar could issue a burial permit based on a signed Working Copy provided by the Funeral Firm. The following business day, the registrar could access the electronic case, complete the registration and then backdate the Local File Date to reflect that past Saturday’s date.

Note: It is at the local registrar’s discretion to implement and monitor any off-hours policy and procedure. Contact the EDRS Team for guidance.

Modify the Burial Permit Issued By Name

If the burial permit was issued by either another EDRS user or an external sub-registrar without access to EDRS, the Registrar has the ability to enter or modify the Burial or Removal Permit Issued By field to accurately reflect the issuer.

Note: This change can be made prior to state filing or after filing. However, the change should be made before official copies of the death certificate are issued.

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. On the Identifiers page, in the Disposition permit section, click the eraser icon to clear the Burial or Removal Permit Issued By name.</td>
<td>Note: If you have not registered the case yet, these fields will be blank.</td>
</tr>
</tbody>
</table>
2. Click **OK** in the pop-up message to confirm you want to clear the local registrar data.

3. Perform **one** of the following:
   a. Manually type the name of the external (non-EDRS user) sub-registrar who issued the burial permit.
   OR
   b. Click the **Lookup tool** (magnifying glass icon) to select the sub-registrar who issued the burial permit from the list of users.
<table>
<thead>
<tr>
<th>Step</th>
<th>Comments/Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>If you manually typed in a non-EDRS sub-registrar, go to step 6. Otherwise, in the <strong>Lookup Local Registrar</strong> pop-up window, click the <strong>Search</strong> button.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Select</strong> link to the right of the EDRS user who issued the burial permit.</td>
</tr>
<tr>
<td>6.</td>
<td>On the <strong>Identifiers</strong> page, click <strong>Save</strong>. You can confirm the name change by viewing the <strong>Working Copy</strong> of the death certificate from the <strong>Print Forms</strong> option.</td>
</tr>
</tbody>
</table>

**Other Links**

Additional functions display under the **Other Links** section of the **Death Registration Menu**. Those functions available for all roles are described in the [Basic Navigation: Other Links Options](#) section of this manual. The remaining functions available to Registrars are below.
Event and Issuance History

The Event and Issuance History page displays a list of all transactions taken place since the inception of the case.

You can filter the list by deselecting any of the checkboxes at the top of the main window. To review the details of a transaction, click the Detail link in the right column for a specific action.
To view more transactions, either click the **Prev** or **Next** buttons. Alternatively, click the **Return** button to go back to the full list.

**Validate Registration**

The **Validate Registration** page is a summary of all validation errors on the case. Errors can be reviewed, overridden, or fixed from this page, regardless of the page where the actual error exists. Use of this page is recommended after the majority of case data has been entered to better pinpoint errors impinging on certification.
<table>
<thead>
<tr>
<th>Error Message</th>
<th>Override</th>
<th>Go To Field</th>
<th>PopUp</th>
</tr>
</thead>
<tbody>
<tr>
<td>DR_5004: Last Name cannot be left blank. Enter a valid last name for the decedent.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5005: Father’s last name is blank. Enter a valid last name for the Father. The Father’s last name cannot be blank. If unknown, enter “Unknown”.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5006: Mother’s last name prior to first marriage is invalid. Enter a valid maiden last name for the Mother. The Mother’s last name prior to first marriage cannot be blank. If unknown, enter “Unknown”.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5007: Informant’s last name is invalid. Enter a valid last name for the Informant. The Informant’s last name cannot be blank.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5010: Informant’s city cannot be left blank. Enter the informant’s city.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5012: Informant’s address street name cannot be left blank. A valid street name for the informant’s address is required. Enter the street name of the informant’s address. Do not record a route name number or PO Box number. If the name is unknown, enter “Unknown”.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5030: Informant’s address street number cannot be left blank. Enter a valid street number for the informant’s address. Do not record a route name number or PO Box number. If the number is unknown, enter “Unknown”.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5033: Informant’s Postal Zip code cannot be left blank. Enter a valid Zip code for the informant’s residential address.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5040: Informant State and/or country is invalid. Verify entries for informant state and/or country. If Country is “United States”, a state must be entered.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5059: Decedent’s residence city cannot be left blank. Enter the decedent’s city of residence.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5067: Decedent’s residence address street name cannot be left blank. A valid street name for the decedent’s residence address is required. Enter the street name of the decedent’s residence. Do not record a route name number or PO Box number. If the name is unknown, enter “Unknown”.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5068: Decedent’s residence address street number cannot be left blank. A valid street number for the decedent’s residence address is required. Enter the street number assigned to the decedent’s residence. Do not record a route name number or PO Box number. If the number is unknown, enter “Unknown”.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5075: Decedent’s residence zip code cannot be left blank. Enter a valid Zip code for the Decedent’s residence.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5078: High of disposition state and/or country is invalid. Verify entries for High of disposition state and/or country. If country is “United States”, a state must be entered.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
<tr>
<td>DR_5082: Method of disposition cannot be left blank.</td>
<td>[X]</td>
<td>[X]</td>
<td>[X]</td>
</tr>
</tbody>
</table>
## Appendix A: Roles Matrix

The table below identifies the EDRS tasks and which role or roles can perform that task.

* Function available only if you own the case.

<table>
<thead>
<tr>
<th>EDRS Activity</th>
<th>Funeral Director</th>
<th>Funeral Firm Staff</th>
<th>Physician</th>
<th>Medical staff</th>
<th>Medical Examiner</th>
<th>Coroner/ Coroner’s Physician</th>
<th>Registrar</th>
<th>Deputy/Sub-Registrar</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Functions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read Messages</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>View Queue/Queue Summary</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Start/Edit New Case</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Death Search (Locate) Case</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td><strong>Personal Information section</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Decedent Information</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Decedent</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Resident Address</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Resident Address</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Family Members</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Family Members</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Informant Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Informant Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Disposition Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Disposition Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Decedent Attributes</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Decedent Attributes</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Medical Certification section</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Pronouncement Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Pronouncement Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Place of Death Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Place of Death Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Cause of Death Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Cause of Death Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Other Factors Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Injury Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Injury Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Certifier Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Certifier Information</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Certify Case</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EDRS Activity</td>
<td>Funeral Director</td>
<td>Funeral Firm Staff</td>
<td>Physician</td>
<td>Medical Staff</td>
<td>Medical Examiner</td>
<td>Coroner/Coroner’s Physician</td>
<td>Registrar</td>
<td>Deputy/Sub-Registrar</td>
</tr>
<tr>
<td>---------------</td>
<td>------------------</td>
<td>-------------------</td>
<td>-----------</td>
<td>---------------</td>
<td>------------------</td>
<td>----------------------------</td>
<td>-----------</td>
<td>---------------------</td>
</tr>
<tr>
<td><strong>Registrar section</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Identifiers</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Registrar Affirm</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other Links section</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add Comments</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Enter ME Review Case</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Print Forms</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Refer to Medical Examiner</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relinquish Case</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Medical Certification</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer Case</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trade Call</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cremation Clearance</td>
<td>X</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Event and Issuance History</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Validate Registration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Generate Burial Permit</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Processing History</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
## Appendix B: Queue Name Descriptions

EDRS cases are categorized in work queues to help breakdown an individual user’s workload.

Below is a sample list of queue names you may see through the Queue Summary screens.

<table>
<thead>
<tr>
<th>Queue Description</th>
<th>Queue Name</th>
<th>Applies to which Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Pending</td>
<td>Decedent’s personal information is incomplete</td>
<td>Funeral Director or Funeral Firm staff</td>
</tr>
<tr>
<td>Signature Required</td>
<td>Decedent’s personal information is complete, signature is still required</td>
<td>FF, ME/Coroner, MD</td>
</tr>
<tr>
<td>Medical Pending</td>
<td>Medical information is incomplete</td>
<td>ME, MD/Coroner and staff</td>
</tr>
<tr>
<td>Cause of Death Pending</td>
<td>Pending or Pending Investigation was entered on Cause of Death page; needs to be completed with actual death event information</td>
<td>ME/Coroner, MD</td>
</tr>
<tr>
<td>Certification Required</td>
<td>Decedent's medical information is complete, signature is still required for certification</td>
<td>ME/Coroner, MD</td>
</tr>
<tr>
<td>Medical Certification Requested</td>
<td>Medical information is incomplete on a case specifically sent to the medical certifier</td>
<td>ME/Coroner, MD</td>
</tr>
<tr>
<td>Non-Affiliated Medical Certification Requested</td>
<td>Medical certification is requested by a specific medical certifier that is not affiliated with the place of death facility</td>
<td>ME/Coroner, MD</td>
</tr>
<tr>
<td>Late Reason</td>
<td>Date of death has exceeded allowable duration for filing registration</td>
<td>FF</td>
</tr>
<tr>
<td>Referred to ME</td>
<td>Case was referred to the ME, but has not yet been accepted or rejected by the ME.</td>
<td>ME</td>
</tr>
<tr>
<td>Under ME Review</td>
<td>Cases referred to ME and accepted by the ME, not yet completed</td>
<td>ME</td>
</tr>
<tr>
<td>Local Affirmation Required</td>
<td>Cases signed and certified but not yet registered</td>
<td>Registrar</td>
</tr>
<tr>
<td>Coroner Certification Required</td>
<td>Coroner certification is required in addition to a secondary physician</td>
<td>Coroner</td>
</tr>
</tbody>
</table>
Appendix C: Case Status Bar Descriptions

A status bar appears below the decedent’s name in the case header (banner). An example displays below.

Below is a sample list of the status bar options:

<table>
<thead>
<tr>
<th>Term</th>
<th>What it Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Event</td>
<td>Appears on a newly created record</td>
</tr>
<tr>
<td>Personal Valid (with Exceptions)</td>
<td><em>Personal Information</em> section is validated and complete (with overrides)</td>
</tr>
<tr>
<td>Personal Invalid</td>
<td><em>Personal Information</em> section started, but not validated</td>
</tr>
<tr>
<td>Personal Pending</td>
<td><em>Personal Information</em> section started, but not signed</td>
</tr>
<tr>
<td>Unsigned</td>
<td>Has not yet been signed by the Funeral Director or Medical Examiner</td>
</tr>
<tr>
<td>Signed</td>
<td>Has been signed by the authorized Funeral Director or Medical Examiner</td>
</tr>
<tr>
<td>Medical Valid (with Exceptions)</td>
<td><em>Medical Certification</em> section is validated and complete (with overrides)</td>
</tr>
<tr>
<td>Medical Invalid</td>
<td><em>Medical Certification</em> section started, but not validated</td>
</tr>
<tr>
<td>Medical Pending</td>
<td><em>Medical Certification</em> section started, but not certified</td>
</tr>
<tr>
<td>Cause of Death Pending</td>
<td>The <em>Cause of Death</em> page is not yet complete</td>
</tr>
<tr>
<td>Uncertified</td>
<td>Has not yet been signed by the authorized medical certifier</td>
</tr>
<tr>
<td>Certified</td>
<td>Has been signed by the authorized medical certifier</td>
</tr>
<tr>
<td><strong>Coroner Certification</strong></td>
<td>Dual signature designation when coroner is not a physician</td>
</tr>
<tr>
<td><em>(Required)</em></td>
<td></td>
</tr>
<tr>
<td>Not Registered</td>
<td>Has not yet been registered</td>
</tr>
<tr>
<td>Registered</td>
<td>Has been registered at the State and assigned a State File Number (SFN)</td>
</tr>
<tr>
<td>Local Affirmation Required</td>
<td>Has not yet been registered by the local Registrar</td>
</tr>
<tr>
<td>Referred to ME</td>
<td>Has been referred to Medical Examiner; ME now owns the case</td>
</tr>
<tr>
<td>ICD Coding Required</td>
<td>International Classification of Diseases as defined by the World Health Organization for statistical data</td>
</tr>
<tr>
<td>FIPS Coding Required</td>
<td>Federal Information Processing Standards geographic codes used by NCHS for statistical data</td>
</tr>
</tbody>
</table>
Appendix D: EDRS Death Certificate Layout

Below is a sample of the standard Death Certificate issued from NYSDOH. The table translates the certificate fields to their EDRS location by page and field, along with the role who can complete that field.

*Note: Medical Examiners/Coroners can complete the Personal Information if the Will Medical Examiner be responsible for Personal Information? drop-down selection is ‘Yes.’
<table>
<thead>
<tr>
<th>Death Certificate Item #</th>
<th>EDRS Page</th>
<th>Item Description</th>
<th>Who can Complete EDRS Field*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Decedent</td>
<td>Decedent’s Legal Name/Aliases</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Sex</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Date of Birth</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>6 A</td>
<td></td>
<td>Age</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>7 A</td>
<td></td>
<td>Decedent’s Birth Place</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>Served in US Armed Forces</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>12</td>
<td></td>
<td>Social Security Number</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>16 A-F</td>
<td>Resident Address</td>
<td>Resident Address</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>13</td>
<td>Family Members</td>
<td>Marital Status</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>14</td>
<td></td>
<td>Surviving Spouse</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>17</td>
<td></td>
<td>Birth Name of Father/Parent</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>18</td>
<td></td>
<td>Birth Name of Mother/Parent</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>19 A-B</td>
<td>Informant</td>
<td>Informant</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>20 A</td>
<td>Disposition</td>
<td>Method/Date/Place of Disposition</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>22 A,C</td>
<td></td>
<td>Funeral Director</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>21 A-B</td>
<td></td>
<td>Funeral Firm</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>Recorded District/23 A</td>
<td></td>
<td>Filing Registrar/Registrar Name</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>9</td>
<td>Decedent Attributes</td>
<td>Hispanic Origin, Decedent of</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>Race</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td>Decedent’s Education</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>15 A-C</td>
<td></td>
<td>Occupation/Industry/Locality</td>
<td>Funeral Firms, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>3 A,B</td>
<td>Pronouncement</td>
<td>Date/Time of Death</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>26 C</td>
<td></td>
<td>Date/Time Pronounced Dead</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>27</td>
<td></td>
<td>Manner of Death</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>4 A</td>
<td>Place of Death</td>
<td>Type of Place of Death</td>
<td>Funeral Firms, Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>Death Certificate Item #</td>
<td>EDRS Page</td>
<td>Item Description</td>
<td>Who can Complete EDRS Field*</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------</td>
<td>------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>4 B</td>
<td></td>
<td>Date Admitted</td>
<td>Funeral Firms, Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>4 C,D</td>
<td></td>
<td>Facility Name/Address</td>
<td>Funeral Firms, Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>4 F</td>
<td></td>
<td>Medical Record Number</td>
<td>Funeral Firms, Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>4 G</td>
<td></td>
<td>Was Decedent Transferred</td>
<td>Funeral Firms, Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>7 B</td>
<td></td>
<td>Infant Under 1 Year</td>
<td>Funeral Firms, Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>30</td>
<td>Cause of Death</td>
<td>Cause of Death</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>28</td>
<td>Other Factors</td>
<td>Case Referred to ME</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>29 A,B</td>
<td></td>
<td>Autopsy</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>30</td>
<td>Cause of Death</td>
<td>Cause of Death</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>33 A,B</td>
<td></td>
<td>If Female, Pregnancy</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>31 A-F</td>
<td>Injury</td>
<td>Injury Details</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>32</td>
<td></td>
<td>Hospitalized in last 2 Months</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>25 A</td>
<td>Certifier</td>
<td>Certifier Type/Name/Address</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>25 B</td>
<td></td>
<td>Coroner not a Physician</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>25 C</td>
<td></td>
<td>Certifier not Attending</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>26 A</td>
<td></td>
<td>Attending Physician Attended Deceased</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>26 B</td>
<td></td>
<td>Deceased last seen alive by Attending</td>
<td>Medical Certifier and staff, Medical Examiner/Coroner</td>
</tr>
<tr>
<td>23 B</td>
<td>Identifiers</td>
<td>Local File Date</td>
<td>Auto-completed</td>
</tr>
<tr>
<td>Register Number</td>
<td></td>
<td>Register Number</td>
<td>Registrar</td>
</tr>
<tr>
<td>24 A,B</td>
<td></td>
<td>Burial or Removal Permit Issued By/Date</td>
<td>Auto-completed</td>
</tr>
</tbody>
</table>
New York State
Electronic Death Registration System (EDRS)

16.2 Release Notes

December 2016
This document was produced by the New York State Department of Health, Bureau of Vital Records
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16.2 Release Notes

Introduction

The New York State Electronic Death Registration System (EDRS) is being implemented using version 16.2. Pilot areas included Albany, Monroe, Montgomery, Onondaga and Schenectady counties. The pilot window, only included ‘natural’ deaths occurring in medical facilities, began in November 2015 and continued through November 2016.

EDRS will be phased in across New York State in 2016 and 2017. The initial implementation will continue to be limited to ‘natural’ deaths occurring in medical facilities. Any case involving a Medical Examiner or Coroner must be processed outside of EDRS using the manually completed triplicate form.

The Release Notes include new functionality, known system bugs, and acceptable work-arounds to electronically process death certificates.

For questions regarding implementation status, up-to-date self-paced training, or a schedule of upcoming webinar trainings, click here to go to the EDRS public webpage or contact the EDRS Implementation Team via email edrs@health.ny.gov or by telephone through the Call Center at 1-844-866-3377 (EDRS).

Product Description

The New York State Electronic Death Registration System (EDRS) is a secure, web-based application used to electronically register death certificates across New York State (excluding the 5 boroughs of New York City). Access to EDRS is granted through the New York State Health Commerce System (HCS) with accounts for HCS maintained through the Commerce Account Management Unit (CAMU). The database vendor is VitalChek.

The primary purpose of an EDRS is to enable death registration users - funeral firms, hospitals, nursing homes, physicians, and medical examiners and coroners - to file death records electronically with local registration districts and New York State, within the required 72 hour window after a death occurs. All parties involved require access to EDRS with profile configurations carried over from HCS accounts.

An EDRS provides on-line access for all parties involved to work on the same case to complete decedent fact-of-death and cause-of-death information without the need for a physical paper trail.

System Requirements

The following are the minimum requirements for accessing EDRS through the New York State Department of Health’s Health Commerce System (HCS) and processing electronic death certificates in the EDRS. Work with your technical support team to ensure at least the minimum requirements are met at your facility. Recommended software is in bold text below. Full detail of HCS technical requirements are posted on the HCS Browser Requirements web page.
- 4 GB memory
- Windows 7, 8, or 10 Operating System
- Internet Browsers
  o Microsoft Internet Explorer (version 11.0 or higher)
  o Firefox (current stable release, but limited HCS support)
  o Google Chrome (current stable release; Windows platform)
  o Safari 9 (Mac Operating System)
- Adobe Acrobat Reader (9.0 or higher - to view/print forms and reports)
  Note: A browser should not be used as the default viewer for printing burial permits or death certificates.
- Printer
- High-speed internet connection

Note: HCS/EDRS compatible with mobile devices is not guaranteed.

What’s New for 16.2

Release 16.2 is the first fully-functional version of the EDRS for users outside of the NYS Department of Health. Everything included in these release notes is the rollout functionality including known bugs with work-arounds.

NOTE: Initial implementation is only for ‘natural’ deaths occurring at medical facilities. Further investigation is needed to establish Medical Examiner and Coroner HCS accounts and EDRS roles, therefore any case involving a ME/Coroner will have to be processed on the paper triplicate form outside of EDRS.

Enhancements

New enhancements to be aware of, especially for pilot users include.

<table>
<thead>
<tr>
<th>Role</th>
<th>Screen</th>
<th>New Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>General (All Users)</td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Added spacing between names in Field 1 (Name: First, Middle, Last)</td>
</tr>
<tr>
<td></td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Suspended use of Locality field (4D and 16C) checkboxes. Cities will list just the city name. Towns, villages and hamlets will have the appropriate designation in the text.</td>
</tr>
<tr>
<td>Role</td>
<td>Screen</td>
<td>New Feature</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Suspended use of <em>If City or Village, is Residence Within City or Village Limits?</em> (16F) field. Appropriate designations in text of fields 4D, 16C, or 16D as appropriate for case.</td>
<td></td>
</tr>
<tr>
<td>Death Registration Menu</td>
<td>Validation carets changed to colored symbols: green checks, red x’s, and yellow dots</td>
<td></td>
</tr>
<tr>
<td>Home Page system notifications</td>
<td>Mass notifications will be displayed on home page, such as notice of system maintenance, etc.</td>
<td></td>
</tr>
</tbody>
</table>

**Funeral Firm Staff and Funeral Directors**

<table>
<thead>
<tr>
<th>Role</th>
<th>Screen</th>
<th>New Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decedent</td>
<td>New field for <em>If mailing address is different than Resident Address above, enter here</em> to add a mailing address that will appear in 16D after street and number if residence.</td>
<td></td>
</tr>
<tr>
<td>Resident Address</td>
<td>Removal of the Locality and <em>If City or Village, is Residence within City or Village Limits?</em> Fields. The checkboxes in the subsequent fields on the forms will no longer be checked because the type of locality (town, village) will be in the actual name populating the field. Cities have no locality designation in the typed name.</td>
<td></td>
</tr>
<tr>
<td>Informant</td>
<td>‘New York’ and ‘United States’ default for the address on the Informant page.</td>
<td></td>
</tr>
<tr>
<td>Decedent Attributes</td>
<td>New validation rules for <em>Decedent’s Usual Occupation</em> if occupation entered is ‘Student,’ ‘Homemaker,’ or ‘Retired.’ Validation rules match NCHS guidelines.</td>
<td></td>
</tr>
<tr>
<td>Place of Death</td>
<td>New option ‘Hospital, Hospice’. A new dropdown option for the <em>Type of Place of Death</em> to delineate a hospice organization contracted bed/wing within a hospital.</td>
<td></td>
</tr>
<tr>
<td>Cremation Clearance</td>
<td>The <em>Method of Disposition</em> can be ‘cremation’ however, the cremation clearance cannot be recorded in EDRS. Override the error messages appearing on the Disposition page. Complete your cremation clearance through the usual manual process performed prior to EDRS implementation until such time that the Medical Examiners are brought onboard.</td>
<td></td>
</tr>
</tbody>
</table>

**Medical Facility Staff or Medical Certifier (also applies to Medical Examiner (ME)/Coroner role)**

<table>
<thead>
<tr>
<th>Role</th>
<th>Screen</th>
<th>New Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Medical Profession</td>
<td><em>Select Medical Profession</em> page displays to let a user select the appropriate medical profession if no profession carries over from HCS to his/her EDRS user profile.</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Screen</td>
<td>New Feature</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Pronouncement</td>
<td>Time of Death Modifier field with dropdown options to specify disclaimer for reported Time of Death (such as approximate, court defined, etc.)</td>
<td></td>
</tr>
<tr>
<td>Place of Death</td>
<td>Type of Place of Death: New option ‘Hospital, Hospice.’ A new dropdown option for the Type of Place of Death to delineate a hospice organization contracted bed/wing within a hospital.</td>
<td></td>
</tr>
<tr>
<td>Place of Death</td>
<td>Locality field removed</td>
<td></td>
</tr>
<tr>
<td>Certifier</td>
<td>Spelling error in Intern/Resident (if not licensed) field label</td>
<td></td>
</tr>
<tr>
<td>New Edit Rules</td>
<td>New edit rules for the following fields and corresponding pages:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Date Admitted (Place of Death)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Deceased last seen alive by attending physician (Certifier)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Attending physician attended deceased – Start and End dates (Certifier)</td>
<td></td>
</tr>
</tbody>
</table>

**Registrar, Deputy Registrar, and Sub-registrars**

| Identifiers      | Burial Permit Issued by will default user, but after registration can be updated with another sub-registrar’s name either by dropdown option or open text (for non-EDRS user, such as police officer) |
| Identifiers      | Local File Date is editable field after registering case; changed to previous date for burial permit issuance outside of business hours by a sub-registrar that was not processed through EDRS for the burial permit issuance. |

**Fixes**

Below are the fixes since the last release.

<table>
<thead>
<tr>
<th>Role</th>
<th>Screen</th>
<th>New Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>General (All Users)</td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Decedent ‘AKA’ now displaying on death certificate in Field 1. There is a character limit for printing, so check the Working Copy before signing, certifying, or registering.</td>
</tr>
<tr>
<td></td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Country other than US printing in field 7A (City and State of Birth: If not USA, Country and Region/Province) for decedent's Place of Birth.</td>
</tr>
<tr>
<td>Role</td>
<td>Screen</td>
<td>New Feature</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Working Copy</td>
<td>Working Copy</td>
<td>Working copy no longer displays signatures prior to signing, certifying, or registering a case</td>
</tr>
<tr>
<td>Working Copy and Vault Copy of</td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Medical Certifier title now populating in Field 25A (Certification; Certifier Name) for most medical professions.</td>
</tr>
<tr>
<td>Death Certificate</td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Field 24B (Burial or Removal Permit Date Issued) is changing from the actual date it was issued to when it was printed by the Funeral Director.</td>
</tr>
<tr>
<td></td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>Field 32, Was Decedent Hospitalized in Last 2 Months? will be checked appropriately if completed in the corresponding field in EDRS, which was moved from the Injury page to the Place of Death page.</td>
</tr>
<tr>
<td></td>
<td>Working Copy and Vault Copy of Death Certificate</td>
<td>If decedent’s age on the Decedent page is younger than 10 years old or older than 65 and the If decedent was female, was decedent pregnant within the last year? option ‘Not pregnant within the last year’ is selected, the same checkbox is selected in field 33a on the death certificate.</td>
</tr>
</tbody>
</table>

**Funeral Firm Staff and Funeral Directors**

- no fixes specifically for this role; refer to the Enhancements table above for role specific new functionality

**Medical Facility Staff or Medical Certifier**

| Place of Death               | Locality field under Place of Death Address not staying after selected and validated. (This field was removed as part of a new enhancement, so is a non-issue.) |
| Place of Death               | Was Decedent Hospitalized in the Last 2 Months? field now appears on page.                                                                 |
| Cause of Death               | Some trauma terms triggering error messages, prompting certification by an ME/Coroner, have been removed from the trauma word list. |
| Other Factors                | System no longer overrides 'Not pregnant in the last year' selection in the If decedent was female, was decedent pregnant within the last year? when decedent is female and younger than 10yo or older than 65yo. |
| Certifier                    | Spelling error in Intern/Resident (if not licensed) field label |
| Certifier                    | Ability to enter attending physician’s license number in License Number field now enabling if Intern/Resident (If not licensed) box is checked. |

**Registrar, Deputy Registrar, and Sub-registrars**

| Identifiers                  | Register Number saving after typed and validated. |


Known Issues and Problems

The table below identifies all known system bugs with acceptable work arounds.

**Note:** Statewide implementation is starting without involvement of Medical Examiner or Coroner offices. Cases requiring certification from a ME/Coroner will continue to be processed via the triplicate paper form until a future release.

<table>
<thead>
<tr>
<th>Role</th>
<th>Screen</th>
<th>Known Bug/IIssue</th>
<th>Work-Around</th>
<th>Anticipated Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All</strong></td>
<td>Multiple</td>
<td>Fields accept future dates beyond date of death.</td>
<td>Users should be diligent to not enter future dates for past events, such as date last seen by attending physician.</td>
<td>Potential new validation rules</td>
</tr>
<tr>
<td><strong>Funeral User</strong></td>
<td>Decedent</td>
<td>If the combination of decedent name and Alias(es) exceed the allowable number of characters, field 1 on the death certificate will be blank</td>
<td>Be cautious of entering AKAs, limiting entry to those needed for legal reasons.</td>
<td>If this becomes an issue, potential increase in character limit for a future release.</td>
</tr>
<tr>
<td>Role</td>
<td>Screen</td>
<td>Known Bug/Issue</td>
<td>Work-Around</td>
<td>Anticipated Resolution</td>
</tr>
<tr>
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<td>-----------------------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Transfer Case or Trade Call</strong></td>
<td>Funeral firms will not appear in search results if the locality (city, township or borough) is not valid in the Places table (database).</td>
<td>Instead of transferring the case, you can relinquish the case and the new funeral firm can pick it up using the Start/Edit New Case functionality. If attempting to enter a firm for a trade call, contact the EDRS Team for assistance to correct the firm information.</td>
<td>Firm addresses will be fixed as identified.</td>
<td></td>
</tr>
<tr>
<td><strong>Decedent Pages/Burial Permit</strong></td>
<td>No notation in EDRS to enter transportation information if the body is being shipped.</td>
<td>Print burial permit and hand-write the transportation information on the burial permit after conferring with the local registrar.</td>
<td>EDRS Team will research for system change in future release</td>
<td></td>
</tr>
<tr>
<td><strong>Decedent Pages/Burial Permit</strong></td>
<td>No notation on the Burial Permit if the disposition is a donation/anatomical gift.</td>
<td>Manually check the appropriate box on the printed burial permit after conferring with the local registrar.</td>
<td>Future release will check the Removal/Hold checkbox on the burial permit</td>
<td></td>
</tr>
<tr>
<td><strong>Medical User</strong></td>
<td>Certifier</td>
<td>If editing the certifier address and the user mistakenly enters a county in the country field, the county name prints on the death certificate instead of the state. For example, if ‘Monroe’ is entered in the Country field instead of ‘United States’ the death certificate will show “Rochester, Monroe” instead of “Rochester, NY.”</td>
<td>Verify data entry in the certifier address.</td>
<td>n/a</td>
</tr>
<tr>
<td><strong>Registrars</strong></td>
<td>Identifiers</td>
<td>If a Local File Date is entered prior to affirming, the case will automatically</td>
<td>Affirm case first, then enter the Local File Date and save the change.</td>
<td>n/a</td>
</tr>
<tr>
<td>Role</td>
<td>Screen</td>
<td>Known Bug/Issue</td>
<td>Work-Around</td>
<td>Anticipated Resolution</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>register and affirmation will be disabled, so no registrar signature will populate the certificates.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>