



Verifying the Decedent's Social Security Number in EDRS

This procedure is intended for the following roles using the Electronic Death Registration System (EDRS):

- Funeral Directors
- Funeral Firm Staff

Key Points

- Funeral Directors are responsible for submitting the decedent's Social Security Number (SSN) to the U.S. Social Security Administration for identity verification. The verification process has historically been done by sending form SSA-721 to the Social Security Administration.
- EDRS streamlines the SSN verification process by including a link on the *Decedent* page to submit the decedent's information electronically to the Social Security Administration.
- EDRS requires that you at least attempt to verify the decedent's SSN and corresponding identity elements from within EDRS; if you enter an SSN on the *Decedent* page in the EDRS case, then you must click the link to **Verify SSN**.
- The following data fields will be transmitted to the Social Security Administration for online verification:
 - first name
 - middle name (optional)
 - last name
 - sex
 - SSN
 - date of birth

Funeral Directors and Funeral Firm staff are required to attempt to verify the decedent's SSN in EDRS.

Middle name or middle initial may be entered, or you may leave the middle name field blank. But if the decedent has a middle name, it is preferred that you include it.

- For the SSN to be successfully verified, the decedent's first name, middle name or middle initial (if entered), and last name should be entered in EDRS *as they exist in the Social Security Administration's records*. A verification status line on the Decedent page will inform you if the case passed SSN verification, or if not, which data fields disagree with the Social Security Administration's records.
- After achieving successful online SSN verification, the Funeral Director will no longer need to submit a separate verification form to the Social Security Administration.
- You may change and resubmit the data for SSN verification up to five (5) times. If you are *not* able to pass SSN verification with the best data you have available, you should proceed with case signing and registration, and then you will need to send form SSA-721 to the Social Security Administration for them to investigate and verify.

If SSN verification PASSES, you will no longer need to submit form SSA-721 to the Social Security Administration.

If SSN verification still FAILS after multiple attempts at changing data, proceed with registration, and then submit SSA-721 to the Social Security Administration.



Steps to Verify the Decedent's SSN in EDRS

In the steps outlined below we will concentrate on just the six (6) fields that transmit to the Social Security Administration for identity verification:

- first name
- middle name, or middle initial (optional)
- last name
- sex
- SSN
- date of birth

1. Open the case for editing in EDRS, and go to the *Decedent* page.

The screenshot shows a web browser window displaying the EDRS 'Decedent' page. The browser address bar shows the URL: <https://evalcommerce.health.state.ny.us/doh4/applinks/edrs/UI/pag>. The page title is 'Decedent'. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The page header includes 'A GRADY TEST FUNERAL HOME' and 'Welcome back: fddemo3_fn Logout'. The main navigation menu includes Main, Order Processing, Life Events, Queues, Forms, and Help. The page content is for the New York Department of Health and is titled '28903 :Firstname Lastname Jun-06-2017'. A left-hand menu titled 'Death Registration Menu' includes options like Personal Information, Decedent, Resident Address, Family Members, Informant, Disposition, Decedent Attributes, Medical Certification, Place of Death, Other Links, Comments, Print Forms, Refer to Medical Examiner, Relinquish Case, Request Medical Certification, Transfer Case, and Trade Calls. The 'Decedent' section includes a dropdown for 'Will Medical Examiner be responsible for Personal information?' (set to 'No'), a section for 'Decedent's Legal Name' with fields for Firstname, Middle, Lastname, and Suffix, an 'Aliases' section with an 'Add/Edit Alias Names' link, a 'Sex' dropdown (set to 'Male') and a 'Social Security Number' field with radio buttons for 'None' and 'Unknown', a 'Date of Birth' section with fields for Years, Months, Days, Hours, and Minutes, and a 'Decedent's Birth Place' section with fields for City or Town, State, and Country (set to 'United States'). There is also a 'Served in US Armed Forces?' dropdown and a 'Specify Years' field. At the bottom right, there are buttons for 'Validate Page', 'Next', 'Clear', 'Save', and 'Return'. The SSN Verification Status is shown as 'UNVERIFIED (0)'.



- Review the decedent's **first name, middle name, and last name**. Make corrections as needed.

The screenshot shows a web browser window with the URL <https://evalcommerce.health.state.ny.us/doh4/applinks/edrs/UI/>. The page title is "A GRADY TEST FUNERAL HOME" and the user is logged in as "fddemo3_th". The navigation menu includes "Main", "Order Processing", "Life Events", "Queues", "Forms", and "Help". The main heading is "New York Department of Health".

The "Death Registration Menu" on the left includes sections for "Personal Information" (Decedent, Resident Address, Family Members, Informant, Disposition, Decedent Attributes), "Medical Certification", "Place of Death", and "Other Links" (Comments, Print Forms, Refer to Medical Examiner, Relinquish Case, Request Medical Certification, Transfer Case, Trade Calls).

The main form area is titled "32929 :Firstname Lastname Jun-06-2017" and includes a "Decedent" section. A red box highlights the "Decedent's Legal Name" fields: "Firstname", "Middle" (containing "M"), "Lastname", and "Suffix" (containing "2nd"). Below this are fields for "Sex" (Male), "Social Security Number", "Date of Birth", "Age", "Decedent's Birth Place" (City or Town, State, Country), and "Served in US Armed Forces?". At the bottom right are buttons for "Validate Page", "Next", "Clear", "Save", and "Return".

NOTES:

- For SSN to be successfully verified, the decedent's first name, middle name or initial (if entered), and last name should be entered in EDRS as they exist in the Social Security Administration's records.
- The Social Security Administration recommends referring to one of the following documents for the decedent's SSN and legal name:
 - Social Security card
 - Correspondence from the Social Security Administration
 - Medicare card if the number is followed by the designation A, T, TA, M, or M1

Additional documentation that might include the decedent's accurate SSN and/or legal name include a tax statement, bank statement, or marriage certificate. Guidance on this is provided in the pop-up help tooltip on the **Verify SSN** link.



- Middle initial may be entered for purposes of SSN verification, instead of entering the full middle name. You may also process SSN verification with the middle name field left blank, even if the decedent has a middle name. However, if you later change the data in any of key identity fields after passing SSN verification, you will need to resubmit for SSN verification.
- First, middle, and last names can include the following special characters, but *cannot begin* with the special character:
 - apostrophe (')
 - hyphen (-)
 - blank space ()

Any other special characters or numbers in the name should be entered *as a blank space* for purposes of SSN verification.

- The Suffix field is not included in SSN verification, so suffix *can* include a number if applicable. (The name suffix field is typically used for Jr, Sr, I, II, 2nd, 3rd, etc.)

3. Click in the **Social Security Number** field, and enter the decedent's SSN.

The screenshot shows a web browser window displaying the EDRS application. The URL is <https://evalcommerce.health.state.ny.us/doh4/applinks/edrs/UI/>. The page title is "New York Department of Health". The main content area shows a form for "32929 :Firstname Lastname Jun-06-2017". The "Decedent" section is active, and the "Social Security Number" field is highlighted with a red box and contains the value "440-44-0440". Other fields include "Decedent's Legal Name" (First: Firstname, Middle: M, Last: Lastname, Suffix: 2nd), "Aliases" (Add/Edit Alias Names), "Sex" (Male), "Date of Birth" (Age: Under 1 Year, Under 1 Day), and "Decedent's Birth Place" (City or Town, State, Country: United States). A "Verify SSN" link is visible next to the SSN field. At the bottom right, there are buttons for "Validate Page", "Next", "Clear", "Save", and "Return".

NOTE: If you select **None** or **Unknown** instead of entering the SSN, then the **Verify SSN** link will become inactive, and you will not be able to submit the case for online verification.

4. Enter the decedent's **Date of Birth** by either of two methods: Browse and select using the Calendar tool, **or** type in the date in the field as free text in the specified format.



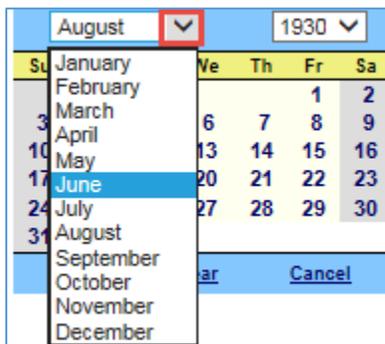
a. Calendar tool method:

Click on the calendar tool.

At the year field in the calendar tool, click the drop-down arrow. Use the scroll bar to locate the year of birth. Click the year to select it.



Then at the month field in the calendar tool, click the drop-down arrow and select the month of birth.



Finally, on the calendar simply click the day of birth.



b. Free text method:

Click in the **Date of Birth** field, and enter the date (type it in) as *all numbers*, no dashes, slashes, or spaces. Enter the date as two-digits for month, two digits for day, four digits for year, as shown below:

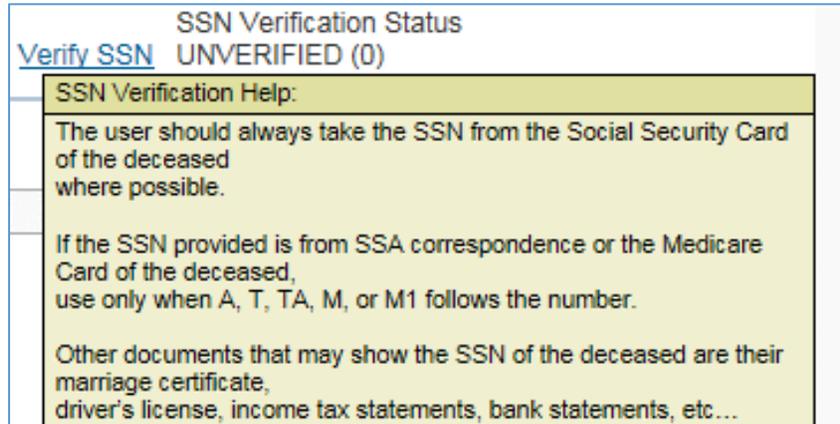
When you click or tab to another place on the page, the date format will automatically convert to the EDRS standard date format.

5. When finished entering the Date of Birth, click the **autofill icon** to automatically populate the **Age** fields. Notice that the Date of Birth format now changes to the EDRS standard date format: Jan-01-1930.

6. Click the link to Verify SSN.

NOTES:

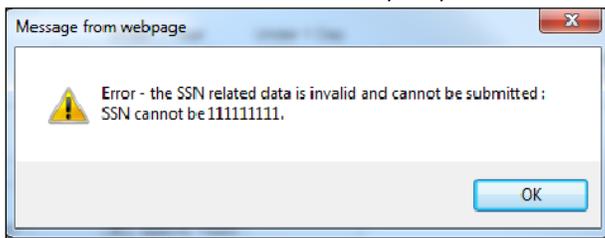
- Clicking **Verify SSN** is a required action in EDRS. If you do not attempt to verify the SSN you have entered, then you will receive an error message when you validate the page.
- When you have **Tooltips** turned on, you will see field help pop up as you place your mouse over the **Verify SSN** link. The field help tooltip is guidance from the Social Security Administration on the best documents to refer to for accurate SSN and the decedent's legal name.



To turn on tooltips, at the top of the window click **Help > Show Tooltips**.

- Before clicking Verify SSN, the **SSN Verification Status** next to the Verify SSN link will display as **UNVERIFIED**.
 - The number in parentheses next to the SSN Verification Status indicates how many times this case has been submitted for verification. You can edit, save, and then resubmit a case up to five (5) times. *When no more attempts remain, a message will display next to the status indicating that the number of allowable attempts has been exceeded.*
7. If the SSN entered contains invalid characters or is missing some numbers, an error message will appear.

Below is an example of the type of error message you could see for invalid characters. Omitting the decedent's first or last name, sex, or date of birth will result in a similar error message.



Click **OK** to close the error message box.



- As needed, edit the field noted in the error message. Then click the **Save** button or **Validate Page** button to save your changes in the EDRS database. *You need to save your changes* at this point to re-activate the **Verify SSN** link.
- Click **Verify SSN** again. If no information is missing, and the SSN entered does not contain invalid characters, the following six (6) data fields will be sent to SSA for identity verification:

- First name
- Middle name or middle initial (optional – may be left blank)
- Last name
- Sex
- SSN
- Date of Birth

The SSN Verification Status changes to **PENDING** while verification is in progress.

*If you change data in any of the 6 key identity fields after passing SSN verification, you will need to click **Verify SSN** again.*

NOTES:

- If any of those key identity elements are different from what the Social Security Administration has, then the SSN will not pass verification.
- The exception to this is middle name, which can be entered as just the middle initial, or it can be left blank even if the decedent has a middle name. However, it is preferred that you enter the middle name if possible.

*Verification may take several moments. While status is **PENDING**, you may continue working in the case. You can even move on to another page. However, you may **not** edit the six (6) key identity fields that are in the process of being verified.*

- Refresh the page** to check for SSN Verification Status update – After a few moments, if SSN Verification Status is still **PENDING**, refresh the page by clicking **Validate Page** to see if an updated status is available.

You may also refresh the page by navigating to another page and then back to the Decedent page, or by clicking your browser Refresh button , usually located at the top of the window near the address line.



- We now see the status is FAILSSN (1), indicating that SSN Verification has failed on the first attempt; the SSN entered does not match the Social Security Administration's records for this person.

The screenshot shows a web browser window with the URL <https://evalcommerce.health.state.ny.us/doh4/applinks/edrs/UI/>. The page title is "Decedent". The header includes "A GRADY TEST FUNERAL HOME" and "Welcome back: fddemo3_fn Logout". The main navigation menu includes "Main", "Order Processing", "Life Events", "Queues", "Forms", and "Help". The page content is for "New York Department of Health" and shows a "Death Registration Menu" on the left. The main form area is titled "32929 :Firstname M Lastname Jun-06-2017" and includes a "Decedent" section. The "Decedent" section contains the following fields and options:

- Will Medical Examiner be responsible for Personal information?
- Decedent's Legal Name: First (Firstname), Middle (M), Last (Lastname), Suffix
- Aliases: Add/Edit Alias Names
- Sex:
- Social Security Number:
- Date of Birth:
- SSN Verification Status: **FAILSSN (1)** (highlighted in a red box)
- Decedent's Birth Place: City or Town, State, Country (United States)
- Served in US Armed Forces? Specify Years

At the bottom right of the form are buttons for "Validate Page", "Next", "Clear", "Save", and "Return".

FAIL statuses could include the following:

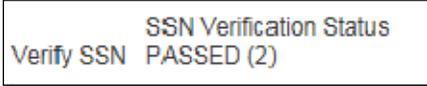
Status	Description
FAILDOB	Date of birth does not match SSA information for this person.
FAILDOBGENDER	Date of birth and Sex do not match SSA information.
FAILGENDER	Sex does not match SSA information.
FAILNAME	Some part of the First, Middle, or Last Name does not match SSA information.
FAILSSN	Social Security Number does not match SSA information.

- If you are able to locate accurate information, make the correction in the fields on the Decedent page, and save your changes by clicking **Save** or **Validate Page**. The **Verify SSN** link will become an active link again, unless all five (5) verification attempts have already been submitted.



NOTE: If **Verify SSN** is *not* an active link and the case has been submitted fewer than five (5) times for verification, then no changes have been entered and saved since the last verification attempt. You need to change data in at least one of the key identity fields and then **Save** or **Validate Page** to re-activate the link to Verify SSN.

When SSN Verification has been successful, the SSN Verification Status will be **PASSED**.



The case is ready to be completed. Remember to Validate each page and address any additional error messages.

Making Corrections after SSA Is PASSED

After SSN Verification Status is PASSED, if you change any part of the decedent's name, date of birth, or sex, then the verification status will change back to **UNVERIFIED**, and you will need to **Verify SSN** again.

After achieving SSN Verification Status of PASSED, the *Social Security Number cannot be edited* - it will be grayed out. If you discover the SSN is incorrect, then you may proceed with registration, but you will need to submit a correction to the local registrar, as well as submit form SSA-721 to the Social Security Administration using the correct SSN.

What if SSN Verification Still FAILS?

If you have obtained and entered the decedent's key identity information from an official document, but you still get a FAIL status on SSN verification, then it could be that the Social Security Administration has the decedent's name entered slightly differently from how it is entered in EDRS.

If SSN Verification still FAILS after you have confirmed to the best of your knowledge that the decedent's information is entered correctly, then there is no need to hold up registration. You should complete and electronically sign the case as usual.

If you are NOT able to achieve SSN Verification Status of PASSED, then you also need to submit form SSA-721 to the Social Security Administration.

Social Security Administration System Downtime

You may occasionally encounter Social Security Administration system downtime when online SSN verification is not immediately available for processing. You may continue working in EDRS during Social Security Administration downtime, including signing and registration, if necessary. However, there could be a delay in processing SSN verification during that time.



Scheduled SSA Downtime:

The SSA system has scheduled downtime every night for database maintenance. The current downtime schedule is as follows:

Monday through Friday: 11:00 p.m. – 3:00 a.m.
Saturday 9:00 p.m. – 6:00 a.m. Sunday
Sunday 8:00 p.m. – 3:00 a.m. Monday

- If you click **Verify SSN** during scheduled SSA downtime, then when you refresh the page you will receive an SSN Verification Status of **SSADOWNTIME** (instead of PENDING).
- Your original request will be automatically processed when the scheduled downtime has ended.
- You do NOT need to resubmit your verification request unless you later change the decedent's key identity information (name, sex, date of birth, or SSN).
- Although SSADOWNTIME does not affect your ability to continue working in EDRS, once you submit for verification during a scheduled SSA downtime you will not be able to edit the six (6) key identity fields on the Decedent page until after the scheduled downtime has ended and the SSA system has returned its verification results to EDRS on the **SSN Verification Status** line.

Unscheduled SSA Downtime:

The SSA system might also infrequently encounter a brief, unscheduled outage.

- If you click **Verify SSN** during unscheduled SSA downtime, then the application will automatically keep trying to submit your verification request to the SSA system until it can complete the request and send back the results in the SSN Verification Status.
- You do NOT need to resubmit your verification request unless you later change the decedent's key identity information (name, sex, date of birth, or SSN).
- If the SSA system has a more extended downtime, automatic resubmittal could time out after multiple retries, displaying an SSN Verification Status of **RETRYTIMEOUT** when you refresh the page.
- If you see SSN Verification Status of **RETRYTIMEOUT**, then you should try resubmitting for SSN verification *in about an hour*.
- RETRYTIMEOUT will NOT count toward your five (5) allowable verification attempts.



*If you need to proceed with signing and registering a case while you still have a verification status of **SSADOWNTIME**, **PENDING**, or **RETRYTIMEOUT**, you should validate the page and proceed. Then after the downtime is over you will need to go back into the case to check the **SSN Verification Status**.*

- *If the case is already registered and you find that you received **SSN Verification Status** of **PASSED**, then you will **not** need to submit SSA-721 to the Social Security Administration.*
- *However, if the case is already registered and you received a **SSN Verification Status** of **FAIL**, then:*
 1. *try to obtain correct information for the item identified in the FAIL message,*
 2. *submit form SSA-721 to the Social Security Administration, and*
 3. *if any data needs to change, submit a correction for the death certificate to the local registrar.*