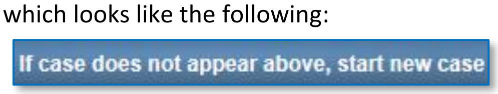
Log In and Launch EDRS

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** in your *My Applications* list. (If you don't see the link, refer to the steps in this guide to *Add EDRS to HCS My Applications*.)
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 that the case is 'owned' by, or you cannot access the case.

Search for a Case You Do Not Yet Own – *Start/Edit New Case*

Most cases in New York State are created by the medical facility, not the funeral firm. Therefore, you are usually searching to take ownership of an existing case's personal information rather than starting a new case. Begin by searching for the case in EDRS:

1. Select ***Life Events*** > ***Death*** > ***Start/Edit New Case*** in the menu bar or click the **Death Start/Edit New Case** *Fast Links* button.
2. Enter the required information for the decedent's **First** and **Last** names, **Date of Death**, and **Sex**.
3. Click **Search**.
4. On the *Search Results* page:
    a. If you find the case in the search results, click the ***Decedent's Name***, which is a link directly into the existing case.
    b. If you do *not* find the case in the search results, check with the medical provider to confirm how the decedent's information was entered in EDRS, and then try searching again.
    c. If you find the case in the search results but the name is not an active link, this means the case is either already owned by a different funeral firm, or the case has been Dropped to Paper or Abandoned. (If owned by a different funeral firm, it may need to be transferred to your firm.)
    d. *If you are certain* the case has not yet been created in EDRS, click the **Start new case** button, which looks like the following:

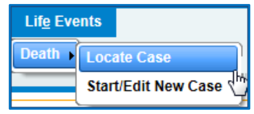
    

    Review the pop-up message to confirm you intend to create a new case, and then click the **Create Entirely New Case** button.

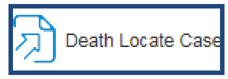
NOTE: After the case has been created and is owned by your office, you can use **Locate Case** to access the case for continuing work on the case.

Locate Case to Find a Case You Own

1. Select ***Life Events*** > ***Death*** > ***Locate Case*** from the menu bar,

    or click the *Fast Links* **Death Locate Case** button.

2. Enter some of the decedent's information, such as **First** or **Last** name, **Date of Death**, or a portion of the name along with the **wildcard (%)**. You need only give a small amount of search criteria.
3. Click **Search**.
    If you are unsure of the spelling of the decedent's name, you can click the **Soundex** button instead of **Search**, to expand your search to include cases with similar letters or sounds.
4. Click the ***Decedent's Name***, which links directly into the existing case.

Validation Symbols and Rules

Validate each page after entering the requested information. The system checks for errors. A validation symbol appears to the left of each page in the *Death Registration Menu* on the left side of the screen. The validation symbol must be either **green** or **yellow** to **Sign** the certificate.

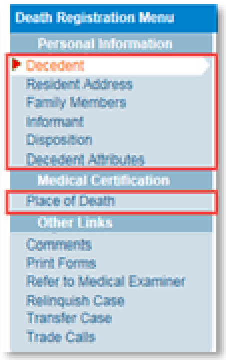
✗ Red X: Information is still needed on this page; it is incomplete.

● Yellow dot: Information is complete on this page; however, some field errors were overridden. This may happen if information entered conflicts with system rules. After saving overrides and re-validating, the page is still marked with the yellow dot on the *Death Registration Menu*, the overridden error messages remain on the page, and the affected field(s) remain shaded yellow.

✔ Green check: Information is complete and acceptable for this page.

Enter Death Certificate Information

1. Complete *and validate* each page in the *Personal Information* section.
2. If the *Place of Death* in the *Medical Certification* section has not already been completed by the medical certifier, you may enter that information if known.



3. On the *Disposition* page, verify that the **Filing Registrar Office** has been filled in and is accurate based on the *Place of Death*. Edit if needed.
4. If necessary, notify medical personnel to complete and certify the *Medical Certification* section.
5. Click **Print Forms** and review a *Working Copy* of the death certificate to confirm that all necessary information is displaying/printing and is accurate. The Working Copy link is **Print Working Copy of Certificate – For Draft Review**.

   An Adobe Acrobat Reader message will likely pop up at the bottom of the window for you to select if you want to open and print or save the Working Copy. Click *Open* to view the certificate.
6. After all information is entered and passed validation, examine the case status bar at the top of any case page:

   Confirm that the case has been *Certified*; if it's not, the status bar says *Uncertified*. Also check that the status bar says *Personal Valid* or *Personal Valid with Exceptions*. *Personal Valid with Exceptions* means there is one or more overridden error message(s) on *Personal* pages.
7. After the case is *Certified* and has a status *of Personal Valid* or *Personal Valid with Exceptions*, click on the *Sign* page that now appears in the *Personal Information* section of the *Death Registration Menu*.
8. Read the **Affirmation** statement, then click in the checkbox next to the affirmation statement to attest that the information in the case is accurate, true, and complete.
9. Click the **Affirm** button. You have now entered your electronic signature into the case.

After the case is both medically *Certified* and *Signed* by the funeral director, the case automatically goes to the local registrar for review and registration.

View Your ***Work Queue Summary***

You can use your **Work Queue** to monitor your tasks on the cases you own. The *Registration Work Queue Summary* gives you easy access to all your active cases in all phases of completion.

1. Click the **Registration Work Queue Summary** button or select ***Queues*** > ***Registration Work Queue Summary*** from the menu bar.
2. On the *Registration Work Queue Summary* page, click on the desired **Queue Name** (workflow category).
3. Click on the **Registrant** (decedent name) to access the case.

Change Case Ownership to a Different Funeral Firm

If a case is owned by a funeral firm but needs to permanently change ownership to a different firm or facility, follow the steps below.

Relinquish Case

Funeral director who currently owns the case:

1. Use ***Death > Locate Case*** to search for and open the case.
2. Click **Relinquish Case** in the *Other Links* section of the left navigation bar. In the pop-up box click **OK**.

Funeral director becoming the new owner of the case:

1. After logging into the office taking ownership, select ***Death > Start/Edit New Case*** to search for the case.
2. On the *Death Search Results* page, click the hyperlinked **Decedent's Name** to open the case.
3. A pop-up message asks you to confirm that you want to take ownership of the case. Click **OK**.
4. On the *Disposition* page, verify and edit as necessary, the funeral director and funeral firm name and location.

Transfer a Case

If you need to transfer a case you started to another funeral director or medical professional,

1. Access the case in EDRS.
2. Click *Transfer Case* in the *Other Links* section of the left navigation bar.
3. Check the **Transfer Personal Ownership To:** box.
4. Click the eraser (pencil icon) to clear your firm as owner.
5. Use the **Look-up** tool (magnifying glass icon) to locate the new owner of the case.
6. Add any notations to the message and click **Save**.

Process a ***Trade Call***

The current Trade Calls function in EDRS is limited, requiring that both involved firms have access to EDRS to complete the case. A Trade Call can be established in EDRS while the case is not signed. If already signed, you must Unsign before proceeding.

1. The funeral firm hired by the decedent's family takes ownership of the case in EDRS. (use ***Start/Edit New Case*** to search for the case, and then open the case and take ownership.)
2. Click **Trade Calls** in the *Other Links* section of the *Death Registration Menu*.
3. Use the Lookup tool to locate and select the funeral director who is performing the Trade Call for your firm – i.e., the funeral director who is handling the preparation and disposition.
4. Click **Save**, then click on another page in *the Death Registration Menu* to remain in the case.

The Trade Call funeral director can now access, complete, and **Sign** the case. The original firm retains ownership of the case, while the Trade Call function has given case access to the Trade Call funeral director who is not directly affiliated with the firm that owns the case. When completed, the *Death Certificate* identifies the Trade Call funeral director as the funeral director handling the case, and the *Burial Permit* and *Death Certificate* identify the funeral firm that owns the case.

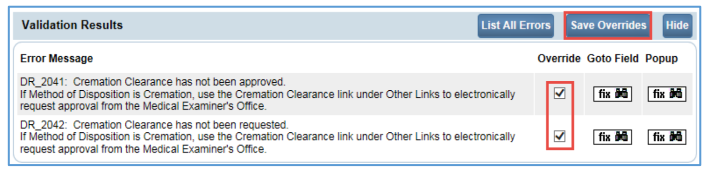
Print Forms

- **Print Working Copy of Certificate – For Draft Review**: You should always generate a *Working Copy* before Signing to verify the accuracy and completeness of the case. The *Working Copy* contains a side-margin 'watermark' noting that it is not the official death certificate. If the case has already been Certified and Signed, the *Working Copy* includes those two electronic signatures. The local registrar's signature never prints on the Working Copy. Set your printer properties to *Fit to Page/Shrink to Fit*, so that the entire form prints out on letter-sized paper.
- **Burial Permit**: Can be printed after the case has been signed/registered by the local registrar.
- **Drop to Paper**: Stops all electronic processing of the case, converting it to a paper version. The Drop to Paper print-out becomes the official death certificate. The case cannot be completed electronically by anyone after this is selected. Drop to Paper should only be used if the next person who needs to work on the case in not able to use EDRS at this time. Drop to Paper is only available while the case has just one owner and has been Certified or Signed by that one owner. Set your printer properties to *Fit to Page/Shrink to Fit*, to print on letter-sized paper.

Handle Cremation Clearance

Certain registration districts in New York State require Cremation Clearance from a Medical Examiner before the case can be registered. When *Cremation* is the **Method of Disposition** specified on the *Disposition* page in EDRS, upon validating the page two error messages display pertaining to the cremation clearance process.

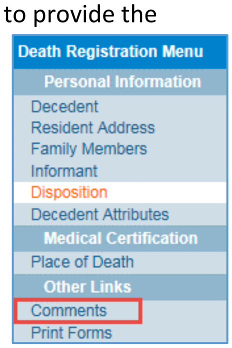
Cremation clearance is currently being processed manually, external to EDRS. Therefore, all cremation cases need to apply an "override" on the two error messages, even in districts that do require cremation clearance.



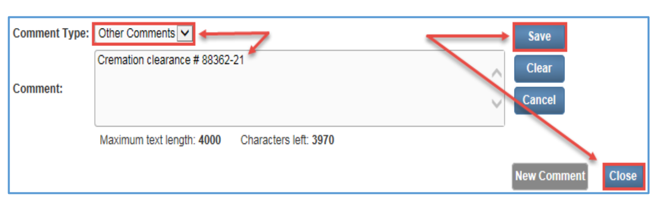
To override the error messages, click in the two Override boxes to select them, click **Save Overrides**, then **Validate Page** again. The validation indicator on the *Death Registration Menu* **remains yellow** to indicate that the page **has passed validation** with overrides.

In districts where cremation clearance is **not** required, no further action is needed after overriding and re-validating the two cremation clearance error messages.

In districts where cremation clearance **is required**, use your existing process for obtaining clearance from the medical examiner. You probably need to provide the medical examiner with a Working Copy print-out of the death certificate. After the medical examiner approves the cremation, you should document the approval in a **Comment** in EDRS. To create your comment, click **Comments** in the *Death Registration Menu*, under *Other Links*.



Then click **Create a New Comment.** Select Comment Type: **Other Comments** and enter the information about the cremation clearance. Click **Save**, and then click **Close**.



Make Corrections After Signing, Before Registered

Before a case is Registered, corrections can be made electronically in EDRS (if the case has not been Dropped to Paper, which stops all electronic processing of the case).

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 *Sign* page and click **Unsign**.
3. Click **OK** in the confirmation message pop-up box.
4. Make necessary changes and click **Validate Page**.
5. Go to the *Sign* page, then read the **Affirmation** statement and click on the checkbox.
6. Click **Affirm**.

Note: After the case is Registered, any needed corrections are to be submitted to the Local Registrar on paper.

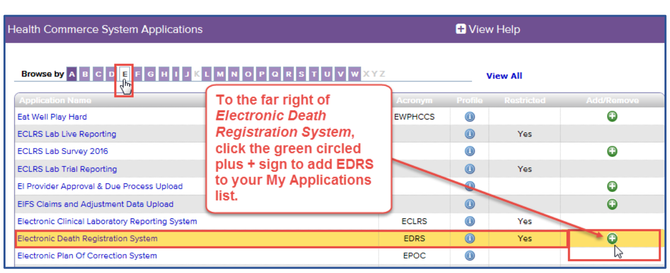
Add EDRS to HCS *My Applications*

If EDRS is not listed in *My Applications* on the HCS Home page, then you can add it to your list.

1. In the top menu bar in HCS, click **My Content**, and then click **All Applications**.

2. On the *Health Commerce System Applications* page, click **E** in the **Browse by** line above the application list. Then find **Electronic Death Registration System** in the list.

3. In the far right column click the green circled plus sign to add the application to HCS Home page.



Return to the HCS Home page. EDRS is now listed in *My Applications*.

Things to Remember

Select the right office – If you are affiliated with more than one medical facility, be sure you select the appropriate office when signing into EDRS. The ME/Coroner's office is the County Department of Health.

Once a case has been created in EDRS, it cannot be deleted. The New York State process is for the medical facility or medical examiner/coroner to create the case, and then the funeral director later takes ownership of the *Personal Information* in the case.

Validation results – If an error message displays but the data is valid, click on the **Override** checkbox, click **Save Overrides**, then **Validate Page** again. The validation indicator on the *Fetal Death Registration Menu* **remains yellow** to indicate that the page has passed validation with overrides, and your overridden error message(s) remain visible.

Changes after error Override – If you change information after overriding errors, you may need to uncheck the **Override** checkbox(es) and click **Save Overrides** again. Click **Validate Page** again, and then recheck and save any remaining errors that still need to be overridden. Re-validate the page.

Don't type; look it up – Avoid typing text in fields that have the **Look-up** tool or the **Places Look-up** icon available. Search using the **Look up** tool and add a wildcard character (%) before and/or after your search text to find more possible results.