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.
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.

Search for a Case You Do Not Yet Own – Start/Edit New Case
The majority of cases in New York State are created by the medical facility, not the funeral firm. Therefore, you will usually be 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. Click the Death Start/Edit New Case Fast Links button or use the menu bar to select Life Events > Death > Start/Edit New Case.
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 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:

   ![Start new case button]

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

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.

Return to a Case You Already Own – Locate Case
Use this feature to find cases you/your firm already owns in EDRS.
1. Select Life Events > Death > Locate Case from the menu bar, or the Death Locate Case button in the Fast Links on the EDRS home page.
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 % character. 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 that have many of the same letters or sounds, but not exactly the same spelling.
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 will check 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 will still be 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. Review a Working Copy of the death certificate to confirm that all necessary information is displaying/printing and is accurate. To access the Working Copy, click Print Forms in the left navigation menu under Other Links, then click 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 or Save the Working Copy. Click Open to view the certificate. If desired, you may print the Working Copy after it is open.
6. After all information is entered and passed validation, examine the case status bar at the top of any case page:

| Personal Valid | Medical Valid with Exceptions | Not Registered | Unsigned | Certified |

Confirm that the case has been Certified; if it’s not, the status bar will say 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 Overrides on error messages 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. 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 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 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 to link directly into the case.

Change Case Ownership to a Different Funeral Firm – Relinquish Case

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.

Funeral director who currently owns the case:

1. Sign into EDRS and select the Office that currently owns the case.
2. Use Death > Locate Case to search for and open the case.
3. 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. Sign into EDRS and select the Office taking ownership of the case.
2. Use Death > Start/Edit New Case to search for the case.
3. In the Search Results, click the hyperlinked decedent name to open the case.
4. A pop-up message will ask you to confirm that you want to take ownership of the case. Click OK.
5. On the Disposition page, verify that the funeral director and funeral firm name and location are correct. If changes are needed, use the eraser icon to remove the current information, and use the lookup tool to select the correct person/firm.
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.

1. The funeral firm hired by the Decedent’s family takes ownership of the case in EDRS. (user Start/Edit New Case to search for the case, and then open the case and take ownership.)
2. Click Trade Call in the Other Links section of the Death Registration Menu.
3. Use the Lookup tool to locate and select the funeral director who will be performing the Trade Call for your firm – i.e., the funeral director who will be 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 will identify the Trade Call funeral director as the funeral director handling the case, and the Burial Permit and Death Certificate will 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 of each case 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 will include those two electronic signatures. It will never include the local registrar’s signature, even if generated after the case has been registered.

- **Burial Permit:** Can be printed after the case has been signed/registered by the local registrar.

- **Drop to Paper:** Stops all electronic processing and registration of the case, converting it to a paper version using the Drop to Paper print-out as 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 hot 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.

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 you will receive two error messages pertaining to the cremation clearance process.

Cremation clearance is currently being processed manually, external to EDRS. Therefore, all cremation cases will 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 will remain 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 will 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.
Making Corrections After Signing, Before Registered

Before a case is Registered, corrections can be made electronically in EDRS (as long as 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.

Things to Remember

If you are affiliated with more than one Funeral Firm, be sure you select the appropriate office when signing into EDRS.

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

To override an error message, click in the Override box to select it, click Save Overrides, then Validate Page again. The validation indicator on the Death Registration Menu will remain yellow to indicate that the page has passed validation with overrides.

If you change data on a page after saving error overrides, you may need to:

1) uncheck the overrides,
2) save overrides with them unchecked,
3) validate the page again, and then
4) re-check any remaining errors that need override, re-save the overrides, and then re-validate the page.

Avoid typing text in fields that have the Lookup Tool or Places tool available. Free-typed data may not pass validation. Tip: for broadest search in the Lookup Tool, add a wildcard % character before and/or after your search text to find more possible results.