

### Log In and Launch EDRS

1. Log in to HCS at [https://commerce.health.state.ny.us/public/hcs\\_login.html](https://commerce.health.state.ny.us/public/hcs_login.html)
2. Enter your **User ID** and **Password**, then click **Sign In**.
3. On the *My Applications* list click **EDRS**. (Click directly on the letters **EDRS**.)
4. On the *Select your Office* page, click on your County Department of Health as your office.

#### Notes:

- If your County Department of Health is not listed on the *Select your Office* page, click the link at the bottom of the page, **Click here if profession or office not found**, to import any new EDRS role/office assignment from HCS.
- If your County Department of Health is still not listed on the *Select your Office* page, then contact your HCS Coordinator to assign you a role in that office. If you need help identifying your current HCS Coordinator, contact the EDRS team via email at [edrs@health.ny.gov](mailto:edrs@health.ny.gov) or by phone at 1-844-866-EDRS (3377).
- Case ownership in EDRS is by office/facility. All EDRS users in that office can access and edit the case.

### Access Options

In EDRS there are two ways that a case can come to the ME/Coroner's office electronically. These two methods are explained in this document.

**ME Review Case > Accept/Decline** a referral when a medical facility has created the case and then transferred ownership to you using **Refer to Medical Examiner**. You receive a link to the case in your **Messages**, where the **Message Text** begins:

Coroner/Medical Examiner: Please Take Ownership of Case ID

**Non-Affiliated Certification Request Review > Accept/Decline** a request for medical certification if you are a Medical Examiner or medically licensed Coroner. A non-medically licensed Coroner owns the case and shares ownership of the case with you by using **Request Non-Affiliated Medical Certification**. You receive a link to the case in your **Messages**, where the **Message Text** begins:

Non-Affiliated Medical Certifier: Please review and complete medical certification for:

#### **ME/Coroners can also**

**Start a new case**, or pick up an existing unowned case, using the **Start/Edit New Case** functionality without receiving a case from another party.

**Take control of a case** using the **ME Review Case > Take Control of Case** option to transfer case ownership to your ME/Coroner office.

### Create a New Case (or Find an Existing Case) using **Start/Edit New Case**

1. Select **Life Events > Death > Start/Edit New Case** from the top menu bar,



or click the **Fast Links Death Start/Edit New Case** button.



2. Enter the required information for **First name**, **Last name**, **Date of Death**, and **Sex**. (outlined in red on the page.)
3. Click **Search**. (Note: Searching first ensures the case was not already created, preventing a duplicate case.)
4. On the *Search Results* page:
  - a. If you find the case listed in search results, click on the **Decedent's Name** to open the existing case. The decedent's name links directly into the case.
  - b. If you do not find the case in the search results, and you are certain the case was *not* already created in EDRS, then click the **Start New Case** button. The full name of the **Start New Case** button is "If case does not appear above, start new case."

If case does not appear above, start new case

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 the ME/Coroner's office, you can use **Locate Case** to access the case in the future. You may also access the case from a *Registration Work Queue* until the case is Certified and/or Registered.

## Accept, Decline or Take Control of a Case via ME Review Case

If a case was already created by a medical facility and then **transferred** to you electronically using the *Refer to Medical Examiner* function, you receive a **message** linking you to the referred case.

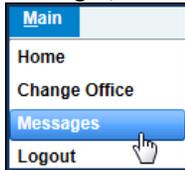
Alternately, if a case was created by a medical facility and **has not been referred/transferred** to you, you can search for the case and take ownership of it on your own.

In both situations you cannot edit the case until you take an **ME Review Case** action.

**Note:** Do **not** use this feature for cases that are owned by a Coroner requesting **Non-Affiliated Medical Certification**.

### Access the Referred Case:

1. Perform **one** of the following:
  - a. **If the case was referred to you**, select Main > Messages,



or click the *Fast Links* **Messages** button.



The **Message Text** requests that you please review the specified case. **Click the link** in the message text to view the case.

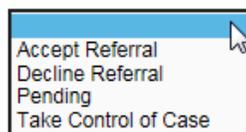
- b. **If you need to take control of a case**, use **Start/Edit New Case** to search for the case, clicking on the **Decedent's Name** from the search results to access the case.

### Complete the ME Review Action:

2. After accessing the case and reviewing case information, click **ME Review Case** under *Other Links* in the *Death Registration Menu*.
3. On the **ME Review Case** page, select your **Action**:

**Accept Referral** transfers case ownership to your office.

**Decline Referral** returns the referral to the requester (original case owner).



**Pending** notifies the requester you are considering if you should accept or decline the case.

**Take Control of Case** changes case ownership from the original owner to your office.

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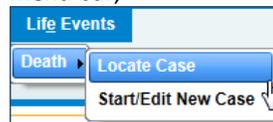
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4. If you accepted a case referral or take control of a case, enter your ME/Coroner **Case Number**, assigned by your office. The **Message** field populates with a system-generated message. Click in the **Message** field to add your own comments to the existing message.
5. Click **Save**. Then click **Return**. The message is sent to the requester.

After you **Accept** the referral or **Take Control** of the case, your ME/Coroner office now owns the case. Going forward, you can access the case using **Locate Case**.

## Locate Case to Find a Case You Own

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



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



2. Enter some of the decedent information. (For example, just the **Last** name or the **Case Id.**)
3. Click **Search**. (If you are not certain of the spelling of the decedent's name, you can click the **Soundex** button to increase search results to include names having similar letters or sounds.)
4. Click on the **Decedent's Name** to open the existing case.

## View Your *Registration Work Queue Summary*

You can monitor your workload on the cases you own through your work queue.

1. Select **Queues > Registration Work Queue Summary**, or click on the *Fast Links* **Registration Work Queue Summary** button.
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.

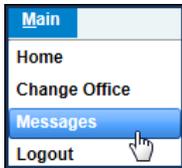
## Accept or Decline a Non-Affiliated Certification Request via *Review Non-Affiliated Certification Request*

A non-medically licensed Coroner might request you to certify a death certificate as a Non-Affiliated Certifier. With **Non-Affiliated Request Review**, ownership of the case is not transferred, but shared between the two offices.

**NOTE: Only accept non-affiliated requests from non-medically licensed coroners.** Any other medical facility should be referring cases to you, not sharing ownership.

The Coroner uses the **Request Non-Affiliated Certification** feature to add you to the case as certifier. You receive a **Message** requesting your certification.

1. Select **Main > Messages**,



or click the *Fast Links* **Messages** button.



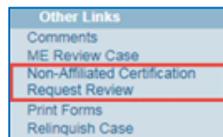
2. Click the link in the message text to view the case.

[Non-Affiliated Medical Certifier: Please review and complete medical certification fo](#)

The case information is 'read-only.'

### Accept or Decline the Request for Non-Affiliated Certification:

3. Click **Non-Affiliated Certification Request Review** under *Other Links* in the *Death Registration Menu*.
4. On the **Non-Affiliated Certification Request Review** page, select your **Referral Action**. **Accept Request** adds you to the case as the Medical Certifier. **Decline Request** returns the request to the case owner without adding you to the case.
5. An automatic message populates the **Message** field. You may click in the **Message** field and add your own comments/explanation to the existing message.
6. Click **Save** to send a message to the requester of your acceptance.
7. Click any *Medical Certification* page in the *Death Registration Menu* to begin editing the case. You are now the medical certifier on the case. The case now has two certifiers; the non-medically licensed Coroner and you as the medical certifier.



### 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 you start a case, it cannot be deleted. If you later find a duplicate case, contact the EDRS Call Center to request the duplicate case be ‘Abandoned’.

**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.

**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.

**Drop to Paper** is only to be used if the next person needing to work on the case is not set up in EDRS. Drop to Paper stops all further electronic processing of the case for all users. If you are just trying to print out your draft copy of the death certificate, choose **Print Working Copy**.

You cannot make changes to a case if you have already certified the case. You must **Uncertify** the case first, then make the changes, then **Certify** the case again.

If you need to **make changes on a case** that is **already Registered**, changes must be submitted using the established paper process for corrections.

If you transfer ownership of the case to a different office/facility, use the **Relinquish Case** feature under *Other Links* on the *Death Registration Menu*. The new case owner searches and takes ownership of the case using **Start/Edit New Case**. Be sure to provide them with the required case information, exactly as you entered it.

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## Enter Death Certificate Information

Any **Manner of Death** other than 'natural' must be certified by a Medical Examiner or Coroner. As you complete each page, click **Validate Page** to confirm that your data passes system validation rules.

EDRS uses the *Place of Death* locality (city, town, village) to assign the case to a local registration office. Please keep that in mind when entering *Place of Death* city, town, or village to help ensure the case gets assigned to the correct registration office.

Select the locality, if not defaulted from a facility address, using the **Places Look-up** tool  to avoid issues.

- At the top of the *Decedent* page, select the appropriate value to indicate if the Medical Examiner/Coroner is responsible for providing the *Decedent's Personal Information*.

**Decedent**

Will Medical Examiner be responsible for Personal information?

- If a funeral director is making funeral arrangements, select **No**, and only the *Decedent* page is visible to you in the *Personal Information* section of the *Death Registration Menu*.
- If a funeral firm is not involved at this time, then select **Yes**, and you must complete all *Personal Information* pages in addition to the *Medical Certification* pages.

Note: If **Disposition** is on hold pending autopsy or investigation, select **Hold** as the **Method of Disposition**. The disposition information should be updated as a correction/amendment after registration.

### Medical Examiner/Medically Licensed Coroner:

- The **Medical Examiner** or **Medically Licensed Coroner** completes all *Medical Certification* pages. Verify the information is correct and complete. Some information might have been system filled based on a setting in the EDRS case history. If you need to correct the information, click the **pencil eraser icon** to clear the fields; then use the **Look-up** tool  to select the correct information.
- When all pages of the case have been completed and validated, the **Certify** link appears to *Medically Certify* the case.

**Death Registration Menu**

- Personal Information
  - Decedent
- Medical Certification
  - Pronouncement
  - Place of Death
  - Cause of Death
  - Other Factors
  - Certifier
  - Certify
- Other Links
  - Comments
  - ME Review Case
  - Print Forms
  - Relinquish Case

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### Non-Medically Licensed Coroner:

- The **Non-Medically Licensed Coroner** completes the medical pages and the top portion of the *Certifier* page. On the *Certifier* page, he or she clicks the **Coroner is not a Physician** checkbox

Coroner is not a physician

and then requests **Non-Affiliated Medical Certifier**. (See **Request Non-Affiliated Certification**, covered elsewhere in this document.)

**Other Links**

- Comments
- ME Review Case
- Print Forms
- Relinquish Case
- Request Non Affiliated Certification

- The **Coroner's physician** (Non-Affiliated Medical Certifier) completes all the remaining information on the *Medical Certification* pages and the lower portion of the *Certifier* page then validates again. After the case has a status of **Medical Valid** or **Medical Valid with Exceptions**, the *Certify* page displays in the *Death Registration Menu*, where the Coroner's Physician affirms and certifies the case.
- The **Non-Medically Licensed Coroner Certifier Certifies** the case by reading the **Affirmation** statement on the *Coroner Certify* page, clicking on the affirmation checkbox, and clicking **Certify**.

### 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*. The validation symbol must be either **green** or **yellow** to certify the certificate.

**✗ Red X:** This page is incomplete; information is still needed.

**● 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.

## Certify a Case

After all pages in a section have been completed and validated, with no unaddressed errors (all pages are marked with either a green check or a yellow dot), then the *Certify* and *Coroner Certify* links appear, as applicable, in the left navigation bar, according to your credentials.

1. Click the **Certify**, or **Coroner Certify** link, as applicable to your role, in the *Death Registration Menu*.
2. Read the affirmation statement presented on the page. Click in the affirmation checkbox.
3. Click the **Affirm** button. Affirming places your electronic signature in the corresponding signature block on the *Death Certificate*.

**Note:** Cases owned by a non-medically licensed Coroner must have two certifiers, the Coroner and licensed Medical Certifier, requiring dual signatures on the *Death Certificate*.

## Print Forms

### ➤ Print Working Copy of Certificate:

[Print Working Copy Of Certificate - For Draft Review](#)

Used to review a draft copy of the *Death Certificate*. The Working Copy contains a side-margin 'watermark' noting that it is not the official death certificate unless it has been signed by the Registrar of Vital Statistics. Set your printer properties to *Fit to Page/Shrink to Fit*, so that the entire form prints out on letter-sized paper.

### ➤ Drop to Paper:

[Drop to Paper - Stops Electronic Registration For All Users](#)

*Stops all electronic processing of this case for all users*, converting the case to paper print-out. For Drop to Paper to be available to the medical owner, the case must have just one owner (no Funeral Home) and be Certified. The Drop to Paper print-out becomes the official death certificate. This feature should only be used when the next person who needs to work on the case is not able to work in EDRS. Set your printer properties to *Fit to Page/Shrink to Fit*, so that the entire form prints out on letter-sized paper.

An ME/Coroner may sometimes use Drop to Paper when a case does not yet have a funeral firm involved while investigation is pending, such as is the decedent's identity is not known or the decedent's next of kin have not been located.

## Make Corrections Before the Case Is Registered

Corrections can be made before a case is registered *and* if the case has not been dropped to paper.

If the case is already medically certified, the **Medical Certifier** of the case must **Uncertify** before changes can be made.

1. Open the case for editing.
  - a. If you are the case owner, you may use **Locate Case** to search for and open the case.
  - b. A Non-Affiliated Medical Certifier can only access the case through the original request **Message Text** or use **Start/Edit New Case**.
2. Click the **Certify** page link in the *Death Registration Menu*.
3. Click **Uncertify**.
4. Click **OK** in the confirmation message pop-up box.
5. Make necessary changes and click **Validate Page**.
6. Return to the *Certify* page, read the **Affirmation** statement, and click in the affirmation checkbox.
7. Click **Affirm**.