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. 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.
- Case ownership in EDRS is by office/facility. All EDRS users in that office can access and edit the case.

Four Ways to Receive a Case

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

- **Start/Edit New Case > start new case** to create a new case.
- **ME Review Case > Accept/Decline** a referral when a medical facility has created the case and then transferred case ownership to you using Refer to Medical Examiner. You will receive a link to the case in your Messages. (See instructions on page 2.)
- **ME Review Case > Take control of case** to transfer case ownership to your ME/Coroner office if a medical facility owns a case that should be owned by the ME/Coroner. To search for and access the case initially use Start/Edit New Case. (See instructions on page 2.)
- **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 adds you to the case as an external Medical Certifier by using Request Non-Affiliated Certification. You will receive a link to the case in your Messages. (See instructions on page 3.)

Start/Edit New Case to Create a New Case (or Find an Existing 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**.
   (These required fields are 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 name to open the existing case. The decedent’s name links directly into the case.
   b. If you do not find the case in 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**
   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 for continuing your work. You may also access the case from your Work Queue until the case is Certified.
ME Review Case > Accept/Decline a Case Received via Refer to Medical Examiner

If a case was already created by a medical facility and then transferred to you electronically using the Refer to Medical Examiner function, you will receive a message linking you to the referred case. Use ME Review Case to Accept or Decline the referral.

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

Access the Referred Case:
1. On the EDRS home page, click the Fast Links Messages button, or in the top menu bar select Main > Messages.
2. The message text requests that you please review the specified case. Click the link at the end of the message text to view the case. You will be able to view information in the case, but cannot yet edit the case.

Accept or Decline Ownership of the Referred Case:
3. To respond to the referral (accept or decline the referral), click ME Review Case under Other Links in the Death Registration Menu. If you accept the referral, case ownership will transfer to your office.
4. 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 sends a response to the requester while you continue considering if you should accept or decline the case. The fourth option, Take Control of Case does not need to be used if a case was referred to you electronically. If a case was not referred to you electronically, then Take Control of Case allows you to take ownership away from the original owner of the case. This option is discussed more elsewhere in this document.
5. Enter your ME/Coroner Case Number, assigned by your office. An automatic message will be entered in the Message field. You may click in the Message field and add your own comments to the existing message.
6. Click Save. Then click Return. The message will be sent to the requester.

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After you Accept the referral, your ME/Coroner office now owns the case. You can now access the case using Locate Case. The case link will also remain in your Messages, as well as from your Work Queue until the case is Certified.

ME Review Case > Take Control of Case Not Already Referred or Transferred to You

If an unnatural death case was created by a medical facility and has not been referred/transferred to a Medical Examiner/Coroner, you can search for the case and take ownership of it on your own.

1. Search for the case using Start/Edit New Case, as follows: 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. (These required fields are outlined in red on the page.)
3. Click Search.
4. In the Search Results, click on the decedent's name to open the existing case. Review the case information to verify that you have located the desired case and that you still feel that this case should be transferred to you.
5. After verifying this is the correct case, click ME Review Case.
6. On the ME Review Case page, in the Action field select Take Control of Case.
7. An automatic message will be entered in the Message field. You may click in the Message field and add your own explanation to the existing message.
8. Click Save. Then click Return. The message will be sent to the original case owner, and case ownership has now been transferred to you.

You can now access the case using Locate Case, because the ME/Coroner office now owns the case. You may also access the case from your Work Queue until the case is Certified.
Non-Affiliated Certification Request Review > Accept/Decline

A Certification Request from a Non-Medically Licensed Coroner

A Medical Examiner or medically licensed Coroner may receive a request from a non-medically licensed Coroner to certify a death certificate as a Non-Affiliated Certifier. With Non-Affiliated Request Review, ownership of the case is not transferred.

The Coroner will use the Request Non-Affiliated Certification feature to add you to the case as Certifier. You will receive a Message requesting your Certification. You will use the Non-Affiliated Certification Request Review feature to Accept or Decline the request.

1. On the EDRS home page, click the Fast Links Messages button, or in the top menu bar select Main > Messages.

2. The message text requests that you participate on the specified case as Non-Affiliated Certifier. Click the link in the message text to view the case. You will be able to view information in the case, but cannot yet edit the case.

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 will be entered in the Message field. You may click in the Message field and add your own comments/explanation to the existing message.

6. Click Save; then click any case page link in the Death Registration Menu, such as the Decedent page. (Clicking Return will return you to Messages screen.) Upon Save, your message with selected action will be sent to the case owner.

When you Accept the request you become the Medical Certifier on the case and can now access the case from: Work Queue > Medical Pending or Certification Required (depending on where it is in the work flow), or Messages, or Start/Edit New Case. Note that the case will have two certifiers: the Coroner and the Medical Certifier.

Locate Case to Continue Work on a Case You Already Own

Use Locate Case to find a case your office already owns in EDRS.

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, you may enter just the last name, or just the Case Id number.)

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 other names having similar letters or sounds.)

4. Click on the decedent’s name to open the existing case. The decedent name links directly into the case.

View Your Work Queue Summary

You can monitor your workload on the cases you own through your Work Queue.

1. In the home page Fast Links click Registration Work Queue Summary, or in the top menu bar select Queues > Registration Work Queue Summary.

2. On the Summary page, click on the Queue Name (work flow Category) for cases you would like to see.

3. Click on the Decedent Name to link directly into the 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. 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 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 to Complete the Case

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

- At the top of the Decedent page you will see a question to indicate if the Medical Examiner/Coroner will be responsible for providing the Decedent’s Personal Information.

  o If a funeral director will be making funeral arrangements, then the answer will be No, and only the Decedent page will be visible to you in the Personal Information section of the Death Registration Menu. You will proceed to complete the Medical Information pages.

  o If a funeral firm is not involved at this time, then the answer should be Yes, and you will complete all Personal Information pages in addition to the Medical Information pages.

  o If Disposition is on hold pending autopsy or investigation, then you will indicate Hold as the Method of Disposition, and proceed with case certification and registration. The disposition information will be submitted at a later time as a correction/ amendment.

Medical Examiner/Medically Licensed Coroner:

- The Medical Examiner or Medically Licensed Coroner will complete all Medical Certification pages. On the Place of Death page and Certifier page, be sure to verify the information is correct. Some information might have been automatically filled in by the system 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 Lookup tool to select the correct information.

- 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.

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- When all pages of the case have been completed and validated, the Certify link will appear for you to Medically Certify the case.

Non-Medically Licensed Coroner:

- The Unlicensed Coroner (who is not a medically licensed physician) will complete the Pronouncement and Place of Death pages, as well as the top portion of the Certifier page. The unlicensed Coroner will refer the case to a Coroner’s physician – a Non-Affiliated Medical Certifier – to complete the remaining medical information and to medically certify the case. (See Request Non Affiliated Certification, covered elsewhere in this document.)

- The Coroner’s physician (Non-Affiliated Medical Certifier) will complete all missing (and tentative) information on the Medical Certification pages. The Coroner’s Physician will complete the lower portion of the Certifier page, and will then Medically Certify the case.

- 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.

- After the case has a status of Medical Valid or Medical Valid with Exceptions, and the case has been Medically Certified, then the unlicensed Coroner will Coroner Certify the case by reading the Affirmation statement on the Coroner Certify page, clicking on the affirmation checkbox, and clicking Certify.

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, or Coroner Certify link for that section will appear on the left navigation bar, according to your credentials.

1. Click the Certify, or Coroner Certify link 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 will place your name in the corresponding signature block on the death certificate, and indicate that it is an electronic signature.

Note: Cases owned by a non-medically licensed Coroner have two certifiers: Coroner and Medical Certifier.
Request Non-Affiliated Certification – For Coroners Who Are Not Medically Licensed

Non-medically licensed Coroners have a link to **Request Non-Affiliated Certification** from a Medical Certifier who is not directly affiliated with their ME/Coroner office.

1. From any page in the case, under the Other Links section of the Death Registration Menu, click Request Non-Affiliated Certification.

2. In the Certifier Name lookup field, use the Lookup Tool to search for and select the desired Medical Certifier. For best results, enter part of their name followed by the % wildcard character, and click Search (or press Enter).

3. In the Facility/Office Name lookup field, use the Lookup Tool to select the Certifier’s office where they should receive this request. For best results, simply enter the % wildcard character in the Facility Name field, and click Search (or press Enter). All offices where this Certifier is affiliated will be listed in the search results. Select the appropriate office. The Medical Certifier will only be able to access this case when signed into EDRS under the office you select.

4. The Certifier’s name and office that you selected will be listed below the Lookup section.

5. A system-generated message will automatically be entered in the Message field. It is recommended that you add information to that message, being careful to avoid including any confidential information.

6. Click Save, and then click Return. The request with your message will be sent to the Medical Certifier as an email and to their EDRS Messages. The message in EDRS Messages will include a link directly into the case.

The Medical Certifier will examine the case, and then use Non-Affiliated Certification Request Review to Accept or Decline your request. You will receive a message back indicating if they have Accepted or Declined the request.

You may Request Non-Affiliated Certification before or after you Coroner Certify the case, but you cannot Coroner Certify while the case status is Medical Invalid.

If you discover that the requested medical certifier is not available or not the correct person, and they have not yet accepted or declined your request, you can withdraw your request by clicking Remove Non-Affiliated Request. Then you may Request Non-Affiliated Certification from a different medical certifier.

**Things to Remember**

If you are affiliated with more than one facility, when signing into EDRS make sure you select the appropriate office for your role on the case or you will not be able to fully access the intended case(s). 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 that the duplicate case be ‘Abandoned’.

Avoid typing text in fields that have the Lookup Tool (magnifying glass). Search using the Lookup Tool. When searching using Lookup or the Places icon, add the % wildcard character before and/or after your search text to find more possible results.

You can override some data validation messages if the information is currently unknown or accurate as is. To override a validation message, click in the Override box to the right of the validation message, 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. The overridden validation message will remain on the page, and the associated field will remain highlighted in yellow.

If you change data on a page after saving an override, you may need to:

1) uncheck the overrides,
2) save overrides with them unchecked (to clear the override from the database),
3) validate the page again, and then
4) re-select any remaining errors that need override, re-save the overrides, and then re-validate the page.

Do not use Drop to Paper unless the next person who needs to work on the case is not set up in EDRS. Drop to Paper locks out all users and stops electronic registration.

If you need to make changes to a case that is not yet Registered, then the Medical Certifier of the case can Uncertify the case (on the Certify page), and make the changes, Validate, then Certify 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 need to release ownership of the case to transfer it to a different office/facility, use the Relinquish Case feature under Other Links on the Death Registration Menu. The new case owner will search and take ownership of the case using Start/Edit New Case. Be sure to provide them with case information for them to find the case by the required Start/Edit New Case fields.
Print Forms

- **Print Working Copy of Certificate**: Should be 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.

- **Drop to Paper**: Stops all electronic processing of this Death Certificate for all users, converting the case to paper print-out. The Drop to Paper print-out becomes the official death certificate. A case that has been Dropped to Paper can no longer be accessed electronically; all users will be locked out of the case. This feature should only be used when the next person who needs to work on the case is not able to work in EDRS. For Drop to Paper to be available, the case must have just one owner be either certified or signed by that owner. 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.

Making 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, then 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 will need to access the case in their Messages or use Start/Edit New Case to search for and open the 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.