EDRS Quick Reference
Medical Examiners/Coroners and Staff

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 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 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/Coronors 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.”

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,
      ![Messages](Image)
      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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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 form.
   - 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.
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.

1. 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? [No]

a. 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.

b. 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:

1. The Medical Examiner or Medically Licensed Coroner completes all Medical Certification pages. 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.

2. When all pages of the case have been completed and validated, the Certify link appears to Medically Certify the case.

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Non-Medically Licensed Coroner:

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

2. 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 Certifier page displays in the Death Registration Menu, where the Coroner’s Physician affirms and certifies the case.

3. The Non-Medically Licensed Coroner Coroner 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.

EDRS ME QRG_Updated Aug 2019 4 EDRS Website: www.health.ny.gov/vital_records/edrs
For assistance, contact the EDRS Call Center at 1-844-866-EDRS (3377) or email edrs@health.ny.gov
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.

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.

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.