## 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** from your *My Applications* list.
   Note: If EDRS is not listed in *My Applications*, see ***Add EDRS to HCS My Applications***, later in this document.
4. On the *Select your Office* page, click on name of the office associated with the case you are entering. 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.

Note: If a new EDRS role assignment or office 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 assignment from HCS.

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

1. Select **Life Events** > **Death** > **Start/Edit New Case** in the menu bar,
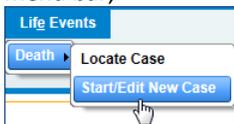
   or click the *Fast Links* **Death Start/Edit New Case** button.

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. On the search results page:
   a. If you find the case 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 search results, *and you are **certain** the case was not already created in EDRS*, then click the **Start New Case** button.
      The full text of the Start New Case button is

      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 office you are signed into, you and your colleagues/staff in the same office 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.

Access a Case You Already Own – Locate Case

Use **Locate Case** to find cases your office/facility already owns in EDRS.

1. Select **Life Events** > **Death** > **Locate Case** in the 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.

Enter Death Certificate Information

1. Complete *and Validate* each page in the *Medical Certification* section of the Death Registration Menu.
2. After all information is entered and has passed Validation, click the *Certify* link now appearing on the *Death Registration Menu*.
3. Read the **Affirmation** statement and then click in the checkbox.
4. Click **Affirm**.

Notes:

- If **Manner of Death** is not '*Natural'* the case must be owned by a Coroner or Medical Examiner.
- If the case was created at your office, but now needs to be transferred to a Coroner or Medical Examiner, click **Refer to Medical Examiner** under *Other Links* in the *Death Registration Menu* to transfer ownership of the case to the ME/Coroner's office.
- If an unnatural or unattended death case is owned by a Coroner who is not medically licensed, the Coroner must request medical certification from a medical certifier not affiliated with the Coroner's office. (See ***Receive a Non-Affiliated Certification Request from Another Office***, later in this document.)

View Your *Work Queue Summary*

You can only monitor your workload of the cases you own through your queue.

1. Click the Registration Work Queue Summary button <u>or</u> select *Queues > Registration Work Queue Summary* from the menu bar.
2. From this 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. Alternately, you can check the box to the left of the desired case and select an action below the list, such as *Add Comments*.

Print Forms

➢ **Print Working Copy of Certificate**: Should be used to review or print out a draft copy of the Death Certificate for review and communication with the Funeral Director. 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**: *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 are 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 and be either Certified or Signed. Set your printer properties to *Fit to Page/Shrink to Fit*, so that the entire form prints out on letter-sized paper.

Change Case Ownership to a Different Facility – *Relinquish Case*

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

Medical professional 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**.

Medical professional/facility 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 asks you to confirm that you want to take ownership of the case. Click **OK**.
5. On both the *Place of Death* page and the *Certifier* page, verify that all names and addresses are correct. If changes are needed, use the eraser icon to remove the current information, and use the lookup tool to select the correct facility and certifier. Addresses for both fill in automatically when you select them from the lookup tool.

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.

It is very important to fully complete the *Cause of Death* section of the death certificate.

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.

Once you start a case, it cannot be deleted. If the case was already created, even if it was created at the incorrect facility, it is better to transfer the case to the correct facility rather than creating a duplicate 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.

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**.

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.

Receive a Non-Affiliated Certification Request from Another Office

A medical certifier could receive a request to certify a case that is owned by a non-medically licensed Coroner or by another medical facility. The case owner uses **Request Non-Affiliated Certification** to request your participation on the case.

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**.
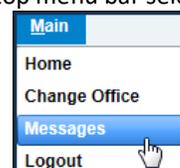
2. The message text requests that you participate on the specified case as Non-Affiliated Certifier. **Click the link in the message text** to view the case. The case information is 'read-only.'

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.
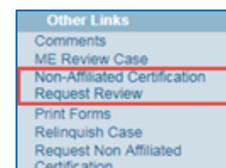
After **Accepting** the request, you are now the medical certifier on the case and can access the case the following ways:

- **Work Queue > Medical Pending** or **Certification Required**, depending on where it is in the work flow
- **Messages**
- **Start/Edit New Case**

Note that if the case owner is a non-medically licensed Coroner, then the case has two certifiers; the Coroner and the medical certifier.

Make Corrections <u>Before</u> the Case Is Registered

Corrections can be made before a case is registered *and* if you have **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. Access the case in EDRS.
2. Go to the *Certify* page and click **Uncertify**.
3. Click **OK** in the confirmation message pop-up box.
4. Make necessary changes and click **Validate Page**.
5. Go to the *Certify* page, then read the **Affirmation** statement and click on the checkbox.
6. Click **Affirm**.

Note: Corrections needed <u>after</u> the certificate is registered are to be submitted on paper to the Local Registrar.

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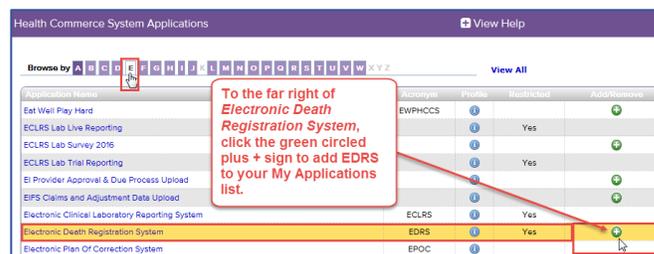
Return to the HCS Home page. EDRS is now be listed in *My Applications*.