

# Web-Based Electronic Death Registration (EDR)

TX EDR THIN CLIENT Trainers Guide  
DEMOGRAPHIC SECTION

Prepared for:

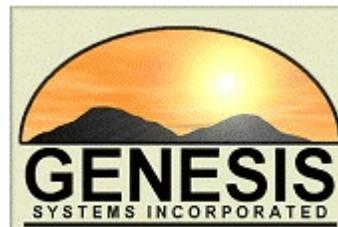
## Texas Department of Health



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Prepared by:



The **Industry Standard** in Vital Records Integrated Systems

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## About the TX EDR Demographic User Training Guide

This guide is intended to provide step-by-step exercises that will allow the user to explore functions and features related to completion of the Funeral Home section of the death certificate. Individual tasks will help users gain experience in completing a death record in the system. The process will also allow the user to understand general concepts associated with the application. Working through these exercises will ensure that all features of the application are understood so as to provide an efficient process in day-to-day business operations.

The exercises contained in this guide will in many cases provide specific answers to questions concerning the features of the system. These exercises should be executed when the user is accessing a 'test' or 'training' site rather than the 'production' site. Fictitious records should be used for the exercises in this guide.

The guide covers the following specific tasks:

- Login
- Access 'Demographic Data Entry' process
- Starting a NEW record
- Search and Work Queue
- Special Data Item Definitions
- Designation of the Medical Certifier
- Designation of the Local Registrar
- Demographic Verification of the record
- Drop-to-Paper

## Exercise 1 - Login

This exercise provides an overview of TER EDR application login process as well as introduces concepts related to functionality associated with 'user security profile' and the login 'location' rules.

To complete this exercise, you will need:

- A computer with Internet access meeting the minimum system requirements
- Valid User Name, Password and a Location (please obtain from your training instructor if you do not have one)
- NOTE: If instructed to use 'DEMO MODE' for these exercises, use the mouse to select the 'DEMO MODE' checkbox before logging in. Your user name and password may only be valid if the DEMO MODE box is checked.

1. Launch your Internet Explorer (version 5.0 or higher) or compatible internet browser by pointing your mouse and double-clicking on the Explorer icon  on your screen or by clicking once on the 'Start' button at the bottom left corner of your screen and clicking once on the Internet Explorer symbol 
2. Enter the following address : (TBA)
3. Wait for the application to load and for the login screen to appear



\*\*\*LOG-IN TO GENESISINFO THIN-CLIENT APPLICATION. \*\*\*

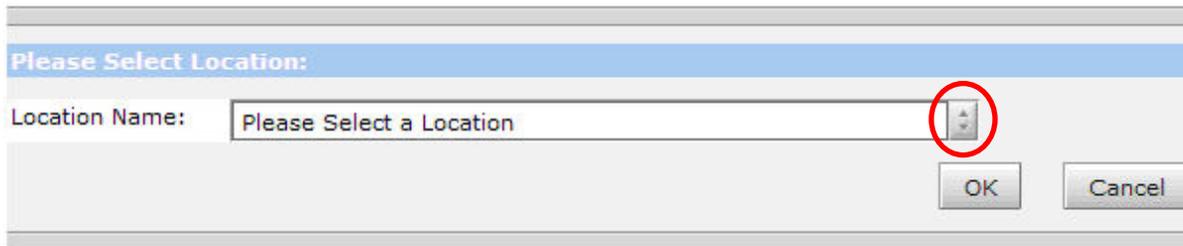
User Name:

Password:

Demo Mode  Guest Login

4. Use the mouse to point and click on 'User Name' field to set Focus - to get focus on the 'User Name' field after the Login screen appears, you must use the mouse to point into the user name field and click the left mouse button once. At present there is no keyboard method to cause focus to go to that item. Once focus is in the login screen you can use the keyboard or the mouse to navigate.
5. Type in the user name provided to you to login - this is not case sensitive
6. Press the 'TAB' key on the keyboard to advance focus to the 'Password' field.
7. Type the password provided to you to login.
8. Press the 'TAB' key on the keyboard to advance focus to the 'LOGIN' command button.

9. With focus on the LOGIN command button press the 'ENTER' key to execute the LOGIN command.
  - Optional approach: after entering the password you can also use the mouse to point to and left click on the LOGIN command button instead of using the 'TAB' and 'ENTER' keys.
10. Login Locations – If you are associated with more than one funeral home you will need to select the specific location that you wish to login to. This will determine what death records you will have access to in the session so it is important to carefully select the correct location for the work you are about to do. If you create NEW records while logged in under a given location, they will become associated with that funeral home location. You will only see the location screen if you have more than one location assigned to you.



11. Note that the 'field' on the screen has a set of arrows on the right side. This indicates that there is a 'drop-down' list associated with this item.
  - Press the 'TAB' key to set focus on the 'Location Name' field. This will open the list.
  - Use the arrow keys to highlight a desired location followed by the 'Enter' key to select it.
  - After selecting the location, use the 'TAB' key to set focus on the 'OK' command button and press 'Enter' to finalize the location choice and access the application.
12. Mouse – there are intuitive mouse alternatives for navigating the application and selecting items. Practice alternating the use of mouse and the keyboard approaches to determine the optimal method for you.

### ***Session Time Out:***

**During these exercises it may take much more time to complete operations that would be true in actual use of the application. If the system has not detected a 'business transaction' (save a record, search for a record, login) within 20 minutes, the session will 'time-out' and you will not receive further responses from the system. A warning will appear to alert you to this and ask you if you wish to continue the session. If you do not respond to this warning the session will end and the application will close. Saving the work you are doing frequently will prevent session time-outs. If you will not be using the application for a time you should close it and then login again when you need it.**



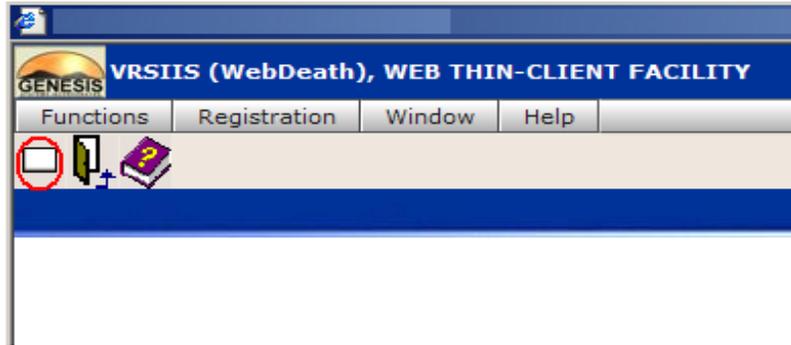
13. The main menu of the application appears. Exit the application by using the mouse to point to the 'Open Door' icon  that means 'EXIT' and then click once with the left mouse button

14. Repeat the exercise as needed and then continue to Exercise 2.

## Exercise 2 - Access Demographic Data Entry

This exercise describes two different ways to access the Demographic Data Entry section of the application. You will need to access this process before you begin any data entry.

1. Follow the steps for Exercise 1 to login and access the main menu.



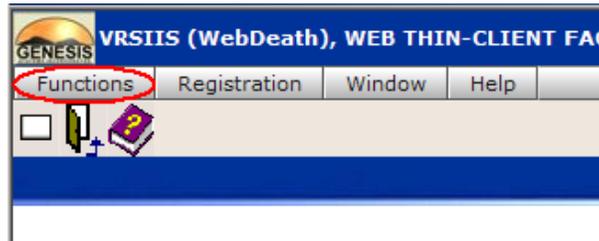
The main menu provides access to different sections of the application. You will only see the areas that are related to your processes. Some users may have multiple functions available.

2. Icon Approach - Click on the blank screen icon  to access the 'Demographic Data Entry' process.

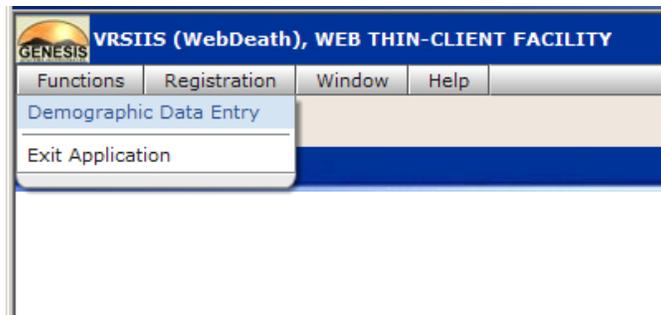
A screenshot of the Demographic Data Entry form in the VRSIIS (WebDeath) application. The form is divided into several sections: "Record Type" and "Date of Death Type" at the top left; "Decedent's Name" with fields for First Name, Middle Name, Last Name, Maiden, and Suffix, and a table for AKA (First, Middle, Last, Suffix) with Add, Edit, and Delete buttons; "Decedent's Birthplace" with fields for State/Foreign Country, Enter town's first character, and City Of Birth; "Decedent's Date Of Birth" with fields for Date of Birth, Age Units, and Age; and "Decedent's Sex" with fields for Sex, SSN, and SSN Verification Status. The form is currently blank, with all input fields highlighted in yellow.

The screen that appears as the demographic data entry process includes multiple 'tabs' of data that represent the entire death record. A user who accesses this screen as the 'Demographic Data Entry' process will only be able to data enter items on the tabs labeled 'Demographic'. The 'Medical' tabs can be viewed but not edited.

3. Exit to Main Menu - Exit the 'Demographic Data Entry' process to return to the MAIN MENU by using the mouse to point to the 'Open Door' Icon  and then click once with the left button.



4. Menu Bar Approach - Another means of accessing functions is by using the categories found on the menu bar. On the 'MAIN MENU' use the mouse to point to and then left click once on the word 'Functions' in the menu bar.



5. With the list of functions open, use the mouse to point to and then left click on the option for 'Demographic Data Entry'

GENESIS VRSIIS (WebDeath), WEB THIN-CLIENT FACILITY

Functions Registration Reports Utilities Window Help All Unresolved

Demographic 1 Demographic 2 Demographic 3 Demographic 4 Demographic 5 Medical 1 Medical 2 Medical 3

Record Type:

Date of Death Type:  Date of Death:

**Decedent's Name**

First Name:

Middle Name:

Last Name:  Suffix:

Maiden:

AKA	First	Middle	Last	Suffix

Add

Edit

Delete

**Decedent's Birthplace**

State/Foreign Country:

Enter town's first character:

City Of Birth:

**Decedent's Date Of Birth**

Date of Birth:

Age Units:

Age:

**Decedent's Sex**

Sex:

SSN:

SSN Verification Status:

6. Exit to Main Menu- using the mouse, point to the 'Open Door' Icon to exit to the main menu.
7. Exit the application – Using the mouse click on the 'Open Door' Icon on the main menu to close the application.

## Exercise 3 - Starting a NEW Record

This exercise describes how to initiate a record in the system and discusses the duplicate checking functionality associated with the process.

1. Execute the steps for exercises 1 and 2 to access the application and the 'Demographic Data Entry' Process.

The screenshot shows the VRSIS (WebDeath) WEB THIN-CLIENT FACILITY interface. The main window contains several tabs: Demographic 1, Demographic 2, Demographic 3, Demographic 4, Demographic 5, Medical 1, Medical 2, and Medical 3. The Demographic 1 tab is active, displaying a form for entering demographic data. The form is divided into several sections:

- Record Type:** A dropdown menu.
- Date of Death Type:** A dropdown menu.
- Date of Death:** A date input field.
- Decedent's Name:** Fields for First Name, Middle Name, Last Name, and Maiden. A Suffix dropdown is also present. Below these is a table for AKA (Also Known As) with columns for First, Middle, Last, and Suffix, and buttons for Add, Edit, and Delete.
- Decedent's Birthplace:** Fields for State/Foreign Country, Enter town's first character, and City Of Birth.
- Decedent's Date Of Birth:** Fields for Date of Birth, Age Units, and Age.
- Decedent's Sex:** Fields for Sex, SSN, and SSN Verification Status.

2. Use the mouse to point to and then left click on the 'Blank Page'  icon and wait for the 'NEW SCREEN' to appear.

The screenshot shows the Record Data dialog box, which is divided into two main sections: General and Decedent. The General section contains fields for Date Of Death, SSN, Record Type, Date Of Death Type, EDR Number, Medrec, and ME Case Number. The Decedent section contains fields for First Name, Middle Name, Last Name, Suffix, Date Of Birth, and Gender. Below the Decedent section is the Place Of Death section, which contains fields for Type of Place of Death and Place of Death. At the bottom right of the dialog box are buttons for Find Record and Cancel.

3. The field focus is automatically set to the left side of the 'Date of Death' field on the new screen as indicated by the change of color of that field. The colors scheme and its meaning is further discussed in Exercise 5 and is referred to as 'Visual Cueing' or 'Viz-e-Q'.
  - Note: the user can navigate and perform all functions on this screen with the keyboard.
  - Note: if using the mouse to position/reposition field focus, the cursor must be positioned at the extreme left side of the date of death field before you begin to enter a date. If the mouse was not pointed far enough left when focus was established, use the 'BACKSPACE' key to move the cursor as far as it will go to the left in that field.
4. Type the Date of Death for this record. Type only the numbers. You will see that the slashes are provided as you type.
5. Press the TAB key on the keyboard to advance the cursor
  - The date of death field is one of several fields that are critical to the system and that therefore require verification by double entry. After pressing TAB to advance from the date of death field on the NEW screen, the double entry verification screen for the date of death will appear.



6. When a verification screen appears, focus will land on the first field in the verification window.
7. Type the date of death in the field in the verification window. It must match what was originally entered on the NEW screen.
8. **Press the TAB key to advance the focus from the date of death field to the 'OK' button.**
9. **Press the 'ENTER' key to execute the 'OK' command after the 'OK' command button has focus.**
  - Note: after entering the date of death in the verify field you can use the mouse to point at and click on the 'OK' command instead of using the TAB key followed by the 'ENTER' key. If the 'ENTER' key is pressed before focus is placed on the 'OK' command button, the date will not be verified.
10. If the date entered matches the original date the verify window will disappear and focus will advance to the 'Social Security Number' field.
  - **Practice: the steps involved in responding to a verify window will be necessary throughout the application and the user should become familiar with the process. You may wish to repeat steps 3 through 9 using different values for the date of death for practice.**

**11.** For this exercise leave the 'Social Security Number' field blank and press TAB to advance to the next field. In live use of the application it will be important to enter the decedent's social security number on the NEW screen. However, since the social security numbers that are entered are verified by the Social Security Administration automatically, fictitious numbers or numbers not associated with actual death records must not be entered. The social security number is a field that requires double entry verification.

**12.** Keyboard Approach 'Date of Death Type' field

- The 'Date of Death Type' field is another 'Drop-Down' field as discussed in exercise 1 related to selecting the login location. In this exercise we will use the keyboard approach rather than the mouse approach for the drop-down field.
- The options for this field include: Actual, Presumed and Court Ordered. Begin to type the word 'Actual' until the drop-down list opens and the word 'Actual' is highlighted.
  - To open the list when you don't know what options might be there you can press the 'down arrow' key on your keyboard while focus is on the field but the list is not open
- With the word 'Actual' highlighted in the list, press the 'ENTER' key to select the highlighted choice.
  - Note: pressing 'ENTER' to select the highlighted choice is necessary before pressing the TAB key to move to the next field
- Press the 'TAB' key to advance focus to the 'EDR Number' field.

**13.** The 'EDR Number' is generated by the system.

- The EDR number is a mandatory item for each death record but it is assigned by the system when the record is first saved. This item is contained on the NEW screen for cases where you may have a REPORT of DEATH generated by a medical certifier who has already added the record to the system. Entering the EDR number contained on the REPORT of DEATH provides a sure way of getting the existing record. If the EDR number is not available, users will leave this blank.

**14.** Press the 'TAB' key to advance focus from the 'EDR Number' field. Leave the 'Medrec' (Medical Record Number) field blank and press 'TAB' to advance. The medical record number is important if there is one available. It is part of what the system uses to see if the record may already have been created by someone else (user at the place of death etc.).

**15.** Leave the 'ME Case Number' field blank and 'TAB' to advance

- This field will only apply to Justice of the Peace/ME cases but is also used to determine if the record may already exist and is therefore important if there is one and it is available.

**16.** Type information for the decedent's first name and then press 'TAB' to advance to the middle name. You will find that the decedent name fields require double entry for verification. Repeat to complete the middle and last names. 'TAB' from the last name field to set focus on the 'Suffix' field

**17.** With focus on the 'Suffix' field: type the letter 'j', press the 'ENTER' key and then press TAB.

- This is the keyboard approach to drop-down lists when you know the first few letters of the option you need. It will result in 'Jr' being selected as the suffix.

**18.** With focus on the 'Date of Birth' field, hold down the 'SHIFT' key and while it is held down press the 'TAB' key.

- Focus should return to the 'Suffix' field. This is referred to as 'Shift+TAB' and it moves focus back to the previous field.

**19.** With focus on the suffix field containing 'Jr', press the 'Esc' key to clear the contents of the field.

- Once a drop-down field has a value in it you can use backspace or delete to erase the letters in order to make another selection. To clear the field and leave it blank, it must be cleared with the 'Esc' key.

**20.** With focus on the cleared 'Suffix' field, press the 'Down Arrow' on the keyboard to open the list and then use the down arrow to navigate until 'Sr' is highlighted. When 'Sr' is highlighted press 'ENTER' to select it and then TAB to advance to the 'Date of Birth' field.

- Regardless of the method used to highlight an item in a drop-down list, it is necessary to either press 'ENTER' to select the item or to use the mouse and left click on the item before using 'TAB' to advance from the field. Otherwise the highlighted item will not be selected.

**21.** With focus on the 'Date of Birth' field, enter the date of birth of the decedent. Type only the numbers.

**22.** Press the 'TAB' key to advance from the date of birth field.

- The date of birth field is the final field that requires double entry. Verify the date of birth in the verify window (type the date, TAB to set focus on 'OK', press 'ENTER' to execute 'OK').

**23.** With focus on the 'Gender' field, type the letters 'ma', press 'ENTER' and then press TAB

- Highlights 'Male', selects 'Male', advances focus to 'Type of Place of Death'

**24.** With focus on 'Type of Place of Death', press the 'Down Arrow' on the keyboard to highlight the option for 'Hospital - Inpatient'.

**25.** Press 'ENTER' to select 'Hospital-Inpatient' as the type of place of death

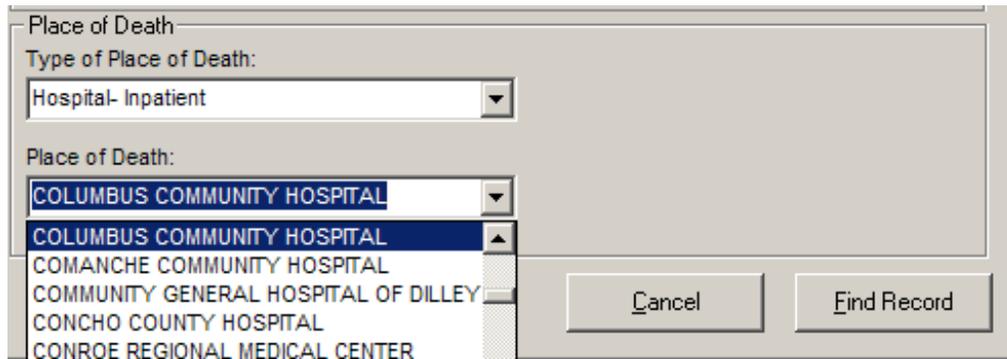
- Indicating the type of place of death will cause the 'place of death' drop-down list to contain only places that are of the indicated type.

**26.** Press TAB to advance to 'Place of Death'

- Since it has probably been more than 20 minutes since the beginning of the exercise, the session may have 'timed-out'. Refer to the note regarding [session time-outs](#) in exercise 1.

**27.** With the 'Type of Place of Death' set as 'Hospital-Inpatient' and focus on the 'Place of Death' SLOWLY type 'COLU'

- As you type each letter notice that the list is changing to highlight the first item in the list that matches what you have typed. When you reach 'COLU' there will be only one that matches 'COLUMBUS COMMUNITY HOSPITAL' but until you get to the 'U', the match will focus on other places higher in the list.



- This is an example of the 'Mind's Eye' drop-down functionality that allows you to simply type the response you are looking for and then select it (press 'ENTER') when it becomes highlighted. In most cases you will not need to type more than a few letters of the item you are looking for.

**28.** Press 'ENTER' to select the highlighted choice 'Columbus Community Hospital' and then press 'TAB' to advance to 'Find Record'.

**29.** Press 'ENTER' to execute the 'FIND RECORD' command'

- Although you are trying to create a NEW record, the system will always assume that the record may have already been created by a user at a different location. Death records may be created at the place of death and in some cases may have had the medical portion completed and medically certified. The information captured on the NEW screen has been carefully defined to optimize the likelihood of finding the matching record if one exists.
- The response from 'FIND RECORD' will vary according to the results. If a single matching record is found that is either not already 'owned' by a different funeral home or that is already owned by the location you are logged in under, the record will be retrieved to the demographic data entry screen for your access. If no matching record is found, a new record will be created. If multiple matching records are found or if a record is found that is already 'owned' by another funeral home, the system will provide that information so you can investigate further.
- We will assume that the result in the present exercise is that a NEW record will be created. Press 'TAB' to place focus on the 'OK' command button and then press 'ENTER' to execute the 'OK' command or use the MOUSE to point to the 'OK' command and click once with the left mouse button.



**30.** The first tab of the demographic data entry screen will appear. Use the Mouse to point to the 'Save Record' icon  and then click once with the left mouse button to save the NEW record before continuing to complete the data entry.

- Clicking 'Save Record' at this point rather than waiting until the entire record has been completed will accomplish three important things:
  - The information captured so far will be preserved and the record will be established in the database
  - The current session timer will be reset to prevent session time out messages
  - Assuming the decedent's social security number, name, date of birth and gender have been completed on the NEW screen, the SAVE action will initiate the process of verifying the decedent's SSN with the Social Security Administration. A response must be received from SSA regarding this verification before the record can be electronically filed with the state. Initiating the verification at this point will make it likely that the response will be back by the time the record is saved again or searched for. Once a verification attempt is initiated the system automatically looks for a response each time the record is saved or retrieved.

Exercise 4 will use the record created in exercise 3 to describe searching for a record and some data entry topics.

## Exercise 4 - Searching and Work Queue

This exercise will explore two different ways to access a given record: using either the 'Search Record' feature or the 'Work Queue' approach. If you know that a given record is already saved in the system, rather than using the 'NEW Record' process the record can be retrieved by a 'Search Record' process or in many cases by looking for it in the 'Work Queue'.

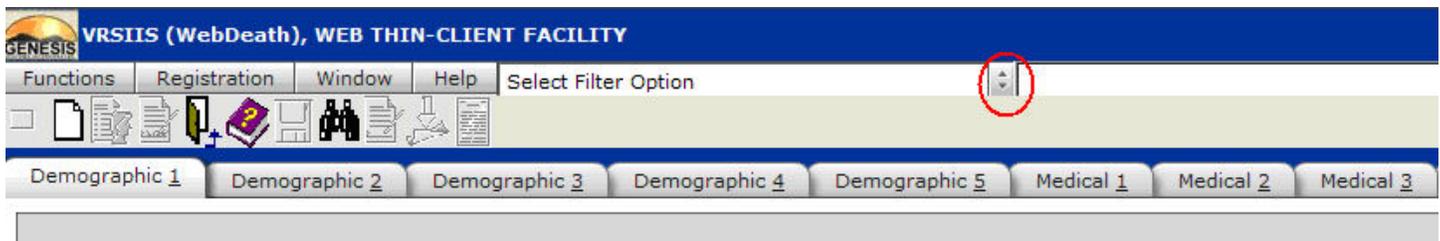
The 'Work Queue' is a drop-down list of death records that have been started but still need some action to complete them. Only records that are associated with a given funeral home will appear in the work queue for users who login under that funeral home.

'Search Record' feature allows a broader approach to retrieving records regardless of whether or not they may be in the work queue. Searching can be used to retrieve records that have already been completed and electronically filed. However, searching is also limited to records that are associated with the particular login location.

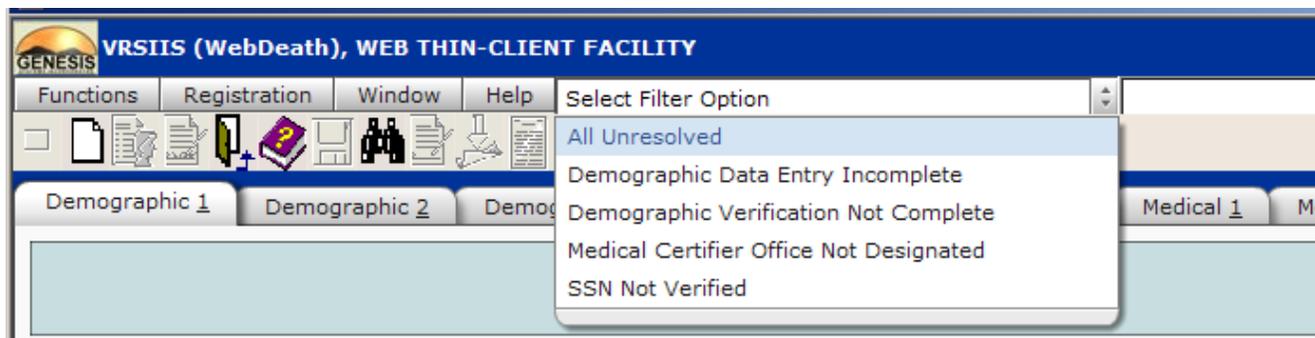
*To complete this exercise, you will need:*

- One or more records initiated and saved following steps in Exercise 3. You will need some of the entered data noted or memorized (First, Middle and Last names will do for the purposes of training)

1. Exit the application and login again (see exercise 1 if needed).
2. Access the 'Demographic Data Entry Process' (see exercise 2 if needed)
3. Using the mouse, point to the double arrow symbol at the right edge of the box ' Select Filter Option'



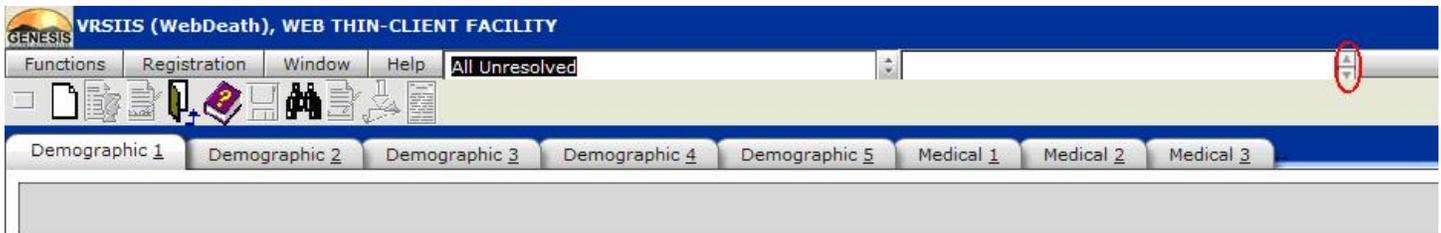
4. Use the left mouse button to click on the double arrow symbol to cause the list of choices to open



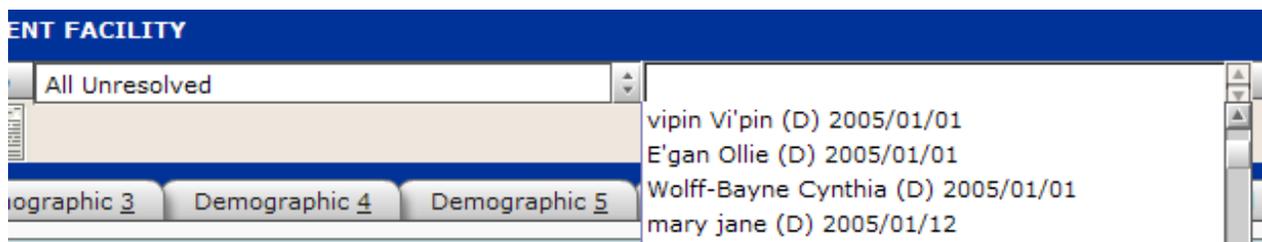
- The list of filter choices allows the user to populate the work queue with records that need specific types of action.
  - All Unresolved – all records that need any action
  - Demographic Data Entry Incomplete – records that have some missing data fields that need to be filled in
  - Demographic Verification Not Complete – Records that have been completed as far as data entry and now need to be reviewed and verified by the funeral director specified on the record (Demographic Verification Process – Exercise 7)
  - Medical Certifier Not Designated – records that do not contain an identified medical certifier (Designation Process – Exercise 6)
  - SSN Not Verified – No response has been received from the Social Security Administration regarding verification of the decedent’s social security number. Retrieving records of this type will cause the system to check for a response and to update the record accordingly.

5. Use the mouse to point at and then click on the ‘All Unresolved’ option in the filter list.

6. Use the mouse to point at the double arrow symbol at the right edge of the ‘Work Queue’ drop down list.



7. Click on the double arrow of the work queue to drop open the list of unresolved records that match the filter criteria you selected.



8. Use the mouse to point to and click on the record you wish to retrieve. Once the record is retrieved, you will be able to perform additional data entry and record processing.

**GENESIS VRSIIS (WebDeath), WEB THIN-CLIENT FACILITY**

Functions Registration Reports Utilities Window Help All Unresolved E'gan Ollie (D) 2005/01/01

Demographic 1 Demographic 2 Demographic 3 Demographic 4 Demographic 5 Medical 1 Medical 2 Medical 3

Record Type: Identified  
 Date of Death Type: [ ] Date of Death: 01/01/2005

**Decedent's Name**  
 First Name: Ollie  
 Middle Name: Faye  
 Last Name: E'gan Suffix: [ ]  
 Maiden: [ ]

AKA	First	Middle	Last	Suffix
[ ]				

Add Edit Delete

**Decedent's Birthplace**  
 State/Foreign Country: [ ]  
 Enter town's first character: [ ]  
 City Of Birth: [ ]

**Decedent's Date Of Birth**  
 Date of Birth: 12/12/1978  
 Age Units: [ ]  
 Age: [ ]

**Decedent's Sex**  
 Sex: Male  
 SSN: [ ]  
 SSN Verification Status: PASSED

9. Now use an alternative approach to retrieve this same record. Use the mouse to point to and click on the 'Search Record' icon: .

Search Record Screen

**General**  
 Date Of Death: [ ] / [ ] / [ ] EDR ' Number: [ ]  
 Med Rec Number: [ ] JP / ME Case Number: [ ]  
 County of Occurance: [ ]  
 Certifier Title: [ ]  
 Medical Certifier's First Name: [ ] Medical Certifier's Last Name: [ ]  
 Funeral Home: [ ]

**Place Of Death**  
 Type of Place of Death: [ ]  
 Place of Death: [ ]

**Decedent**  
 First Name: ollie Middle Name: [ ]  
 Last Name: e'gan Suffix: [ ]  
 Date Of Birth: [ ] / [ ] / [ ]  
 Gender: [ ] SSN: [ ]

**Decedent's Mother / Father**  
 Mother's First Name: [ ]  
 Mother's Maiden Last Name: [ ]  
 Father's First Name: [ ]  
 Father's Last Name: [ ]

Find Select Records Clear Exit **Number of Records Found: 0**

- Use the mouse to click in the 'Decedent's First Name' field then enter the first name and press 'TAB' twice to advance to the last name. Enter the last name and then click on the 'FIND' command at the lower left of the search screen.

DecedentsFirstName	DecedentsMiddleName	DecedentsLastName	DecedentsSuffix	CertifierFirstName
Ollie	Faye	E'gan		

- Use the mouse to click on the first name of the decedent that you want to retrieve from the list at the bottom of the screen. If no records are listed, make sure you have spelled the decedent's first and last names correctly in the fields at the top of the form.
  - It is not necessary to enter the entire name. You may enter only the first several characters of each item you use to search by to minimize spelling errors.
  - The best fields to use for the search are any of the key fields in combination with the year of death (EDR number, Social Security Number, Justice of the Peace/ME case number). These will filter down to a single record. Searching by names will take longer in the real-world use of the application.

- After highlighting the first name of the record you wish to select, click on 'Select Records'.

**Decedent's Name**

Record Type: Identified

Date of Death Type: [ ] Date of Death: 01/01/2005

First Name: Ollie

Middle Name: Faye

Last Name: E'gan Suffix: [ ]

Maiden: [ ]

AKA	First	Middle	Last	Suffix
[Empty Table]				

[Add] [Edit] [Delete]

**Decedent's Birthplace**

State/Foreign Country: [ ]

Enter town's first character: [ ]

City Of Birth: [ ]

**Decedent's Date Of Birth**

Date of Birth: 12/12/1978

Age Units: [ ]

Age: [ ]

**Decedent's Sex**

Sex: Male

SSN: [ ]

SSN Verification Status: PASSED

## Exercise 5 - Special Data Item Definitions

The objective of this exercise will be to complete data entry on a record so that it is available for the remaining exercises. Most of the data items that need to be completed will only require the 'TAB' key to advance to the field, typing the necessary information and then pressing the 'TAB' key to advance again. Drop-down list fields require the extra key-press of the 'ENTER' key to select an option from the list. Exercise 5 will address only certain fields or steps that involve some new functions. Instructions will include clicking on specific fields to place focus on fields that relate to the discussion. This would not be the typical way to navigate through a record but is used for the purposes of this exercise. The user would normally tab from field to field and respond in the order presented.

To complete this exercise, you will need:

- A record created during previous exercises (Exercises 1 through 3)
1. Execute the steps in Exercise 1 to login and access the main menu. Then access Demographic Data Entry screen following steps in Exercise 2.
  2. Start a NEW record by following steps outlined in Exercise 3, or utilize an existing record created while completing previous exercises.
  3. With the mouse, click on the 'Date of Birth' field and use the 'TAB' key to advance to the 'Age Units' field on the 'Demographic 1' tab.



4-5. Decedent's Date Of Birth

Date of Birth:	01/01/1930
Age Units:	Years
Age:	

Type 'Y', press 'ENTER' to select the highlighted choice of 'YEARS', and then press 'TAB' to advance to the AGE field. Note: pressing just the 'TAB' key after typing 'Y' without pressing 'ENTER' will have the same effect as step 4 below. Pressing the 'ENTER' key (or clicking on the item with the mouse) is necessary to actually select the highlighted option.

- The yellow background on a field is referred to as 'Visual Cueing' or 'Viz-e-Q'. Fields that have a yellow background are 'unresolved'. The system needs a response to these fields before the record is considered complete. Some fields can be left blank and still become resolved. Others cannot be resolved unless they have a valid entry.
  - When the background of all fields is white instead of yellow, data entry on the record is complete.
4. Leave the 'Age' field blank and press 'TAB'. The system will ask you to verify that you wish to resolve the item as blank.

Soft-Check Alert

You left 'Age:' blank.

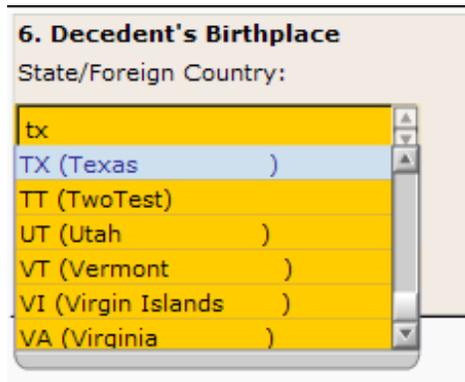
'BLANK' will mean 'NONE' for this item unless you intend to fill it in later.  
Do you need to complete this item later?

As with all 'VERIFY' windows, press 'TAB' to place focus on the 'NO' option and press 'ENTER' to execute the command. If you respond with 'NO', the system will resolve the field even though it is blank (indicating that you do not need to complete it later.). If you respond 'YES', the system will keep the field unresolved. This prevents the record from being electronically filed until that item is completed.

5. After clicking 'NO' to indicate that you wish to resolve the AGE field as blank, focus returns to the AGE field and you need to press 'TAB' key again to advance to the next field. Pressing 'TAB' this time will not cause the "verify" window to appear and focus will advance to the next field.
6. Use the MOUSE to point to and click on the button labeled 'Add' and enter a second name for the decedent of record.

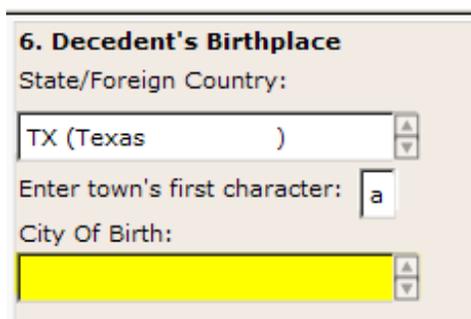
AKA	First	Middle	Last	Suffix

- If a decedent has AKA names, pressing this button provides fields to capture additional full names.
7. If you entered an AKA use the mouse to select the AKA name and click on the 'Delete' button before continuing.
  8. Use the MOUSE to point to and click to set focus on the 'ME Case Number' field at the top of the screen. Press TAB to advance through each of the fields down to and including the 'Age' field and provide responses as needed so all fields up to and including the 'Age' field are resolved.
  9. With focus on the 'State/Foreign County' of the decedent's birthplace, type the letters 'TX' followed by a space 'TX '.



This is the convention for finding a state using the state abbreviation. Type the two-character state abbreviation followed by a space. If you don't type the space the list will filter to choices that have the letters you type as the first two letters. This would not be a problem for 'TX' but could be for PA or SC or other state abbreviations that also form the beginning of other place names. Typing 'TEXAS' will also find 'TEXAS' and typing SOUTH C will find SOUTH CAROLINA but will require typing more letters before the desired match is found.

10. With the option for TX (Texas) highlighted in the list, press the 'ENTER' key to select the option and the 'TAB' key to advance to the field for 'Town's First Character'
  - Some geographic entries that include state and city also capture the county. When this is the case, the list of cities is filtered to include only cities within the state and county already selected. Some geographic questions require only the state and city. The absence of a county filter causes the list of cities to be very large and slows response time. For this reason when a county is not captured, the system asks for the first letter of the city or town name before it populates the list of cities/towns. This greatly reduces the number of options in the list and prevents slow performance.
11. With focus on the 'Town's First Character' field, type the letter 'A' and then press 'TAB' to advance to the 'City of Birth' field.



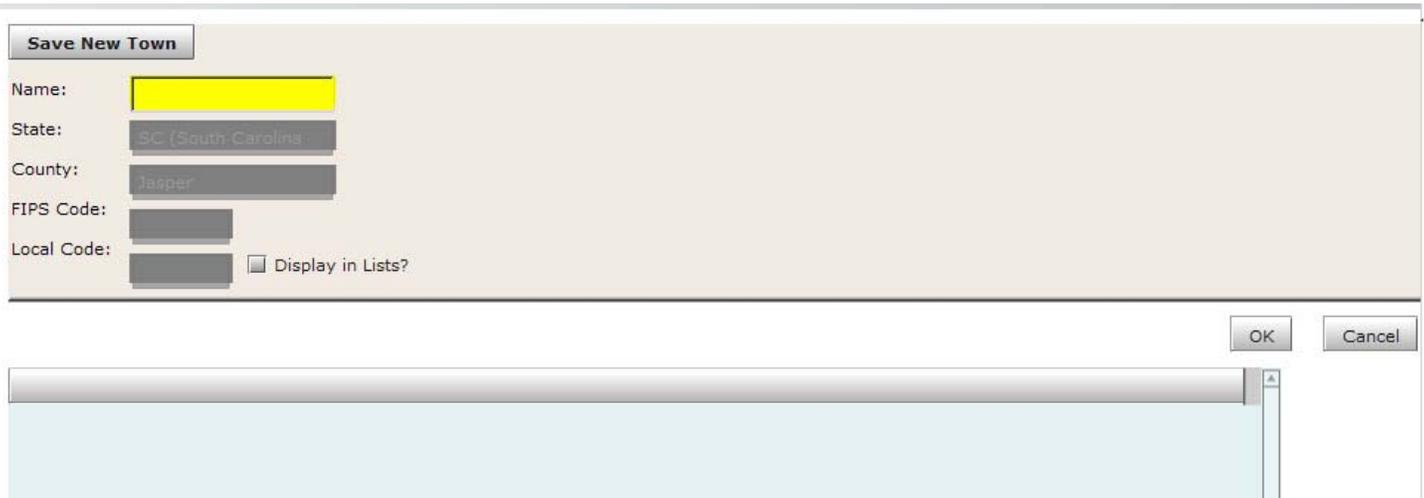
12. With focus on the city of birth field begin typing the name of any city in Texas that begins with the letter 'A'. When the desired option is highlighted press the 'ENTER' key to select that choice. **BEFORE PRESSING 'TAB'** to advance, read the next section.
  - The City of Birth field is the last field on the 'Demographic 1' tab and therefore the next field that needs a response is on the 'Demographic 2' tab. The system all automatically advance the user to the next tab when tabbing off the last physical field of a tab.

The remainder of this exercise will specifically address only a few fields across the remaining screens where certain features require explanation. It is important however that all of the data items on the record become 'resolved' to support the remaining exercises. This will be left to the user to accomplish by applying the skills covered thus far. Remember to 'SAVE' periodically to avoid session time outs that occur if more than 20 minutes elapse between searches or saves.

### 13. 'Demographic 2' tab – 'City of Residence' field

Complete the fields down to and including the county of residence. Advance to the city of residence field.

- What if the city I want is not in the list even though it is a valid town or city in the county that was entered?
  - This will be referred to as 'Add on the Fly'. It allows the user to add an item that is not in the list if it is needed to complete the item.
  - The very last option in lists that will allow 'Add on the Fly' will be a choice '(Add New ...)'.
    - To access this choice the mouse can be used to SCROLL down to the bottom of the list but there is a keyboard short-cut that is faster
    - The first character of this special entry is an open parenthesis '(' which is the character on top of the number 9 key (Shift+9)
    - Hold the Shift Key and press the number 9 to cause the '(Add New Town)' option to be highlighted. Then press 'ENTER' to select that option.



- First - look at the list at the bottom of the screen (if there is one) to see if the item you need may already be there. This would be the case if the item has already been added 'On the Fly' by someone else but has not yet been 'reviewed' and accepted by the state as a valid new addition to the list. If the option you need is in the list, click on it with the mouse and then click on 'OK'
- If the item is not in the extended list, click in the NAME field and type new entry you need. Then click on 'SAVE NEW TOWN'.

### 14. 'Demographic 4' tab – 'Additional Funeral Service Provider' field

- This field is associated with 'Trade Calls'. These are cases where the funeral home of record (the funeral home responsible for filing the death certificate) is not providing all of

the services for the family and the names of both funeral establishments need to appear on the printed death certificate.

- If 'Jones Funeral Home' is entered as the 'Additional Funeral Service Provider' and 'Johnson Funeral Homes Inc' is the funeral home that is responsible for filing the death certificate, the name of the funeral home on the death certificate will print as follows:  
Johnson Funeral Homes for Jones Funeral Home
- The license number of the funeral home that files the death certificate will print on the death certificate.

**15.** You may have noticed a grayed-out field on the 'Demographic 1' tab. These kinds of entries may or may not be modifiable based on a set of rules assigned to them.



These types of fields are referred to as 'Bypassed and Resolved' and normally the entries recorded within it cannot be modified for the following reasons:

- The field is automatically populated according to the only option available from that location profile or based on the processes available for your user security profile
- The data has been automatically assigned and cannot be modified, as is the case with the 'State File Number' field.
- Based on your previous entries, data has been filled in and disabled from modification, as with the address fields for the place of death items on the 'Demographic 3' tab (when a hospital is selected.)
- Based on your entries (or lack of thereof) the fields do not apply, as is the case with the 'Specify' boxes for decedent's race and origin fields on 'Demographic 5' tab.

You may explore how these fields 'activate' and 'disable' based on your entries for various checkboxes in race and origin fields.

#### **16.** 'Demographic 5' tab – 'Hispanic Origin' and 'Decedent Race' fields

- Hispanic Origin allows selecting one choice from the available options. Use the mouse to point at and then click to select the single desired choice.
  - To change the choice the selected choice must first be un-checked by clicking on it again and then a different choice can be selected.
- Race will support multiple choices. Click on as many choices as apply.
- These 'checkbox' fields can also be selected and de-selected by the keyboard
  - Use the 'TAB' key and the 'SHIFT+TAB' option to navigate to the desired choices and the space bar to select or de-select

**17.** Save by clicking on the 'Save Record' icon at the top of the screen .

## Exercise 6 - Designation of the Medical Certifier

Designation of the Medical Certifier can occur any time after the record has been first saved and when the identity of the medical certifier has been determined. Designation of the medical certifier will cause an e-mail message to be sent to the designated individual and will cause the death record to appear in a work queue for their attention. In some cases if the record had actually been created by the medical certifier, there may already be a designated medical certifier on the record. The designation can be changed up to the point that the record actually has been medically certified by the medical certifier.

The objective of this exercise is to complete a case of 'designation' of the Medical Certifier (Physician, Justice of the Peace, or a Medical Examiner) on the record and explore various scenarios associated with this process. A Funeral Director who has already verified (and released) the demographic part of the record could still change the designated medical certifier on the record if the case was "declined" by a Justice of the Peace or Medical Examiner.

*To complete this exercise, you will need:*

- A record created during previous exercises (Exercises 1 through 3)
1. Execute the steps in Exercise 1 to login and access the main menu. Then access Demographic Data Entry following steps in Exercise 2.
  2. Start a NEW record by following steps outlined in Exercise 3, or utilize an existing record created while completing previous exercises.
  3. The process of Designation can be initiated at any time after the record has been initially saved in the system. Using the mouse, point to the Designate icon 



4. The 'Medical Certifier Designation Search' screen will appear:

Medical Certifier Designation Search

**Medical Certifier Type**

Medical Certifier Type: [Dropdown Menu]

**Medical Certifier Information**

First Name: [Text Field] Middle Name: [Text Field] Last Name: [Text Field] License#: [Text Field]

Designate Search Cancel

5. Use the left mouse button to click on the double arrow symbol to cause the list of Medical Certifier Type choices to open.
6. Keyboard -
  - Begin to type the word 'Justice' until the drop-down list opens and 'Justice of the Peace' is highlighted.
    - To open the list when you don't know what options might be there you can press the 'down arrow' key on your keyboard while focus is on the field but the list is not open
  - With 'Justice of the Peace' highlighted in the list, press the 'ENTER' key to select the highlighted choice.
    - Note: pressing 'ENTER' to select the highlighted choice is necessary before pressing the 'TAB' key to move to the next field
7. Mouse - select the appropriate entry with the left mouse button click and advance to the First Name field by pressing the 'TAB' key or by using the left mouse button.
8. Press the 'TAB' key twice or move mouse cursor to advance to the Last Name field. Enter a last name of the Justice of Peace and use the left mouse button to click on 'Search' button.

Medical Certifier Designation Search

**Medical Certifier Type**

Medical Certifier Type: Justice of the Peace

**Medical Certifier Information**

First Name: [Text Field] Middle Name: [Text Field] Last Name: Turner License#: [Text Field]

Designate Search Cancel

9. Use the Mouse to left click on any portion of the entry in the list that represents the medical certifier that should be designated.



10. Use the Mouse to left click on the 'DESIGNATE' button
11. The system will display a warning message: 'Are you sure you want to designate this medical certifier for the record?' Click on the 'YES' button and wait for the system to acknowledge the designation by displaying the following message: 'The record has been successfully designated.' Press the 'OK' button to complete designation and return to demographic data entry screen.
- Note: the absence of a designated medical certifier office/practice, as well as medical certifiers designated as 'Not Participating' will force a Drop-to-Paper event when the Demographic Verification is attempted (a process described in the Exercise 7.)
12. Once the data entry screen appears, use the Mouse to point to the 'Save Record' icon  and then click once with the left mouse button to save the changes before continuing to complete the data entry.
13. No visible changes will be apparent on the screen after the Medical Certifier Designation. In the case that the record designation is subsequently 'declined' by the Medical Certifier, the system captures a reason that the case is being declined and the record remains in Demographic data entry user's queue. The demographic data entry user can then re-designate a different medical certifier for the record.

Designation of a medical certifier initiates a two-step process: the medical certifier receives an e-mail or text message to notify them that a case has been added to their queue. The record appears in the appropriate medical certifier's view in the 'Record Status Screen' related to records that have been created but not 'Certified/Verified'. Any time the designated location is changed regarding a medical certifier, a new e-mail or text message will be generated as described for notification.

## Exercise 7 – Designation of the Local Registrar

Designation of the Local Registrar is the process that will determine what Local Registration Office has jurisdiction over the record. If the death occurs in a facility (hospital, nursing home, hospice) then the system will automatically designate the correct local registrar office based on the association between the facility and a local registrar. Otherwise, the funeral director or other person with 'Designate Local Registrar' as a process in their security profile must designate a Local Registrar before the record can be demographically verified.

Designation of the Local Registrar occurs when the Demographic section of the Death record is nearly complete and the record is ready to be released for further processing. The objective of this exercise is to complete a case of 'designation' of the Local Registrar on the record and explore various scenarios associated with this process. A Funeral Director who has already verified (and released) the demographic part of the record could still change the designated Local Registrar on the record if the case was 'Declined' by a Local Registrar.

*To complete this exercise, you will need:*

➤ A record created during previous exercises (Exercises 1 through 3)

1. Execute the steps in Exercise 1 to login and access the main menu. Then access Demographic Data Entry following steps in Exercise 2.
2. Start a NEW record by following steps outlined in Exercise 3, or utilize an existing record created while completing previous exercises.
3. The process of Designation can be initiated at any time after the record has been initially saved in the system. Using the mouse, point to the Designate icon.
4. The 'Local Registrar Designation' screen will appear:
5. Use the 'TAB' key or move mouse cursor to advance to the Last Name field. Enter a last name of the appropriate Local Registrar and use the left mouse button to click on 'Search' button.
6. Use the 'TAB' key or the mouse to advance to the entry in the search results grid and left mouse click on the 'Designate' button.
7. The system will display a warning message: 'Are you sure you want to designate this local registrar for the record?' Press the 'YES' button and wait for the system to acknowledge the designation by displaying the following message: 'The record has been successfully designated.' Press the 'OK' button to complete designation and return to demographic data entry screen.
8. Use the Mouse to point to the 'Save Record' icon  and then click once with the left mouse button to save the changes before continuing to complete the data entry.
9. No visible changes will be apparent on the screen after the Local Registrar. In the case that the record designation is subsequently 'declined' by the assigned Local Registrar, the system captures a reason that the case is being declined and the record remains in Demographic data entry user's queue. The demographic data entry user can then re-designate a different local registrar for the record.

## Exercise 8 - Demographic Verification

Demographic Verification finalizes the duties of the Demographic Participant for the Death Certificate data entry and forwards its submission for further processing. When the demographic data entry is complete, the Demographic Verification process is accessed for the funeral director to apply their PIN to the record. This locks the demographic portion of the record from further editing. This exercise will walk you through the steps necessary to complete a Demographic Verification of a record as well as introduce you to some of the implications of this process.

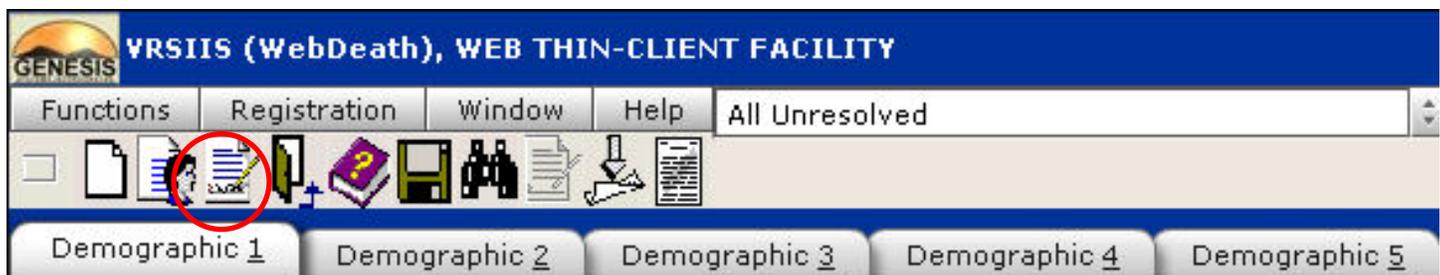
Note that Demographic Verification can be done without designating a medical certifier however the system will then assume that the medical certifier for that record is not participating in the electronic system. It therefore forces a 'drop-to-paper' process that creates a paper copy of the death certificate for completing the medical information and submission to the local registrar. If a record is 'dropped to paper' the remaining processing must be completed manually on the paper.

*To complete this exercise, you will need:*

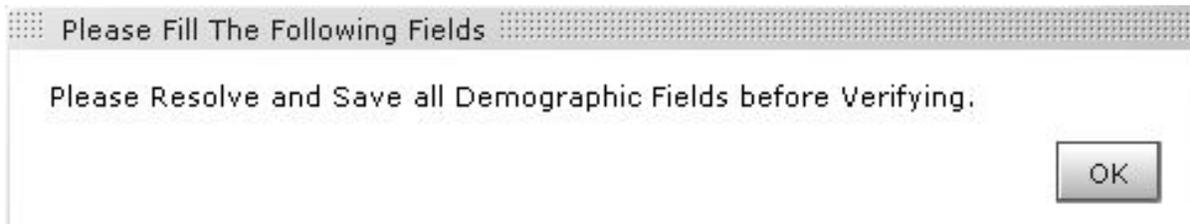
- A data entered record with all applicable demographic fields completed, resolved and record saved
- A valid PIN number (please obtain a valid PIN number from your training instructor if you have not been issued one.)

1. Execute the steps in Exercise 1 to login and access the main menu.
2. Start a NEW record by following steps outlined in Exercise 3, or utilize an existing record created while completing previous exercises.
3. Proceed to complete (resolve) all available demographic fields using the techniques learned in Exercise 5 and press the 'Save Record' icon.
4. The process of Demographic Verification, contrary to Designation, can only be initiated if all mandatory demographic data has been entered, resolved and the record has been saved.

Using the mouse, point to the Demographic Verification icon: .



5. In the case that some fields remain unresolved, the following message will appear:



6. If all applicable demographic fields are resolved, the following screen will appear:

A screenshot of a "Demographic Verification" form. The form is divided into three sections: "General Information", "Death Information", and "Verifier Information".  
- **General Information:** Fields for First Name (Joseph), Middle Name (Henry), Last Name (Gifford), and Suffix (empty).  
- **Death Information:** Fields for Date Of Death (11/04/2005), Date Of Birth (03/13/1932), and Gender (Male).  
- **Verifier Information:** Fields for Place Of Death (Hospital- Inpatient) and Demographic Verifier (James Gray).  
At the bottom right of the form, there are three buttons: "Preview", "Verify", and "Cancel".

7. The Demographic Verification screen provides three (3) options: 'Preview', 'Verify', and 'Cancel'.

- Pressing the 'PREVIEW' button will cause a Printing Message to appear: 'Are you sure you want to print this record?' (Y/N). Answering 'Y' will present a print preview of the death abstract so it can be reviewed before verifying it. The abstract can also be printed from this preview if desired. Exercising the Preview option will exit the verification process and the user will need to access the process again to verify the record.
- Pressing the 'VERIFY' button will initiate the Demographic Verification process.
- Pressing the 'CANCEL' button results in exiting from the Demographic Verification screen.

8. Press the 'VERIFY' button and complete the following two steps:

- Press the 'OK' button in the box with 'Please verify your PIN' message.
- Enter your PIN number into the next box and press 'OK'.

You will receive a message that demographic verification for the record has been successful. If that is not the case, complete the steps below.

9. The following message will appear if no Medical Certifier is designated on record, or a designated Medical Certifier is not participating electronically:

'You have not identified a Medical Certifier for this record using the 'Designate Medical Certifier' feature. The system will assume that this means that the medical certifier is not participating in the

electronic system. If this is the case, you must drop this record to paper and manually provide it to the medical certifier for completion before it can be filed. Initial certified copies must then be produced from the paper record at the Deputy County Registrar's Office in the county of death. Do you wish to drop this record to paper and process it manually? 'Yes/No'

- Pressing 'NO' will cancel the record from being demographically verified.
- Pressing 'YES' will cause the record to be Demographically Verified and will print it on the Drop-To-Paper form.

**10.** Execute one of the following scenarios to cause record to Drop-To-Paper for manual forwarding. Otherwise, go to next step.

- You have selected an non-electronically participating Medical Certifier and wish to forward a Drop-To-Paper copy manually, press 'YES'
- You have not designated a Medical Certifier and wish to forward a copy manually, press 'YES'.

**11.** Execute one of the following scenarios to file the record electronically.

- If you have not designated a Medical Certifier to this record and wish to do so, press 'NO' follow the steps in the Exercise 6. Make sure that you designate an electronically participating Medical Certifier. Then complete steps 1 through 8 for this exercise.

## Exercise 9 - Drop to Paper

'Drop-to-Paper' refers to the mechanism for handling records that are partially completed electronically but then encounter a provider who is not using the electronic system. This function will cause the record to be printed on the Texas Death Certificate for forwarding to a non-participating entity. After being manually completed by the non-participating entity, the paper Death Certificate must be ultimately filed with the Local Registrar and then the State office.

*To complete this exercise, you will need:*

- A record with all applicable demographic fields completed, resolved and record saved (processes described in Exercises 1 through 5.)
  - Make a point to skip the Designation of the Medical Certifier (Exercise 6)
  - The record must not yet be demographically verified.
1. Open a previously entered record or create a new one to complete all data items in demographic data entry. In this process be certain to either save the record at least twice or click the option to check the SSN Verification status so that the SSN verification process is resolved.
  2. Point and click on the icon to initiate the 'Demographic Verification' process.
  3. The following message will appear:  
'You have not identified a Medical Certifier for this record using the 'Designate Medical Certifier' feature. The system will assume that this means that the medical certifier is not participating in the electronic system. If this is the case, you must drop this record to paper and manually provide it to the medical certifier for completion before it can be filed. Initial certified copies must then be produced from the paper record at the Deputy County Registrar's Office in the county of death. Do you wish to drop this record to paper and process it manually? 'Yes/No'
  4. Press 'YES' to perform demographic verification and print the paper copy of the Death Certificate. Once a record has 'dropped-to-paper,' the electronic record becomes completely locked from further action by external users. All subsequently required certification or verification would occur on the paper document.



The separate icon that supports just the 'drop to paper' function  will rarely be needed since the application will typically force printing of the 'drop-to-paper' form when it applies. The icon can be used to re-print the drop-to-paper form if necessary due to loss or damage to the original.