Commonwealth of Kentucky

Cabinet for Health and Family Services

KENTUCKY ELECTRONIC DEATH REGISTRATION SYSTEM (KY-EDRS)

FUNERAL DIRECTOR
User Guide

WELCOME TO THE KY-EDRS

QUESTIONS?

FOR ASSISTANCE IN THE USE OF THE SYSTEM, OR ASSISTANCE IN RESETTING YOUR PASSWORD, CALL **(877) 545-6175**.

FOR ASSISTANCE IN PROPER COMPLETION OF THE DEATH CERTIFICATE, CALL THE STATLINE AT **(866) 451-3781**, OR CALL **(502) 564-4212 EXTENSION 3260 or 3231**.

The main purpose of the KY-EDRS is to electronically file and register certificates of death.

As a funeral home participant, once you have started the electronic certificate of death, please do not abandon the electronic record (see helpful hints on page 13).

If you experience difficulty of any kind during the electronic filing, please call the phone numbers as listed above for assistance.

As medical certifiers choose to participate in the KY-EDRS, their names will appear in the medical certifier drop-down listing. In case their specific name is not in the drop-down listing, you may select the facility in which the medical certifier practices.

If a medical certifier is currently not a participant in the KY-EDRS, the drop to paper functionality will allow the certificate to be printed once the funeral home's portion is completed and the funeral home director has electronically signed the certificate. The drop to paper certificate can then be mailed to the medical certifier.

Table of Contents

INTRODUCTION

Welcome to the Kentucky Electronic Death Registration System (KY-EDRS). This secure web-based system was designed to replace the current manual processes associated with the filing of death certificates. The KY-EDRS will be used by funeral home directors and funeral home director assistants, medical certifiers and medical certifier assistants, and personnel in the Cabinet for Health and Family Service's Office of Vital Statistics (OVS).

Benefits

The KY-EDRS provides many benefits. Among these benefits are:

➢ **Expedited death registration process**

Electronic submission and workflow eliminates the time involved in mailing or delivering certificates to other parties.

➢ **Increased accuracy of death certificates**

Edits built into the system will prevent many data reporting errors and omissions.

➢ **Electronic communication between system users**

Funeral home directors and staff, medical certifiers and staff, and the OVS personnel are electronically notified when they have been assigned or reassigned a death certificate. Message boards give funeral home and medical certifier users the ability to attach electronic messages to records.

➢ **Tracking of status of death certificates**

Users of the KY-EDRS have the ability to view the status of death certificates to determine the current stage of processing the document.

➢ **Verification of social security numbers**

A link between the KY-EDRS and the Social Security Administration allows real-time verification of social security numbers and eliminates the need to prepare Form SSA-721 in cases of successful verifications.

➢ **Streamlined process for ordering death verifications, Veterans Administration copies, and certified death certificates**

Funeral home personnel have the ability to place the orders for death verifications, Veterans Administration death certificates and certified copies of death certificates within the KY-EDRS at the time of filing.

➢ **Export data function**

Funeral homes that utilize management software packages have the ability to export data from the KY-EDRS to the management software package, eliminating the need for duplicate entry of records.

Flow of the KY-EDRS

Preparation and completion of an electronic death certificate follows the steps listed below. Each step will be discussed in further detail within this guide.

➢ **Funeral director takes possession of the deceased**

When a funeral director takes possession of the deceased, the funeral director portion of the death certificate will be completed electronically. If the medical certifier is a KY-EDRS user, the funeral director electronically signs the certificate and electronically submits it to the medical certifier. A funeral director assistant may complete portions of the death certificate and assign it to the funeral director for signature and submission to the medical certifier.

If the medical certifier is NOT a KY-EDRS user, the funeral director completes the funeral director's portion, prints the certificate on 25% cotton bond paper with a visible watermark, and manually forwards the printed certificate to the medical certifier. This process is "Drop-to-Paper".

➢ **Medical certifier receives death certificate from funeral director**

If the medical certifier is a KY-EDRS user, the death certificate will be received electronically from the funeral director. After verification that the death certificate belongs to the assigned medical certifier, the medical portion will be completed electronically, electronically signed by the medical certifier, and then electronically submitted to the OVS for further processing.   A medical certifier assistant may complete the medical portion of the death certificate, and assign it to the medical certifier for electronic signature and submission to the OVS.

If the medical certifier detects any errors in the funeral director's portion of the certificate, the medical certifier may electronically reassign the certificate to the funeral director.

If the medical certifier is NOT a KY-EDRS user, he/she will receive a paper copy of the certificate from the funeral director. The medical certifier will manually complete and return the certificate to the funeral director for submission to the OVS according to current procedures.

> ➤ **Office of Vital Statistics (OVS)**

If the medical certifier is a KY-EDRS user, the medical certifier will electronically submit the death certificate to the OVS. OVS personnel will review the certificate and if any discrepancies are found, the OVS has the ability to reassign directly to the funeral director, medical certifier, or both. If no discrepancies are found, the OVS staff will complete the filing of the death certificate and assign a state file number. Requests for copies and certified copies will be processed.

If the medical certifier is NOT a KY-EDRS user, the completed paper copy of the certificate will be returned to the funeral home, and the funeral home will send the certificate to the OVS. The certificate is then reviewed by the OVS and processed in accordance with current procedures.

> ➤ **Tracking of status**

Users of the KY-EDRS have the ability to track the status of a death certificate from the time it is started through completion.

> ➤ **Electronic notification**

KY-EDRS users can be notified via email whenever a KY-EDRS case is assigned to them. Additionally, KY-EDRS users have the option of being notified via email whenever the status of a death certificate changes.

NOTE: PROVISIONAL REPORTS OF DEATH (VS-34) ARE NOT INCLUDED IN THE KY-EDRS AT THIS TIME.

Help Desk Telephone Numbers

Cabinet for Health and Family Services (CHFS) personnel are available to answer questions or provide assistance in using the KY-EDRS. Please use the following telephone numbers:

> ➤ For questions regarding use of the KY-EDRS call (877) 545-6175 between the hours of 8:00 and 4:30 (Eastern Time).
> ➤ For assistance in resetting your password call (877) 545-6175 between the hours of 8:00 and 4:30 (Eastern Time).
> ➤ For questions regarding proper completion of the death certificate (business rules) call the STATLINE at (866) 451-3781, or call (502) 564-4212, extensions 3260 between the hours of 8:00 and 4:30 (Eastern Time).

TECHNICAL REQUIREMENTS

Internet Connection
A high speed internet connection is required.

Browser
The KY-EDRS is designed to operate with Internet Explorer 6.0 or higher. After December 31, 2010, only Internet Explorer 8.0 or higher will be supported.

Monitor Resolution
The KY-EDRS can best be displayed with screen resolution set at 1024 X 768 pixels.

ACCESS TO THE KY-EDRS
The KY-EDRS is a secure web site with Secure Socket Layer (SSL) 128-bit encryption. Requests for access to the system are reviewed and granted final approval by the OVS personnel.

> **A VALID USERNAME AND PASSWORD ARE REQUIRED TO ACCESS THE KY-EDRS. IT IS IMPORTANT THAT PROPER SAFEGUARDS BE USED TO PROTECT THE CONFIDENTIALITY OF YOUR USERNAME AND PASSWORD. INFORMATION ENTERED IN THE KY-EDRS WITH YOUR USERNAME AND PASSWORD CONSTITUTES AN ELECTRONIC SIGNATURE. DO NOT SHARE YOUR USERNAME AND PASSWORD WITH ANYONE. DO NOT POST YOUR USERNAME AND PASSWORD IN A CONSPICUOUS PLACE. LOCK YOUR COMPUTER OR LOG OUT OF THE KY-EDRS WHEN LEAVING YOUR WORKSTATION.**

Roles in the KY-EDRS
Funeral director and funeral director assistant roles are available within the KY-EDRS. Specific tasks available to both these roles include:

➢ Add or edit electronic records
➢ Verify social security number (SSN) on electronic records with SSA
➢ Assign a record to another funeral director within the same facility
➢ Search for a participating medical certifier
➢ Assign a record to a medical certifier
➢ Add or review message board entries

- ➢ Print draft copies of death certificates
- ➢ Read-only access to medical certifier portion of certificates
- ➢ Edit returned records from the OVS or medical certifiers
- ➢ Print "Drop-to-Paper" if a medical certifier is not a KY-EDRS user (on 25% cotton bond paper with visible watermark)
- ➢ Request copies of death verifications, Veterans Administration and certified copies of death certificates
- ➢ View completed records
- ➢ Export data function

Funeral director roles include the following additional functionality that is not available to the funeral director assistant roles:

- ➢ Approve and electronically sign electronic records
- ➢ Submit electronic records to medical certifiers
- ➢ Submit requests to grant access to the funeral directors' assistants

> **FOR DETAILED INSTRUCTIONS TO REGISTER AND OBTAIN**
> **ACCESS TO THE KY-EDRS, PLEASE REFER TO PAGE 48 IN**
> **THE LAST SECTION OF THIS USERS GUIDE.**

NAVIGATING THROUGH THE KY-EDRS

Some navigation options are common throughout the KY-EDRS. These will be described in this section. Specific screens will be addressed in subsequent sections of this guide.

Web Addresses

"Real Live-Data Actual Production" https://kog.chfs.ky.gov/home/default.aspx **(for REAL LIVE-DATA "PRODUCTION")**. You may type this address directly into your web browser's address line.

Moving from One Field to Another

The tab key can be used to move from one field to another within the KY-EDRS. Clicking the left mouse button on the desired field will also position the cursor in that field.

Mouse Roller Ball

Exercise caution when using the mouse roller ball to scroll up and down a screen. Once you have made a selection in the drop-down box, be sure to click out of the drop-down box before scrolling. Otherwise, incorrect data may be selected.

Drop-down Boxes

Many fields contain drop-down boxes reflecting a variety of selections. You may click the arrow, scroll through the list, and click the appropriate entry. Alternatively, you can click in the box and press the appropriate letter for your selection. If multiple selections begin with the same letter, continue pressing the letter until the correct selection appears. For example, to make a selection of "Allen" in the "County" field, pressing the "A" key once brings up "Adair". Pressing the "A" key a second time brings up "Allen".

Required Fields

Required fields are indicated with a red asterisk.

Date Fields

Date formats are generally two digit month, two digit day and four digit year (mm/dd/yyyy). It is not necessary to enter the diagonal slash marks; the system will enter them for you as you key in the date.

Left Menu Bar

A menu bar located on the left side of the screen enables you to go to another screen.

Previous and Next Buttons

Previous and Next buttons may be used to move from one screen to another. **DO NOT USE YOUR BROWSER'S BACK ARROW BUTTON OR THE KEYBOARD BACKSPACE KEY TO RETURN TO THE PREVIOUS SCREEN!**

Cancel Button

The Cancel button is used to cancel the activity in process. The data you entered on the current screen will not be retained.

Save & Exit

Clicking on the Save and Exit button allows you to save the information entered prior to closing that particular record.

Task List

Some screens (to be noted later in this guide) may show a Task List when an attempt is made to leave that screen. The items in the "Task List" are incorrect or omitted "required" entries. The associated fields will be highlighted in yellow.

Skip Tasks and Continue

The Skip Task and Continue box can be checked to allow the user to proceed to another screen or save and exit the record without making corrections to the errors listed. The user can return later to this screen to correct or add information.

Logout

IT IS IMPORTANT THAT YOU LOGOUT PROPERLY FROM THE KY-EDRS WHENEVER YOU ARE FINISHED WITH A SESSION. ALWAYS SELECT THE **LOGOUT** BUTTON FROM THE LEFT MENU BAR TO LOGOUT.

GETTING STARTED

Login Screen

The login screen allows registered KY-EDRS users to access the system.

Enter your Username and Password, taking care to ensure the appropriate upper or lower case is used.

Click the **Sign-In** button, and then select KY-EDRS from the Application List.

Facilities Information Screen

If a user has registered for more than one facility, or for more than one role, the Select Facility Screen will be shown to allow the user to make the appropriate selection. For users registered for only one facility, the Home Screen will appear after clicking the **Accept** button on the Login Screen.
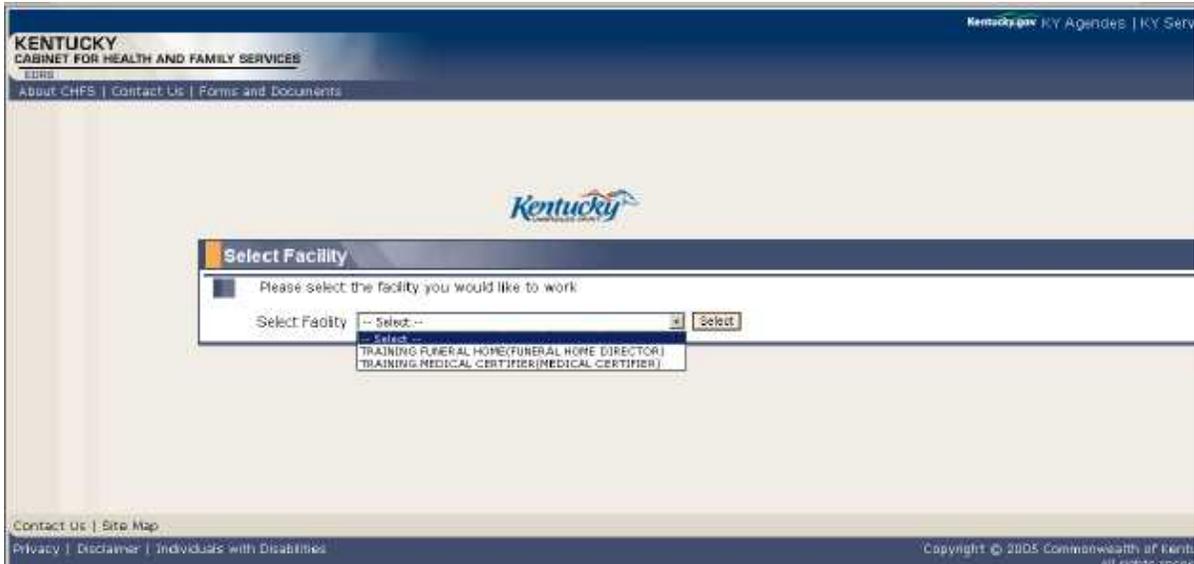
Select the desired facility from the drop-down box, and then click the **Select** button. This will take you to the Home Screen.

Home Screen

The Home Screen allows users to:

> ➢ view a list of cases and the status of each case,
>
> ➢ select a particular case for action,
>
> ➢ begin creation of a new case,
>
> ➢ set preferences for email notifications,
>
> ➢ export data,
>
> ➢ view or print a copy of the user guide
>
> ➢ print a copy of the Form SSA-721 instructions
>
> ➢ print a copy of the Form VS-31-B to order death certificate copies and verifications, and
>
> ➢ logout.

Left Menu Bar

Case Lists

Cases Lists

The Cases List on the Home Screen shows three lists of funeral home cases. Clicking on the appropriate tab will show:

➢ 'Active Cases' are cases which have originated in the funeral home, and still require action by the funeral home.
➢ 'Completed Cases' are cases which have originated in the funeral home, and processing by the OVS has been completed.
➢ 'All Cases' contains the list for all cases entered by the funeral home. This list includes both active and completed cases, as well as cases that have been submitted to medical certifiers.

Lists may be sorted by clicking on the desired column header. The columns shown include:

- State File Number – this is the number assigned by the OVS upon approved filing of a death certificate. This column appears only on "Completed Cases" and "All Cases" lists.
- KY-EDRS Case # – the KY-EDRS Case # is a unique identification number assigned by the system once a new case has been started. The number follows the format EYYYYMMDDXXXX. The "E" indicates the case was originated in the KY-EDRS. The "YYYY", "MM", and "DD" indicate the entry date the case was started in the KY-EDRS. "XXXX" is a sequential number for all KY-EDRS cases, starting with "0001" for the first case entered each day.
- Decedent's Last Name
- Decedent's First Name
- Date of Death
- County of Death
- Status of Case – this column appears on "Active Cases" and "All Cases" lists.
    - Case Started by Funeral Home
    - Dropped-to- Paper
    - Submitted to Medical Certifier
    - Accepted by Medical Certifier
    - Submitted to the Office of Vital Statistics
    - Re-Submitted to the Office of Vital Statistics
    - Approved by the Office of Vital Statistics
    - Returned to Funeral Director by the Office of Vital Statistics
    - Returned to Medical Certifier by the Office of Vital Statistics
    - Returned to Funeral Director and Medical Certifier by the Office of Vital Statistics
    - Rejected by Medical Certifier
    - Reset by OVS (for drop-to-paper cases)
- Certificate Type – indicates if case was completely electronic or drop-to-paper.
- View Certificate – appears only on "Completed Cases" list.
- Post or View Messages – appears only on "Active Cases" and "All Cases" lists.
- Case History

From the "Selected View" drop-down box, you may choose to view the latest twenty cases or all recent files (those cases that were entered in the last two months.) Cases are archived two months after completion.

For lists of all recent cases, each screen includes up to ten cases, with the most recent case listed first. When there are more than ten cases, a message will indicate "Page 1 of X Pages". Movement to other

screens in the list can be accomplished by clicking on the"1st Page", "Prev", "Next", or "Last Page" buttons.

Search for a Case

To quickly locate a case within the funeral home, click the **Search Case** tab.

Fields that may be used to search include:

➢ Decedent's Last Name
➢ Decedent's First Name
➢ Date of Death
➢ County of Death (select applicable county from the drop-down box)
➢ KY-EDRS Case #
➢ Facility Case #
➢ Case Status (selected from a drop-down box)

After entering data in at least one field (in addition to the "Search Within" field), click the **Search** button.

Search Results Screen

Records which meet the search criteria are shown on the Search Results Screen.

To perform another search, first click the **Reset** button and enter the new search criteria.

ENTERING A NEW CASE

Click the **Create New Case** button located in the Left Menu Bar to begin entry of a new case.

Helpful Hints

➢ If you begin a record in the KY-EDRS and have difficulty completing any portion of the death certificate, please do not abandon the record.

➢ If a problem occurs after the Office of Vital Statistics' business hours, please wait until the next business day to call for assistance.

➢ If you are an active KY-EDRS participant, please refrain from re-creating a certificate for the same case you have entered in the KY-EDRS.

➢ A typed certificate of death should not be completed and submitted to the Office of Vital Statistics for any death record that has been started in the KY-EDRS. The drop to paper functionality will allow the certificate to be printed when the funeral home director has completed his/her portion.

➢ For example: If a medical certifier cannot be located in the medical certifier drop-down listing, you have the option to select "drop to paper" and mail the printed electronic death certificate to the medical certifier;

➢ Or, if you can locate the medical facility where the medical certifier practices, you can select the facility for the death certificate to be submitted electronically;

➢ Or, if you choose the medical certifier from the list, then realize they have not completed the registration process, please call the OVS to have the death record reset. DO NOT START THE RECORD AGAIN ON PAPER!

Create New Case Screen

Entry of decedent details begins on the Create New Case Screen. The KY-EDRS is customized so that data entry options vary depending upon answers to previous questions.

Required fields are marked with a red asterisk. Complete the following fields on this screen:

- **1a** – Enter the decedent's legal name. First and last names are required.   Enter the middle name if it exists. Select suffix (if applicable) from the drop-down box. Enter alias or AKA if applicable. If a part of the name is only an initial, do not enter a period after the initial.
- **2** - Select the sex of the decedent from the drop-down box.
- **3** - Enter the actual or presumed date of death, and click the appropriate box ("Actual", "Presumed", or "Date Found").
- **4**- If the decedent's social security number (SSN) is available, select "Yes" from the drop-down box. The screen will be refreshed to show boxes for entry of the SSN. Enter the digits only, no dashes. The cursor will automatically advance to the next box.

  If SSN is not available, select "No" from the drop-down box. The screen will be refreshed to allow selection of "Not Obtainable", "None", or "Unknown". Click the appropriate box.

- **6** - Enter the decedent's date of birth. If unknown, click "Unknown" box.

- **5a –c** – Click the **Calculate Age** button. If the date of birth is unknown, click the "Unknown" box in the "Age" field. If the decedent is less than one year old, enter the appropriate number of months and days.   If the decedent is less than one day old, enter the appropriate number of hours and minutes.
- **7** - Select county of death from the drop-down box.

Click the **Next** button.

To prevent a duplicate entry of a record, the system searches for a record that has already been started for a decedent with the same name, date of death, and county of death. If a possible duplicate record is found, you will see a message on the bottom of the screen as shown below:

To continue processing a record that is listed in the "Possible Matches" grid, click the **Select** button to the left of the record, then click the **Select** button at the bottom of the screen.

If you are sure this is a different case, click the **Continue** button to proceed with the current record you have started.

Decedent Information 1 Screen

The Decedent Information 1 Screen is pre-populated with data entered on the previous screen.

Complete the remaining fields:

- ➢ **8** - Select place of death from the drop-down list. If "Other" is selected from the drop-down list, the screen will be refreshed with a text box to specify the place of death.
- ➢ **9** – Select facility name from the drop-down list.   If the facility name does not appear on the drop-down list, select "Other" from the list. The screen will be refreshed with a text box to allow entry of the facility name. This question will not be shown if the place of death in Question 8 is "Residence" or "Other".

- ➢ **10** - Facility address is populated with address of the facility selected. If place of death is "Residence", enter residence address. If "Other" is selected from the place of death or facility name drop-down lists, enter appropriate address, city and zip code.
- ➢ **11** – Enter the city of the birthplace and select the state from the drop-down box. Check "Unknown" if no details of birth place are known. If partial place of birth details are known, enter "City" if known, otherwise check the "Unknown" box.
- ➢ Select "State" from the drop-down box if it is known. If the place of birth is known to be in the United States, but the state is unknown, select "Unknown".   If the place of birth is known to be in another country, select "Other Country" from the drop-down box. The other country can then be identified and selected from the drop-down box. If the other country is not on the list, select "Other" and enter the name of the country in the "Specify" box. If the place of birth is known to be in another country, but the country is not known, select "Unknown" from the drop-down box.
- ➢ **12** – Select the appropriate marital status from the drop-down box.

Click the **Next** button to proceed to the next screen.

Decedent Information 2 Screen

Entry of decedent details continues on the Decedent Information 2 Screen.

Complete the following fields on this screen:

- **1b** – Enter the decedent's last name prior to first marriage. This question will not appear for males or for females with a marital status "Never Married" or "Unknown".

- **13** – Enter the name of decedent's surviving spouse. If the decedent is male, enter the surviving spouse's name prior to first marriage. This field will only be available if marital status is either "Married" or "Married but Separated".

- **14** – Enter the decedent's usual occupation in the text box. <u>Do not enter "Retired"</u>. Check the "Unknown" box if the decedent's usual occupation is not known. This field will not be available if the decedent's "Age Last Birthday" is less than 14.

- **15** – Enter the decedent's kind of business/industry in the text box. Check the "Unknown" box if the decedent's business/industry is not known. This field will not be available if the decedent's "Age Last Birthday" is less than 14.

- **16** – Select the appropriate entry from the drop-down box to indicate if the decedent was ever in the US Armed forces.

- **17 a-f** – Enter the address of the decedent's residence. If the address is not known, check the "Unknown" box.

  Enter address line 1, suite/apt (if applicable), and address line 2 (if applicable) in the text boxes. Select "State" from the drop-down box, and then select "County" from the drop-down box. Select the decedent's "City" of residence from the drop-down box, and then select the appropriate "Zip Code" from the drop-down box. If the desired "City" or "Zip Code" is not listed, select "Other" from the drop-down box, then type the correct entry in the "Specify" text box.

  Select the appropriate entry from the drop-down box to indicate if the decedent resided within city limits.

  If the decedent's residence is outside the United States, select "Other Country" from the "State" drop-down box. The other country can then be selected from the drop-down box for "Country". If the other country is not on the list, select "Other" and enter the name of the country in the "Specify" box. Enter the postal code.

- **18** – Select "Decedent's Education" from drop-down box. Select "Unknown" if information is not known.

- **19** - Select the appropriate entry from drop-down box for "Decedent of Hispanic Origin?" If the "Yes, Other Spanish/Hispanic/Latino" is selected, type the appropriate entry in the "Specify" text box.

- **20** – Check the appropriate entry or entries to indicate the "Decedent's Race". Check as many entries as may apply.

If "Other Asian", "Other Pacific Islander", "American Indian or Alaska Native", or "Other" is selected, enter the other race in the "Specify" box.

Select "Unknown" if the "Decedent's Race" is not known.

Click the **Next** button to proceed to the following screen.

Parents Information Screen

Information about Parents, Informant, and Disposition is entered on this screen.

Parents Information

Parent's information is entered in this portion of the screen.

➢ **21** – Enter the appropriate information in Father's Name fields. If the decedent's father's name is not known, enter UNKNOWN in "Last Name" and "First Name" fields.

➢ **22** – Enter the appropriate information for the decedent's Mother's Name prior to her first marriage. If the mother's name is not known, enter UNKNOWN in "Last Name" and "First Name" fields.

Informant Information

Information relevant to the informant is entered on this portion of the screen.

- **23b** – Select appropriate entry from the drop-down box for "Relationship to Decedent". If "Other" is selected, type the relationship in the "Specify" box.
- **23a** – Enter the Informant's Name. If "Father", "Mother", or "Spouse" were selected in the "Relationship to Decedent" question, the Father's, Mother's, or Spouse's name will be populated from the information entered previously. If "Mother" is selected, the mother's first name will be populated. Enter the mother's last name.
- **23c** – Enter the informant's mailing address. Type address line 1, suite/apt (if applicable), address line 2 (if applicable), and city in the text boxes. Select "State" from drop-down box. Enter the informant's Postal Code in the text box.

  If the informant's residence is outside the United States, select "Other Country" from the "State" drop-down box. The other country can then be selected from the drop-down box for "Country". If the other country is not on the list, select "Other" and enter the name of the country in the "Specify" box.

Disposition Information
Disposition details are entered on this portion of the screen.

- **24** – Select the method of disposition from the drop-down box. If "Other" is selected, enter and identify the method in the "Specify" text box.
- **25** – Enter the "Place of Disposition" in text box.
- **26** – Enter the "Location of Disposition". Enter the name of the city in the text box. Select the state from the drop-down box.

  If the place of disposition is outside the United States, select "Other Country" from the "State" drop-down box. The other country can then be selected from the drop-down box for "Country". If the other country is not on the list, select "Other" and enter the name of the country in the "Specify" box.

Click the **Next** button to proceed to the following screen.

SSN Verification Screen

This screen is used to verify the SSN with the Social Security Administration.

 The information appearing on this screen is pre-populated from previous screens' entries.

Click the **Yes, Verify SSN** button if verification is desired.

Wait approximately ten seconds, and then click the **Refresh** button.

A response should be received from the SSA within seconds, and will be shown on the SSN Verification Status line.

THE FUNERAL DIRECTOR OR FUNERAL DIRECTOR ASSISTANT MUST MAKE AT LEAST ONE ATTEMPT TO VERIFY SSN PRIOR TO SUBMITTING THE CASE TO A MEDICAL CERTIFIER. A MAXIMUM OF FIVE ATTEMPTS MAY BE MADE. IF A SUCCESSFUL VERIFICATION RESPONSE IS NOT RECEIVED, THE FUNERAL DIRECTOR OR FUNERAL DIRECTOR ASSISTANT MUST COMPLETE A PAPER FORM SSA-721.

The SSA hours of operation are:

➢ Monday – Friday (5:00 am – 1:00 am)
➢ Saturday (5:00 am – 11:00 pm)
➢ Sunday (8:00 am – 11:30 pm)
➢ Available during federal holidays
➢ Not available during announced maintenance

If a confirmation response is received from the SSA, it is not necessary to complete a paper Form SSA-721; however, the funeral director should provide the Form SSA-721 instruction sheets to the decedent's survivors. These instruction sheets may be printed from the left menu bar on the Home Screen.

The following responses may be received when an SSN has been submitted for verification:

➢ New request waiting for submission.
➢ Verification request is pending…please wait.
➢ SSN has been successfully validated.

Other responses may be received:

➢ **SSN** has not been successfully validated. Please update and reverify.
➢ **Gender** has not been successfully validated. Please update and reverify.
➢ **Date of birth** has not been successfully validated. Please update and reverify.
➢ **Date of birth and gender** have not been successfully validated. Please update and reverify.
➢ **Name** has not been successfully validated. Please update and reverify

When these responses are received, correct the applicable fields, and then submit again for verification.

Click the **Next** button to proceed to the next screen.

Certificate Ordering Screen

NOTE: This screen is only to be used if your order requires payment AND you choose to pay electronically. Complete form VS-31-B if you do not choose to pay electronically. A copy of this form can be selected and printed from the left menu bar on the Home Screen. The completed form and payment should be mailed to the OVS in the color-coded envelope.   Please include the KY-EDRS Case Number on the form. The order will be processed as an initial order and copies will be mailed within two business days following the assignment of a State File Number.

The certificate ordering screen is used to order death verification copies, Veterans Administration copies, and certified copies, and to make payment electronically. Your order will be fulfilled and mailed within two business days following the assignment of a State File Number.

If only fee free certificates are ordered (i.e., 2 VA copies and 3 death verifications); and, (USPS) US Postal Service is the mailing option you select, there will be no payment due.

If certified copies are within your order; and, (USPS) US Postal Service is the mailing option you select, there will be a payment due for the certified copies and a $2.00 convenience fee.

If certified copies are within your order; and UPS Expedited Service (usually overnight delivery within Kentucky) is the mailing option you select, there will be a payment due for the certified copies, a $2.00 convenience fee, and the cost of the UPS Service selected.

Certificate Ordering

Click the drop-down box to select the number of death verification copies you would like to order.

Click the drop-down box to select the number of Veterans Administration copies you would like to order. This line will only show if previous entry indicated the decedent was ever in the US Armed Forces.

Click the drop-down box to indicate if you would like certified copies, and if so, the number of certified copies. The fees will be calculated for certified copies.

Shipping Information

Select the desired shipping method from the drop-down box. The selected shipping costs and the convenience fee will be automatically calculated.

No Payment Due

If you have only ordered verification copies and/or Veterans Administration copies, and if the shipping method is USPS (United States Postal Service) or pick-up, there is no payment due. After entering the requested number of copies and the shipping method, click the **Process Order** button as shown below. Then click the **Next** button to proceed with completion of the certificate.

Certificate Payment

If you have ordered certificates requiring payment, you may choose to pay by credit card or electronic withdrawal of funds from your bank account. Click the appropriate button to select your method of payment.

Click the **Pay Now** button to enter payment details.

Payment Screen

Applicable credit card details are entered on the following screen:

Click the **Submit** button.

If you choose to pay by electronic withdrawal of funds from your bank account, details are entered on the following screen:

Read the authorize statement at the bottom of the screen and check the adjoining box if you agree to the terms. Click the **Complete Payment** button.

Certificate Ordering Confirmation Screen

The following confirmation screen will be shown. You may print a copy for credit card or bank account reconciliation.

Sign and Submit Screen

Use the Sign and Submit Screen to select a Medical Certifier or to Drop-to-Paper.

Decedent Information

This information is pre-populated from entries made on previous screens. Review this information, and if corrections are necessary, click the **Edit** button. This will take you to the proper screen to make the necessary corrections.

You may also click the **View Certificate** button to view a draft copy of the death certificate.

If your facility assigns a case number or account number, you may enter this number in the **optional** field **Funeral Home Case Number**.

Select Medical Certifier OR Drop to Paper

Click the **Select Medical Facility** button to search for medical certifiers and medical certifier facilities. The following search screen will be displayed:
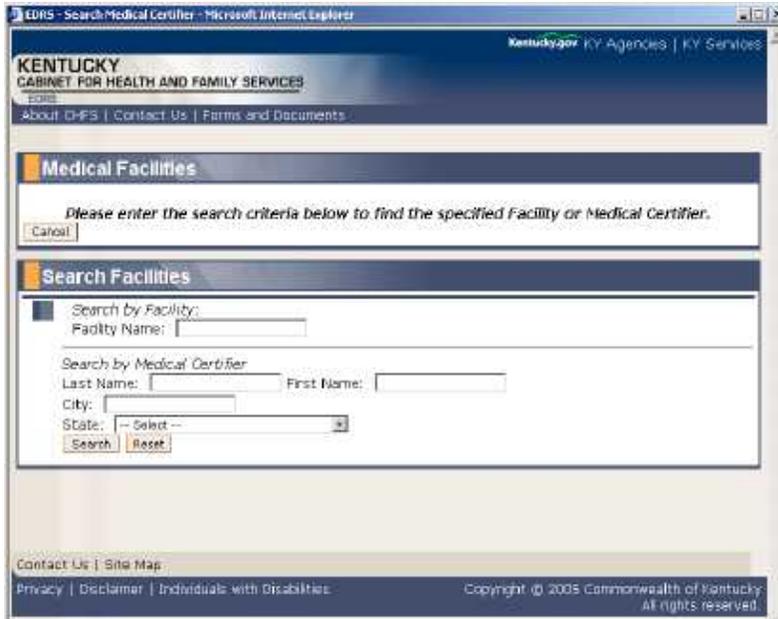
Enter the search criteria (Facility Name and/or Medical Certifier) and click the **Search** button. You may search only by facility name or only by medical certifier, or you may search using a combination of the two.
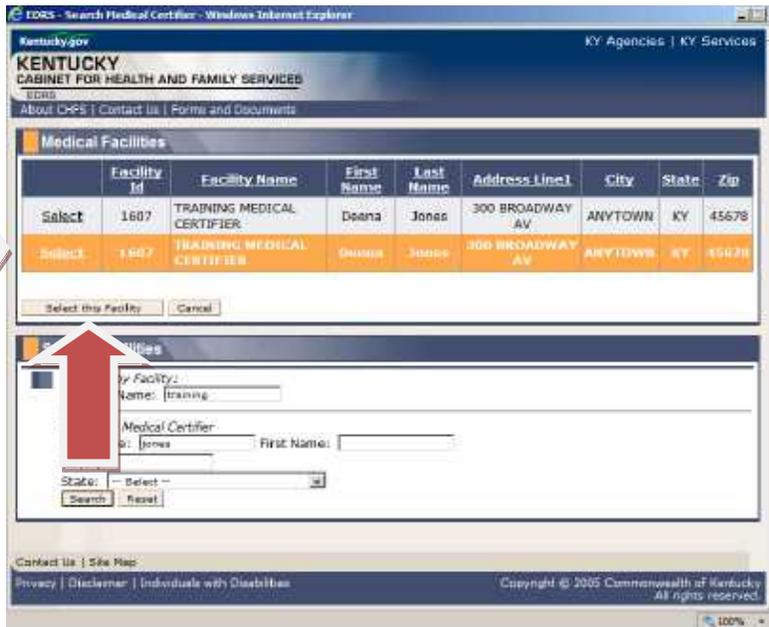
Results meeting the search criteria will be listed at the top of the screen.

Click the **Select** button next to the desired certifier, then click the **Select this Facility** button.

Medical Certifier

The Medical Certifier portion of the screen will now be populated with the selected medical certifier details.

Review the information, click the box that reads "I accept that the above information is correct" and click the **Submit to Medical Certifier** button.

You will receive a screen asking if you are sure you want to submit the record to the selected medical certifier. You may click the **OK** button if you have selected the correct certifier. If you would like to select a different certifier, click the **Cancel** button.

Confirm Screen

You will receive a screen confirming that the certificate of death has been transmitted to the selected medical certifier.

Drop to Paper

While performing the medical certifier search mentioned above, if the desired facility or medical certifier does not appear on the search list, this means the facility or medical certifier are not currently registered users of the KY-EDRS. Click the **Cancel** button to return to the Assign Medical Certifier Screen, where you click the "Select Drop to Paper" box. As facilities and medical certifiers are added to KY-EDRS, they will be added to the list and will be available to select.

Review the Decedent Information and view the certificate. If you are satisfied that all information is accurate, click the box stating "I accept that the above information is correct." Then click the **Submit as Drop to Paper** box.

You will receive a prompt asking if you are sure you want to drop to paper. Click the **OK** button to drop to paper. Click the **Cancel** button if you do not choose to drop to paper.

Dropped to Paper Screen

The following screen will be shown, confirming that you have selected the drop-to-paper option (paper is required to be 25% cotton bond with a visible watermark). Click the **Print Draft Certificate** button to print a draft certificate for your files. Click the **Print on Cotton Bond Paper** button to print the original certificate.
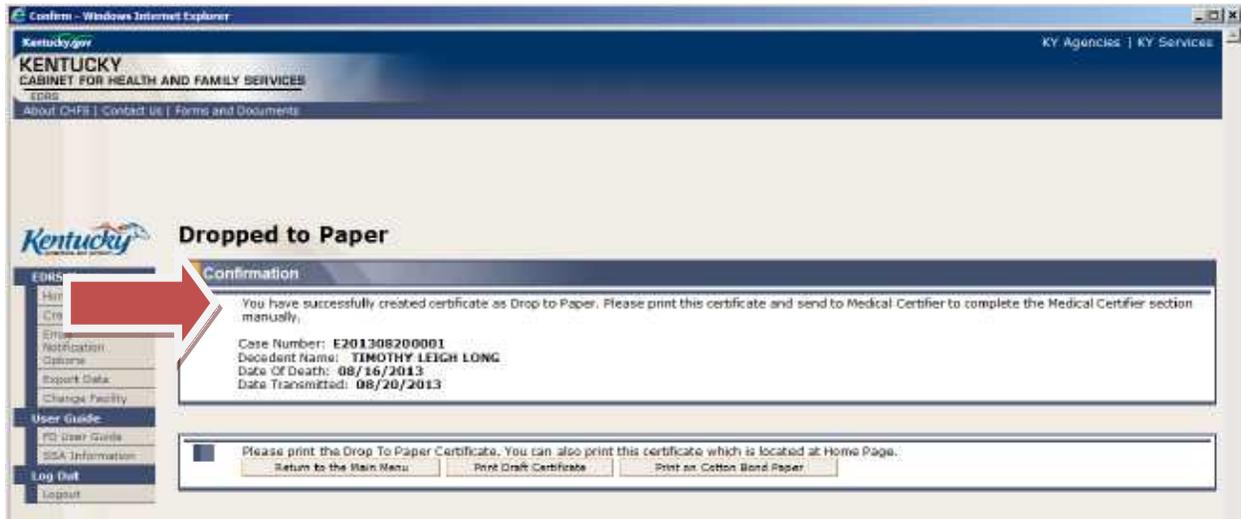
When the original certificate is printed, the heading "Kentucky Certificate of Death" and the bottom portion of the form "FORM VS NO. 1-A and (REVISED 07/2010)" **may not** print on the original certificate. If this happens, you can adjust your printer settings in the following manner:

When the certificate is displayed on the screen, click the upper left **"Print Icon".** When the "Print" settings screen appears, click the **"Page Scaling"** down arrow and select **"Shrink to Printable Area"**. Click **"OK"**. This will ensure the original certificate will print correctly.
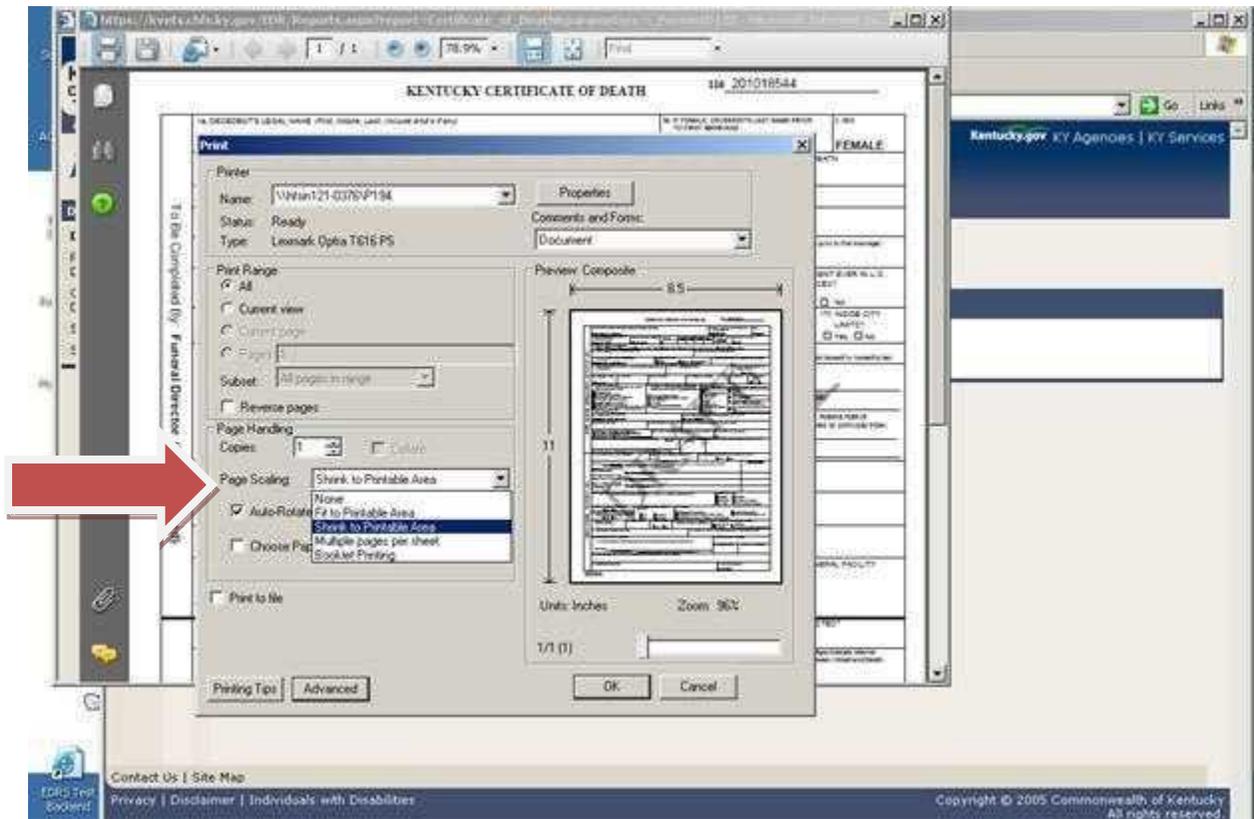
Follow your current manual procedures to forward to the medical certifier for manual completion of the death certificate.

TASK LIST

If you attempt to leave a screen prior to completing all the required fields, or if some of the entries in the fields do not pass system edits, you will receive a "task list" at the top of the screen reflecting the omitted or erroneous fields. Those fields will be highlighted in yellow.

You may correct the errors and proceed to the next screen. You also have the option to click the **Skip these tasks** button. This will allow you to proceed to the next screen, and return to this screen at a later time for completion.

SAVING A RECORD PRIOR TO COMPLETION

There may be instances when you are unable to complete the entire process of entering the death certificate details until a later time. In these cases, click the **Save and Exit** button. If you have not completed all the details on the current screen, you will receive a task list as shown in the previous section. Click the **Skip these tasks** button, then click the **Save and Exit** button.

When you are ready to complete the case, select the case from the Active Cases List on the Home Screen.

MESSAGE BOARD

The KY-EDRS provides the ability to attach message(s) to a particular case. **The Message Board is a means of communication between Funeral Directors and Assistants, Medical Certifiers and Assistants, Coroners and Deputy Coroners. The OVS will not monitor the messages posted, so please do not attempt to communicate with OVS via the Message Board.**

From the Cases List, click the "Post/View Messages" column for the desired record.

If a message is attached to a particular record, the words **Post/View Messages** will be in bold type.

The Message Board Screen shows a history of messages attached to the record. To add a new message, type the message in the text box and click the **Submit** button.
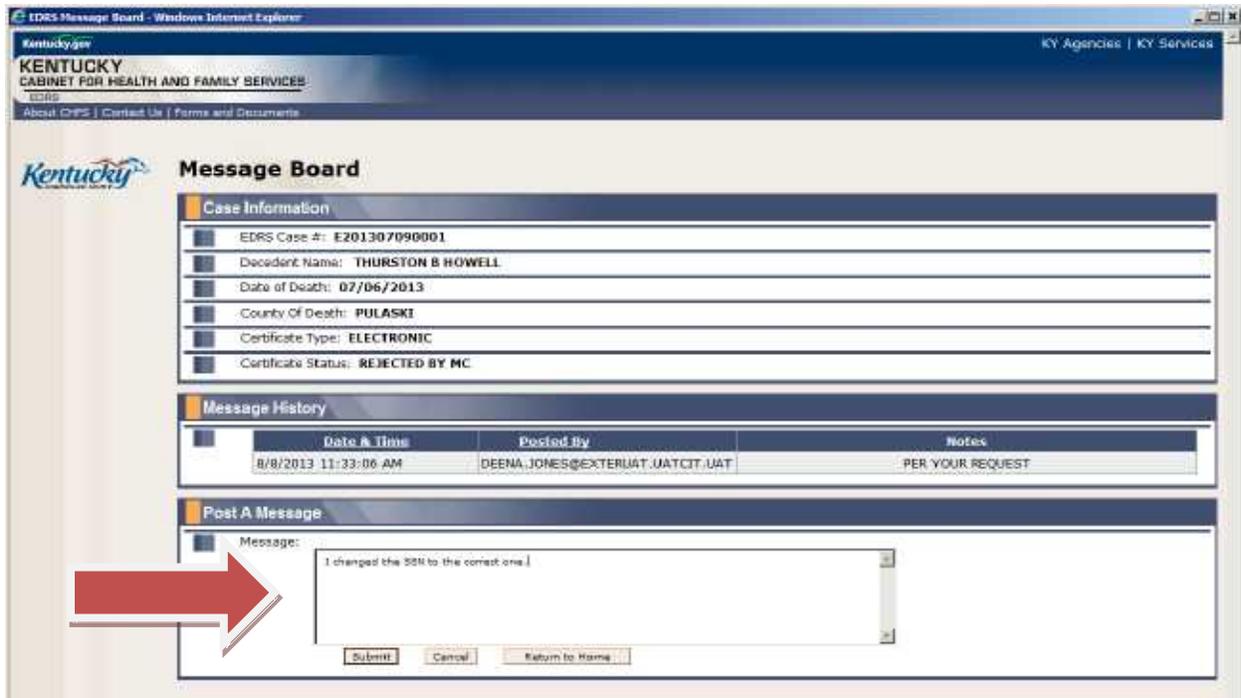
RECORD IS REJECTED BY MEDICAL CERTIFIER

There may be instances when a medical certifier rejects a record. The certifier may detect an erroneous entry on the record, or the record may have been assigned to the wrong medical certifier. In these instances, the record will show on the funeral director's active cases list with "Rejected by MC" in the status column. Any notes the medical certifier added may be viewed by clicking on the "Post/View Messages" column of the associated record.

The funeral director will receive an email notification of the status change if the appropriate selection has been made in the "Email Notification Options" (Please refer to Page 42 of this guide for further information on Email Notification Options.) It is recommended that you receive email notifications for all activity….this will enable you to have real-time knowledge of every progressing step for each case.

RECORD IS REJECTED BY THE OFFICE OF VITAL STATISTICS

There may be instances when the OVS detects an erroneous entry and rejects the record. In these instances, the record will show on the funeral director's active cases list with "Rejected by OVS" in the status column.

Select the record from the active cases list and the screen below will be shown. Rejected items will be listed, including the reason for rejection. After review of this information, click the **Next** button to go to

the appropriate screen. The rejected item will be highlighted. Correct the item, and resubmit the record to OVS.

The funeral director will receive an email notification of the status change if the appropriate selection has been made in the "Email Notification Options".   (Please refer to the section below for further information on Email Notification Options.) It is recommended that you receive email notifications for all activity….this will enable you to have real-time knowledge of every progressing step for each case.

EMAIL NOTIFICATION OPTIONS

The KY-EDRS can automatically generate emails to users whenever the status of a case changes. Users have the ability to manage what types of notifications they would like to receive. Select Email Notification Options from the left menu bar to customize your preferences.

> **YOU MUST SET YOUR EMAIL NOTIFICATION PREFERENCES ON THIS SCREEN TO RECEIVE EMAIL NOTIFICATIONS. IF YOU DO NOT SET YOUR PREFERENCES, YOU WILL NOT RECEIVE EMAIL NOTIFICATIONS.**

You have the option of providing two email addresses to be used for notification. It is recommended that you receive email notifications for all activity….this will enable you to have real-time knowledge of every progressing step for each case.

Select your preferences from the list provided and click the **Save** button after making your selections.

NOTE: If you have access to more than one role (Funeral Director and Coroner, for example) you should select your email options for each role. The options do not have to be the same for each of your roles.

<div style="border:1px solid black; text-align:center; color:red; font-weight:bold;">
IT IS IMPORTANT TO CHECK YOUR EMAIL MESSAGES DAILY TO PREVENT DELAYS IN PROCESSING DEATH CERTIFICATES!
</div>

CHANGING FROM ONE FACILITY OR ROLE TO ANOTHER

You may have requested and been granted access to more than one facility, or more than one role. For instance, some funeral directors also serve as coroners, or a funeral director assistant may prepare records for more than one funeral home location. It is not necessary to logout and login again to switch from one role or location to another. Simply click the **Change Facility** button on the left menu bar. You will then be taken to the Select Facility Screen, where you can make the appropriate selection.

EXPORT DATA

Funeral homes that utilize management software packages have the ability to export data from the KY-EDRS to the software package, eliminating the need for duplicate entry of records. Select "Export Data" from the left menu bar to utilize this functionality.

Enter the date range of data you wish to export, and then click the **Export Data** button. You will receive the following message:
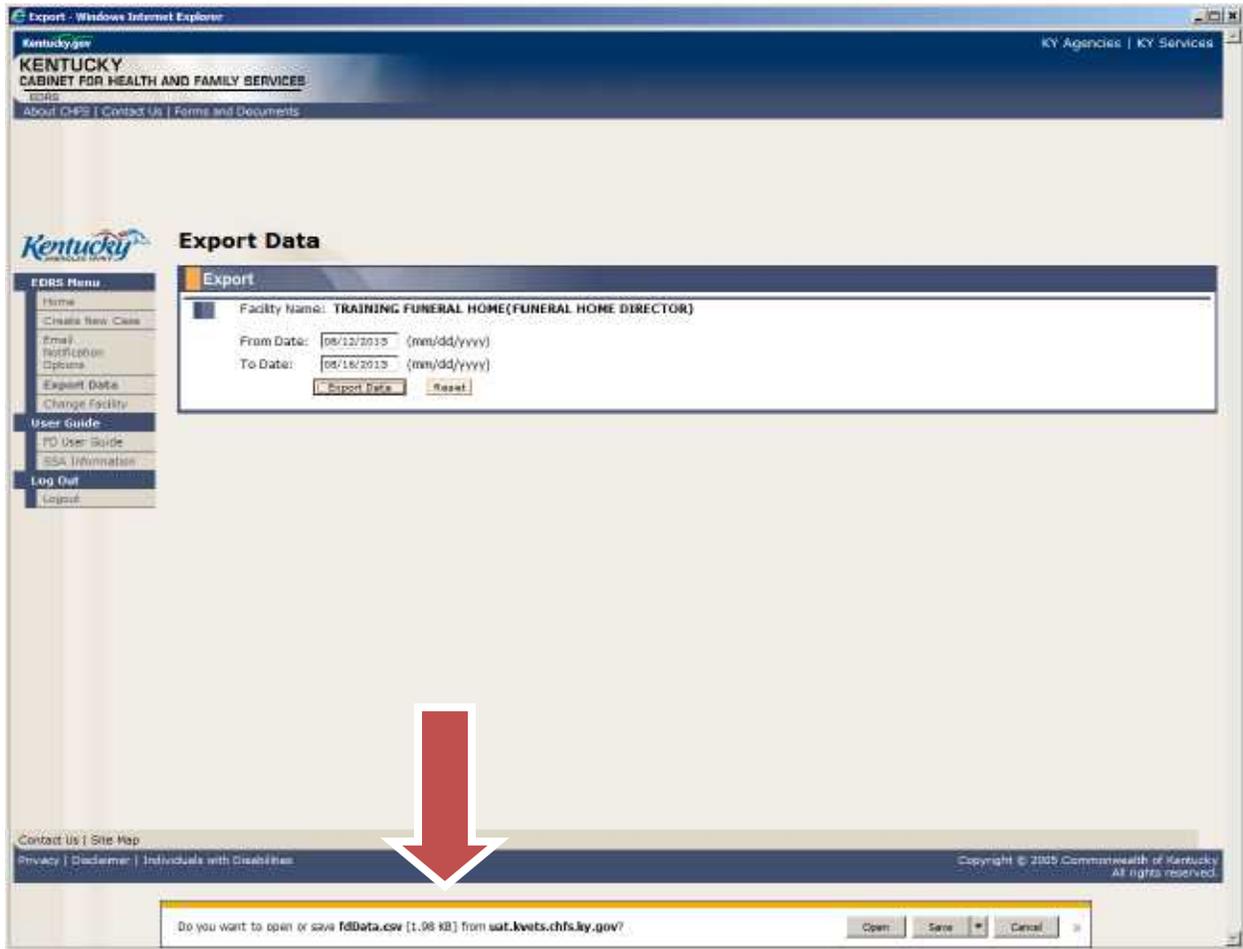
You can now choose to Open the file or Save it to your computer.   Please contact your software package representative if assistance is needed in importing the file into your software package.

FUNERAL DIRECTOR ASSISTANT ROLE

A funeral director assistant must submit a record to the funeral director for final review and submission to the medical certifier or drop-to-paper. After selecting a medical certifier or selecting drop-to-paper, the funeral director assistant will see the screen shown below.

After selecting the funeral director from the drop-down list, check the box by "I accept that the above information is correct.", and then click the **Submit to Funeral Director** button.   The following screen will then be displayed.
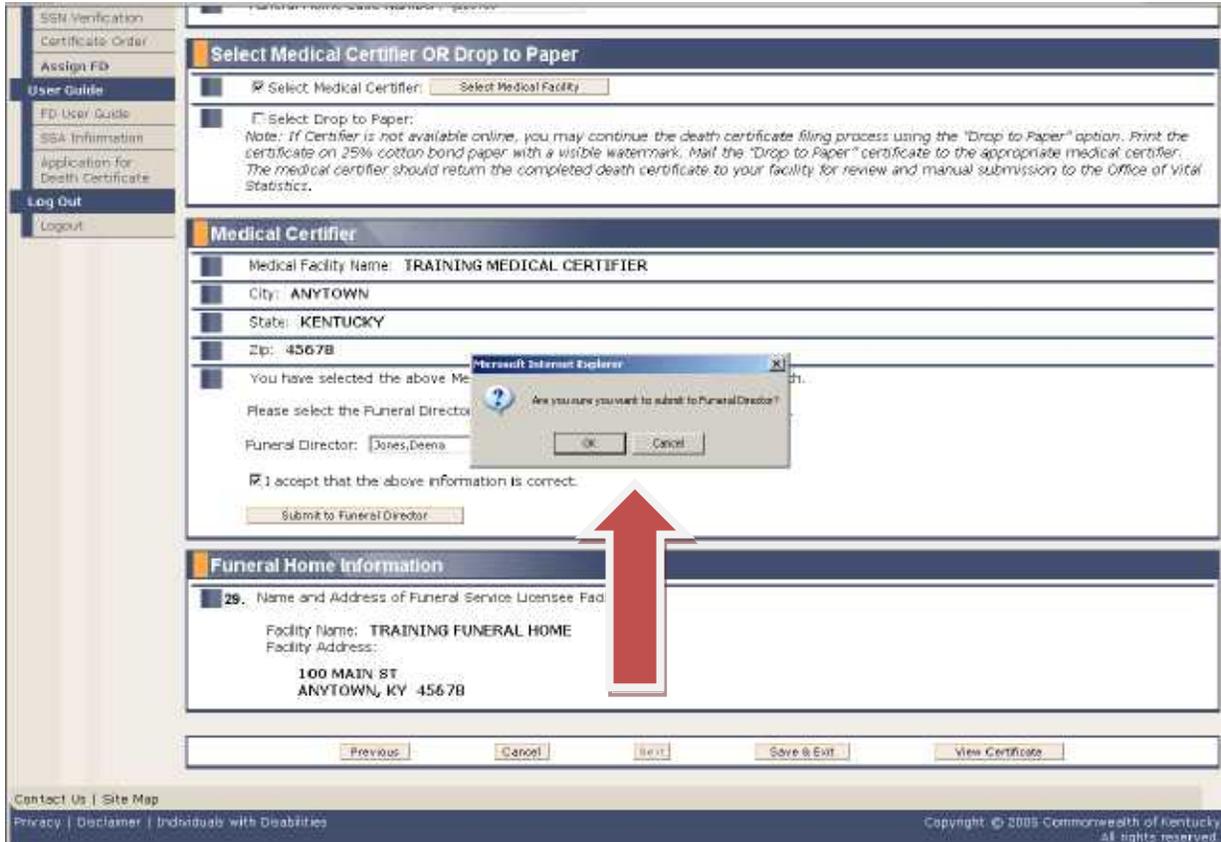
The funeral director assistant has the option to click the **OK** button to submit to the funeral director, or click the **Cancel** button to make changes to the record.

The funeral director may then review the record, edit if necessary, and submit it to the medical certifier.

Please note that the funeral director assistant cannot print the "drop-to-paper" certificate. The funeral director assistant must submit the record to the funeral director, who can review the record and then print the "drop-to-paper" certificate.

REGISTRATION

The KY-EDRS web application utilizes the Kentucky Online Gateway (KOG) as its authentication and security portal. Future applications to be used by the citizens of the Commonwealth will also fall under the KOG umbrella and will be added to this user group. To obtain access to the KY-EDRS, you must first register as a KOG user. This is a one-time registration process and **EACH USER MUST HAVE A UNIQUE EMAIL ADDRESS.**

Set Up an Account

Go to URL https://kog.chfs.ky.gov/home/default.aspx **(for LIVE-DATA "PRODUCTION")**.

Click **Create an Account**.

Complete the fields on the **User Profile Form.** Required fields are marked with an asterisk (*****).

Keep in mind that the Username you choose is the name that will be shown in the KY-EDRS history whenever you create, edit or submit a record.

Select two security questions from the drop down box, and enter the answer to each question.

Click the **Submit** button.

The confirmation screen shown below will be displayed.
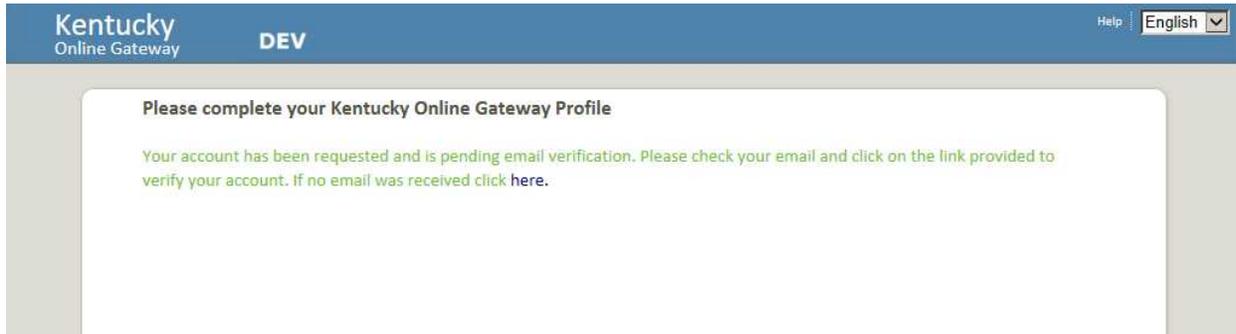
An email will immediately be sent to the email address shown on the User Profile form. Click the link shown in the email. **YOU MUST CLICK ON THE LINK SHOWN ON THE EMAIL WITHIN FOUR HOURS, OR YOUR ACCOUNT WILL BE DELETED.**
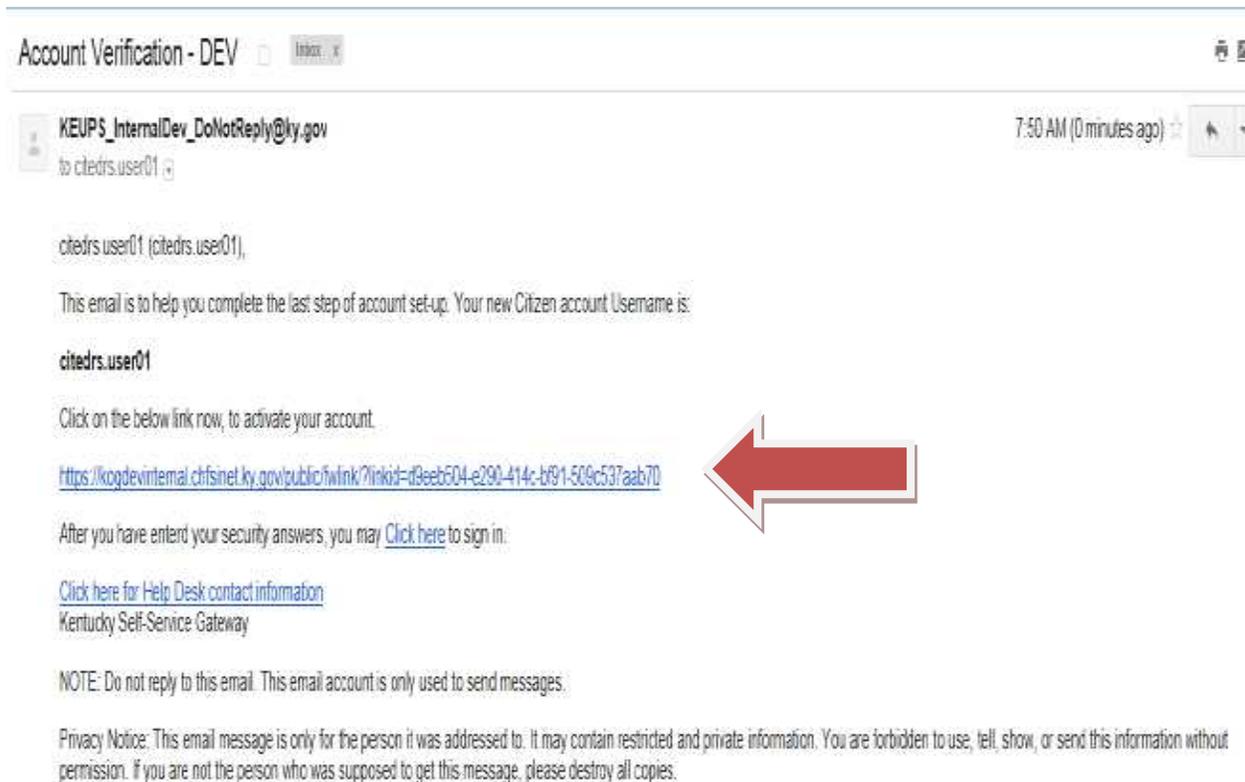
The screen shown below will be displayed. Enter the answers to the two security questions, **exactly as the answers were entered on the User Profile Form,** and then click the **Verify Account** button.

The screen shown below will be displayed.

**Congratulations! You are now a registered KEUPS user!!**

Access to KY-EDRS

The next step is to request access to specific roles and facilities in the KY-EDRS. Click the **click here to access KOG** button (as shown above), and you will be taken to the KOG login screen shown below.

Click the **Sign In** button

The screen shown below will be displayed. Enter your username and password, and then click the **Log In** button.

The screen shown below will be displayed. Click the **Request** button.
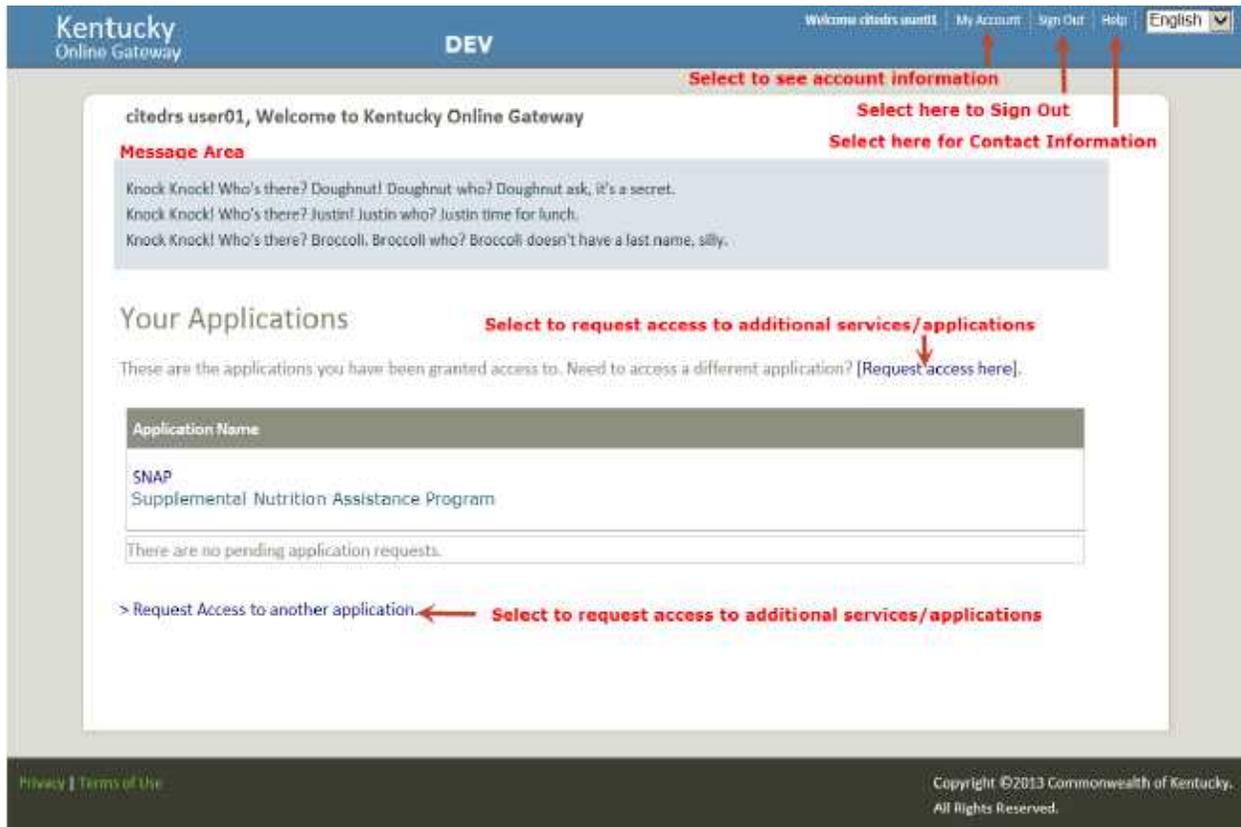
The screen shown below will be displayed. Click the arrow to open the drop-down list.

Select **EDRS** from the drop-down list, and then click the **Next** button.

The following screen will be displayed. Select the facility type from the drop-down box (County Coroner, Medical Certifier or Funeral Home).

Enter the Facility Name and Click **Search**.

The roles available for that facility will be listed as shown below. Select FD for Funeral Director or FDA for Funeral Director Assistant. Select AA for Administrative Approver role. **PLEASE REFER TO PAGE 58 OF THIS GUIDE FOR MORE DETAILS ON THE ADMINISTRATIVE APPROVER ROLE.**

Click the boxes for the appropriate role(s) for that facility, and then click the **Next** button.

The screen shown below allows entry of required credentials (license number, certificate number, etc), and the expiration date of the credential. Also, enter the **exact text as you would like your signature to appear on the death certificate**. Then click the **Next** button.

A screen will be displayed to review the roles you have requested, the credentials you have supplied, and the text for your signature. Click the **Previous** button to make any necessary changes. If no changes are required, click the **Submit Request** button.

After clicking the **Submit Request** button the following screen will be displayed. If you are registering for an assistant role, the Administrative Approver at your facility must first approve the request. The Office of Vital Statistics staff will then review the request, and you will receive an email when your request has been approved, or you will be notified of any reason for denial.

Administrative Approver Role

Each facility requires at least one Administrative Approver, and two administrative approvers may be named. This person will approve any requests for Funeral Director **Assistant** role for that facility. Generally, a funeral director will act as the Administrative Approver for a facility. However, a funeral director may delegate this role to an assistant. To designate an assistant to an Administrative Approver role, complete the Administrative Approver User Profile Form shown on the last two pages of this user guide, and mail to the Office of Vital Statistics at the address shown on the form. After allowing time for the mailed form to reach the Office of Vital Statistics, the assistant should also register for the AA (Administrative Approver) role in the KY-EDRS, following the steps shown above. Upon receipt of the electronic request, the Office of Vital Statistics will check to ensure that a properly completed and authorized paper form has been received. If so, approval will be granted to the assistant for the Administrative Approver role, and the assistant will be notified by email of the approval.

Processing Requests as an Administrative Approver

If you are the administrative approver for your facility, it is your responsibility to approve any requests for Funeral Director Assistant. Login using your username and password. Select **Request** from the screen shown below.

A screen showing requests pending your approval will be shown.

Click **View Details.**

The screen shown below provides additional details for the access request. You may now click **Approve** or **Deny** to approve or deny the access request from this user.

The Office of Vital Statistics will review the request and grant final approval. The new user will receive an email notification of the approval status.

CABINET FOR HEALTH AND FAMILY SERVICES (CHFS)
OFFICE OF VITAL STATISTICS (OVS)
KENTUCKY-ELECTRONIC DEATH REGISTRATION (KY-EDRS)

This form must be completed in order to allow an assistant having a need to access the Office of Vital Statistics Kentucky-Electronic Death Registration System, via secure portal access, as a subsidiary Admin Approver. It must be completed in ink or typed, all information must be accurate and complete, and the form must contain the appropriate authorized signature. *When the form is completed, it MUST BE SENT for verification and approval to the appropriate authorities.*

SECTION 1: FUNERAL DIRECTOR, MEDICAL CERTIFIER OR CORONER INFORMATION

FULL NAME: _____ **REQUEST DATE:** _____

USERNAME: _____ **EMAIL:** _____

PRIMARY PHONE: (____)_____ **ALTERNATE PHONE:** (____)_____

FACILITY NAME: _____

FACILITY FEDERAL ID #: _____ **LICENSE #:** _____ **EXP:** _____

JOB TITLE/FUNCTION:_____

BUSINESS MAILING ADDRESS:_____

CITY: _____ **ZIP:** _____ **COUNTY:** _____

SECTION 2: AUTHORIZATION SIGNATURE

As an authorized Admin Approver within the KY-EDRS, I am submitting this request to delegate and authorize the individual listed in Section 3 to be an Admin Approver, as a subsidiary to the access granted to me as an authorized Admin Approver.

AUTHORIZED USER SIGNATURE: _____ **DATE:** _____
Print Name *(must be legible)***:** _____

SECTION 3: ASSISTANT INFORMATION

FULL NAME: _____ **USERNAME:** _____

EMAIL: _____

JOB TITLE/FUNCTION: _____

SECTION 4: ASSISTANT USER SIGNATURE

I attest to the best of my knowledge that the information provided above is true, accurate, and complete.

USER SIGNATURE: _____ **DATE:** _____

FOR OFFICE OF VITAL STATISTICS ONLY

OVS ADMINISTRATOR:_____ **DATE:** _____

Print Name *(must be legible)***:** _____

Date Request Received: _____ Date Issued/Notified: _____

Deletion Date: _____

Reason (circle one):   Non-use   Resigned   Retired Dismissed   Other _____

CHECKLIST FOR COMPLETING THE AUTHORIZATION REQUEST FOR THE KENTUCKY-ELECTRONIC DEATH REGISTRATION SYSTEM (KY-EDRS)

_____ **Section 1:** FUNERAL DIRECTOR, MEDICAL CERTIFIER OR CORONER INFO

ALL fields must be completed. *Handwritten information must be legible.* Access will not be granted if this section is incomplete, and the form will be returned.

_____ **Section 2:** AUTHORIZATION SIGNATURE

Signature must be original. We will not permit anyone to sign for another person; the authorization signature must be from that person. Clear signatures must be provided. *Access will not be granted if signature is missing or name is illegible, and the form will be returned.*

_____ **Section 3:** ASSISTANT INFORMATION

ALL fields must be completed. *Handwritten information must be legible.* Access will not be granted if this section is incomplete, and the form will be returned.

_____ **Section 4:** ASSISTANT USER SIGNATURE

Signature must be original. We will not permit anyone to sign for another person; the user signature must be from that person. Clear signatures must be provided. *Access will not be granted if signature is missing or name is illegible, and the form will be returned.*

ADMIN APPROVER USER PROFILE FORM MAILING INSTRUCTIONS

Once the 'Admin Approver' has been completed and signed by all required parties, please mail the form containing the original signatures to:

Office of Vital Statistics
Administration & Quality Assurance Section
275 East Main Street 1E-A
Frankfort, KY 40621