

## Access EDRS

1. Log in to HCS at [https://commerce.health.state.ny.us/public/hcs\\_login.html](https://commerce.health.state.ny.us/public/hcs_login.html)
2. Enter your **User ID** and **Password**, then click **Sign In**.
3. Click on **EDRS** from your application list.
4. Click on your office (for the case you are entering, if affiliated with more than one office).

## Locate a Case You Own

Use this feature to find cases you started in EDRS or have been assigned to you by another party in the process.

1. Select **Life Events > Death > Locate Case** from the menu bar.
2. Enter decedent information. (Must match data entry exactly)
3. Click **Search**.
4. Click on decedent's name to access the existing case.

## Start/Edit New Case

Done any time before signing certificate.

1. Click the **Death Start/Edit New Case** button or select **Life Events > Death > Start/Edit New Case** from the menu bar.
2. Enter the required information for **First name**, **Last name**, **Date of Death**, and **Sex**.
3. Click **Search**.
4. If no record appears, click **Start New Case**.
5. If a record appears, click on decedent's name to access the existing case.

## Enter Death Certificate Information

1. Complete and validate each screen under the *Personal Information* section.
2. Enter known *Place of Death* information under the *Medical Certification* section, if not already completed by the medical certifier.
3. Notify medical personnel to complete and certify the *Medical Certification* section, if necessary.
4. Once all information is entered, click on the *Sign* page now appearing in the *Personal Information* section.
5. Read the **Affirmation** statement and click on the checkbox.
6. Click **Affirm**.



## Making Corrections After Signing, Before Registered

Corrections can be made any time before a case you own is registered and if you have not dropped to paper.

1. Access the case in EDRS using either the **Locate Case** button or **Life Events > Death > Locate Case** from the menu bar.
2. Go to the *Sign* page and click **Unsign**.
3. Click **OK** in the confirmation message pop-up box.
4. Make necessary changes and click **Validate Page**.
5. Go to the *Sign* page, then read the **Affirmation** statement and click on the checkbox.
6. Click **Affirm**.

### Validation and Stoplight Rules

You have the option to validate each page after entering fact-of-death information. The system will check for errors. Carets appear to the left of each page in the *Death Registration Menu* (left navigation bar).

▶ **Red Caret:** Information is still needed on this page; it is incomplete.

▶ **Yellow Caret:** Information is complete on this page, however some field entries were overridden. This may happen if information is not known at the time of data entry or the data entered is accurate but conflicts with EDRS system rules.

▶ **Green Caret:** Information is complete and acceptable for this page.

Make appropriate edits or necessary overrides and repeat page validation. All carets must be green or yellow to sign the certificate.

## Request Medical Certification

In a case where the medical certification has not been completed, you can request certification from a specific medical certifier and facility.

1. Access the case in EDRS using either the **Locate Case** button or **Life Events > Death > Locate Case** from the menu bar.
2. Click **Request Medical Certification** from the left navigation bar.
3. Select the **Certifier Name** and **Facility/Office Name** using the Lookup tool (magnifying glass icon). (Must match data entry exactly)
4. Add any notations to the message and click **Save**.

## Request Amendments/Corrections

Corrections needed after a case you own is registered require an amendment.

1. Access the case in EDRS using either the **Locate Case** button or **Life Events > Death > Locate Case** from the menu bar.
  2. Click **Amendments** under **Other Links** in the left navigation bar.
  3. Select the amendment **Type** from the dropdown list.
  4. Click **Save**.
  5. Select the **Page to Amend** from the dropdown list.
  6. Make the change(s) to the selected page.
  7. Click **Validate Amendment** then **Save**.
  8. Once amendments are saved, click on the **Amendment Affirmation** link on the **Amendments** menu.
  9. Read the **Amendment Affirmation** statement and click the checkbox.
  10. Click **Affirm**.
  11. Repeat steps 3-7 as necessary for each page.
- The amendment will be finalized and approved and then appear on the case.

## View Your Queue Summary

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

1. Click the **Registration Work Queue Summary** button or select **Queues > Registration Work Queue Summary** from the menu bar.
2. From the summary page, click on the **Queue Name** (category) for which you would like to see your cases.
3. Click on the **Decedent Name** on which you are working. Alternately, you can check the box to the left of the desired case and select an action below the list, such as **Add Comments**.

## Process a Trade Call

Trade calls can be established as long as the case is not signed. If already signed, you must unsign.

1. Access the case in EDRS.
2. Click **Trade Call** in the **Other Links** section of the left navigation bar.
3. Use the Lookup tool (magnifying glass icon) to locate the funeral firm whom you are working with on the case.
4. Click **Save**.

### Things to Remember

If you are affiliated with more than one Funeral Home, make sure you select the appropriate office when accessing EDRS.

You cannot make changes to, relinquish, transfer, or process a trade call on a case if you have already signed the case. You have to 'unsign' the case to perform any of these.

Once you start a case, it cannot be deleted.

You can override some data entry rules, but it is not suggested.

*Drop to Paper* is a last resort!

## Transfer a Case

If you need to transfer a case you started to another funeral director or medical professional,

1. Access the case in EDRS.
2. Click **Transfer Case** in the **Other Links** section of the left navigation bar.
3. Check the **Transfer Personal Ownership To:** box.
4. Click the eraser (pencil icon) to clear your firm as owner.
5. Use the Lookup tool (magnifying glass icon) to locate the new owner of the case.
6. Add any notations to the message and click **Save**.

## Relinquish a Case

1. Access the case in EDRS.
2. Click **Relinquish Case** in the **Other Links** section of the left navigation bar.
3. In the **Relinquish Case** pop-up box, click **OK**.

**Note:** If you relinquish a case, you will no longer be able to access this case.

## Print Forms

- **Burial Permit:** Can be printed after event is registered.
- **Drop to Paper:** Converts certificate completion to paper version. Case cannot be completed electronically once this is selected.
- **Working Copy:** Can be used to review case as Death Certificate format.