Coroner User Guide

VERS

VERS

Coroner User Guide

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Contents

Chapter 1 introduces you to VERS.

Chapter 2 presents information about different browsers that you may use, as well as when and how to request technical support.

Chapter 3 introduces you to the VERS dashboard.

Chapter 4 guides you through updating and saving records, certifying records, assigning/transferring and declining cases, removing (cancelling) unfinished records, and creating/submitting amendments.

Chapter 5 provides guidelines for searching for one of your records.

Chapter 6 explains how to print.

Chapter

1

VERS:

Getting Started

VERS

1 Introducing VERS

In this chapter

Regardless of whether you work with birth records, death records, marriage records, divorce records, ITOP records or customer orders there are **VERS** features that you will all see and use. This chapter explains what to expect when you start working in the **VERS** application and how to open the application.

Because the **VERS** system includes many modules (i.e., birth, death, etc.) this chapter may include references to and screen shots from multiple modules to best demonstrate application features. Specifically, this chapter contains the following topics:

About VERS security

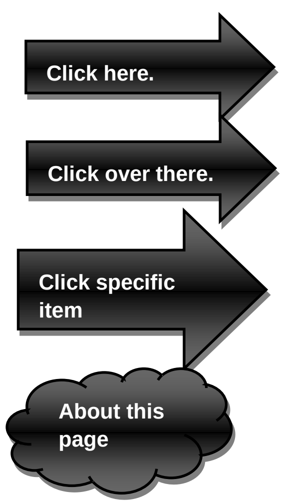
As you know, vital event records store important information. Because of this it is important that this information be protected. Protection begins each time you log in to the application. The logon procedure is designed to prevent unauthorized entry by others, as well as provide a way for you to recognize that the web site (**VERS**) that you have launched is indeed the real **VERS** site.

Important: The security of any system depends on its built-in security features and the actions and reactions of its users. If you suspect unauthorized or inappropriate use of **VERS**, you should report it to the help desk.

About this user guide

This user guide is organized into chapters to provide information and instruction regarding **VERS** functionality that you may need to do your vital records work. Procedures in this guide are presented as numbered steps. They tell you how to open the page or record you need to complete a task. They assume that if you are filling in a form, you are starting from the first field of the first page and going to the last field on the last page. If this is not the case, you can move through the pages in any order. Either way, it is likely that you will not need these instructions very often.

Figures used in this guide generally only include the first page of the record. To provide supplemental information about these figures the following symbols are used:



This arrow shows where to click on the near side of the figure.

This dashed arrow shows where to click on the far side of the figure.

This box arrow points out a list from which you should make a selection.

This cloud provides information beyond the information that is provided in the figure's caption.

This cloud provides information beyond the information that is provided in the figure's caption.

Tips: It is good practice to always log out before leaving your work area, even if only for a moment!

If you are entering a record, you must return to the **VERS** Dashboard to access the **Logout** option after saving the record.

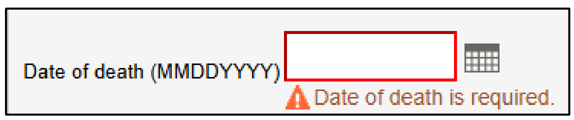
Security Alerts! After you logout, you should completely exit by closing all open browser windows.

If you do not log out, **VERS** may "time out." Please refer to "System inactivity limits" on page 1-11 for more information about this feature.

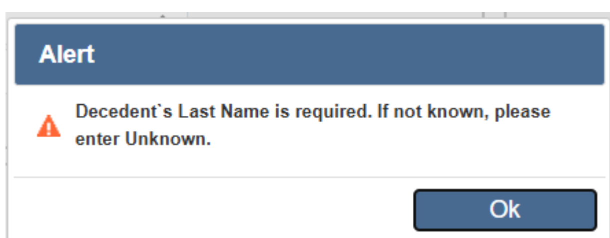
Application conventions

To make it easier for you to enter information, the **VERS** application provides a variety of features that are used consistently throughout the application. These features include:

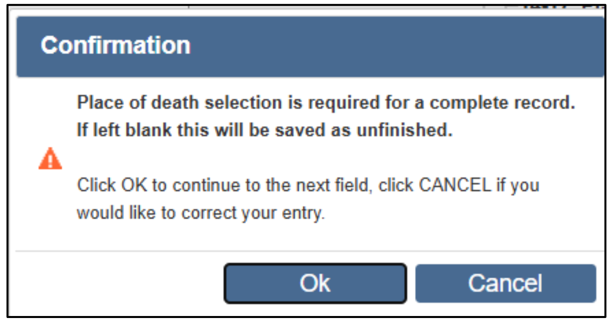
- **Required information**: Some information may be a mandatory requirement before you can continue to another field or process a transaction.
- **Protected information**: Field values that you are not able to modify appear in grey text.
- **Auto-populated information**: The application automatically populates some fields based on data you entered or selected in a previous field.
- **Application Messages**: The **VERS** application uses many messages to help guide you through your data entry. These messages may appear at the top of a data-entry record or in a separate window. For examples:
    - ♦ Some rules do not fire until you try to go to another page. Messages for these rules appear below the field.



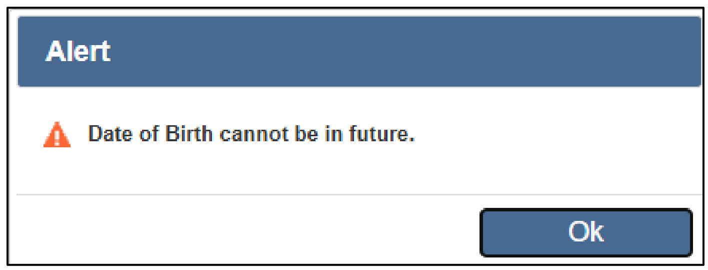
    - ♦ Some fields are required; that is, you must enter information in these fields before you can move to another field or save the record. If you try to skip these fields, messages will alert you to the problem. The following shows this type of message. Note that it has one button only—the **OK** button. You must click this button to return to the field where you must enter the requested information.



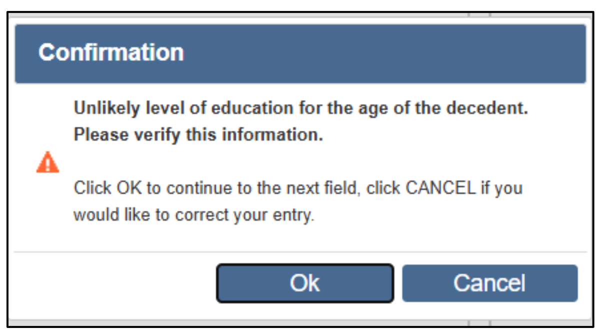
    - ♦ Some fields can be left blank during the data entry process, but information must be entered before the system recognizes the record as being complete. The following shows this type of message. Note that that this type of message has two buttons. Click **Cancel** to keep the curser in the field so that you can enter the information at this time or click **OK** to go to the next available field.



- Sometimes information you enter is an unacceptable entry, usually entered in error. In these cases, a message informs you that there is a problem. These messages have one button only—the **OK** button. You must click this button to return to the field where you must correct your entry.



- Sometimes information you enter is a questionable entry, which may have been entered in error. In these cases, a message informs you of the potential problem. This type of message has two buttons. Click **Cancel** to keep the curser in the field so that you can correct the information or click **OK** to go to the next available field.



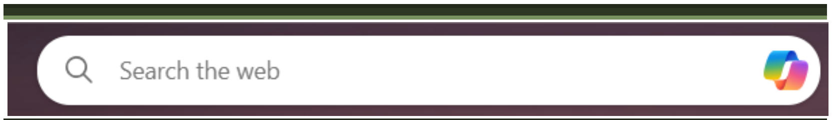
- **Tab Order**: As you enter information on any page, your cursor will move through the fields in a predetermined order. This order is called the tab order. You should use your **Tab** key to move forward through the fields and **Shift + Tab** to move backward. Using your **Tab** key is the recommended method of moving from field to field. This method allows for faster data entry than using a mouse to move the cursor.
- **Page Navigation**: You can enter data in order using the **Previous** and **Next** buttons or you can click on a tab to open pages in any order.

- **Cancel Button**: As with most applications, the **VERS** application has a **Cancel** button at the bottom of each page if you do not want to save your changes. Any previously saved information remains saved and unchanged in the database.

Launching VERS

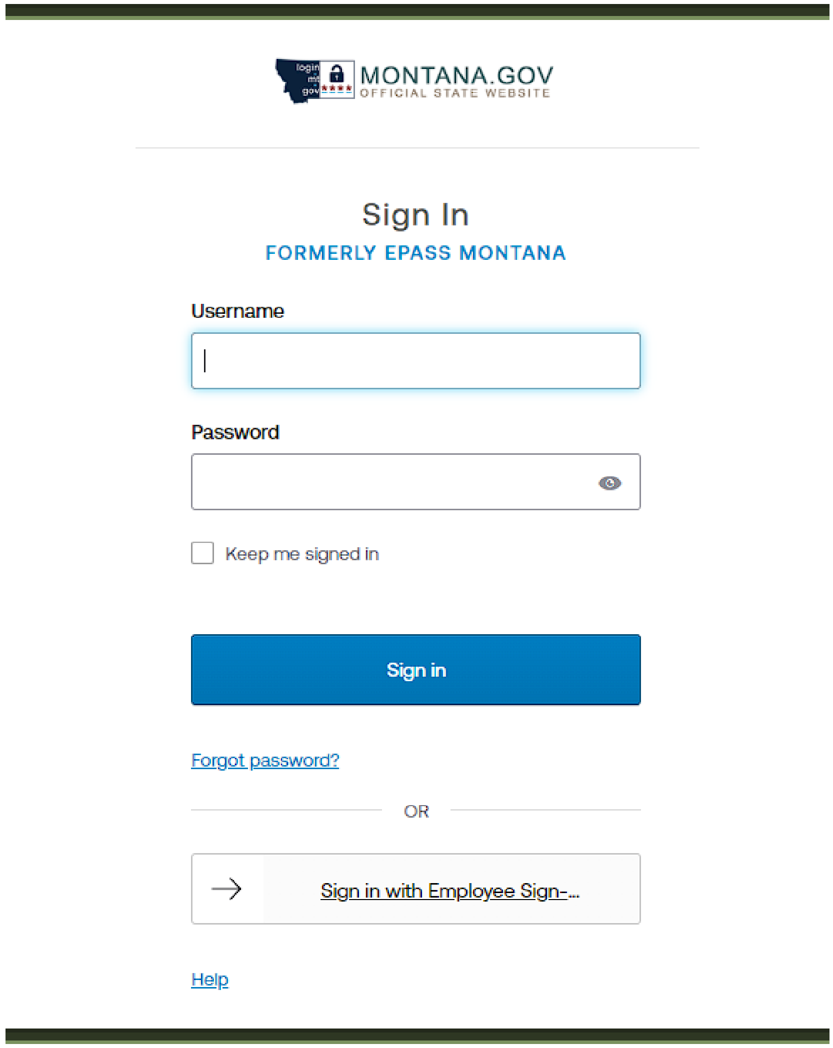
You will receive the URL and OKTA information when you set up your account information with the state. After your account is set up and you have entered the security information required by OKTA, you be able to open the VERS application. To do so:

Step 1 Enter the internet address (URL) that points to VERS.

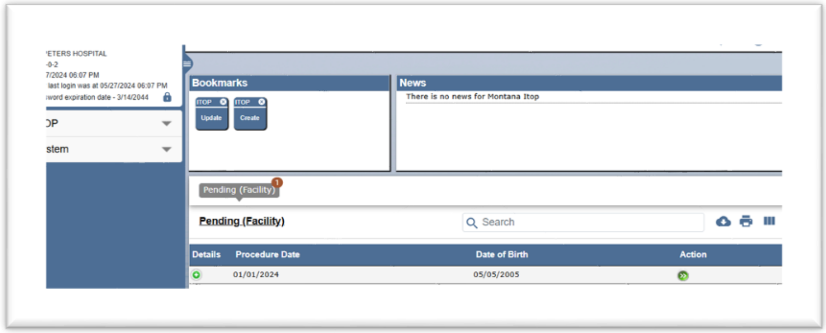


Tip: To avoid entering the URL each time you want to login, you can create and use a browser bookmark.

Step 2 Enter your username and password. Then click Sign in.



Step 3 When you sign in, the VERS Dashboard opens. See Chapter 3 VERS Dashboard to learn more.



Data entry pages

When adding or modifying cases in any of the **VERS** modules (e.g., Death) you will notice that each data entry record has multiple pages. Each page of the record contains multiple fields categorized into sections as shown in the following figure.

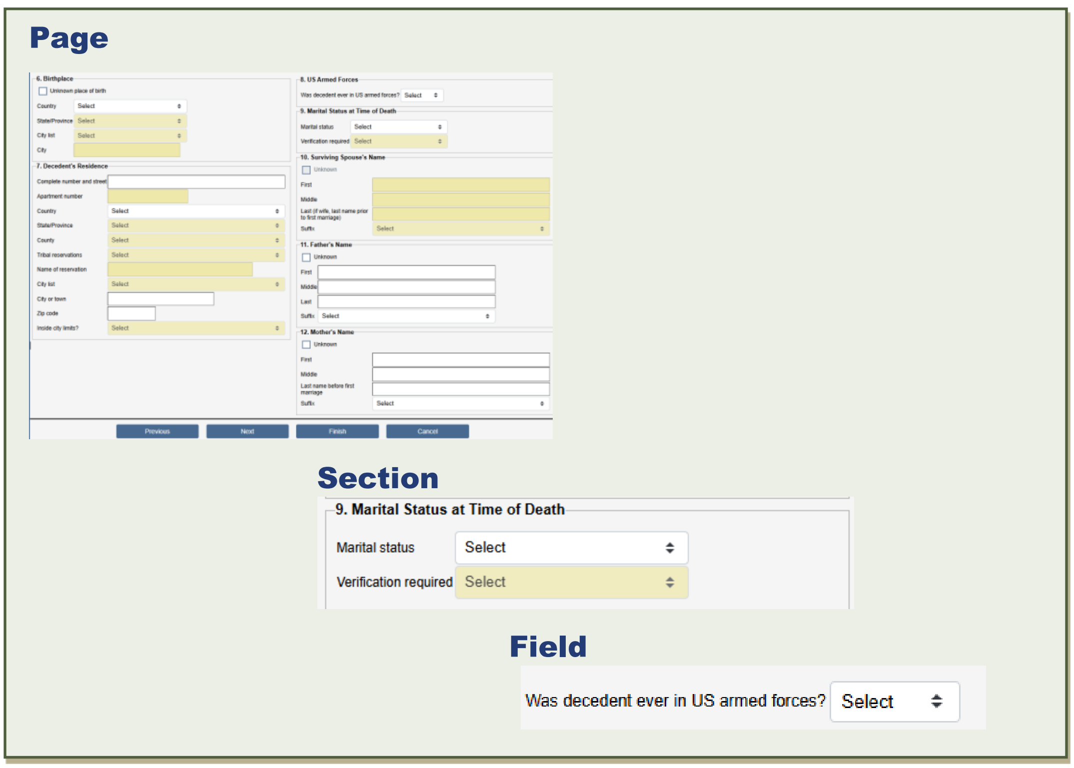


Figure 1-1 Page - Section - Field Relationships*: A record may contain multiple pages; each page may contain multiple sections; and each section may contain multiple fields.*

Page tips

Note the following when entering information in the **VERS** records:

- You can open a page by clicking the page's name in the left menu panel or by clicking the **Next** button to move forward through the pages or the **Previous** button to move back a page.
- If you do not see a page, it may be hidden. In some cases, a page only opens if the information requested on that page is pertinent to the record you are working on. For example, you may not see a page to enter AKA/aliases unless you have indicated that there are AKA/aliases associated with the record.
- You will be required to correct certain types of errors before you can continue.
- You will be reminded to enter information required for saving a complete case and what to enter if an actual value is unknown.
- The selections you make in drop-down lists (e.g., state) may determine what appears in subsequent drop-down lists (e.g., county).
- Remember to click the **Finish** button to save your work.

Keyboard Shortcuts

You can use your keyboard to make data entry faster. Below are some tips that you may or may not already know.

- Press your **Tab** key to move forward.
- Press your **Shift + Tab** keys to move back.
- Checkbox: Use your **spacebar** to select or deselect.
- Press your **Alt + T** keys to insert the current date (without having to type it in manually).
- Drop-down list: Begin typing your selection until the list jumps to that selection.
- Press your **Alt + N** keys to open the next page of the form.
- Press your **Alt + P** keys to open the previous page of the form.
- Press your **Alt + Page Up** keys to open the first page from any other page of the form.
- Press your **Alt + Page Down** keys to open the last page of the form from any other page of the form.
- Press your **Alt + ↓** keys to “open” a list box.
- Press your **Ctrl + F** keys to specify text you want to find on a page.

Help/Field definitions

If you are unsure as to what information goes in a particular field, position the cursor over the field label (e.g., First name) When you hold the cursor over the label, no clicking necessary, you will see hover text appear as to what type of information you should enter in that field.

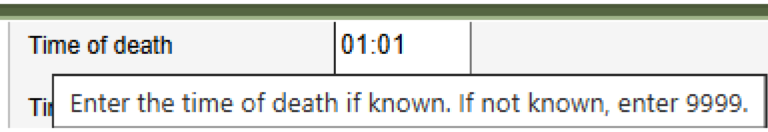


Figure 1-2 Sample Field Definition*: This shows the hover text or tool tips for a field. It appears when you move the mouse over the field label.*

Duplicate record alert

Whenever you start a record, the system performs a duplicate record check. The purpose of this is to identify record(s) that potentially match the one you are entering so that you are not duplicating your work effort and to avoid the need to cancel records. If no match is found, the full form opens so you can continue filling out the form.

If the system finds such a record, a potential duplicate record warning will be displayed.

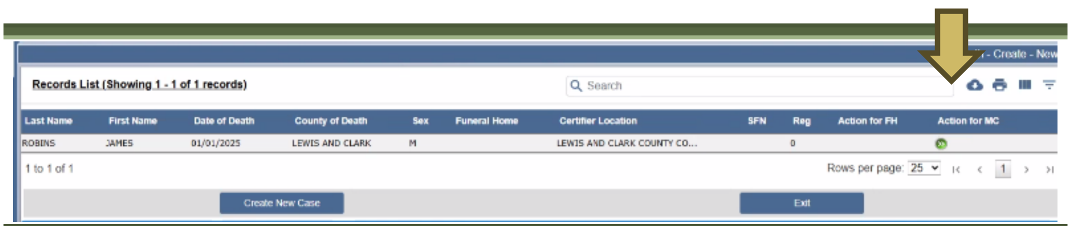


Figure 1-3 Sample Duplicate Information Warning*: This message informs you that the record you are entering may already exist. If it is already in the system, you do not need to re-enter it.*

Notice the Action for MC column. If the record listed is already one of your location's records, you can click the double arrow to open the record. Or if you know that it is not the same as the one you just started to create you can click **Create New Case**. If you are not sure if it is a duplicate, you can click **Exit** and investigate further to determine if you are trying to enter a duplicate record.

If the record shown does not belong to your location, you will not see a double arrow. The location that owns the record is shown in the Certifier Location column. If you know that it is not the same as the one you just started to create, you can click **Create New Case**. If you are not sure if it is a duplicate, you can click **Exit** and investigate further to determine if you are trying to enter a duplicate record.

Logging out

Before you get started you should know how to get out of the system once you are in it. You should always use the **Logout** option upper right-hand corner of the **VERS** Dashboard.

Note: Besides logging out to exit the application, you should always log out before leaving your work area, even if only for a moment!

Security Alert! After logging out, you should always close all open Internet Browser windows to completely exit the application.

System inactivity limits

If you are working in the **VERS** system and are not actively entering information or navigating the menu for an extended period, your session may be terminated. This feature is included for extra security in the event your **VERS** work is interrupted and you have not logged out of the system. If you have an open case, you will be notified before the application closes to give you the opportunity to continue work (Figure 1-4).

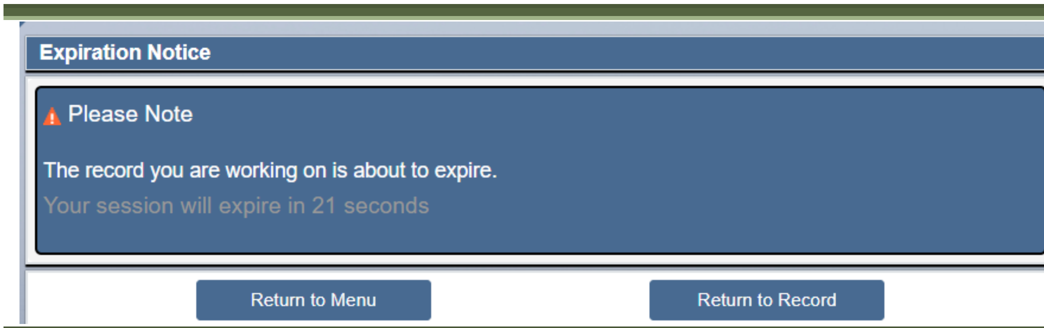


Figure 1-4 Sample VERS Expiration Notice*: This alerts you that you are about to be logged out of the system and allows you to continue your current task.*

If you notice the above **VERS** *Inactivity Timeout* message and want to continue working in the **VERS** application, click the **Return to Record** button. If you miss this opportunity, the application will close the open record automatically (Figure 1-5). If you miss this opportunity to keep the application open, you will have to log back in to resume work in the **VERS** system. Note that if this happens you may lose the information entered if you did not save it.

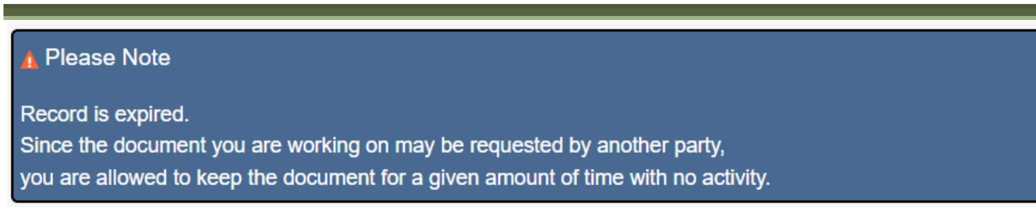


Figure 1-5 Sample VERS Inactivity Timeout Message: This alerts you that your session timed out.

Chapter

2

Technical Support

2 Technical Support

In this chapter

This chapter explains what to do if you encounter problems when using the **VERS** application. If you are still having problems after trying the recommended resolution, or if you are not comfortable implementing any of the recommended resolutions, you should refer to "About technical support for VERS" starting on page 2-5 or contact your **VERS** help desk at 406-444-9500.

Note: You should call the help desk (406-444-9500) if you need to reset your password (OKTA).

Specifically, this chapter contains the following topics.

Technical requirements

The **VERS** application is designed for viewing and use on a standard high-resolution color monitor with the screen display set to (at least) 800 X 600 pixels. Screen resolutions at less than 800 X 600 (for example, 600 X 480) will enlarge the pages, buttons and fields, but may make navigation through the application more difficult (more scrolling).

Higher resolutions are acceptable. Higher resolution will not change functionality and you will be able to view more information on some pages, but text and images will appear much smaller and may be difficult to read.

To run the **VERS** application and print your documents you need to have downloaded/installed an internet browser. The recommended browsers are Edge, Firefox and Chrome.

These browsers are available at no cost via the internet. If one of these browsers is not already installed, go to https://www.mozilla.org/en-US/firefox/new/, https://www.google.com/chrome/ or https://www.microsoft.com/en-us/edge and follow their instructions for downloading their product. Contact your helpdesk for further assistance

Prerequisites for browser configuration

If you experience problems with how VERS works in your browser, especially when printing, please check the items listed in this section. If you need more information about checking and/or changing browser settings, please contact your IT department or help desk. The following information is provided as a guideline: The way to make the suggested adjustment depends on your browser type and version.

Add application URL to browser trusted sites

Your VERS website's URL should be added to your browser's list of trusted sites. The way to set this up depends on your browser. Find your browser below and follow the steps for that browser.

Note: You may need to have your local IT department set the URL as a trusted site on the network.

Microsoft Edge

1) Search in the **Start Menu** for the **Control Panel**.
2) Click or double-click the **Internet Options** icon.
3) In the *Internet Properties* window, click the **Security** tab.
4) Select the **Trusted sites** entry and click the **Sites** button.
5) Enter the URL for your **VERS** website in the **Add this website to the zone** text field.
6) Click the **Add** button, then click **OK** to save the website addition.

Mozilla Firefox

1) Click the menu icon in the upper right-hand corner of the browser.
2) Click **Options**.
3) Click **Privacy and Security**.
4) Scroll down to the "**Permissions**" section and click on **Exceptions** to the right of "Warn you when websites try to install add-ons."
5) Type the URL for your **VERS** website into the "Address of website" field.
6) Click **Allow**.
7) Click **Save Changes**.

Google Chrome

1) Click the Chrome **Menu** icon on the far right of the **Address bar**.
2) Click on **Settings**, scroll to the bottom and click the **Show Advanced Settings** link.
3) Click on **Change proxy settings** (under **Network**)
4) Click the **Security** tab > **Trusted Sites** icon, then click **Sites**.
5) Type the URL for your **VERS** website, then click **Add**.
6) Click **Close** > **OK**.

Safari

1) At the top of the screen, click **Bookmarks**.
2) Click "**Add Bookmark**..."
3) Click "**Top Sites**" from the dropdown menu.
4) Click **Add**.
5) Type the URL for your **VERS** website, then click **Add**.

iPad

1) Go to Settings app on the iPad
2) Select **'SCREEN TIME'**
3) Select **'Content & Privacy Restrictions'**
4) Make sure **Content & Privacy Restrictions** is toggled (in Green), then select **Content Restrictions**.
5) Select **'Web Content'**
6) If your restrictions are set to “Limit Adult Content”, then click on the Add Websites button to enter the URL for your **VERS** website.

PDF opens in the same browser window

The documents you generate should open in a new window. If they do not, contact your local IT support group or call the Help desk.

About technical support for VERS

Your **VERS** help desk team can provide assistance in a variety of areas. You can help them help you by knowing when to ask for help and what information will help them help you.

When to request technical support

You may experience a situation where some part of the application is not doing what you want it to do or think it should do. This may be due to a configuration problem as explained in “Prerequisites for browser configuration” starting on page 2-3 or “PDF opens in the same browser window” on page 2-5. If not listed or if you still have problems, you should contact your local IT Support or your **VERS** help desk. Problems can fall into the following categories:

- Connectivity – These problems prevent you from accessing the **VERS**. Entry page or from successfully logging into the **VERS** system. You can check this by trying to access a different website. If you cannot access another website, then contact your Local IT. If the connection to **VERS** is lost, try pressing **F5** to refresh the page.
- Hardware – These would be problems with your computer, mouse, keyboard or printer. (Printing problems may also be application problems.) Please contact your Local IT.
- Application usage – These problems arise because you are uncertain how to use the application.
- Application problems or "bugs" – These problems are the ones where the application is not performing the way in which it should. For example, you can't save a record for which you have entered all required information.
- Database – These problems can result in unexpected Oracle (database) errors.

Note: Most Connectivity and Hardware problems will be the responsibility of your local IT Support, for other categories please contact your **VERS** help desk. Depending on the nature of your problem, it could be “fixed” immediately, or it may take a while to reproduce the problem, identify the cause, correct the problem, and release another version.

How to request VERS technical support

If you encounter a problem that requires technical support, you should contact your **VERS** help desk. If a support officer is not available or if you call outside of the regular business hours (9:00 to 5:00 Monday-Friday) you should leave a message. If this happens, leave your name and telephone number and a help desk team member will return your call as soon as possible.

What to expect from technical support

When you talk to a help desk team member, you may be asked a variety of questions concerning how to contact you and the nature of the problem. The more information you can provide in response to these questions, the easier it may be to determine the cause of the problem and, therefore, the way to correct the problem.

- Information about you:
    - Your name
    - Where you work
    - Your telephone number
    - Your job role (why you access **VERS**)
- System information
    - Browser name and version
    - Which **VERS** module/function you were using when the problem occurred
- Problem information
    - Describe the problem, giving as much detailed information as possible including the sequence of actions prior to the problem.
    - Are there any error messages?
    - Have you been able to complete the task successfully in the past?
    - Have you experienced this problem before?
    - Can you recreate the problem?

Chapter

3

VERS Dashboard

VERS

3 VERS Dashboard

In this chapter

This chapter provides an overview of the "look and feel" of the VERS dashboard. Note that the screen shots show what a funeral director sees; however, the processes described are the same regardless of your user role.

Dashboard (See Dashboard (Home Page) on page 3-3)

The VRVCloud dashboard has many features. This document shows answers to the following:

- Where are the menu options? See "Dashboard Navigation panel" on page 3-3.
- Do I always have to select a menu option? See "Add/remove bookmarks" on page 3-4.
- How can I access helpful information? See "Other actions" on page 3-4.
- How can I change my location if I am a multiple-location user? See "Other actions" on page 3-4.
- How do I log out? See "Logout" on page 3-5.
- Where is the news message panel? See "News" on page 3-5.
- What is the purpose of the icons in the queue panel, and how can I use them? "See Work Queues" on page 3-5.

Create New Record

- How do I start the process of creating a new record? See "Create a record" on page 3-9. Note: you will only see this option if you user role allows you to create records.

Update a Record

- How do I start the process of updating a record? See "Update a record" on page 3-10.

Search Results

- What is the purpose of the icons on the search results panel, and how can I use them? See "Search Results Page" on page 3-11 for a look at the search results page and See "Work Queues" on page 3-5 for information about icons and how to use them.

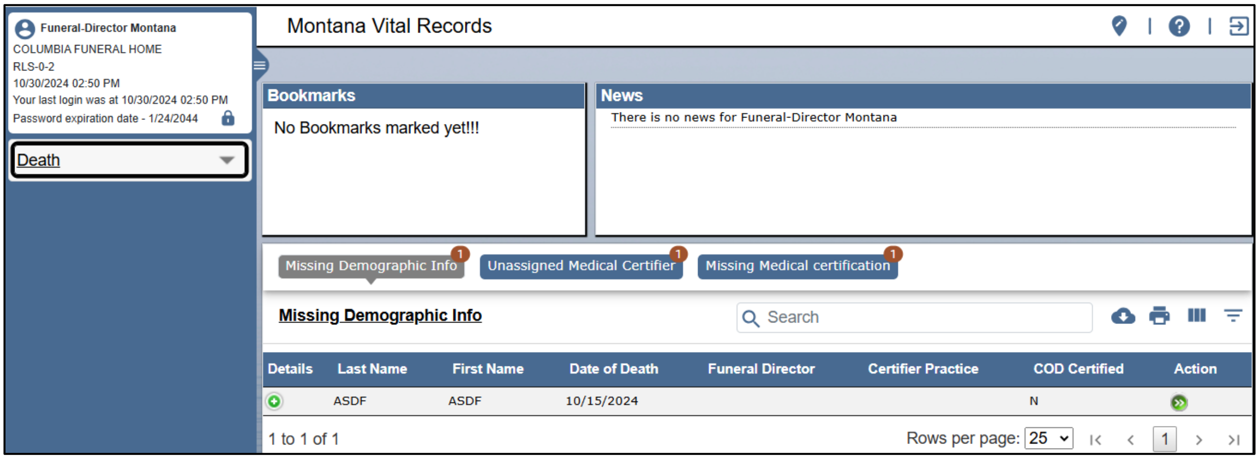
Record Data Entry Pages

See "Record data entry pages" on page 3-12 to see how you can return to the dashboard or logout.

See "Screen navigation panel" on page 3-13 for answers to the following.

- Can I see what sections are on a page without opening each page?
- Can I see what fields are in a section without opening the page?

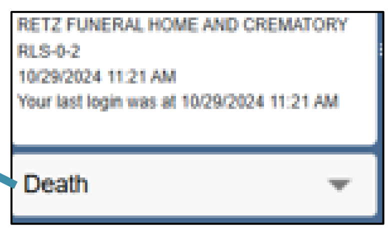
Dashboard (Home Page)



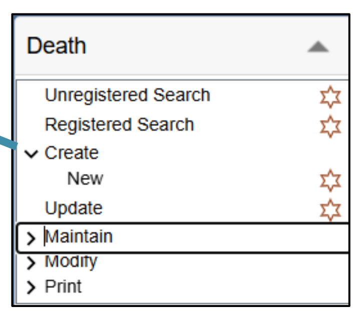
Dashboard Navigation panel

Expand/collapse the menu

Click items with arrows to expand and collapse the menu.

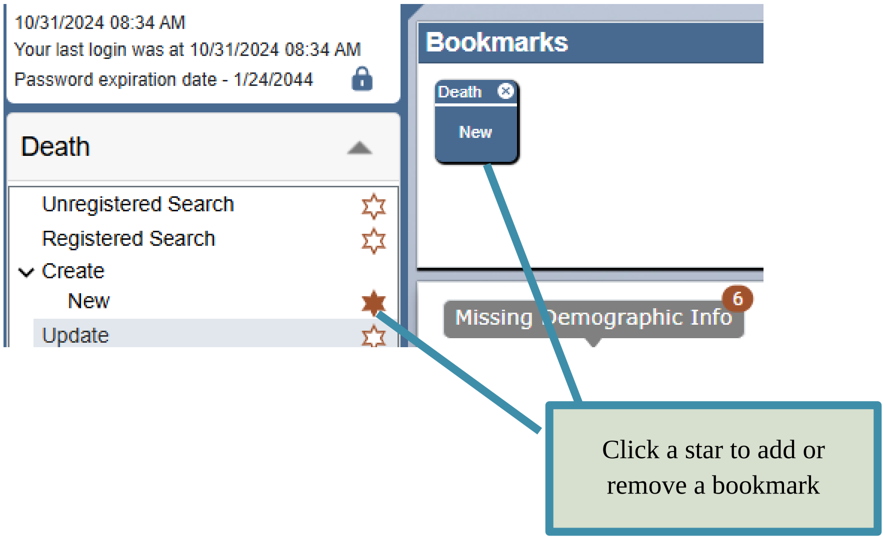


Click items with arrows to expand and collapse submenus.

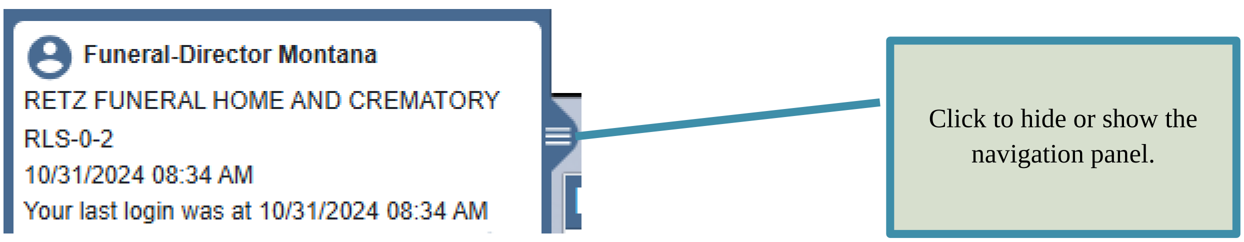


Add/remove bookmarks

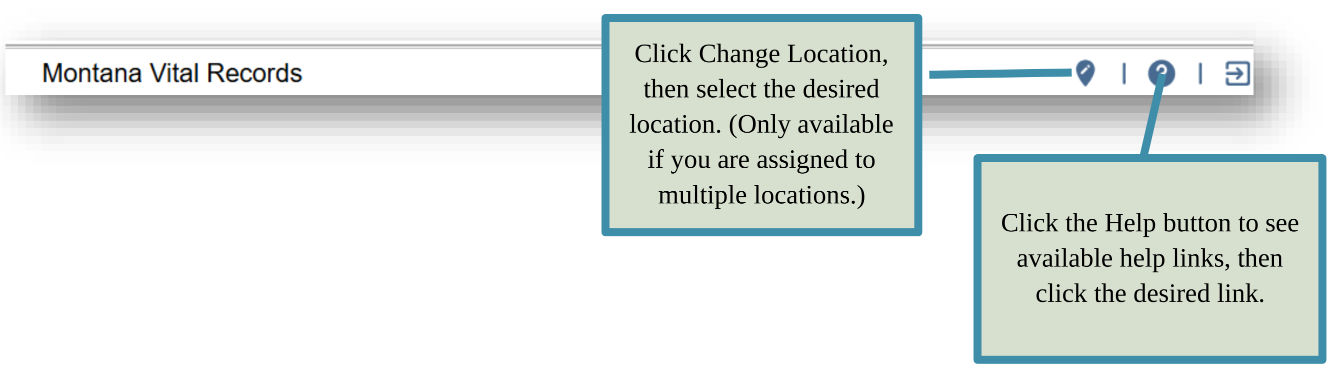
Bookmarks can be used instead of the navigational panel.



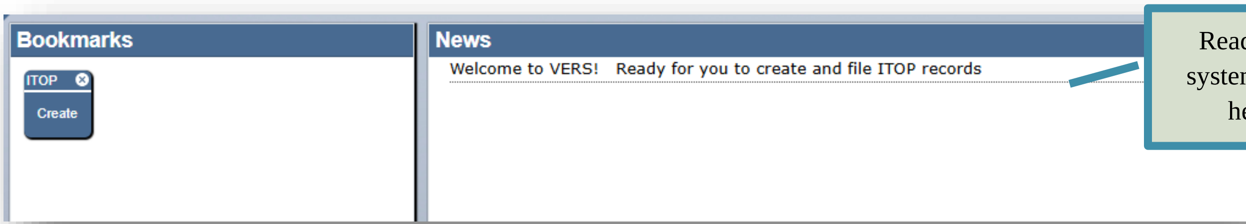
Hide/show navigation panel



Other actions



News



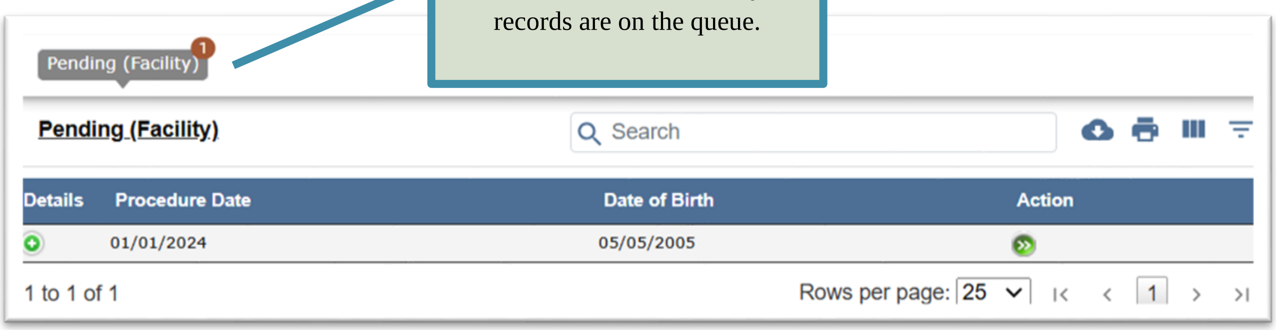
Read your system news here.

Logout

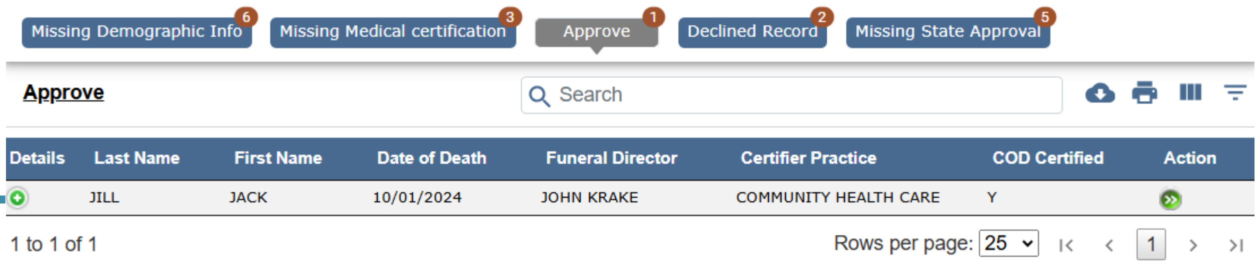
Click the exit icon to log out of the application.

Work Queues

Click the desired queue. The number shows how many records are on the queue.

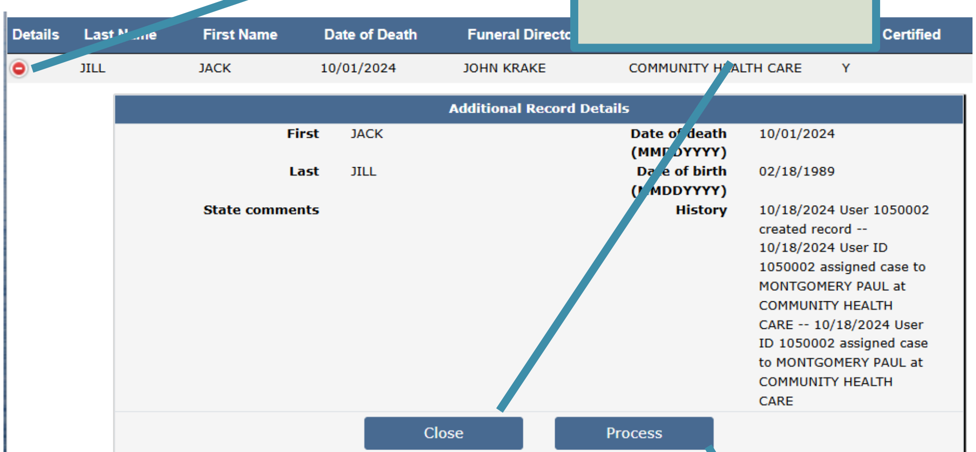


Show/hide additional record details



Click the plus sign to show additional record details.

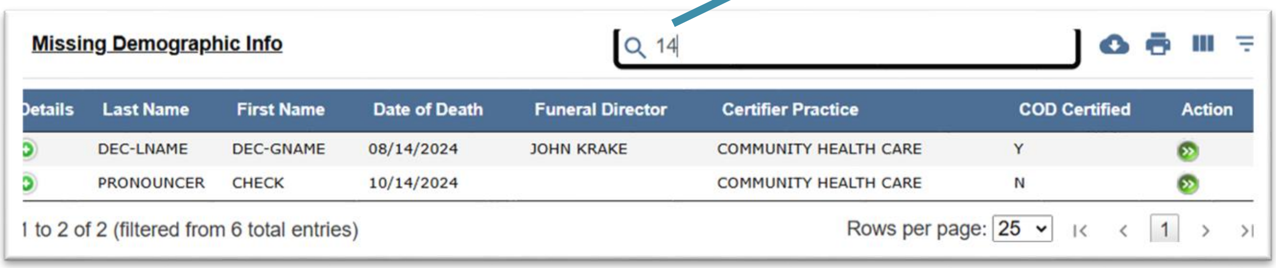
Click the minus sign or the Close button to hide the details.



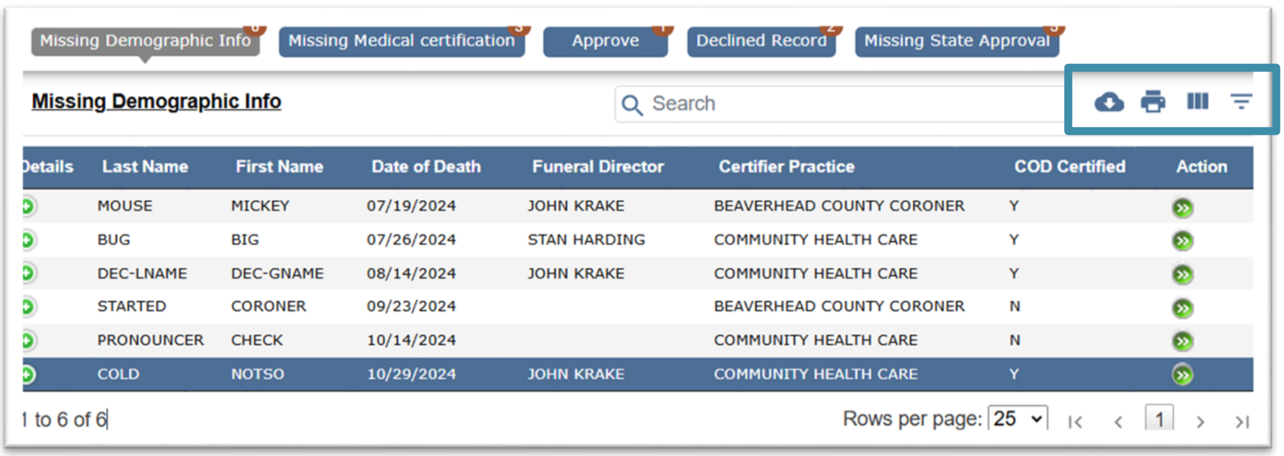
Click process to update the record.

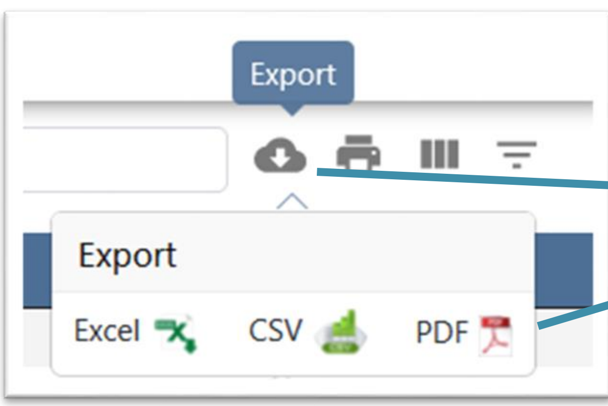
Search for a record on the queue

Start typing what you want to find.



Export queue contents



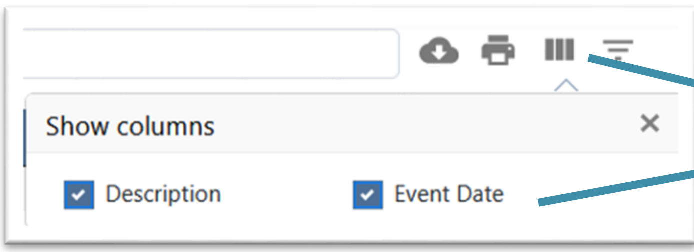


Click the export icon, then click the desired file type.

Print queue content

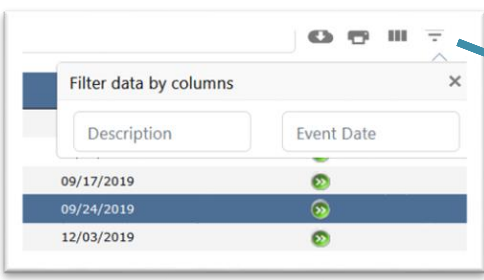
Click the print icon to begin the print process.

Change displayed columns

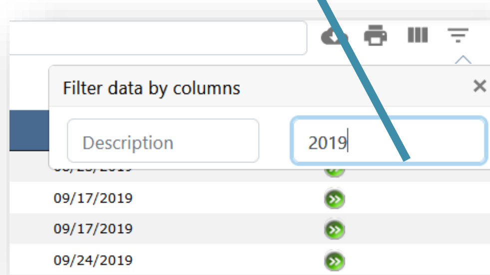


Click the columns icon, then check the desired columns.

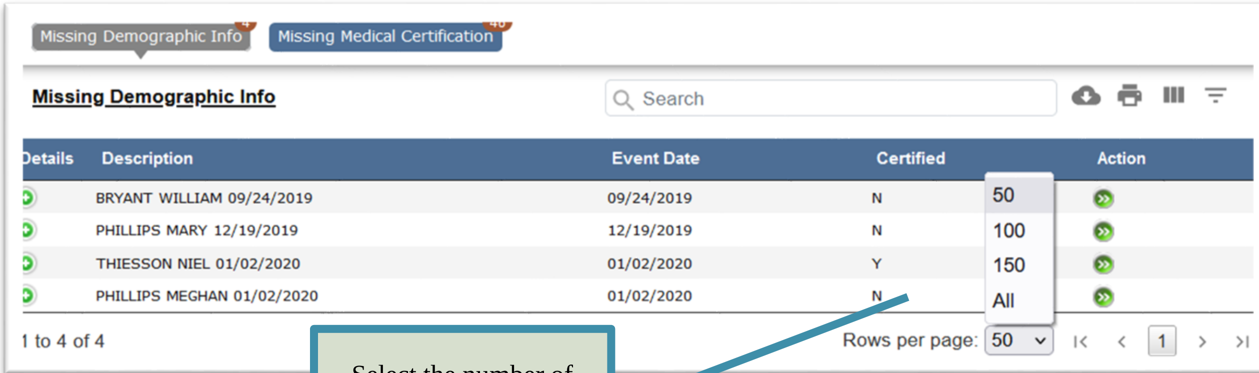
Filter records



Click the filter icon, then enter the filter value.

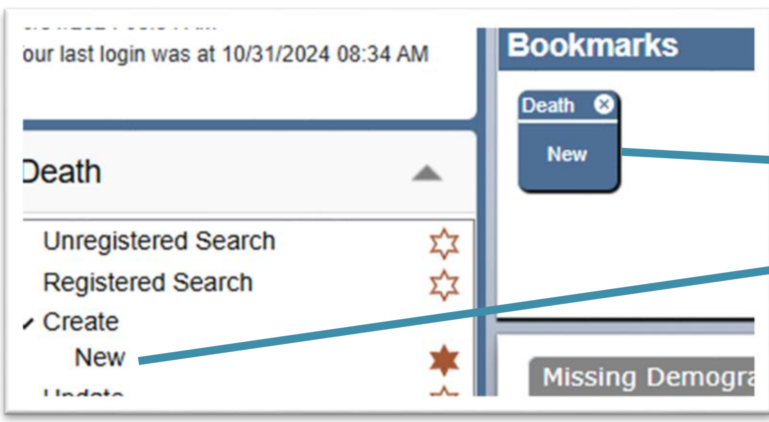


Adjust number of rows to show



Select the number of records to show on the same page.

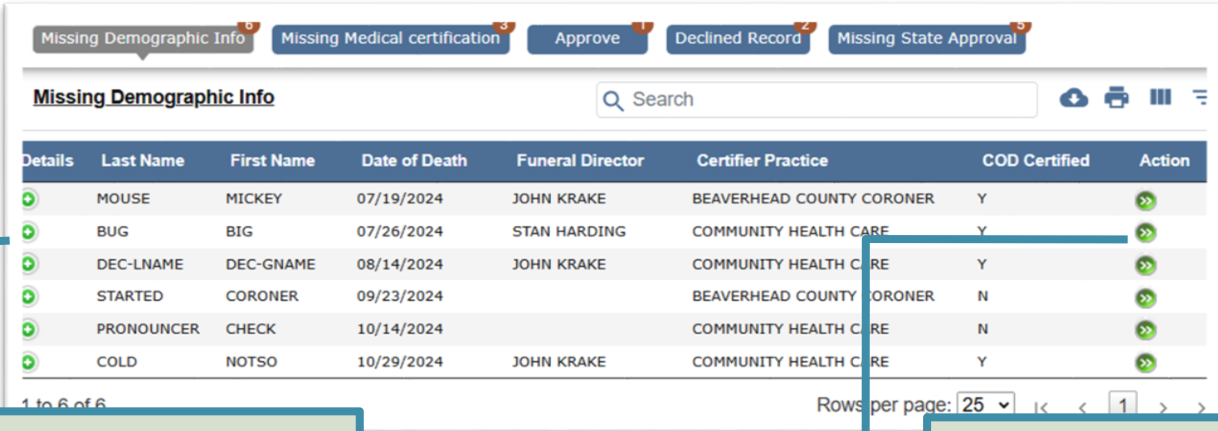
Create a record



Click the Create Bookmark if it is available or the Create New menu option.

Update a record

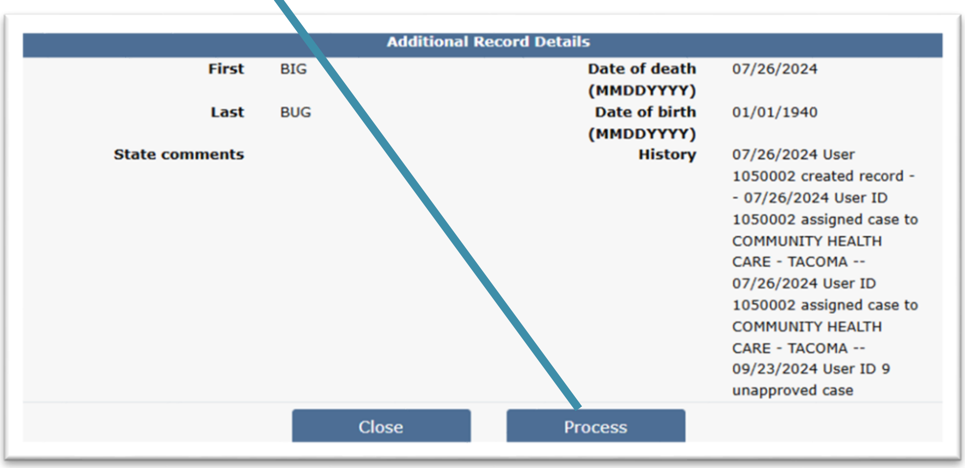
Use Update menu option or bookmark or select record from the Queue.



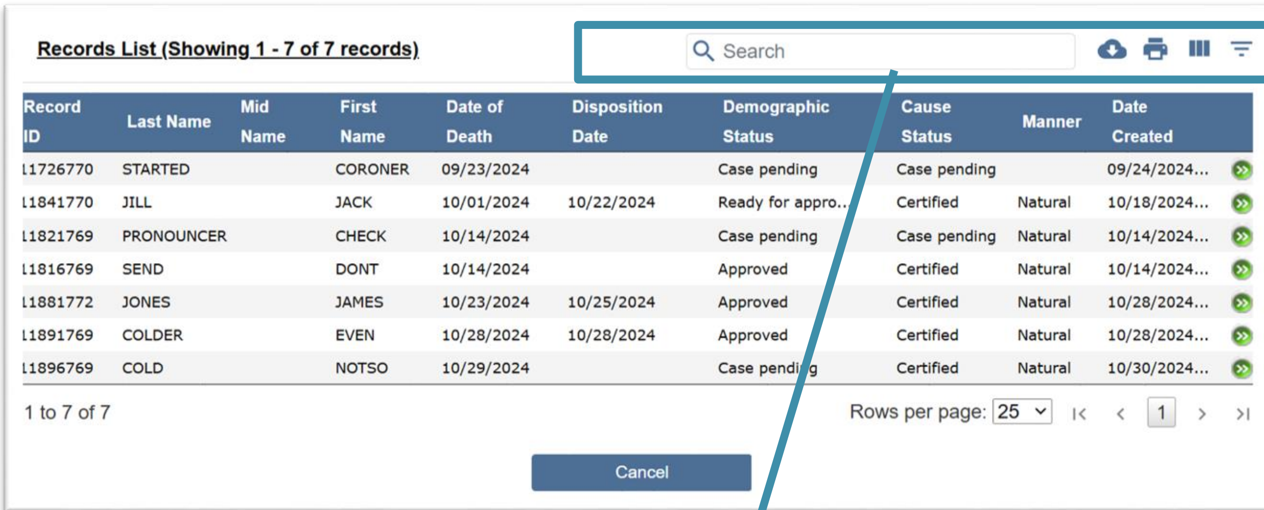
Click the plus sign to show additional record details, then click the Process button.

Or…

Click the double arrow Action icon.



Search Results Page



Records List (Showing 1 - 7 of 7 records)

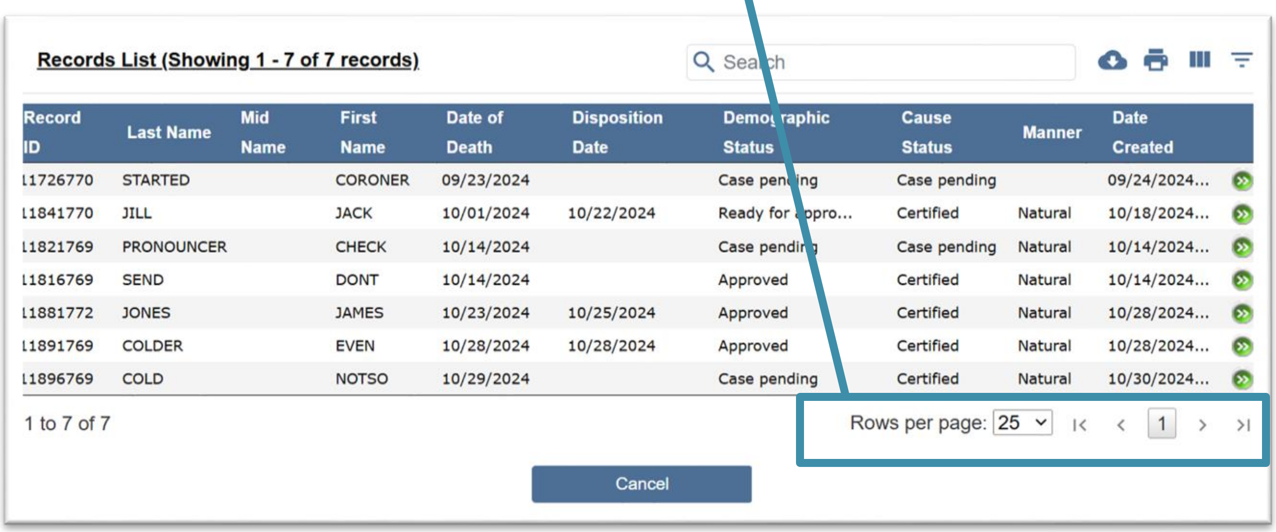
Search

Record ID	Last Name	Mid Name	First Name	Date of Death	Disposition Date	Demographic Status	Cause Status	Manner	Date Created
11726770	STARTED		CORONER	09/23/2024		Case pending	Case pending		09/24/2024...
11841770	JILL		JACK	10/01/2024	10/22/2024	Ready for appro...	Certified	Natural	10/18/2024...
11821769	PRONOUNCER		CHECK	10/14/2024		Case pending	Case pending	Natural	10/14/2024...
11816769	SEND		DONT	10/14/2024		Approved	Certified	Natural	10/14/2024...
11881772	JONES		JAMES	10/23/2024	10/25/2024	Approved	Certified	Natural	10/28/2024...
11891769	COLDER		EVEN	10/28/2024	10/28/2024	Approved	Certified	Natural	10/28/2024...
11896769	COLD		NOTSO	10/29/2024		Case pending	Certified	Natural	10/30/2024...

1 to 7 of 7 Rows per page: 25 1

Cancel

See “Work Queues” on page 3-5 for information about these features.



Records List (Showing 1 - 7 of 7 records)

Search

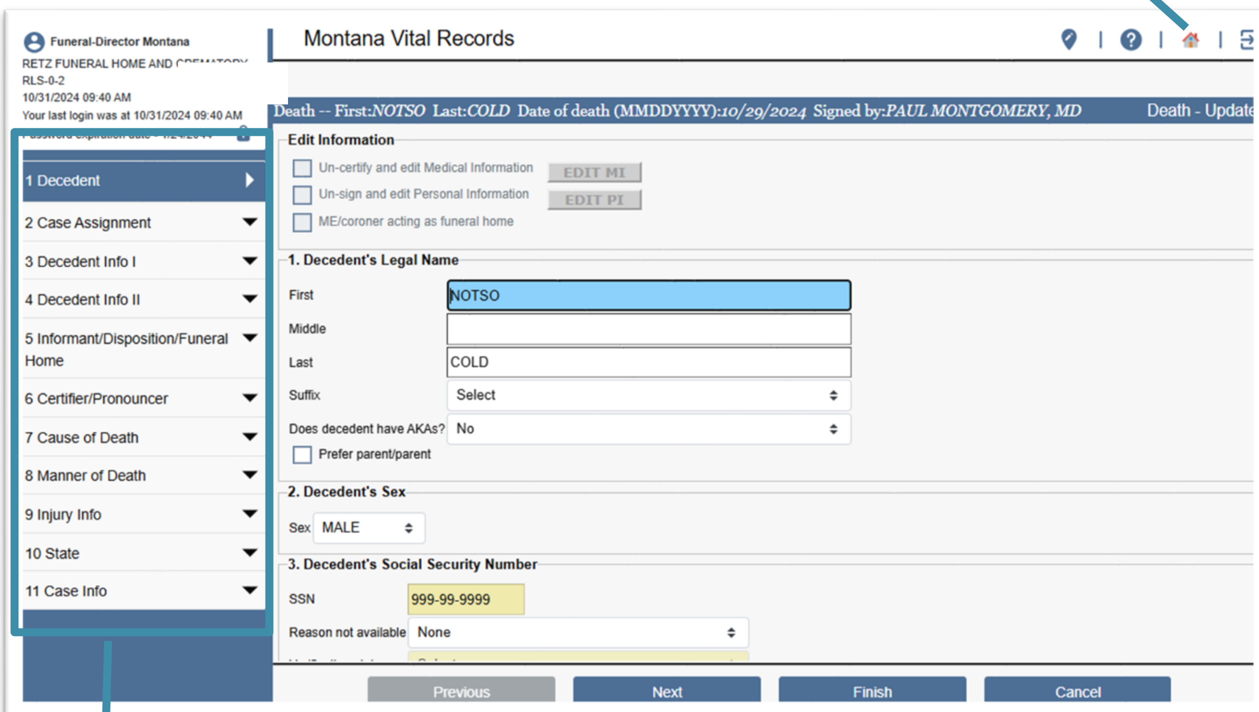
Record ID	Last Name	Mid Name	First Name	Date of Death	Disposition Date	Demographic Status	Cause Status	Manner	Date Created
11726770	STARTED		CORONER	09/23/2024		Case pending	Case pending		09/24/2024...
11841770	JILL		JACK	10/01/2024	10/22/2024	Ready for appro...	Certified	Natural	10/18/2024...
11821769	PRONOUNCER		CHECK	10/14/2024		Case pending	Case pending	Natural	10/14/2024...
11816769	SEND		DONT	10/14/2024		Approved	Certified	Natural	10/14/2024...
11881772	JONES		JAMES	10/23/2024	10/25/2024	Approved	Certified	Natural	10/28/2024...
11891769	COLDER		EVEN	10/28/2024	10/28/2024	Approved	Certified	Natural	10/28/2024...
11896769	COLD		NOTSO	10/29/2024		Case pending	Certified	Natural	10/30/2024...

1 to 7 of 7 Rows per page: 25 1

Cancel

Record data entry pages

Click the Home icon to return to the Dashboard. If you click this while in the record, you changes will not be saved.

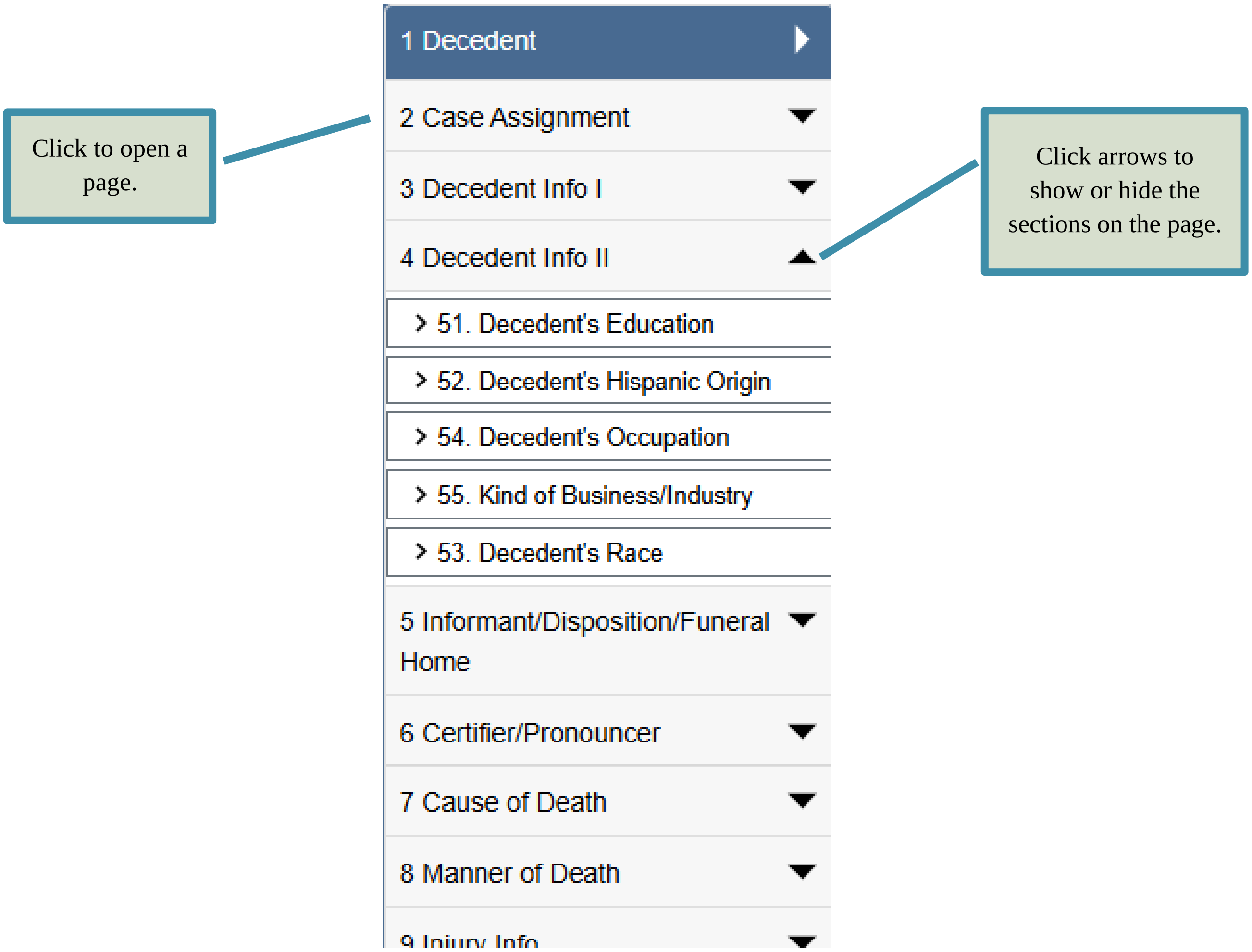


Navigation panel.

Click buttons to navigate between pages, or to save (Finish) or Cancel your changes.

VERS

Screen navigation panel



Chapter

4

Working with Death Records

VERS

4 Working with Death Records

In this chapter

This chapter explains the process of creating, completing and approving Death records. It also provides instructions for reviewing disposition requests and amending your registered records.

Note: Not all functions and fields discussed in this chapter are available to all users.

Introduction

This chapter includes instructions on how to complete a death record. Your role may be any of the following:

1. Create a new record.
2. Update a record that you created or that was referred to you.
3. Take over a record.
4. Review request for disposition request.

For each of the above, you will be responsible for certifying the medical portion of the record. In some cases, you will also need to enter the demographic information (i.e., you will act as funeral home) and approving the completed record.

Creating a Record

This section explains how to create and save a case. It also explains the VERS duplicate record process.

Note: It is good practice to save your record periodically. Please refer to "How to save a record" starting on page 4-5 if you are not familiar with this process.

How to create a case

Step 1 From the Main menu click **Death → Create → New**. The *Start Case* page appears (Figure 4-1).

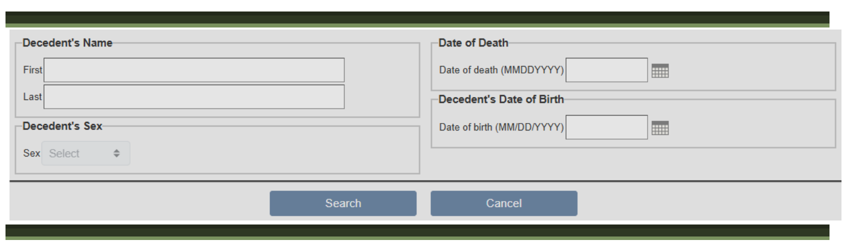


Figure 4-1 Start Case Information*: Information on this page is required and serves as search criteria to see if the case already exists.*

Step 2 Enter the requested information in all sections on this page. To enter the **Date of death** or the **Decedent's Date of Birth** from a calendar, click the calendar icon next to the date field and then find and click the correct date. Alternatively, you may enter the date by entering a two-digit month, two-digit day and four-digit year. The system adds slashes (e.g., 01212025 is formatted as 01/21/2025).

Step 3 Click the **Search** button. The system searches existing cases to find those that potentially match the one you are creating.

Step 4 If no potential matches are found, the first page of the form opens with the information you entered on the *Start Case* page already entered. If any potential matches are found, you will see a list of potential matches. Refer to section “How to proceed if duplicate record(s) found” on page 4-4 for information about what to do if this happens.

Tips: The *Decedent* page includes fields that you must complete to be able to save the case.

You can save the case by clicking the **Finish** button any time after you enter the required information on the *Decedent* page. You can add or correct information after it has been saved as explained in “Updating a Record” starting on page 4-6.

The numbers used in the section titles on this form correspond to the numbers on the Certificate of Death.

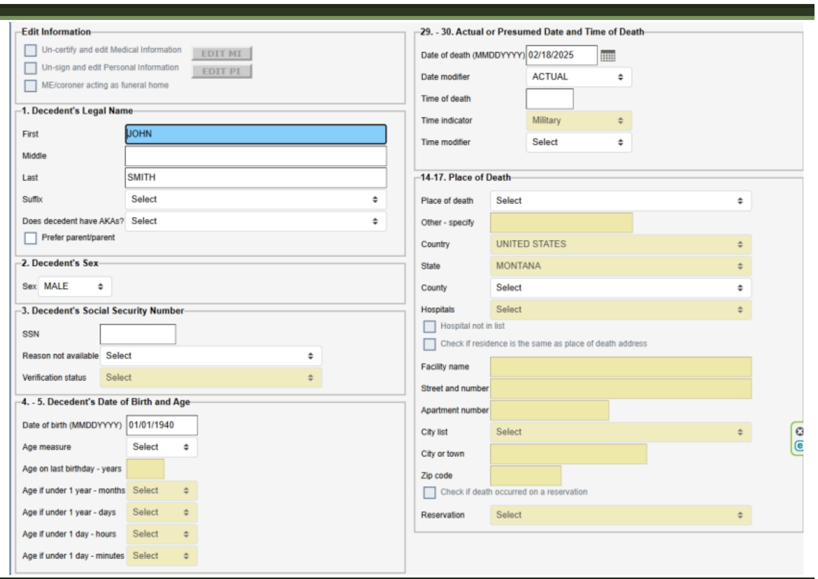


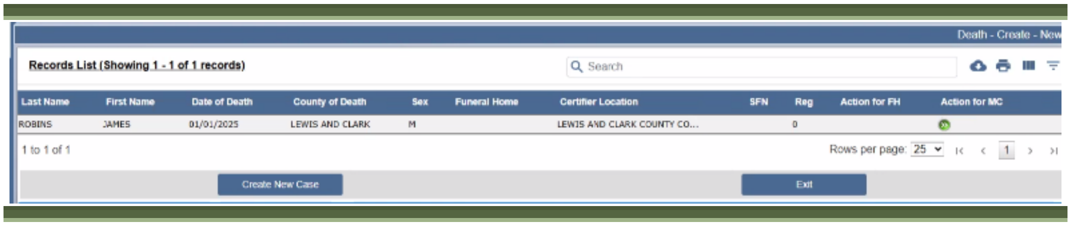
Figure 4-2 Death Form*: This page is populated with the information you entered on the Start Case page.*

Tip: Tabs 1, 3, 4, and 5 contain personal information. The medical information begins on tab **6 Certifier/Pronouncer**

How to proceed if duplicate record(s) found

If records matching the information you entered on the Create New Case page are found, what you can do next depends on who already owns the matching record.

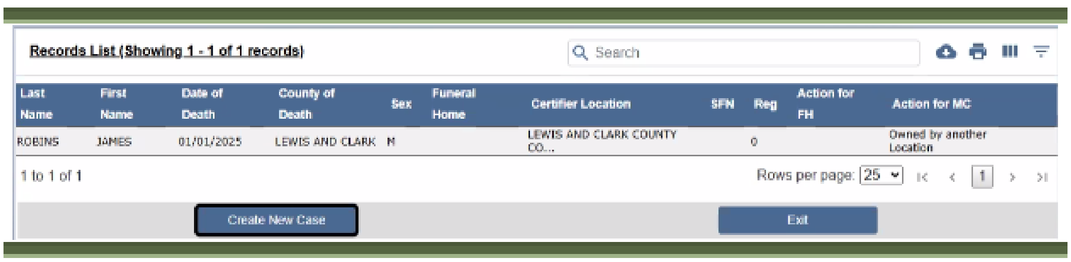
Matching record is owned by your location



You have three options if your location is listed as the certifier location on the record.

- Click the **double arrow** next to the record to continue working on it.
- Click **Create New Case** if you are sure that the case you want to create is not the one shown as a matching case.
- Click **Exit** if you are not sure which option to take and need to do some research.

Matching record is owned by another location



You have two options if your location is not the certifier on the record.

- Click **Create New Case** if you are sure that the case you want to create is not the one shown as a matching case.
- Click **Exit** if you are not sure which option to take and need to do some research.

How to save a record

Step 1 Click the **Finish** button at the bottom of any page. The **VERS** system displays a list of missing information. If all information has been entered, you will not see this page and you can skip to Step 3.

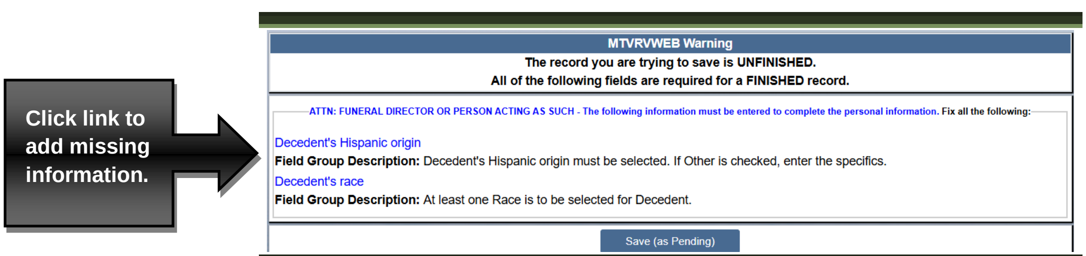


Figure 4-3 Sample Warning Page: *This page advises you that more information must be entered before you will be able to save a complete record.*

Step 2 At this point you can:

Enter the missing information by clicking a link on the ***VERS** Warning* page to return to the record and add the missing information. When you are ready, click the **Finish** button at the bottom of any page.

Or

Save the record as unfinished by clicking the **Save (as Pending)** button. You can update the record at a later time as explained in "Updating a Record" on page 4-6.

Step 3 Whether you enter all missing information and click **Finish** again or click the **Save** (as Pending) button, the *Successful Transaction* page opens (Figure 4-4). See "The Successful Transaction page" on page 4-26 for information about using the options on this page.

The options you see depend on your user role and the information in the record you are saving.

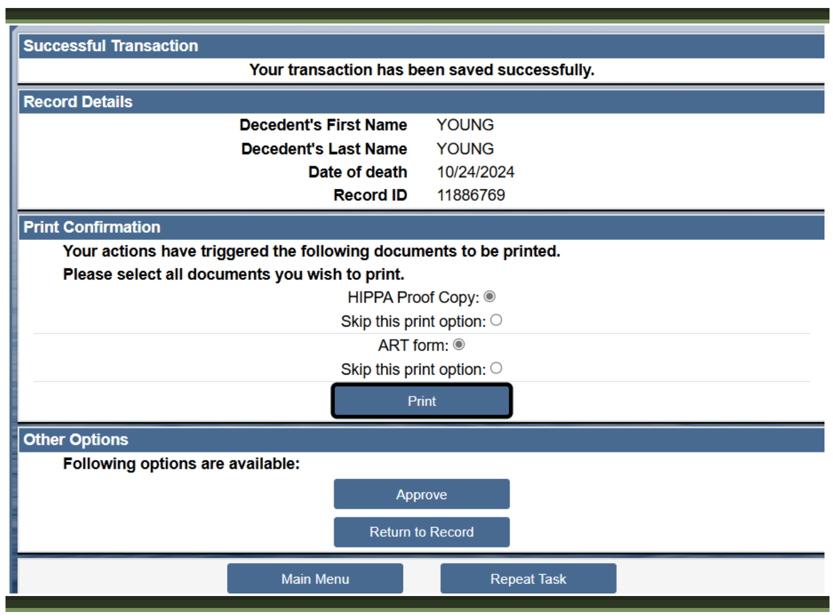


***Figure 4-4 Sample Successful Transaction page**: This page provides information and options further action.*

Step 4 Complete any options presented if you are ready to do so.

Step 5 Click the **Main Menu** or **Repeat Task** button if you have finished the other options.

Updating a Record

How to update a record on your work queue

Any case where you are responsible for completing the demographic information and approving the record are shown in your **Missing Demographic Info** work queue until it is complete, and you approve it. You can update a record on this queue, or you can use the Update menu option.

To update a case from your work queue:

Step 1 From your **Missing Demographic Info** queue or your **Missing Medical Info** queue, click the **double arrow** next to the record you want to update. The selected record opens.

Step 2 Make your changes and then click the **Finish** button. Please refer to "How to create " on page 4-3 if you need additional information about entering information in the report.

How to update a case from the menu panel

Step 1 From the Main menu click **Death→ Update**. The *Search Criteria* page opens.

Step 2 Enter your search criteria and click the **Search** button. A search results page displays records that match the criteria you entered.

Step 3 Click the **double arrow** next to the record you want to update. The *Record Details* page opens.

Step 4 Click the **Continue** button at the bottom of any *Record Details* page. The selected record opens.

Note: If you are unfamiliar with the search process or need more help, please refer to the chapter called "Viewing & Retrieving Records."

Step 5 Make your changes and then click the **Finish** button.

How to complete medical information

Step 1 Open the record from your **Missing Medical Info** queue or from the **Update** option on the menu panel of your **Dashboard**. The medical information begins on **tab 6 Certifier/Pronouncer**.

Note: The **Edit information** section allows you to edit medical information on a record you certified as long as the State has not completed their review of the record.

Step 2 Click the **Certifier** page tab. The *Certifier* page opens.

Step 3 Enter or select information in the **Person Completing Cause of Death (i.e. Certifier)**, **Certifier's Address**, **Certifier's Title and License Number**, **Date Certified**, **Pronouncement Information** and **ME/Coroner Contacted?** sections.

Application notes for the *Certifier* page:

- In the **Person Completing Cause of Death** section:
  - The **Certifier designation** is already set to ME/coroner.

- Select the **ME/coroner** who is certifying cause info. The name and email information is populated when you make your selection.

- Information in the **Certifiers Address** section is automatically set based on your logged on location.
- The information in the **Certifier's Title and License Number** section is automatically populated when you select the certifying ME/coroner.
- In the D**ate Certified** section, the date is automatically set when the record is certified.
- In the **Pronouncer Information** section:
  - If the pronouncer's **Title** is RN, you cannot enter the pronouncer's name.
  - If the pronouncer is the certifier, select the checkbox to copy the certifier information to the pronouncer fields.
  - You must enter the date and time information manually.

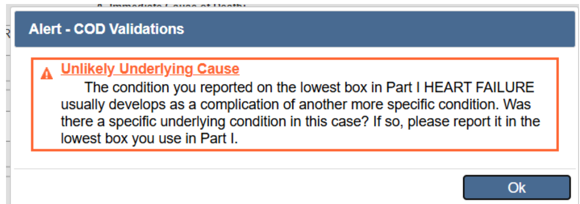
Step 4 Click the **Next** button, the **Cause of Death** page tab or use the **Alt + N** keys on your keyboard. The *Cause of Death* page opens.

Step 5 Enter or select information in the **Cause (Part I)**, and **Other Significant Conditions (Part II)** sections.

Application notes for the *Cause of Death* page:

- In the **Cause** of death (**Part I**) section:
  - Enter the **Cause of Death** information. For each cause line entered in Part I:
    - Select the time **Unit**.
    - If the **number** of the unit is known, enter the number.
  - If the cause is not known at this time, select (check) the **Pending** checkbox. You can submit an amendment when the cause is known as explained in "Amending Records" 4-28.
- If there were any other significant conditions, enter them in the **Other Significant Conditions (Part II)**

Note: The system runs cause checks and displays pertinent alerts when you leave this tab by going to another tab or clicking the Finish button. You should modify the cause information per the alert.



Step 6 Click the **Next** button, the **Manner of Death** page tab or use the **Alt + N** keys on your keyboard. The *Manner of Death* page opens.

Step 7 Enter or select information in the **Autopsy**, **Tobacco Use, Pregnant at Time of Death**, and **Manner of Death** sections.

Application notes for the *Manner of Death* page:

- In the **Pregnant at Time of Death** section:
    - If the decedent is a female aged 10-54, select the pregnancy status at the time of death.
    - If the decedent is a female less than 10 or more than 54 years old or a male, pregnancy status is not required unless you select (check) you are reporting a pregnancy for a female outside of the common age (10-54) or for a male. If you select this checkbox, select the pregnancy status, and then check the box to confirm.
- Complete the information in the other sections on this page.

Step 8 Click the **Next** button, the **Injury Info** page tab or use the **Alt + N** keys on your keyboard. The *Injury Info* page opens.

- If you need to enter injury information, begin by entering the **Date of injury**. When you do this, you will be able to enter additional injury information.
- If the **Location of Injury** is the same as the place of death, select the **Same as place of death** section. The system will then copy the place of death address info to the Location of Injury section.
- In the **Transportation Accident** section:
    - If you select Yes for **Was this a transportation injury**, select the role of the decedent in the accident.
    - If you select Other, specify the other role.

Step 9 Click the **Finish** button at the bottom of the page. At this point the **VERS** system will display a list of missing information (Figure 4-7). The section of this page beginning with **ATTN: MEDICAL CERTIFIER** shows missing medical information.

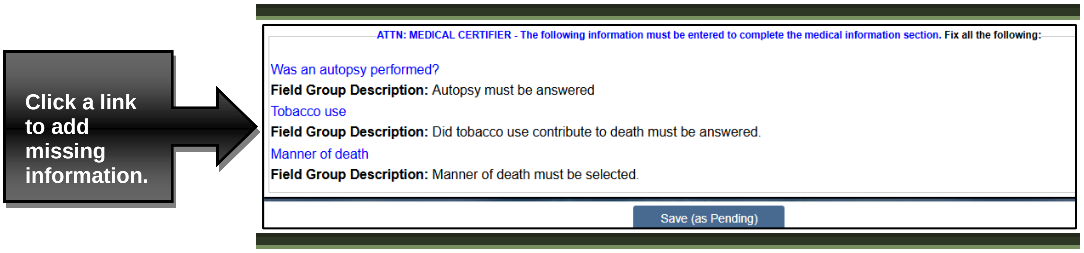


Figure 4-5 Sample Pending Information List: *From here you can save the record as it is or reopen the record to add the missing information.*

Note: After saving an unfinished record, you can return to the record by selecting it from your work queue (e.g. **Missing Demographic Info** queue or your **Missing Medical Info** queue.

Step 10 At this point you can:

Enter the missing information by clicking a link on the **VERS** Warning page to return to the record and add the missing information. When you are ready, click the **Finish** button as you did before in Step 9.

Or

Save the record as unfinished by clicking the **Save (as Pending)** button. If you still need to add information before submitting it to the state, you can update the case at a later time as explained in “Updating a Record” on page 4-6.

Step 11 When you click the **Save (as Pending)** button, you will receive a successful transaction message as shown in Figure 4-8. You will also see a **Print Confirmation** section that allows you to print relevant death document(s) for your record. See “How to print from the Print Confirmation section” on page 4-27 for more information about the print section.

Figure 4-6 Successful Transaction: *From this page, you can print a selected document, return to the record, repeat the current task or return to the Main page.*

Step 12 Click the Return to Record button to continue work on the record. Otherwise click the **Main Menu** button or **Repeat Task** button.

Note: “Medical Information complete” on page 4-17 explains how to certify a record. “Record Complete” on page 4-21 explains how to certify and approve/file a record with one button if you are the certifier for the record and you are acting as a funeral home.

How to complete demographic information

Note: If you are acting as FH (i.e., the checkbox for **ME/coroner acting as funeral home** in the **Edit Information** section on Tab 1 is checked), you will need to complete the demographic information section and approve the record as ready for state review.

Step 1 Open the record from your **Missing Demographic Info** queue or from the **Update** option on the menu panel of your **Dashboard**. The selected record opens.

Step 2 Enter/modify or select information in the **Edit Information**, **Decedent’s Legal Name**, **Decedent’s Sex**, **Decedent’s Social Security Number**, **Decedent’s Date of Birth and Age**, **Actual or Presumed Date and Time of Death**, and **Place of Death** sections.

Application notes for the *Decedent* page:

Note: The **Edit information** section allows you to indicate that you will be acting as a funeral home. It also allows you to edit approved/filed personal information (if you are acting as a funeral home) and certified medical information as long as the State has not completed their review of the record. Finally, it allows you to take over a case where the certifier is not a coroner as long as the death occurred in your county.

- In the **Decedent’s Legal Name** section:
  - If the decedent has any AKA/alias, select **YES** to **Does decedent have AKAs**? In this case, the Decedent AKAs page opens when you click **Next** so that you can enter the AKA/alias.
  - Check the **Prefer parent/parent** checkbox if the informant wants parent/parent to be used when printing the certificate instead of mother/father.
- When the **First name**, **Last name**, **Sex**, **Date of Birth** and **Social Security number** info is entered, this information will be sent for SSN verification when you save the record. For more information about SSN verification, please refer to “SSN verification” on page 4-25.
- If you are not able to obtain the SSN, select the reason it is not available.

- In the **Decedent's Date of Birth and Age** section:
  - The selected **Age measure** determines what other information you will be able to enter in the other Age fields (i.e., years, months, etc.).
  - The age is calculated and displayed in the corresponding age field. If this is not the correct age, you should verify that you have entered the correct Date of birth and the correct Date of death.
  - You will have to enter the age that is correct for the date of death and the date of birth before you can successfully finish the personal information section.
- In the **Actual or Presumed Date and Time of Death** section **Date modifier** and **time indicator time** are automatically set when you create a record. You can change these as needed.
- In the **Place of Death** section:
  - After you select the **Place of Death** and **County**, the other fields open for data entry. You are only able to add records for the county location you are logged in as.
  - Your selection of **Place of Death** determines whether the **Hospital list** becomes enabled.
  - When you select from the **Hospital list**, the name and address are populated for you.
  - If the facility is not listed in the drop down, select **Hospital not in list** and enter the name and address manually.
  - Changing the **Place of death** may remove the place of death name and address information previously entered.
  - If you select **Check if residence is the same as place of death**, you will not be able to enter the place of death address. Instead, you will enter/modify the residence address on Tab 3. This address will be copied for you to the Place of Death address fields.
  - You must specify the other place if you select **OTHER** in the **Place of Death** list.
  - If you check the **Check if death occur on a reservation** checkbox, you can then select the **Reservation**.

Step 3 Click the **Next** button or use the **Alt + N** keys on your keyboard. If you indicated that the Decedent has AKA/alias, the *Decedent AKAs* page opens.

Note: If the decedent does not have any AKA/alias, the *Decedent AKAs* page does not open, and you should skip to Step 5.

Step 4 Enter or select information in the **Number of AKAs being added**, **First AKA** through **Fifth AKA** sections.

Application note for the *Decedent AKAs* page:

- Your answer to **How many AKAs will you be adding** determines how many AKA sections become available for data entry.

Step 5 Click the **Next** button, the **Case Assignment** page tab or use the **Alt + N** keys on your keyboard. The *Case Assignment* page opens. See "Case Assignment Page" on page 4-24.

Step 6 Click the **Next** button, the **Decedent Info I** page tab or use the **Alt + N** keys on your keyboard. The *Decedent Info I* page opens.

Step 7 Enter or select information in the **Birthplace**, **Decedent's Residence**, **US Armed Forces**, **Marital Status at Time of Death**, **Surviving Spouse's Name**, **Father's Name** and **Mother's Name** sections.

Application notes for the *Decedent Info I* page:

- In the Birthplace section:
  - If the birth country is not known, select the **Unknown place of birth** checkbox.
  - If the birth country is the United States or Canada, but the state or province is not known, select **Unknown** in the **State/province** list.
  - If the country and state/province are known, but the city is not known, enter **Unknown** in the **City** textbox.
- In the **Decedent's Residence** section:
  - If the address is not known, enter **Unknown** for the **Complete number and street** field.
  - If the country is not known, select **Unknown** in the **Country** list. In this case, you will not be able to enter any other information in this section.
  - If the country is the United States or Canada, but the state or province is not known, select **Unknown** in the **State/province** list. In this case, you will not be able to select a county, but you can enter the name of the city if know or enter **Unknown** in the **City** text box if it is not known.
  - If the **Zip code** is not known, enter **99999**.
  - If it is not known if the residence is **Inside city limits**, select **Unknown**.
- If the **Marital Status** of the decedent is married or separated, enter the spouse's name in the **Surviving Spouse's Name** section. If the name of the spouse is not known, select (check) **Unknown**.
- In the **Father's Name and Mother's Name** sections, if the name of the decedent's mother and/or father is not known, select/check the corresponding **Unknown** checkbox.

Step 8 Click the **Next** button, the **Decedent Info II** page tab or use the **Alt + N** keys on your keyboard. The *Decedent Info II* page opens.

Step 9 Enter or select information in the **Decedent's Education**, **Decedent's Hispanic Origin**, **Decedent's Occupation**, **Kind of Business/Industry** and **Decedent's Race** sections.

Application notes for the *Decedent Info II* page:

- In the **Decedent's Education** section, you will be asked to verify the selected education level if it is not in alignment with the age of the decedent.
- In the **Hispanic Origin** section:
  - Select (check) all pertinent checkboxes.
  - If you select **Yes, other Spanish/Hispanic/Latino***,* enter additional information in the **Specify other** textbox.
- If the **Decedent's Occupation** and/or **Kind of Business/Industry** are not known, enter **Unknown**.
- In the **Race** section:
  - Select (check) all pertinent checkboxes.
  - Enter additional information in the textboxes as needed.

Step 10 Click the **Next** button, the **Informant/Disposition/Funeral Home** page tab or use the **Alt + N** keys on your keyboard. The *Informant/Disposition/Funeral Home* page opens.

Step 11 Enter or select information in the **Informant's Name/Relationship/Mailing Address**, **Method of Disposition, Place of Disposition**, **Funeral Facility**, **Funeral Licensee or Other Person in Charge of Disposition**, and **Date of Disposition** sections.

Application notes for the *Informant/Disposition/Funeral Home* page:

- In the **Informant's Name/Relationship/Mailing Address** section:
  - If the relationship of the informant to the decedent is not listed, select Other, and then enter the unlisted relationship in the **Other – specify relationship** textbox.
  - If the informant shared the same residence as the decedent, select (check) the **Copy decedent's residence address to informant's Address** checkbox to avoid re-entering the same information.
  - If the country is not known, select **Unknown** in the **Country** list.
  - If the country is the United States or Canada, but the state or province is not known, select **Unknown** in the **State/province** list.
- If the **Method of disposition** is not specifically listed, select Other and then specify the method in the **Other – specify** textbox.
- In the **Method of Disposition** section your selection of the method determines what fields open in the **Place of Disposition** section.

- If the method is **Burial**, **Cremation** or **Entombment**, you can select the place from the **Cemeteries/Crematories/Entombments** list or enter the name and address manually.
- If the method is **Body not recovered** or **Unknown**, you cannot enter name and address information.
- For all other methods, you must enter the name and address manually.
- In the **Place of Disposition** section, you must enter the **Address and/or coordinates** for home burials when you select the **Home burial** checkbox.

Step 12 Click the **Finish** button at the bottom of any page. At this point the **VERS** system will display a list of missing information (Figure 4-7). The section of this page beginning with **ATTN: FUNERAL DIRECTOR OR PERSON ACTING AS SUCH** shows missing demographic information.

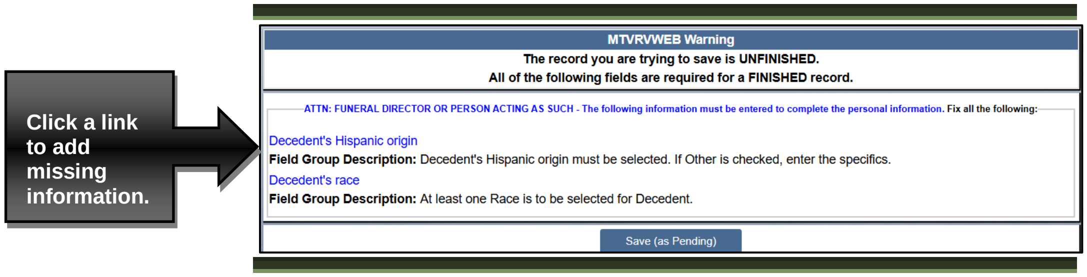


Figure 4-7 Sample Pending Information List*: From here you can save the record as it is or reopen the record to add the missing information.*

Note: After saving an unfinished record, you can return to the record by selecting it from your work queue (e.g. **Missing Demographic Info** queue or your **Missing Medical Info** queue.

Step 13 At this point you can:

Enter the missing information by clicking a link on the **VERS** Warning page to return to the record and add the missing information. When you are ready, click the **Finish** button as you did before in Step 12.

Or

Save the record as unfinished by clicking the **Save (as Pending)** button. If you still need to add information before submitting it to the state, you can update the case at a later time as explained in “Updating a Record” on page 4-2.

Step 14 When you click the **Save (as Pending)** button, you will receive a successful transaction message as shown in Figure 4-8. You will also see a **Print Confirmation** section that allows you to print relevant death document(s) for your record. See “How to print from the Print

Confirmation section” on page 4-27 for more information about the print section.

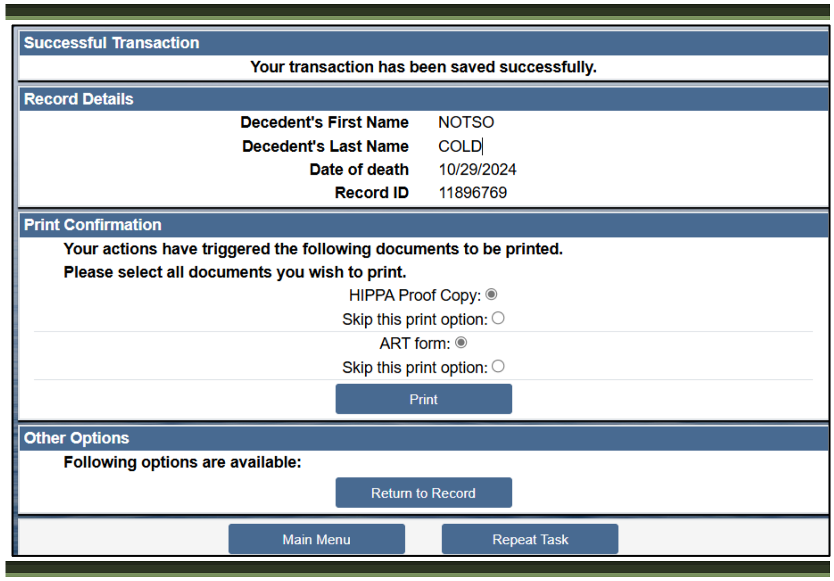


***Figure 4-8 Successful Transaction**: From this page, you can print a selected document, return to the record, repeat the current task or return to the Main page.*

Step 15 Click the Return to Record button to continue work on the record. Otherwise click the **Main Menu** button or **Repeat Task** button.

Note: “Medical Information Certified” on page 4-19 explains how to approve a record where you are acting as a funeral home. “Record Complete” on page 4-21 explains how to certify and approve/file a record with one button if you are the certifier for the record and you are acting as a funeral home.

Taking over a case

Should the need arise, you can take over a case where the certifier is not a coroner as long as the death occurred in your county. When you do this, you will be able to update the record and the original certifier on the record will no longer be able to update it.

How to take over a case

Step 1 From the Main menu click **Death→ Update**. The *Search Criteria* page opens.

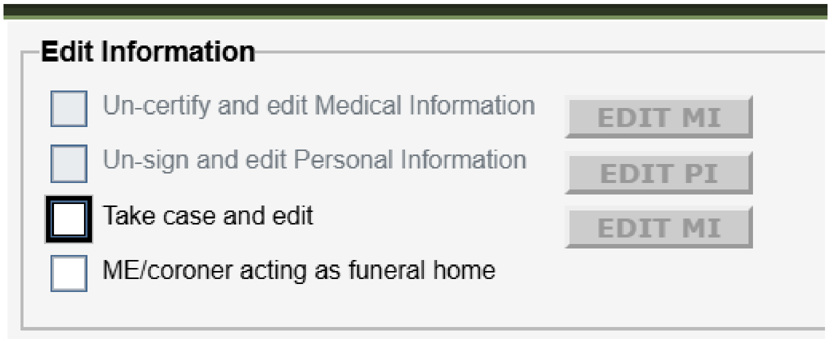
Step 2 Enter your search criteria and click the **Search** button. A search results page displays records that match the criteria you entered.

Step 3 Click the **double arrow** next to the record you want to take over. The *Record Details* page opens.

Step 4 Click the **Continue** button at the bottom of any *Record Details* page. The selected record opens.

Note: If you are unfamiliar with the search process or need more help, please refer to the chapter called “Viewing & Retrieving Records.”

Step 5 Check **Take case and edit**. Then click the adjacent **Edit MI** button. The medical fields open so that you can enter/modify medical information.



Step 6 Select your name from the **ME/coroners** list on **Tab 6 Certifier/Pronouncer**. Complete and certify the record. See “How to complete medical information” on page 4-7 for information about the medical tabs and “Medical Information complete” on page 4-17 for instructions for certifying.

Note: You will also take over a case when you deny disposition approval as explained in “How to deny disposition” on page 4-23.

Medical Information complete

If the medical information record you are working on is complete,

- you will see a **Ready to Certify** button if your role is to only enter data for records at your facility in the **Other Options** section of the *Successful Transaction* page. See “How to mark a record as ready to certify from the Other Options section” on page 4-18 for information about this process.
- you will see a **PRESS TO CERTIFY** button if you your role allows you to certify records in the **Other Options** section of the *Successful Transaction* page. See “How to certify a record from the Other Options section” on page 4-19 for information about this process.

Note: You will see a **CERTIFY & APPROVE** button in the **Other Options** section of the *Successful Transaction* page if your role allows you to certify records AND you are acting as a funeral home and the personal information is complete. See “How to certify and approve in one step” on page 4-21 for information about this process.

How to mark a record as ready to certify from the Other Options section

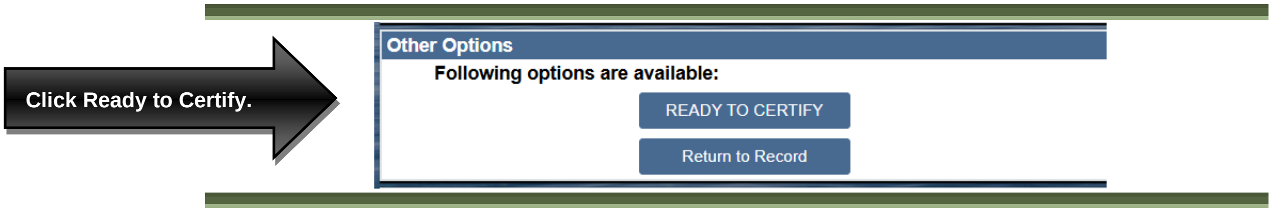


***Figure 4-9 Other Options Section of Successful Transaction page**: Begin the process of marking the record as ready to certify (data entry role) from this section.*

Step 1 Click the **READY TO CERTIFY** button.

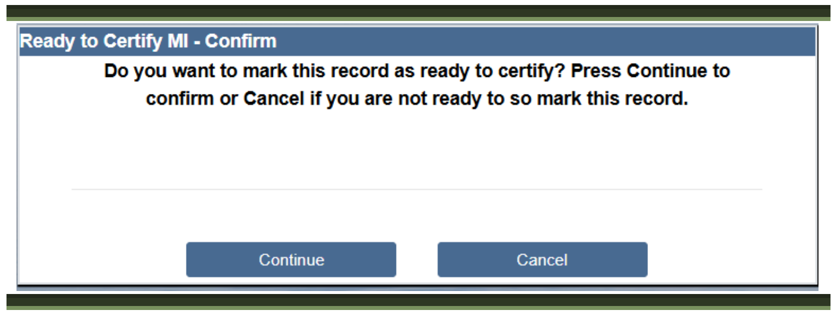


***Figure 4-10 Confirm Ready to Certify**: Continue the process of marking the record as ready to certify (data entry role).*

Step 2 Click **Continue** to complete the process and save you work as noted on the Successful Transaction page.

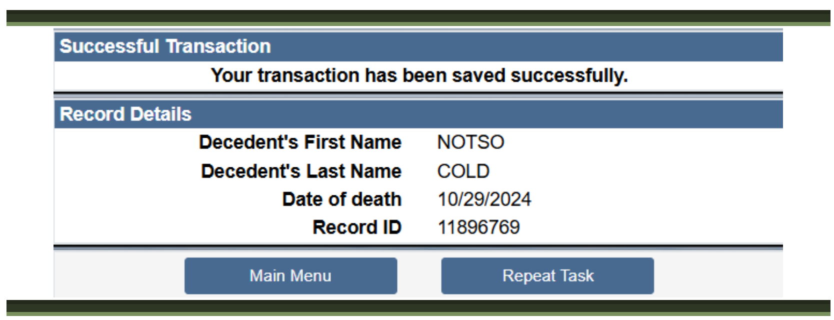


***Figure 4-11 Successful Transaction**: Record successfully saved. Click Main Menu to return to the Main Menu.*

Note: Records ready to certify are added to the certifier's Certify MI queue.

How to certify a record from the Other Options section

Figure 4-12 Other Options Section of Successful Transaction page*: Begin the process of certifying a record from this section.*

Step 1 Click the **PRESS TO CERTIFY** button.

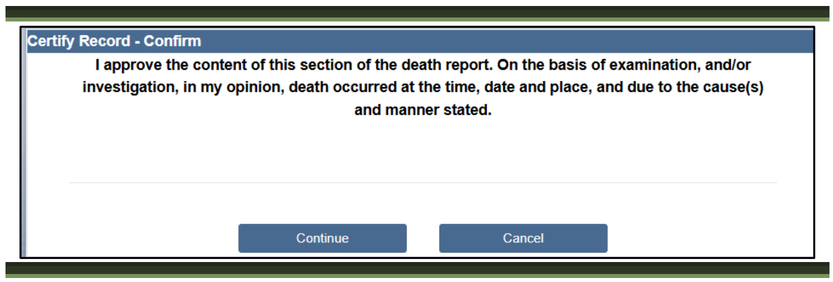


Figure 4-13 Confirm Certify Record*: Continue the process of approving a record (certifier role).*

Step 2 Click **Continue** to complete the process and save you work as noted on the *Successful Transaction* page.

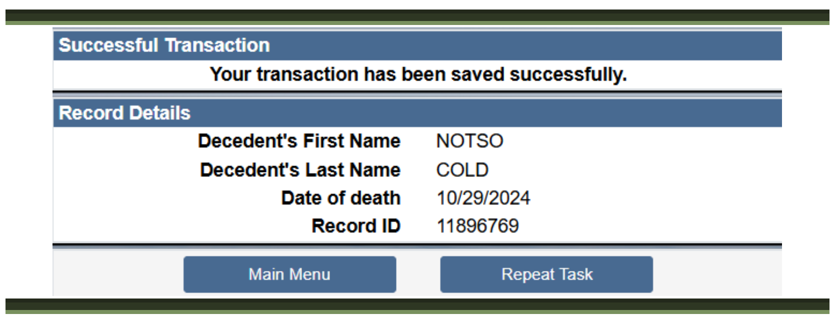


Figure 4-14 Successful Transaction*: Record successfully saved. Click Main Menu to return to the Main Menu.*

Medical Information Certified

How to mark a record as ready to approve from the Other Options section

For persons designated as data entry staff: If the record you are working on is certified and acting as funeral home is checked and the personal information is complete, you will see a **Ready to Approve** button in the **Other Options** section of the *Successful Transaction* page.

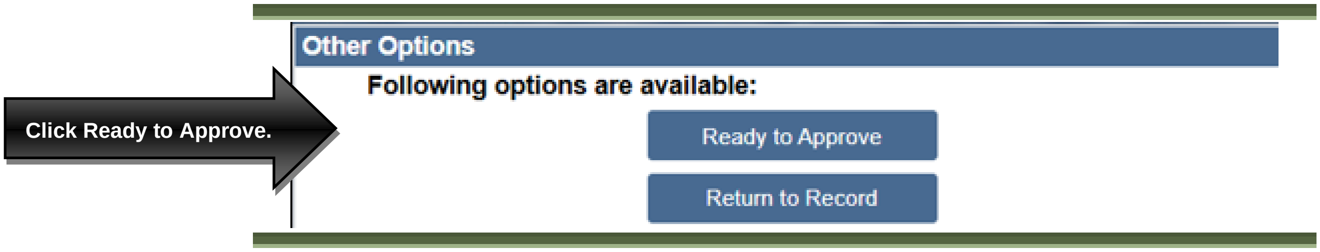


Figure 4-15 Other Options Section of Successful Transaction page*: Begin the process of marking the record as ready to approve from this section.*

Step 1 Click the **Ready to Approve** button.

Figure 4-16 Confirm Ready to Approve PI*: Continue the process of marking the record as ready to approve a record (data entry role).*

Step 2 Click **Continue** to complete the process and save you work as noted on the *Successful Transaction* page.

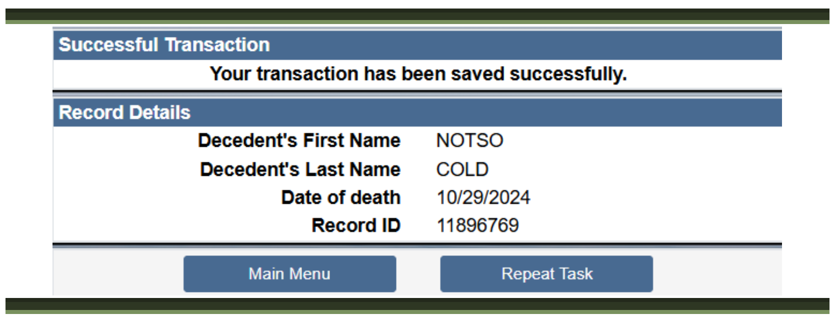


Figure 4-17 Successful Transaction*: Record successfully saved. Click Main Menu to return to the Main Menu.*

Note: Records ready to approve are added to the certifier's **Approve** queue.

How to approve a record from the Other Options section

For medical certifiers: If the record you are working on is certified and acting as funeral home is checked and the personal information is complete, you will see an **Approve** button in the **Other Options** section of the *Successful Transaction* page.

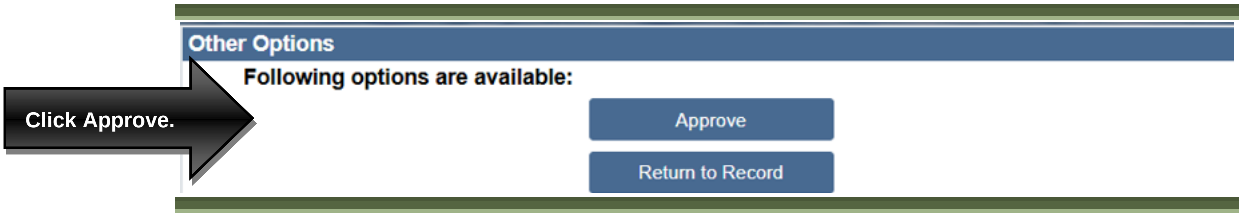


***Figure 4-18 Other Options Section of Successful Transaction page**: Begin the process of approving a record (data entry role) from this section.*

Step 1 Click the **Approve** button.

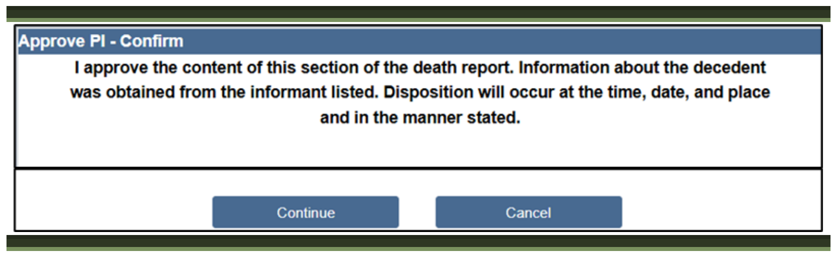


***Figure 4-19 Confirm Approve PI**: Continue the process of approving a record (funeral director role).*

Step 2 Click **Continue** to complete the process and save you work as noted on the Successful Transaction page.

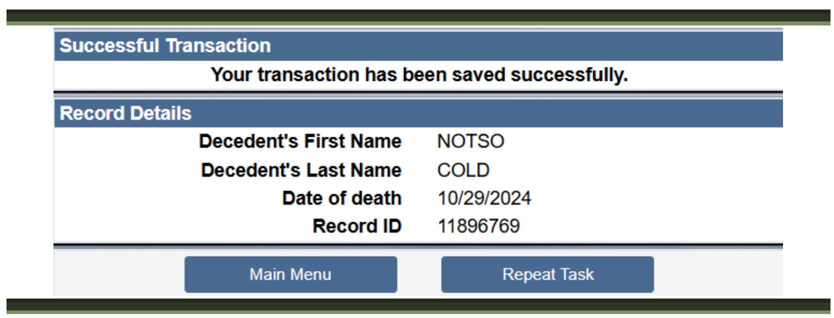


***Figure 4-20 Successful Transaction**: Record successfully saved. Click Main Menu to return to the Main Menu.*

Note: Approved records are ready for State review.

Record Complete

How to certify and approve in one step

For medical certifiers: If acting as funeral home is and all personal and medical information is complete, you will see an **CERTIFY & APPROVE** button in the **Other Options** section of the *Successful Transaction* page. This button allows you to both certify and approve/file a record at the same time.

Figure 4-21 Other Options Section of Successful Transaction page*: Begin the process of certifying and approving from this section.*

Step 1 Click the **CERTIFY & APPROVE** button.

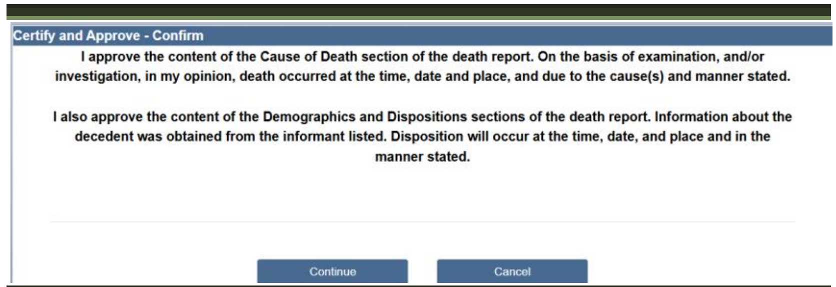


Figure 4-22 Confirm Certify and Approve*: Continue the process of certifying and approving a record.*

Step 2 Click **Continue** to complete the process and save you work as noted on the Successful Transaction page.

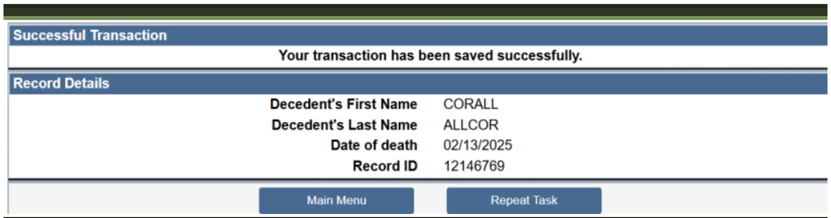


Figure 4-23 Successful Transaction*: Record successfully saved. Click Main Menu to return to the Main Menu.*

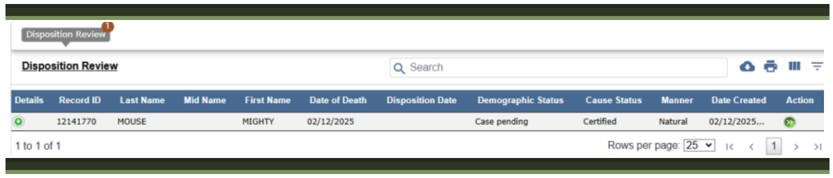
Note: Approved records are ready for State review.

Reviewing Disposition Requests

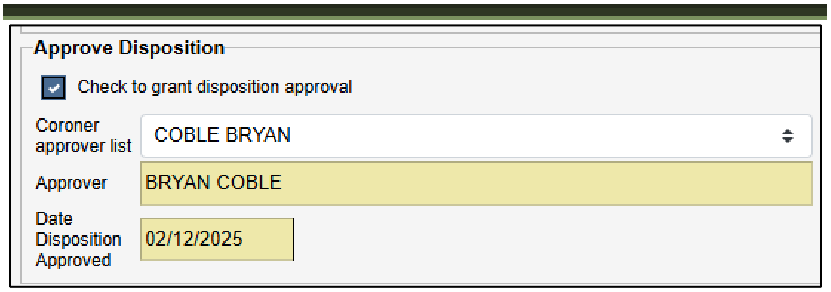
When a funeral home indicates that disposition approval is needed, the case is added to your **Disposition Review** queue.

How to approve disposition

Step 1 Click the **double arrow** next to a record on your **Disposition Review** workload to begin the review process. The selected record opens.



Step 2 Click the **Informant/Disposition/Funeral Home** page tab. In the **Approve Disposition** section, select the **Check to grant disposition approval** checkbox and select the **Approver**.

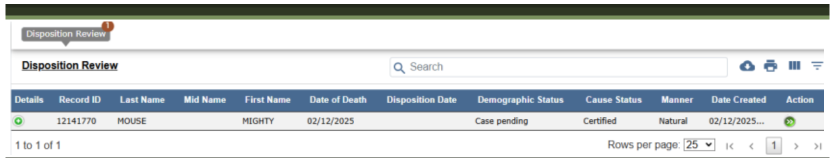


Note: The name of the **Approver** and **Date Disposition** approved are set for you.

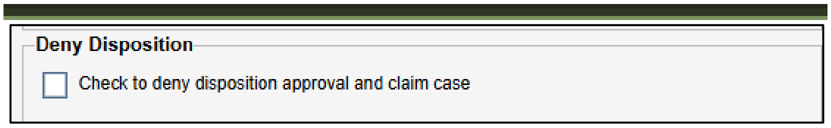
Step 3 Click **Finish** and save the record. The case in no longer on your queue.

How to deny disposition

Step 1 Click the **double arrow** next to a record on your **Disposition Review** queue to begin the review process. The selected record opens.



Step 2 Click the **Informant/Disposition/Funeral Home** page tab. In the **Deny Disposition** section, select the **Check to deny disposition approval and claim case disposition approval** checkbox. You are directed to go to tab 1 to take over the case.

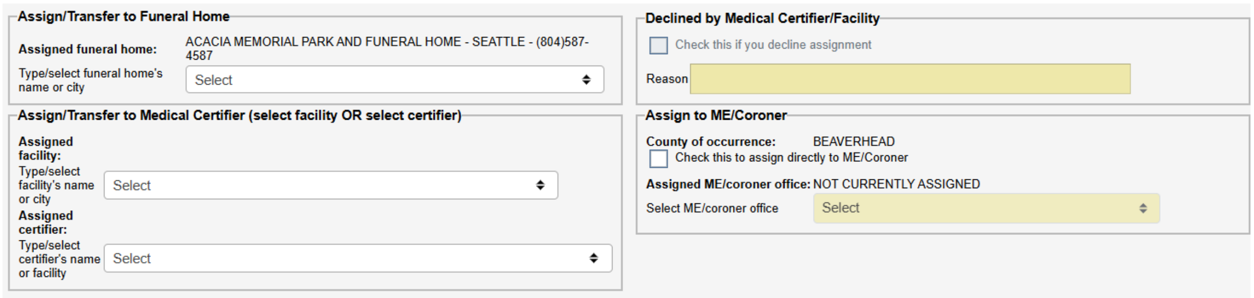


Step 3 Go to Tab 1 to take over the case as explained in "How to take over a case" on page 4-16.

Tip: The record stays on your queue until you take the case.

Case Assignment Page

This page allows you to assign a case to a funeral home, decline an assignment and transfer a case to medical certifier or certifier facility.



How to assign case to a medical facility

Step 1 In the **Assign/Transfer to Medical Certifier** section, start typing the name of the certifier's practice/office or the city where the practice is located. As you type, the list narrows to show entries that contain the text that you type.

Step 2 Select the practice. When you save the record, the case is added to the workload for the practice you selected.

How to assign case to a certifier

Step 1 In the **Assign/Transfer to Medical Certifier** section, start typing the name of the certifier or the name of the practice. As you type, the list narrows to show entries that contain the text that you type.

Step 2 Select the certifier. When you save the record, the case is added to the workload for the certifier's practice

How to decline a case

Step 1 In the **Declined by Medical Certifier/Facility** section, Check the checkbox to decline assignment.

Step 2 Enter the reason you are declining. When you save the record, the case is removed from your workload.

How to assign case to a funeral home

Step 3 In the **Assign/Transfer to Funeral Home** section, start typing the name of the funeral home or the city where the funeral home is located. As you type, the list narrows to show entries that contain the text that you type.

Step 4 Select the funeral home. When you save the record, the case is added to the workload for the funeral home you selected.

Verifications

Creating a case includes a process by which social security information is checked (verified) by the Social Security Administration (SSA). Another type of verification is needed to verify a value you have entered if that value is not consistent with expected values.

SSN verification

After you have entered all information required for the SSN verification process, the application sends this information to the SSA when you save the case. The information that is required consists of the decedent's first and last names, sex, SSN and date of birth as shown on Figure 4-24.

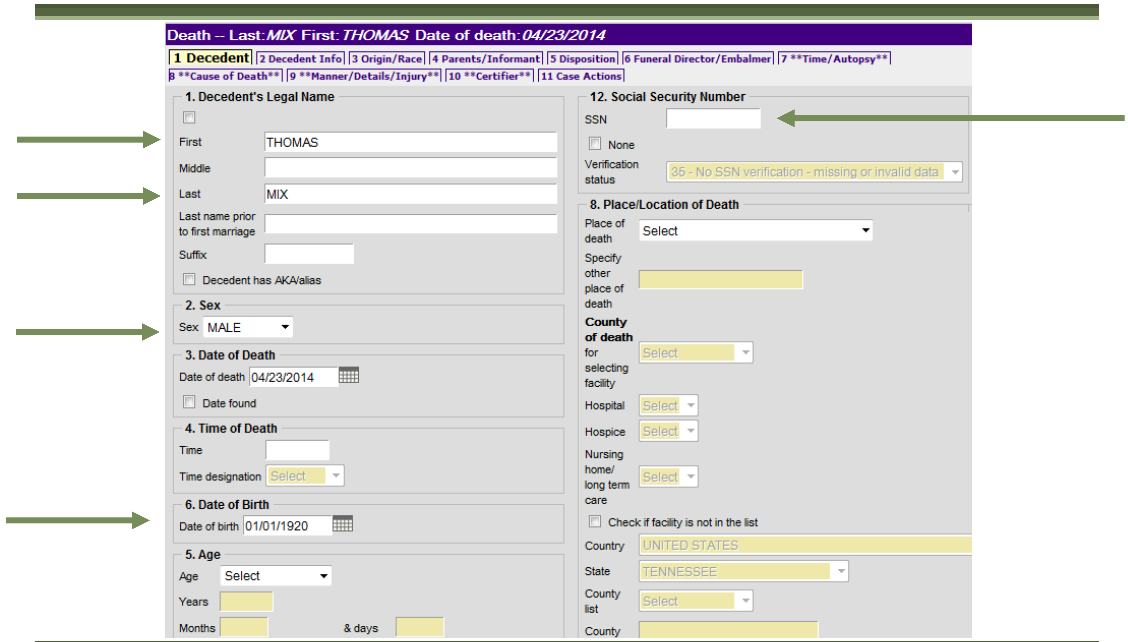


Figure 4-24 ***SSN Verification Fields****: This shows the information that must be entered before the SSN verification process can be initiated.*

Following the verification process the results are displayed in the **Verification status** field (Figure 4-25).

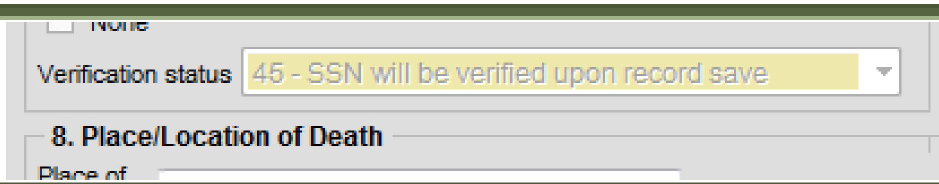


Figure 4-25 SSN Verification Status*: Initially the status indicates that no SSN verification has occurred. Once information has been entered in the SSN verification fields and the record has been saved, the status will be updated.*

Once the SSN is verified you may not change it. Results of the process may indicate the following:

- The verification was successful, and the information provided resulted in a match.
- The SSN provided is not an established number and has never been issued by SSA.
- The name and date of birth matched, but the gender did not.
- The name and gender matched, but the date of birth did not.
- The name matched, but the date of birth and gender did not.
- The name did not match, and the date of birth and gender were not checked.
- Unable to perform verification request. System may be down.

The number of times you can initiate the process is limited to five (5) attempts. You will receive a message if you try to initiate the process after the fifth attempt.

Once the SSN process results in a verified status, you may not change the SSN. You may, however, change any of the other information that was sent for SSN verification (i.e. first name, last name, sex and date of birth).

Information Verification

For certain fields in the demographic information portion of a record your entry may not be in a pre-defined expected range. This may be due to a typographical error or it may the correct value. To minimize the possibility of a typographical error, a message (Figure 4-26) will alert you to the potential problem. In this case you should check your information to be sure that you have entered it in correctly. If incorrect, please enter the correct value. If it is correct, you need to select the verification status in the Verification required list.

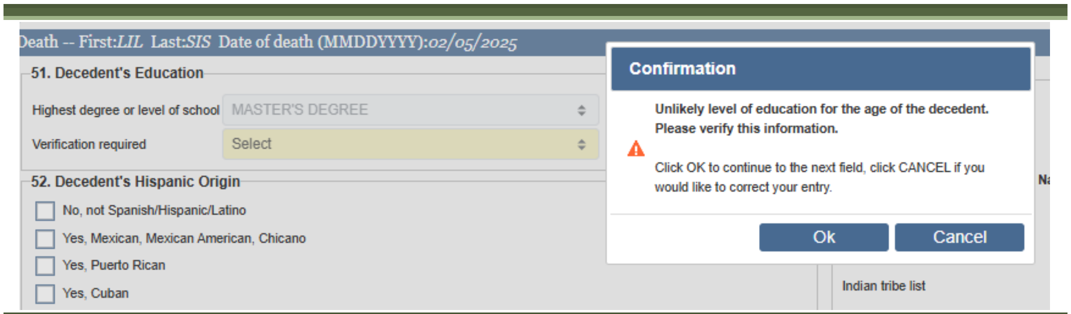


***Figure 4-26 Sample Verification Needed Message**: If you enter or select an out-of-expected range value a message appears asking you to verify the information.*

The Successful Transaction page

When you save a record, you will see the *Successful Transaction* page. This page includes a **Print Confirmation** section that allows you to select and print any or all of the listed documents. The documents that are listed depend on the record and your user role.

The *Successful Transaction* page also includes an **Other Options** section that allows you to return to the record. Depending on the status of you record and you user role, it also includes buttons that initiate additional workflow.

How to print from the Print Confirmation section

The *Successful Transaction* page, the **Print Confirmation** section includes a list of documents and a **Print** button. The default is to print each listed document. If you do not want to print all listed documents, select the corresponding Skip this print option. If you do not want to print at this time do not press the Print button.

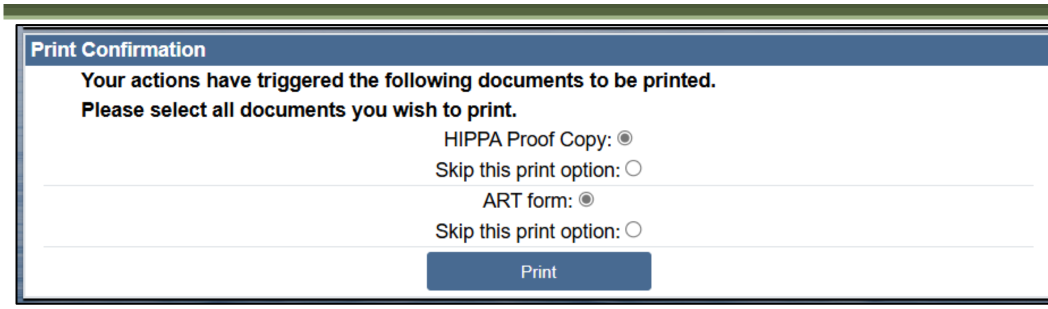


Figure 4-27 Print Confirmation Section of Successful Transaction page*: Begin the process of printing a document from this section.*

Step 1 With the document/s you want to print selected, click the **Print** button.

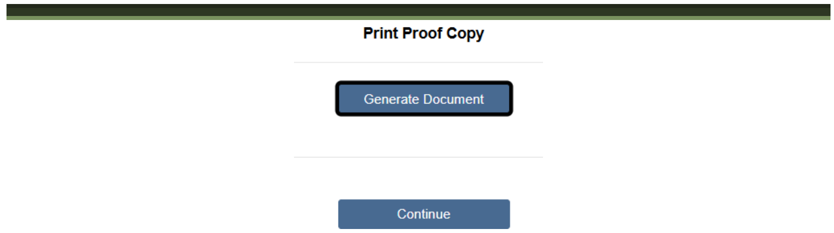


Figure 4-28 Print Confirm page*: Generate the document from here.*

Step 2 Click the **Generate Document** button. The generated document is shown in a new tab in your browser or in Adobe Acrobat where you can view and print the document.

Tip: You can also print documents from the Print option in your menu panel.

Canceling a record

In the rare instance that you create and save a record in error (e.g., a duplicate record), you can do so via the **Cancel** menu option if the decedent's SSN has not been verified and it is not registered. If you are unable to cancel it, contact the state.

How to cancel a record

Step 1 Navigate to **Death → Maintain → Cancel**. The *Death Search Criteria* page opens so that you can search for the record that you want to cancel.

Step 2 Use the *Search* page to find the record you want to correct. When you find the record, click **Details** for that record.

Note: Refer to the chapter called “Viewing & Retrieving Records” if you are unfamiliar with the search process.

Step 3 Once the correct record appears on the *Record Details* page click the **Continue** button at the bottom of the page. You are asked to provide the reason you are deleting this record.

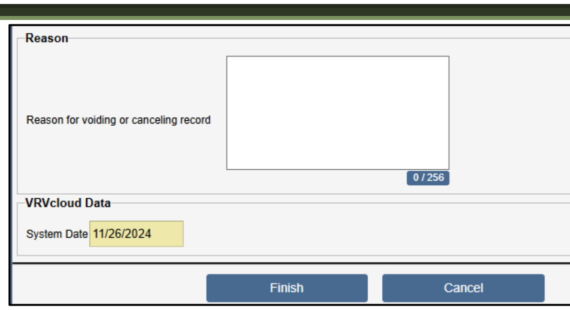


Figure 4-29 Reason for cancelling: *Use this to briefly explain why you need to cancel this record.*

Step 4 Enter your **Reason** to cancel, and then click the **Finish** button. The Successful Transaction page opens allowing you to return to **Main Menu** or **Repeat Task**.

Amending Records

You can amend a registered record. The process for doing so begins when you select the record you want to amend using the **Submit Amendment** option on your menu panel (See “How to submit an amendment” below). The amended record is then available for the state to review and either approve or deny/reject. If it is approved, then it becomes the issuable record. If it is denied/rejected, you can review the reason that it was not approved and correct it (See “How to resubmit an amendment” on page 4-30).

How to submit an amendment

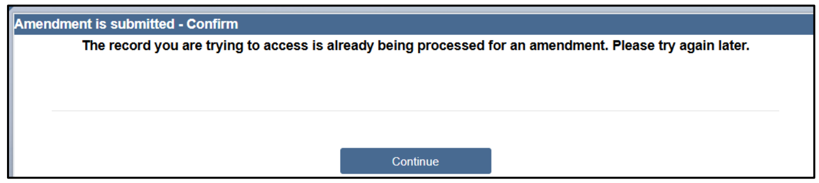
Step 1 Navigate to **Death → Modify → Submit Amendment**. The *Death Search Criteria* page opens so that you can search for the record that you want to amend.

Step 2 Enter your search criteria and click the **Search** button. A search results page displays records that match the criteria you entered

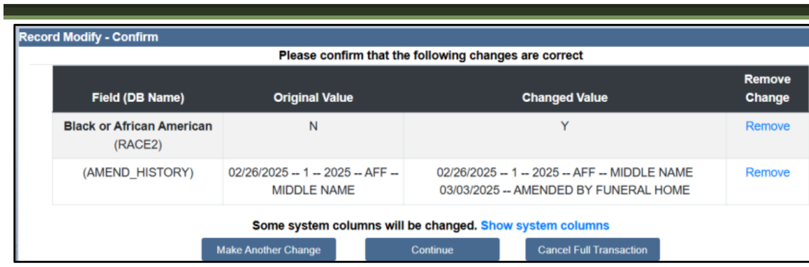
Step 3 Click the **double arrow** next to the record you want to update. The *Record Details* page opens.

Step 4 Click the **Continue** button at the bottom of any *Record Details* page. The selected record opens.

Tip: You cannot begin an amendment to a record if another amendment is already in process. In this case you will see an informative message. Click **Continue** to close the message.



Step 5 Modify the record as needed, and then click the **Finish** button. The *Record Modify Confirm* page opens displaying a list of changes made to the record.


Record Modify - Confirm

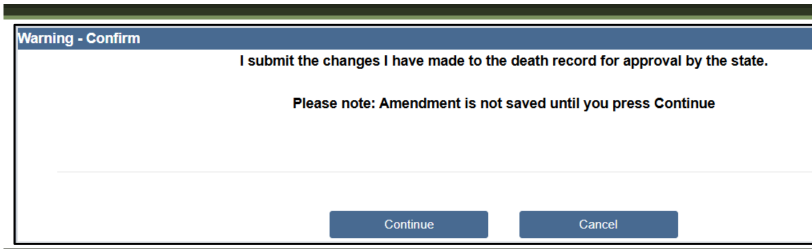
Please confirm that the following changes are correct

Field (DB Name)	Original Value	Changed Value	Remove Change
Black or African American (RACE2)	N	Y	Remove
(AMEND_HISTORY)	02/26/2025 -- 1 -- 2025 -- AFF -- MIDDLE NAME	02/26/2025 -- 1 -- 2025 -- AFF -- MIDDLE NAME 03/03/2025 -- AMENDED BY FUNERAL HOME	Remove

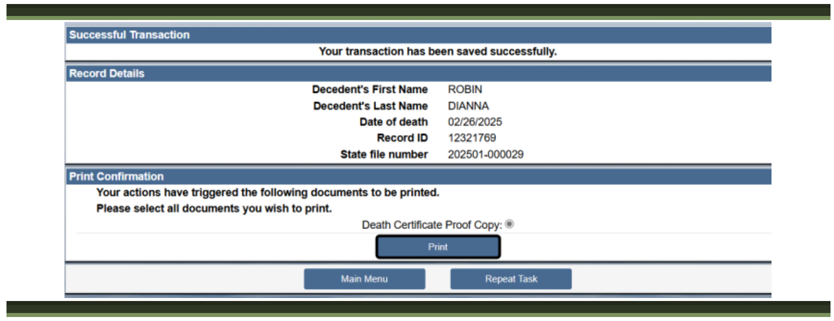
Some system columns will be changed. Show system columns

Make Another Change | Continue | Cancel Full Transaction

Step 6 Ensure that the change you made is listed, and then click **Continue**. You are asked to confirm your amendment submission.



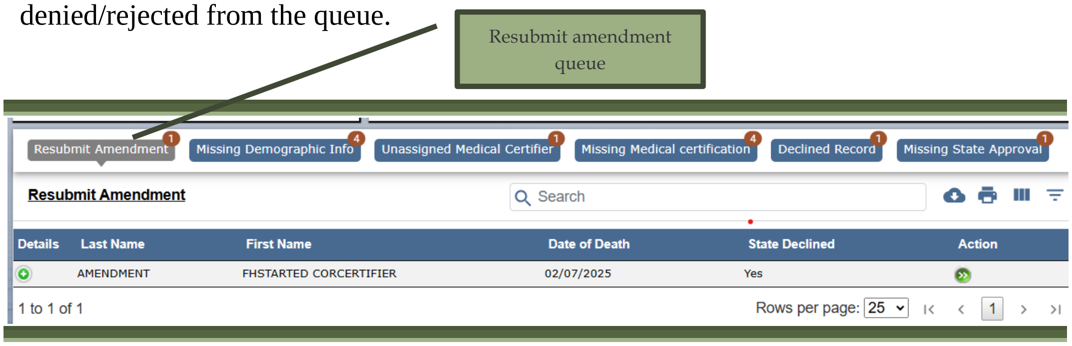
Step 7 Click **Continue**. The *Successful Transaction Page* opens.



Step 8 From here you can print a document from the **Print Confirmation** section. (You can also print from the Print option of the menu panel.) Click **Main Menu** to return to your **Dashboard**.

How to resubmit an amendment

If the state denies/rejects an amendment that you submitted, you will see it on your **Resubmit Amendment** queue. You can open the amendment and see why it was denied/rejected from the queue.

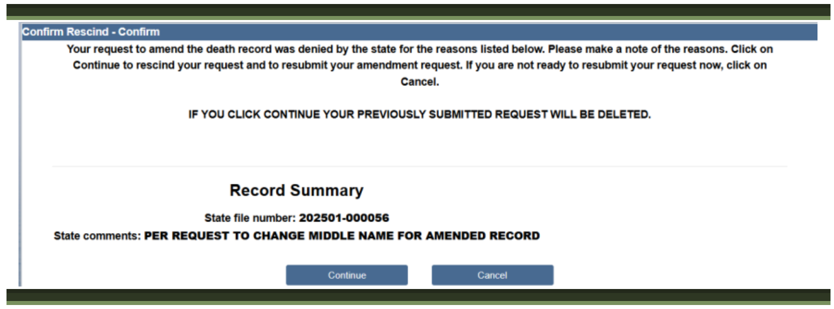


Step 1 Click the **double arrow** for the record on your **Resubmit Amendment** queue that you want to correct. This opens the *Record Details*.

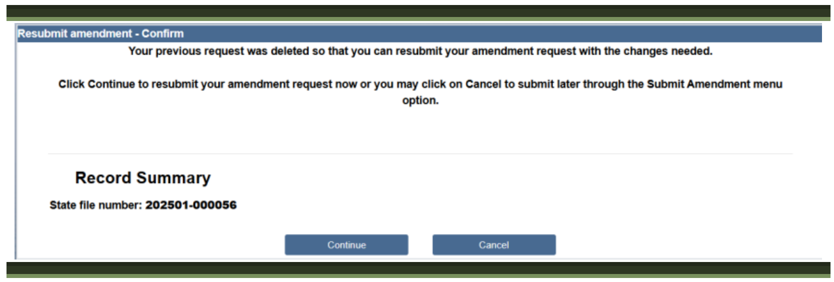
Tip: You can also use the **Resubmit Amendment** option on the menu panel to find the rejected/denied record.

Step 2 Click **Continue** on any *Record Details* tab. The *Confirm Rescind - Confirm* page opens.

Step 3 The *Confirm Rescind -Confirm* page provides instructions on how to proceed. When you proceed to resubmit the amendment, you will need to make sure you that you make all the changes needed that were rescinded, so you should make a note of the **comments** in the **Record Summary** section

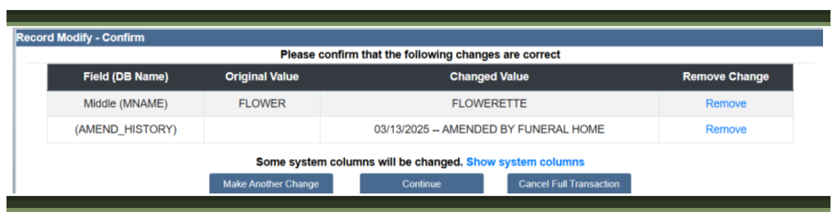


Step 4 Click **Continue**. A second confirmation window opens.



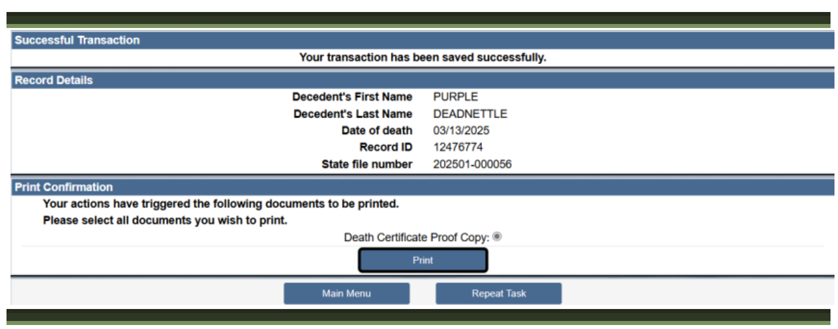
Step 5 Click **Continue** to open the record.

Step 6 Modify the record as needed, and then click the **Finish** button. The *Record Modify Confirm* page opens displaying a list of changes made to the record.



Step 7 Ensure that the change you made is listed, and then click **Continue**. The *Successful Transaction Page* opens.

Notice the State comments below the State File number.



Step 8 From here you can print a document from the **Print Confirmation** section. (You can also print from the Print option of the menu panel.) Click **Main Menu** to return to your **Dashboard**.

Chapter

5

Viewing & Retrieving Records

VERS

5 Viewing & Retrieving Records

In this chapter

You can invoke a search to find a record. For example, you may want to view the details of the record or print a document related to one of your records. This chapter introduces you to the **VERS** search feature. Specifically, this chapter contains the following topics:

Note: Not all functions and fields discussed in this chapter are available to all users.

Working with saved records

You may need to view or work with a record that has already been entered for a variety of reasons, depending on your user role, including the following:

- Printing documents
- Viewing record details
- Updating records

Before you can complete any of the above from a menu option you must first retrieve the record. Note that you can also update a record by selecting the record off of your unfinished record queue.

How to search for records

When you want to retrieve an existing record, you must first find and display it. You use a **VERS** search page to help find the record. The information you enter on the *Search* page is referred to as the search criteria.

If the search page includes a name and you use a common last name, such as Smith, that may return many records, you should also enter additional search criteria such as the date of the event to narrow the search.

To search for a record:

Step 1 Navigate to the desired menu point (e.g., **Death → Print**, **Maintain**, **Update, Search**, etc.) If necessary, select the desired option, such as Proof Copy. The corresponding *Search* page appears.

The fields that you can use for searching depend on your location and the type of search you have selected.

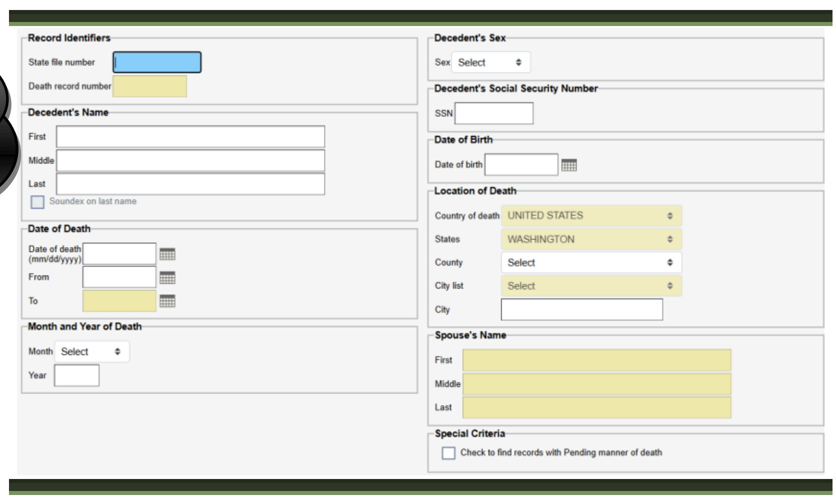


Figure 5-1 Sample Search Page (Death)*: This allows you to enter information to help find a specific record.*

Step 2 Enter additional search criteria to help find the record. Most types of searches (updating, printing, etc.) have their own set of fields and search criteria requirements that must be used for the search.

Step 3 Click the **Search** button. If you need to add information a message will appear when you click **Search**. If you see such a message, add/modify your criteria as specified and click the **Search** button again. The screen shot below shows a list of records that matched the search criteria that was entered.

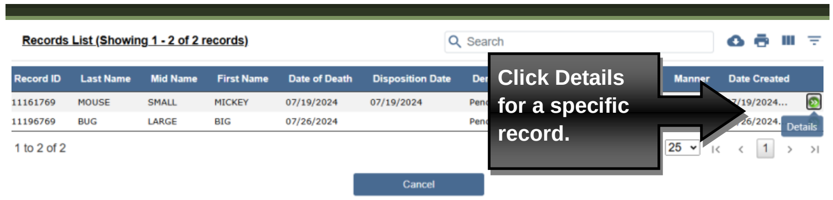


Figure 5-2 Sample Search Results: Find your record and then click its Details link to continue your work.

Tip: If no record appears in the list or if you do not see the record you want, you can click **Cancel** to return to the *Search* page where you can refine your search criteria.

Step 4 Click the **Details** link in the right-hand column for a specific record to view record details and confirm that you have selected the correct one. The **Record Details** page appears.

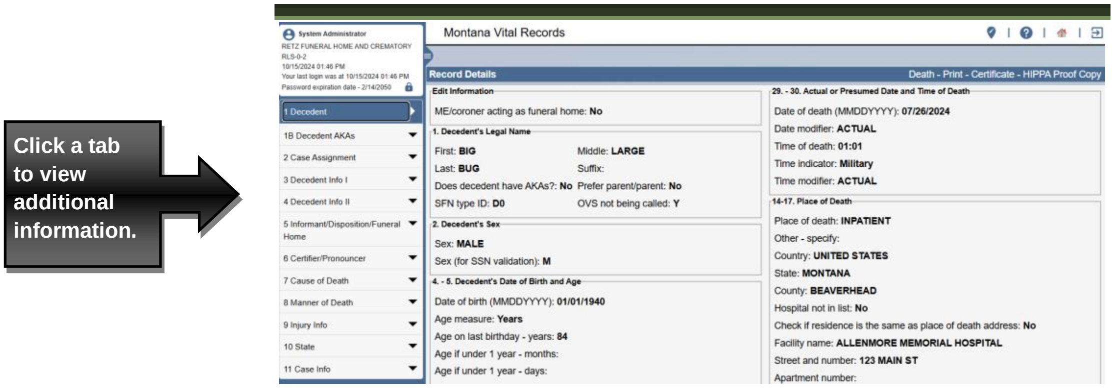


Figure 5-3 Sample Record Details page (first tab): Use the tabs to review the record details.

Step 5 If you determine that this is the record you want, click the **Continue** button at the bottom of any page (or press your **Enter** key). The corresponding procedure executes (e.g., the record opens so that you can add or edit information, or the print process begins or you return to the main menu).

Notes: If you clicked the **Search** menu option, you will be able to view the record details. When you click the **Continue** button, there is no opportunity to modify the record.

If you determine that this is not the record you want or if you do not want to continue, click the **Cancel** button to return to the *Records List* page.

Chapter

6

Printing

VERS

6 Printing

In this chapter

This chapter provides information about printing documents from the **Print** menu option.

Note: Not all functions and fields discussed in this chapter are available to all users.

Overview

Most documents you can print are generated as PDFs. Newer versions of most browsers (e.g., Firefox, Edge, and Chrome) have their own PDF readers. If you are using one of these browsers, your document will open in a new tab of your browser. If this does not happen, it will open in Adobe Acrobat, which must be installed in addition to your browser.

How to print from your browser

If a new tab opens in your browser when you select to generate a document, you can print it directly from the tab that is showing the document. Click on the **printer icon** or press **Ctrl + P** on your keyboard to open your print dialog box and print to the selected printer.

How to print via Adobe Acrobat

Anytime you begin a print job from a browser that does not have its own PDF reader, you should see the document displayed in the Acrobat window. Once displayed, you can print it.

Note: If you encounter print problems with Adobe Reader, please check the *Troubleshooting* section in the "Technical Support" chapter or contact your help desk.

To print via Acrobat:

Step 1 When you begin a print process that uses Adobe Acrobat, the **VERS** application may display a *File Download* dialog box. If the file (i.e., document) is displayed in Acrobat without first displaying the *File Download* dialog box, skip to Step 3.

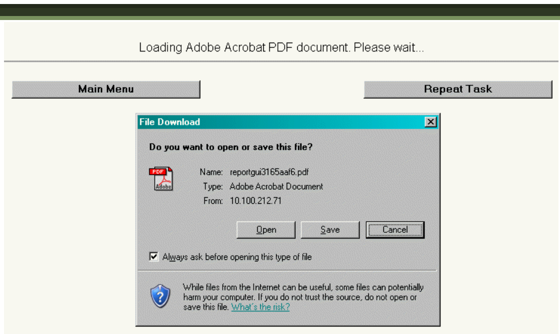


Figure 6-1 File Download Dialog Box*: It may take a moment for the document to load. When the File Download dialog box opens, you can open the file, save the file or cancel the process from this box.*

Step 2 To allow you to view the file and then print it click the **Open** button. The generated file is displayed in Acrobat.

Step 3 Once the document is displayed select **File → Print** from the Adobe Acrobat menu bar or the **Printer icon** on the toolbar. The *Print* dialog box appears.

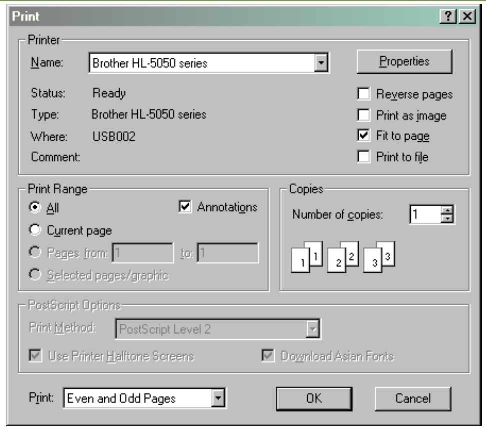


***Figure 6-2 Sample Adobe Print Options**: From here you can specify your print settings.*

Step 4 Specify your print/printer information in the *Print* dialog box, and then click the **OK** button. The document prints to the selected printer.

Step 5 Close Adobe Acrobat.

Notes: Every printer is different, so if you must feed the paper back into the printer to print double sided, make sure the paper is loaded correctly.

Do not close Adobe Acrobat until you have a good print.

When closing Adobe Acrobat, you should remain within the **VERS** system. If this is not the case and you are taken to the log on page, contact your help desk to discuss your PC settings.

Your print menu

Some types of documents may be printed when saving a record (e.g. HIPPA Proof Copy). These documents may also be printed using the **Print** menu option in case there was a printing problem when printing during the save process. Some documents associated with a specific record can only be printed from the Print menu. Because these documents are record-specific you must find the record. See “How to print record-specific documents”.

You also have the option to print blank forms, such as the Full certificate worksheet. no need to find a specific record. These forms can be completed manually as explained in “How to print blank forms”.

Finally, you have the option to print reports designed for your location. See “How to print reports” for information about this process.

How to print record-specific documents

Step 1 From the Main menu, click **Death → Print → <name of document>**. The *Search* page appears.

Step 2 Use the *Search* page to find the desired record. See the chapter called “Viewing & Retrieving Records” if you need more information.

Step 3 Click **Details** for the record you want to print.

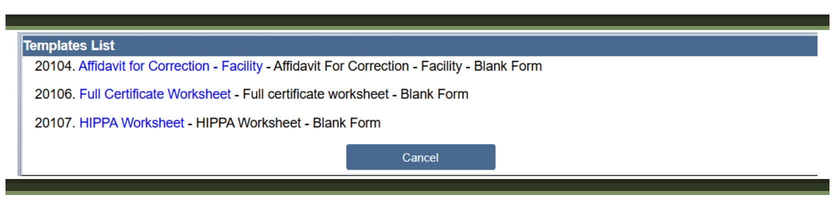
Step 4 Once the correct record appears on the *Record Detail* page, click the **Continue** button at the bottom of the page

Step 5 Click **Generate Document**. The document opens on a new tab in your browser or is sent to Adobe Acrobat from which you can print it.

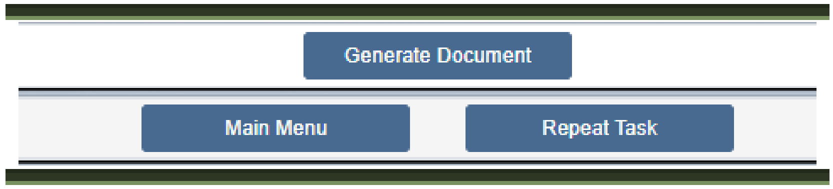
Step 6 After you print the document, click **Main Menu** or **Repeat Task** depending on what you want to do next.

How to print blank forms

Step 1 From the Main menu, click **Death → Print → Blank Forms** to see a list of available forms such as shown below.



Step 2 Click on the form you want to print.

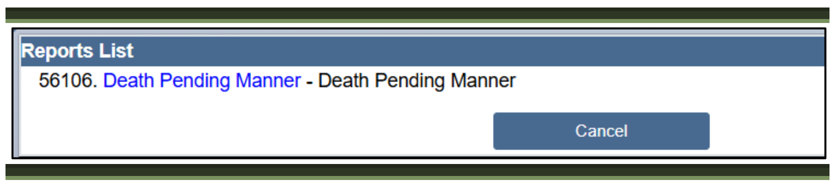


Step 3 Click **Generate Document**. The blank form opens on a new tab in your browser or is sent to Adobe Acrobat from which you can print it.

Step 4 After you print the document, click **Main Menu** or **Repeat Task** depending on what you want to do next.

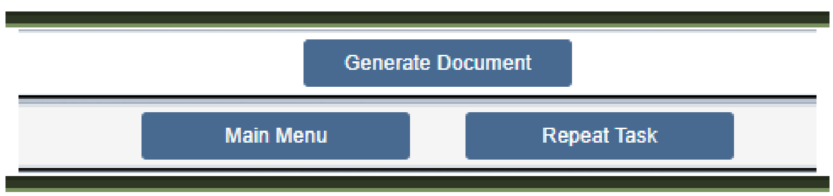
How to print reports

Step 1 From the Main menu, click **Death → Print → Reports** to see a list of available reports such as shown below.



Step 2 Click on the report you want to print. Depending on the report you may be asked to add some parameters to restrict what is included in the report as shown below.

Step 3 Add/modify the parameters as needed, and then click Continue



Step 4 Click **Generate Document** to download the report. Depending on the report and your browser, you may see that the report has been downloaded. Open the file. The generated document is downloaded. Open the download to view and print the report.