Version 1.2

Medical Certifier User Guide

MISSOURI ELECTRONIC VITAL RECORDS

Medical Certifier User Guide

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1 Getting Started

In This Chapter

This chapter explains how to get into the **MoEVR** application and provides some general information about what you will see when you get there. In doing this references may be made to multiple modules to best demonstrate application features. Specifically, this chapter contains the following topics:

First Things First

This section explains some features of this User Guide. It also explains how to navigate to the **MoEVR** website.

About This User Guide

All procedures in this guide are presented as numbered steps. They tell you how to open the page or form 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 form 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 a form. 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.

How To Access The MoEVR Internet Site

To access the main logon page at your **MoEVR** Website if a shortcut has not already been set up for you:

Step 1 Open your internal browser (For most users this will be Internet Explorer, which must be version 6.026 or higher).

Step 2 Enter the precise, current Web location for the **MoEVR** Website into the URL field on your browser window. This field is generally at the top of the page and is labeled "Address." If necessary you can contact your **MoEVR** help desk.

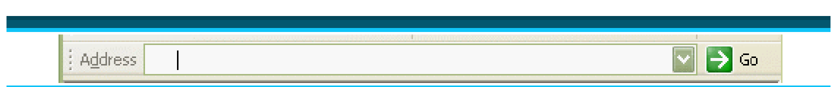


Figure 1-1 Sample Browser Address Bar*: Enter the address or location for the MoEVR Website here.*

Step 3 Click **Go** to the right of where you entered the address for the **MoEVR** application or press the **Enter** key on your keyboard. The

Welcome page appears. This page is explained in “The MoEVR Welcome Page” on page 1-4.

You can use any of the following methods to get to the **MoEVR** *Welcome* page after you successfully open the page the first time.

- Use a direct shortcut to the **MoEVR** application on your computer’s desktop. Instructions can be supplied by your **MoEVR** help desk if you do not know how to do this.
- Type the **MoEVR** Internet address manually for each **MoEVR** session, then click **Go** or press the **Enter** key on your keyboard.
- Load and launch the previously entered **MoEVR** address from the drop-down list of recently visited sites (**Address** field).
- Add the address as a bookmark in your list of favorites. To do this if you are using Internet Explorer:
  1. Open the *Welcome* page.
  2. Click **Favorites** on the Internet Explorer menu bar.
  3. Select **Add to Favorites…** to open the corresponding dialog box.
  4. Edit the **Name** if you want and then click the **OK** button.
  5. Click **Favorites** again and verify that the name appears in the list.

The MoEVR Welcome Page

When you go to the **MoEVR** Internet site, you are at the *Welcome* page.

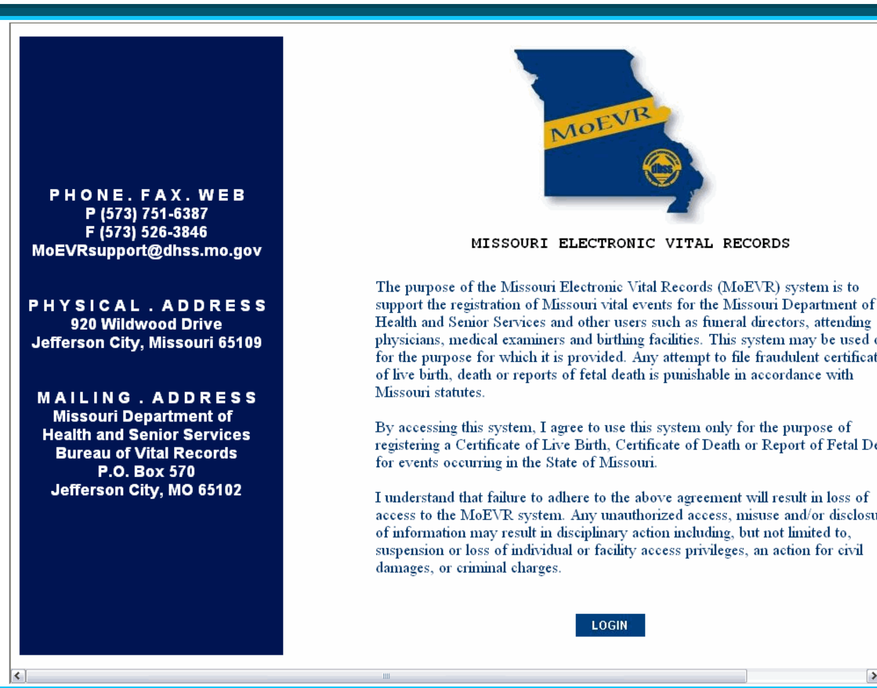


***Figure 1-2 MoEVR Welcome Page**: This page provides option to login. It also provides important contact information.*

Logging In

When you go to the **MoEVR** Internet site, you are at the *Welcome* page. You begin the login process from this page. The login process depends on whether you are logging in for the first time. If you are logging in for the first time, follow the instructions in "How To Log Into The MoEVR Application (First Time" on page 1-5.

If you have logged in before, you will not have to re-enter your secret question and answer. Please refer to "How To Log Into The MoEVR Application (After First Time" on page 1-7 for this procedure.

When you attempt to log in, the system informs you if your login was unsuccessful. If this happens, you may try again. Please be advised that you will be locked out if your login attempt continues to fail. The number of attempts allowed before you are locked out has been set by the system administrator. Please refer to the chapter "Technical Support" if you are locked out.

How To Log Into The MoEVR Application (First Time)

Step 1 On the **MoEVR** welcome page (Figure 1-2), click the **Login** button. The *Login* page appears.

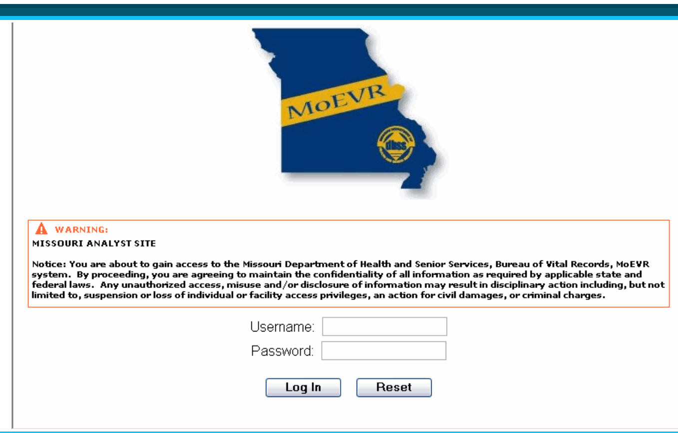


Figure 1-3 Login Page*: This is where you will enter your username and password so that you can gain access to the application.*

Step 2 Enter your **Username**.

Step 3 Enter your **Password**.

Notes: If you have not received your user name and password, please contact your Local System Administrator.

Username and **Password** are case sensitive: Whether you enter a capital letter or a lower case can determine your login success. You may want to ensure that your caps lock is off and number lock is off before you begin.

Step 4 Click the **Log In** button. You are informed that your password has expired. You must define your new password to continue.

Figure 1-4 Password Has Expired Page*: This is where you will create your own password.*

Step 5 Enter your **Original (Current) Password**. This is the one that was assigned to you. Press your **Tab** key.

Step 6 Enter your **New Password** and press your **Tab** key.

Notes: **Username** and **Password** are case sensitive: Whether you enter a capital letter or a lower case can determine your login success.

If your password does not meet certain requirements, such as length, you will be informed as to the problem. If this happens, read the message and redefine your password. See "Password Criteria" on page 1-7 for more information.

Step 7 **Retype** your **New Password** in the **Confirm New Password** textbox to verify that you entered what you meant to enter.

Step 8 Click the **Continue** button. The login process continues. If you work for more than one location, you are asked to select a location for this session (Figure 1-5). In this case continue with the next step.

If you are assigned to a single location, the Main page (Figure 1-8) appears without first selecting your location.

Figure 1-5 Sample Select your Location Page*: If you belong to more than one location, select the location you should use for the current MoEVR session.*

Step 9 If the *Select your location* page appears, click the location you want to use for this **MoEVR** session. The Main page (Figure 1-8) appears.

Password Criteria

The **MoEVR** system will only accept valid passwords. The criteria for a valid **MoEVR** password are as follows:

- Minimum of eight characters and maximum of twelve characters consisting of **at least one** of **each** of the following:
  - Upper case character
  - Lower case character
  - Number
  - Special character (e.g., &, *, etc.)
- Cannot be the same as any of your previous ten passwords
- Cannot be the same as your username

How To Log Into The MoEVR Application (After First Time)

Note: You should follow this procedure only if you logged into the **MoEVR** system previously and you are now using a password which you created for yourself. If you are using a password that has been temporarily assigned to you, follow the instructions in "How To Log Into The MoEVR Application (First Time" on page 1-5.

Step 1 On the **MoEVR** welcome page (Figure 1-2), click the **Log In** button. The *Login* page appears.

***Figure 1-6 Login Page**: This is where you will enter your username and password so that you can gain access to the application.*

Step 2 Enter your **Username**.

Step 3 Enter your **Password**.

Note: **Username** and **Password** are case sensitive: Whether you enter a capital letter or a lower case can determine your login success.

Step 4 Click the **Log In** button. If you are assigned to only one location, you will see the Main page (Figure 1-8) which ends the logon process.

If you are assigned to multiple locations, you are asked to select a location for this session (Figure 1-5). Click the location you want to use for this **MoEVR** session. The Main page (Figure 1-8) appears.

Changing Your Password

It is important that you know how to change your password. You will be forced to change your initial password to one of your own choice the first time you log in. You may also be asked to or may want to change your password at other times as well.

To change your password:

Step 1 From the Main menu click **System → Change Password**. The *Modify a Password* page appears.

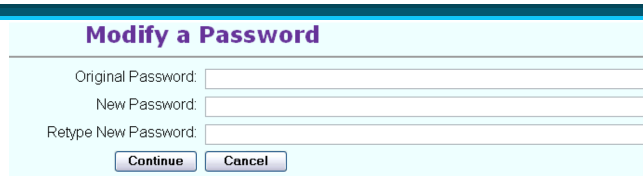


Figure 1-7 Modify a Password Form*: Use this form to create your new password.*

Step 2 Enter your existing password in the **Original Password** box.

Step 3 Enter your new password in the **New Password** text box.

Notes: **Username** and **Password** are case sensitive: Whether you enter a capital letter or a lower case can determine your login success.

If your password does not meet certain requirements, such as length, you will be informed as to the problem. If this happens, read the message and redefine your password. See "Password Criteria" on page 1-7 for more information.

Step 4 Re-enter your new password in the **Retype New Password** text box.

Note: For problems with passwords, you should contact your **MoEVR** help desk.

Step 5 Click the **Continue** button. You are asked to confirm your request.

Step 6 Click the **Continue** button. You are informed of a successful transaction.

Navigating Pages And Menus

The **MoEVR** application uses common application and data entry conventions and should be easy for anyone to navigate. The Main Menu page and all module menus with sub-menu items contain these common page elements.

Common Page Elements

The following figure shows the location of the common **MoEVR** page elements.

Note: Not all functions and menu items discussed in this User Guide are available to all users.

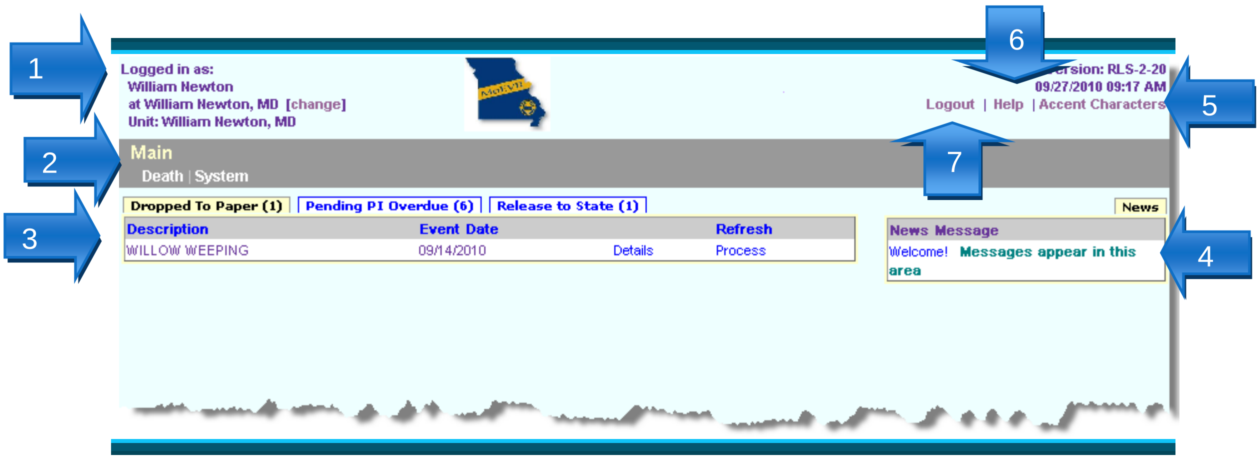


***Figure 1-8 Sample MoEVR Main Page**: Each labeled element provides information and/or functionality.*

1. Logged In As

Your name and the location where you are currently logged appear in the upper left corner of every **MoEVR** page which contains a menu. A single user may be assigned to multiple locations. Your current login group and location control the menu options and editing privileges available to you. If you are set up to work from multiple locations, you can change your location by clicking **Change** next to your current location to return to the *Select Your Location* page (Figure 1-5).

2. Menu/History Bar

A menu/history bar appears in a horizontal, page-width bar just below the **MoEVR** logo. This bar typically consists of two lines of information.

- The top line shows the history, or path, that was followed to get to your current page location separated by hyphens.
- The lower line shows the options available at this location, separated by pipe stems (|).

For example:

Main – Death
Create Case | Update Case | Search | Print

Note: Only options that you are authorized to access appear on your menu bar.

When the lowest level has been reached and no further options are available, the menu bar will disappear. For example, after selecting the **Death → Print** option, your menu/history bar may show:

Main – Death – Print
Drop to Paper | Office Copy | Cremation Letter | Reports

At this point if you click on any item (other than Reports), a search page will open and the only the top line of the menu bar will be visible.

Whenever the menu bar is displayed showing the items you have selected, you can navigate up (or back) to a higher menu level simply by clicking on a previous item in the history path; for example, from the location above, clicking once on the word **Death** returns you to the Death menu. Clicking on the word **Main** returns you to the Main Menu.

3. To Do Queue (TDQ)

The **MoEVR** application provides access to the workload (i.e., To do queue) assigned to users at their current login location for processing. The types of queues depend on who is logged into the system. Additional information may be found in the "To Do Queue" chapter. The following shows a sample TDQ at a funeral home location.

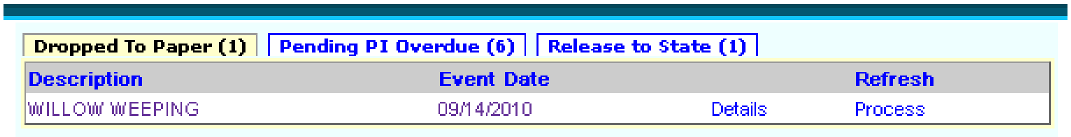


Figure 1-9 Sample To Do Queue: This is showing the Overdue queue at a funeral home with 4 cases listed. *From your TDQ you can view additional information about a record, change the sort order of the cases, or process them. Once processing is complete the case is removed from the list.*

4. News Messages

A current news messages list appears on all main module menu pages. This list contains *System News* for all **MoEVR** users as well as *Group-Specific Messages*.

- **System News** typically lists items on system upgrades, planned shutdown/back-up times, etc.
- **Messages for "Group Name"** lists news message items applicable to your current login group. This is not location specific and messages will be seen by all users with access to that group.

5. Accent Characters

Some of the information you will enter into a form may contain accented characters that are not readily added from your keyboard. The **Accent Characters** feature provides a list of these characters that you use when entering a record.

Tip: To have this list readily available, right-click in the *Accented Characters List* window and select **Add to favorites…**.

To add an accent character:

Step 1 Click **Accent Characters** in the upper right corner of the Main page. A list of available accent characters opens.

Figure 1-10 Available Accent Characters*: These are the accented characters that you can use when entering information.*

Step 2 Open the form you need to add the record.

Step 3 When you are ready to include an accented character on the form, highlight the desired character by click-dragging your cursor over the character or double clicking the character to select it.

Step 4 When you have highlighted the character, press your **Ctrl + C** keys (or use the right-click method) to **Copy** the character.

Step 5 Return to the form and place the cursor where you want to insert the character.

Step 6 Press your **Ctrl + V** keys (or use the right-click method) to **Paste** the character where the cursor is.

Tip: You can also use the drag and drop method: Highlight the character, and then with the mouse button still depressed, drag the cursor to where you want to drop the character and release the mouse button.

6. Help Function

Next to the logout function in the upper right corner of the **MoEVR** Main page is a **Help** link to display the Users Guide online via Adobe Acrobat. You can use the *Table of Contents*, *Index* or the Acrobat search feature to find specific information.

7. Logout Function

In the upper right hand corner of the **MoEVR** Main page, there is a **Logout** option. Once you've clicked it, the system logs you out.

Tips: You should always log out before leaving your work area, even if only for a moment!

If you are entering a case, you must return to the **MoEVR** Main page to access the **Logout** option.

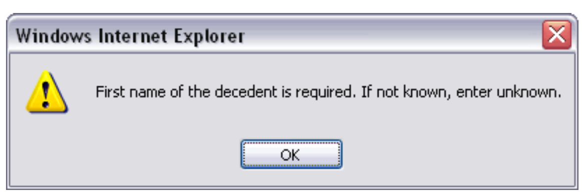
Security Alerts! After you logout, you should completely exit by closing all open browser windows.

If you do not log out, **MoEVR** may "time out." Please refer to "System Inactivity Limits" on page 1-16 for more information about this feature.

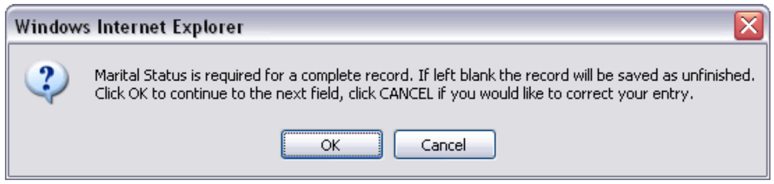
Application Conventions

To make it easier for you to enter cases, the **MoEVR** 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 **MoEVR** application uses many messages to help guide you through your data entry. These messages may appear at the top of a data-entry form or as a separate page or window. For examples:
    - ♦ Some fields are required; that is, you must enter information in required fields before you can move to another field or save a case. If you try to skip these fields, messages will alert you to the problem. The following shows this type of message.



- ♦ If you cannot save a case as a finished case, a message will tell you why it cannot be saved. The following shows this type of message.



- **Tab Order**: As you enter information on any form 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**: Form pages for the different **MoEVR** modules are generally listed from left to right and top to bottom in a bar below the menu bar.
- **Link Identification**: When you move your cursor over any link option on a **MoEVR** page, your cursor changes to a hand to help you identify the option as a link.
- **Cancel Button**: As with most applications, the **MoEVR** 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 in the database.

Data Entry Pages

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

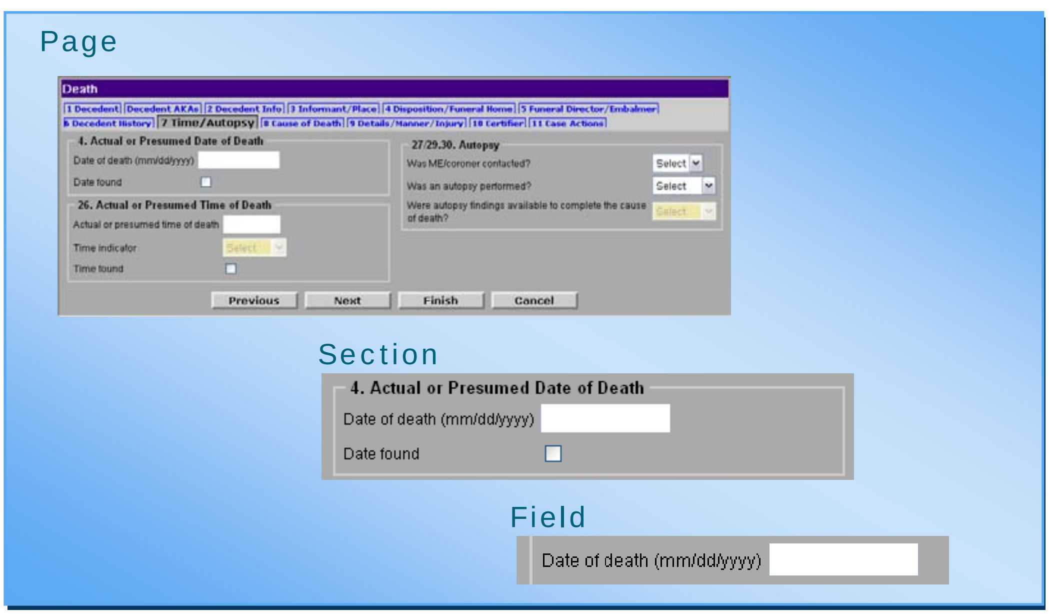


***Figure 1-11 Page - Section - Field Relationships**: A form may contain multiple pages; each page may contain multiple sections; and each section may contain multiple fields.*

Page Tips

Note the following when entering information in the **MoEVR** forms:

- You can open a page by clicking the page's name (blue tab) at the top of the form or by clicking the **Next** button to move forward through the pages or the **Previous** button to move back a page.
- Your cursor changes to a hand whenever it is over a link.
- 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.

Data Entry Tips

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

- Press your **End** key to go to the bottom of a page or list; similarly, press your **Page Down** key to move partially down a page.
- Press your **Home** key to go to the top of a page; similarly, press your **Page Up** key to move partially up a page.
- 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 + 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 + 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 + ↓** keys to "open" a list box.
- Press your **F5** key if you pressed your **Backspace** or **Enter** key at the wrong time and lost your **MoEVR** page.

Help/Field Definitions

If you are unsure as to what information goes in a particular field on a registration, 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.

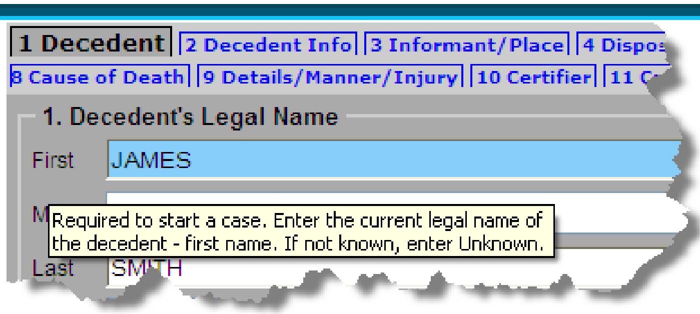


Figure 1-12 Sample Field Definition*: This shows the hover text or tool tips for starting a death case. It appears when you move the mouse over the field label (First).*

Duplicate Record Alert

Whenever you start a case, 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 the system finds such a record, a potential duplicate record warning will be displayed similar to the one shown below.

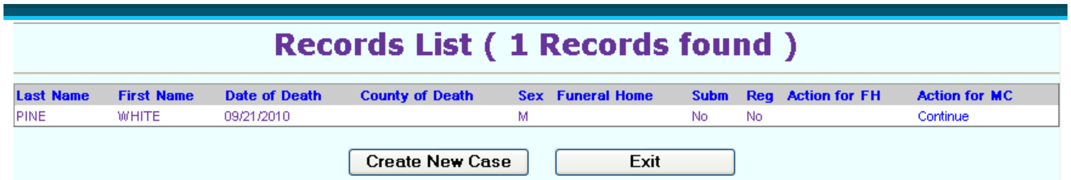


Figure 1-13 Sample Duplicate Information Warning*: This message informs you that the case you are entering may already exist. If it is already in the system, you do not need to re-enter it.*

How to proceed if duplicate records are listed:

Step 1 Review the details shown for each listed record by clicking the **Details** link.

Step 2 If you determine that the case you are entering is not a duplicate, as will be the case most of the time, you may continue adding information after clicking the **Create New Case** button.

Or

If you determine that it has already been entered (i.e., it is a duplicate case), you may cancel the new case and return to the Main menu page by clicking the **Exit** button. The case you are starting will **not** be saved if you click on this button.

Or

Click **Continue** in the **Action for FH** or **Action for MC** column to continue work on this case.

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 **MoEVR** Main page as explained in "7. Logout Function" on page 1-12.

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 **MoEVR** 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 **MoEVR** 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 1-14).

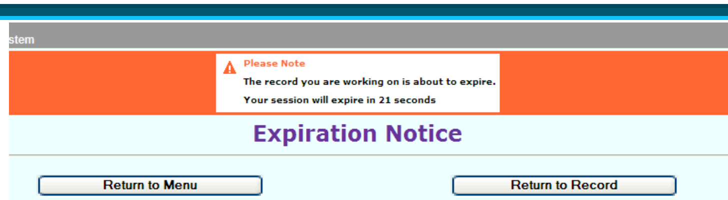


Figure 1-14 Sample MoEVR Expiration Notice*: This alerts you that you are about to be logged out of the system and allows you to continue your current task.*

If you notice the above **MoEVR** *Inactivity Timeout* message and want to continue working in the **MoEVR** application, click the **Continue** button. If you miss this opportunity, the application will close the open record automatically (Figure 1-15). If you miss this opportunity to keep the application open, you will have to log back in to resume work in the **MoEVR** system.

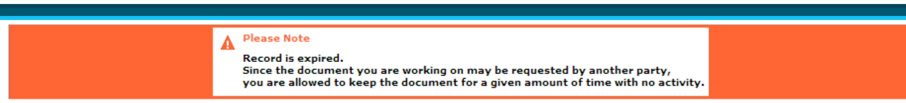


Figure 1-15 Sample MoEVR Inactivity Timeout Message: This alerts you that your session timed out.

Chapter

2

Technical Support

MoEVR

2 Technical Support

In This Chapter

This chapter explains what to do if you encounter problems when using the **MoEVR** application.

The “Troubleshooting” section lists some commonly reported problems and how to resolve them yourself. If you do not find your problem listed or if you are still having problems after trying the recommended resolution, you should refer to “About Technical Support For MoEVR” starting on page 2-3 or contact your **MoEVR** help desk.

P (573) 751-6387
F (573) 526-3846
MoEVRsupport@dhss.mo.gov

Specifically this chapter contains the following topics.

Technical Requirements

The **MoEVR** application is designed for viewing and use on a standard high-resolution colour 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 **MoEVR** application and print your documents you need to have downloaded/installed the following:

1. Internet Explorer version 6.026 or higher
2. Adobe Acrobat version 8.0 or higher (needed if you will be printing documents)

Both of these are available at no cost via the internet. If not installed and you are comfortable with installing from the internet, please refer to “Installing Software” on page 2-3. If you need more information or guidance, please contact your **MoEVR** help desk.

Installing Software

If you do not have an Internet browser and the Adobe Acrobat reader installed or if you do not have the correct versions installed, you can download both of these from the Internet. If you need to install Internet Explorer, please refer to “How To Install Internet Explorer Browser” below. Internet Explorer is the recommended browser. If you need to install Adobe Acrobat reader, please refer to “How To Install Adobe Acrobat” below. Adobe Acrobat is needed to print documents.

How To Install Internet Explorer Browser

If you do not have a browser installed or if you want to use Internet Explorer (IE), you may install it from the following internet address: http://www.microsoft.com/windows/downloads/ie/getitnow.mspx.

Follow the download instructions and contact the **MoEVR** support if you experience problems.

How To Install Adobe Acrobat Reader

If you do not have Adobe Acrobat Reader installed on your computer, you may find and install it from the Adobe website: http://get.adobe.com/reader/.

Follow the download instructions and contact the **MoEVR** support if you experience problems.

About Technical Support For MoEVR

Your **MoEVR** help desk team can help you in a variety of areas. You can help them out 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. If this happens, you should first try to find the problem in "Troubleshooting" on page 2-5. If not listed or if you still have problems, you should contact your local IT Support or your **MoEVR** help desk. Problems can fall into the following categories:

- Connectivity – These problems prevent you from accessing the **MoEVR**. Entry page or from successfully logging into the **MoEVR** 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 **MoEVR** 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 case 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 **MoEVR** 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 MoEVR Technical Support

If you encounter a problem that requires technical support, you should contact your **MoEVR** 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 will be asked to 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 **MoEVR**)
- System information
  - Browser name and version
  - Which **MoEVR** 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?

Troubleshooting

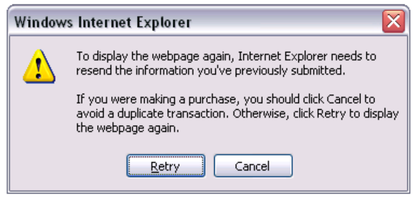
If you have problems with the **MoEVR** application, see if the problem is listed below. Note that the problems have been grouped according to the type of problem.

Logging In

Description	Suggested Solution(s)
I have not received a username and password.	In this case you must contact your Local System Administrator.
I have forgotten my password.	If you forget your password, you should contact your **MoEVR** help desk.
I get a message saying that I am locked out.	This means you have exceeded the maximum number of logon attempts. If this happens, you should contact your **MoEVR** help desk.

Backspace And Enter Keys

Although the **Backspace** and **Enter** keys may be used to effectively perform some actions in **MoEVR**, they may also throw you out of **MoEVR**. If this happens and you are wondering what happened to your **MoEVR** page, try pressing you **F5** key. If a window such as the following pops up, click the **Retry** button.



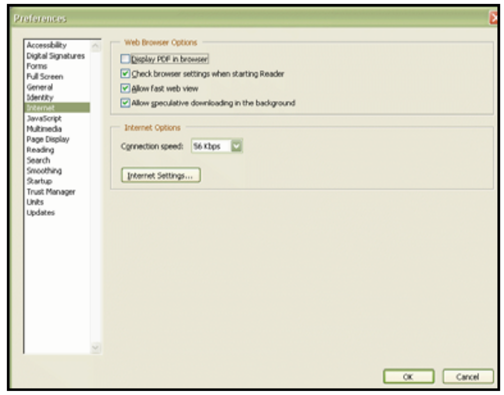
Adobe Acrobat/Printing

Tips: If you experience difficulties with Adobe Acrobat, you should first contact your local IT ***before*** making any changes.

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

Description	Suggested Solution(s)
Nothing happens when I try to generate a document. Adobe does not open.	If Adobe was recently installed on your computer, you may have to register it. (Please check with your Local IT first.) To do this, open your Adobe Reader and respond to the messages that appear. The next time you generate a document Adobe should open.
After printing from Adobe, I close or minimize the Adobe window and I am back on the Logon page.	If this happens, check/change your Adobe settings. Begin by opening Adobe and noting the version number. **Adobe 6.x and greater** If you open Adobe and see that it is version 6.x: 1. Click **Edit → Preferences** on the Adobe menu bar to open the *Preferences* window. If the menu bar is not visible, press your F9 key. 2. Click **Internet** in the list on the left hand side of the *Preferences* window. 3. **Display PDF in browser** should not be checked. If it is checked, deselect (uncheck) it. Your settings should appear as shown below.

Description	Suggested Solution(s)

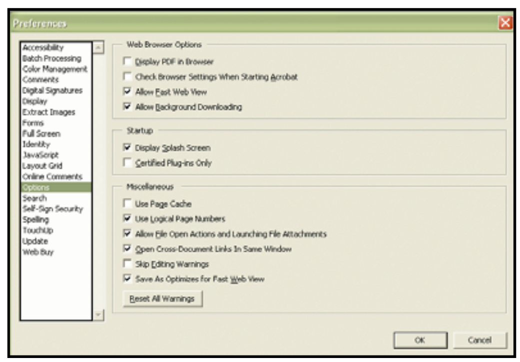


4. Click **OK**.

Adobe 5.x

If you open Adobe and see that it is version 5.x:

1. Click **Edit → Preferences → General** on the Adobe menu bar to open the *Preferences* window. If the menu bar is not visible, press your F9 key.
2. Click **Options** in the list on the left hand side of the *Preferences* window.
3. **Display PDF in browser** should ***not*** be checked. If it is checked, deselect (uncheck) it. Your settings should appear as shown below.



4. Click **OK**.

Chapter

3

To Do Queue

MoEVR

3 To Do Queue

In This Chapter

The To Do queue (TDQ) that appears on the **MoEVR** main page is an internal communication system that informs you when an event occurred for which further action must be taken. This chapter explains what types of actions trigger the process of adding tasks to your TDQ and what you can do with tasks that are listed. Specifically, this chapter contains the following topics.

Note: Depending on your user role you may not see all of the types of items that are discussed in this chapter.

To Do Queue Tasks

Tasks are automatically placed on a TDQ for a variety of reasons including the following:

- You have started a case or one is assigned to you
- A case is ready for an embalmer to certify
- A case has overdue information
- A case has not been certified by the medical certifier
- A case has been dropped to paper

When a task is added to your queue you can process it by clicking the **Process** link. (See “How To Process Tasks” on page 3-5 for more information). However, the list has several other features that you may find useful when working with your TDQ.

To Do Queue Features

The following shows a sample TDQ for a user set up to show many aspects of the TDQ. Your user role and the type of task determine which tabs you will see.

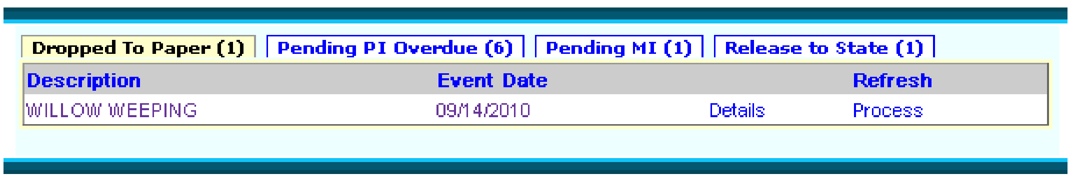


Figure 3-1 Sample TDQ*: From here you can view details for any listed case, change the sort order of the tasks, or process the item. Once processing is complete the processed item is removed from the list.*

Perhaps the most obvious features of the TDQ are the tabs at the top of the list and the actual list of tasks or records on each tab. Each tab contains a particular work load, each representing a different type of task. Each tab includes a title describing the queue, as well as the number of items on each tab.

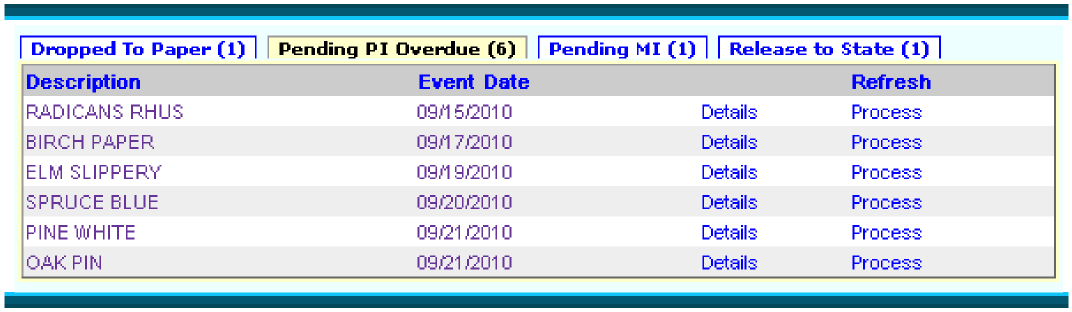
You can open a tab by clicking on its title. For example the TDQ shown in Figure 3-2 shows the items on the **Pending PI Overdue** tab after the **Pending PI Overdue** tab was selected.

Notes: Not all users will see all of the queues discussed in this chapter.

The number in parentheses after the tab name (e.g., **Pending PI Overdue (6)**) indicates the number of cases on the tab.

If a case is not completed and released to the state within a specified number of days, the system will move the case from the **Pending** tab to the **Overdue** tab.

PI refers to the personal information section typically completed by a funeral home. **MI** refers to the medical information section typically completed by a physician, medical examiner or coroner.



Dropped To Paper (1) | Pending PI Overdue (6) | Pending MI (1) | Release to State (1)

Description	Event Date		Refresh
RADICANS RHUS	09/15/2010	Details	Process
BIRCH PAPER	09/17/2010	Details	Process
ELM SLIPPERY	09/19/2010	Details	Process
SPRUCE BLUE	09/20/2010	Details	Process
PINE WHITE	09/21/2010	Details	Process
OAK PIN	09/21/2010	Details	Process

Figure 3-2 Pending Tab*: This shows the items on the Pending PI Overdue tab of the same TDQ shown on the previous figure.*

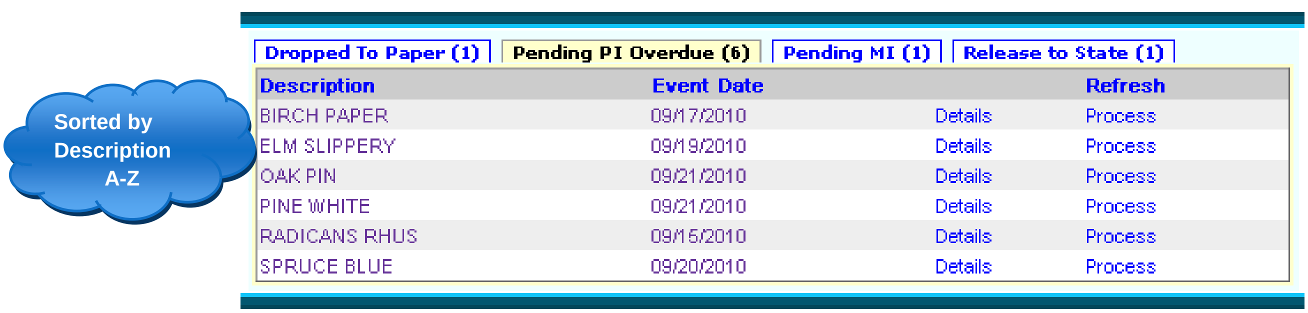
Each task on each tab includes the associated **Description** and **Event Date**. The **Description** is usually the name decedent. You can sort the items as explained in "How To Sort Tasks" below.

Also associated with each task are three links: **Details**, **Process** and **Refresh**. The TDQ updates periodically, but you can force an update at any time by clicking **Refresh**. Please refer to "How To View " on page 3-5 and "How To Process Tasks" on page 3-5 for more information about these features.

How To Sort Tasks

You can change the display order of items on any tab page. This is useful if you have many tasks listed and you want to find a particular one. Figure 3-2 shows tasks on the **Pending** tab showing the default order, which is sorted by **Event Date** (i.e., *not* sorted by **Description**).

To sort the tasks simply click a column heading. The next figure (Figure 3-3) shows the same list of tasks after the user has clicked the column heading of **Description**.



Dropped To Paper (1) | Pending PI Overdue (6) | Pending MI (1) | Release to State (1)

Description	Event Date		Refresh
BIRCH PAPER	09/17/2010	Details	Process
ELM SLIPPERY	09/19/2010	Details	Process
OAK PIN	09/21/2010	Details	Process
PINE WHITE	09/21/2010	Details	Process
RADICANS RHUS	09/15/2010	Details	Process
SPRUCE BLUE	09/20/2010	Details	Process

Figure 3-3 Sorted Tasks*: This shows that the tasks are sorted alphabetically by Description.*

You can reverse the order by clicking the column title a second time. Figure 3-4 shows the same list after the user clicked **Description** a second time.

Sorted by Description Z-A

Dropped To Paper (1) | Pending PI Overdue (6) | Pending MI (1) | Release to State (1)

Description	Event Date		Refresh
SPRUCE BLUE	09/20/2010	Details	Process
RADICANS RHUS	09/15/2010	Details	Process
PINE WHITE	09/21/2010	Details	Process
OAK PIN	09/21/2010	Details	Process
ELM SLIPPERY	09/19/2010	Details	Process
BIRCH PAPER	09/17/2010	Details	Process

***Figure 3-4 Sorted Tasks (Reverse Order)**: This shows that the tasks are sorted by Description in reverse alphabetic order.*

How To View TDQ Record Details

If you want to see basic information associated with a case, click the **Details** link for that task. The details appear. Click the **Close this window** button or the X in the upper right corner of the window when you have reviewed the details.

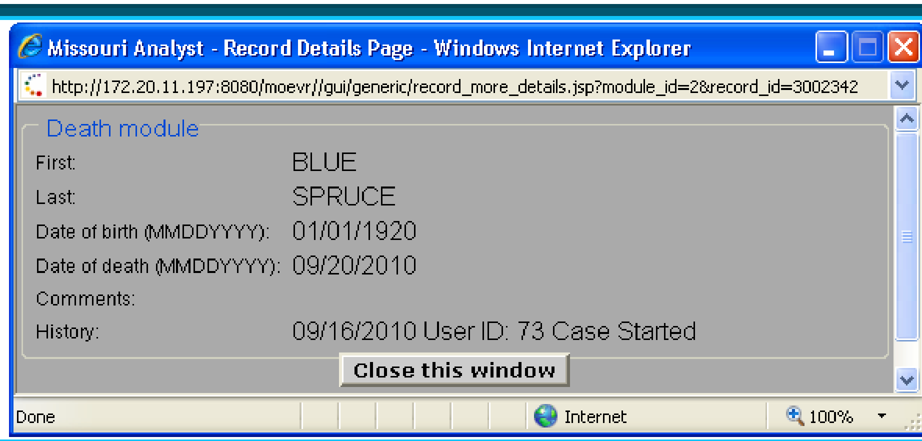


***Figure 3-5 To Do queue Item Details (Sample)**: You can view identifying information for any item in the To Do queue by click the corresponding Details link.*

How To Process Tasks

Processing tasks refers to two general types of processing: acknowledging a notification and continuing work on a case. You acknowledge a notification by simply clicking the **Process** option for the notification task (e.g., a returned record). When you do this, the task is removed from the queue. For other types of tasks, clicking **Process** opens the case so that you can finish it, certify it, sign it, etc. or shows the record details.

A task may appear on multiple tabs for the same record. For example, when a funeral home creates a case, the case is listed on the funeral home's **Pending MI** tab, and it remains on the **Pending MI** tab until it is certified or, if the certifier is not a MoEVR participant, until the funeral director releases it (i.e. drops it to paper).

Tip: Because clicking **Process** removes a notification item, you may want to first click the **Details** option to view additional information about the case or even use the **Search** option on the menu bar to view complete details.

For tasks of the type where you will need to open the form, clicking **Process** will open the case on the corresponding form; otherwise you will be shown the record details. If you need help processing that task, see the chapter in this guide that discusses that particular type of task. For examples:

- To continue adding information to a case, you can refer to the "Creating and Updating Cases" chapter for more information about the death form.
- For assigning or transferring a case, signing or certifying (or refusing to do so), see the "Case Actions" chapter.

How To Refresh Your Queue

MoEVR automatically updates your TDQ on a set schedule. It also provides a way for you to update it "on command."

To update your queue simply click the Refresh link shown in Figure 3-6.

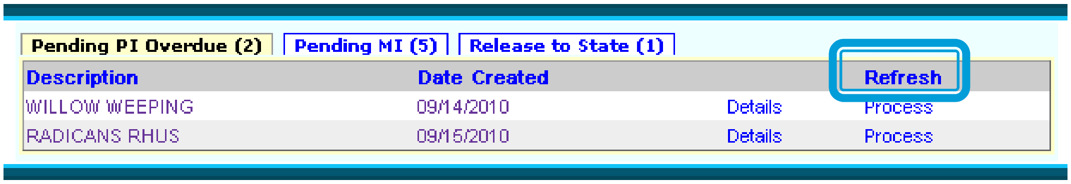


***Figure 3-6 Sample TDQ (Refresh)**: Note the Refresh option that allows you to force an immediate queue update.*

Chapter

4

Viewing & Retrieving Records

MoEVR

4 Viewing & Retrieving Records

In This Chapter

Although you can open your active cases from your To-Do Queue as explained in the "To-Do Queue" chapter, you can also invoke a search to find one of your cases. For example you may want to view the details of one of earlier cases or print a document related to one of your cases. This chapter introduces you to the **MoEVR** search feature. Specifically, this chapter contains the following topics:

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

IN THIS CHAPTER 4-2
WORKING WITH SAVED CASES/RECORDS 4-3
How To Search For Cases 4-3
How To Widen A Search 4-4
VIEWING CASE DETAILS 4-5

Working With Saved Cases/Records

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

- Printing documents
- Viewing record details

Before you can complete any of the above from a menu option you must first retrieve the case.

How To Search For Cases

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

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

To search for a case:

Step 1 Navigate to the desired menu point (e.g., **Update, Search**, etc.). The death *Search* page appears.

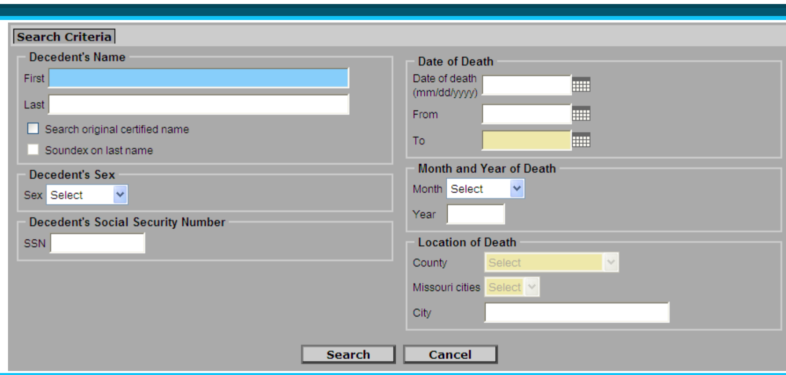


Figure 4-1 Death Search Page*: This allows you to enter information to help find a particular record.*

Step 2 Enter the search criteria you have to help find the case. Most types of searches (updating, printing, etc.) have their own set of fields and search criteria requirements that must be used for the search. If you need to add information a message will appear at the top of the page when you click **Search**.

Search Tip: Select (check) the **Soundex on last name** checkbox on a search page if you are unsure of the spelling of the person's last name and you wish to widen the search to allow for alternate spellings. See "How To Widen A Search" on page 4-4 for additional tips.

Step 3 Click the **Search** button. A list of matching cases appears.

Figure 4-2 Sample Search Results*: Find your case and then click its Details link to continue your work.*

Tip: If no record appears in the list, 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 case to view case details and confirm that you have selected the correct one. The **Record Details** page appears.

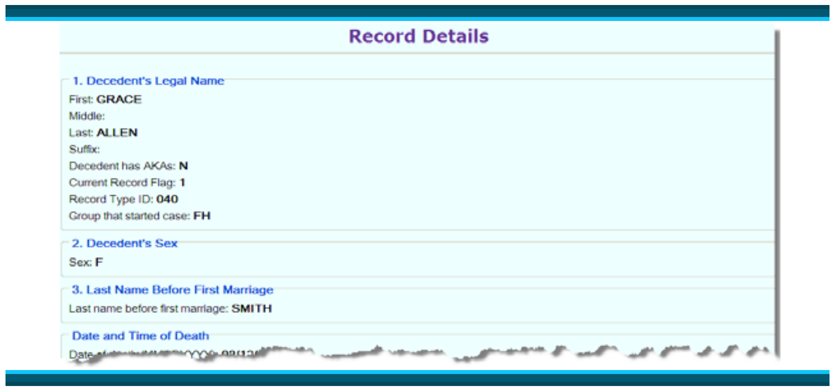


Figure 4-3 Sample Case Details page (Partial)*: Use this page to review the case details.*

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

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

How To Widen A Search

You can check the **Soundex** checkbox to widen the search on last names to allow for variations in spelling. If a last name is entered as smith and **Soundex** is not checked, the system will return cases where the last name is exactly SMITH. If a last name is entered as SMITH and **Soundex** is checked, the system will return cases where the last name is SMITH, SMYTHE, etc.

You can also widen your search by using the wildcard character to represent missing characters. If the last name is entered as SM* system returns cases where the last name begins with SM. If last name is entered as S*H system returns cases where the last name begins with S and ends with H (SMITH, SHAH, etc.). Note that the number of characters that must be entered before the asterisk is pre-set and may be more than one character.

Tip: Use of the asterisk or the **Soundex** checkbox may be necessary to obtain required information. If you cancel when the search process is in progress, it may negatively impact system performance. Therefore, if you use either of these features, please allow the search process to complete.

If you cannot find the name entered or if you know that the name you are trying to find was changed, you can search for the name as it existed on the original certificate. To do this, enter the name and click the **Search original certified name** checkbox.

Viewing Case Details

When you select **Search** from any module menu options, the search page for that module opens, and you can enter your search criteria. Once the search is complete a search results list is displayed. By selecting a case you can view the details of that case. There is no opportunity to modify a case when **Search** is selected.

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Chapter

5

Printing

MoEVR

5 Printing

In This Chapter

You are given the opportunity to print various documents at appropriate steps when working with **MoEVR** application. These opportunities are suggested in other chapters.

This chapter focuses on the printing through the **Print** menu option. The actual print options depend on the module and the user role, but all options fall into the categories presented in this chapter.

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

How To Print Via Adobe Acrobat

Documents to be printed by **MoEVR** use Adobe Acrobat. Anytime you begin a print job that uses the Adobe Acrobat, you should see the document displayed in the Acrobat window. Once displayed, you can print it.

Note: To print, you must have Acrobat Reader 5.x or later installed on your computer. 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 **MoEVR** application may display a *File Download* dialog box. If the file is displayed in Acrobat without first displaying the *File Download* dialog box, skip to Step 3.

Figure 5-1 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.

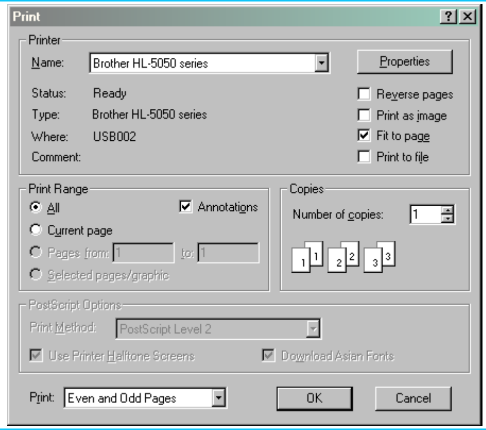

***Figure 5-2 Sample Adobe Print Options**: From here you can specify your print settings.*

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.

Note: If your printer does not have a duplex option and you wish to print double sided e.g. for long lists, you can print each page separately by selecting page 1 in the print options and once page 1 has printed, turn the paper over, put it back in the printer and repeat the step asking for page 2 to print.

Step 5 Close Adobe Acrobat.

Note: When closing Adobe Acrobat, you should remain within the **MoEVR** 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

Documents may be printed when saving a case (e.g. an office copy or a certificate dropped to paper for signing). These documents may also be printed using the **Print** menu option in case there was a printing problem when printing via the *Successful Transaction* page. Because these documents are record-specific you will specify the record for printing using the *Search* page.

Notes: Not all users will need to print reports.

Most reports are generated for multiple records and use a report parameters page to begin the process as explained in "How To Print Reports" on page 5-5. If you are printing a report that is specific to a particular record you will begin with a search page and should follow the procedure below.

How To Print Certificates And Letters

Step 1 Where XX is the name of the document you want to print (e.g. Cremation Letter), click **Death → Print → XX**. The corresponding *Search* page appears.

Step 2 Use the *Search* page to search for the corresponding case. 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 The document is sent to Adobe Acrobat from which you can print the selected document. See "How To Print Via Adobe Acrobat" on page 5-3 if you are unfamiliar with this print process.

How To Print Reports

Most reports are generated based on the information in multiple records. Therefore, the process begins with a parameters page where you specify the range (such as a date range) of records to be included on the report.

Notes: The reports, if any, which you can generate depend on your user role.

If the report you are generating is specific to a single record, you will begin with a search page and should follow the procedure in "How To Print Certificates And Letters" on page 5-5.

To generate a report:

Step 1 Click **Death → Print → Reports**. A list of available reports appears.

Figure 5-3 Sample Reports List*: Depending on your user role you may see some or all of the reports shown in this list.*

Step 2 Click the name of the report you want to generate and print. The corresponding *Report Parameters* page appears.

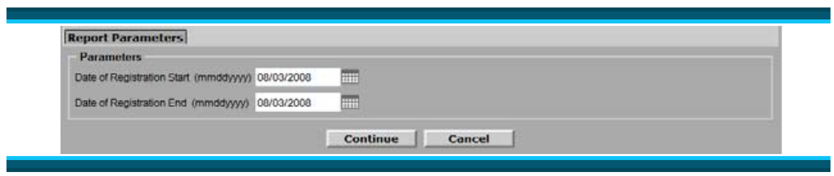

Figure 8-5-4 Sample Report Parameters Entry Page*: This or a similar page appears depending on the type of report.*

Step 3 Provide the parameters for the selected report and then click the **Continue** button.

Step 4 The document is sent to Adobe Acrobat from which you can print as many copies as you need. See "How To Print Via Adobe Acrobat" on page 5-3 if you are unfamiliar with this print process.

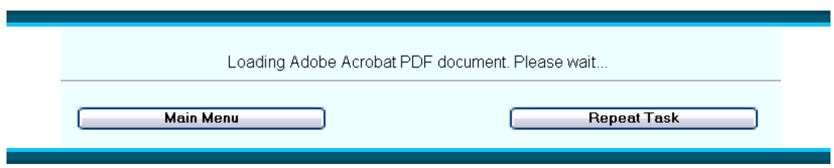

Figure 5-5 Wait While Document is loaded*: When your document displays in Acrobat, you may return to the Main menu or return to the list of available templates.*

Step 5 Click **Main Menu** or **Repeat Task** depending on what you want to do next.

How To Print Blank Forms

You can print out documents that are not populated with case-specific information:

- Cremation statement
- Death certificate
- Out of state disposition

To print a blank form:

Step 1 Click **Death → Print → Blank Forms**. A list of available documents appears.

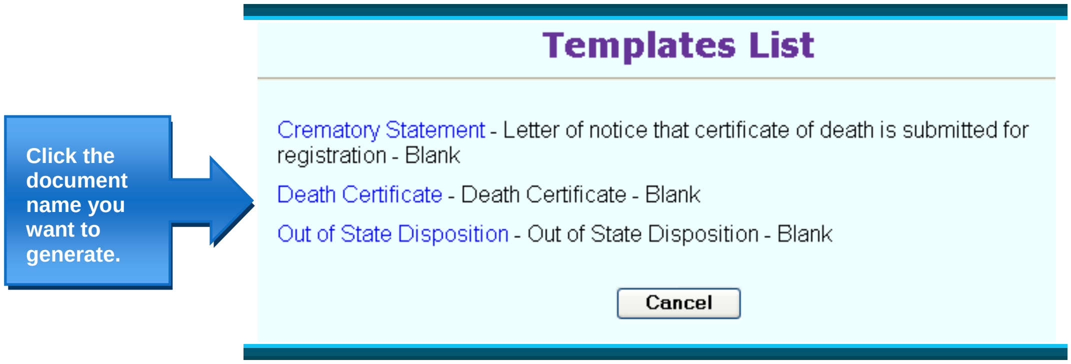

***Figure 5-6 Sample Templates List**: Depending on your user role you may see some or all of the templates shown in this list.*

Step 2 Select the template you want to print. The document is sent to Adobe Acrobat from which you can print as many copies as you need. See "How To Print Via Adobe Acrobat" on page 5-3 if you are unfamiliar with this print process.

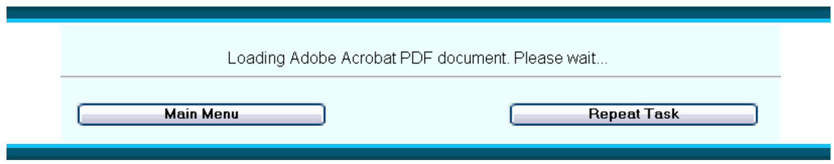

***Figure 5-7 Wait While Document is loaded**: When your document displays in Acrobat, you may return to the Main menu or return to the list of available templates.*

Step 3 Click **Main Menu** or **Repeat Task** depending on what you want to do next.

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Chapter

6

Creating and Updating Cases

MoEVR

6 Creating and Updating Cases

In This Chapter

This chapter explains how to complete the medical portion of a death case as this is what you most often will be doing (In rare cases you may also enter the personal information.) A summary of what physicians, ME/coroners and their staff are generally responsible for is as follows:

1. Complete the medical information.
2. If you create the case, select the funeral home that is responsible for completing the personal information and getting the case to the state.
3. Save the case as pending. Complete any missing information as it becomes available.
4. When all medical information has been entered, the physician, ME/coroner, or staff should indicate that the case is ready for the physician or ME/coroner to certify.
5. The physician or ME/coroner should review and indicate that he/she is certifying the medical information.
6. If the system determines that any information must be completed manually, you will be given the option to drop to paper when you release the case to the state.

Please refer to the chapter called “Case Actions” for more information about assigning funeral homes, certifying and dropping to paper. What you can do in this module depends on your job and, therefore, your access rights. This chapter contains the following topics:

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

Introduction

Physicians and ME/coroners who are enrolled in **MoEVR** will either be adding medical information to cases that have been started by funeral homes or creating death cases for which you they enter the medical information and, in most cases, assign to funeral homes for completion of the personal information.

Cases that were assigned to you by a funeral home appear on your TDQ. From your TDQ you or an enrolled staff person can open these to complete the medical information. Once the medical information is complete only the assigned physician or ME/coroner can certify this information (“Entering Medical Information” starting on page 6-6). In rare cases you may be responsible for entering both medical and personal information; therefore, this chapter includes a section about the personal information (“Entering Personal Information” starting on page 6-9).

When you are the person who starts a case, the **MoEVR** system searches cases already started to help ensure that you are not entering a case that already has been started. If matching cases are found, you have the option of continuing with an existing case or, if you determine that you are indeed entering a new case, continue with the new case. If another physician has been assigned to the case, you should contact that physician or the owning funeral home.

Any time you save information for a case, the system checks the completeness of the case and presents various options based on the results of this check. If you have not entered all required information, you can save an unfinished case as a pending case and complete it at a later time as explained “Updating Case Information” starting on page 6-19.

Creating a case includes a social security number (SSN) verification process and verification of certain information if it is not in an expected range of values. These processes are also explained in this chapter.

The procedures in this chapter include references to all sections on the form; however, your user role may restrict the fields to which you have access.

Until all information, including certification information has been added to a certificate, you are working with an unfinished record. Whether you are starting a case or working on a case from your TDQ, you should follow the procedures provided in this chapter for completing the form.

Note: The instructions in this chapter assume that you have all the information needed to enter all information to save a complete record. If this is not the case, you may open the pages in any order. Remember to save your work by clicking the **Finish** button at the bottom of any page.

Working With Cases

The cases for which you enter medical information originate in two ways: you create the case or the case is assigned to you. If you need to create the case, you will be using a menu option to Create Case as explained in “How To Create Cases” on page 6-4. Cases that are assigned to you appear on your To Do Queue (TDQ). Please refer to the chapter called “To Do Queue” if you are new to these queues. You can work on these cases from your queue. Please refer to “Working Cases From Your To Do Queue” on page 6-5 if you need help on getting this started.

How To Create Cases

Step 1 From the Main menu click **Death → Create Case**. The *Start Case* page appears (Figure 6-1).

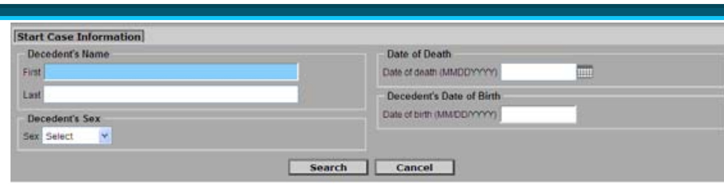

***Figure 6-1 Start Case Information**: Information on this page is required and serves as search criteria to see if the case already exists.*

Step 2 Enter the requested information in all sections on this page. To enter the **Date of death** from a calendar, click the calendar icon next to the date field and then click the correct date.

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, you will see the “There were no results that matched your search” message shown in Figure 6-2. Continue with the next step.

***Figure 6-2 No Records Found**: If you see this message, you should click the Create New Case button to continue with the case.*

Note: If any potential matches are found, you will see a list of potential matches. Refer to section “Matching Case(s) Found” on page 6-15 for information about what to do if this happens

Step 5 Click the **Create New Case** button. The *Decedent* page opens (Figure 6-3).

Tips: The information you entered on the *Start Case* page is already entered on the *Decedent* page: you do not have to re-enter this information.

The medical information begins on tab **7 Time/Autopsy**.

The *Decedent* page includes fields that you must complete to be able to save your started case.

You can save the case by clicking the **Finish** button any time after you enter the information on the *Decedent* page. Until the case is registered you may add or correct information as explained in “Updating Case Information” on page 6-19.

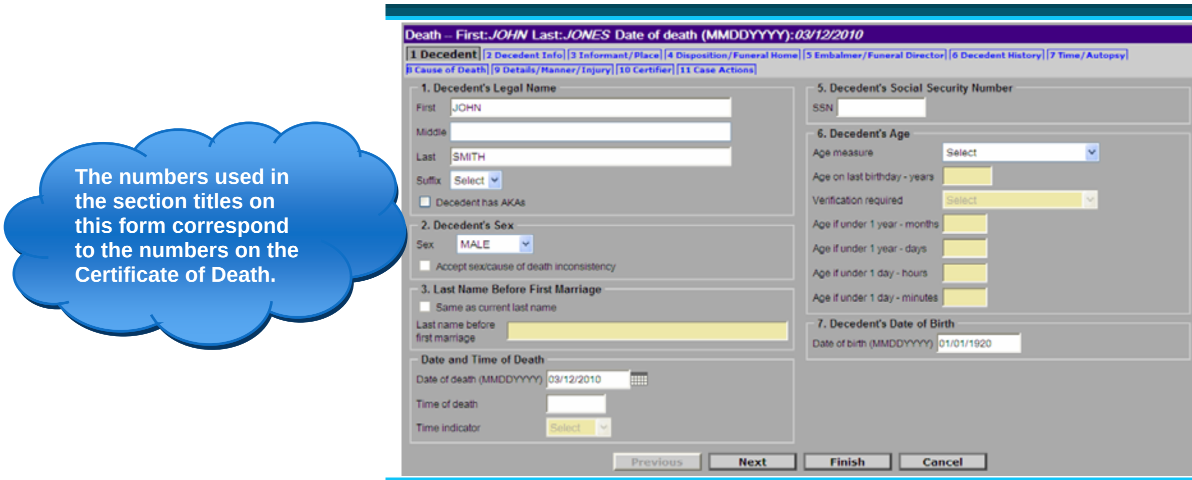

Figure 6-3 In-State Death Form*: This page is populated with the information you entered on the Start Case page.*

Tip: The first five pages of the form contain personal information. The medical information begins on tab **7 Time/Autopsy**. Please refer to “Entering Medical Information” starting on 6-6 for more information.

Working Cases From Your To Do Queue

Step 1 From your TDQ click the **Process** link for the case you want to update. The selected case opens.

Step 2 Make your changes and then click the **Finish** button. Please refer to the “Creating and Updating Cases” chapter if you need additional information about the form or about saving a case.

Tip: The first five pages of the form contain personal information. The medical information begins on tab **7 Time/Autopsy**. Please refer to “Entering Medical Information” starting on 6-6 for more information.

Entering Medical Information

The information that you entered when you started the case is all that is needed on the first tab when you create a case. If desired or necessary you can enter additional information. For information about pages 1-6, please refer to “Entering Personal Information” starting on page 6-9.

If you are working on a case that is listed on your To Do Queue (TDQ), much of the personal information (tabs 1-6) may have already been entered. Whether working on a new case or one you are processing from your TDQ, you will need to enter the medical information.

To enter medial information:

Step 1 Click the **7 Time/Autopsy** page tab. The *Time/Autopsy* page opens.

> **Reminder**: This is the first page of the medical information provided by the physician, medical examiner or coroner.

Step 2 Enter or select information in the **Case Information**, **Actual or Presumed Date of Death**, **Actual or Presumed Time of Death** and **Autopsy** sections.

Application notes for the *Time/Autopsy* page:

- The **Case Information** section is restricted to use by physicians, medical examiners and coroners. You can change the information in this section if information in your records differ from information gleaned by the funeral home.
- In the **Actual or Presumed Date of Death** section, select (check) the **Date Found** checkbox only if the date entered is the date found.
- In the **Actual or Presumed Time of Death** section, you must enter both the **Time** and the **Time indicator**. Select (check) the **Time Found** checkbox only if the time entered is the time found.

Step 3 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 4 Enter or select information in the **Cause of Death** and **Other Significant Conditions** sections.

Application note for the *Cause of Death* page:

- In the **Cause of Death** section several checks are made on the information you enter.
  - Spell check
  - Check for common abbreviations with optional text replacement
  - Check for certain unacceptable causes
  - Check for rare causes
  - Check for indications of cancer to request that additional information be provided
  - Check for unlikely underlying causes

Step 5 Click the **Next** button, the **Details/Manner/Injury** page tab or use the **Alt + N** keys on your keyboard. The *Details/Manner/Injury* page opens.

Step 6 Enter or select information in the **Tobacco Use**, **If Female**, **Manner of Death**, **Injury - When, Injury - Place, Injury - Where, Injury - How** and **Transportation Accident** sections.

Application notes for the *Details/Manner/Injury* page:

- In the **If Female** section if the selected answer to **If female select one from list** is inconsistent with the age of the decedent, you may be asked whether or not this information has been verified (i.e., the **Verification** required list becomes enabled and required to save a finished record). Please refer to "Information Verification" on page 6-18 if you need more information about this process.
- The choices that you can make in the **Manner of Death** section may be limited by other information entered about this case.
- In the **Injury -When** section:
    - You must enter both the **Time** and the **Time indicator** for when the injury occurred.
    - If the exact time of injury is not known, select (check) the **Estimated** checkbox.
- In the **Transportation Accident** section if the decedent's role in the injury is not listed in the **If transportation accident** list, select **Other** and then enter the unlisted role in the **Specify other** textbox.

Step 7 Click the **Next** button, the **Certifier** page tab or use the **Alt + N** keys on your keyboard. The *Certifier* page opens.

Step 8 This page is populated with your information. You cannot change information on this page.

Step 9 Click the **Next** button, the **Case Actions** page tab or use the **Alt + N** keys on your keyboard. The *Case Actions* page opens.

Step 10 Enter any comments you may have and/or initiate any needed action. Please refer to the chapter called "Case Actions" for additional information.

Step 11 Click the **Finish** button at the bottom of the page. At this point the **MoEVR** system will display a list of missing information (Figure 6-4).

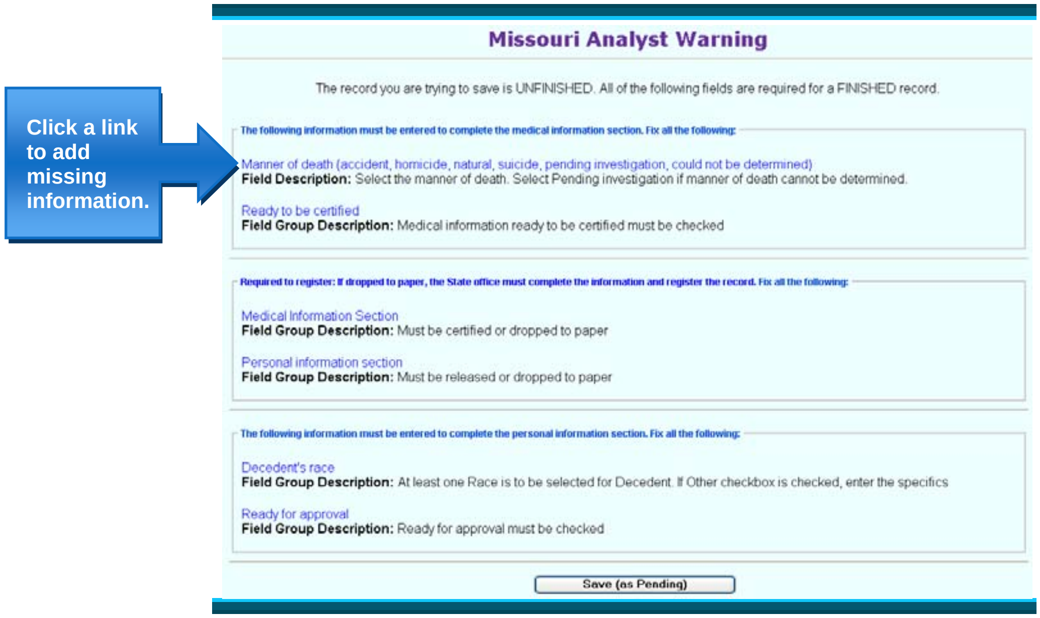

Figure 6-4 Sample Pending Information List*: From here you can save the case as it is or reopen the form to add the missing information.*

Step 12 At this point you can:

Enter the missing information by clicking a link on the **MoEVR** Warning page to return to the form and add the missing information. When you are ready, click the **Finish** button as you did before in Step 11.

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 the "Updating Case Information" starting on page 6-19

Step 13 When you click the **Save (as Pending)** button, you will receive a successful transaction message, with the option to print relevant death document(s) as shown in Figure 6-5.

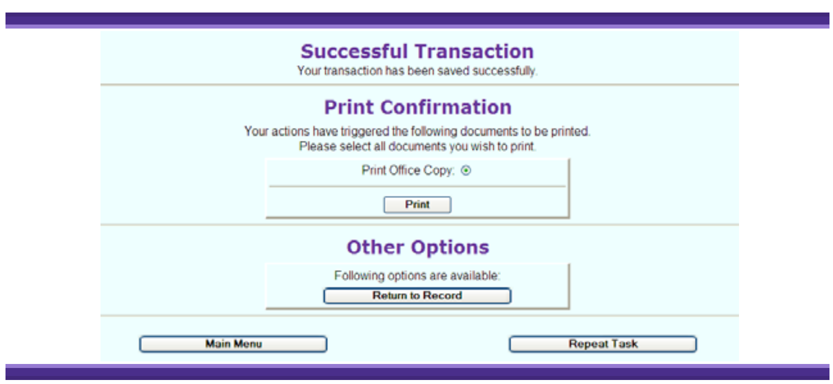

Figure 6-5 Successful Transaction*: From this page you can print a selected document, return to the case, send notification, repeat the current task or return to the Main page.*

Note: If the information for a case indicates that a part of it needs to be completed manually, you will also have an option to drop to paper when you release the case to the state and save. Please refer to the chapter called "Case Actions" if you need more information about how to drop to paper.

Step 14 Select the document(s) you want to print and then click the **Print** button to print the selected document(s). See the next section "How To Use The Print Option" for more information about the print options.

Step 15 Click the **Go Back To Main Page** or **Repeat Task** button if you do not want to print or after the printing process.

Assigning Funeral Home

If you start a case, you must do one of the following:

- Assign a funeral home from the list of funeral homes provided on the *Case Actions* tab. In this case the funeral home has final responsibility for completing the personal information and releasing the case to the state. If this funeral home does not have electronic access, then you will be able to drop the medical information to paper so that the funeral home can complete it and deliver it to the state.
- If the funeral home is not in the list, select the funeral home not in list checkbox on the *Case Actions* tab. In this case you will be able to drop the medical information to paper so that the funeral home can complete it and deliver it to the state.
- If no funeral home is involved, select the person acting as such checkbox on the *Case Actions* tab. When you do this, you will be able to complete the *Disposition/Funeral Home* tab and the *Embalmer/Funeral Director* tab, as well as certify and release the case to the state.

Note: For more information about the above please refer to the chapter called "Case Actions."

Entering Personal Information

Tabs 1-6 of the Death form (Figure 6-3) contain the personal information about the decedent. Generally, you will not need to enter this information. In the rare case where you do need to enter this information, the following steps provide guidance. The assumption is that you have the opened the form to the first tab.

Step 1 Enter/modify or select information in the **Decedent's Legal Name**, **Decedent's Sex, Last Name Before First Marriage**, **Date and Time of Death**, **Decedent's Social Security Number**, **Decedent's Age** and **Decedent's Date of Birth** sections.

Application notes for the *Decedent* page:

- If the decedent's last name and last name before first marriage are the same, you can select (check) the **Same as current last name** to avoid retyping the name.
- In the **Date and Time of Death** section:
    - When you enter the **Date of death** and, optionally, the **Time of death**, the system copies this information to the *Time/Autopsy* page.
    - If you enter the **Time of deat**h, you must also select the **Time of death indicator**.
- If the decedent has any AKAs that you need to include with the record, select (check) the **Decedent has AKAs** checkbox in the **Decedent's Legal Name** section. If you check this and click the **Next** button the *Decedent AKAs* page opens so that you can enter the AKAs.
- In the **Decedent's 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.).
- 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.
- If the **First name**, **Last name**, **Sex**, **Date of Birth** and **Social Security numbers** are 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 6-17.

Step 2 Click the **Next** button, or use the **Alt + N** keys on your keyboard. If you indicated that the Decedent has AKAs, the *Decedent AKAs* page opens.

Note: If the decedent does not have any AKAs, the *Decedent Info* page opens and you should skip to Step 5.

Step 3 Enter or select information in the **Number of AKAs being added**, **First AKA** and **Second AKA** sections.

Application note for the *Decedent AKAs* page:

- Your answer to How many AKAs will you be adding determines whether you can enter information in the First AKA section only or in both AKA sections

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

Step 5 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 Prior To First Marriage** sections.

Application notes for the *Decedent Info* page:

- If the birth country is not known, select **Unknown** in the **Country** list. If the birth country is the United States, but the state is not known, select **Unknown** in the **State/province** list in the **Place of Birth** section.
- In the **Decedent's Residence** section if the country is not known, select **Unknown** in the **Country** list. If the country is the United States, but the state is not known, select **Unknown** in the **State/province** list.
- In the **Marital Status** section, if the selected status is inconsistent with the age of the decedent you will be asked whether or not the status has been verified (i.e., the **Verification required** list becomes enabled and required to save a complete record). Please refer to "Information Verification" on page 6-18 if you need more information about this process.
- If the marital status of the decedent is married or separated in the **Marital Status** section, enter the spouse's name in the **Surviving Spouse's Name** section.
- If the name of the decedent's mother and/or father is not known, click the corresponding **Unknown** checkbox to avoid entering unknown for the name.

Step 6 Click the **Next** button, the **Informant/Place** page tab or use the **Alt + N** keys on your keyboard. The *Informant/Place* page opens.

Step 7 Enter or select information in the **Informant** and **Place of Death** sections.

Application notes for the Informant/*Place* page:

- In the **Informant** section:
  - If the relationship of the informant to the decedent is not listed, select **Other** and then enter the relationship in the **Other, specify relationship** textbox.
  - If the informant shared the same residence as the decedent, select the **Mailing address same as decedent's residence** 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, but the state is not known, select **Unknown** in the **State/province** list.
- In the **Place of Death** your selection in the **Place of Death** field determines whether the **Hospitals** list, **Nursing home/long term care facility** list, or neither list becomes enabled.

Step 8 Click the **Next** button, the **Disposition/Funeral Home** page tab or use the **Alt + N** keys on your keyboard. The *Disposition/Funeral Home* page opens.

Step 9 Enter or select information in the **Method of Disposition**, **Date of Disposition, Place of Disposition, Responsible Firm/Trade Service** and **Funeral Home/Establishment License No.** sections.

Note: For most cases you will not need to provide information about the funeral home. The only time you will need to do this is if there is no funeral home involved, in which case you would first indicate this by selecting the **Person acting as such** checkbox on the *Case Actions* tab. Please refer to the chapter called “Case Actions” for additional information.

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

- In the **Method of Disposition** section if the method is not specifically listed, select Other and then specify the method in the Other – specify textbox.
- If no funeral home is involved and you have selected (checked) the **Person acting as such** on the *Case Actions* page, you can enter information in the **Responsible Firm/Trade Service** section.
- If you are providing a trade service:
  - Select (check) the **Trade service call** checkbox in the **Responsible Firm/Trade Service** section.
  - In the **Funeral Home/Establishment License No.** section select the funeral home for which you are providing the trade service from the **Trade call funeral home list** (for Missouri funeral homes)

    Or

    Select (check) the **Trade service funeral home not in list** check box and then enter the funeral home information in this section manually.

    Tip: To quickly clear out the fields in the **Funeral Home/Establishment License No.** section, first select a different funeral home in the **Trade call funeral home list**, and then set the list to **Select** at the top of the list.

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

Step 11 Enter or select information in the **Embalming Information**, **Embalmer**, **Name of Funeral Director or person acting as such**, **Student Embalmer** and **Embalmer’s Statement** sections.

Note: For most cases you will not need to provide information about the funeral director. The only time you will need to do this is if there is no funeral home involved, in which case you would first indicate this by selecting the **Person acting as such** checkbox on the *Case Actions* tab. Please refer to the chapter called “Case Actions” for additional information.

Application notes for the *Embalmer/Funeral Director* page:

- If the deceased was embalmed by a student embalmer, select (check) the **Embalmed by student embalmer** checkbox in the Embalming information section and enter the student's information in the Student Embalmer section.

- When you select an embalmer in the **Embalmer** section, information about that embalmer is automatically populated into the corresponding fields.

Note: When you select an embalmer who has electronic access and save the record, an item is added to the embalmer's To Do Queue (TDQ) and an item is added to your TDQ on your **Embalmer** tab. When the embalmer completes the **Embalmer's Statement** section, this item is removed from the embalmer's TDQ and from your TDQ's **Embalmer** tab. If the embalmer is not on-line, you will need to drop to paper if you have checked the **Person acting as such** on the *Case Actions* tab.

- In the **Embalmer** section, if the embalmer is not included in the list of embalmers, select (check) the **Embalmer not in list** checkbox and enter the embalmer information manually.
- If no funeral home is involved and you have selected (checked) the **Person acting as such** on the *Case Actions* page, you can enter information in the **Name of Funeral Director or person acting as such** section.

Step 12 Click the **Next** button, the **Decedent History** page tab or use the **Alt + N** keys on your keyboard. The *Decedent History* page opens.

Step 13 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 History* page:

- In the **Education** section, if the selected highest level of education is inconsistent with the age of the decedent you may be asked whether or not this information has been verified (i.e., the **Verification required** list becomes enabled and required to save a complete record). Please refer to "Information Verification" on page 6-18 if you need more information about this process.
- In the **Hispanic Origin** and **Race** sections:
  - Select (check) all pertinent checkboxes.
  - Enter additional information in the textboxes as needed.
- In the **Occupation and Industry** section you may be asked to include additional or more specific information.

Step 14 Click the **Finish** button at the bottom of the page. At this point the **MoEVR** system will display a list of missing information (Figure 6-4).

Notes: From this point on the save process is the same as explained in "Entering Medical Information" starting with Step 12 on page 6-8.

How To Use The Print Option

Whenever you submit a record, the **MoEVR** system determines if, based on the saved information, it is time to give you the option of printing any documents. Depending on the record and the information you are submitting, the list of documents may vary; however, the printing process is the same.

Note: To print, you must have Acrobat Reader 5.x or later installed on your computer. If you encounter print problems with Adobe Reader, please check the *Troubleshooting* section in the "Technical Support" chapter.

To print after saving a record:

Step 1 After you click the form's **Save (as Pending)** button, you are informed that the record has been saved and, as applicable, given the opportunity to print the listed documents (Figure 6-5).

Step 2 Select the desired print option(s), and then click the **Print** button. You are asked to confirm your request (Figure 6-6).

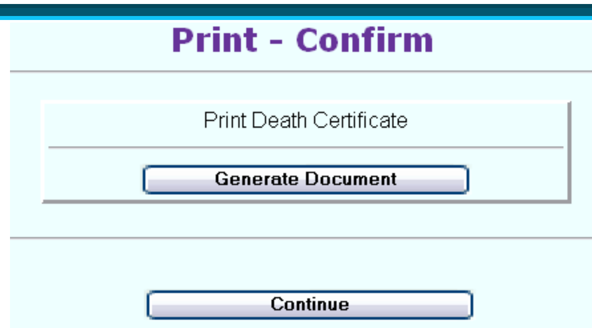

***Figure 6-6 Sample Print Confirmation Page**: Use this page to initiate document generation.*

Step 3 Click the **Generate Document** button. Adobe Acrobat is launched. From Adobe Acrobat you can print the generated document. See the chapter called "Printing" if you are unfamiliar with this print process.

Step 4 Click the **Continue** button. The *Successful Transaction* page appears (Figure 6-7).

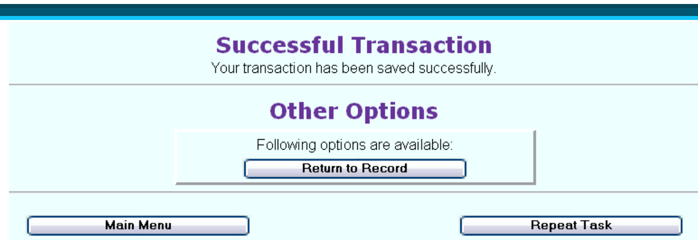

***Figure 6-7 Successful Transaction without Option to Print**: From here you can return to the case to modify information after the document has been reviewed.*

Step 5 Click the **Return to Record**, **Main Menu** or **Repeat Task** button depending on what you want to do.

Note: You may also be able to print these documents from the **Print** menu option as explained in the chapter called "Printing."

Matching Case(s) Found

Whenever you start a case, you begin the process by entering a minimal set of information as explained in "How To Create Cases" on page 6-4. The **MoEVR** application uses this information to determine if the case may already be started. After you click the **Search** button you will be informed that no matching records were found (Figure 6-2) and you should create a new case, or you will be shown a limited amount of information about any records that match the information you entered (Figure 6-8).

Figure 6-8 Duplicate Information Found*: Any cases listed here may be the case you are starting now. To avoid the need to abandon a record you should determine whether your case already exists in the system. .*

How to proceed if duplicate cases are listed:

Step 1 Review the details shown for each listed case. If you are sure that none of the listed cases is the same as the one you are entering, click the **Create New Case** button and continue with Step 1 on page 6-9. If you are not sure, continue with the next step.

Note: If you want to start over or end this process, click the **Exit** button to return to the Main page.

Step 2 Click the **Continue** link (**Action for FH** column) for any listed potential duplicate case. The *Record Details* page opens.

Tip: If a potential duplicate case is found and your location is not the owner of the record, you will not be given the option to **Continue** with a record you do not own.

Step 3 Review the record details.

Step 4 If this is the case you want to work on (i.e., the case you were starting has already been started but you have the authority to continue work on the case), click the **Continue** button at the bottom of the *Record Details* page. The case is opened on the form and you can update the case as needed. Remember to click the **Finish** button to save your changes and allow the application to determine the completeness of the case.

Or

If this is not the same as the case you are starting, click the **Cancel** button at the bottom of the *Record Details* page to return to the Records List (Figure 6-8) where you can check the details of any other listed case and, if you determine that none of the listed cases is the same as the one you are entering, click the **Create New Case** button to add a new case or click the **Exit** button to return to the *Main* page.

Embalmer's Statement

If the deceased was embalmed, an item is added to the Pending or Overdue tab of the embalmer's To Do Queue (TDQ). The embalmer should certify to the fact that they did the embalming on the date specified in the record. If the embalmer is not in the list or not available to complete the embalmer's statement, it becomes the responsibility of the funeral home "authorized" person to complete this section on behalf of the embalmer. You should contact the MoEVR help desk if the embalmer is not available to complete the **Embalmer's Statement** section.

Completing The Statement

Step 1 On your TDQ click **Process** for the case you want to enter the embalmer's statement information.

Step 2 Click on tab **5 Embalmer/Funeral Director**. Notice the **Embalmer's Statement** section.

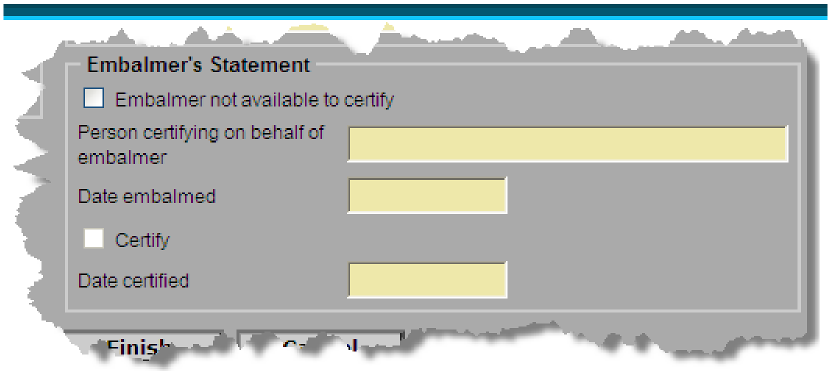

***Figure 6-9 Embalmer's Statement**: Only the embalmer or funeral home "authority" can complete this section.*

Note: If you are the person at your funeral home who is authorized to complete the embalmer's statement when the embalmer is not available, ensure that the **Embalmer not available to certify** checkbox is checked, and be sure to type in your name as the **Person certifying on behalf of embalmer** textbox.

Step 3 Enter the **Date embalmed**.

Step 4 Select (check) the **Certify** checkbox. When you check this checkbox, **MoEVR** puts the current date in the **Date certified** textbox.

Step 5 Click the **Finish** button at the bottom of the page.

Step 6 When the warning page opens, click the **Save (as Pending)** button. The case is removed from your embalmer's TDQ.

Verification

If you are entering the personal information for a case the social security information is checked (verified) by the Social Security Administration (SSA). This is an automatic process that occurs when certain information has been entered on the first page and saved. Additionally, you may be asked to verify a value you have entered.

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 6-10.

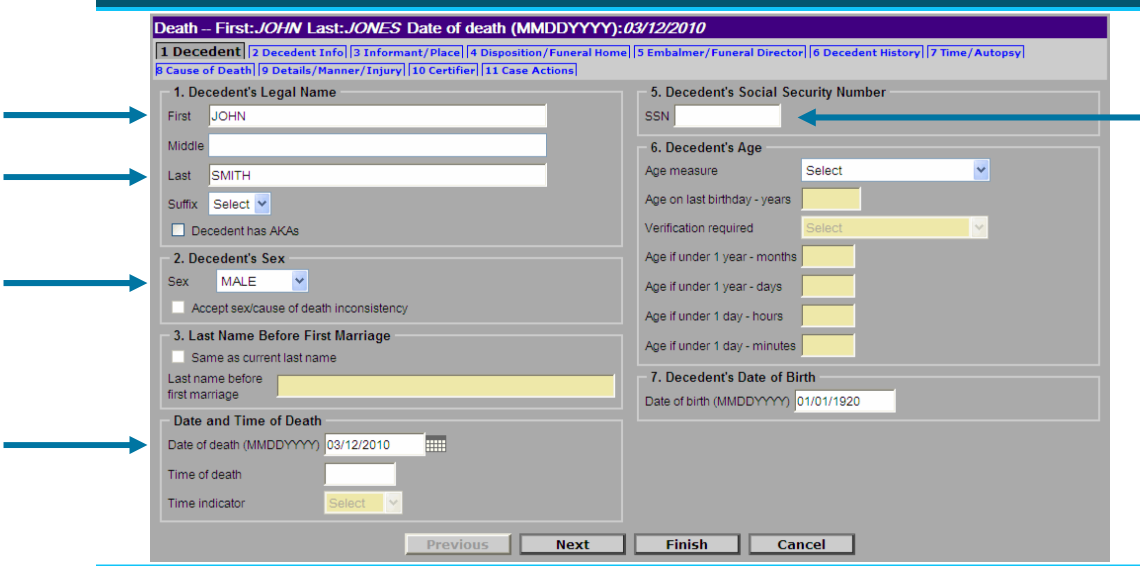

***Figure 6-10 SSN Verification Fields**: This shows the information that must be entered before the SSN verification process can be initiated.*

Following the verification process the results are displayed in the **SSN verification** field (Figure 6-11).

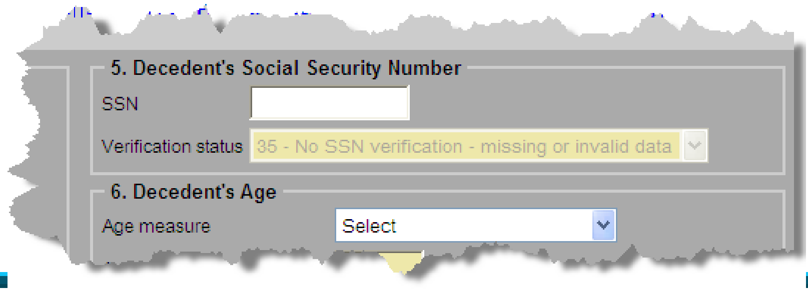

***Figure 6-11 SSN Verification Status**: Initially the status indicates that no SSN verification has occurred. Once information has been entered in the SSN verification fields and the record has been saved, the status will be updated.*

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 is sent for SSN verification (i.e. first name, last name, sex and date of birth) and re-initiate the verification process if any of this information was entered incorrectly.

Information Verification

For certain fields 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 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 the value is correct as entered, please indicate whether or not you were able to verify the value entered by making the corresponding selection from the associated Verification required list (Figure 6-12).

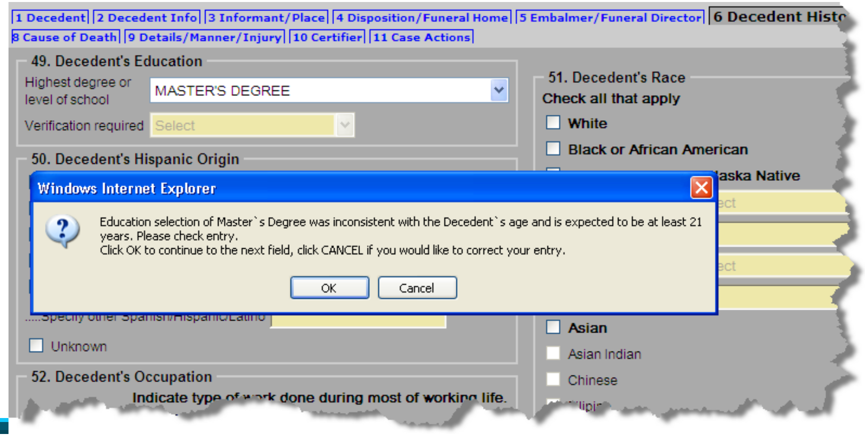

Figure 6-12 Sample Verification Required Companion Field*: If you enter or select an out-of-expected range value a message appears and the Verification required list is enabled. You can change the value or indicate whether you have verified the information.*

Updating Case Information

This section contains information about updating case information. Because you may initiate case actions any time a case is open on your desktop, case actions are discussed in another chapter ("Case Actions").

How To Update Cases

Any case that that needs medical information that you are expected to provide is added to your to do queue (TDQ) as a pending case. If you need to add or correct information for a case that is on your TDQ, you can begin the process from the TDQ. (Refer to the chapter called "To-Do Queue" for more information about the work queue.)

Note: The **MoEVR** system does not recognize actions on any of your records to be complete until all required medical information has been entered and you have assigned the case to a funeral home or until you have completed the entire form and released the case to the state.

To open a form to update:

Step 1 From your TDQ click the **Process** link for the case you want to update. The selected case opens.

Step 2 Make your changes and then click the **Finish** button. Please refer to the "Creating Cases" chapter if you need additional information about the form or about saving a case.

Abandoning Cases

You may have the occasional need to abandon a case. If you need to abandon a case, please contact MoEVR support.

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Chapter

7

Case Actions

MoEVR

7 Case Actions

In This Chapter

Physicians and ME/coroners are responsible for:

1. Completing the medical information and, rarely, the personal information.
2. Working with the funeral homes or persons acting as such to ensure the completion of the case information. **MoEVR** provides a way to deliver a case to a funeral home electronically or, if the personal information should be dropped to paper, a way to drop a case to paper for manual delivery.

To work with the funeral homes and to direct a case to other participants you will be using the fields on the *Case Actions* page.

This chapter explains the various types of case actions you can perform. Specifically this chapter contains the following topics:

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

Initiating Case Actions

Case actions are actions that typically result in an item being placed on a user's TDQ, the status of a case being updated and/or an entry being added to the history of a case. Some of these actions are invisible to the user, such as when starting a case and saving it as unfinished. Most actions, however, require specific direction from you. You may need to initiate any of the following actions for your case.

- Assign funeral home to case
- Decline a case that was assigned to you
- Indicate that case is ready for certification
- Certify

The above actions are initiated from the *Case Actions* page. The *Case Actions* page is the last page on the electronic death form (Figure 7-1).

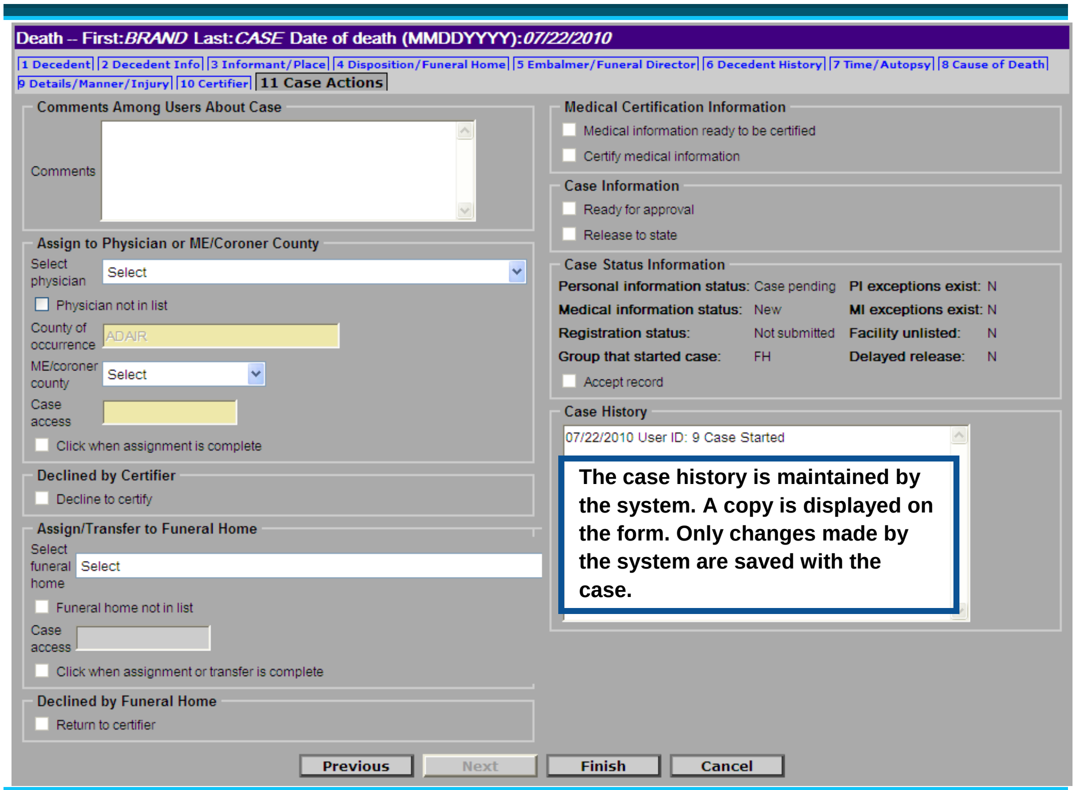

Figure 7-1 Case Actions Page*: This page is where you communicate to the system and case "owners" what is going on with the case. All significant actions are added to the case history, a copy of which is shown in the lower left side of the page.*

Note: The actions you can take depend on your user role, the status of the case and other information entered on the case.

"Delivering" Cases To Funeral Homes Electronically

Cases are seldom, if ever, handled at a single location. Typically funeral homes add personal information and medical certifiers add medical information.

The section below explains how to assign the personal portion of a case to a funeral home. When you assign a case to a funeral home, **MoEVR** will determine if the case should be "delivered" electronically. If the funeral home is not enrolled, a physician or ME/coroner can drop the completed medical information onto a death certificate for delivery to the funeral home to complete as explained in "How To Drop To Paper" starting on page 7-10. Whether the funeral home is enrolled (i.e., on-line) or not will be evident when you assign the funeral home to a case.

How To Assign Funeral Homes

Physicians, ME/coroners and staff can assign a funeral home to a case if one is not already on the case. When you assign a case to a funeral home, you can see if the funeral home will receive the case electronically or if you will need to drop the case to paper. A funeral home who is on-line receives cases on her/his To Do Queue (TDQ).

Tip: You do not have to wait until you have entered all medical information before assigning a case to the funeral home. As long as you have completed the required information on the first page of the form – the **Decedent** tab – you can make the assignment.

To assign a funeral home:

Step 1 From your TDQ click the **Process** link for the case you want to assign. The electronic form for the selected record opens.

Or

If the electronic form is already open for the case you want to assign, start with Step 2 in this procedure.

Step 2 Click the **Case Actions** tab at the top of the form or press **Alt + Page Down** on your keyboard. The *Case Actions* page opens. Note the **Assign/Transfer to Funeral Home** section on the *Case Actions* page (Figure 7-2).

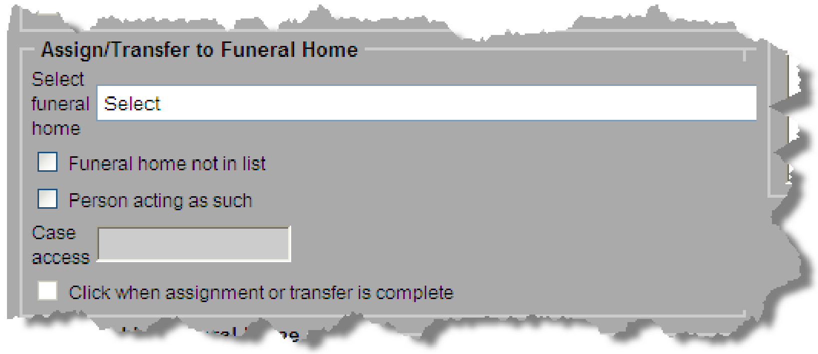

Figure 7-2 Assign/Transfer to Funeral Home*: Use this section if you are about to assign a funeral home to a case.*

Step 3 Select the funeral home from the list. The checkbox for completing your action becomes available for selection.

Or

If the funeral home is not in the list, select check) the **Funeral home not in list** checkbox. The checkbox for completing your action becomes available for selection.

Or

In the rare event that no funeral home will be involved, select (check) the **Person acting as such** checkbox. The checkbox for completing your action becomes available for selection. Doing this will allow you to complete the funeral home and funeral director information for the person acting as such. This information is required for completing and releasing the case.

Note: If the funeral homes **Case access** is "DROP TO PAPER" or you check **Funeral home not in list**, you will be able to print the certificate for manual completion when the funeral director releases the case to the state and saves the record. Please refer to "How To Drop To Paper" starting on page 7-10 for more information about this process.

Note that the Case access here is ELECTRONIC

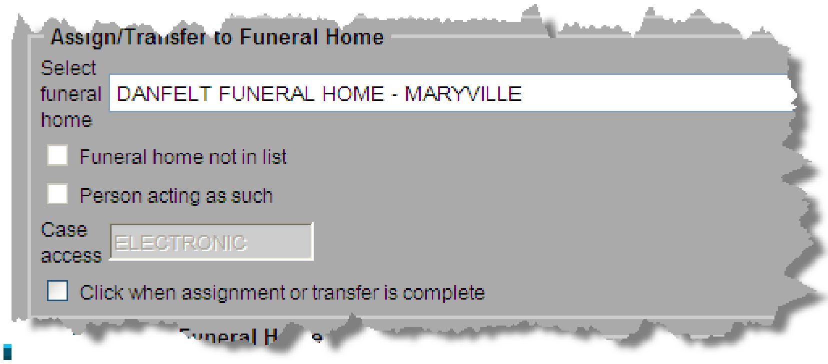

Figure 7-3 Electronic Case Access (Example)*: Case access of ELECTRONIC means that the funeral home is enrolled in MoEVR and will see the case added to their To Do Queue.*

Step 4 When you have indicated who will be completing the personal information, select (check) the **Click when assignment or transfer is complete** checkbox.

Note: When you indicate that you have completed the assignment, the **Case History** is updated with information about this case action.

Step 5 Click the **Finish** button at the bottom of the page to save this information. The **MoEVR** system places the case on the physician's **Pending MI** queue. Or if the selected funeral home is not on-line (i.e. **Case access** is **DROP TO PAPER**) or you selected **Funeral home not in list**, you will be able print the certificate to give to the funeral home for manual completion as explained in "How To Drop To Paper" starting on page 7-10.

Certifying Medical Information

Physicians, ME/coroners, and staff who have access to **MoEVR** can enter medical information; however, only physicians and ME/coroners may certify this information. The following conditions must be met before a case can be certified.

- All medical information has been completed
- A funeral home has been assigned or an indication that the funeral home is not in the list has been made or you have completed all personal information on behalf of the person acting as such
- The case has been marked as ready to be certified

Completing Medical Information

Completing medical information means adding all required information on tabs 7-10 and saving this information. When you save the record without completing this information, you will see a list of multiple pending medical information items as explained in the chapter called "Creating and Updating Cases." When all medical information has been added, you will only see an item for **Ready to be certified** in this section.

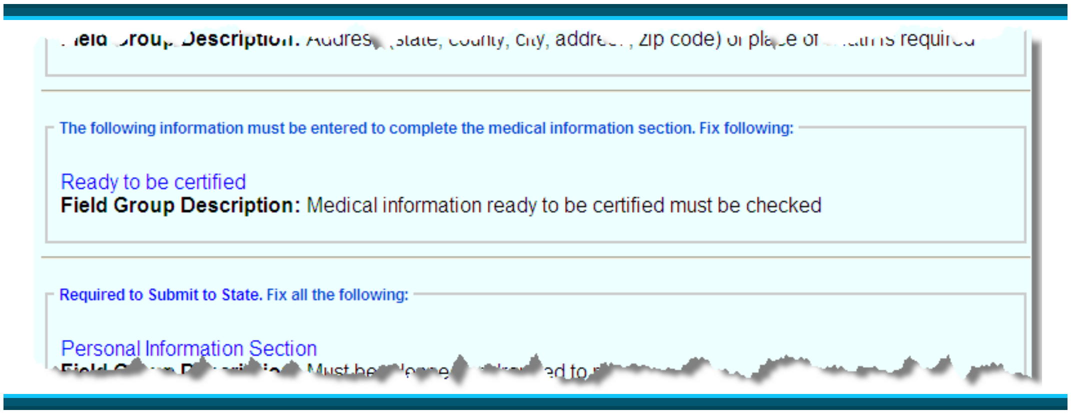

Figure 7-4 Pending Items (Medical information section)*: This shows the only outstanding item in the medical information section to include only "Ready to be certified."*

Ready To Certify

When you save a record that is ready to be certified, you will see the pending page shown in Figure 7-4. If you see other items on this page, you will need to complete the missing information before it can be certified.

Note: The certification process is set up to allow staff to enter the case information and indicate that it is ready to be certified, but only the assigned physician or ME/coroner, logged on with his or her own logon information, can certify the medical information.

How To Indicate That Cases Are Ready To Be Certified

Step 1 From your TDQ click the **Process** link for the case you want to mark. The electronic form for the selected record opens.

Or

If the electronic form is already open for the case you want to mark, start with Step 2 in this procedure.

Step 2 Click the **Finish** button at the bottom of any tab to see the list of pending items.

Step 3 From the pending items page (Figure 7-4) click the **Save (as Pending)** button. The **MoEVR** system sets up for the review/approval process provided that all information is complete except for indicating that the case is ready for approval.

Step 4 Click the **Return to Record** button.

Step 5 Click the **Case Actions** tab or press **alt + page down** keys on your keyboard to open the *Case Actions* page.

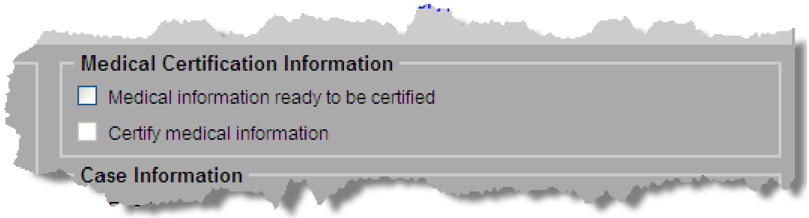

Figure 7-5 Medical Certification Information Section on Case Actions Page*: This allows physicians or ME/coroners to complete the steps for certifying the medical information provided on a death case.*

Step 6 In the **Medical Certification Information** section select (check) the **Medical information ready to be certified** checkbox. Notice that the **Certify medical information** checkbox becomes available for selection.

Tip: If you are the assigned physician or ME/coroner and you have reviewed the case and are satisfied that the medical information is complete and accurate, you can complete the certification process at this time by selecting the **Certify medical information** checkbox.

Step 7 Click the **Finish** button and save this information.

Certify Medical Information

Before certifying the medical information for a case you should ensure that this information is complete and accurate. You may also want to review the information on the *Case Actions* page in the **Medical Certification Information**, **Case Information**, **Case Status Information** and **Case History** sections (Figure 7-6.

- In the **Medical Certification Information** section the **Ready to be certified** checkbox is checked and the **Certify** checkbox is available for selection.
- The **Case History** will include information as to what funeral home was assigned to the case.
- The **Case Status Information** section will say that the medical information is ready to be certified and that the personal information is pending if an online funeral home is responsible for the personal information or drop to paper if the funeral home is not online.

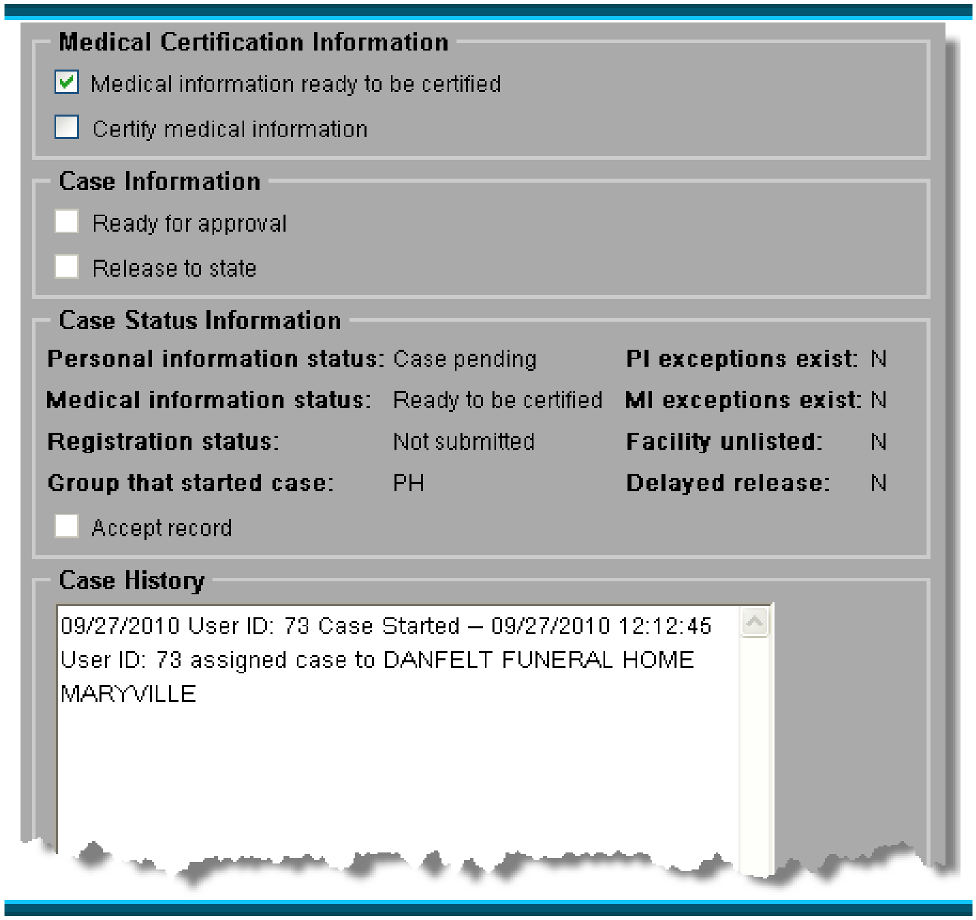

Figure 7-6 Case Actions Page (Ready to be Certified)*: These sections provide information about where the case is in the release process. In this example the case was assigned to an electronic certifier and the medical information is "Ready to be certified." Note that the personal information is incomplete (i.e. Case pending).*

How To Certify Medical Information

Step 1 From your TDQ click the **Process** link for the case you want to mark. The electronic form for the selected record opens.

Or

If the electronic form is already open for the case you want to certify, proceed to the next step.

Step 2 Click the **Case Actions** tab or press your **Alt + Page down** keys on your keyboard to go to the *Case Actions* page.

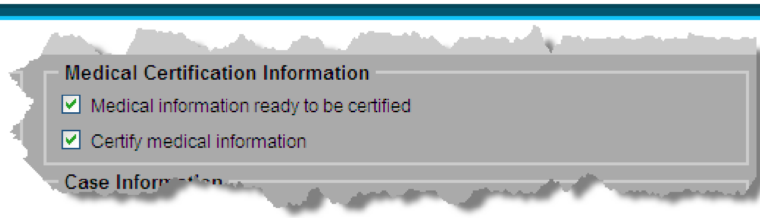

Figure 7-7 Case Actions Page (Certified)*: This shows that the medical certifier is certifying the medical information.*

Step 3 In the **Medical Certification Information** section on the *Case Actions* page select (check) the **Certify medical information** checkbox.

Tip: Only the physician or ME/coroner can log on and certify.

Step 4 Click the **Finish** button and then on the *Warning* page click the **Save (as Pending)** button. You are informed of a successful transaction.

Tip: If there is no funeral home involved (i.e., a person is acting as such, you will also need to release the case to the state as explained in "Releasing Cases (Person Acting As Such)" on page 7-12.

Step 5 From the *Successful Transaction* page you can **Print Office Copy** of the case, return to the **Main Menu** or **Repeat Task**.

How To Drop To Paper (Deliver Case Manually)

The drop to paper process is an automatic process that is invoked if the funeral home and/or embalmer is not enrolled in **MoEVR** and the certifier has released the case to the state. When you release such a case to the state, you will have an option to drop to paper for delivery to the funeral home.

Notes: You can only drop to paper if:

1) The medical information is complete.

   AND

2) The **Personal information status** is "Drop to paper"
   OR
   The funeral home is not in the list and you have selected **Funeral Home not in list**.
   OR
   The embalmer is not enrolled as a **MoEVR** user.

   AND

3) You indicate that you are ready to release the case to the state (i.e. **Release to state** is checked) and save the record. If no funeral home is involved (i.e., **Person acting as such** was checked on the *Case Actions* page, you must also release the case to the state.

Refer to Figure 7-8 to see where these conditions are shown.

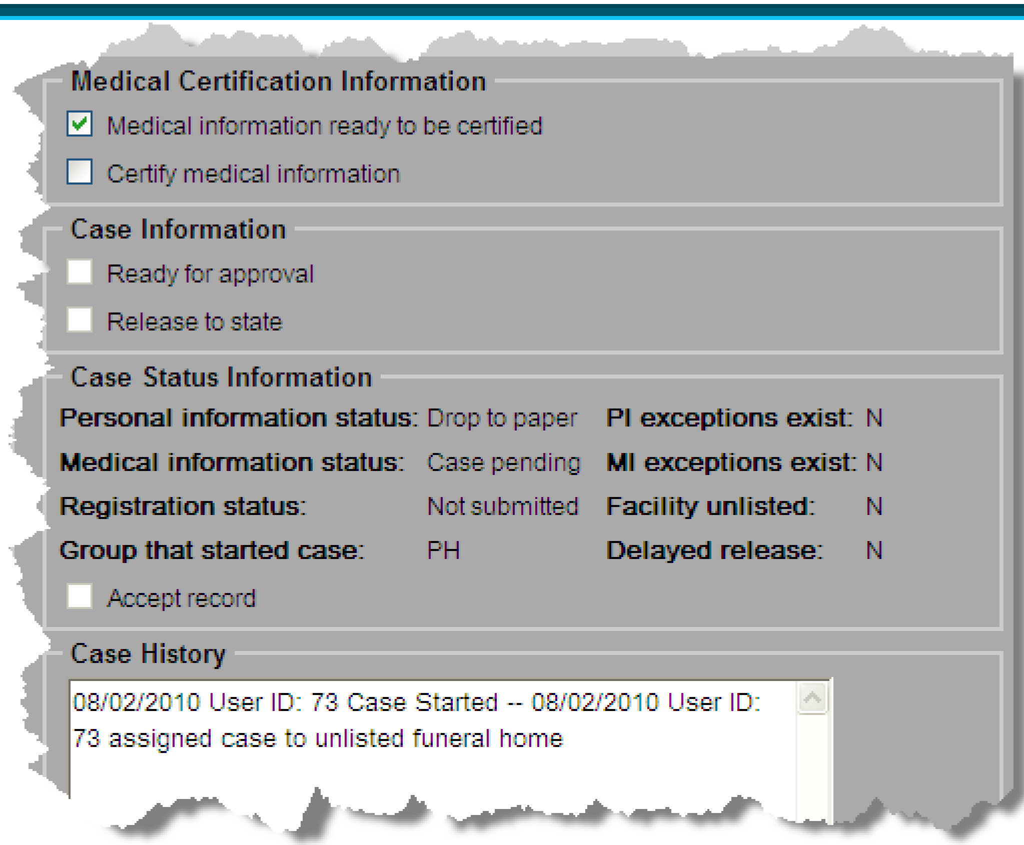

Figure 7-8 Case Actions Page (Drop to paper)*: These sections provide information about where the case is in the release process. In this sample the case was assigned to a certifier without electronic access.*

Not Your Case?

Physicians or ME/coroners may have cases added to their TDQ that have been assigned to them by funeral homes. Or they may have started a record in error and need to have the case removed from their workload (i.e., their To Do Queue). If for any reason you determine that you should not be completing such a case, you should return the case or inform the state office that you want to abandon a case.

How to Return Cases

Step 1 From your TDQ click the **Process** link for the case you want to mark. The electronic form for the selected record opens.

Or

If the electronic form is already open for the case you want to certify, proceed to the next step.

Step 2 When the form opens, click the **Case Actions** tab at the top of the form or press **Alt + Page Down** on your keyboard. The *Case Actions* page opens. Note the **Declined by Certifier** section on the *Case Actions* page (Figure 7-9).

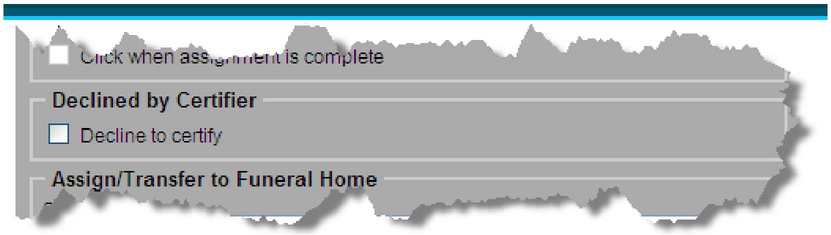

Figure 7-9 Return to sender*: Use this for returning a case to a funeral home.*

Step 3 Select (check) the **Decline to certify** checkbox.

Step 4 Click the **Finish** button at the bottom of the page to save this information. The case is removed from your TDQ.

Abandoning Cases

In case you enter a case in error you should you should abandon the case as explained in the chapter called “Creating and Updating Cases.”

Releasing Cases (Person Acting As Such)

If you are acting on behalf of a person acting as funeral home/director, the following conditions must be met before a case can be released.

- Medical information has been certified
- All personal information has been completed
- The case has been marked as ready to be released

Tip: If you are the certifier (physician or ME/coroner), you can mark the case as ready to be released and release it to the state during the certification process. To do this first select the **Certify medical information** checkbox, then the **Ready for approval** checkbox, and, finally, the **Release to state** checkbox.

Completing Personal Information

Completing personal information means adding all required information on tabs 1-6 and saving this information. When you save the record without completing this information, you will see a list of multiple pending personal information items as explained in the chapter called “Creating and Updating Cases.” When all personal information has been added, you will only see an item for **Ready for approval** in this section.

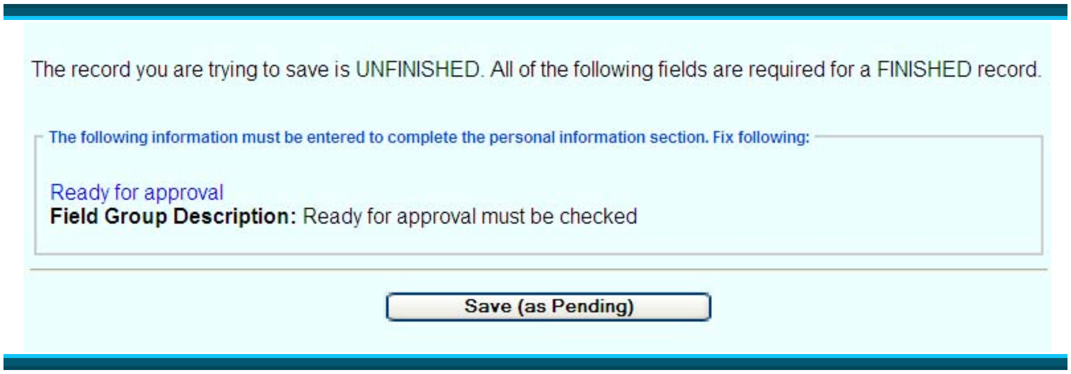

Figure 7-10 Pending Items (Ready for Approval)*: This shows the pending, or warning, page as it will look when it is time to begin the approval process that will release the case to the state.*

Ready For Approval

When you save a record that is ready to be approved, you will see the pending page shown in Figure 7-10. If you see other items on this page, you will need to complete the missing information before the case can be approved.

Note: The approval process is set up to allow staff to enter the case information and indicate that it is ready for approval, but only the physician or ME/coroner, logged on with his or her own logon information, can approve the case.

How To Indicate That Cases Are Ready For Approval

Step 1 From your TDQ click the **Process** link for the case you want to mark. The electronic form for the selected record opens.

Or

If the electronic form is already open for the case you want to assign, start with Step 2 in the procedure.

Step 2 Click the **Finish** button at the bottom of any tab to see the list of pending items.

Step 3 From the pending items page (Figure 7-4) click the **Save (as Pending)** button. The **MoEVR** system sets up for the review/approval process provided that all information is complete except for indicating that the case is ready for approval.

Step 4 Click the **Return to Record** button.

Step 5 Click the **Case Actions** tab or press **alt + page down** keys on your keyboard to open the *Case Actions* page.

***Figure 7-11 Case Information Section on Case Actions Page**: This is where funeral home completes the steps for approving the info provided on a death case.*

Step 6 In the **Case Information** section select (check) the **Ready for approval** checkbox. Notice that the **Release to state** checkbox becomes available for selection.

Tip: If you are the certifier, you can complete the release process at this time by also selecting the **Release to state** checkbox.

Step 7 Click the **Finish** button and save this information.

Release To State

Before releasing a case to the state you should ensure that this information is complete and accurate. You may also want to review the information on the *Case Actions* page in the **Medical Certification Information**, **Case Information**, **Case Status Information** and **Case History** sections (Figure 7-6.

- The case has been certified.
- In the **Case Information** section the **Ready for approval** checkbox is checked and the **Release to state** checkbox is available for selection.
- The **Case History** includes info as to what certifier was assigned to the case.
- The **Case Status Information** section will say that the personal information is ready for approval and that the medical information has been certified.

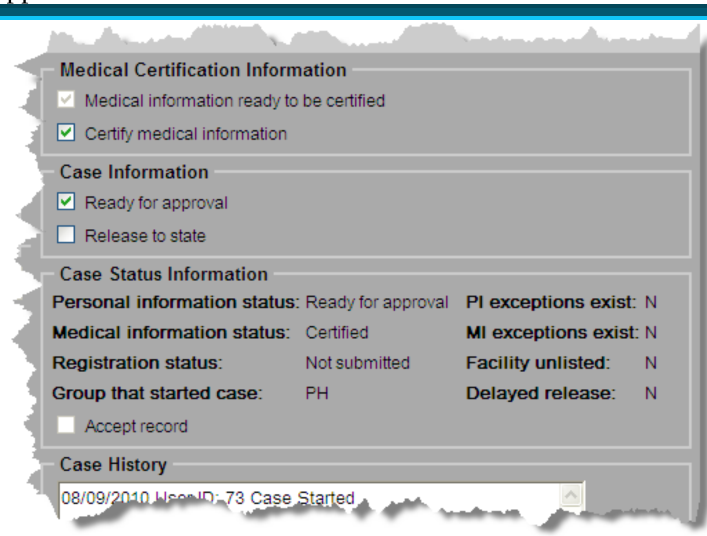

***Figure 7-12 Case Actions Page (Ready to Release to State)**: These sections provide information about where the case is in the release process. In this sample the certifier or assistant entered all the personal info and has indicated that the case is ready to be released.*

How To Release Cases To The State

Step 1 From your TDQ click the **Process** link for the case you want to mark. The electronic form for the selected record opens.

Or

If the electronic form is already open for the case you want to release, proceed to the next step.

Step 2 Click the **Case Actions** tab or press your **Alt + Page down** keys on your keyboard to go to the *Case Actions* page.

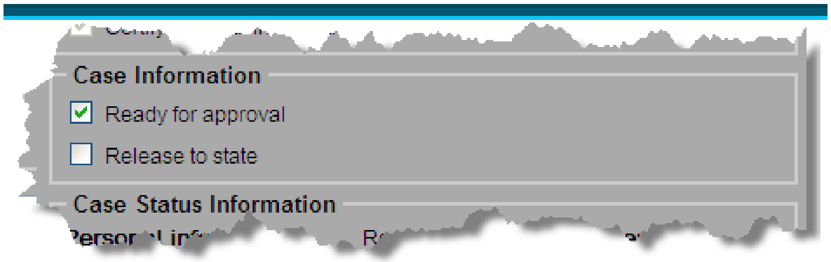

Figure 7-13 Case Actions Page (Released to State)*: This shows that the funeral director is releasing the record to the state.*

Step 3 On the *Case Actions* page select (check) the **Release to state** checkbox.

Tip: Only the certifier (physician or ME/coroner) can log on and release a case to the state.

Step 4 Click the **Finish** button. As there are no pending items the *Successful Transaction* page opens.

Step 5 From the *Successful Transaction* page you can **Print Office Copy** of the case, print the certificate (i.e. drop to paper), return to the **Main Menu** or **Repeat Task**.

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