
TxEVER

**Modified Commercial Off-the-Shelf Product for Vital
Events Registration System**

Death Local Training Guide

Version 1.0

06/22/2018

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About the TxEVER Death Application Back Office Training Guide

This guide is intended to provide step-by-step exercises that will allow the user to explore functions and features related to Back Office functions. Individual tasks will help users gain experience in gaining access to various processes of the system. The process will also allow the user to understand general concepts associated with the application.

Section I. General Data Entry contains exercises designed to familiarize users with the basic General Data Entry features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 1 – Access General Data Entry
- Exercise 2 – Start and Save a New Record
- Exercise 3 – Searching and Work Queue
- Exercise 4 – Using the Unresolved Fields List
- Exercise 5– Cancelling Changes
- Exercise 6 – Update Record
- Exercise 7 – Abandoning a Record
- Exercise 8 – General Data Entry Topics
- Exercise 9 – Overrides
- Exercise 10—Release a Record

Section II. Back Data Entry contains exercises designed to familiarize users with the basic Back Data Entry features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 11 – Access Back Data Entry
- Exercise 12 – Create a New Record
- Exercise 13 – Search for a Legacy Record
- Exercise 14 – Using the Unresolved Fields List
- Exercise 15 – Cancelling Changes
- Exercise 16 – Abandon a Record in Back Data Entry
- Exercise 17 – Back Data Entry Topics
- Exercise 18– Release a Record in Back Data Entry

Section III. Local Print Queue contains exercises designed to familiarize users with the basic Local Print Queue features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 19– Access Local Print Queue
- Exercise 20– Search for Records Previously Not Printed
- Exercise 21– Search for Records Previously Printed
- Exercise 22— Print Records

Section IV. Local Burial Transit Permit Queue contains exercises designed to familiarize users with the basic Local Burial Transit Permit Queue features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 23– Access Local Burial Transit Permit Queue
- Exercise 24– Search for Permits
- Exercise 25– Accept Permit Request
- Exercise 26— Reject Permit Request

Section V. Local Acceptance Queue contains exercises designed to familiarize users with the basic Local Acceptance Queue features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 27– Access Local Acceptance Queue
- Exercise 28– Accept a Record
- Exercise 29– Reject a Record
- Exercise 30— Re-Assign a Local
- Exercise 31— View Corrections

Section VI. Legal View contains exercises designed to familiarize users with the basic Legal View features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 32— Access Legal View
- Exercise 33— Legal View Search Screen
- Exercise 34—Printing from the Legal View Screen
- Exercise 35—View/Print Net Change History

Section VII. Corrections and Amendments contains exercises designed to familiarize users with the basic Corrections and Amendments features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

Corrections

- Exercise 36—Access Corrections
- Exercise 37—Make a Correction
- Exercise 38—Submit a Correction
- Exercise 39—Cancel a Correction

Amendments

- Exercise 40—Access Amendments
- Exercise 41—Make an Amendment
- Exercise 42—Submit an Amendment
- Exercise 43—Cancel an Amendment

Section VIII. Extracts contains exercises designed to familiarize users with the basic extract features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 44—Local Batch File
- Exercise 45—Interstate Jurisdictional Exchange (IJE) Extract
- Exercise 46—Voter Abstract Extract
- Exercise 47—Extract File Downloader

Section IX. Reports contains exercises designed to familiarize users with the basic canned report features. These exercises should be executed when the user is accessing a test or training site rather than the production site. Fictitious records should be used for the exercises in this guide.

Exercises provided in this section include:

- Exercise 48— Running a Report

Logging in to TxEVER

Before performing any of the exercises in this Training Guide, login to TxEVER in accordance to the steps listed below.

Prior to making any attempts to access the TxEVER Death Application, a State user needs to verify that they have access to the following requirements:

- ✓ Live Internet connection
- ✓ Widely used JavaScript enabled standard web browser (IE8+, Mozilla Firefox, etc.)
- ✓ Java runtime
- ✓ Adobe Acrobat reader for forms and letters
- ✓ MS Excel for accessing/running reports

If one or more requirements are missing, the **Death** module will **not** be accessible and/or will **not** function properly. Please follow the instructions below once verifying all requirements are met as specified above.

1. Launch your internet browser (i.e. IE8+, Mozilla Firefox, etc.)
2. Enter the following address in the URL box or select from Favorites:
<https://txever.dshs.texas.gov/TxEverUI/Welcome.htm>
3. The application splash page will load, as pictured below:

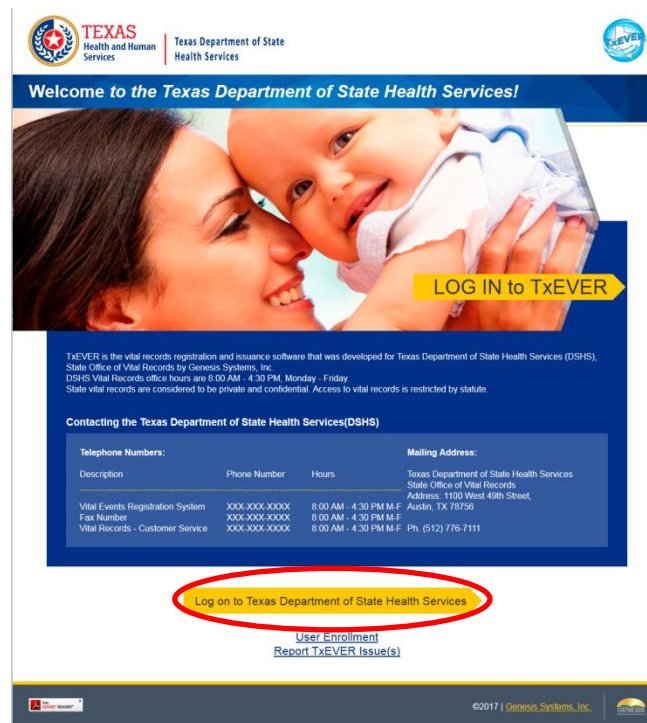


Figure 1: TxEVER Splash Page

4. Click the **Log On to Texas Department of State Health Services** button.

5. The **Terms of Use Screen** will load, as pictured below:

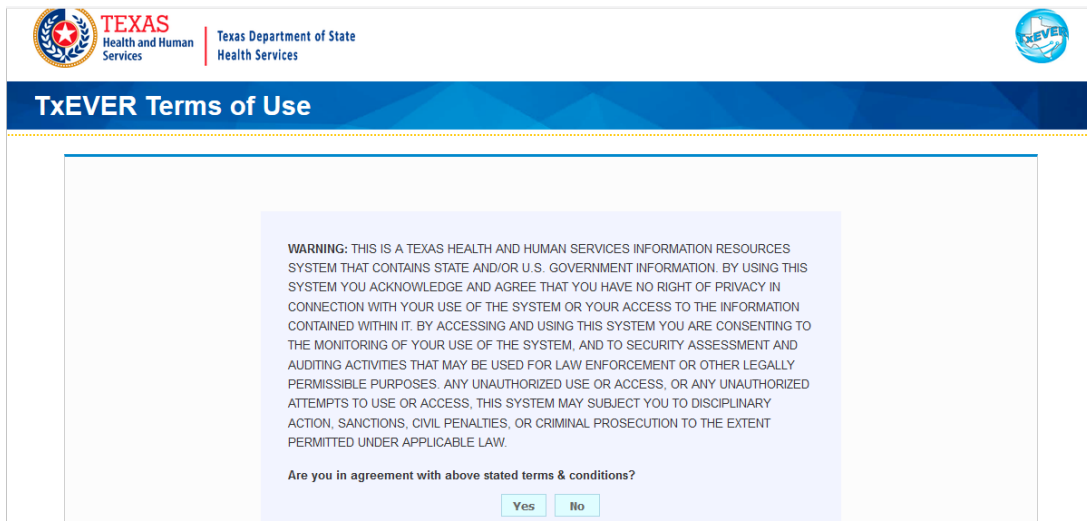


Figure 2: Terms of Use

6. Click the **Yes** button to confirm agreement with the terms of use.
 - a. Click the **No** button to be returned to the TxEVER splash page.
7. The TxEVER login screen will display:

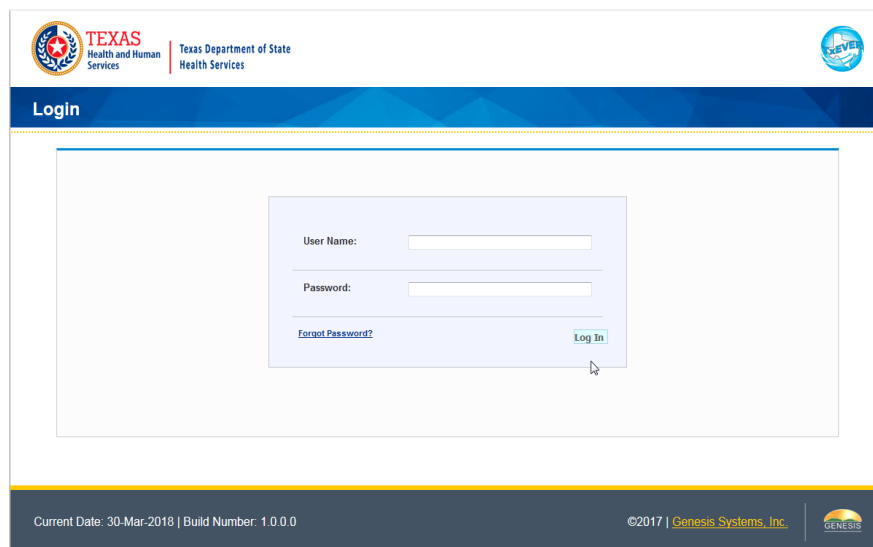


Figure 3: TxEVER Login Screen

8. Type in the User Name provided to you to login - this is not case sensitive.

9. Press the **Tab** key on the keyboard to advance focus to the Password field (or use the mouse and click on the password field if you prefer).
10. Type the password provided to you to login.
11. Press the **Tab** key on the keyboard to advance focus to the **Log In** command button.
12. With focus on the Log In command button press the **Enter** key to execute the Login command.
 - ✓ Optional approach: After entering the password you can also use the mouse to point to and left click on the **Log In** command button instead of using the **Tab** and **Enter** keys.
13. Login Locations – If you are associated with more than one location, the Location Selection Window pictured below will contain all locations assigned to your account. If you create NEW records while logged in under a given location, they will become associated with that location.

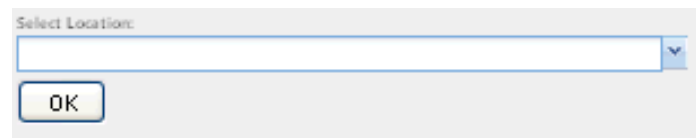


Figure 4: Select Location Screen

14. Note that the field on the screen has a set of arrows on the right side. This indicates that there is a dropdown list associated with this item.
 - Press the **Tab** key to set focus on the Select Location field. This will open the list.
 - Use the arrow keys to highlight a desired location followed by the **Tab** key to select it and set focus on the **OK** command button.
 - Press **Enter** to finalize the location choice and access the application.
15. Mouse – There are intuitive mouse alternatives for navigating the application and selecting items. Practice alternating the use of mouse and the keyboard approaches to determine the optimal method.

Session Time Out:

During these exercises it may take much more time to complete operations that would be true in actual use of the application. If the system has not detected a business transaction (save a record, search for a record, login) within 20 minutes, the session will time-out and you will not receive further responses from the system. A warning will appear to alert you to this. If the system appears to stop responding (no choices in some pick lists, cannot save

a record, cannot retrieve a record, etc.) it is likely that a session time-out has occurred. To recover from a session time-out, close the application Internet browser and re-login to start a new session. Saving the work you are doing frequently will prevent session time-outs. If you will not be using the application for a time you should close it and then login again when you need it.

16. The main menu of the application appears as shown in Figure 5:



Figure 5: TxEVER Main Page


17. Exit the application by using the mouse to point to the Log Out icon  or to the **Function/Exit Application** menu item and then click once with the left mouse button. Refer to the screenshot below for a visual representation of logging out of TxEVER:



Figure 6: Function/Exit Application Menu Option

1 General Data Entry

These exercises provide an overview of different processes in General Data Entry.

To complete these exercises, the user will need:

- ✓ Access to General Data Entry

1.1 Exercise 1—Access General Data Entry

1. Select the **Death/Function/General Data Entry** menu item to initiate a new death record.

1.2 Exercise 2—Start and Save a New Record

This exercise provides an overview of how to begin the General Data Entry process as well as how to save a new record.

To complete this exercise, the user will need to:

- ✓ Have the proper security process to access General Data Entry

1. Select the **Death/Function/General Data Entry** menu item to initiate a new death record.
2. The Initial General Data Entry screen will appear:

Figure 7: General Data Entry Initial Load

- Click the **New** icon  or select the **Record/New** menu item. The **New Record** screen will appear:

Figure 8: New Record Screen

- The field focus is automatically set to the left side of the ‘Date of Death Type’ field on the new screen as indicated by the change of color of that field.

5. The Date of Death Type field will be defaulted to a value of Actual so this field may not need to be altered unless the Date of Death Type value is something other than Actual.
 - If the Date of Death Type is Actual press the Tab key on the keyboard to advance to the Date of Death field for this record.
 - If the Date of Death Type is not Actual you may change the field value using the keyboard— Type either an E (for estimated), F (for found), AP (for approximate), P (for presumed) or C (for court determined) and then press the Tab key to advance to the Date of Death field for this record.
6. Type the Date of Death for this record. Type only the numbers. You will see that the slashes are provided as you type. Press Tab to advance to the Social Security Number field.
7. For this exercise, leave the Social Security Number field blank and press Tab to advance to the SSN Missing Value Variable field. The Social Security Number is important if one is available.

Note: In live user of the application it will be required for the user to enter the decedent's social security number on the NEW screen (if the SSN is known).

8. The options for the SSN Missing Value Variable include: Unknown, Pending, None and Not Obtainable. Begin to type the word Unknown until the drop-down list opens and the word Unknown is highlighted.
 - To open the list when you don't know what options might be there you can press the Down Arrow key on your keyboard while focus is on the field but the list is not open.
 - With the word Unknown highlighted in the list, press the Enter key to select the highlighted choice and advance focus to the Record Type field.
9. The Record Type for this death record is defaulted to Identified.
 - If the Record Type is Identified, press the Tab key on the keyboard to advance to the EDR Number field for this record.
 - If the Record Type is not Identified, you may change the field value using the keyboard—Begin to type the word Unidentified until the drop-down list opens and the word Unidentified is highlighted and then press the Tab key to advance to the EDR Number field for this record.
10. Leave the EDR Number field blank and press Tab to advance. The EDR Number is important if there is one available.
11. Leave the Med Rec field blank and press Tab to advance.
12. Leave the ME Case Number field blank and press Tab to advance to the First Name field.

13. Type information for the decedent's first name and then press Tab to advance to the middle name and then repeat to complete the middle and last names. Tab from the last name field to set focus on the Suffix field.
14. With focus on the Suffix field, type the letter J and then press Tab.
 - This is the keyboard approach to drop-down lists when you know the first few letters of the option you need. It will result in Jr being selected as the Suffix.
15. With focus on the Date of Birth field, hold down the Shift key and while it is held down press the Tab key.
 - Focus should return to the Suffix field. This is referred to as Shift+Tab and it moves focus back to the previous field.
16. With focus on the Suffix field containing Jr, press the Delete key to clear the contents of the field.
 - Once a drop-down field has a value in it you can use backspace or delete to erase the letters in order to make another selection.
17. With focus on the cleared Suffix field, press the Down Arrow on the keyboard to open the list and then use the down arrow to navigate until Sr is highlighted. When Sr is highlighted, press Tab to select it and advance to the Date of Birth field.
18. With focus on the Date of Birth field, enter the date of birth of the decedent. Type only the numbers.
19. Press the Tab key to advance from the date of birth field.
20. With focus on the Gender field, type the letters MA and then press Tab.
 - Highlights Male, selects Male, advances focus to Type of Place of Death
21. With focus on Type of Place of Death, press the Down Arrow on the keyboard to highlight the option for Hospital-Inpatient.
22. Press Tab to select Hospital-Inpatient as the type of place of death and advance to Place of Death.
23. With the Type of Place of Death set as Hospital-Inpatient and focus on the Place of Death type DALL

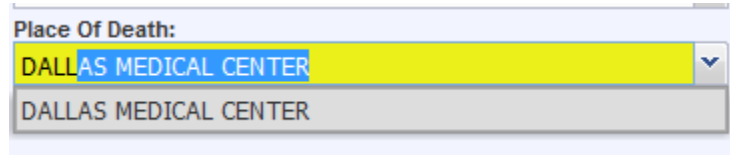


Figure 9: Place of Death Field

- This is an example of the Minds Eye drop-down functionality that allows you to simply type the response you are looking for. In most cases you will not need to type more than a few letters of the item you are looking for.
24. Press the down arrow once and then press Tab to select the highlighted choice DALLAS MEDICAL CENTER and press Tab to advance to the **Find Record** button.
 25. Press Enter to execute the find record command.
 - Although you are trying to create a NEW record, the system will always assume that the record may have already been created by a user at a different location. Death records may be created at the place of death and in some cases may have had the medical portion completed and medically certified. The information captured on the NEW screen has been carefully defined to optimize the likelihood of finding the matching record if one exists.
 - The response from Find Record will vary according to the results. If a single matching record is found that is either not already 'owned' by a different funeral home or that is already owned by the location you are logged in under, the record will be retrieved to the demographic data entry screen for your access. If no matching record is found, a new record will be created. If a record is found that is already 'owned' by another funeral home, the system will provide that information so you can investigate further.
 26. We will assume that the result in the present exercise is that a NEW record will be created. Press Enter to execute the OK command or use the mouse to point to the **OK** button and click once with the left mouse button.

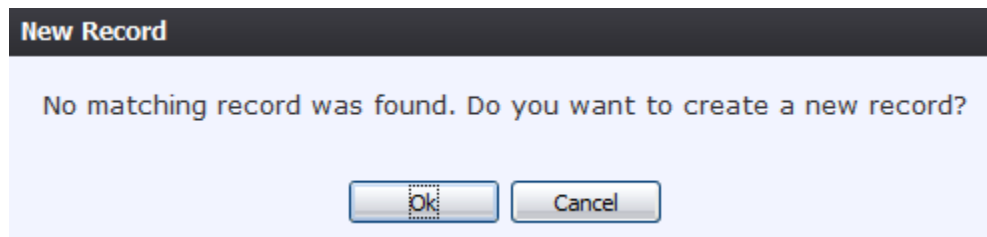


Figure 10: Record Creation Confirmation Message

27. The first tab of the General Data Entry screen will appear. Use the mouse to point to the Save Record icon and then click once with the left mouse button to save the NEW record before continuing to complete the data entry.

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

1.3 Exercise 3—Searching and Work Queue

This exercise provides an overview of how to search for a record in the death application.

To complete this exercise, you will need:

- ✓ Have the proper security process to access General Data Entry

Searching for a record in the application can be accomplished by using one of the following options:

- ✓ Search Screen
- ✓ Work Queue Search

1.3.1 Search Screen


1. Click the **Search** icon  or select the **Record/Search** menu item.
2. The **Search Record** screen will be displayed, as shown below:

Figure 11: Death Search Screen

3. Enter all available information regarding the record.
 - ✓ **Tip:** Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.
 - ✓ **Tip:** Along with a name, including the year of death (which can be entered as a series of 00s followed by a year- i.e. 00/00/2012) and gender and other information will reduce the number of matches that are returned and cause faster search returns.
 - ✓ **Tip:** Choosing 'Soundex' still requires the user to enter at least the decedent's year of death. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound familiar as well.
4. Click **Search**.
5. Records that match the search criteria will populate the grid in the lower half of the screen, as shown below:

Death Search

Wild-Card Soundex

DECEDENT'S ACTUAL INFORMATION				RECORD INFORMATION			
EDR Number:	<input type="text"/>			State File Number:	<input type="text"/>		
Date Of Death: (ex. 00/00/2012 if month and day are not known, 02/00/2012 if day is not known.)	* 00/00/2018						
Decedent's First Name:	<input type="text"/>						
Decedent's Middle Name:	<input type="text"/>						
Decedent's Last Name:	<input type="text"/>						
Decedent's Sex:	--Select a value--						
Decedent's Date Of Birth:	<input type="text"/>						
PARENT'S INFORMATION				PLACE OF DEATH INFORMATION			
Father/Parent 2 First Name:	<input type="text"/>			Place Of Death Type:	--Select a value--		
Father/Parent 2 Last Name:	<input type="text"/>			Place Of Death:	--Select a value--		
Mother/Parent 1 First Name:	<input type="text"/>			Place Of Death County:	--Select a value--		
DISPOSITION AND FACILITY				CERTIFIER			
Facility Name:	--Select a value--			Certifier Type:	--Select a value--		
				Medical Certifier: (First Name or Last Name)	<input type="text"/>		

EDR Number	Date Of Death	Decedent's First Na	Decedent's Middle	Decedent's Last Na	Decedent's Sex	Decedent's Date Of	State File Number	Father/Par
00000000396	01/01/2018	ARLEN	M	ALDIS	MALE	01/01/2018		SARENA
00000000381	01/01/2018	KIM		ALVIN	FEMALE	11/25/1970		MARK
00000000414	01/01/2018	EMILY		MAC	FEMALE			
00000000319	01/01/2018	JORDAN		JACK	MALE			
00000000324	01/01/2018	MARK	J	WILSON	MALE	02/05/1982		
00000000325	01/01/2018	MYKE	DE	MOORE	FEMALE	02/08/2011	0000882018	JULIA
00000000287	01/01/2018	MADONA	M	DAISY	MALE	01/01/2017		

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Search Select Record(s) Clear Close

Figure 12: Death Search Screen Populated with Results

- Click on the appropriate record in the grid. Select multiple records by holding down the **Ctrl** key and clicking on records.
- Click **Select Record(s)** to retrieve record(s) to the work queue.
- Select a record from the work queue by clicking on it to retrieve it to the screen.
- The record and its information will appear on the screen as an active record for additional review and/or processing.

1.3.2 Work Queue Search

The work queue in the **General Data Entry** process will contain the following:

- Death records associated with your login location that still require some type of action
- The list in the work queue will be sorted by the decedent's date of death and will display the decedent's last name, decedent's first name, and decedent's date of death.

- From the drop-down list, set the filter for the appropriate record type. Options include:
 - All Unresolved:** All records that have been started but the information is not yet complete.
 - Drop to Paper:** All records that have been dropped to paper.
 - Pending Verification:** All records that are pending verification.
- From the list, select the appropriate record by clicking on it or, start typing decedent's last name into the field.

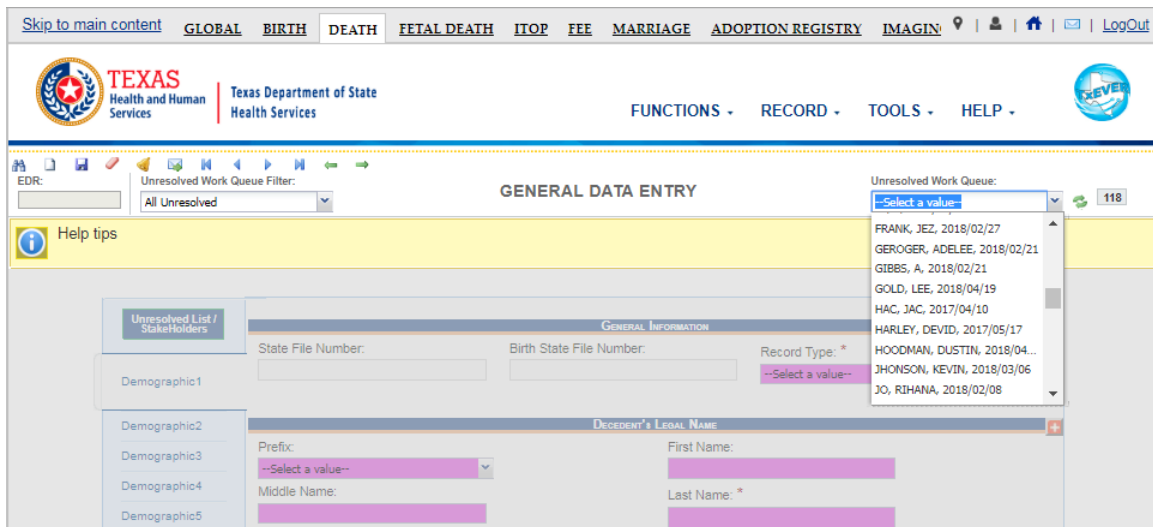


Figure 13: Unresolved Work Queue

- The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional review and/or processing.

1.4 Exercise 4—Using the Unresolved Fields List

This exercise provides an overview of how to check and use the Unresolved Field list. To check if all data items were completed, use the Unresolved List to identify areas that require some sort of action before the record is resolved.

To complete this exercise, the user will need to:

- ✓ Access the General Data Entry screen
- ✓ Search for a record using the Search Screen or the Unresolved Work Queue

To view the Unresolved Fields list:

- Retrieve an existing record.
- On the **General Data Entry** screen, click **Unresolved/Stakeholders** at the top to open the Unresolved Fields list.

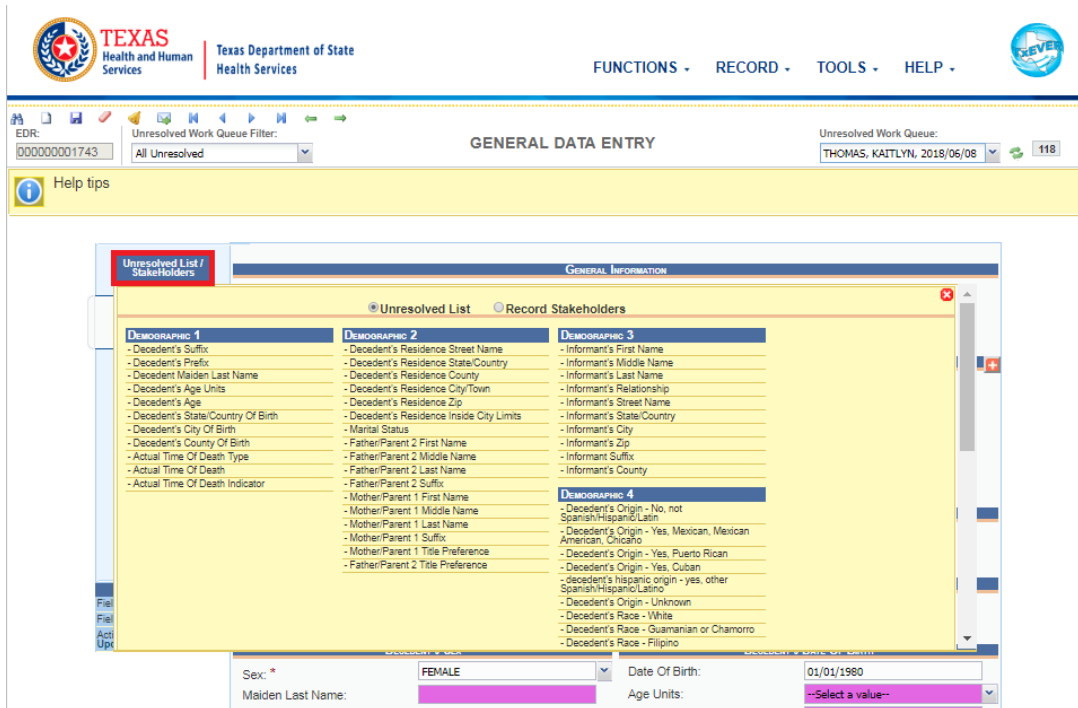


Figure 14: Unresolved Fields List

3. To be directed to a particular unresolved field, click the field’s link. The application will navigate to that particular field directly so that it may be resolved.
4. Click **Unresolved/StakeHolders** again to close the list and return to the data entry screen.

1.5 Exercise 5—Canceling Changes

This exercise provides an overview of how to cancel an update to a record in the death application. A user may cancel changes made to a record since it was last saved in **General Data Entry**.

To complete this exercise, the user will need to:

- ✓ Have the proper security process to access General Data Entry
- ✓ Open a saved record and make an update to a record without saving the change

To cancel changes made to a record:

1. While a record is on screen, select the **Record/Cancel** menu option or the  button.
2. The following message will load:

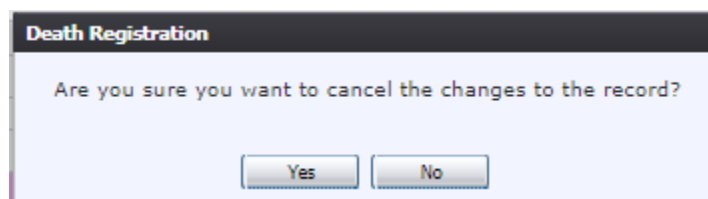



Figure 15: Cancel Changes Confirmation Message

3. Click **Yes** to confirm cancellation of the changes made to the record. The changes will be canceled and the record will be restored to its previously saved state.

1.6 Exercise 6—Update a Record

This exercise provides an overview of how to update a record in the death application. In order to perform this exercise, make sure you have partially completed records saved in the application.

To complete this exercise, the user will need to:

- ✓ Have the proper security process to access General Data Entry
1. While a record with unsaved changes is on screen, select the **Record/Save** menu option, or click the **Save** button .
 2. The message below will load:

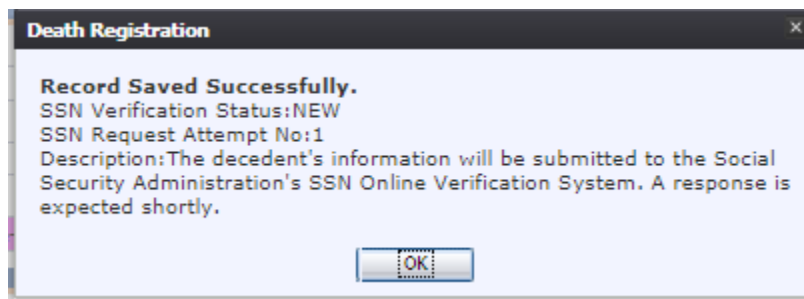



Figure 16: Record Update Confirmation Message

3. All previously unsaved changes made to the record will be saved.

1.7 Exercise 7—Abandoning a Record

This exercise provides an overview of how to abandon a record in the death application. Any user can choose to abandon a record up until the record is released and assigned a State File Number (SFN). If a record is released, a user can choose to void the record through Legal View.

In order to abandon a record:

1. Search for a record using the Search Screen or the Unresolved Work Queue.
2. Once the record is retrieved to the General Data Entry screen, select the **Record/Abandon** menu item or the Abandon  icon. The following message will appear:

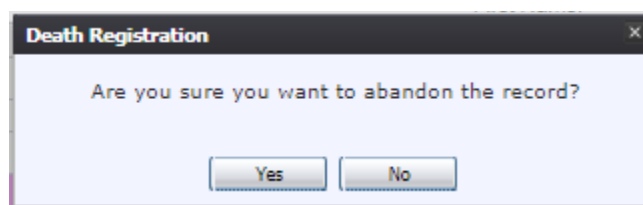


Figure 17: Record Abandon Confirmation Message

3. Select **No** to cancel the action and the user will return to the record. Select **Yes** to continue the Abandon Record Process. Provide a reason for abandoning the record in the comment

box:

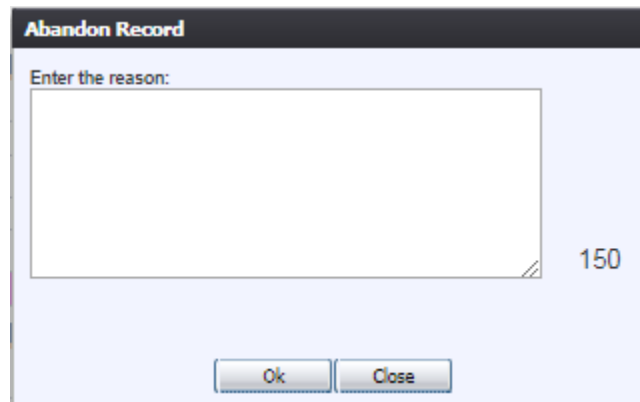


Figure 18: Abandon Record Comment Screen

4. After providing a comment and clicking **OK**, the following message will appear and the record will not appear in the Unresolved Work Queue any longer:

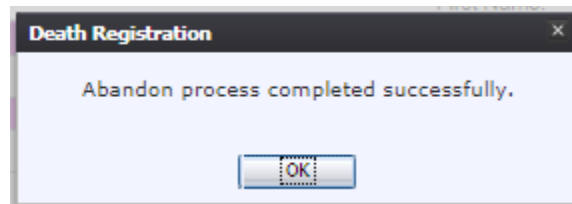


Figure 19: Abandon Completion Confirmation Message

1.8 Exercise 8—General Data Entry Topics

The objective of this exercise will be to complete data entry on a record so that it is available for the remaining exercises. Most of the data items that need to be completed will only require the Tab key to advance to the field, typing the necessary information and then pressing the Tab key to advance again. Drop-down list fields require the extra key-press of the Enter key to select an option from the list. Exercise 8 will only address certain fields or steps that involve some new functions.

To complete this exercise, you will need:

1.8.1 Double Data Entry

This exercise provides an overview of double data entry fields. The exercise focuses directly on the Decedent First Name field in order to illustrate the overall concept of double data entry fields.

1. Set focus on the Decedent First Name field under the Decedent's Legal Name section by clicking on the field. Type the name of the decedent and then press the **Tab** key.
2. Fields that require double data entry will present users with the screen in Figure 20 when the user tabs off the field:

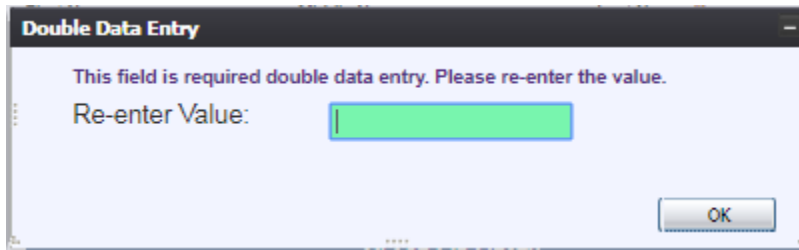


Figure 1: Double Data Entry Screen

3. Enter the value again and click the **OK** button to close the Double Data Entry screen.
4. If the value entered in the Double Data Entry screen matches the value entered on the main data entry screen, the user will be moved to the next data field. If the values do not match, the following message will appear:

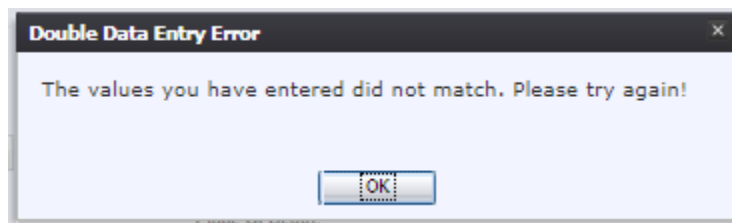


Figure 21: Double Data Entry Error Screen

5. Click **OK** to close the message and return to the data entry screen. The value entered into the field will be cleared and the double data entry process will be required again.

1.8.2 Pick List Navigation

This exercise provides an overview of pick-list menus. The exercise focuses directly on **Place of Death** fields (as shown below) in order to illustrate the overall concept of pick-list menus.

Figure 22: Place of Death Fields

1. Set focus on the **Type of Place of Death** field by clicking in the field. Open the drop-down list by clicking on the arrow symbol or by pressing the down arrow key on the keyboard.
 - Selecting from the drop-down is the standard approach when unfamiliar with the entries. Instead of opening the list, the user can also start typing the first letters of the entry to retrieve it.
2. After selecting an item from the pick list, press the **Tab** key to advance to the next field.

Mandatory fields and pick lists will change based on what item was selected for **Type of Place**.

1.8.3 Screen Tab Navigation

This exercise helps the user understand the concepts of screen tab navigation.

1. When the last field on the **Demographic 1** tab is resolved the next field that needs a response is on the **Demographic 2** tab.
2. Pressing **Tab** from the final field on the **Demographic 1** tab automatically advances the focus to the **Save** button at the bottom of the screen and the user can press **Tab** one more time and then press **Enter** on the keyboard to load the **Demographic 2** tab. The user can also navigate to various screen tabs by clicking on them with a mouse.

1.8.4 Place of Death Information

Once a type of place is selected, the address fields for a listed hospital are automatically populated. These types of fields are retrieved from the database and are referred to as bypassed and disabled. The address information of a given facility cannot be directly edited on the screen.



Figure 23: Place of Death Information

1.8.5 Certifier Profile

Certifier type and profile is based on the login profile of the user who originally initiated or picked up the record. The address fields are retrieved from the database and cannot be directly modified on the screen. However, the certifier name may be modified, which will cause the address fields to change.




Figure 24: Certifier Profile Screen

1.8.6 Ethnicity and Race Fields Properties

This exercise highlights the features and functionality of the Ethnicity and Race sections.

Ethnicity

1. The **Ethnicity** field allows one selection from the available options. Use the mouse or the **Spacebar** key to select an option. Use the **Tab** key and the **Shift + Tab** key to navigate to the desired choices and the **Spacebar** or the mouse to select or de-select.
2. To change the choice, the selected choice must first be unchecked by clicking on it again and then selecting a different choice.

The screenshot displays a form interface with a left-hand navigation menu and two main columns for data entry. The navigation menu includes sections for 'Unresolved / Stakeholders', 'Newborn', 'Mother', 'Mother Dem', and 'Mother Medical-1' through 'Mother Medical-4', 'Newborn Medical-1' through 'Newborn Medical-2', 'Certification', and 'Comments'. Below this is an 'ACTIVITY:' section showing '(Mother) No, Not Spanish/Hispanic/Latina. false', 'Field Status: Unresolved', and 'Action: New Record'. The main content area is divided into two panels: 'MOTHER'S ETHNICITY' and 'MOTHER'S RACE'. The 'MOTHER'S ETHNICITY' panel contains a list of radio button options: 'No, Not Spanish/Hispanic/Latina' (selected), 'Yes, Mexican, Mexican American, Chicano', 'Yes, Puerto Rican', 'Yes, Cuban', 'Yes, Other Hispanic (Specify)', and 'Unknown'. Below these is a 'Mother's Ethnicity MVR' dropdown menu. The 'MOTHER'S RACE' panel contains a list of radio button options: 'White', 'Black or African-American', 'American Indian or Alaska Native (Name of the Enrolled or Principal Tribe)', 'Asian Indian', 'Chinese', 'Filipino', 'Japanese', 'Korean', 'Vietnamese', 'Other Asian (Specify)', 'Native Hawaiian', 'Guamanian or Chamorro', 'Samoan', 'Other Pacific Islander (Specify)', 'Other (Specify)', and 'Unknown'. Below these is a 'Mother's Race MVR' dropdown menu.

Figure 25: Ethnicity and Race Fields

Race

1. Race fields allow multiple choices. Click on as many choices as apply.
2. Race checkbox fields can also be selected and de-selected using the mouse or the keyboard. Use the **Tab** key and the **Shift + Tab** key to navigate to the desired choices and the spacebar or the mouse to select or de-select.

1.8.7 AKA Names

This exercise highlights the features and functionality of the AKA Name fields.

1. Click on the **Add/Edit AKA Names** button (located next to the title bar of the Decedent's Legal Name fields section on Demographic 1 tab).

The screenshot shows a software interface with a sidebar on the left containing tabs for 'Demographic1' through 'Demographic5', 'Medical 1' through 'Medical 3', and 'Comments'. The main area is titled 'GENERAL INFORMATION' and contains fields for 'State File Number', 'Birth State File Number', and 'Record Type' (set to 'IDENTIFIED'). Below this is the 'DECEDENT'S LEGAL NAME' section, which includes fields for 'Prefix', 'First Name' (DEAN), 'Middle Name', 'Last Name' (THOMAS), and 'Suffix'. A red square button with a plus sign is located in the top right corner of this section. Further down are sections for 'DATE OF DEATH' and 'TIME OF DEATH' with various dropdown menus and text boxes.

Figure 26: Add AKA Names Button

2. Enter available names in the box that appears and click **Save/Update** to save the changes.

The screenshot shows a dialog box titled 'AKA Names'. It has four input fields: 'AKA First Name' (with a green highlight), 'AKA Middle Name', 'AKA Last Name', and 'AKA Suffix' (a dropdown menu). Below these fields are two buttons: 'Save/Update' and 'Close'. At the bottom of the dialog is a table with the following columns: 'First Name', 'Middle Name', 'Last Name', 'Suffix', and 'Remove'. The table is currently empty.

Figure 27: AKA Names Entry Field

1.8.8 Death Age Entry

Decedent's Date of Birth fields require entry in the Age Units and Age fields to determine record processing sequence.

1. With the mouse, click on the **Date of Birth** field and use the **Tab** key to advance to the **Age Units** field on the **Demographic 1** tab.

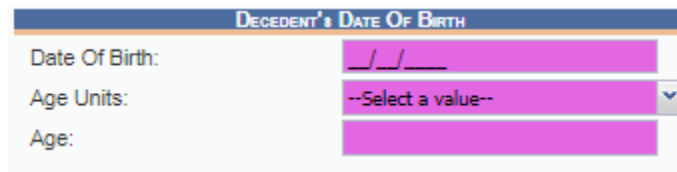


Figure 28: Decedent's Date of Birth Fields

2. If you haven't entered decedent's Date of Birth already, do so now, and press **Tab** to advance to the Age Units field.
3. In the Age Units field, use the mouse to click on the down arrow icon or use the **down arrow** key on the keyboard to open the list and select the appropriate age unit (years, months, days, hours, minutes).
4. Enter the decedent's age at the time of death. If the entered value does not coincide with the value calculated by the system by taking into account the birth and death dates, the following screen will be displayed:

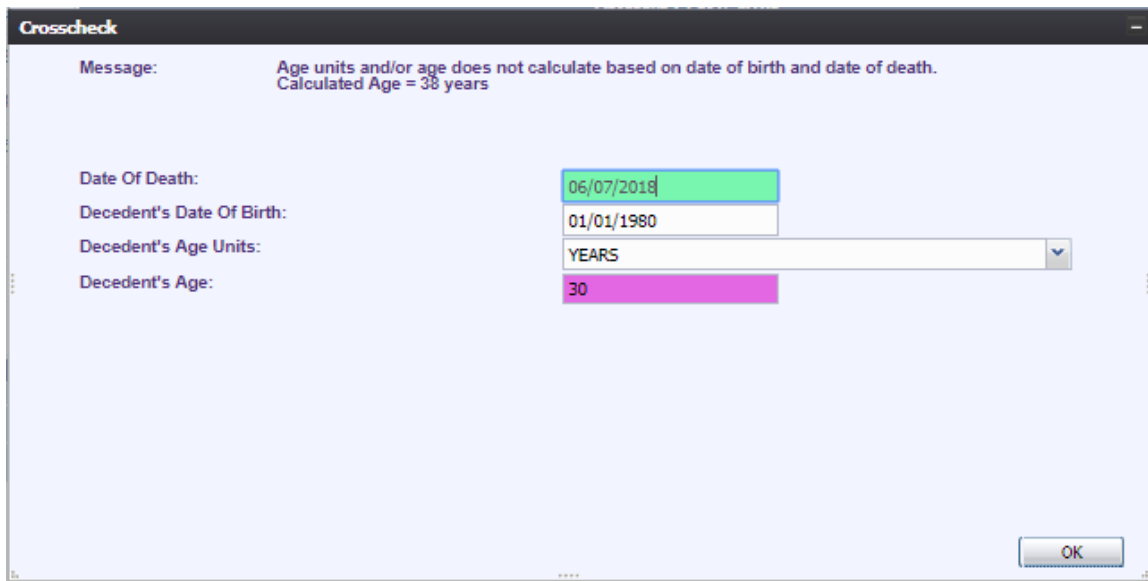


Figure 29: Decedent Date of Birth Crosscheck Screen

5. Correct the age and click **OK**. Use the **Tab** key to advance to the next field.

1.8.9 Funeral Facility Profile

In General Data Entry, the funeral facility will need to be selected from the **Facility Name** combo box. If a selection is made from the pick list, the address fields are retrieved from the database and cannot be directly modified on the screen.

Figure 30: Funeral Facility Profile Fields

1.8.10 Funeral Service Licensee

This is the individual associated with the Funeral Location who has demographically verified the record as the funeral director.

This is a drop-down type-ahead pick list that will contain only funeral directors associated with the Funeral Location on the record.

1.8.11 Additional Funeral Service Provider

Additional Service Provider field is associated with trade calls. These are cases where the funeral home of record (the funeral home responsible for filing the death certificate) is not providing all of the services for the family and the names of both funeral establishments need to be captured.

Example: if Jones Funeral Home is entered as the Additional Funeral Service Provider and Johnson Funeral Homes Inc is the funeral home that is responsible for filing the death certificate, the name of the additional funeral home will be entered in the Additional Funeral Service Provider field.

The license number of the funeral home that files the death certificate will print on the death certificate.

1.8.12 Certifier Fields

For In-House purposes, the certification has already taken place and the Certifier has already been identified on the paper document. However, a medical certifier office/practice will still need to be identified on the electronic record.

Selecting the medical certifier will also populate the Office/Practice on the record. Selecting a medical certifier will not cause an email message to be sent to the medical certifier when the data entry is performed in General Data Entry.

1. Retrieve a record that needs designation of a Medical Certifier using the **Search Screen** or through the **Work Queue**.

Note: Certain fields must be resolved before the medical certifier designation process can occur. If these fields are not completed, an alert message will appear.

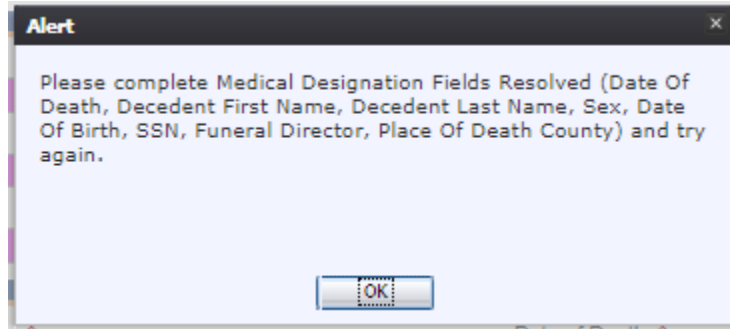


Figure 31: Medical Designation Alert Message

2. Navigate through the data entry screens to the Medical 4 data entry screen and select a value for the Certifier Type field. This will enable the Certifier Search and the **Search Certifier** button will become visible on the screen. Click the **Search Certifier** button.

Figure 32: Certifier Search Fields

3. The Medical Certifier Search Screen will load:

Figure 33: Certifier Search Screen

4. Enter information into all required search fields and then click **OK**. The search results grid will load all certifiers that match the entered search criteria.

The screenshot shows a web application window titled "Search - Certifier". It contains several search fields: "Type" (dropdown menu with "CERTIFYING PHYSICIAN" selected), "First Name" (text input), "Middle Name" (text input), "Last Name" (text input with "RIVER" entered), "County" (dropdown menu with "ABONA" selected), and "Certifier Office" (dropdown menu with "ABONA MEDICAL OFFICE" selected). Below these fields are "Search" and "Clear" buttons. A table displays the search results with the following data:

Physician Office Name	First Name	Middle Name	Last Name	Suffix	Street Number	Pre-Direction	Street Name	Street Type
ABONA MEDICAL OFFICE	DEAN		RIVER				123	

At the bottom of the table, there is a pagination control showing "Page 1 of 1" and "Displaying Records 1 - 1 of 1". Below the table are "OK" and "CANCEL" buttons.

Figure 34: Certifier Search Screen Completed

5. Select the desired medical certifier by clicking the associated row in the search results grid. The Certifier Search Screen will close and the medical certifier's information will populate in the medical certifier fields and the fields will disable.

1.9 Exercise 9—Overrides

The Override options in General Data Entry apply to records that have not been initiated in general data entry. Records that have been initiated in either Demographic Data Entry or Medical Data Entry (on the facility/medical office level) may need to have overrides applied as described in this section. General Data Entry provides a means to search for and display these records.

1.9.1 Taking Forceful Ownership of a Record

Certain authorized users may take forceful ownership of a record in their respective jurisdictions at any time it is found necessary to do so.

To take forceful ownership of a record:

1. Locate the record that you wish to take forceful ownership of through the Search Screen.
2. When the application loads the record in General Data Entry for the first time, the system will issue the following prompt:

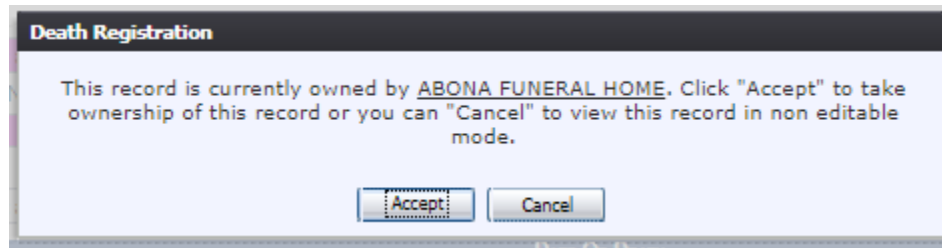


Figure 35: Take Ownership Confirmation Message

- a. Click **Accept** to take ownership of the record in order to edit the record.
 - b. Click **Cancel** to not take ownership of the record and view the record without editing it.
3. If you respond **Accept** to the above ownership acceptance prompt, you will become owner of the record and be able to perform tasks such as re-designating the medical certifier and relinquishing the funeral director.
 4. The application will confirm that the acceptance of the record ownership was successful with the following message:

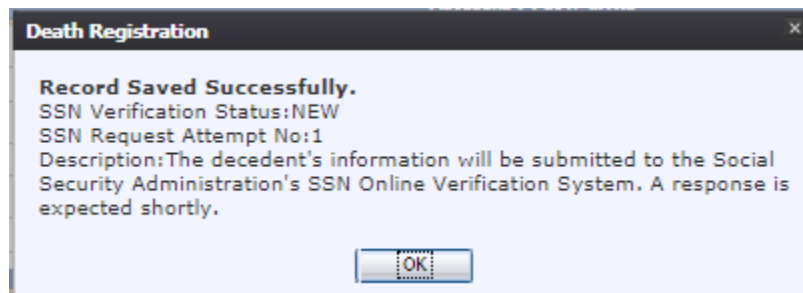


Figure 36: Record Saved Successfully Message

1.9.2 Re-Designate Medical Certifier

A General Data Entry user cannot forcefully re-designate a medical certifier on a record that already has a designated medical certifier unless the user takes forceful ownership of the record first.

To re-designate a Medical Certifier in General Data Entry:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps to take ownership of a record.
3. Select the **Record/Re-Designate Medical Certifier** menu item.
4. The following prompt will appear:

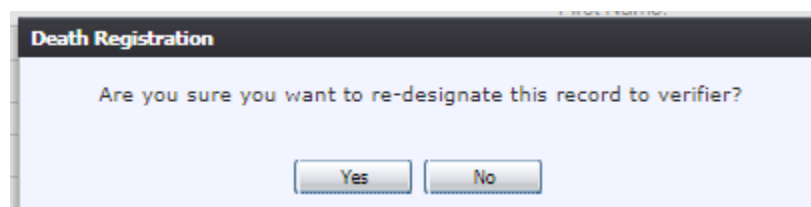


Figure 37: Re-Designate Confirmation Message

5. Click **Yes** to confirm that you wish to re-designate the medical certifier on the record.

1.9.3 Relinquish Funeral Director

In some cases it may be necessary to remove the associated funeral home and funeral director from a record so the record can be picked up by a different funeral home. This override will remove the present funeral home association to the record so the record available to be picked up by a different funeral home.

To relinquish a funeral director:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps to take ownership of a record.
3. Once the desired record has loaded, select the **Record/Relinquish** menu option. The following prompt will appear:

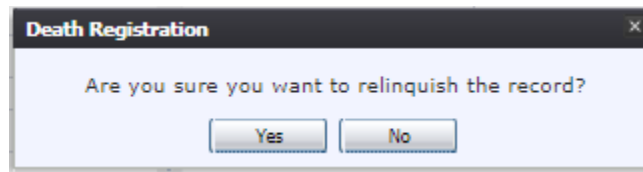


Figure 38: Relinquish the Record

4. Click **Yes** to confirm that you wish to relinquish the record and a comment box will appear:

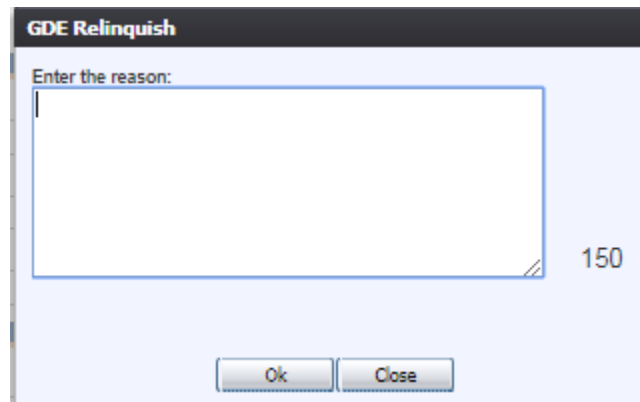


Figure 39: GDE Relinquish Reason Message

5. Enter a comment (150 characters) regarding the reason for relinquishing the record in the comment box.
6. Click **OK** to confirm the relinquishing of the record. The application will issue a message confirming that the relinquishing was successful.

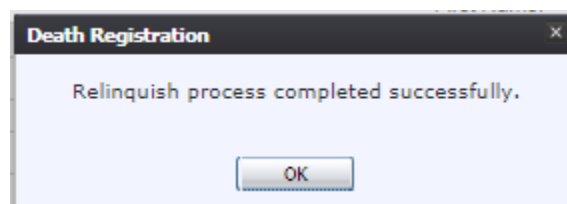


Figure 40: Relinquish Process Completed Successfully

1.9.4 Re-Designate Demographic Verifier

A General Data Entry user cannot forcefully re-designate a demographic verifier on a record that already has a designated demographic verifier unless the user takes forceful ownership of the record first.

To re-designate a Demographic Verifier in General Data Entry:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps to take ownership of a record.
3. Select the **Record/Re-Designate Demographic Verifier** menu option.
4. The following prompt will appear:

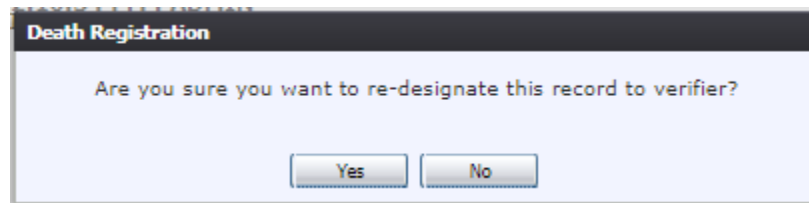


Figure 41: Re-Designate Record to Verifier

5. Click **Yes** to confirm that you wish to re-designate the demographic verifier on the record. The following screen will appear:

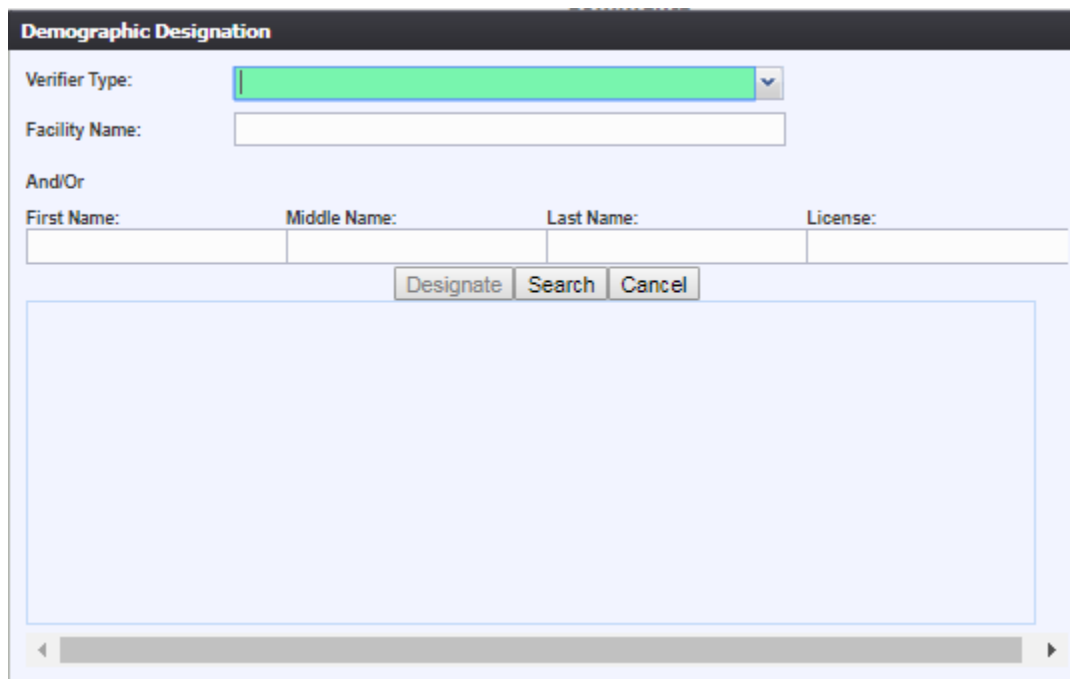
A screenshot of a software form titled 'Demographic Designation'. The form has a light blue background. At the top, there is a dropdown menu for 'Verifier Type' with a green highlight. Below it is a text input field for 'Facility Name:'. Underneath is the text 'And/Or'. Below that are four text input fields: 'First Name:', 'Middle Name:', 'Last Name:', and 'License:'. At the bottom of the form, there are three buttons: 'Designate', 'Search', and 'Cancel'. A large empty rectangular area is at the bottom of the form, and a scrollbar is visible at the very bottom.

Figure 42: Demographic Designation Screen

6. Enter the Verifier Type and the Facility Name or the Verifier's Name. Select the desired medical certifier by clicking the associated row in the search results grid. The Search Screen will close and the verifier's information will populate in the verifier fields and the fields will disable.

1.9.5 De-Verify

The State users cannot forcefully De-Verify any record. In order to de-verify a record, they must first take ownership of the record through General Data Entry. They may then De-Verify the record and make any necessary changes.

To de-verify a record:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps to take ownership of a record.
3. Once the desired record has loaded, select the **Record/De-Verify** menu item. The following prompt will load

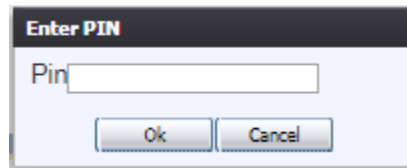


Figure 43: Enter PIN Message

4. Enter the PIN and click **OK**.
5. If the correct PIN is entered, the following message will load:

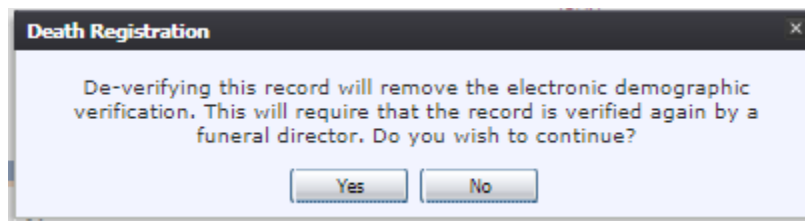


Figure 44: De-Verify Confirmation Message

6. Click **Yes** to confirm de-verification of the record and the comment box will load.

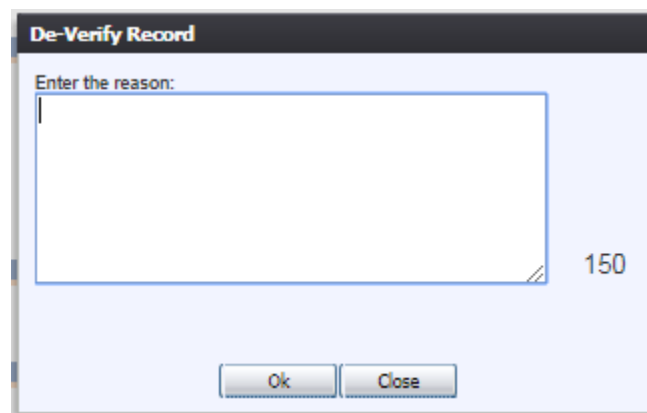


Figure 45: De-Verify Record Reason Message

7. Enter a comment (150 characters) regarding the reason for de-verification in the comment box.
8. Click the **OK** button to close the comment box. The application will issue the following message:

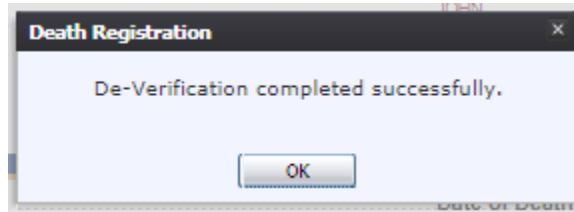


Figure 46: De-Verification Completed Successfully Message

1.9.6 De-Certify

State users may only de-certify a record. In order to do so, they must take ownership of the record through General Data Entry. They may then de-certify the record and make any necessary changes. The State may de-certify a record in order to refer it to a JP/Medical Examiner. De-Certification requires the entering of the user's PIN.

To de-certify a record:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps to take ownership of a record.
3. Once the desired record has loaded, select the **Record/De-Certify** menu option. The following prompt will load:

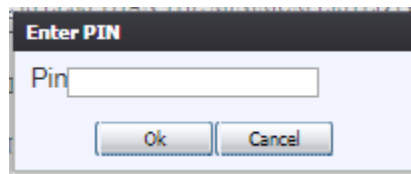


Figure 47: Enter PIN Message

4. Enter the PIN and click **OK**.
5. If the correct PIN is entered, the following message will appear:

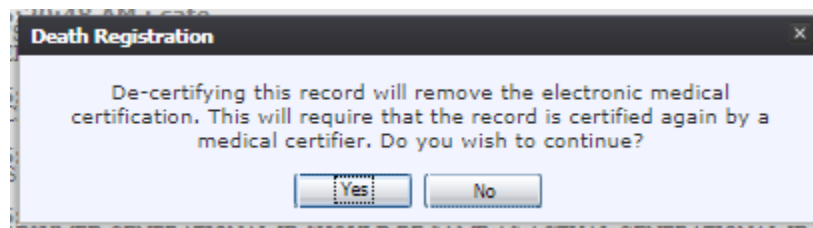


Figure 48: De-Certify Confirmation Message

6. Click **Yes** to confirm de-certification of the record and the comment box will load:

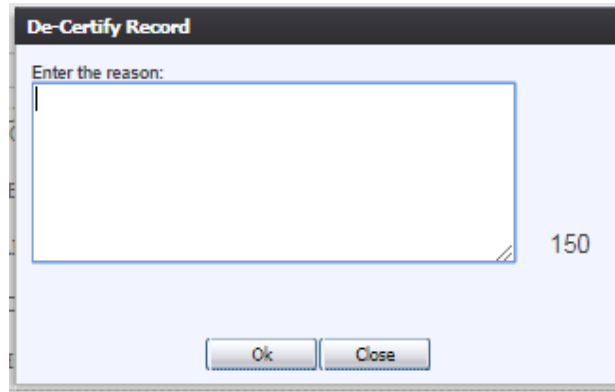


Figure 49: De-Certify Record Comment Box

7. Enter a comment (150 characters) regarding the reason for de-certification in the comment box.
8. Click the **OK** button to close the comment box. The application will issue the following message:

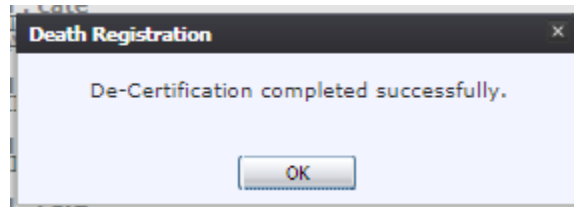


Figure 50: De-Certification Completed Successfully Message

1.10 Exercise 10—Release a Record

This exercise provides an overview of how to release records. After General Data Entry has been completed, a record is ready to be released and assigned a State File Number.

To release a record:

1. Retrieve an existing record using the Work Queue Search.
2. When the appropriate record appears on the screen, select the **Record/Release** menu item to initiate the release process. A message will appear requesting a PIN:

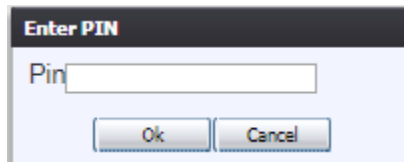


Figure 2: PIN Entry Screen

3. Enter the PIN and click on **OK**.
4. If the correct PIN is entered, the following message will load:

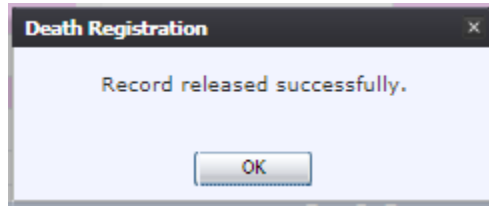


Figure 52: Record Released Successfully

2 Back Data Entry (BDE)

These exercises provide an overview of different processes in Back Data Entry.

To complete these exercises, the user will need:

- ✓ Access to Back Data Entry

2.1 Exercise 11—Access Back Data Entry

1. Select the **Death/Functions/Back Data Entry** menu item to initiate a new death record.

2.2 Exercise 12—Create a New Record


This exercise provides an overview of how to begin the Back Data Entry process as well as how to save a new record.

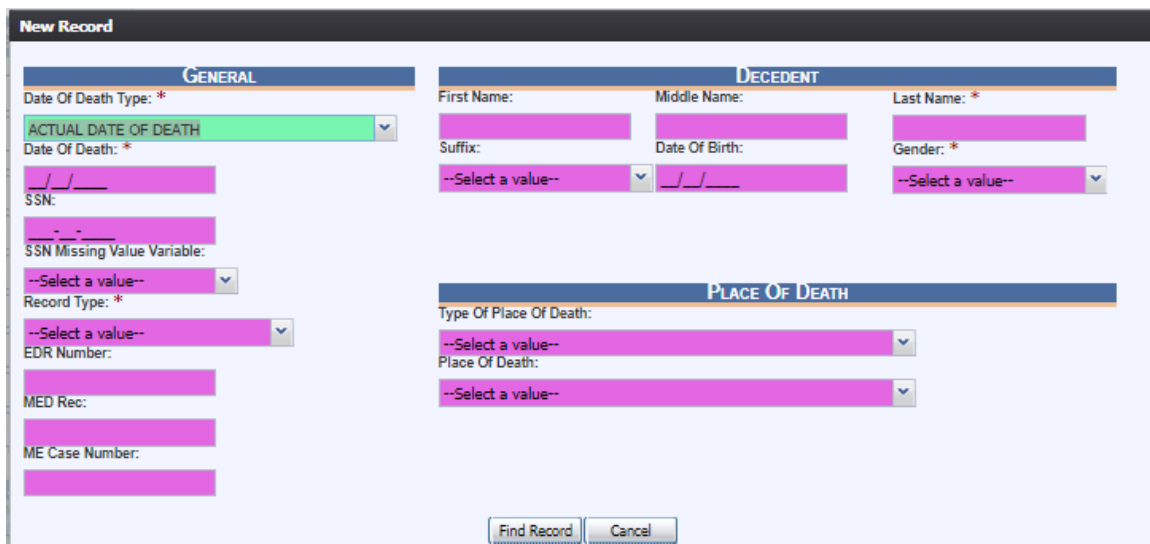
To complete this exercise, the user will need to:

- ✓ Have the proper security process to access Back Data Entry

The Back Data Entry function allows authorized users to create/initiate the following types of records:

- Delayed
- Out of State Death
- Legacy New

1. Go to **Death/Functions/Back Data Entry**. The **Back Data Entry Initial Load** screen will appear.
2. Click on the **New** icon  or select the **Record/New** menu option to initiate a new record. The **New Record Screen** will appear:



The screenshot shows the 'New Record' data entry screen. It is organized into three main sections: GENERAL, DECEDENT, and PLACE OF DEATH. The GENERAL section contains fields for Date Of Death Type (set to ACTUAL DATE OF DEATH), Date Of Death, SSN, SSN Missing Value Variable, Record Type, EDR Number, MED Rec, and ME Case Number. The DECEDENT section contains fields for First Name, Middle Name, Last Name, Suffix, Date Of Birth, and Gender. The PLACE OF DEATH section contains fields for Type Of Place Of Death and Place Of Death. At the bottom, there are 'Find Record' and 'Cancel' buttons.

Figure 53: New Record Data Entry Screen

3. The field focus is automatically set to the left side of the 'Date of Death Type' field on the new screen as indicated by the change of color of that field.
4. The Date of Death Type field will be defaulted to a value of Actual so this field may not need to be altered unless the Date of Death Type value is something other than Actual.
 - If the Date of Death Type is Actual press the Tab key on the keyboard to advance to the Date of Death field for this record.
 - If the Date of Death Type is not Actual you may change the field value using the keyboard— Type either an E (for estimated), F (for found), AP (for approximate), P (for presumed) or C (for court determined) and then press the Tab key to advance to the Date of Death field for this record.
5. Type the Date of Death for this record. Type only the numbers. You will see that the slashes are provided as you type. Press Tab to advance to the Social Security Number field.
6. For this exercise, leave the Social Security Number field blank and press Tab to advance to the SSN Missing Value Variable field. The Social Security Number is important if one is available.

Note: In live user of the application it will be required for the user to enter the decedent's social security number on the NEW screen (if the SSN is known).

7. The options for the SSN Missing Value Variable include: Unknown, Pending, None and Not Obtainable. Begin to type the word Unknown until the drop-down list opens and the word Unknown is highlighted.
 - To open the list when you don't know what options might be there you can press the Down Arrow key on your keyboard while focus is on the field but the list is not open.
 - With the word Unknown highlighted in the list, press the Enter key to select the highlighted choice and advance focus to the Record Type field.
8. With focus on Record Type, press the Down Arrow on the keyboard to highlight the option for Delayed.
9. Press Tab to select Delayed as the record type and advance to EDR Number.
10. Leave the EDR Number field blank and press Tab to advance. The EDR Number is important if there is one available.
11. Leave the Med Rec field blank and press Tab to advance.
12. Leave the ME Case Number field blank and press Tab to advance to the First Name field.
13. Type information for the decedent's first name and then press Tab to advance to the middle name and then repeat to complete the middle and last names. Tab from the last name field to

set focus on the Suffix field.

14. With focus on the Suffix field, type the letter J and then press Tab.
 - This is the keyboard approach to drop-down lists when you know the first few letters of the option you need. It will result in Jr being selected as the Suffix.
15. With focus on the Date of Birth field, hold down the Shift key and while it is held down press the Tab key.
 - Focus should return to the Suffix field. This is referred to as Shift+Tab and it moves focus back to the previous field.
16. With focus on the Suffix field containing Jr, press the Delete key to clear the contents of the field.
 - Once a drop-down field has a value in it you can use backspace or delete to erase the letters in order to make another selection.
17. With focus on the cleared Suffix field, press the Down Arrow on the keyboard to open the list and then use the down arrow to navigate until Sr is highlighted. When Sr is highlighted, press Tab to select it and advance to the Date of Birth field.
18. With focus on the Date of Birth field, enter the date of birth of the decedent. Type only the numbers.
19. Press the Tab key to advance from the date of birth field.
20. With focus on the Gender field, type the letters MA and then press Tab.
 - Highlights Male, selects Male, advances focus to Type of Place of Death
21. With focus on Type of Place of Death, press the Down Arrow on the keyboard to highlight the option for Hospital-Inpatient.
22. Press Tab to select Hospital-Inpatient as the type of place of death and advance to Place of Death.
23. With the Type of Place of Death set as Hospital-Inpatient and focus on the Place of Death type DALL

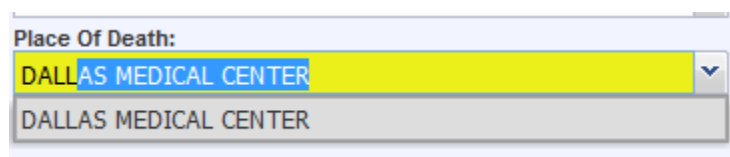


Figure 54: Place of Death Field

- This is an example of the Minds Eye drop-down functionality that allows you to simply type the response you are looking for. In most cases you will not need to type more than a few letters of the item you are looking for.
24. Press the down arrow once and then press Tab to select the highlighted choice DALLAS MEDICAL CENTER and press Tab to advance to the **Find Record** button.
25. Press Enter to execute the find record command.
- Although you are trying to create a NEW record, the system will always assume that the record may have already been created by a user at a different location. Death records may be created at the place of death and in some cases may have had the medical portion completed and medically certified. The information captured on the NEW screen has been carefully defined to optimize the likelihood of finding the matching record if one exists.
26. We will assume that the result in the present exercise is that a NEW record will be created. Press Enter to execute the OK command or use the mouse to point to the **OK** button and click once with the left mouse button.

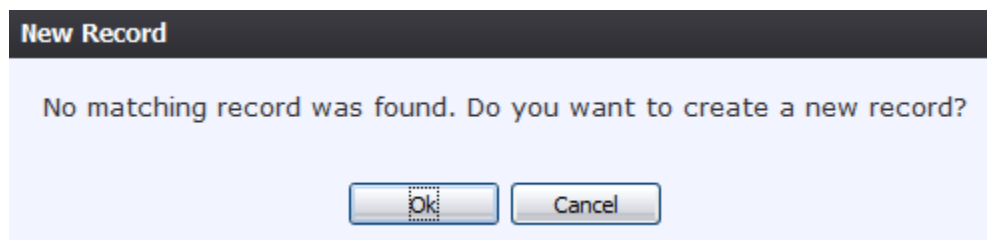


Figure 55: Record Creation Confirmation Message

27. The first tab of the Back Data Entry screen will appear. Use the mouse to point to the Save Record icon and then click once with the left mouse button to save the NEW record before continuing to complete the data entry.
- Clicking Save Record at this point rather than waiting until the entire record has been completed will accomplish three important things:
 - i. The information captured so far will be preserved and the record will be established in the database.
 - ii. The current session timer will be reset to prevent session time out messages.
 - iii. Assuming the decedent's social security number, name, date of birth and gender has been completed on the NEW screen, the Save action will initiate the process of verifying the decedent's SSN with the Social Security Administration. A response must be received from SSA regarding this verification before the record can be electronically filed with the State. Initiating the verification at this point will make it likely that the response will be back by the time the record is saved again or

searched for. Once a verification attempt is initiated the system automatically looks for a response each time the record is saved or retrieved.

2.3 Exercise 13—Search for a Legacy Record

This exercise provides an overview of how to search for a legacy record in the death application.

To complete this exercise, you will need to:


- ✓ Have the proper security process to access Back Data Entry

Searching for a record in the application can be accomplished using the following options:

- ✓ Search Screen
- ✓ Work Queue Search

2.3.1 Search Screen

The same search screen will apply to Demographic Data Entry, Medical Data Entry, General Data Entry, and Back Data Entry processes. However, the Search Screen functionality within Back Data Entry will only allow for users to search for existing legacy records.

1. Click the **Search** icon  or select the **Record/Search** menu item.
2. The **Search Record** screen will appear:

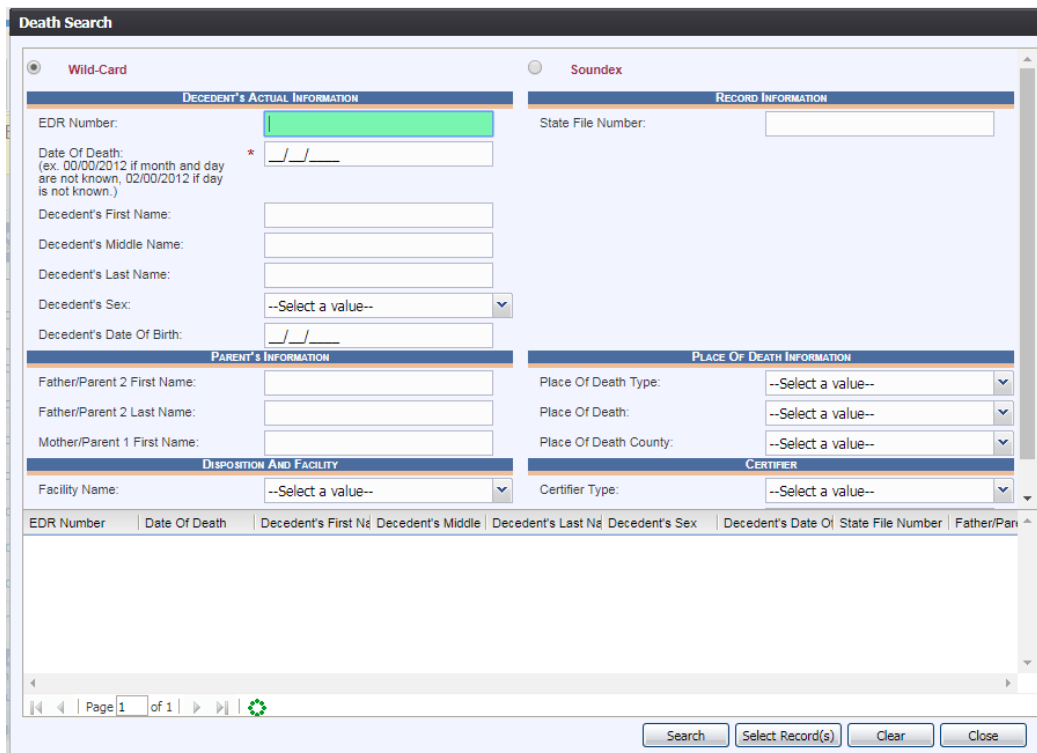


Figure 56: Death Search Screen

3. Enter all available information regarding the record. Decedent's date of death is a mandatory field.

- ✓ **Tip:** Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.
- ✓ **Tip:** Along with a name, including the year of death (which can be entered as a series of 00s followed by a year - i.e. 00/00/2012) and gender and other information will reduce the number of matches that are returned and faster search results.
- ✓ **Tip:** Choosing 'Soundex' still requires the user to enter at least the decedent's year of death. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound familiar as well.

4. Click **Search** to search the database.

5. Records that match the search criteria will load in the grid in the lower half of the screen.

The screenshot shows the 'Death Search' application window. It has two radio buttons at the top: 'Wild-Card' (selected) and 'Soundex'. The interface is divided into several sections for data entry:

- DECEDENT'S ACTUAL INFORMATION:** Includes fields for EDR Number, Date Of Death (with a green highlight on '00/00/2018'), Decedent's First Name, Middle Name, Last Name, Sex (dropdown), and Date Of Birth.
- RECORD INFORMATION:** Includes State File Number.
- PARENT'S INFORMATION:** Includes Father/Parent 2 First Name, Last Name, and Mother/Parent 1 First Name.
- PLACE OF DEATH INFORMATION:** Includes Place Of Death Type, Place Of Death, and Place Of Death County (all dropdowns).
- DISPOSITION AND FACILITY:** Includes Facility Name (dropdown).
- CERTIFIER:** Includes Certifier Type (dropdown).

At the bottom, there is a table of search results:

EDR Number	Date Of Death	Decedent's First Name	Decedent's Middle	Decedent's Last Name	Decedent's Sex	Decedent's Date Of	State File Number	Father/Pari
00000000204	01/24/2018	SAM	P	LONA	UNKNOWN		111111111111111	
00000000235	01/26/2018	LEGACY		LEGACY	FEMALE	01/01/1990	888888888888888	

Below the table is a pagination bar showing 'Page 1 of 1' and a 'Displaying Records 1 - 2 of 2' indicator. At the bottom right are buttons for 'Search', 'Select Record(s)', 'Clear', and 'Close'.

Figure 57: Death Search Screen with Results

5. Click **Select Records** to load records to the work queue.
6. Select a record from the work queue.
7. The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional review and/or processing.

2.3.2 Back Data Entry Work Queue

The **Back Data Entry** process will contain a work queue that is populated by records for which all applicable data entry processes have not yet been completed.

The list in the work queue will be sorted by the date of death and will display the decedent's last name, decedent's first name, and date of death.

1. Select **All Unresolved** from the work queue filter drop-down list.
2. From the **Unresolved** work queue, select the appropriate record by clicking on it or, with focus on the list, start typing the decedent's last name (if available).
3. The selected record will be retrieved by the system and its information will appear on the screen.

2.4 Exercise 14—Using the Unresolved Fields List

This exercise provides an overview of how to check and use the Unresolved Fields List. To check if all data items were completed, user the Unresolved List to identify areas that require some sort of action before the record is resolved.

To complete this exercise, the user will need to:

- ✓ Access the Back Data Entry screen
- ✓ Search for a record using the Search Screen or the Unresolved Work Queue

To view the Unresolved Fields List:

1. Retrieve an existing record.
2. Click the **Unresolved/Stakeholders** button to open the Unresolved Fields list.

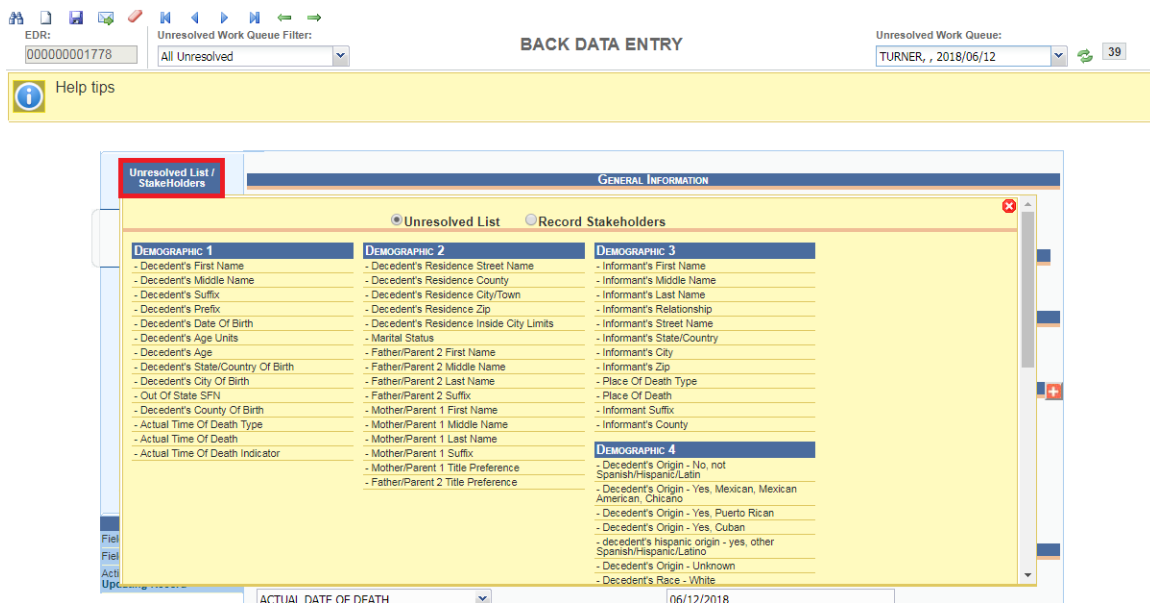


Figure 58: Unresolved Fields List

3. To be directed to a specific unresolved field, click the field's link. The application will navigate to that particular field directly so that it may be resolved.
4. Click **Unresolved/Stakeholders** again to close the list and return to the **Data Entry** screen.

2.5 Exercise 15—Canceling Changes

This exercise provides an overview of how to cancel an update to a record in the death application. A user may cancel changes made to a record since it was last saved in **Back Data Entry**.

To complete this exercise, the user will need to:

- ✓ Have the proper security process to access Back Data Entry
- ✓ Open a saved record and make an update to a record without saving the change

To cancel changes made to a record:

1. While a record is on screen, select the **Record/Cancel** menu option or click the  icon.
2. The following message will appear:

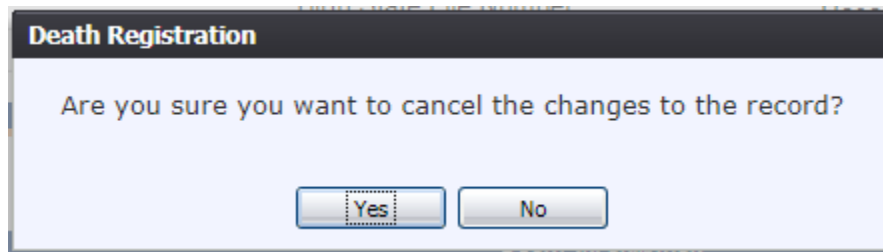


Figure 59: Cancel Changes Confirmation Message

3. Click **Yes** to confirm the cancellations of the changes made to the record. The changes will be canceled and the record will be restored to its previously saved state.

2.6 Exercise 16—Abandon a Record in Back Data Entry

This exercise provides an overview of how to abandon a record in the death application. Any user can choose to abandon a record up until the record is released and assigned a State File Number (SFN). If a record is released, a user can choose to void the record through Legal View.

In order to abandon a record:

1. Search for a record using the Search Screen or the Work Queue.
2. Once the record is retrieved to the **Back Data Entry** screen, select the **Record/Abandon** menu item. The following message will appear:

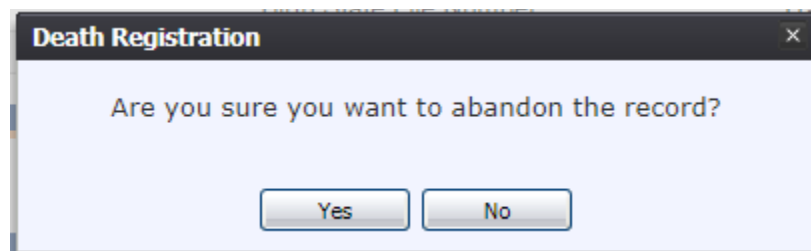


Figure 60: Record Abandon Confirmation Message

- a. Select **No** to cancel the action and return to the record.
- b. Select **Yes** to continue abandoning the record. Provide a reason for abandoning the record in the **Comment** box that will appear.

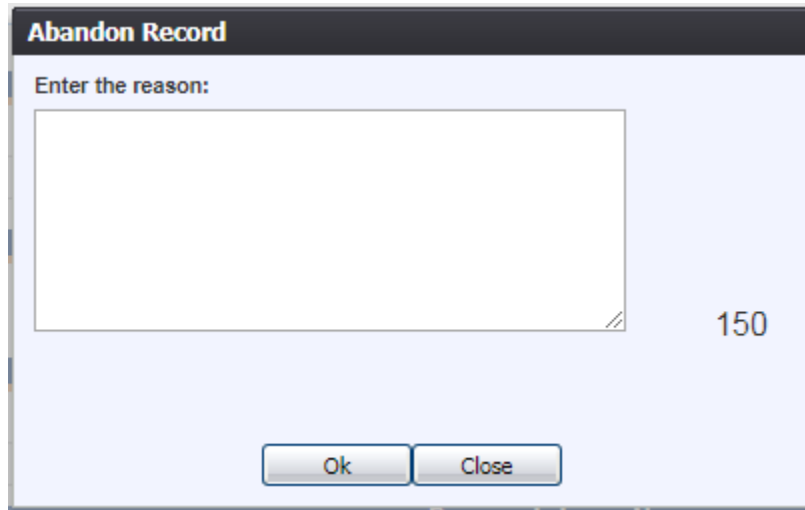


Figure 61: Abandon Record Comment Screen

3. After providing a comment and clicking **OK**, the following message will appear and the record will be removed from the Unresolved Work Queue.

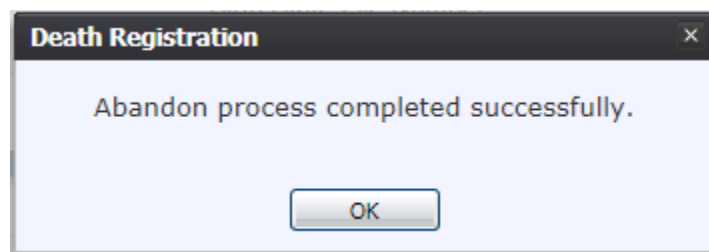


Figure 62: Record Abandon Completion Confirmation Message

2.7 Exercise 17—Back Data Entry Topics

The objective of this exercise will be to complete data entry on a record so that it is available for the remaining exercises. Most of the data items that need to be completed will only require the Tab key to advance to the field, typing the necessary information and then pressing the Tab key to advance again. Drop-down list fields require the extra key-press of the Enter key to select an option from the list. Exercise 17 will only address certain fields or steps that involve some new functions.

2.7.1 Record Types

When a **New** record is initiated in Back Data Entry, the user must indicate a Record Type. Some rules will relate to specific record types as noted below.

Delayed

A Delayed Record is any record that is filed more than one year after the date of death. Delayed Records may have different data associated with them than a regular death certificate and may contain no cause of death information.

Out of State

An Out of State Record can be a record where the decedent is either a Texas citizen whose place of death was outside the state of Texas, or an out of state citizen whose place of death was a location in Texas.

Legacy

Records of this type can either be indexed records that have been imported into the TxEVER system as a result of initial data conversion or records that are initiated in Back Data Entry as new legacy records.

Indexed Legacy Records

Once the user has retrieved a legacy record in the system through a search, the user may add additional information to the electronic version of the legacy record. Once released from the back data entry process, such records will then be considered as fully electronic records and as such will not be issued from paper. After the record is released from Back Data Entry, the legacy record indicator will be removed. There will be no net-change history maintained until after the record is registered.

New Legacy Records

If the user is unsuccessful in locating a legacy record through the Back Data Entry search, the user may choose to create a new legacy record and enter all available information. A record that is initiated as a new legacy record will provide the user with the ability to manually enter an SFN into the system rather than having the system automatically assign an SFN.

2.7.2 AKA Names

This exercise highlights the features and functionality of the AKA Name fields.

1. Click on the **Add/Edit AKA Names** button (located next to the title bar of the Decedent's Legal Name fields section on Demographic 1 tab).

The screenshot displays the 'BACK DATA ENTRY' interface. At the top, there are navigation icons, an EDR field with the value '00000001781', an 'Unresolved Work Queue Filter' dropdown, and an 'Unresolved Work Queue' indicator showing '0'. A yellow banner below the header contains an information icon and the text 'Please enter Out Of State SFN'. The main content area is divided into a left sidebar with tabs for 'Unresolved List / Stakeholders', 'Demographic1' through 'Demographic5', 'Medical 1' through 'Medical 3', and 'Comments'. The 'Demographic1' tab is active, showing several sections: 'GENERAL INFORMATION' with fields for 'State File Number', 'Birth State File Number', and 'Record Type' (set to 'OUT OF STATE DEATH'); 'OUT OF STATE SFN' with a green input field; 'COURT INFORMATION' with fields for 'Court Name', 'Case Number', and 'Court Date'; 'DECEDENT'S LEGAL NAME' with fields for 'Prefix', 'First Name', 'Middle Name', 'Last Name' (set to 'MACK'), and 'Suffix'; and 'DATE OF DEATH' with fields for 'Date of Death Type' (set to 'ACTUAL DATE OF DEATH') and 'Date of Death' (set to '06/12/2018'). A red box highlights a small square button with a plus sign in the top right corner of the 'DECEDENT'S LEGAL NAME' section.

Figure 63: Add AKA Names Button

2. Enter available names in the box that appears and click **Save/Update** to save the changes.

Figure 64: AKA Names Entry Field

2.7.3 Pick List Navigation

This exercise provides an overview of pick-list menus. The exercise focuses directly on **Place of Death** fields (as shown below) in order to illustrate the overall concept of pick-list menus.

Figure 65: Place of Death Fields

1. Set focus on the **Type of Place of Death** field by clicking in the field. Open the drop-down list by clicking on the arrow symbol or by pressing the down arrow key on the keyboard.
 - Selecting from the drop-down is the standard approach when unfamiliar with the entries. Instead of opening the list, the user can also start typing the first letters of the entry to retrieve it.
2. After selecting an item from the pick list, press the **Tab** key to advance to the next field. Mandatory fields and pick lists will change based on what item was selected for **Type of Place**.

2.7.4 Screen Tab Navigation

This exercise helps the user understand the concepts of screen tab navigation.

1. When the last field on the **Demographic 1** tab is resolved the next field that needs a response is on the **Demographic 2** tab.
2. Pressing **Tab** from the final field on the **Demographic 1** tab automatically advances the focus to the **Save** button at the bottom of the screen and the user can press **Tab** one more time and then press **Enter** on the keyboard to load the **Demographic 2** tab. The user can also navigate to various screen tabs by clicking on them with a mouse.

2.7.5 Place of Death Information

Once a type of place is selected, the address fields for a listed hospital are automatically populated. These types of fields are retrieved from the database and are referred to as bypassed and disabled. The address information of a given facility cannot be directly edited on the screen.

Figure 66: Place of Death Information

2.7.6 Death Age Entry

Decedent's Date of Birth fields require entry in the Age Units and Age fields to determine record processing sequence.

1. With the mouse, click on the **Date of Birth** field and use the **Tab** key to advance to the **Age Units** field on the **Demographic 1** tab

Figure 67: Decedent's Date of Birth Fields

2. If you haven't entered decedent's Date of Birth already, do so now, and press **Tab** to advance to the Age Units field.
3. In the Age Units field, use the mouse to click on the down arrow icon or use the **down arrow** key on the keyboard to open the list and select the appropriate age unit (years, months, days, hours, minutes).
4. Enter the decedent's age at the time of death. If the entered value does not coincide with the value calculated by the system by taking into account the birth and death dates, the following screen will be displayed:

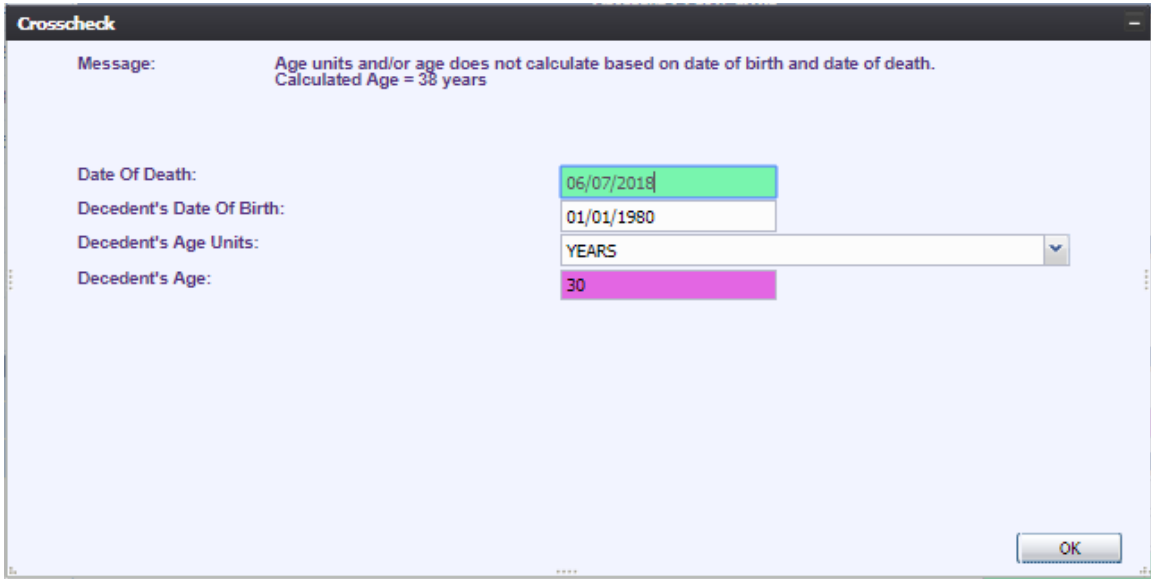


Figure 68: Decedent Date of Birth Crosscheck Screen

6. Correct the age and click **OK**. Use the **Tab** key to advance to the next field.

2.7.7 Funeral Facility Profile

In Back Data Entry, the funeral facility will need to be selected from the Facility Name combo-box. If a selection is made from the pick list, the address fields are retrieved from the database and cannot be directly modified on the screen.

Figure 69: Funeral Facility Profile

2.7.8 Funeral Service Licensee

This is the individual associated with the Funeral Location who has demographically verified the record as the funeral director.

This is a drop-down type-ahead pick list that will contain only funeral directors associated with the Funeral Location on the record.

2.7.9 Additional Funeral Service Provider

Additional Service Provider field is associated with trade calls. These are cases where the funeral home of record (the funeral home responsible for filing the death certificate) is not providing all of the services for the family and the names of both funeral establishments need to be captured.

Example: if Jones Funeral Home is entered as the Additional Funeral Service Provider and Johnson Funeral Homes Inc is the funeral home that is responsible for filing the death certificate, the name of the additional funeral home will be entered in the Additional Funeral Service Provider field.

The license number of the funeral home that files the death certificate will print on the death certificate.

2.7.10 Ethnicity and Race Field Properties

This exercise highlights the features and functionality of the Ethnicity and Race sections.

Ethnicity

1. The **Ethnicity** field allows one selection from the available options. Use the mouse or the **Spacebar** key to select an option. Use the **Tab** key and the **Shift + Tab** key to navigate to the desired choices and the **Spacebar** or the mouse to select or de-select.
2. To change the choice, the selected choice must first be unchecked by clicking on it again and then selecting a different choice.

Unresolved / StakeHolders	MOTHER'S ETHNICITY	MOTHER'S RACE
Newborn	<input checked="" type="checkbox"/> No, Not Spanish/Hispanic/Latina	<input type="checkbox"/> White
Mother	<input type="checkbox"/> Yes, Mexican, Mexican American, Chicano	<input type="checkbox"/> Black or African-American
Mother Dem	<input type="checkbox"/> Yes, Puerto Rican	<input type="checkbox"/> American Indian or Alaska Native (Name of the Enrolled or Principal Tribe)
Mother Medical-1	<input type="checkbox"/> Yes, Cuban	<input type="checkbox"/> Asian Indian
Mother Medical-2	<input type="checkbox"/> Yes, Other Hispanic (Specify)	<input type="checkbox"/> Chinese
Mother Medical-3	<input type="checkbox"/> Unknown	<input type="checkbox"/> Filipino
Mother Medical-4	Mother's Ethnicity MVR --Select a value--	<input type="checkbox"/> Japanese
Newborn Medical-1		<input type="checkbox"/> Korean
Newborn Medical-2		<input type="checkbox"/> Vietnamese
Certification		<input type="checkbox"/> Other Asian (Specify)
Comments		<input type="checkbox"/> Native Hawaiian
ACTIVITY:		<input type="checkbox"/> Guamanian or Chamorro
(Mother) No, Not Spanish/Hispanic/Latina: false		<input type="checkbox"/> Samoan
Field Status: Unresolved		<input type="checkbox"/> Other Pacific Islander (Specify)
Action: New Record		<input type="checkbox"/> Other (Specify)
		<input type="checkbox"/> Unknown
		Mother's Race MVR --Select a value--

Figure 70: Ethnicity and Race Fields

Race

1. Race fields allow multiple choices. Click on as many choices as apply.
2. Race checkbox fields can also be selected and de-selected using the mouse or the keyboard. Use the **Tab** key and the **Shift + Tab** key to navigate to the desired choices and the spacebar or the mouse to select or de-select.

2.7.11 Certifier Fields

For In-House purposes, the certification has already taken place and the Certifier has already been identified on the paper document. However, a medical certifier office/practice will still need to be identified on the electronic record.

Selecting the medical certifier will also populate the Office/Practice on the record. Selecting a medical certifier will not cause an email message to be sent to the medical certifier when the data entry is performed in Back Data Entry.

1. Retrieve a record that needs designation of a Medical Certifier using the **Search Screen** or through the **Work Queue**.
2. Navigate through the data entry screens to the Medical 1 data entry screen and select a value for the Certifier Type field. This will enable the Certifier Search and the **Search Certifier** button will become visible on the screen. Click the **Search Certifier** button.

The screenshot shows a data entry form titled "CERTIFIER". On the left side, there are several fields: "Certifier Type" (a dropdown menu with "CERTIFYING PHYSICIAN" selected), "Certifier Office Name" (a text input field), "Street Address" (a text input field), "County" (a dropdown menu with "--Select a value--"), "Zip" (a dropdown menu with "--SELECT A VALUE--"), and "Certifier License" (a text input field). On the right side, there are: "Certifier Name" (a dropdown menu with "--Select a value--" highlighted in pink, and a red box around a search icon), "Certifier Title" (a text input field), "State/Country" (a dropdown menu with "--Select a value--"), "City/Town" (a dropdown menu with "--Select a value--"), "Zip Ext" (a text input field), and "Date Certifier Signed" (a date input field with a pink background and "--/"/"--").

Figure 71: Certifier Search Fields

3. The Medical Certifier Search Screen will load:

Search - Certifier

Type * CERTIFYING PHYSICIAN

First Name

Middle Name

Last Name *

County --Select a value--

Certifier Office --Select a value--

Search Clear

OK CANCEL

Figure 72: Certifier Search Screen

4. Enter information into all required search fields and then click **OK**. The search results grid will load all certifiers that match the entered search criteria.

Search - Certifier

Type * CERTIFYING PHYSICIAN

First Name

Middle Name

Last Name * RIVER

County ABONA

Certifier Office ABONA MEDICAL OFFICE

Search Clear

Physician Office Name	First Name	Middle Name	Last Name	Suffix	Street Number	Pre-Direction	Street Name	Street Type
ABONA MEDICAL OFFICE	DEAN		RIVER				123	

Page 1 of 1

Displaying Records 1 - 1 of 1

OK CANCEL

Figure 33: Certifier Search Screen Completed

5. Select the desired medical certifier by clicking the associated row in the search results grid. The Certifier Search Screen will close and the medical certifier's information will populate in the medical certifier fields and the fields will disable.

2.8 Exercise 18—Release a Record in Back Data Entry

After a record has been completed in Back Data Entry, it must be released in order to be assigned a State File Number and be a registered record in the State of Texas.

To release a record from Back Data Entry:

1. Retrieve an existing record using the Search Screen or the Work Queue.
2. When the appropriate record is on the screen, select the **Record/Release** menu option to initiate the release process. The following message will appear:

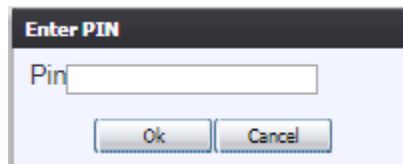


Figure 74: PIN Entry Screen

3. Enter the PIN and click on **OK**.
4. If the correct PIN is entered, the following message will load:

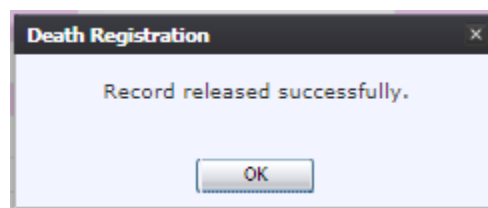


Figure 75: Record Released Successfully

3 Local Print Queue

These exercises provide an overview of different processes in Local Print Queue.

To complete these exercises, the user will need:

- ✓ Recently registered records that are ready for batch printing
- ✓ The proper security process to access Local Print Queue

3.1 Exercise 19—Access Local Print Queue

Access the **Local Print Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Print Queue**.

3.2 Exercise 20—Search for Records Previously Not Printed

1. Access the **Local Print Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Print Queue**.
2. Select the desired group of records for printing from the Document Filter. Options are:
 - All Death Documents
 - Newly Registered Records
 - Medical Amendment
 - Void Notices
 - Notice of Do Not Issue
 - Disinterment Permit
 - Death Amendments
3. Leave **All Previously Not Printed** radio selected to view all records ready to be printed.

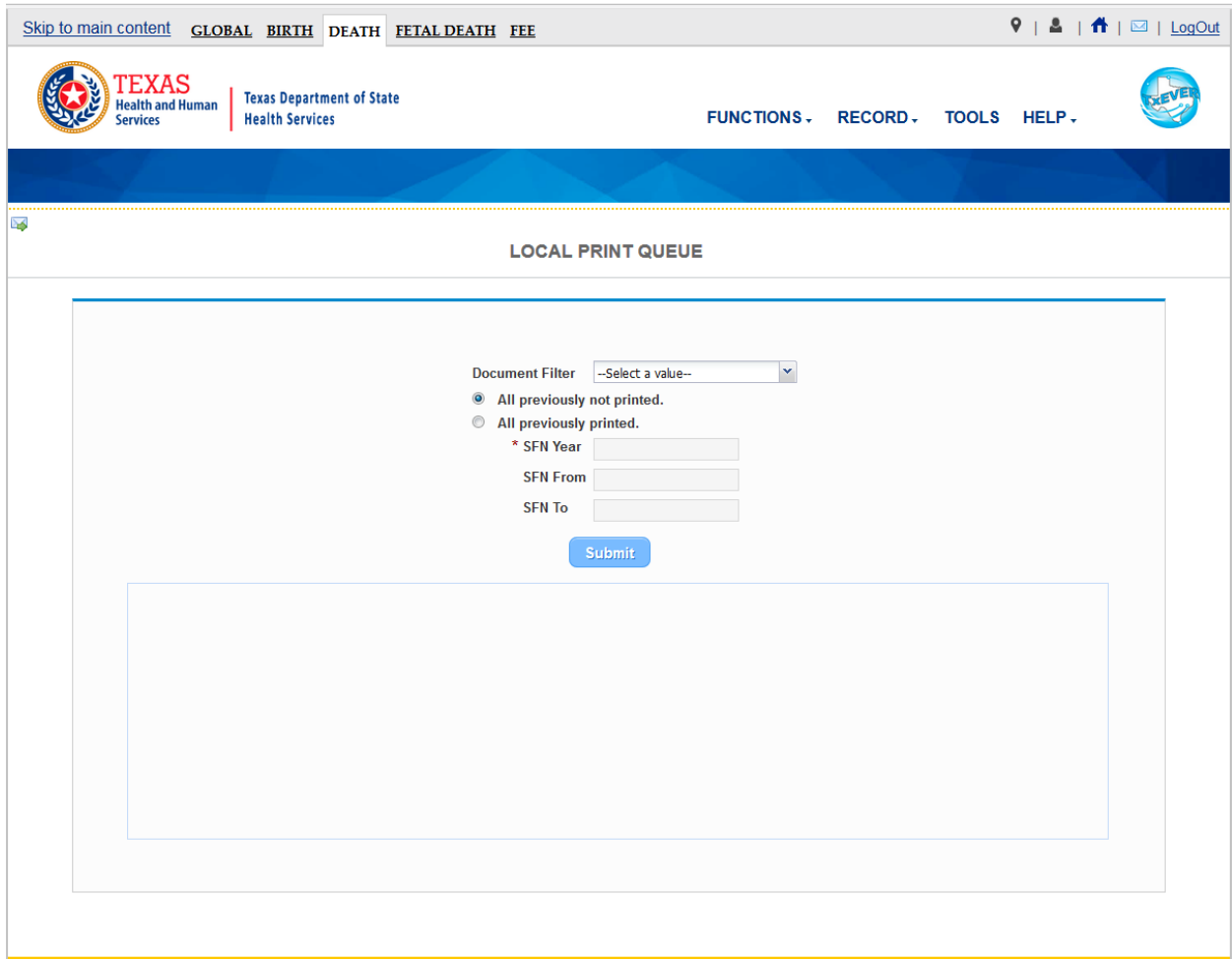


Figure 76: Local Print Queue Screen

4. Click the **Submit** button to load all records that have not been previously printed in the search results grid.

LOCAL PRINT QUEUE

Document Filter: ALL DEATH DOCUMENTS

All previously not printed.
 All previously printed.

* SFN Year:

SFN From:

SFN To:

Submit

Select	Document Type	State File Number	State File Date	Local File Number	Local File Date	State Print	Local Print	Facility Name	Deceden
<input type="checkbox"/>	View Details	AMENDED RECORD 0000202017	05/03/2018	000502	05/18/2018	PRINTED	UNPRINTED	ALL FAITHS FUNERAL HOME- TREE, CR	
<input type="checkbox"/>	View Details	AMENDED RECORD 0000212017	05/17/2018	000501	05/18/2018	PRINTED	UNPRINTED	ALL FAITHS FUNERAL HOME- RABBITT, E	
<input type="checkbox"/>	View Details	NEWLY REGISTERE 0002502018	05/03/2018	000515	05/18/2018	PRINTED	UNPRINTED	ALL FAITHS FUNERAL HOME- ABONE, I	
<input type="checkbox"/>	View Details	VOID NOTICE 0002042018	03/14/2018	000502	04/23/2018	Printed	Unprinted	GOLDEN GATE FUNERAL HOI UNKNOW	
<input type="checkbox"/>	View Details	NEWLY REGISTERE 0002212018	03/19/2018	000506	04/26/2018	PRINTED	UNPRINTED	ALL FAITHS FUNERAL HOME- MCCART	
<input type="checkbox"/>	View Details	NEWLY REGISTERE 0002332018	04/10/2018	000507	04/26/2018	PRINTED	UNPRINTED	GOLDEN GATE FUNERAL HOI RABBIT, I	
<input type="checkbox"/>	View Details	NOTICE OF DO NOT 0002222018	03/19/2018	000189	04/04/2018	Printed	Printed	ALL FAITHS FUNERAL HOME- GAYCIE,	
<input type="checkbox"/>	View Details	VOID NOTICE 0002292018	04/02/2018	000200	04/18/2018	Printed	Unprinted	WEED-CORLEY-FISH FH SOU1 SMOKED	

Page 1 of 1

Displaying Records 1 - 17 of 17

Print **Clear**

Figure 77: State Batch Print with Records Loaded

3.3 Exercise 21—Search for Records Previously Printed

1. Access the **Local Print Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Print Queue**.
2. Select the desired group of records for printing by selecting the **All Previously Printed** radio button and entering in the desired search criteria:

LOCAL PRINT QUEUE

Document Filter: ALL DEATH DOCUMENTS

All previously not printed.
 All previously printed.

* SFN Year: 2018

SFN From: []

SFN To: []

Submit

Select	Document Type	State File Number	State File Date	Local File Number	Local File Date	State Print	Local Print	Facility Name	Deceden
<input type="checkbox"/>	View Details	AMENDED RECORD 0002152018	03/19/2018	000182	04/02/2018	PRINTED	PRINTED	GOLDEN GATE FUNERAL HOI	CHERRY,
<input type="checkbox"/>	View Details	NEWLY REGISTERE 0002032018	03/14/2018	000501	04/23/2018	PRINTED	PRINTED	GOLDEN GATE FUNERAL HOI	DOE, JAN
<input type="checkbox"/>	View Details	NEWLY REGISTERE 0002362018	04/10/2018	000503	04/23/2018	PRINTED	PRINTED	GOLDEN GATE FUNERAL HOI	MORN, S
<input type="checkbox"/>	View Details	NOTICE OF DO NOT 0002222018	03/19/2018	000189	04/04/2018	Printed	Printed	ALL FAITHS FUNERAL HOME-	GAYCIE,
<input type="checkbox"/>	View Details	NEWLY REGISTERE 0002472018	04/30/2018	000509	04/30/2018	PRINTED	PRINTED	FINAL DESTINATION FUNERAL	PERSON,
<input type="checkbox"/>	View Details	NEWLY REGISTERE 0002732018	06/12/2018	* 000501	06/12/2018	PRINTED	PRINTED	ALL FAITHS FUNERAL HOME-	DAY, MO

Page 1 of 1 | | Displaying Records 1 - 6 of 6

Print **Clear**

Figure 78: State Batch Print-Search for Previously Printed Records

3. Click the **Submit** button to load all previously printed records that match the search criteria in the search grid. Clicking the **Clear** button will clear the search results and the search fields.

3.4 Exercise 22—Print Records

1. Access the **Local Print Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Print Queue**.
2. Select the desired group of records for printing by entering the selected criteria into the search fields.
3. Click the **Submit** button to load all records that match the search criteria in the search grid.
4. Select all records for printing by clicking the **Select checkbox** located in the header of the Select column in the search results grid or click the select checkbox for individual records:



LOCAL PRINT QUEUE

Document Filter: ALL DEATH DOCUMENTS

All previously not printed.
 All previously printed.

* SFN Year: 2018

SFN From:

SFN To:

Submit

Select	Document Type	State File Number	State File Date	Local File Number	Local File Date	State Print	Local Print	Facility Name	Deceden
<input type="checkbox"/>	View Details AMENDED RECORD	0002152018	03/19/2018	000182	04/02/2018	PRINTED	PRINTED	GOLDEN GATE FUNERAL HOME CHERRY,	
<input type="checkbox"/>	View Details NEWLY REGISTRE	0002032018	03/14/2018	000501	04/23/2018	PRINTED	PRINTED	GOLDEN GATE FUNERAL HOME DOE, JAI	
<input type="checkbox"/>	View Details NEWLY REGISTRE	0002362018	04/10/2018	000503	04/23/2018	PRINTED	PRINTED	GOLDEN GATE FUNERAL HOME MORN, S	
<input type="checkbox"/>	View Details NOTICE OF DO NOT	0002222018	03/19/2018	000189	04/04/2018	Printed	Printed	ALL FAITHS FUNERAL HOME- GAYCE,	
<input type="checkbox"/>	View Details NEWLY REGISTRE	0002472018	04/00/2018	000509	04/30/2018	PRINTED	PRINTED	FINAL DESTINATION FUNERAL PERSON,	
<input type="checkbox"/>	View Details NEWLY REGISTRE	0002732018	06/12/2018	* 000501	06/12/2018	PRINTED	PRINTED	ALL FAITHS FUNERAL HOME- DAY, MO	

Page 1 of 1

Displaying Records 1 - 6 of 6

Print Clear

Figure 79: State Batch Print-Select checkboxes

- Click the **Print** button to print all selected records.
- The system will issue the following message:

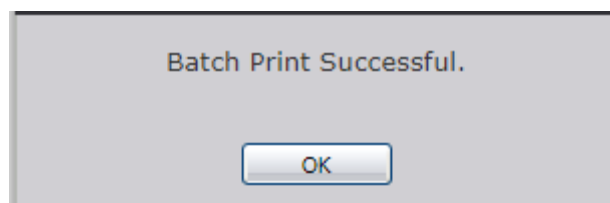


Figure 80: Batch Print Message

- Click **OK** to close the message and open all requested records in a PDF window for printing.
- Close the PDF window to return to the Local Print Queue Screen.

4 Local Burial Transit Permit Queue

These exercises provide an overview of different processes in Local Burial Transit Permit Queue.

To complete these exercises, the user will need:

- ✓ Permit requests that are ready for review
- ✓ The proper security process to access Local Burial Transit Permit Queue

4.1 Exercise 23— Access Local Burial Transit Permit Queue

Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue**.

4.2 Exercise 24— Search for Permits

1. Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue**.
2. Enter the date range for the date the permit was requested and the name of the funeral home (if desired):

The screenshot shows the 'Local Burial Transit Permit Queue' screen. At the top, there is a navigation bar with tabs for GLOBAL, BIRTH, DEATH, FETAL DEATH, and FEE. The DEATH tab is active. Below the navigation bar is the Texas Department of State Health Services logo and name. The main content area has a title 'Local Burial Transit Permit Queue' and a search form. The search form has two sections: 'Date Permit Requested' and 'Funeral Home Name'. The 'Date Permit Requested' section has 'From Date' and 'To Date' fields, both containing dates from 06/01/2018 to 06/20/2018. The 'Funeral Home Name' section has a text input field. At the bottom of the search form are 'Search' and 'Clear' buttons.

Figure 81: State Permit Print Queue Screen

3. Click the **Search** button to find all permits requested in the selected date range:

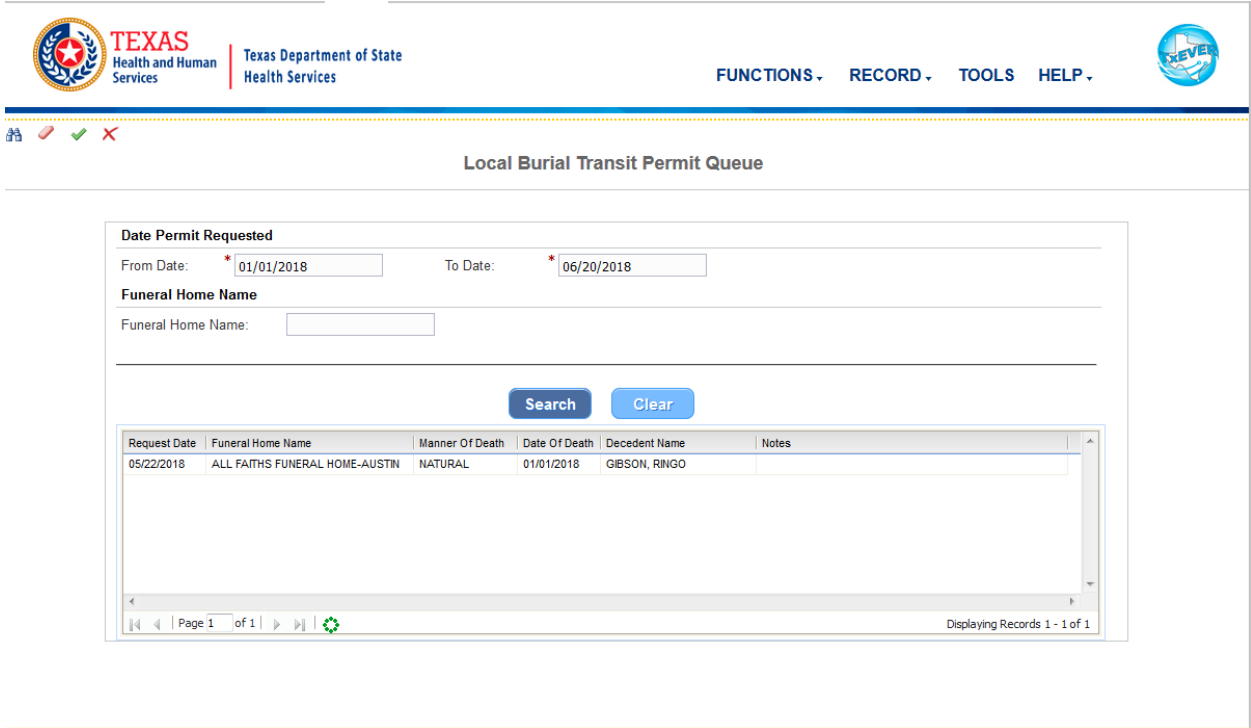


Figure 82: Local Burial Transit Permit Queue

4.3 Exercise 25— Accept Permit Request

1. Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue**.
2. Enter the date range for the date the permit was requested and the name of the funeral home (if desired):

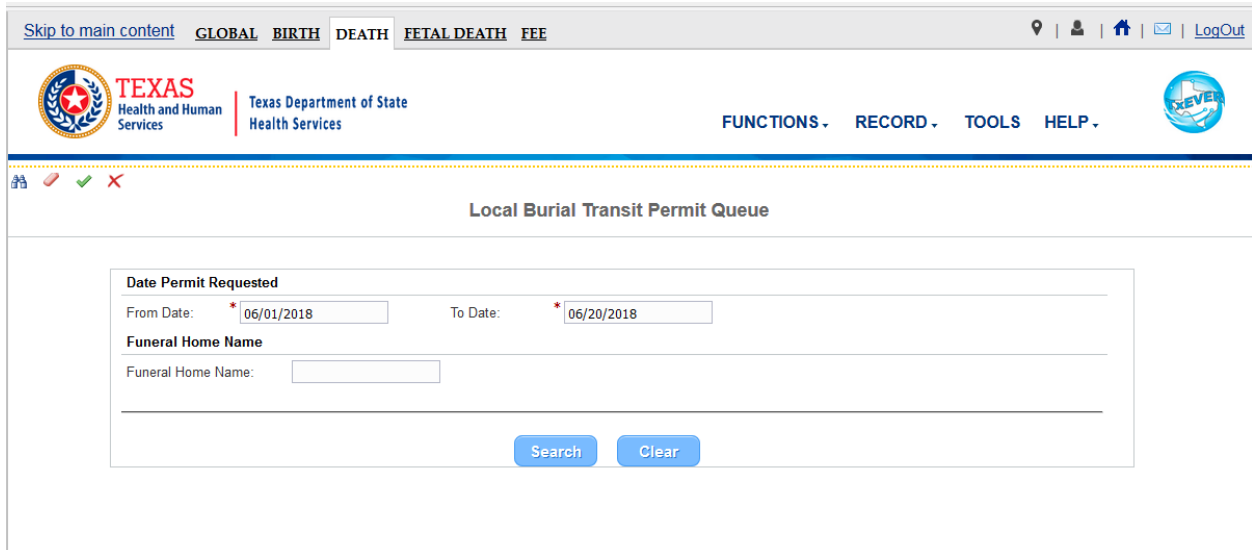


Figure 83: Local Permit Print Queue Screen

3. Click the **Search** button to find all permits requested in the selected date range:

TEXAS Health and Human Services | Texas Department of State Health Services

FUNCTIONS RECORD TOOLS HELP

Local Burial Transit Permit Queue

Date Permit Requested

From Date: * 01/01/2018 To Date: * 06/20/2018

Funeral Home Name

Funeral Home Name:

Search Clear

Request Date	Funeral Home Name	Manner Of Death	Date Of Death	Decedent Name	Notes
05/22/2018	ALL FAITHS FUNERAL HOME-AUSTIN	NATURAL	01/01/2018	GIBSON, RINGO	

Page 1 of 1 | Displaying Records 1 - 1 of 1

Figure 84: Local Burial Transit Permit Queue

4. Select the desired permit request by clicking on it to load the permit request information:

Local Burial Transit Permit Queue

Date Permit Requested
 From Date: * 01/01/2018 To Date: * 06/20/2018

Funeral Home Name
 Funeral Home Name:

Request Date	Funeral Home Name	Manner Of Death	Date Of Death	Decedent Name	Notes
05/22/2018	ALL FAITHS FUNERAL HOME-AUSTIN	NATURAL	01/01/2018	GIBSON, RINGO	

Page 1 of 1 | | Displaying Records 1 - 1 of 1

Decedent's Name	GIBSON, RINGO	Date Of Death:	01/01/2018
Sex:	MALE	Method Of Disposition:	CREMATION
Place Of Death:	SETON NORTHWEST HOSPITAL	Name Of Cemetery/Crematorium:	GATEWAY FUNERALS AND CREMATION-DALLAS
Funeral Director Name:	VENESSA BUTTS	Funeral Home Name:	ALL FAITHS FUNERAL HOME-AUSTIN
Manner Of Death:	NATURAL	Resubmit Notes:	
Request Date:	05/22/2018		

Figure 85: Local Burial Transit Permit Queue with Permit Request

5. Click the **Accept** button to accept the permit request. The application will issue the following message:

4.4 **Exercise 26— Reject Permit Request**

1. Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue**.
2. Enter the date range for the date the permit was requested and the name of the funeral home (if desired):

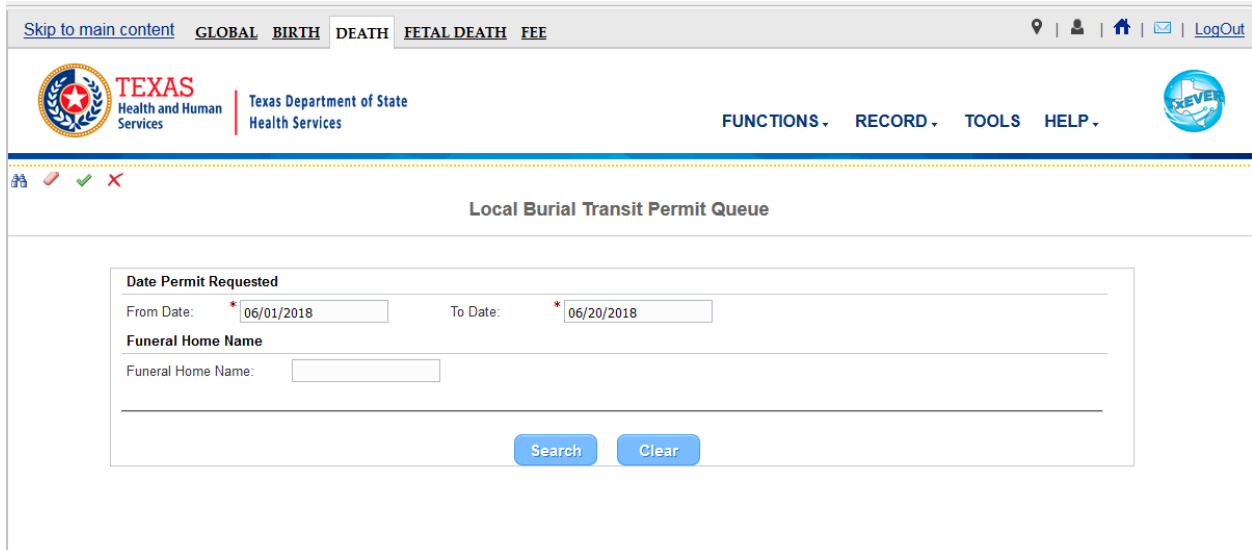


Figure 86: Local Permit Print Queue Screen

3. Click the **Search** button to find all permits requested in the selected date range:

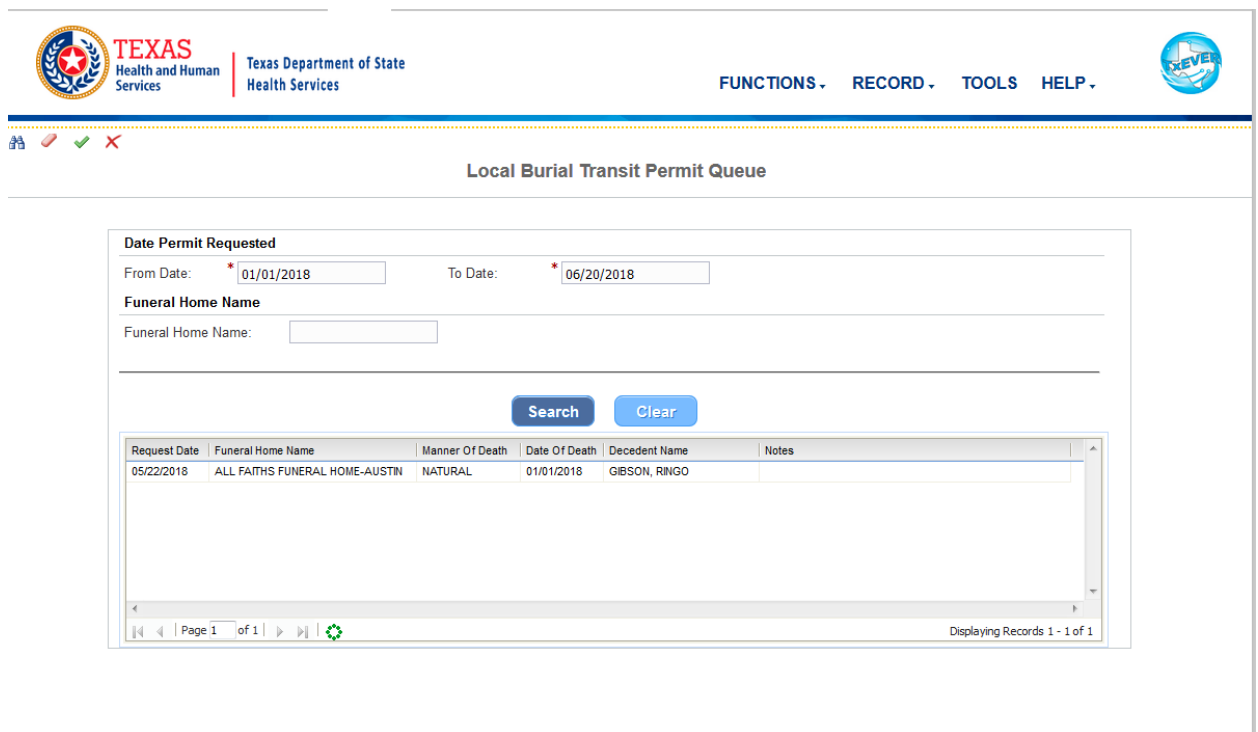


Figure 87: Local Burial Transit Permit Queue

4. Select the desired permit request by clicking on it to load the permit request information:

Local Burial Transit Permit Queue

Date Permit Requested
 From Date: * 01/01/2018 To Date: * 06/20/2018

Funeral Home Name
 Funeral Home Name:

Request Date	Funeral Home Name	Manner Of Death	Date Of Death	Decedent Name	Notes
05/22/2018	ALL FAITHS FUNERAL HOME-AUSTIN	NATURAL	01/01/2018	GIBSON, RINGO	

Page 1 of 1 |

Decedent's Name: GIBSON, RINGO
 Sex: MALE
 Place Of Death: SETON NORTHWEST HOSPITAL
 Funeral Director Name: VENESSA BUTTS
 Manner Of Death: NATURAL
 Request Date: 05/22/2018
 Date Of Death: 01/01/2018
 Method Of Disposition: CREMATION
 Name Of Cemetery/Crematorium: GATEWAY FUNERALS AND CREMATION-DALLAS
 Funeral Home Name: ALL FAITHS FUNERAL HOME-AUSTIN
 Resubmit Notes:

Figure 88: Local Burial Transit Permit Queue with Permit Request

5. Click the **Reject** button to reject the permit request. The application will issue the following message:

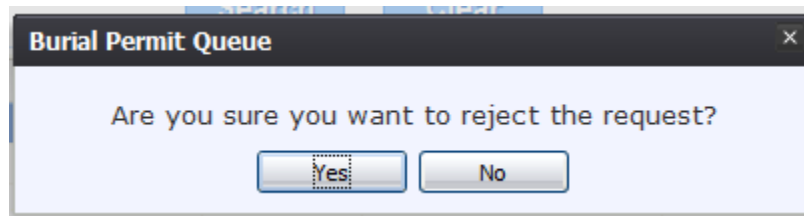


Figure 89: Record Rejection Confirmation Message

6. Click **Yes** to continue with the rejection of the burial transit permit request or click **No** to cancel the rejection of the request.
7. The Burial Permit Request Comment screen will appear:

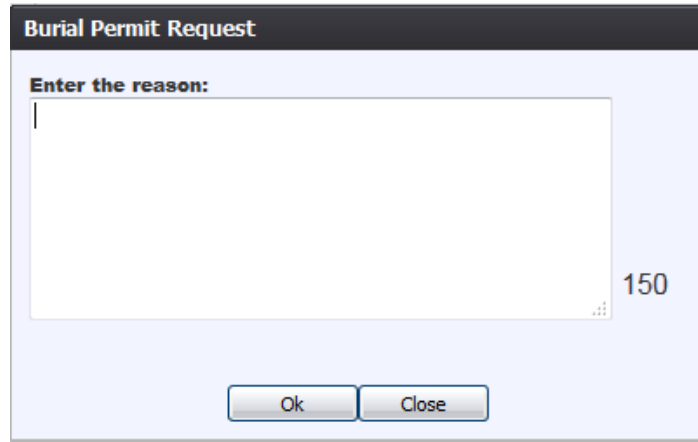


Figure 90: Burial Permit Request Comment Screen

8. Enter the reason for the rejection of the burial permit request and then click the **OK** button.
9. The application will issue the following message:

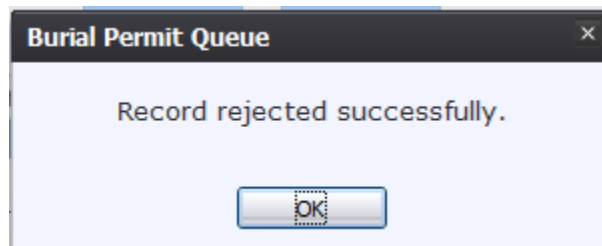


Figure 91: Record Rejected Successfully Message

5 Local Acceptance Queue

These exercises provide an overview of different processes in Local Acceptance Queue.


To complete these exercises, the user will need:

- ✓ Records that are ready for review
- ✓ The proper security process to access Local Acceptance Queue

5.1 Exercise 27—Access Local Acceptance Queue

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.

5.2 Exercise 28—Accept a Record

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.
2. Once the appropriate record is on the screen, users may either click **Record/Accept** or click the Accept icon  to accept the record.
3. Once **Accept** has been selected, the following message will appear:

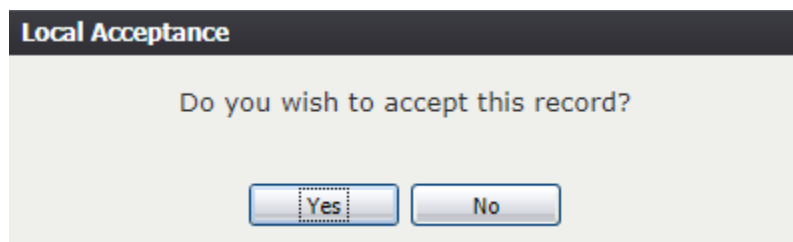


Figure 92: Record Acceptance Confirmation Message

4. Click **Yes** to accept the record. Click **No** to cancel.
5. Once the record has been accepted, the following message will appear:

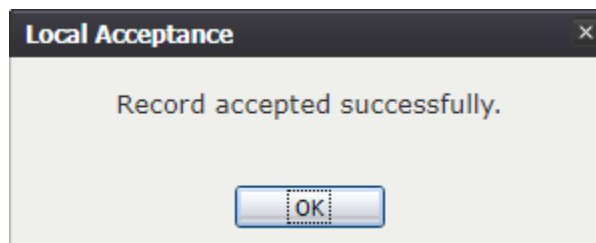



Figure 93: Record Accepted Successfully Message

5.3 Exercise 29—Reject a Record

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved**

Work Queue drop down menu.

2. Once the appropriate record is on the screen, users may either click **Record/Reject** or click the Reject icon  to reject the record.

Note: Only those records with Decedent's Home as Place of Death can be rejected.

3. Once **Reject** has been selected, the following message will appear:

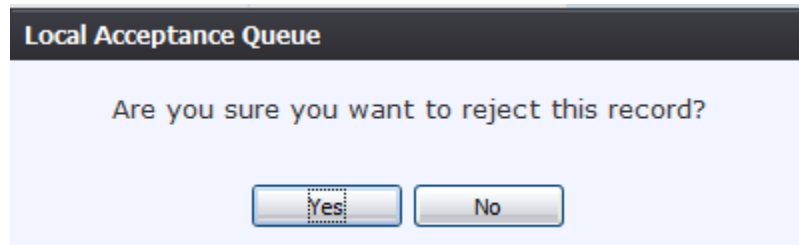


Figure 94: Record Rejection Confirmation Message

4. Click **Yes** to reject the record. Click **No** to cancel.
5. The Reject Record Comment screen will appear:

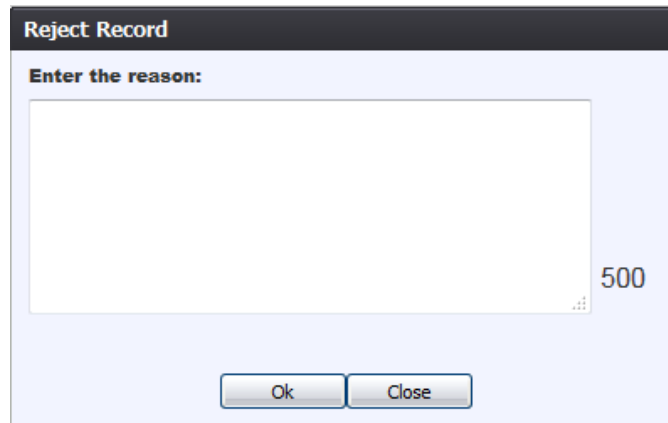


Figure 95: Reject Record Comment Screen

6. Enter the reason for the rejection of the record and then click the **OK** button.
7. The application will issue the following message:

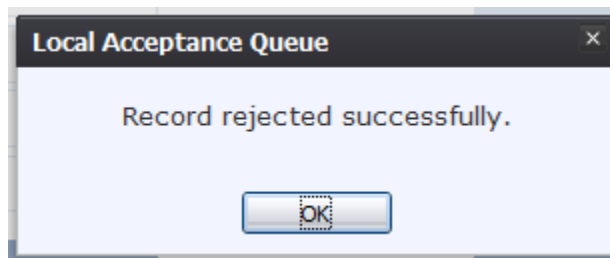




Figure 96: Record Rejected Successfully Message


5.4 Exercise 30—Re-Assign a Local

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.
2. Once the appropriate record is on the screen, users may either click **Record/Re-Assigned to Local** or click the Re-Assigned to Local icon  to open the Local Reassignment screen:



TEXAS
Health and Human
Services

Texas Department of State
Health Services

PROCESS . 

LOCAL RE-ASSIGNMENT

Field List / Stakeholders

- ✓ Demographic1
- ✓ Demographic2
- ✓ Demographic3
- ✓ Demographic4
- ✓ Demographic5
- ✓ Medical 1
- ✓ Medical 2
- ✓ Medical 3
- Comments

ACTIVITY:

Field Name:

Field Status:

Action:
Retrieving Record

GENERAL INFORMATION		
State File Number: 0000072018	Birth State File Number:	Record Type: IDENTIFIED
OUT OF STATE SFN		
Out Of State SFN:		
COURT INFORMATION		
Court Name:	Case Number:	Court Date:
DECEDENT'S LEGAL NAME		
Prefix: DR		First Name: V
Middle Name: V		Last Name: JOHN
Suffix:		
DATE OF DEATH		
Date of Death Type: ACTUAL DATE OF DEATH		Date of Death: 01/05/2018
TIME OF DEATH		
Time Of Death Type: ACTUAL TIME OF DEATH	Time Of Death: 10:22	Time Of Death Indicator: PM
DECEDENT'S SEX		DECEDENT'S DATE OF BIRTH
Sex: MALE		Date Of Birth: 01/05/2018
Maiden Last Name:		Age Units: HOURS
		Age: 1
DECEDENT'S BIRTHPLACE		DECEDENT'S SSN
State/Country: (Please click checkbox to filter countries only)		SSN:
<input type="checkbox"/> TEXAS		Social Security Missing Value Variable: UNKNOWN
County Of Birth: ABONA		SSN Verification Status:
City Of Birth: AAAA		



Figure 97: Main Local Re-Assignment Screen

Note: Only those records with Decedent's Home as Place of Death can have the local re-assigned.

4. Navigate to the Demographic 3 tab and click the wrench icon next to the Local field to initiate the editing of this field:

The screenshot displays the 'LOCAL RE-ASSIGNMENT' interface. On the left is a sidebar with a 'Field List / Stakeholders' section containing items like Demographic 1-5, Medical 1-3, and Comments, each with a green checkmark. Below this is an 'ACTIVITY:' section with 'Place Of Death Local: ABONA LOCAL OFFICE(HEAD BRANCH1)', 'Field Status: Resolved', and 'Action: Updating Record'. The main area is divided into two sections: '[OLD DATA]: PLACE OF DEATH' and '[NEW DATA]: PLACE OF DEATH'. Both sections have identical fields: 'Type of Place: DECEDENT'S HOME', 'Place of Death:', 'State/Country: (Please click checkbox to filter countries only)' with a checked 'TEXAS' checkbox, 'Local: ABONA LOCAL OFFICE(HEAD BRANCH1)', 'Zip: 12312', 'Other(Specify):', 'Street Address: ASD', 'County: ABONA', 'City/Town: ABONA CITY', and 'Zip Ext:'. In the 'NEW DATA' section, the 'Local' field is a dropdown menu currently showing 'ABONA LOCAL OFFICE(HEAD BRANCH1)'. At the bottom right is a 'Save' button.

Figure 98: Local Re-Assignment Screen

6. Edit the value in the Local field and click the **Save** button to return to the main Local Re-Assignment screen.
7. Select the **Process/Re-Assign to Local** menu item or click the Re-Assign to Local  icon. Select the **Process/Cancel** menu item or click the Cancel  icon to cancel the re-assignment.
8. The Local Re-assignment Comment Screen will appear:

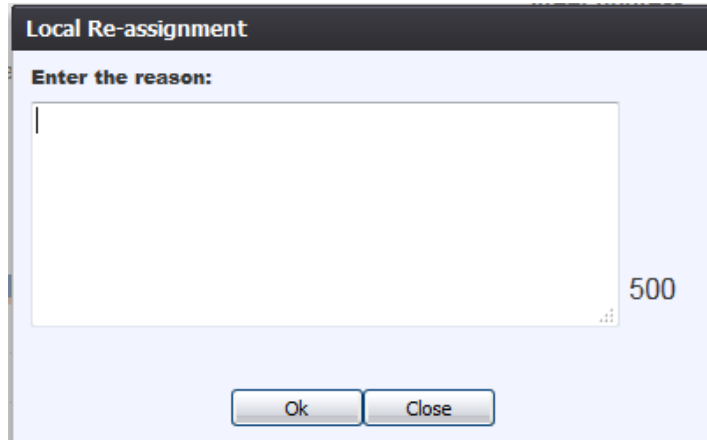


Figure 99: Local Re-Assignment Comment Screen

8. Enter the reason for the local-reassignment and then click the **OK** button.
9. The application will issue the following message:

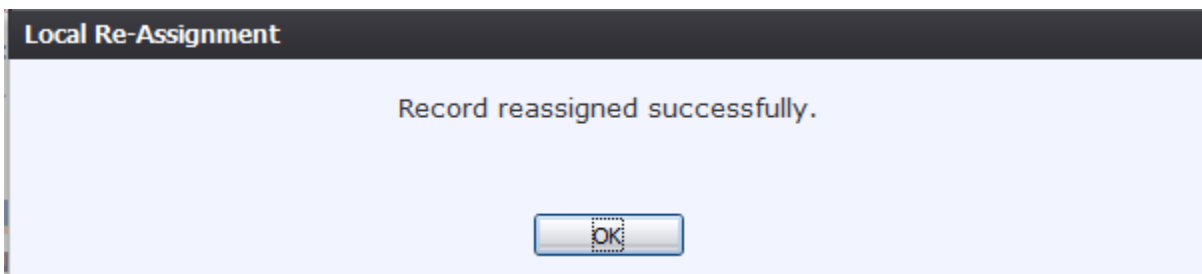



Figure 100: Record Reassigned Successfully Message

5.5 Exercise 31—View Corrections


1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.
2. Once the appropriate record is on the screen, users may either click **Record/Re-Assigned to Local** or click the Re-Assigned to Local icon  to open the Local Reassignment screen:



LOCAL RE-ASSIGNMENT

<p>Field List / StakeHolders</p> <ul style="list-style-type: none"> ✓ Demographic1 ✓ Demographic2 ✓ Demographic3 ✓ Demographic4 ✓ Demographic5 ✓ Medical 1 ✓ Medical 2 ✓ Medical 3 Comments <p>ACTIVITY:</p> <p>Field Name:</p> <p>Field Status:</p> <p>Action:</p> <p>Retrieving Record</p>	GENERAL INFORMATION		
	State File Number: 0000072018	Birth State File Number:	Record Type: IDENTIFIED
	OUT OF STATE SFN		
	Out Of State SFN:		
	COURT INFORMATION		
	Court Name:	Case Number:	Court Date:
	DECEDENT'S LEGAL NAME		
	Prefix: DR.	Middle Name: V	First Name: V
	Suffix:		Last Name: JOHN
	DATE OF DEATH		
	Date of Death Type: ACTUAL DATE OF DEATH	Date of Death: 01/05/2018	
	TIME OF DEATH		
Time Of Death Type: ACTUAL TIME OF DEATH	Time Of Death: 10:22	Time Of Death Indicator: PM	
DECEDENT'S SEX		DECEDENT'S DATE OF BIRTH	
Sex: MALE	Date Of Birth: 01/05/2018		
Maiden Last Name:	Age Units: HOURS		
	Age: 1		
DECEDENT'S BIRTHPLACE		DECEDENT'S SSN	
State/Country: (Please click checkbox to filter countries only) <input type="checkbox"/> TEXAS		SSN:	
County Of Birth: ABONA	Social Security Missing Value Variable: UNKNOWN		
City Of Birth: AAAA	SSN Verification Status:		

Figure 101: Main Local Re-Assignment Screen

3. Select the **Process/View Corrections** menu item or click the View Corrections  icon.
4. The Correction Viewer Screen will appear:

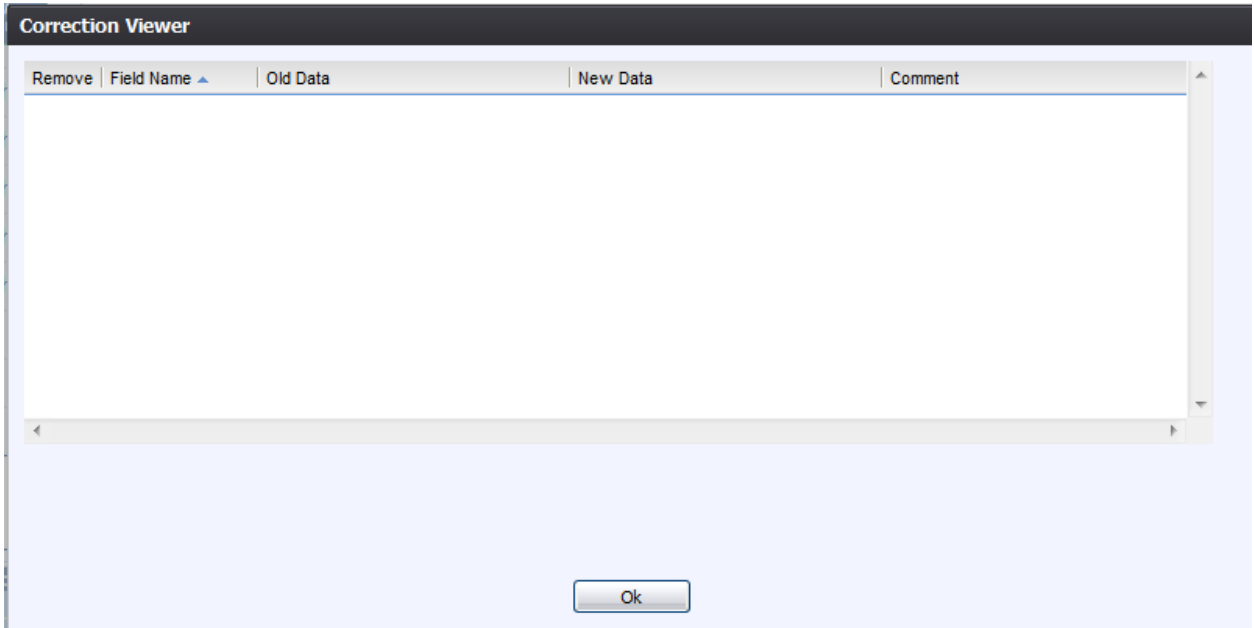


Figure 102: Correction Viewer Screen

6 Legal View Functions

Legal View Screen is the main Local interface that allows users to process or to initiate processing of existing registered records. All Legal View processes are record-specific, therefore a record has to be retrieved in the Legal View to initiate its processing.

These exercises provide an overview of different processes in Legal View.

To complete these exercises, the user will need:

- ✓ Access to Legal View as well as individual processes in Legal View
- ✓ Registered records

6.1 Exercise 32—Access Legal View

Access the **Legal View** screen by selecting the **Death/Function/Legal View** menu item from the **Death** main menu.

6.2 Exercise 33—Legal View Search Screen

The **Legal View Search** screen is similar to the **Search** screen available from **Death Registration**. Records available for retrieval from the **Legal View Search** screen will only be those records that have been registered and assigned a State File Number, records that have been voided, and records that have been abandoned.

To retrieve a record from the **Legal View Search** screen:

1. Go to **Death/Function/Legal View**.
2. On the **Legal View** screen, select the **Record/Search** menu item or the  icon. The **Legal View Search** screen will appear.

Figure 103: Legal View Search Screen

3. Enter all available information regarding the record.

- ✓ **Tip:** Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.
- ✓ **Tip:** Along with a name, including the year of death and gender and other information will reduce the number of matches that are returned and cause the search to be faster.
- ✓ **Tip:** Entering only a key field such as the EDR or Social Security Number will match a single record and result in a rapid response.
- ✓ **Tip:** Choosing 'Soundex' still requires the user to enter at least the newborn's year of birth. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound familiar as well.
- ✓ **Tip:** Voided and Abandoned records will not automatically show up in the search. To include voided and/or abandoned records, check the appropriate checkboxes at the top of the Death Search window.

4. Click **Search** to search the database.

Records that match the search criteria will load in the grid in the lower half of the screen.

The screenshot shows the 'Death Search' application window. It has two tabs: 'Wild-Card' (selected) and 'Soundex'. The interface is divided into several sections for data entry:

- DECEDENT'S ACTUAL INFORMATION:** Fields for EDR Number, Date Of Death (with a note: "ex. 00/00/2012 if month and day are not known, 02/00/2012 if day is not known."), Decedent's First Name, Middle Name, Last Name, Sex (dropdown menu), Maiden Last Name, Date Of Birth, and SSN.
- RECORD INFORMATION:** Field for State File Number.
- PARENT'S INFORMATION:** Fields for Father/Parent 2 First Name, Last Name, and Mother/Parent 1 First Name.
- PLACE OF DEATH INFORMATION:** Field for Place Of Death County (dropdown menu).

At the bottom, there is a table of search results with the following columns: EDR Number, Date Of Death, Decedent's First Name, Decedent's Middle Name, Decedent's Last Name, Decedent's Sex, Decedent Maiden Last Name, Decedent's Date Of Birth, and Decedent's SSN. The table contains six rows of data.

EDR Number	Date Of Death	Decedent's First Name	Decedent's Middle Name	Decedent's Last Name	Decedent's Sex	Decedent Maiden Last Name	Decedent's Date Of Birth	Decedent's SSN
000000000046	01/08/2018	DEAN-A	P	JONES-A	FEMALE	A	01/01/1980	155-55-555
000000000056	01/09/2018	FRANK	P	LOPAS	FEMALE	MPLN	01/01/1980	123-44-444
000000000190	01/23/2018	KENNYA	MIDDLE	GENNY	MALE		01/01/1990	242-42-423
000000000201	01/24/2018	JAMES-AR	P	LANCE-A	MALE		01/01/1980	636-36-363
000000000215	01/25/2018	S	S	MANRO	MALE		01/25/2018	
000000000232	01/25/2018	SMITH	P	LAMB	MALE		01/01/1980	111-11-111

At the bottom of the window, there are navigation controls: 'Page 1 of 1', a refresh icon, and a status bar indicating 'Displaying Records 1 - 13 of 13'. There are also buttons for 'Search', 'Select Record(s)', 'Clear', and 'Close'.

Figure 104: Legal View Search Screen with Results

5. Click on the appropriate record to select it. Select multiple records by holding down the Ctrl key and clicking on multiple records.
6. Click **Select Record(s)** to retrieve record(s) to the Work Queue.
7. Select a record from the work queue by clicking on it to retrieve it to the screen.
8. The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional processing.

6.3 Exercise 34—Printing from the Legal View Screen

The **Print** function allows users with the proper security process to print certified copies of death records from the application.

1. Select the **Death/Function/Legal View** menu item once successfully logged into the proper location.
2. Select the **Record/Search** menu item to retrieve records
3. Retrieve the record for printing from the work queue.
4. When the record is loaded on screen, select the **Record/Print/Certificate of Death (Certified)/Certified Death Certificate**

5. The certified copy of the death certificate will load in PDF format in a new browser window.
6. Print the document from the browser window and then close the browser window to return to the application.

The state user can print the following types of forms and certificates depending on what type of record is retrieved on the **Legal View** screen:

- View/Print Net Change History
- Un-Certified Death Certificate
- Un-Certified Death Certificate – Small
- Certified Death Certificate
- Certified Death Certificate – Small
- Delayed Death Certificate

6.4 Exercise 36—View/Print Net-Change History

Following the registration of a record, all subsequent changes made to the record will be stored in a net-change history that can be viewed/printed at any time from the **Legal View** screen.

To view/print a record’s net-change history:

1. Go to **Function/Legal View** menu item from the **Death** main menu to access **Legal View**.
2. Retrieve the record on which to view/print the net-change history through the **Legal View Search** screen.
3. When the record is on-screen, select the **Record/View/Print Net-Change History** menu option.
4. The following screen will appear:

Event #	Correction Type	Field Name	Original Value	New Value	Comment	User ID	Date
1948	Statistical Correctio	Decedent's Origin - False	False	TRUE		ADMIN	2/21/2018 6:35:4
1948	Statistical Correctio	Decedent's Origin - True	True	FALSE		ADMIN	2/21/2018 6:35:4
1948	Statistical Correctio	Ethnicity MVR	REFUSED			ADMIN	2/21/2018 6:35:4
1946	Statistical Correctio	Any Injury Informati		YES		ADMIN	2/21/2018 4:41:2
1946	Statistical Correctio	Date of Injury		2018/01/01		ADMIN	2/21/2018 4:41:2

Document	Type	Date	Issued By	User ID	Date

Figure 105: Net Change History Screen

5. Click Print to print the net-change history of the selected record.

7 Corrections and Amendments

These exercises provide an overview of different processes involved in Corrections and Amendments.

To complete these exercises, the user will need:

- ✓ Access to Legal View
- ✓ The proper security processes to make a correction/amendment and review a correction/amendment
- ✓ Registered records

7.1 Corrections

7.1.1 Exercise 37—Access Corrections

To access **Corrections**:

1. Open the **Legal View** screen by selecting the **Function/Legal View** menu option from the **Death** main menu.
2. Retrieve a record to the **Legal View Search** screen to bring it into the **Unresolved Work Queue**.
3. Once the record is on the screen, select the **Record/Corrections** menu item and then select one of the following sub-menu items:
 - a. Authorization Correction
 - b. Statistical Correction
 - c. Typewriter Correction

7.1.2 Exercise 38—Make a Correction

1. Open the **Legal View** screen by selecting the **Function/Legal View** menu option from the **Death** main menu.
2. Retrieve a record to the **Legal View Search** screen to bring it into the **Unresolved Work Queue**.
3. Once the record is on the screen, select the **Record/Corrections** menu item and then select one of the following sub-menu items:
 - a. Authorization Correction
 - b. Statistical Correction
 - c. Typewriter Correction
4. The record will open in the specific correction screen:



STATISTICAL CORRECTION

EDR: 000000000197 Registrant Name: ? Date of Death: 2018/05/07 SFN: 0002562018

Fields List	GENERAL INFORMATION		
✓ Demographic1	State File Number: 0002562018	Birth State File Number:	Record Type: UNIDENTIFIED
✓ Demographic2	OUT OF STATE SFN		
✓ Demographic3	Out Of State SFN:		
✓ Demographic4	COURT INFORMATION		
✓ Demographic5	Court Name:	Case Number:	Court Date:
✓ Medical 1	DECEDENT'S LEGAL NAME		
✓ Medical 2	Prefix:	First Name:	
✓ Medical 3	Middle Name:	Last Name: ?	
Comments	Suffix:		
ACTIVITY:	DATE OF DEATH		
Field Name:	Date of Death Type: FOUND ON	Date of Death: 05/07/2018	
Field Status:	TIME OF DEATH		
Action: Retrieving Record	Time Of Death Type: FOUND ON	Time Of Death: 08:05	Time Of Death Indicator: AM
	DECEDENT'S SEX		DECEDENT'S DATE OF BIRTH
	Sex: MALE	Date Of Birth:	?
	Maiden Last Name:	Age Units:	UNKNOWN
		Age:	
	DECEDENT'S BIRTHPLACE		DECEDENT'S SSN
	State/Country: (Please click checkbox to filter countries only)	<input checked="" type="checkbox"/> UNKNOWN	SSN:
	County Of Birth:	Social Security Missing Value Variable:	UNKNOWN

Figure 106: Main Correction Screen

- After coming to a field that needs to be corrected, click the wrench icon located next to the appropriate field.





STATISTICAL CORRECTION

EDR: 000000000197 Registrant Name: ? Date of Death: 2018/05/07 SFI: 0002562018

[OLD DATA]: DECEDENT OF HISPANIC ORIGIN?	[NEW DATA]: DECEDENT OF HISPANIC ORIGIN?
<input type="checkbox"/> No, Not Spanish/Hispanic/Latino	<input type="checkbox"/> No, Not Spanish/Hispanic/Latino
<input type="checkbox"/> Yes, Mexican, Mexican American, Chicano	<input type="checkbox"/> Yes, Mexican, Mexican American, Chicano
<input type="checkbox"/> Yes, Puerto Rican	<input type="checkbox"/> Yes, Puerto Rican
<input type="checkbox"/> Yes, Cuban	<input type="checkbox"/> Yes, Cuban
<input type="checkbox"/> Yes, Other Spanish/Hispanic/Latino (Specify)	<input type="checkbox"/> Yes, Other Spanish/Hispanic/Latino (Specify)
<input checked="" type="checkbox"/> Unknown	<input checked="" type="checkbox"/> Unknown
If Decedent's Ethnicity is Unknown NOT OBTAINABLE	If Decedent's Ethnicity is Unknown NOT OBTAINABLE
Comments	
Supplemental Documents	
Document Type :	<input type="text"/>
Who Issued :	<input type="text"/>
IssueDate :	<input type="text"/>

GEN PRINT PLUGIN: 2.0.6 CONNECTION: ACTIVE

Figure 107: Correction Screen

- The correction screen displaying the old data and the new data will open. Enter the corrected value into the field.
- Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon  or **Upload Document** icon .

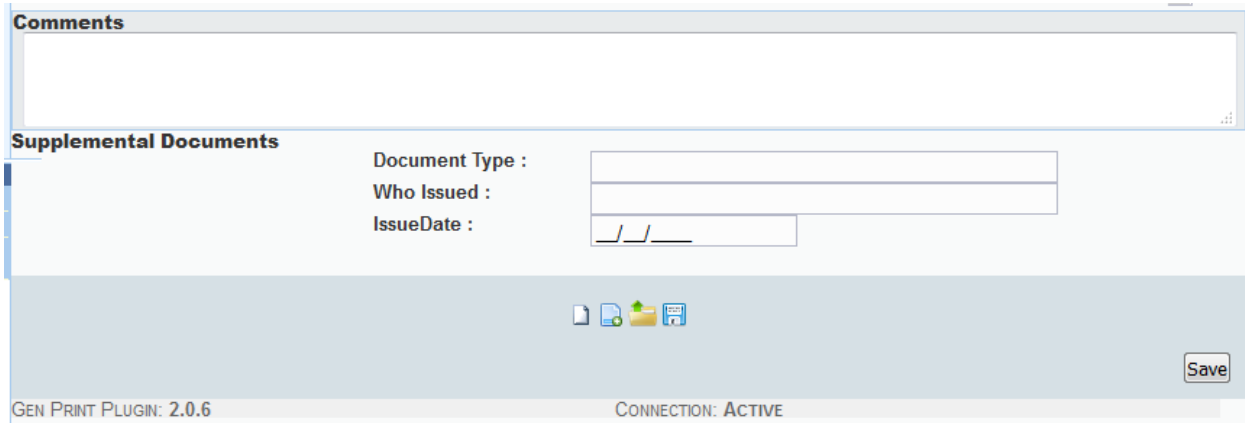




Figure 108: Supplemental Documents Section

Note: If the State user does not intend to scan in any supporting documentation, they can click the **Save Document without Scan** icon  after entering a corrected value in the **New Data** section.

7.1.2.1 Scan Supporting Documentation

To scan supporting documentation:

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon .

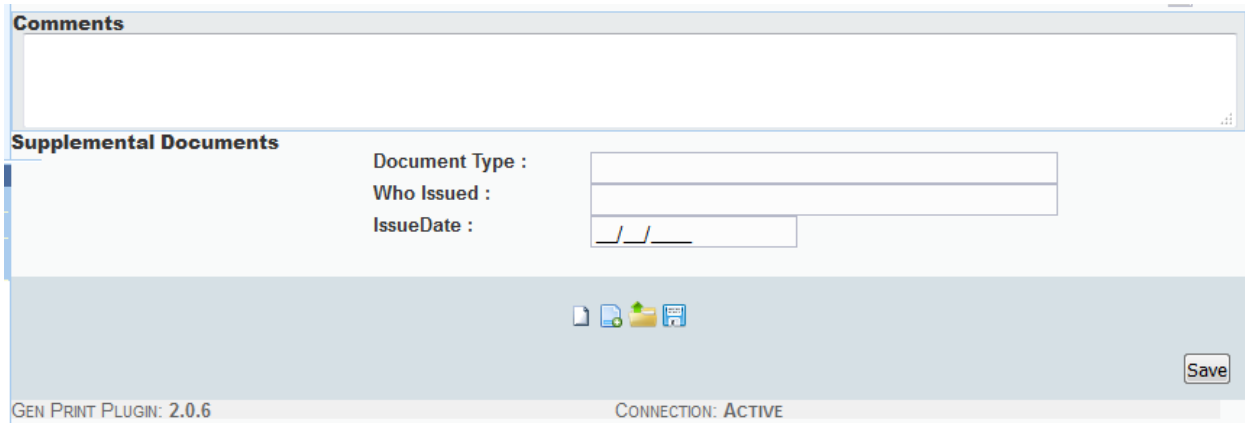



Figure 109: Supplemental Documents Information Screen

If the user does not intend to scan in any supporting documentation, they can click the **Save Document without Scan** icon  after entering a new value in the **New Data** section.


2. The **Scan Documents** window will appear.

The screenshot shows a software window titled "Scan Documents". On the left side, there are labels for various fields: "Document Type:", "Who Issued:", "Date Issued:", "Image Description:", "List of Scanners:", and "Scan Type:". Each label is followed by a text input field. The "Document Type" field contains the text "DRIVER\$S LICENSE", "Who Issued" contains "STATE", and "Date Issued" contains "01/01/2018". The other fields are empty. At the bottom right of the window, there are three buttons: "Scan Document", "Save Document", and "Close".

Figure 110: Scan Documents Window

3. Enter a description of the document being scanned, choose a scanner from the List of Scanners drop-down, and select a Scan Type.
4. Click **Scan Document** to scan the document.

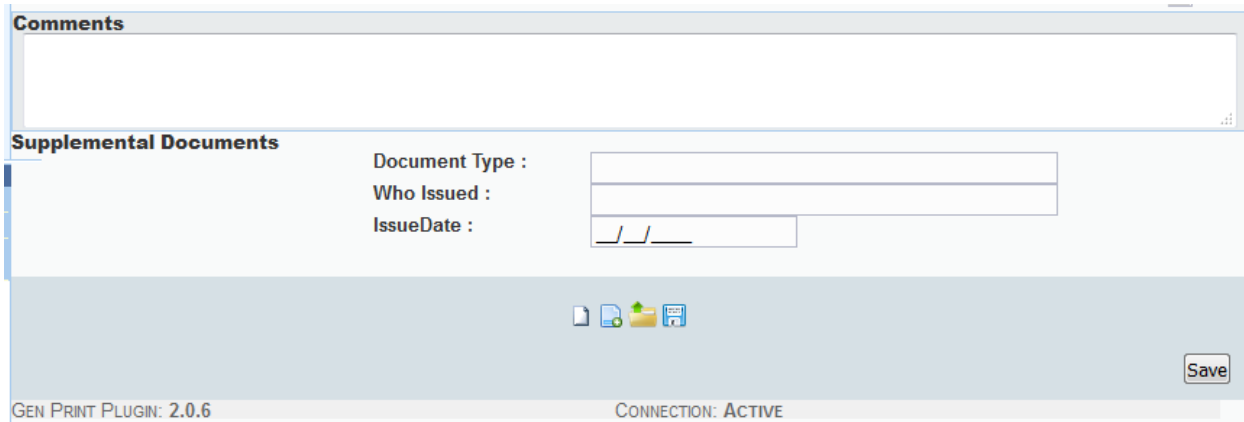
After the scanning process has been completed, a preview of the scanned document will load in the scanned image area of the window.

5. Click the **Save Document** button to save the document.
6. Click the **Close** button to close the Scan Documents window and return to the QA Audit Review Corrections Screen
7. The user can choose to scan more supporting documentation by clicking the **Scan Another Document** icon  and completing the scanning process again.
8. Save the changes by clicking the **Save** button in the **New Data** section of the **Corrections** screen.

7.1.2.2 Upload Supporting Documentation

To upload supporting documentation:

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Upload Document** icon.



The screenshot shows a software interface with a 'Comments' text area at the top. Below it is the 'Supplemental Documents' section, which contains three input fields: 'Document Type', 'Who Issued', and 'IssueDate'. The 'IssueDate' field has a date picker icon. At the bottom of this section are icons for file operations and a 'Save' button. The footer of the interface displays 'GEN PRINT PLUGIN: 2.0.6' and 'CONNECTION: ACTIVE'.

Figure 111: Supplemental Documents Section

2. The **File Upload** screen will appear.

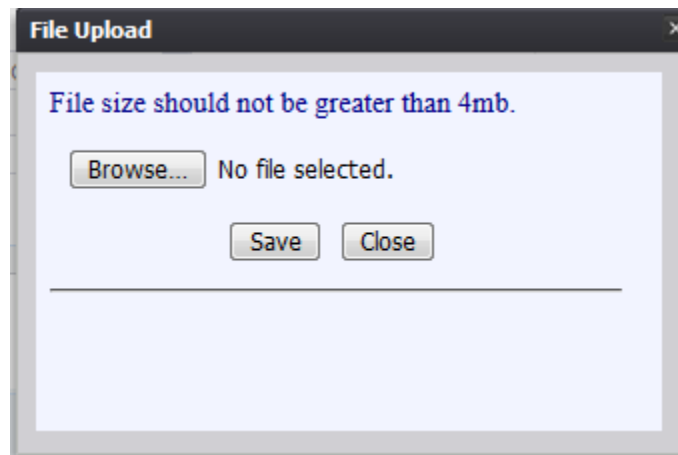


Figure 112: File Upload Screen

3. Click the **Browse** button to open the **File Upload** screen.
4. Locate the desired .tif or .tiff file and click the **Open** button.
5. The **File Upload** screen will appear as seen below:

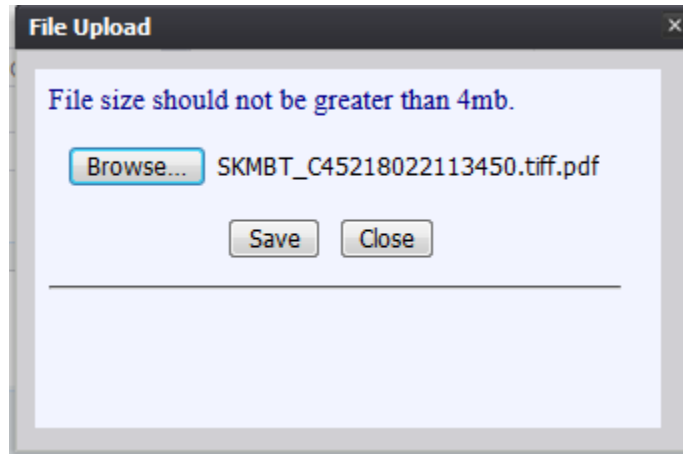


Figure 113: File Upload Screen with File Selected

6. Click the **Save** button.
7. A message will appear letting the user know the document information has been saved successfully.
8. Click **OK** to close the message.
9. Save the changes by clicking the **Save** button in the **New Data** section of the **Corrections** screen.

7.1.3 Exercise 39—Submit a Correction

1. Click the **Accept** icon  or select the **Process/Accept** menu item. The following message will appear:

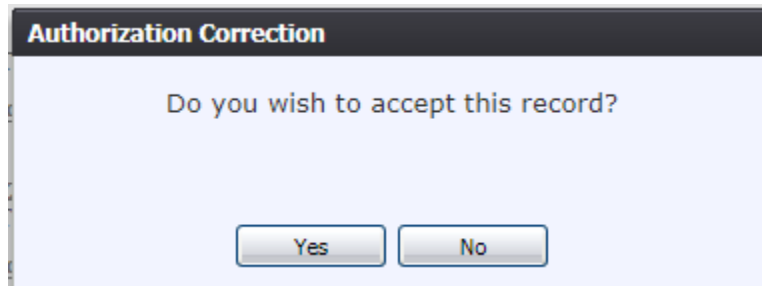


Figure 114: Record Submission Confirmation Message

- a. Click **Yes** to continue with submission of the record.
 - b. Click **No** to cancel submission of the record.
2. The following message will appear:

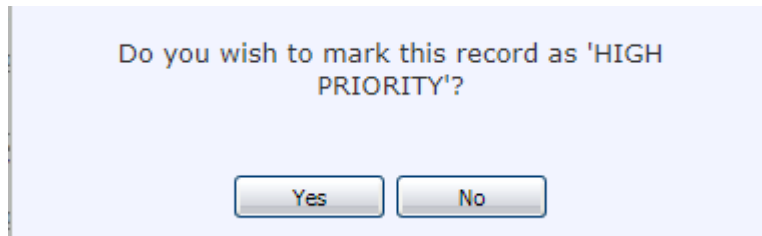



Figure 115: High Priority Submission Confirmation Message

- a. Click **Yes** to submit the record as high priority.
 - b. Click **No** to decline submitting the record as high priority.
3. A message will appear that the record has been saved successfully.

Note: In the case of an authorization correction, the system will issue a message that a supervisory PIN will be required and the record will be routed to the Supervisor Authorization screen.

7.1.4 Exercise 40—Cancel a Correction

A correction may be cancelled at any time up until it is accepted or submitted in the **Corrections Review** process.

To cancel corrections, click the **Exit** icon  or select the **Process/Exit** menu item to return to the **Legal View** screen.

7.2 Amendments

7.2.1 Exercise 41—Access Amendments

To access **Amendments**:

1. Select the **Function/Legal View** menu option from the Death Application main menu to go to **Legal View**.
2. Retrieve a record on which to make an amendment using the **Legal View Search** screen to bring it into the Unresolved Work Queue.
3. Once the record is on the screen, select the **Record/Amendments** menu item and then select one of the following sub-menu items:
 - a. Legal Amendment
 - b. Administrative Amendment

7.2.2 Exercise 42—Make an Amendment

1. Select the **Function/Legal View** menu option from the Death Application main menu to go to **Legal View**.
2. Retrieve a record on which to make an amendment using the **Legal View Search** screen to bring it into the Unresolved Work Queue.
3. Once the record is on the screen, select the **Record/Amendments** menu item and then select

one of the following sub-menu items:

a. Legal Amendment

4. The record will open on the amendment screen, as shown below:

TEXAS
Health and Human Services | Texas Department of State Health Services

PROCESS -

LEGAL AMENDMENT

EDR: 000000001280 Registrant Name: JULIA DE MOOREY Date of Death: 2018/05/02 SFN: 0004402018

GENERAL INFORMATION

State File Number: 0004402018 Birth State File Number: Record Type: IDENTIFIED

OUT OF STATE SFN

Out Of State SFN:

COURT INFORMATION

Court Name: Case Number: Court Date:

DECEDENT'S LEGAL NAME

Prefix: DR. First Name: JULIA
Middle Name: Last Name: MOOREY
Suffix: JR.

DATE OF DEATH

Date of Death Type: FOUND ON Date of Death: 05/02/2018

TIME OF DEATH

Time Of Death Type: FOUND ON Time Of Death: 10:25 Time Of Death Indicator: AM

Figure 116: Main Amendment Screen (Legal Amendment)

4. After coming to a field that needs to be amended, click the **Edit** icon located next to the appropriate field.

The following screen will appear:

LEGAL AMENDMENT

EDR: 000000001280 Registrant Name: JULIA DE MOOREY Date of Death: 2018/05/02 SFN: 0004402018

Fields List

✕

✓ Demographic 1

✓ Demographic 2

✓ Demographic 3

✓ Demographic 4

✓ Demographic 5

✓ Medical 1

✓ Medical 2

✓ Medical 3

Comments

Активны:

Decedent's Prefix: DR.

Field Status: Resolved

Action: Updating Record

[OLD DATA]: DECEDENT'S LEGAL NAME

Prefix: DR.	First Name: JULIA
Middle Name: DE	Last Name: MOOREY
Suffix: JR.	

[NEW DATA]: DECEDENT'S LEGAL NAME

Prefix: <input type="text" value="DR."/>	First Name: <input type="text" value="JULIA"/>
Middle Name: <input type="text" value="DE"/>	Last Name: <input type="text" value="MOOREY"/>
Suffix: <input type="text" value="JR."/>	

Comments

Supplemental Documents

Document Type :	<input type="text"/>
Who Issued :	<input type="text"/>
IssueDate :	<input type="text" value="__/__/"/>

Figure 117: Amendment Screen

5. Enter the amended values into the fields provided for entry of the new value. Old and New Data will both be displayed on the screen.
6. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon or **Upload Document** icon .

Comments


Supplemental Documents

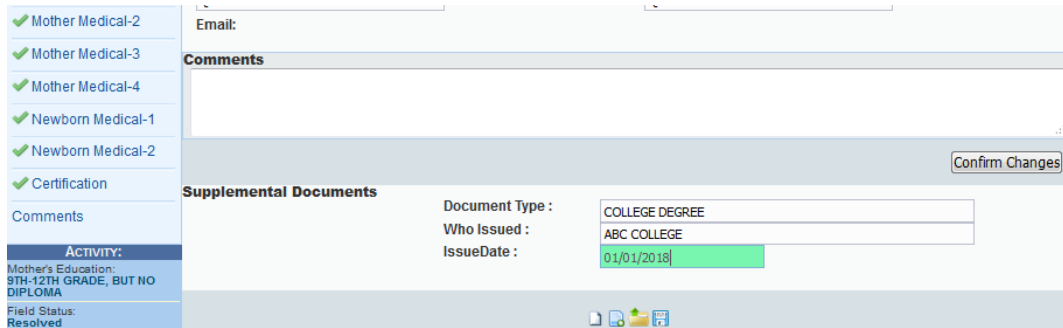
Document Type :	<input type="text"/>
Who Issued :	<input type="text"/>
IssueDate :	<input type="text" value="__/__/"/>

Figure 118: Supplemental Documents Section

Note: If the State user does not intend to scan in any supporting documentation, they can click the **Save Document without Scan** icon after entering a corrected value in the **New Data** section.

7.2.2.1 Scan Supporting Documentation

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon .



✓ Mother Medical-2	Email:
✓ Mother Medical-3	Comments
✓ Mother Medical-4	
✓ Newborn Medical-1	
✓ Newborn Medical-2	
✓ Certification	
Comments	
ACTIVITY:	
Mother's Education: 9TH-12TH GRADE, BUT NO DIPLOMA	
Field Status: Resolved	

Supplemental Documents


Document Type : COLLEGE DEGREE

Who Issued : ABC COLLEGE

IssueDate : 01/01/2018

Confirm Changes

Figure 119: Supplemental Documents Section with Details Entered

If the user does not intend to scan in any supporting documentation, they can click the **Save Document without Scan** icon  after entering a new value in the **New Data** section.

2. The **Scan Documents** window will appear.

Scan Documents

Document Type: DRIVER'S LICENSE

Who Issued: STATE

Date Issued: 01/01/2018

Image Description:


List of Scanners:

Scan Type:

Scan Document Save Document Close

Figure 120: Scan Documents Window

3. Enter a description of the document being scanned, choose a scanner from the List of Scanners drop-down, and select a Scan Type.
4. Click **Scan Document** to scan the document.

After the scanning process has been completed, a preview of the scanned document will load in the scanned image area of the window.
5. Click the **Save Document** button to save the document.
6. Click the **Close** button to close the Scan Documents window and return to the QA Audit Review Corrections Screen
7. The user can choose to scan more supporting documentation by clicking the **Scan Another Document** icon  and completing the scanning process again.
8. Save the changes by clicking the **Save** button in the **New Data** section of the **Corrections** screen.

7.2.2.2 Upload Supporting Documentation

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Upload Document** icon.

The screenshot shows a software interface with a left-hand navigation pane. The main content area is divided into several sections. At the top, there is an 'Email' field. Below it is a 'Comments' section with a large text area. The 'Supplemental Documents' section is at the bottom and contains three input fields: 'Document Type' with the value 'COLLEGE DEGREE', 'Who Issued' with the value 'ABC COLLEGE', and 'IssueDate' with the value '01/01/2018'. A 'Confirm Changes' button is located to the right of these fields. The left sidebar contains a list of items with green checkmarks, including 'Mother Medical-2', 'Mother Medical-3', 'Mother Medical-4', 'Newborn Medical-1', 'Newborn Medical-2', and 'Certification'. Below this list are sections for 'Comments' and 'ACTIVITY: Mother's Education: 9TH-12TH GRADE, BUT NO DIPLOMA'. At the bottom of the sidebar, it says 'Field Status: Resolved'.

Figure 121: Supplemental Documents Section with Details Entered

2. The **File Upload** screen will appear.

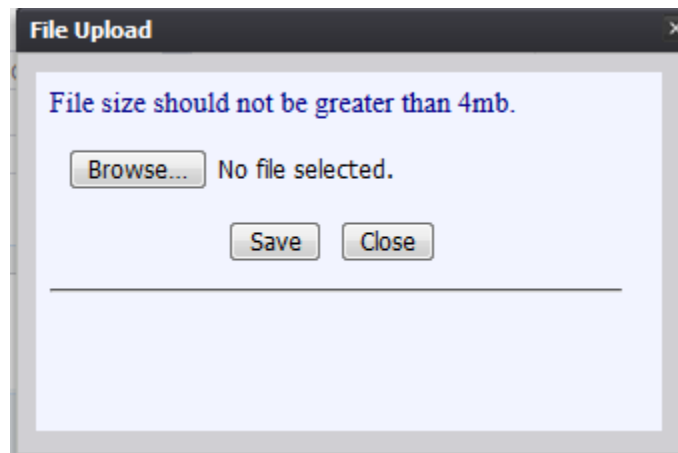


Figure 122: File Upload Screen

3. Click the **Browse** button to open the **File Upload** screen.
4. Locate the desired .tif or .tiff file and click the **Open** button.
5. The **File Upload** screen will appear as seen below:

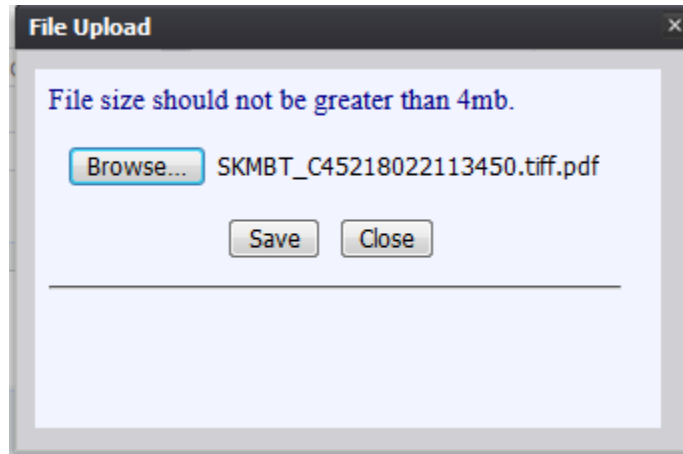


Figure 123: File Upload Screen with File Selected

6. Click the **Save** button.
7. A message will appear letting the user know the document information has been saved successfully.
8. Click **OK** to close the message.
9. Save the changes by clicking the Save button in the New Data section of the Corrections screen.

7.2.3 Exercise 43—Submit an Amendment

1. Click the **Accept** icon  or select the **Process/Accept** menu item. The following message will appear:

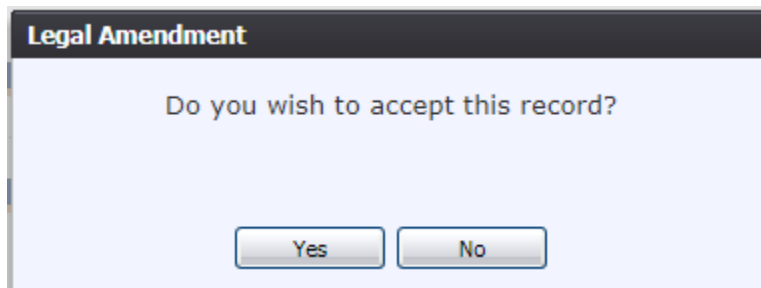


Figure 124: Record Submission Confirmation Message

- a. Click **Yes** to continue with submission of the record.
 - b. Click **No** to cancel submission of the record.
2. The following message will appear:

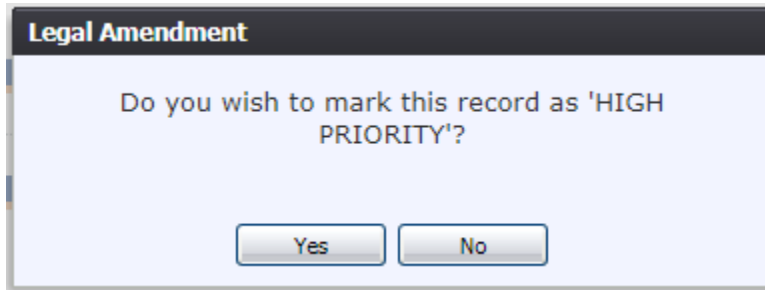


Figure 125: High Priority Submission Confirmation Message

- a. Click **Yes** to submit the record as high priority.
- b. Click **No** to decline submitting the record as high priority.
3. A message will appear that the record has been submitted successfully.

Note: In the case of an authorization correction, the system will issue a message that a supervisory PIN will be required and the record will be routed to the Supervisor Authorization screen.

7.2.4 Exercise 44—Cancel an Amendment

An amendment may be cancelled at any time up until it is accepted or submitted to the **QA Legal Amendment Review** process.

To cancel an amendment and return to the **Legal View** screen, click the **Exit** icon  or select the **Process/Exit** menu item. Any amendments made to the record but not saved will be cancelled.

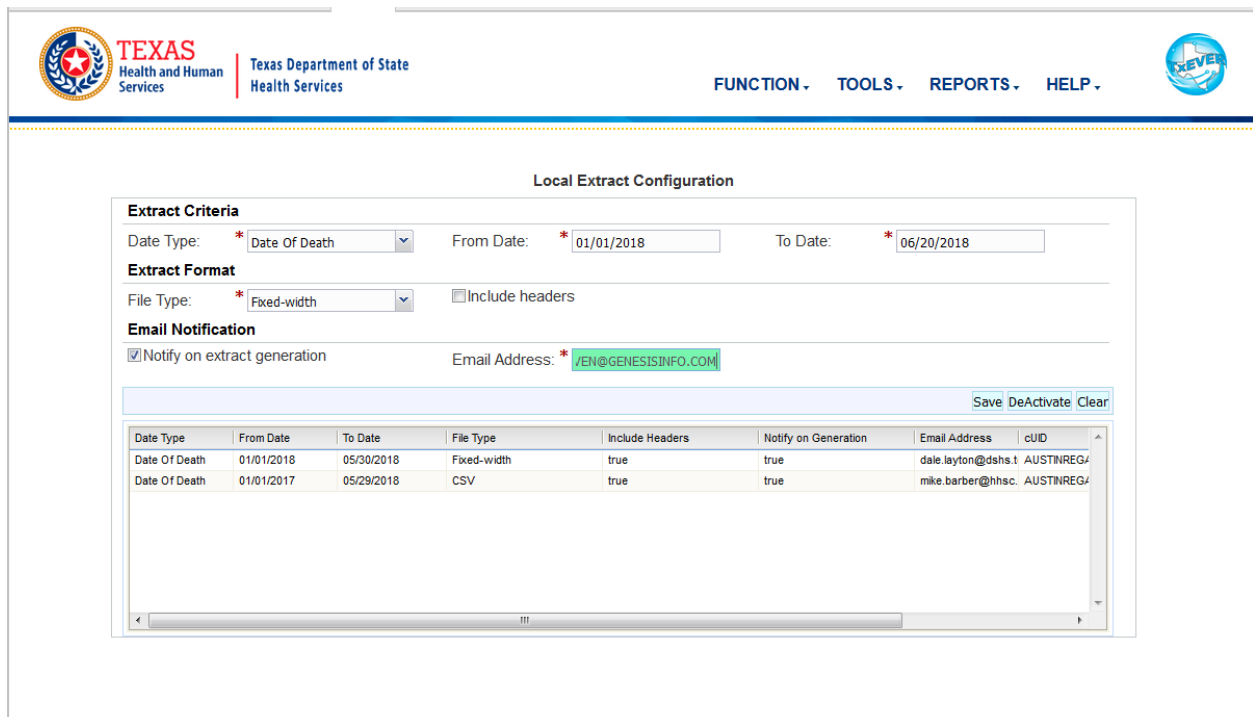
8 Extracts

Note: Other extracts available for death records are all produced through a scheduled task that is the responsibility of a Database Administrator (DBA). The extracts described below are the extracts available on demand from the TxEVER Death Application.

8.1 Exercise 45—Local Batch File

To schedule the Local Batch File:

1. From the Death Menu, select the **Tools/Extracts/Local Batch File** sub-menu. The extract criteria screen will open.
2. Enter/select all criteria on the screen:



The screenshot displays the 'Local Extract Configuration' window. It includes the following sections:

- Extract Criteria:** Date Type: * Date Of Death (dropdown), From Date: * 01/01/2018, To Date: * 06/20/2018.
- Extract Format:** File Type: * Fixed-width (dropdown), Include headers.
- Email Notification:** Notify on extract generation, Email Address: * /EN@GENESISINFO.COM.

Buttons: Save, DeActivate, Clear.

Date Type	From Date	To Date	File Type	Include Headers	Notify on Generation	Email Address	CUID
Date Of Death	01/01/2018	05/30/2018	Fixed-width	true	true	dale.layton@dshs.t	AUSTINREGA
Date Of Death	01/01/2017	05/29/2018	CSV	true	true	mike.barber@hhsc.	AUSTINREGA

Figure 126: Local Extract Configuration Screen

3. Click the **Save** button.
4. The application will issue a message that the configuration has been saved successfully.

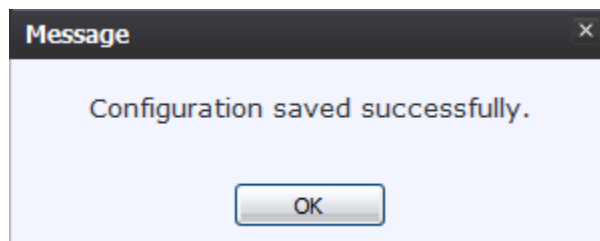


Figure 127: Configuration Saved Successfully Message

5. Click **OK** to close the message.

Note: Extract files will need to be retrieved and downloaded using the Extract File Downloader screen.

8.2 Exercise 46—Interstate Jurisdiction Exchange (IJE) Extract

The **IJE Extract** is a monthly scheduled and on-demand process that provides records to other participating states for decedents that died in Texas but are not residents in Texas. The scheduled process will create files and save the files to pre-defined folders for each state. The on-demand process allows the state of Texas to select files according to date range, event type, and state. The extracted file is in the standardized NAPHSIS Interstate Jurisdiction Exchange STEVE file format. There are two IJE Extracts:

- IJE STEVE – The decedent’s state of residence is not Texas.
- IJE ROSTER – The decedent’s state of birth is not Texas.

To generate the Interstate Jurisdiction Exchange Extract on demand:

1. From the Death Menu, select the **Tools/Extracts/Interstate Jurisdiction (IJE) Extract** sub-menu and select **IJE STEVE** or **IJE ROSTER**. The extract criteria screen will open.
2. Enter/select all criteria on the screen:

Interstate Jurisdiction Exchange Extract - STEVE

Extract Criteria

All previously not sent

Range based on Date of Death (Previously Extracted)

Date Of Death (From): Date Of Death (To):

Year of Death and Range based on State File Number (Previously Extracted)

Year Of Death: State File Number(From): State File Number (To):

Figure 128: Interstate Jurisdiction Exchange Extract – STEVE

Figure 129: Interstate Jurisdiction Exchange Extract - ROSTER

3. Click the **Generate** button.
4. The application will issue a message that the extract has generated successfully.

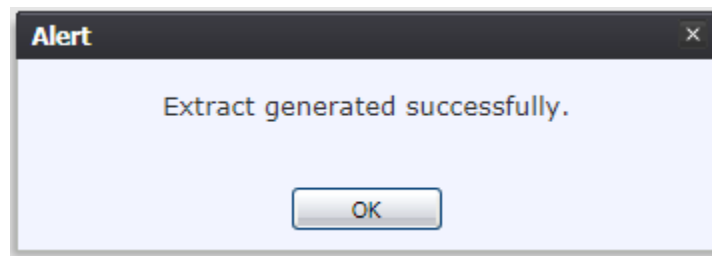


Figure 130: Extract Generated Successfully Message

5. Click **OK** to close the message.

Note: Extract files will need to be retrieved and downloaded using the Extract File Downloader screen.

8.3 Exercise 47—Voter Abstract Extract

1. From the Death Menu, select the **Tools/Extracts/Voter Abstract Extract** sub-menu. The extract criteria screen will open.
2. Enter/select all criteria on the screen:

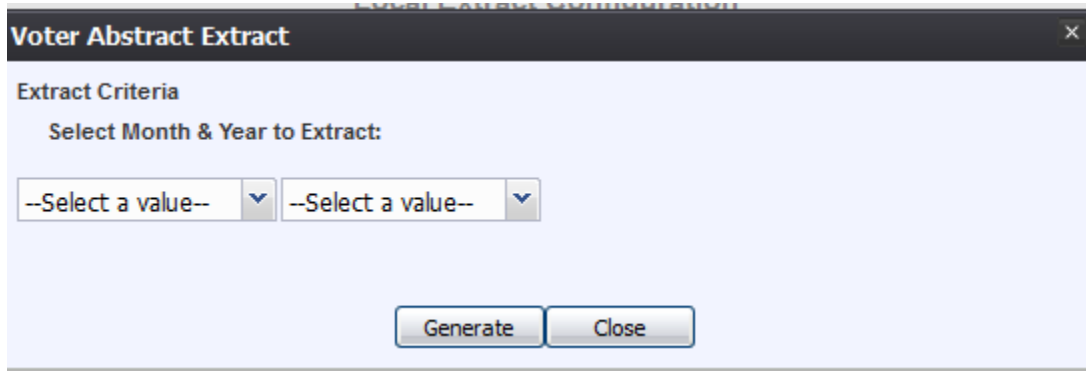


Figure 131: Local Extract Configuration Screen

3. Click the **Generate** button.
4. The application will issue a message that the extract has generated successfully.

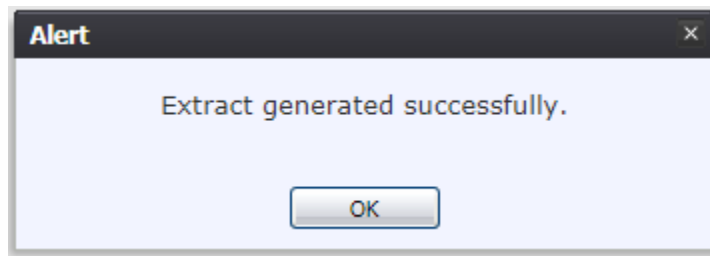


Figure 132: Extract Generated Successfully Message

5. Click **OK** to close the message.

Note: Extract files will need to be retrieved and downloaded using the Extract File Downloader screen.

8.4 Exercise 48—Extract File Downloader

The Extract File Downloader screen in the Death module provides users with the functionality to download the extracts that are uploaded to the server.

From the Death Home page, go to **Tools/Utilities/Extract File Downloader**.

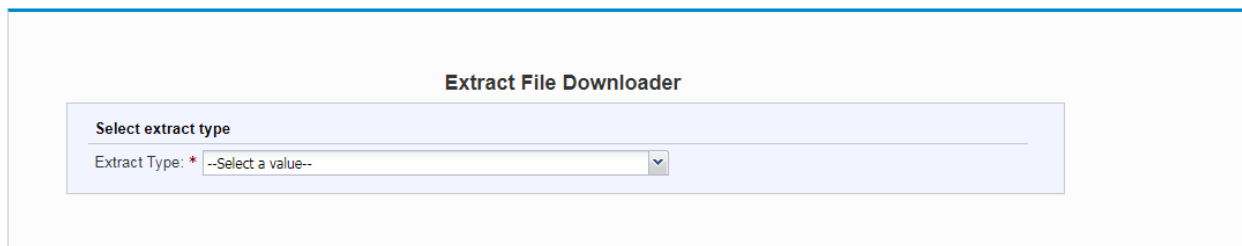


Figure 133: Extract File Downloader Screen

8.4.1 Retrieve Extract Files

Select the Extract Type from the **Extract Type** drop-down. The Extract File Download Screen grid will populate with extracts available for download.

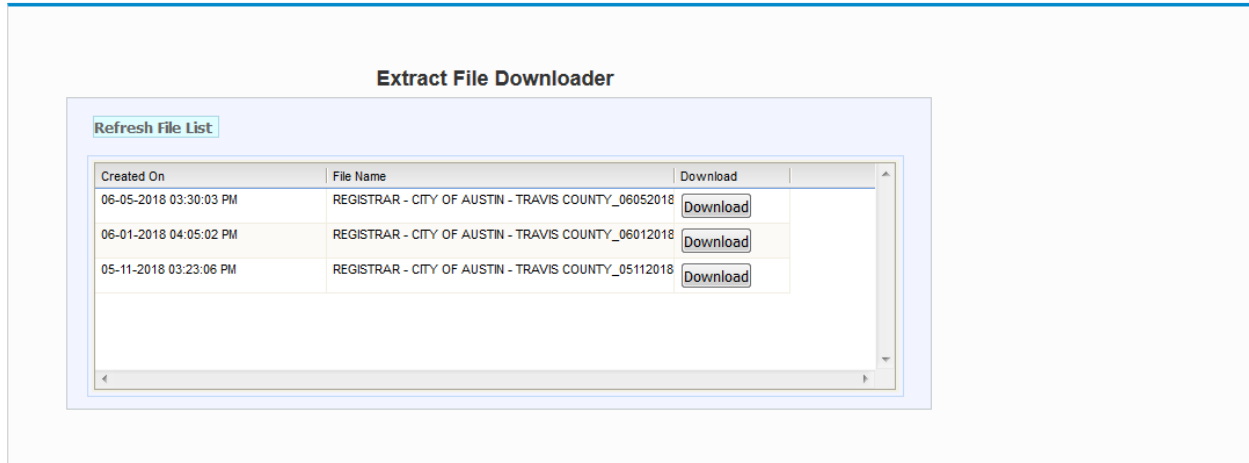


Figure 134: Extract File Downloader Grid

Click the **Download** button for the desired extract file. This will cause the system to generate the Download File screen.

9 Reports

This exercise provides an overview of the different reports available to Local users.

To complete this exercise, the user will need:

- ✓ Access to the Reports menu item
- ✓ The proper security process for each report

9.1 Exercise 49—Running a Report

1. From the Death Homepage, select the desired report from the Reports menu. A report options screen will appear:

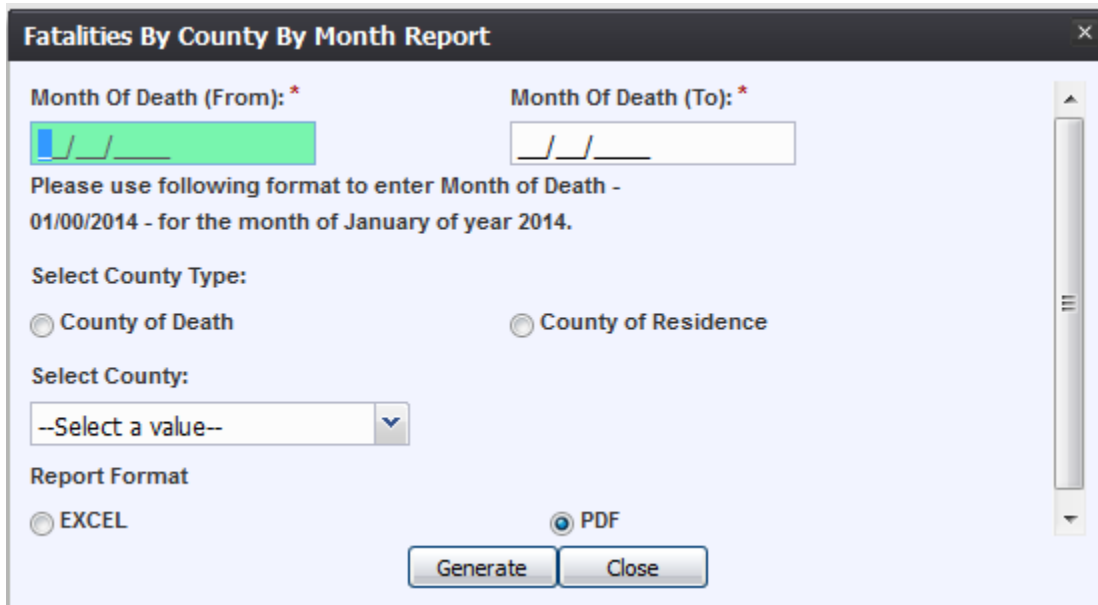


Figure 135: Report Options Screen

2. From this point, enter search criteria, select the file output type, and then click **Generate**.
Note: Similar to previous screens, fields marked with red asterisks (*) are mandatory fields and must be resolved in order for the report to generate.
3. Generating a report as a PDF will automatically process the report and open it in a separate window.
4. If **Excel** is selected as the output file type, the file will be downloaded and must be opened manually by the user.

Note: If the entered search information does not pull a report that can display any of the requested data, a page indicating that the user needs to try a different search, or alter the search information will generate.

10 Approvals

Sign-off Sheet

I have read the above TXEVER Death Module Local Training Guide and accept the contents herein written.

Project Sponsor: _____ **Date**

Senior Project Manager: _____ **Date**

Genesis Project Manager: _____ **Date**