TxEVER

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

Death Local Training Guide

Version 1.0

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Revision History

Date	Description	Version of System	Author
6/22/2018	Initial Document	1.0	Valerie Hooven

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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
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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:

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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
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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:

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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
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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:

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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
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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
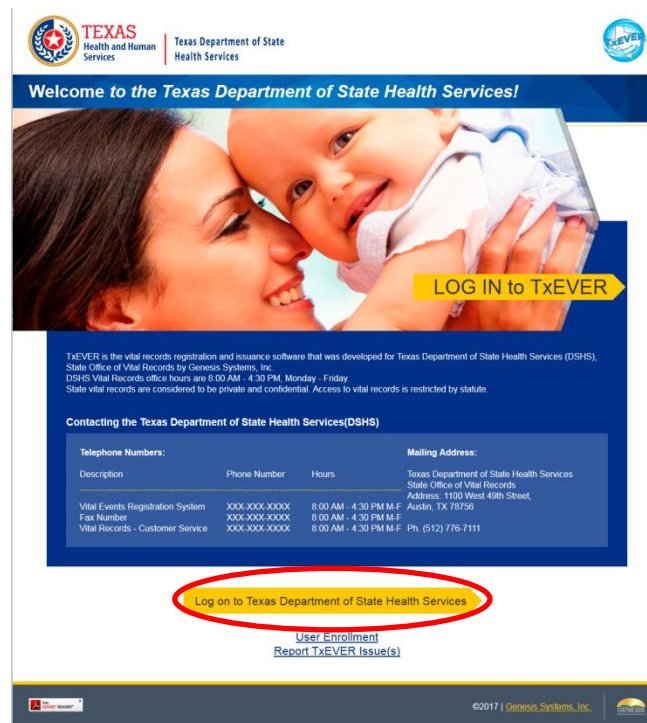
3. The application splash page will load, as pictured below:

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

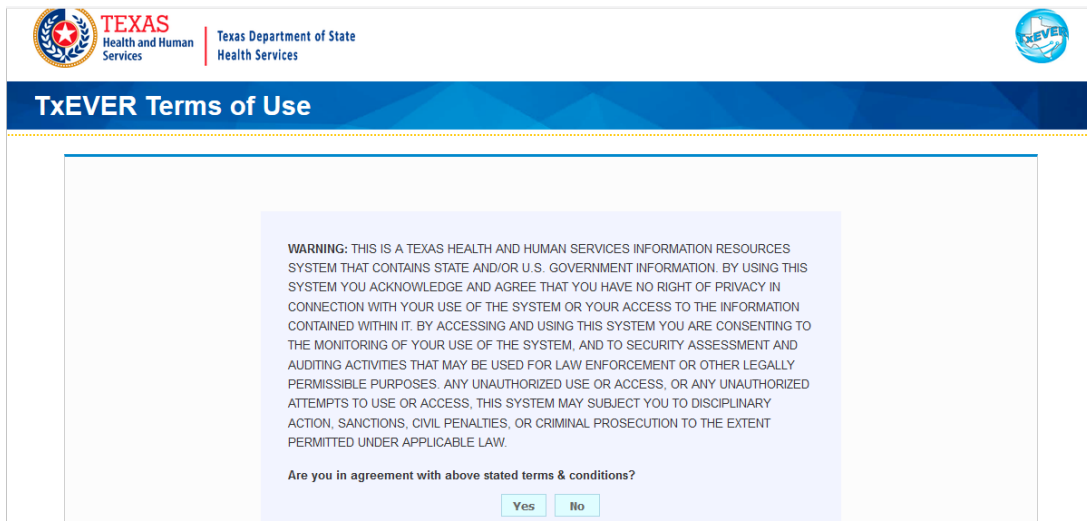5. The **Terms of Use Screen** will load, as pictured below:

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.
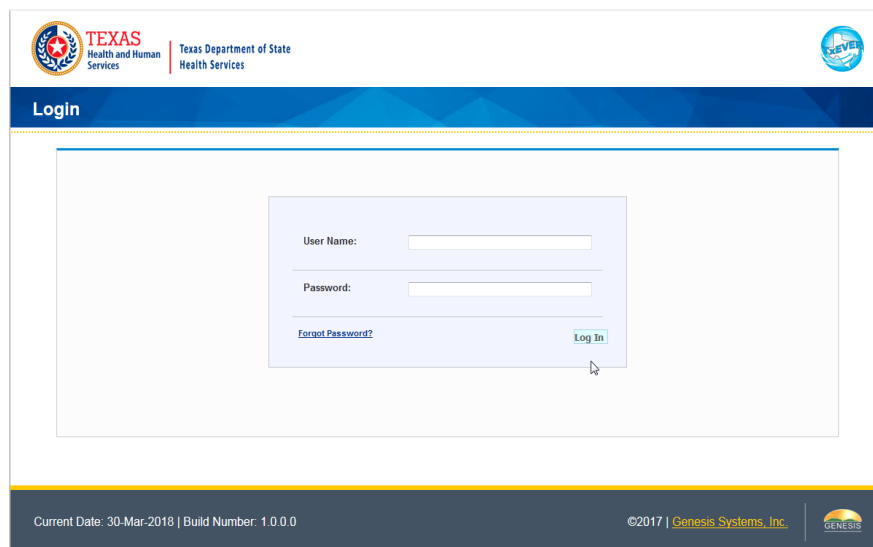
7. The TxEVER login screen will display:

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.
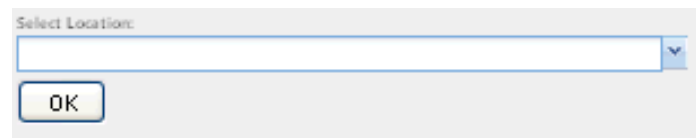

Figure 4: Select Location Screen

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 [LogOut] 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

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

Figure 8: New Record Screen

4. 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.
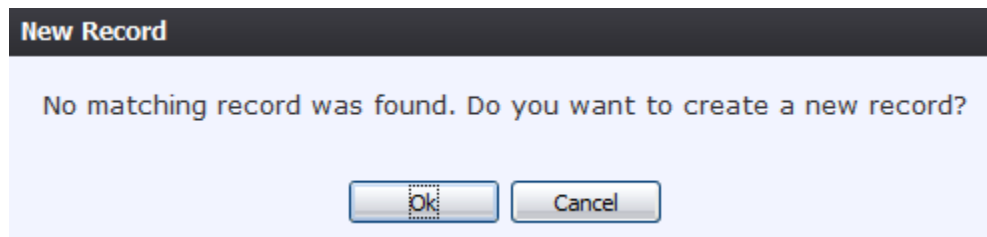
Figure 10: Record Creation Confirmation Message

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:

Figure 12: Death Search Screen Populated with Results

6. Click on the appropriate record in the grid. Select multiple records by holding down the **Ctrl** key and clicking on records.

7. Click **Select Record(s)** to retrieve record(s) to the work queue.

8. Select a record from the work queue by clicking on it to retrieve it to the screen.

9. 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.

1. 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.

2. From the list, select the appropriate record by clicking on it or, start typing decedent's last name into the field.
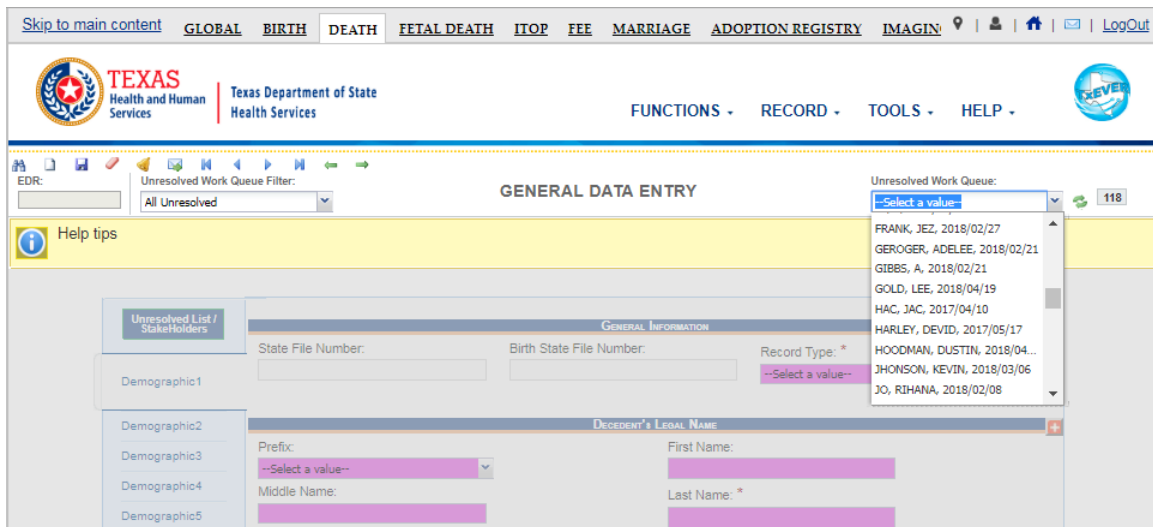
Figure 13: Unresolved Work Queue

3. 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:

1. Retrieve an existing record.

2. On the **General Data Entry** screen, click **Unresolved/StakeHolders** at the top to open the Unresolved Fields list.
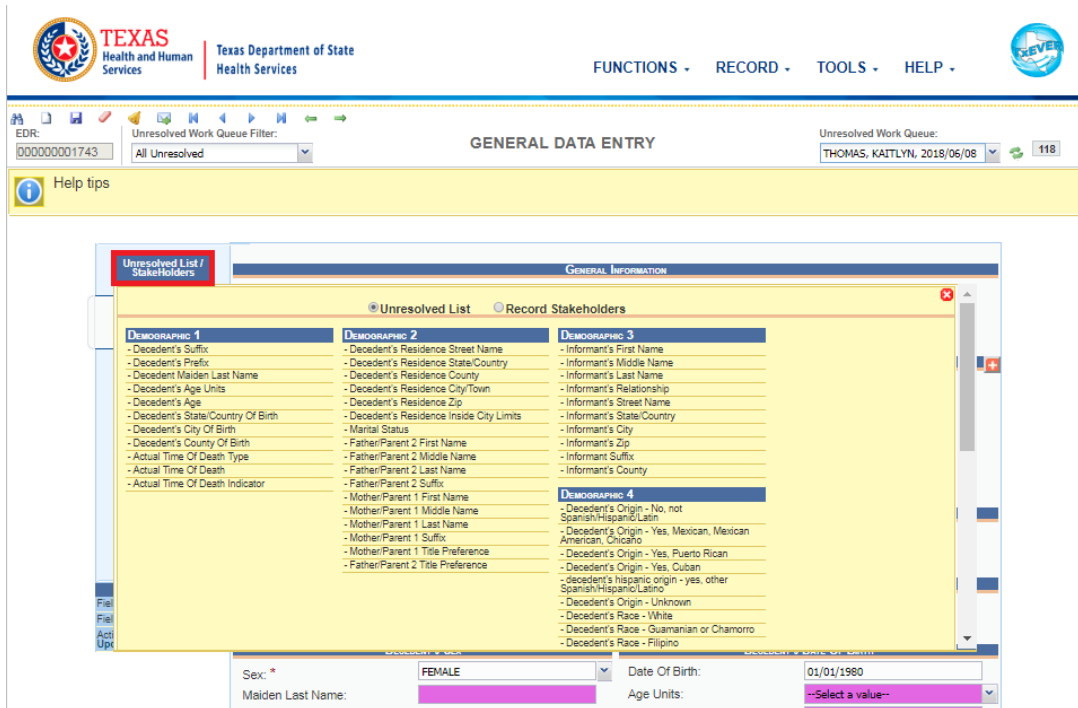
Figure 14: Unresolved Fields List

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:
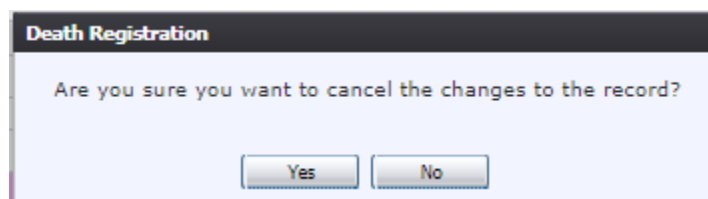
Figure 15: Cancel Changes Confirmation Message

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:

Death Registration   ✕

Record Saved Successfully.
SSN Verification Status:NEW
SSN Request Attempt No:1
Description:The decedent's information will be submitted to the Social
Security Administration's SSN Online Verification System. A response is
expected shortly.

OK
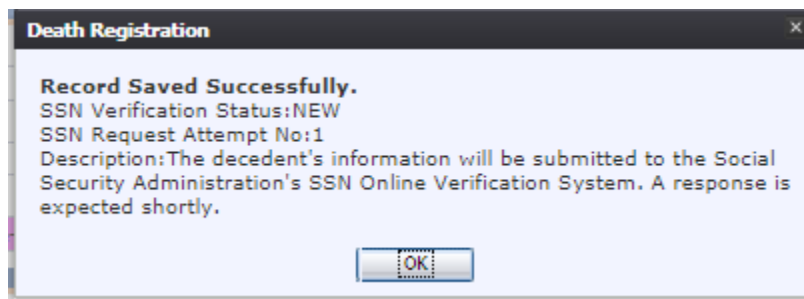
Figure 16: Record Update Confirmation Message

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:

Death Registration   ✕

Are you sure you want to abandon the record?

Yes   No
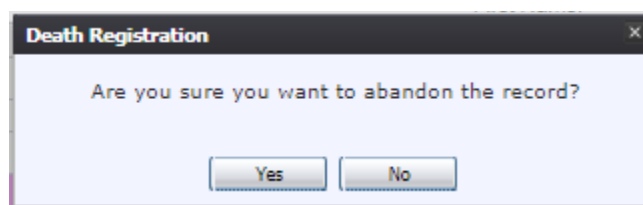
Figure 17: Record Abandon Confirmation Message

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:
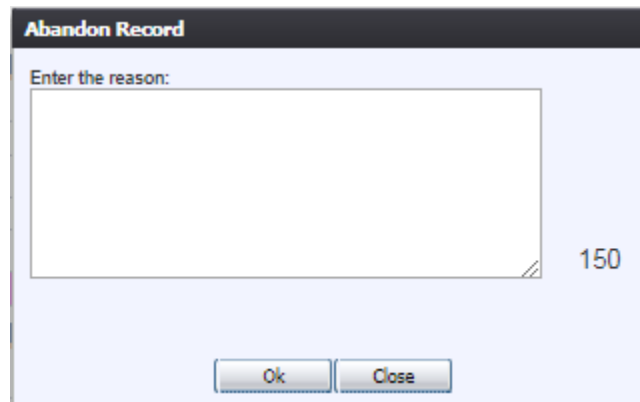
Figure 18: Abandon Record Comment Screen

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:
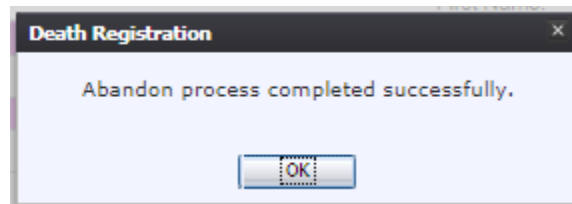
Figure 19: Abandon Completion Confirmation Message

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:
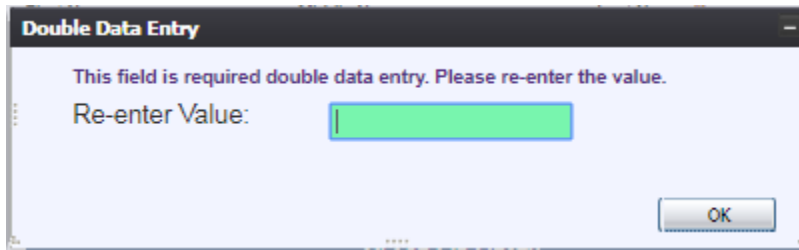
Figure 1: Double Data Entry Screen

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:
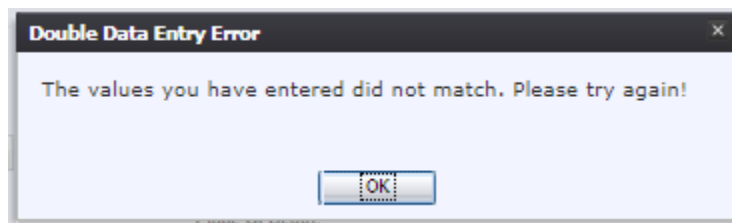
Figure 21: Double Data Entry Error Screen

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.

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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.

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).

Figure 26: Add AKA Names Button

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

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.
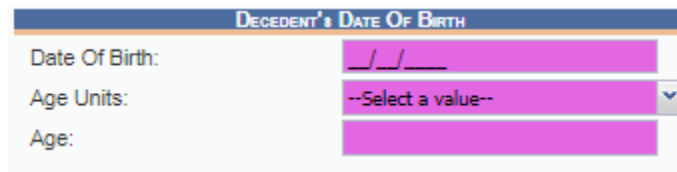
Figure 28: Decedent's Date of Birth Fields

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:
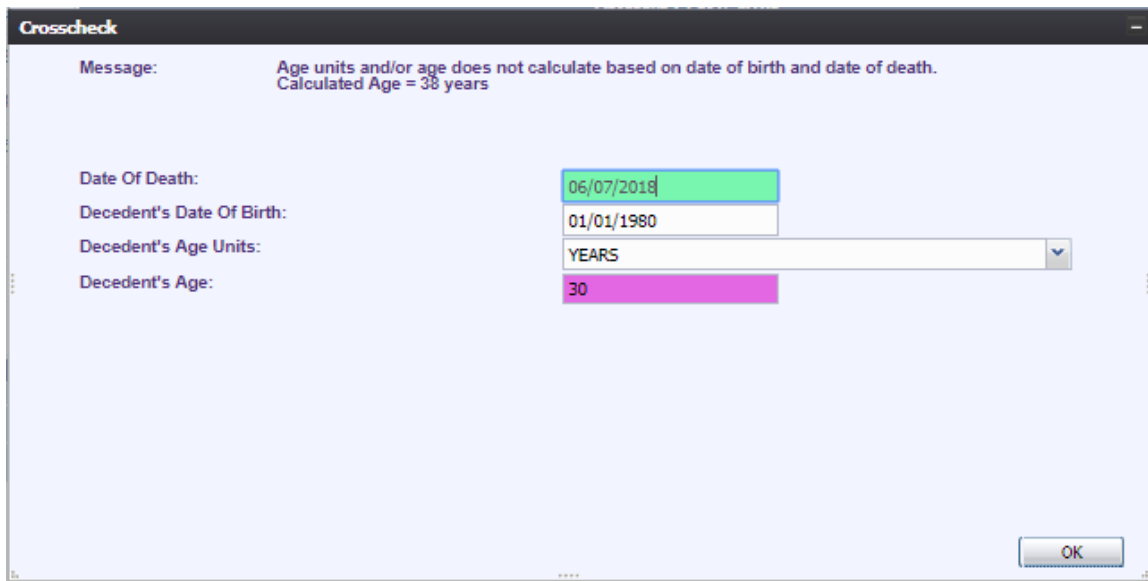
Figure 29: Decedent Date of Birth Crosscheck Screen

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.
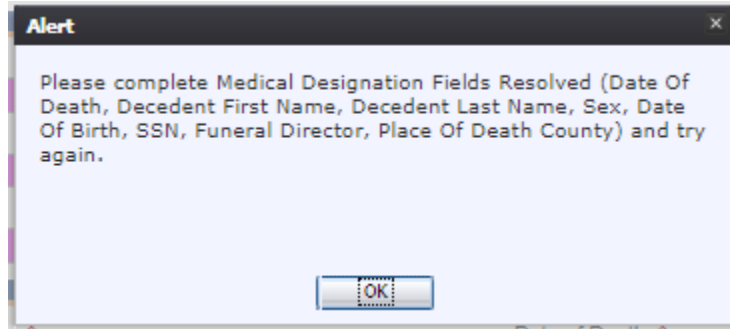
Figure 31: Medical Designation Alert Message

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:

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.

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:
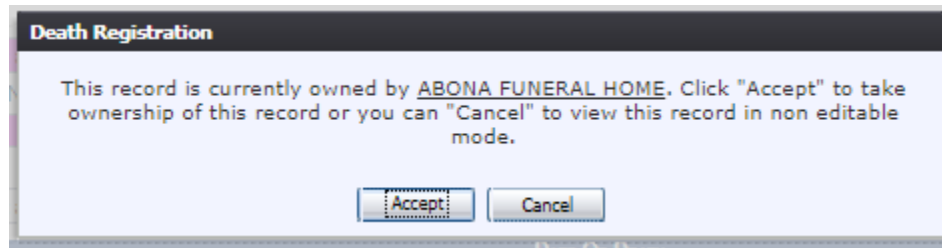
Figure 35: Take Ownership Confirmation Message

    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:
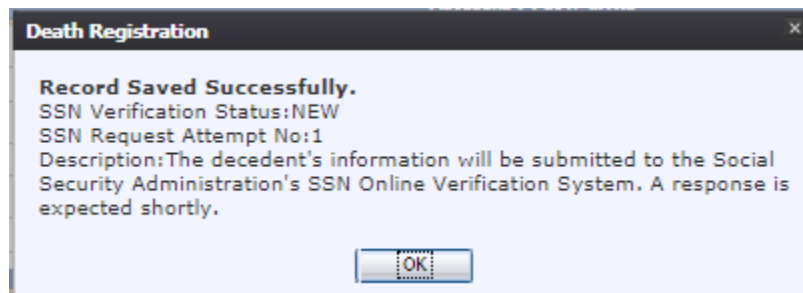
Figure 36: Record Saved Successfully Message

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:
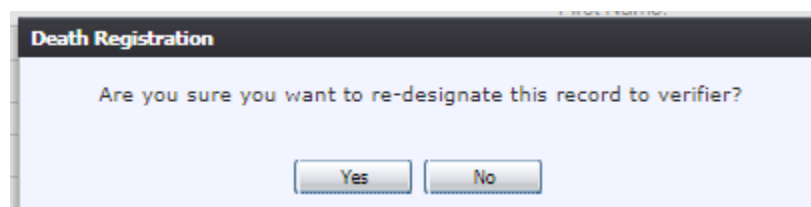
Figure 37: Re-Designate Confirmation Message

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:

Death Registration

Are you sure you want to relinquish the record?

Yes   No
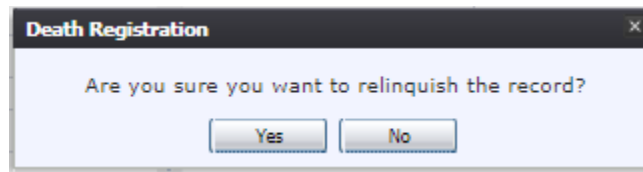
Figure 38: Relinquish the Record

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

GDE Relinquish

Enter the reason:

150

Ok   Close
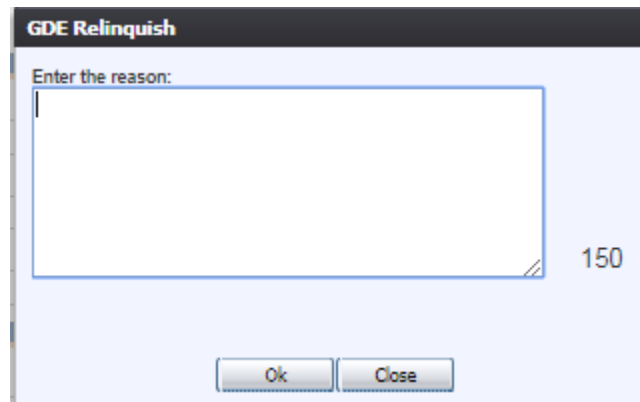
Figure 39: GDE Relinquish Reason Message

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.

Death Registration

Relinquish process completed successfully.

OK
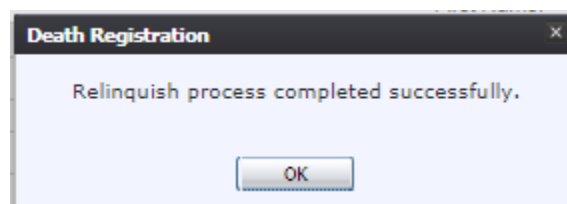
Figure 40: Relinquish Process Completed Successfully

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:
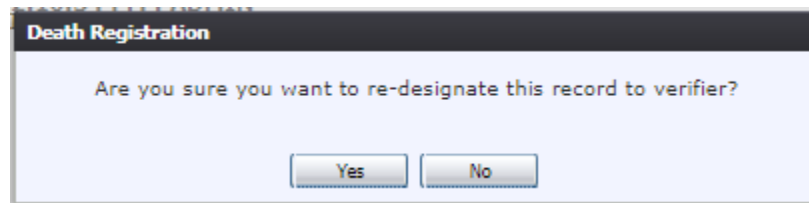
Figure 41: Re-Designate Record to Verifier

5. Click **Yes** to confirm that you wish to re-designate the demographic verifier on the record. The following screen will appear:
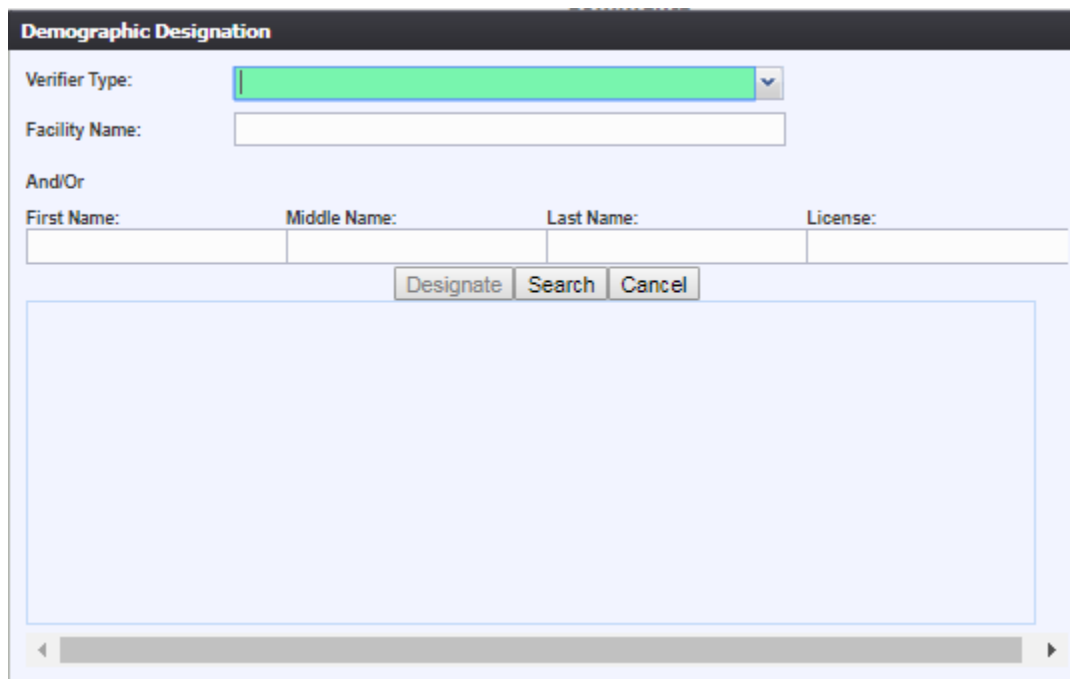
Figure 42: Demographic Designation Screen

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
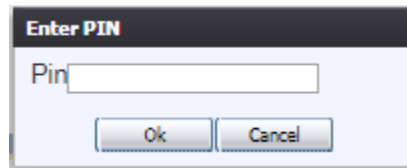
Figure 43: Enter PIN Message

4. Enter the PIN and click **OK**.
5. If the correct PIN is entered, the following message will load:
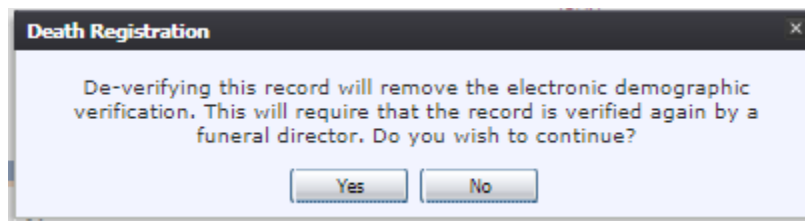
Figure 44: De-Verify Confirmation Message

6. Click **Yes** to confirm de-verification of the record and the comment box will load.
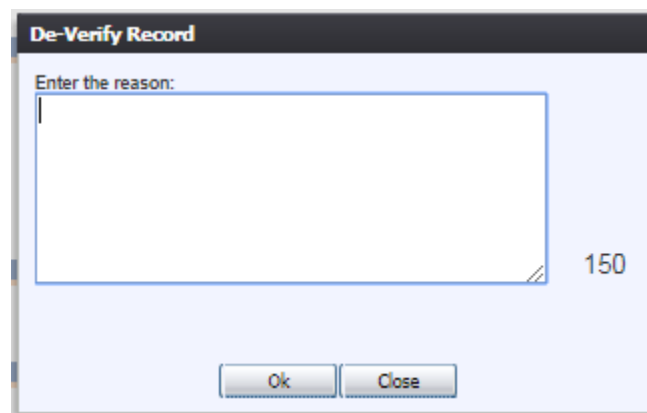
Figure 45: De-Verify Record Reason Message

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:
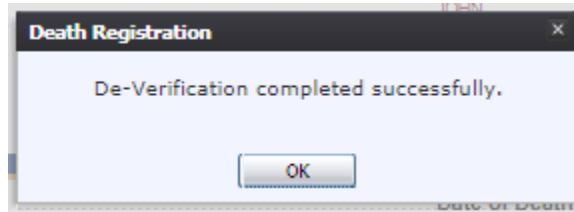
Figure 46: De-Verification Completed Successfully Message

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:
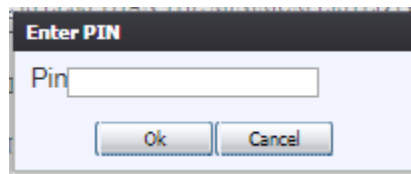
Figure 47: Enter PIN Message

4. Enter the PIN and click **OK**.
5. If the correct PIN is entered, the following message will appear:
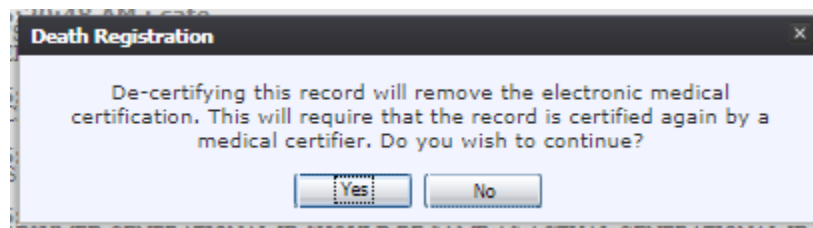
Figure 48: De-Certify Confirmation Message

6. Click **Yes** to confirm de-certification of the record and the comment box will load:
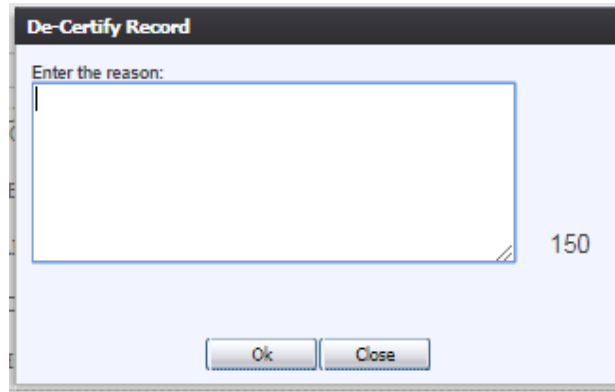
Figure 49: De-Certify Record Comment Box

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:
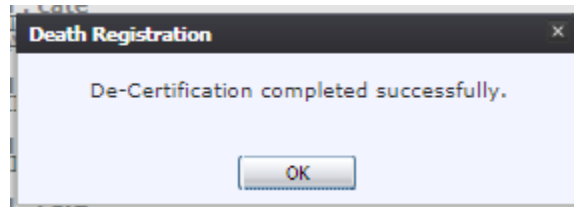
Figure 50: De-Certification Completed Successfully Message

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:
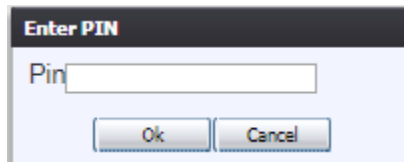
Figure 2: PIN Entry Screen

3. Enter the PIN and click on **OK**.

4. If the correct PIN is entered, the following message will load:
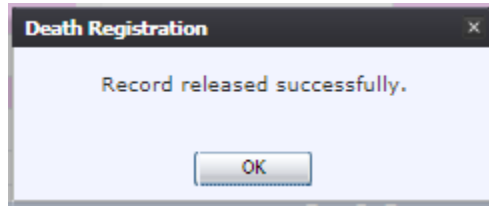
Figure 52: Record Released Successfully

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.
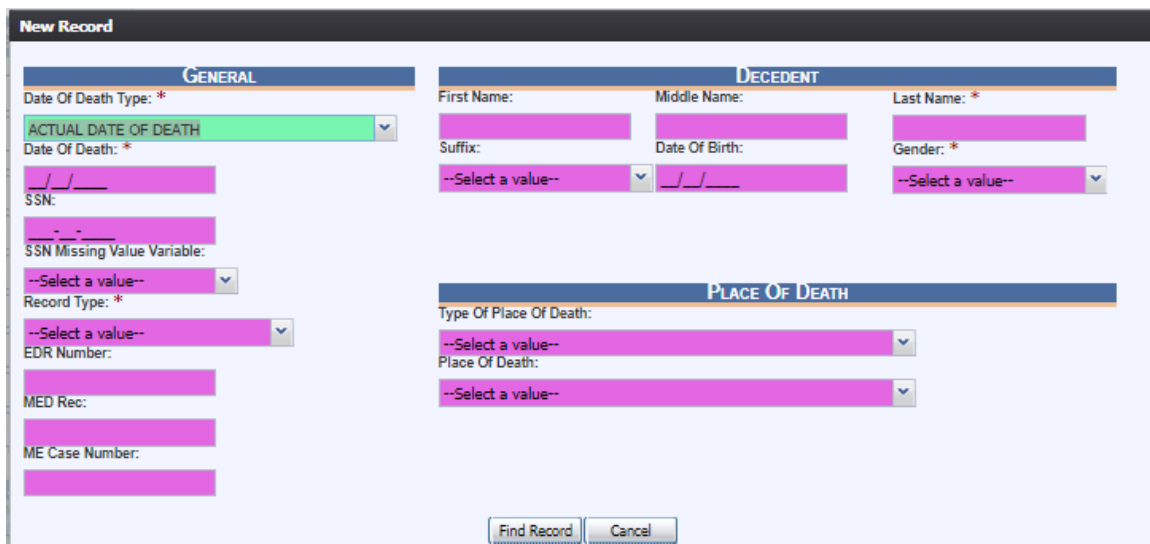
To complete this exercise, the user will need to:

   ✓ 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:

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.

New Record

No matching record was found. Do you want to create a new record?

Ok   Cancel
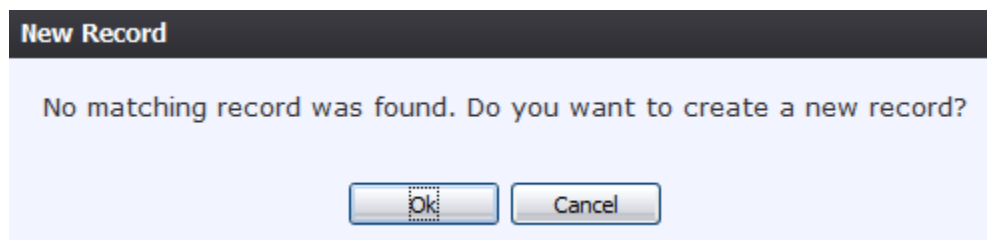
Figure 55: Record Creation Confirmation Message

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:
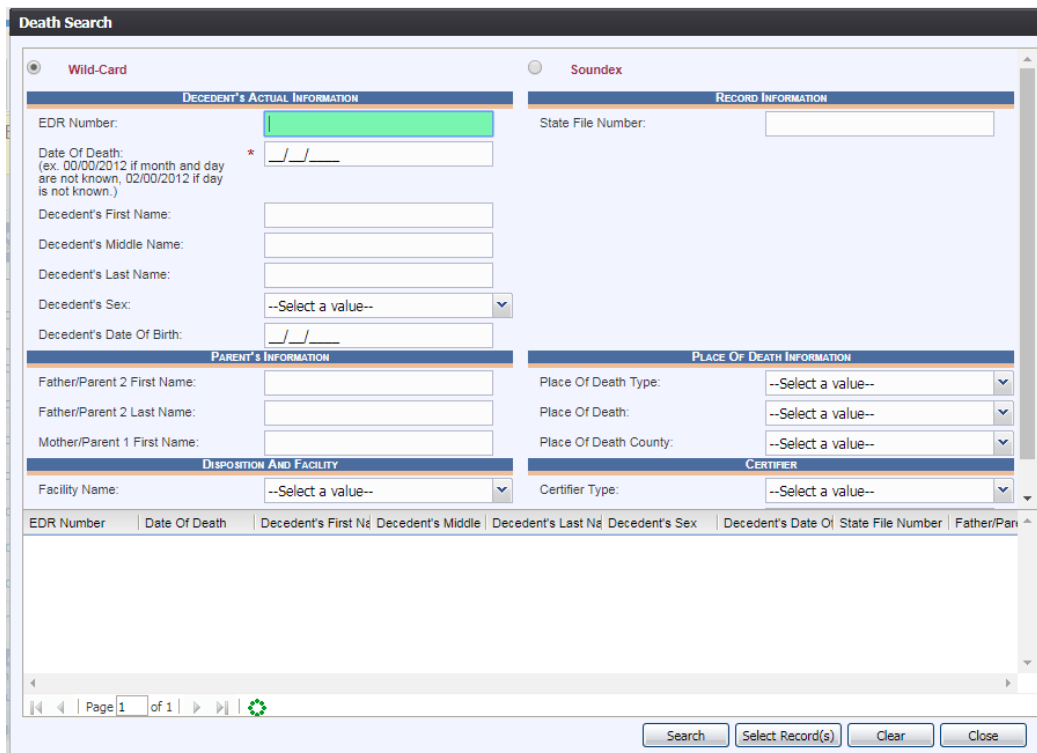
Figure 56: Death Search Screen

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.

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.
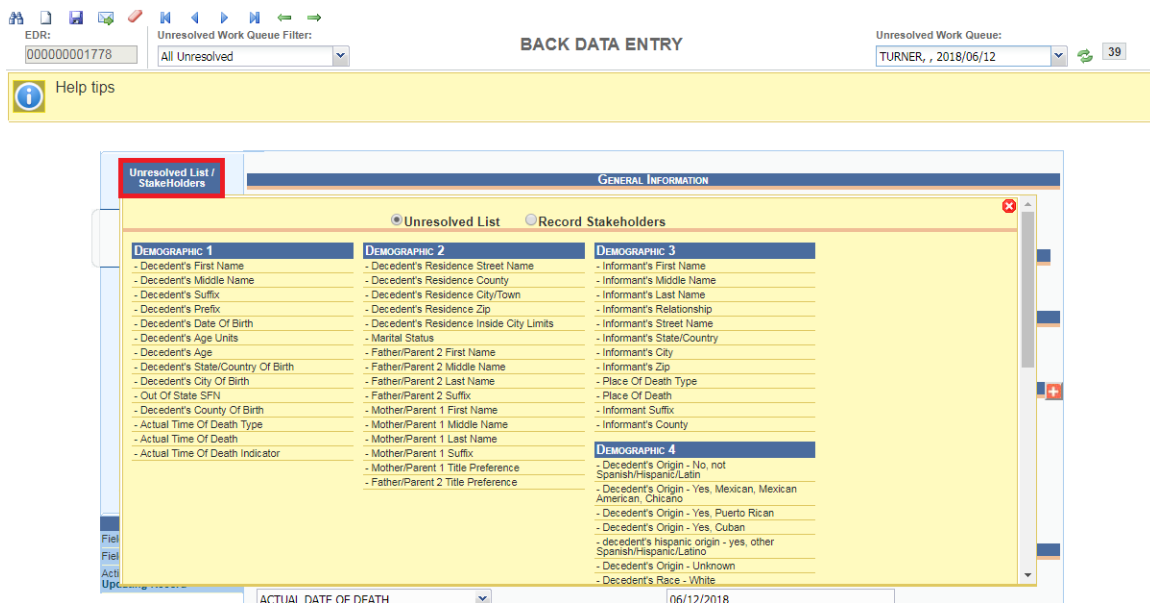
Figure 58: Unresolved Fields List

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:
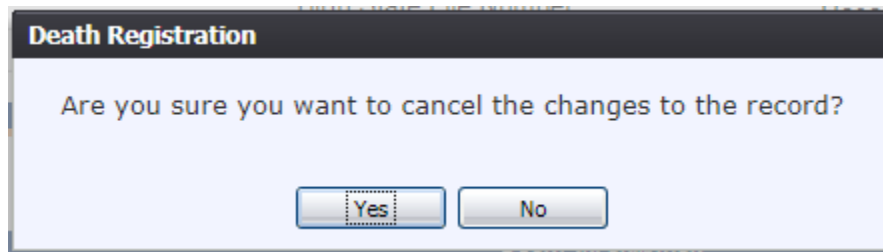
Figure 59: Cancel Changes Confirmation Message

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:
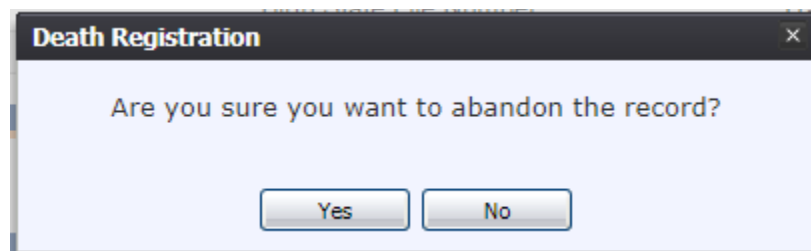
Figure 60: Record Abandon Confirmation Message

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.
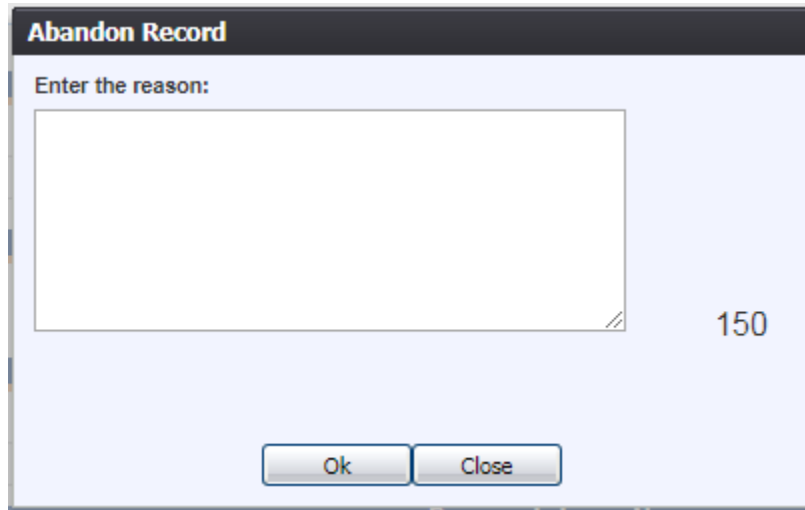
Figure 61: Abandon Record Comment Screen

3. After providing a comment and clicking **OK**, the following message will appear and the record will be removed from the Unresolved Work Queue.
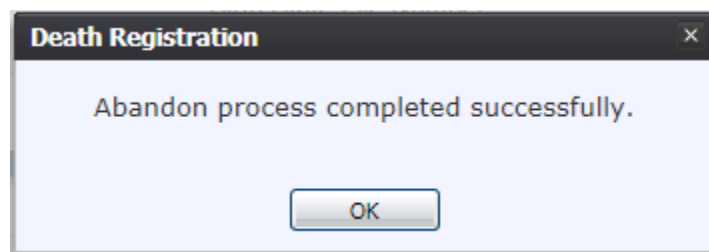
Figure 62: Record Abandon Completion Confirmation Message

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).

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:
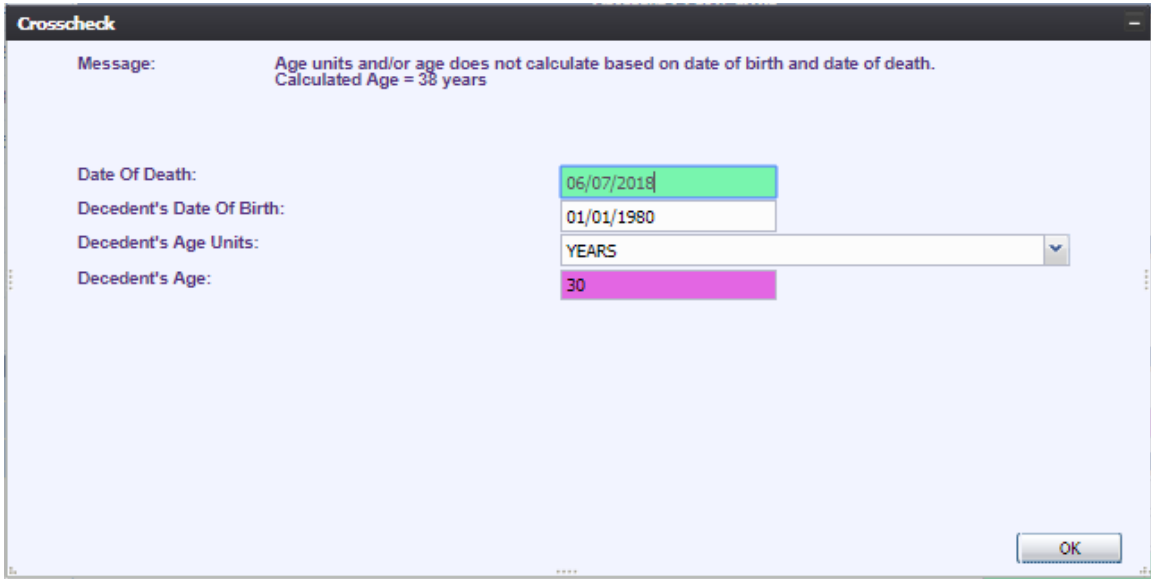
Figure 68: Decedent Date of Birth Crosscheck Screen

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.

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.

Figure 71: Certifier Search Fields

3. The Medical Certifier Search Screen will load:

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.

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:
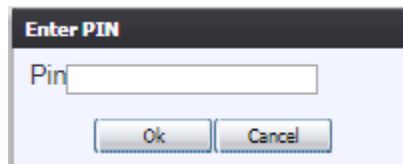
Figure 74: PIN Entry Screen

3. Enter the PIN and click on **OK**.

4. If the correct PIN is entered, the following message will load:
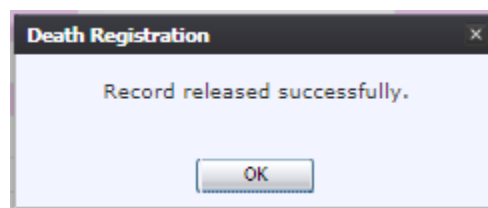
Figure 75: Record Released Successfully

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.
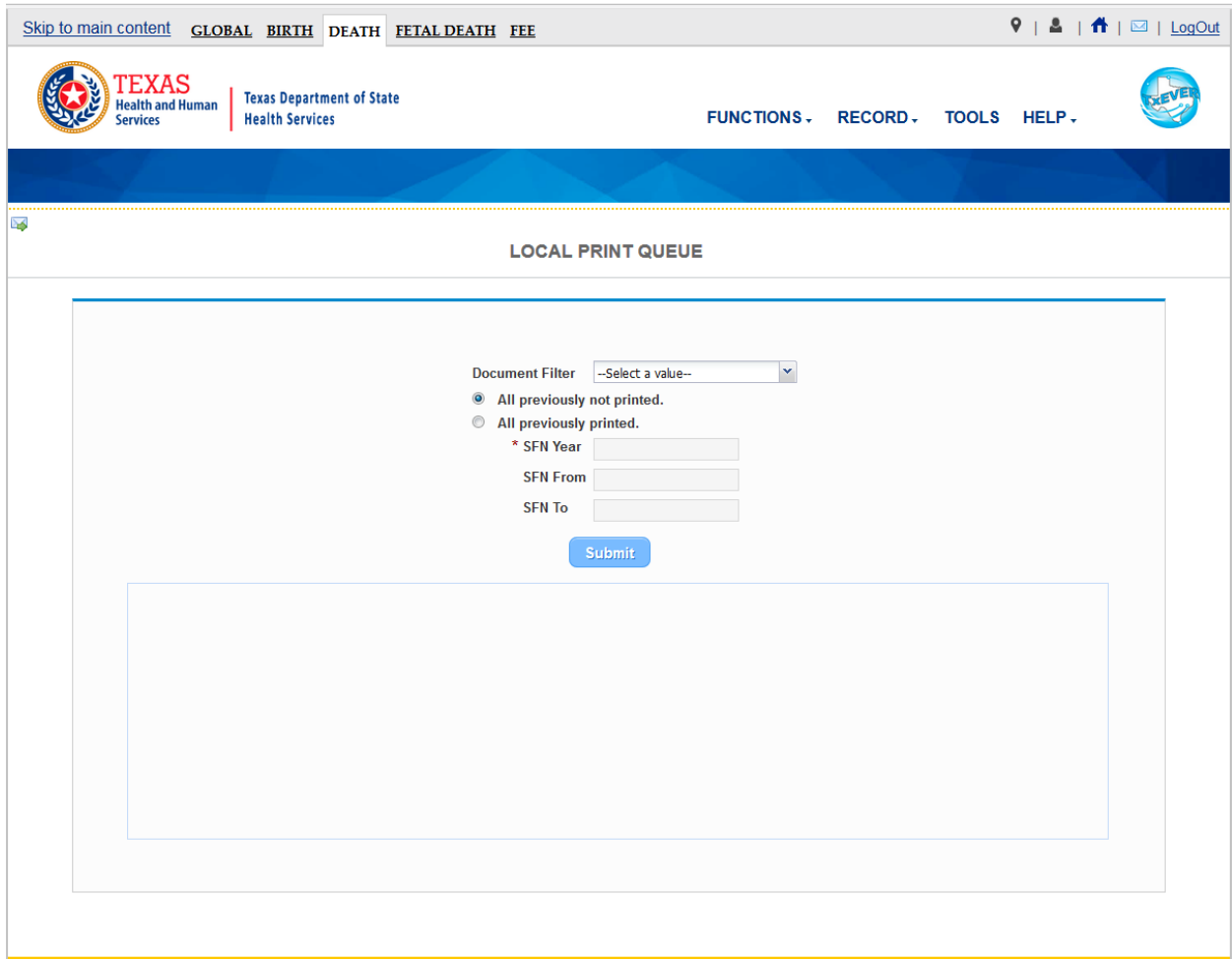
Figure 76: Local Print Queue Screen

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

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:

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:

Figure 79: State Batch Print-Select checkboxes

5. Click the **Print** button to print all selected records.

6. The system will issue the following message:
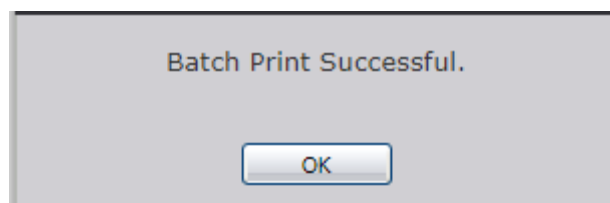
Figure 80: Batch Print Message

7. Click **OK** to close the message and open all requested records in a PDF window for printing.

8. 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):

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:

Figure 84: Local Burial Transit Permit Queue

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

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):
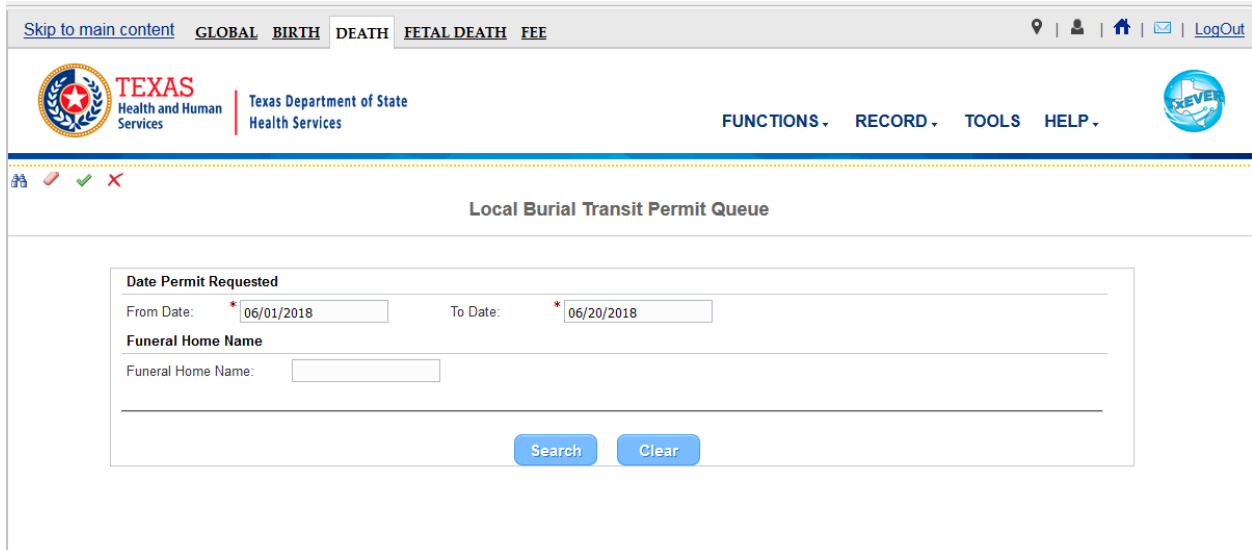
Figure 86: Local Permit Print Queue Screen

3. Click the **Search** button to find all permits requested in the selected date range:
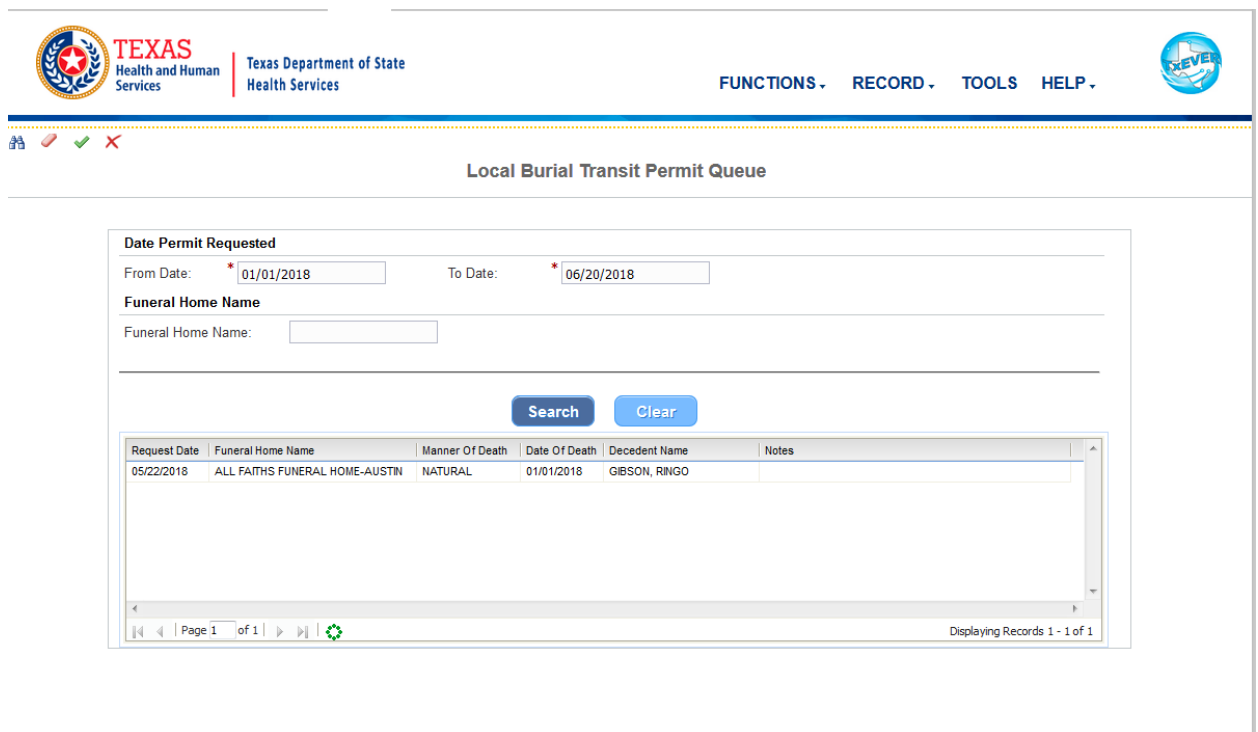
Figure 87: Local Burial Transit Permit Queue

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

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:
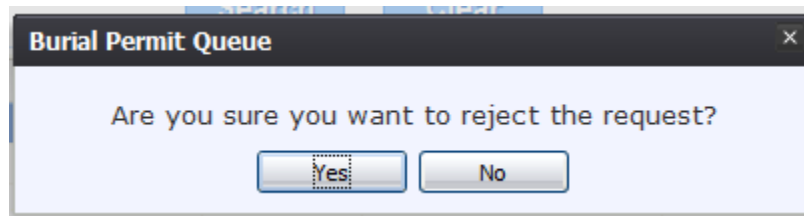
Figure 89: Record Rejection Confirmation Message

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:
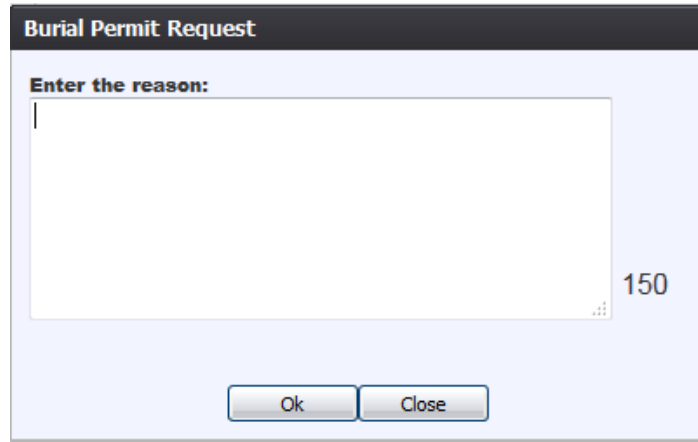
Figure 90: Burial Permit Request Comment Screen

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:
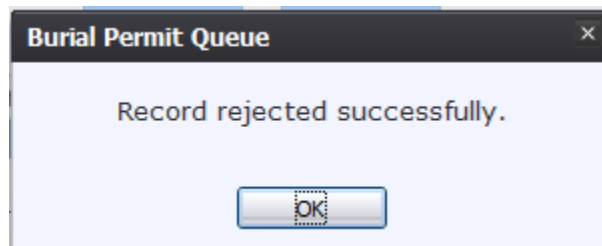
Figure 91: Record Rejected Successfully Message

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:
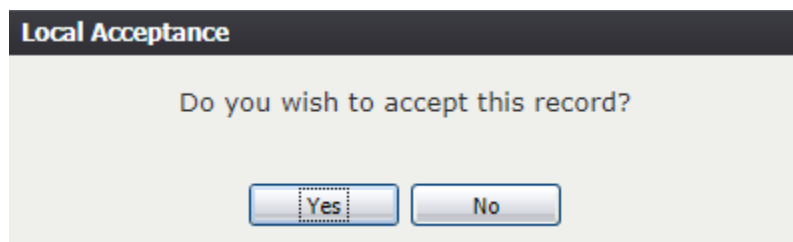
Figure 92: Record Acceptance Confirmation Message

4. Click **Yes** to accept the record. Click **No** to cancel.

5. Once the record has been accepted, the following message will appear:
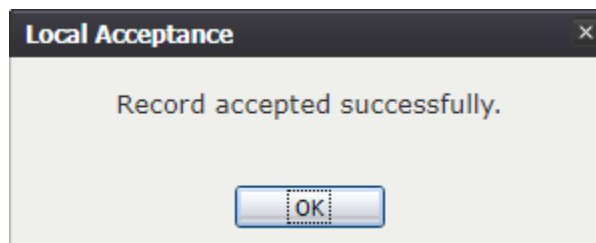
Figure 93: Record Accepted Successfully Message

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:
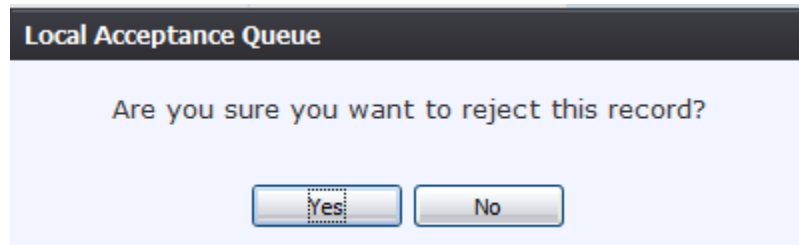
Figure 94: Record Rejection Confirmation Message

4. Click **Yes** to reject the record. Click **No** to cancel.

5. The Reject Record Comment screen will appear:
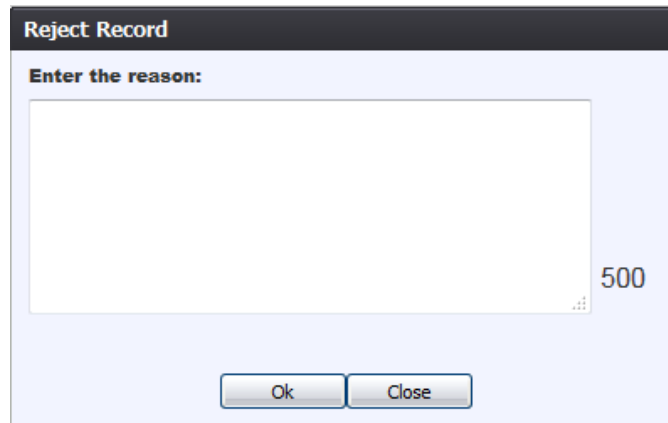
Figure 95: Reject Record Comment Screen

6. Enter the reason for the rejection of the record and then click the **OK** button.

7. The application will issue the following message:
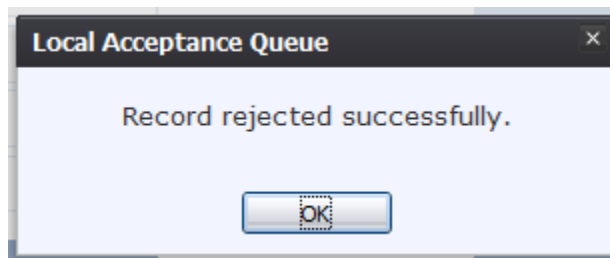
Figure 96: Record Rejected Successfully Message

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:

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:

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:
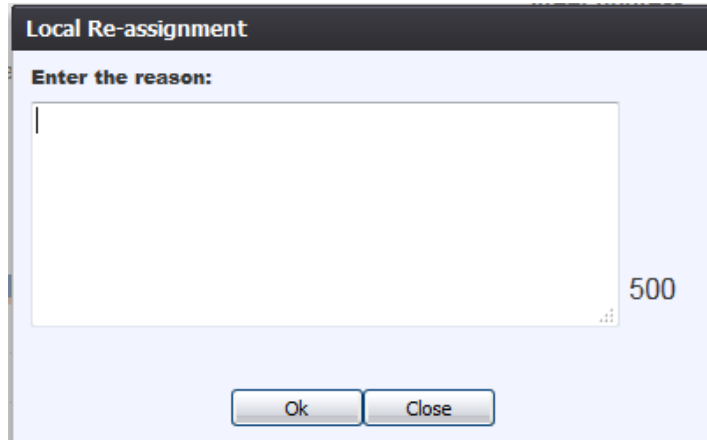
Figure 99: Local Re-Assignment Comment Screen

8. Enter the reason for the local-reassignment and then click the **OK** button.

9. The application will issue the following message:
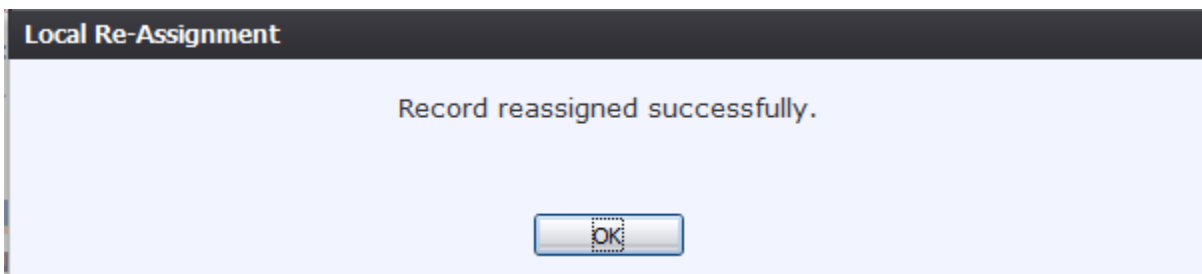
Figure 100: Record Reassigned Successfully Message

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 [icon] to open the Local Reassignment screen:

Figure 101: Main Local Re-Assignment Screen

3. Select the **Process/View Corrections** menu item or click the View Corrections [icon] icon.

4. The Correction Viewer Screen will appear:
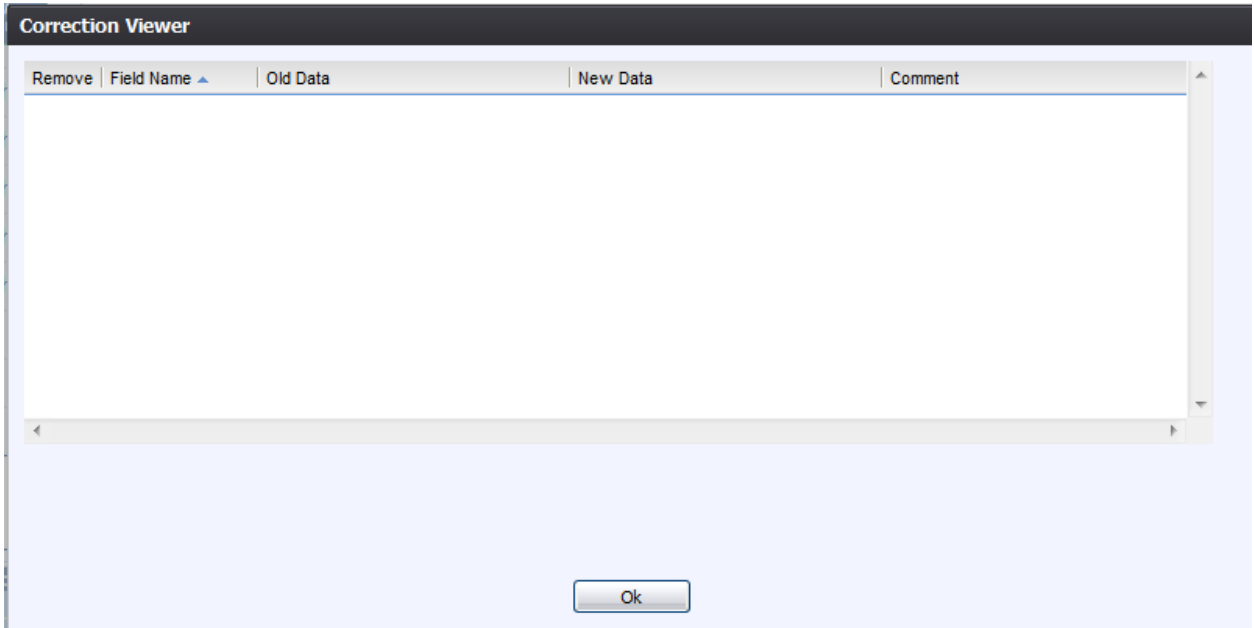
Figure 102: Correction Viewer Screen

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.

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:

Death Record Net Change History View

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

Evidence Documents

Document	Type	Date	Issued By	User ID	Date		

Print   Close

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:

Figure 106: Main Correction Screen

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

Figure 107: Correction Screen

6. The correction screen displaying the old data and the new data will open. Enter the corrected value into the field.

7. 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 📁.
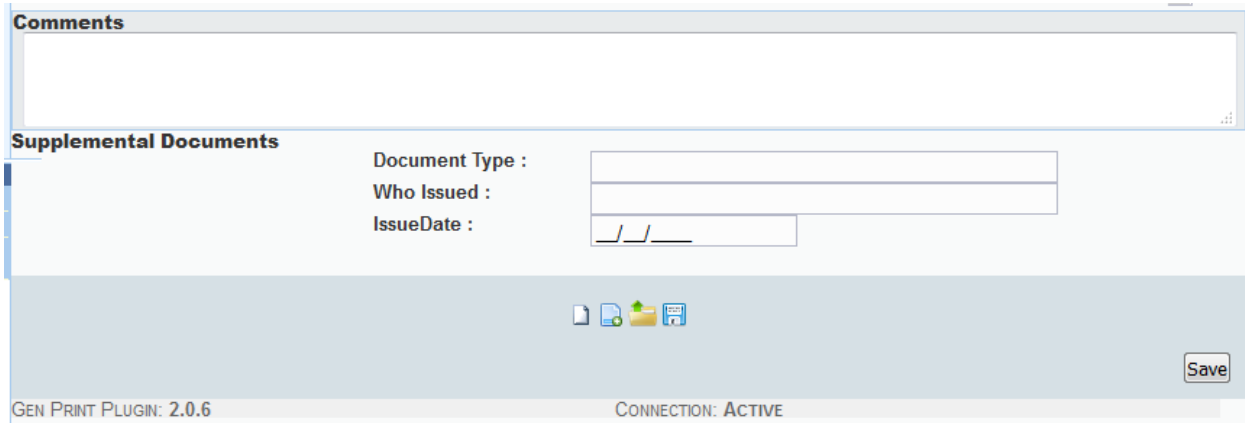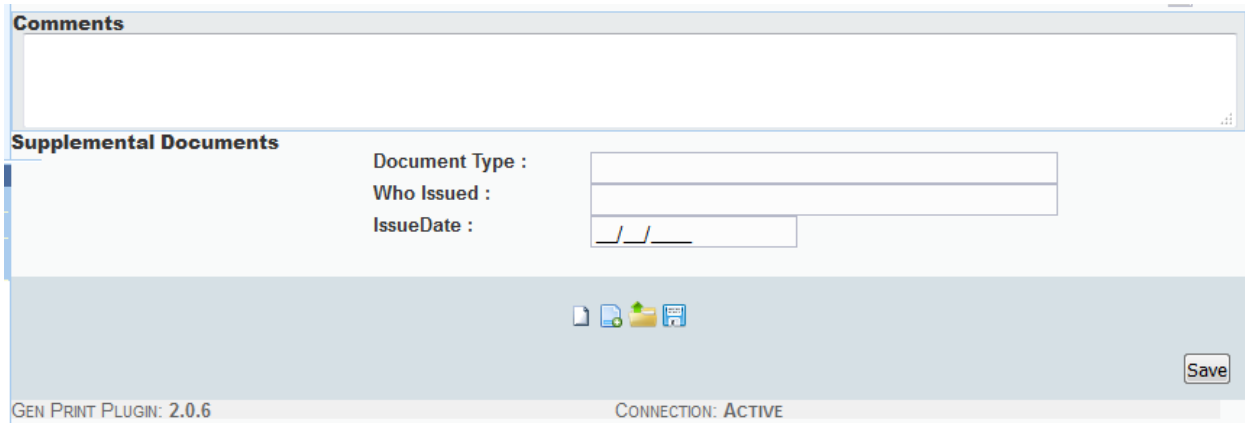
Figure 108: Supplemental Documents Section

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.

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.

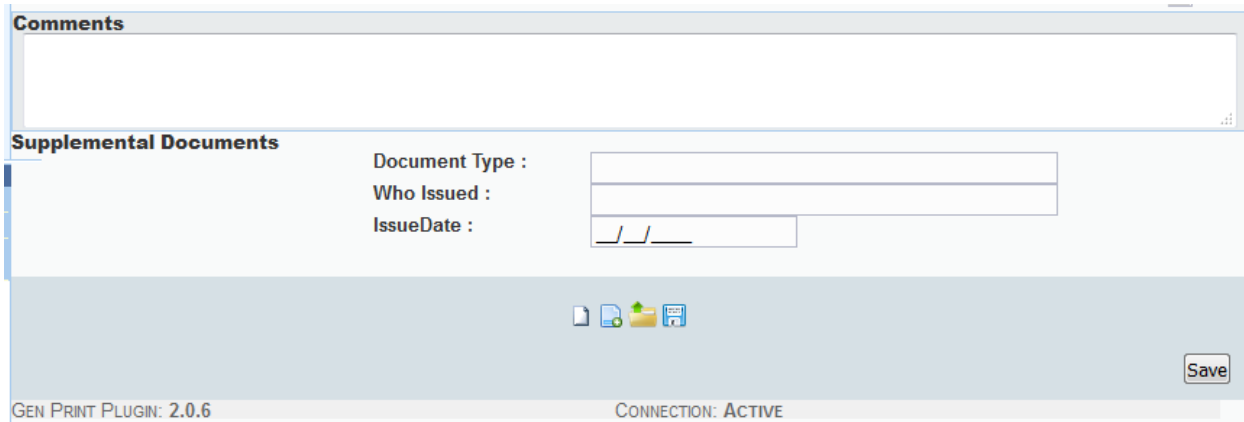4. Click **Scan Document** to scan the document.

   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.

Figure 111: Supplemental Documents Section

2. The **File Upload** screen will appear.
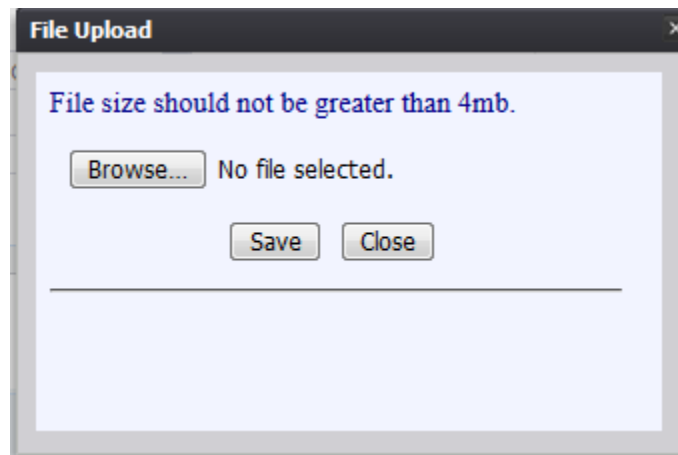
Figure 112: File Upload Screen

3. Click the **Browse** button to open the **File Upload** screen.

4. Locate the desired .tif or .tiff file and click the **Open** button.

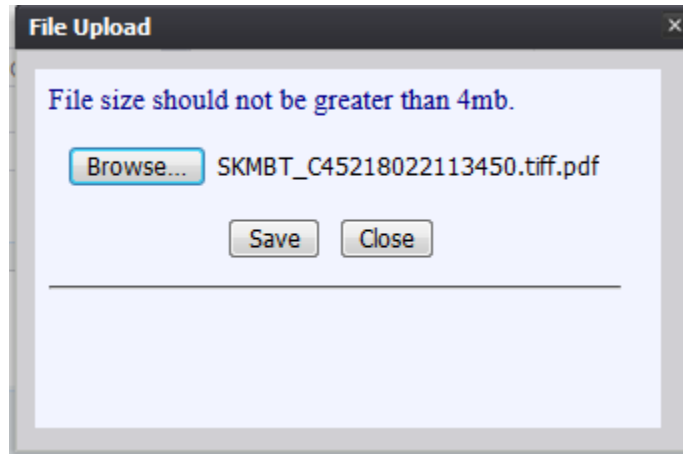5. The **File Upload** screen will appear as seen below:

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 **Correction**s 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:
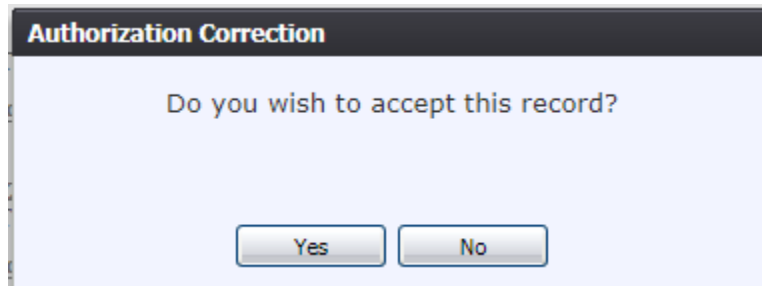

Figure 114: Record Submission Confirmation Message

   a. Click **Yes** to continue with submission of the record.

   b. Click **No** to cancel submission of the record.
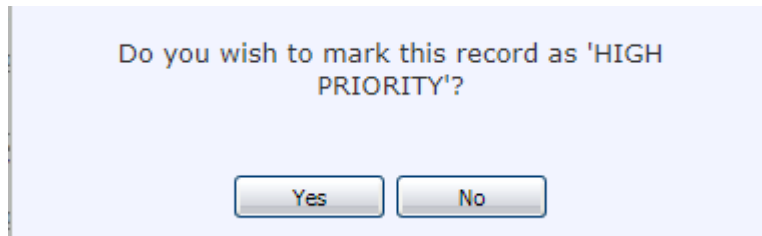
2. The following message will appear:

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:

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:

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 .
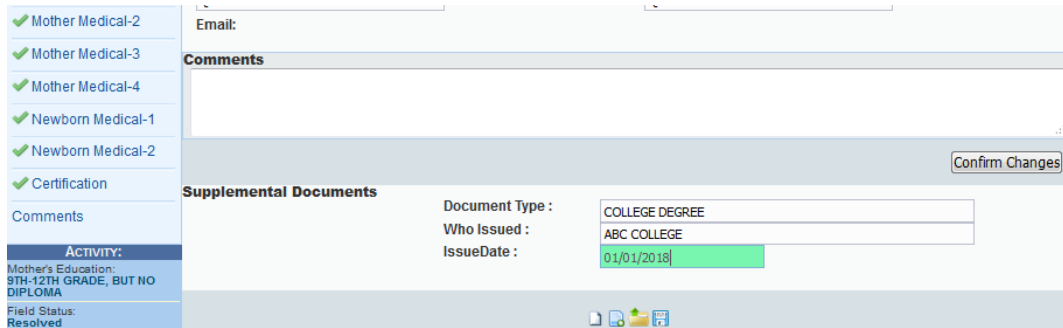

Figure 118: Supplemental Documents Section

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.

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.

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.

Figure 121: Supplemental Documents Section with Details Entered

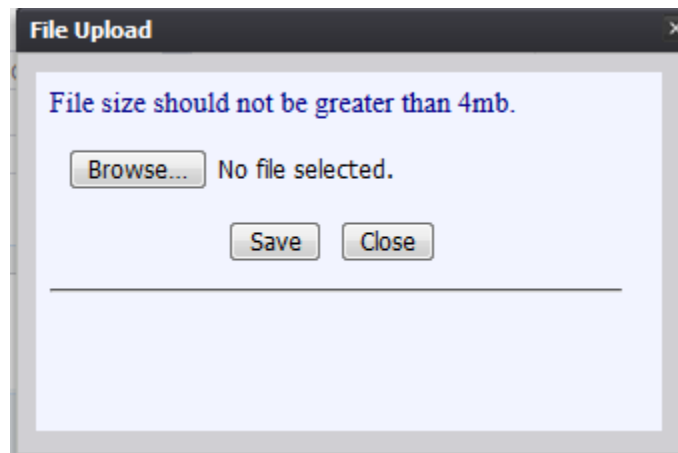2. The **File Upload** screen will appear.

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:
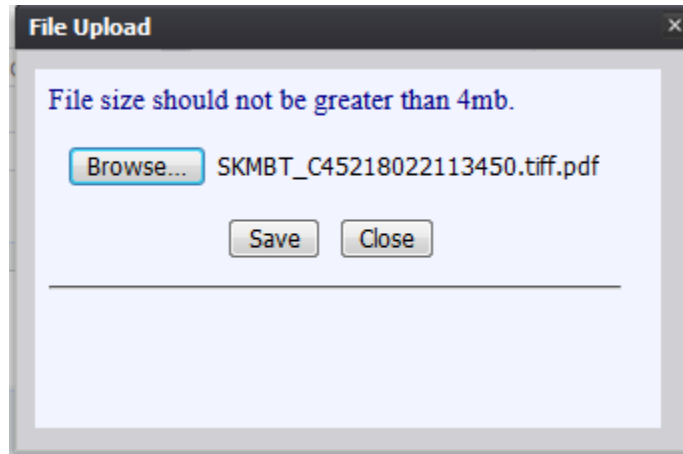
Figure 123: File Upload Screen with File Selected

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:
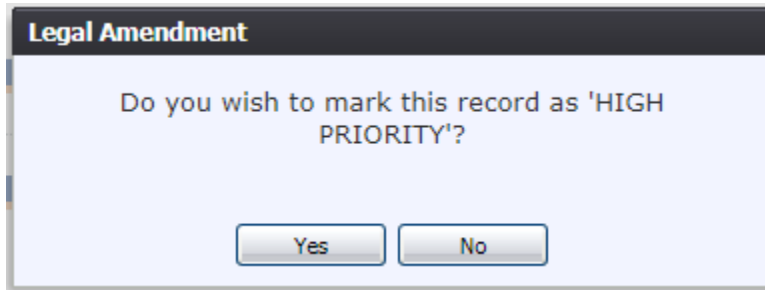
Figure 125: High Priority Submission Confirmation Message

 a. Click **Yes** to submit the record as high priority.

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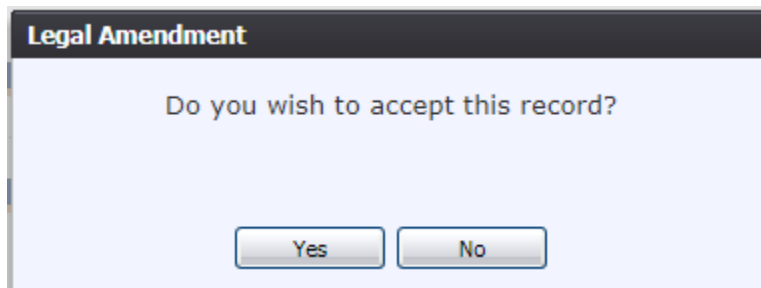
3. A message will appear that the record has been submitted successfully.

 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

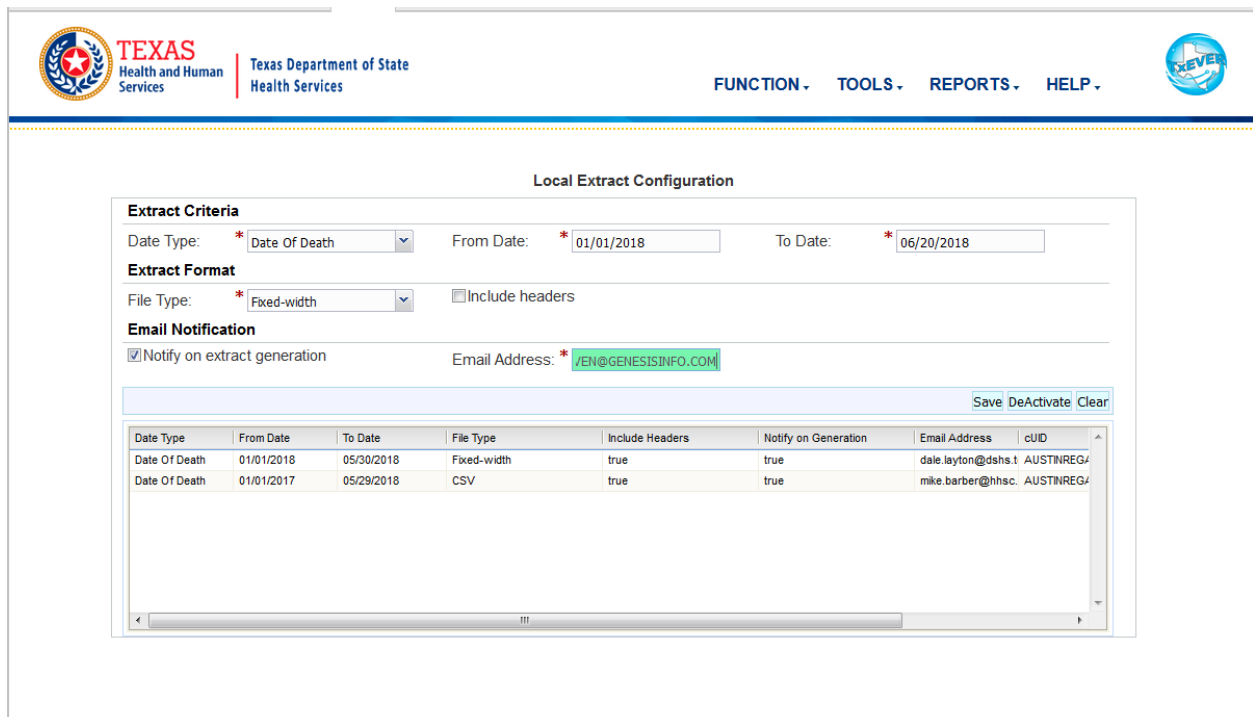**Note:** Other extracts available for death records are all produced through a scheduled task that is the responsibility of a Database Administrator (DBA). The extracts described below are the extracts available on demand from the TxEVER Death Application.

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:

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.
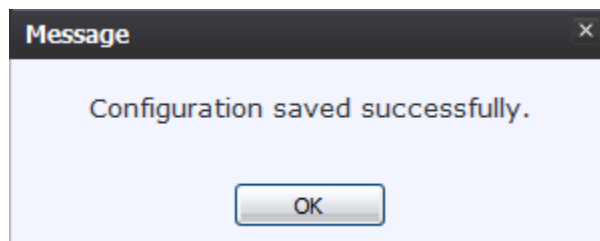

Figure 127: Configuration Saved Successfully Message

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:

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:
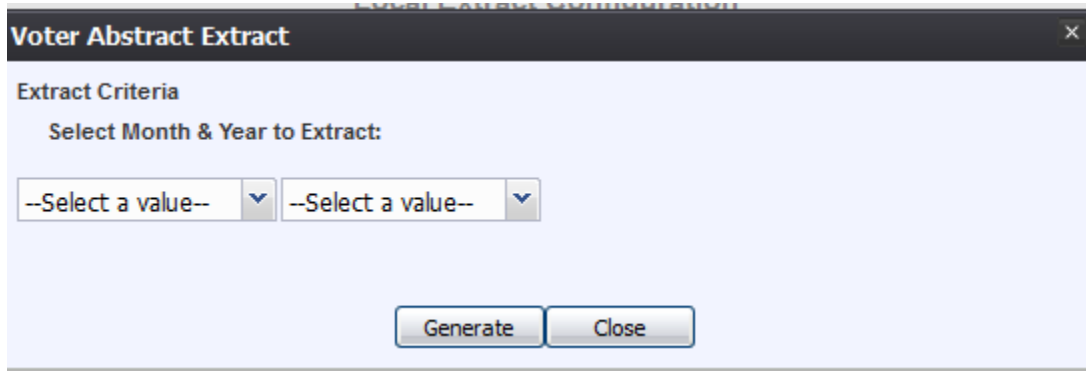
Figure 131: Local Extract Configuration Screen

3. Click the **Generate** button.

4. The application will issue a message that the extract has generated successfully.
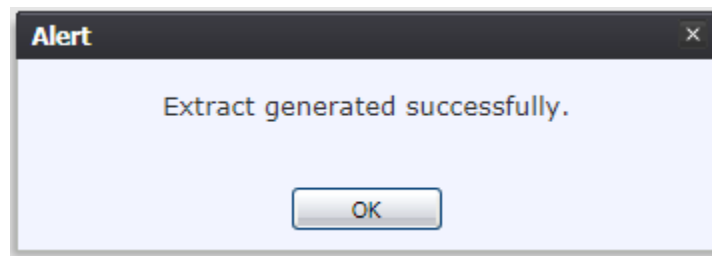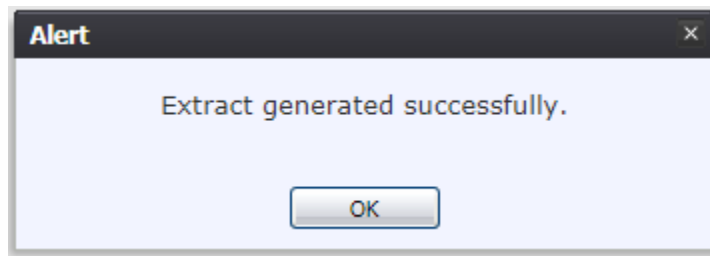

Figure 132: Extract Generated Successfully Message

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.
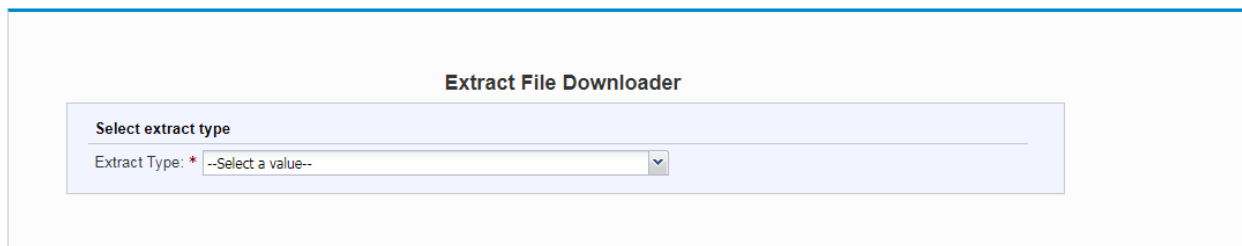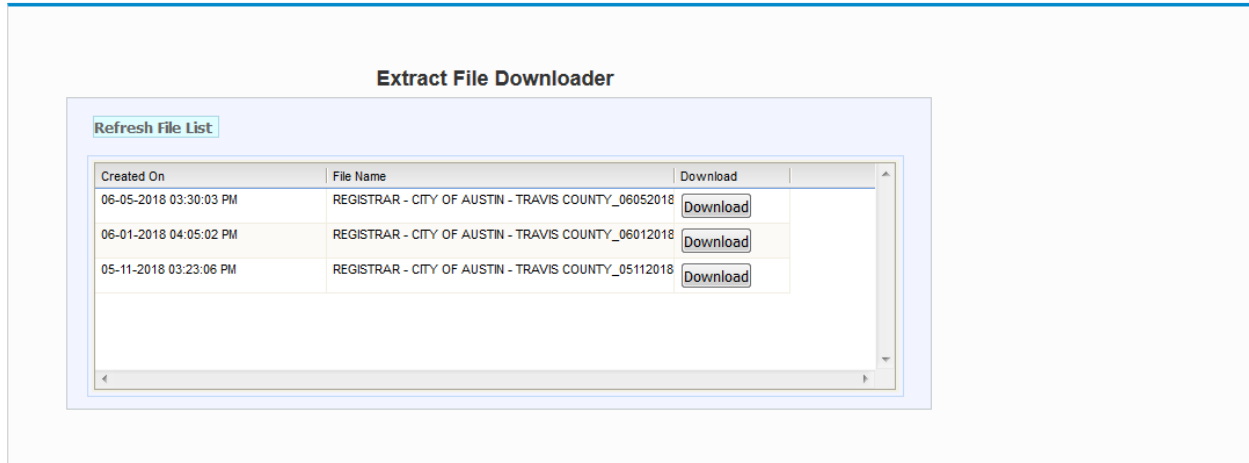
9 Reports

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

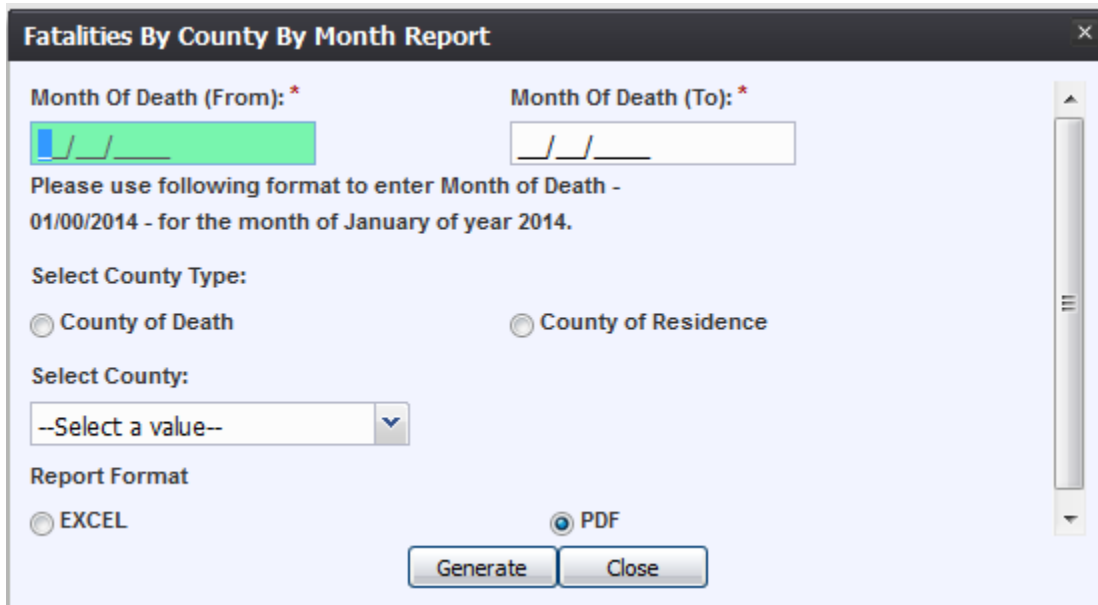1. From the Death Homepage, select the desired report from the Reports menu. A report options screen will appear:

Fatalities By County By Month Report   ×

Month Of Death (From): *   **Month Of Death (To):** *

Please use following format to enter Month of Death -
01/00/2014 - for the month of January of year 2014.

Select County Type:

○ County of Death   ○ County of Residence

Select County:

--Select a value--

Report Format

○ EXCEL   ◉ PDF

[Generate]   [Close]

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