# Quick Start Guide for Online Medical Certifiers and Online Support Staff

Vitals Information Partnership (VIP)

**Electronic Death Registration System (EDRS)** 

Revision July 1, 2014



MASSACHUSETTS REGISTRY OF VITAL RECORDS AND STATISTICS

# Notes

## Notes

Use this page to make notes about your own workflows and processes, which may differ by facility and practice.

#### **Summary of Steps**

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You may want to print this page as a quick reference sheet. Note that these steps represent typical scenarios, and your workflow may vary by facility or practice. While statute requires completion "immediately," a good guideline is to complete all information before or within 24 hours of death.

Create a Case (**Death→New Death→Create a Case**) or choose a partially-completed record from the work queue by clicking on **Process**.

*For medical data entry staff only:* first click on **tab 12** (Records Actions) and choose a certifier from the pick list. Then:

For all: Click on tab 6, then complete tabs 6 through 9.

Click **Finish**. Check that all medical items are complete on the VIPS Warning Page (except Certify). Use the [End] key to go to the bottom of the page and **Save as Pending**. This step is necessary to save the record and to perform a comprehensive validation edit.

On the Successful Transaction page, click **Return to Record**.

Review entries on tabs 6-9. Click on **tab 12**, check the **Ready to Certify** checkbox. Certifiers ready to certify may now click the **Certify** button. Medical data entry staff will not be able to click Certify, but will proceed to the next step.

Click **Finish**; press the [End] key to go to the bottom of the page and **Save as Pending**.

Repeat the process by clicking on Main Menu; or logout at the top right-hand corner of the VIP screen, then logout on the VG screen as well.

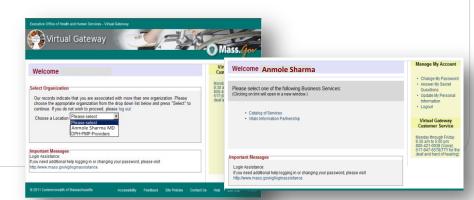
## **Accessing and Using EDRS**

The Electronic Death Registration System (EDRS) is a module of the larger Vitals Information Partnership (VIP) system that is hosted in the Commonwealth's secure Virtual Gateway (VG) environment. If you have not yet applied for and received a VG account, please go to <a href="https://www.mass.gov/dph/vip">www.mass.gov/dph/vip</a> to obtain enrollment information and forms.

*Access* EDRS on the web. EDRS can be accessed anywhere you have a computer and internet access. The system works best with the Microsoft Internet Explorer (IE) browser or with Firefox. If you are a

Mac user, it is recommended that you download the Firefox browser on your computer.

Log in at <u>http://mass.gov/vg</u>.

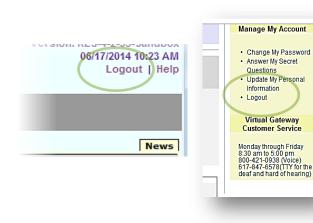


Questions? Contact the Registry at vip@state.ma.us or 617-740-2600

You must have a valid Commonwealth Virtual Gateway account, as well as a VIP account to log in to EDRS. If you have a VG account for another application, you will then have a choice of applications

when you log in. The VIP EDRS system will be contained under your name. Going forward any new VG applications that you enroll in will also be listed under your name, which is why the selection does not say "VIP EDRS."

*Logout* at the top right-hand corner of the VIP screen. To completely exit the system, also logout on the right-hand panel of the VG screen.



#### **Tips & Tricks**

**Save!** – EDRS will time out after 15 minutes. While your portion of the death record should take less than five minutes to enter, if you expect to be interrupted or if you are just learning the system, click "Finish," then "Save as Pending" frequently. You may then click "Return to Record" without risk of losing any information. EDRS does not save information automatically.

**No abbreviations** -- The system will prompt you if you use recognized abbreviations; you should spell out full medical terminology into each field. For example, on Tab 7\*\*Certifier Cause of Death, spell out "COPD" as "Chronic Obstructive Pulmonary Disease."



**Tab & Mouse** -- Use the Tab key on your computer keyboard to advance through each field in EDRS. You may also use your mouse to navigate tabs or to temporarily skip sections. Do <u>not</u> use Backspace or Enter, except <u>within</u> fields as necessary.

**Alerts** – Take advantage of system validation messages and warnings. Use the spell check icon on the Certifier Cause of Death tab. EDRS will help users get information in accurately and completely right from the start; this will save you from time-consuming corrections later.

**Color Coding** – White fields on each screen in EDRS will accept information; the yellow fields are disabled based on selections made in the system. A blue field indicates which field you are on now.

**Shortcuts** – EDRS accepts military time. Alt-T enters today's date. Colons are not necessary in Time fields and slashes are not necessary in date fields. Enter the first few letters of a selection on a picklist to narrow the list quickly. "Next" will move you from tab to tab, but you can click on the tab labels as well.

#### **Need Help?**

Contact the Registry at vip@state.ma.us or 617-740-2600

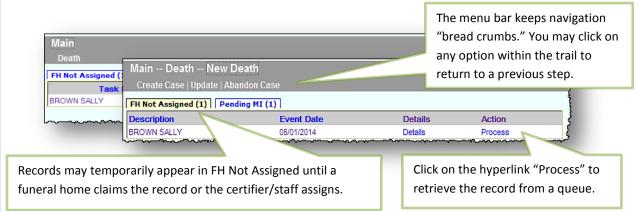
#### Navigation

How you navigate the EDRS will depend largely on your facility or practice workflow. Online certifiers may create new cases or complete cases that have been started and assigned to you by medical staff or funeral directors. *Note* - if the wrong certifier was assigned a medical staff person can reassign, or the funeral home/certifier that *started* the record can reassign.

EDRS has two general methods of navigation: work queues and a menu bar.

*Work queues* display records that are waiting for completion. For online medical certifiers, death records in a queue will usually be one of the following:

- Records that were started on the certifier's behalf (by medical staff or funeral directors);
- Records that the certifier started, but did not yet finish; or,
- Records that were returned for correction/modification. If you are an online certifier that creates new cases and certifies immediately, it is possible that you may never, or rarely, even see a queue.



*The gray menu bar* allows access to all authorized EDRS functions for the user type that is logged in. For online certifiers and staff, the most common options will be "Create Case," and "Print," which will allow for printing of the "Attestation Copy" that can be provided to funeral directors (or authorized designees) for transport.

The most common paths will be:

- Death→New Death→Create a Case (to start a new death record)
- Death→Print→Attestation Copy (to print a copy of the certified information for transport)
- Death→Search (to view all authorized death records)

Record Identifiers State file number Medical record number ABC1234 ME case year ME case unber	Date of Death Date of death (mm/ddyyyy) From To
Bar code number	Date of Birth Date of birth
Decedent's Name First Middle Search as AKA Soundex on last name	Occurrence of Death       Country       Of death       State       MASSACHUSETTS       City/fown       Ist
	list Select City Residence

## Create a New Case

The gray bar in VIP is a menu bar. Click on "Death" to access VIP menu options. To create a new case, click on Death, then New Death, then Create Case.

ended MI (1) Event Date
03/25/2014 03/27/2014
Sex, Date of Death and Date of
Enter dates as MMDDYYYY or MM/DD/YYYY. For most date field "9"s are acceptable for unknown portions. E.g., 03991961 indicates unknown day.

When you start a new record in EDRS, the system runs a check to see if the record may have been started by another user, such as a funeral director or medical data entry staff person. The system will then display potential matches.

• If no matching records are found, you can begin the process of establishing a new record by choosing **Create New Case**.

• If a potential match is found, you may choose to "Continue" if this is your case. If the match is a different decedent, then choose "Create New Case."

Depending on whether a match is found, these are examples of the two possible resulting screens:

					Record	s List (	0 Recor	ds foun	d )
ast Name				First Name	Date of Death	County of D	eath	Sex Funeral	Home
ere were no results that matched	l your search.								
Create New Case	Exi	t							
	Main I	Death Ne	w Death C	reate Case	-				
-				Record	ls List ( 1	L Recoi	ds fou	nd)	
	Last Name	First Name	Date of Death	County of Death	Sex Funeral Home	ICN Subm Re	a Action for FH	Action for MC	Action for MDE
	BROWN	SALLY	05/01/2014	MIDDLESEX	F	No 0	Accept	Continue	Owned by another Location
	Creat	e New Cas	e	Exit					

#### **Entering Medical Information**

All authorized users may view all information "tabs" in a death record, and you will be brought to Tab 1 initially. However, as a medical certifier, you are responsible only for **tabs 6 through 9** and relevant portions of **tab 12**. You may click directly on **tab 6** to begin. Your required tabs are:

	SALLY Last name:BROWN D		for tabs 6-9 & 12 only.
	ecedent Legal Info 3 Decedent Histor ** 7 **Certifier Cause of Death** 8		
Decedent's Name First name	SALLY	Date of Death Date of death (mm/dd/yyyy) 04/	01/2014

6 - Place/Date/Autopsy, 7 – Certifier Cause of Death, 8 – Manner/Detail/Injury, 9 – Certification Info, and 12 – Records Actions.

#### Medical Data Entry Staff

Some certifiers may have authorized medical data entry staff that will enter all or some of the information in these sections. However, as the certifying or attending practitioner, you are the only one that can "certify" the death. If you have staff members that enter information on your behalf, it is your responsibility to review <u>all</u> required tabs for accuracy and completeness, and make changes as necessary. For instance, the medical staff may not have known that an autopsy was performed at the time they entered the information, but the certifier may have newer information.

#### Tab 6. Place/Date/Autopsy

Name and date of birth and death are pre-populated from information you entered when you created the case. On this tab, you provide information about the place of death, whether the medical examiner was notified, and whether there was a private or M.E. autopsy. Medical record number is useful for reference.

Select a Place of Death option to enter the type of location where the death took place. Then, choose the specific facility from the drop-down list. For hospital and nursing home medical staff doing data entry, the facility name and address are defaulted.

- Not on the list? If the facility where the death took place is not listed in EDRS, you can use the option "Check if location is not in list" to enter in a new location.
- **Residence?** For a death occurring at the decedent's own residence, the address fields are all all open for editing. If medical staff or the funeral home entered information on tab 2, then you may check the "same as residence" checkbox to automatically populate residence address.
- Nursing Home/Assisted Living? If a decedent was living at a nursing home, assisted living or rest home, do not choose "decedent's residence," but choose the appropriate facility type instead. Look for facilities in other facility types, if not found on the pick list. What you may think to be a nursing home, may be licensed as assisted living.
- *Hospice*? If the decedent was receiving home hospice care in his/her own home, choose "decedent's residence." This category should only be used for hospice facilities.

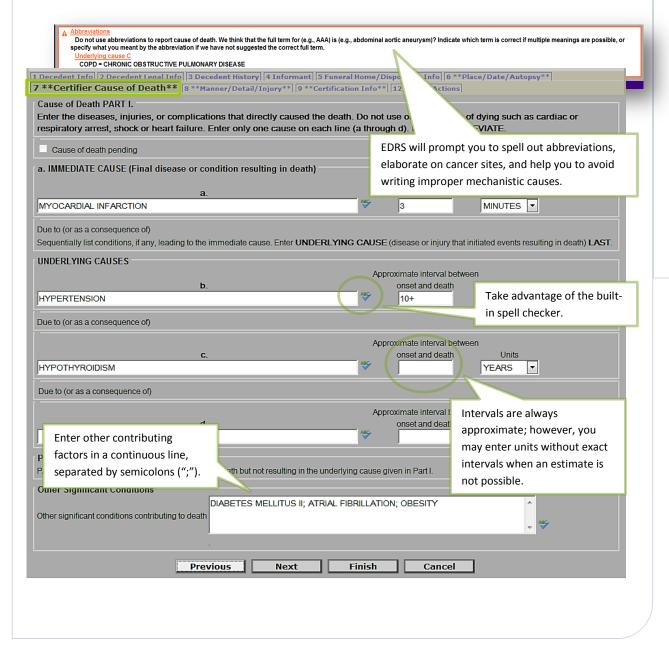
Certain selections in EDRS will cause other fields to become active. For example, if the decedent died in the hospital as an ER/Outpatient, a certifier will select the name of the hospital from the drop down list. EDRS lists hospitals, hospice care facilities, nursing homes, assisted living or rest homes, eliminating the need to type the name and address in most cases.

	3 Decedent History 4 Informant 5 Funera			Place/Date/Autopsy**			
	ner/Detail/Injury** 9 **Certification Info*						
Case Information		Place of Deat					
Decedent first name SAL	LY	Hospitals	Select				
Decedent middle name MAR	RIE	Hospices	Select	▼			
Decedent last name BRC	NMO	Nursing homes	Select				
Generational ID		Assisted living/ rest homes	IPSWICH ASS				
No middle name			ation is not in list				
Decedent sex FEN	MALE 💌		Address same as residence (Decedent Legal Info page)				
Decedent date of birth (mm/dd/yyyy) 04/0	01/1994	Facility name		ISTED LIVING FACILITY			
Check to release		Address	700				
Medical Record Info (if known)		number	789	Shortcut: Type the first few letters to quickly			
Medical record number 09999AE	BC123	Street prefix	Select 💌				
Medical examiner case year		Street name	MAIN	select an item from a drop-down list. E.g., "IPS"			
Medical examiner case number		Street	STREET	would quickly narrow the list to "Ipswich			
Place of Death	designator		Assisted Living Facility" in this example.				
Place of death ASSISTED LIVING FACI		Street suffix	Select -				
		Apt./unit number					
Specify other		Country	UNITED STAT	EC			
Autopsy Info		Country					
Was medical examiner contacted? Yes	Chasse "ather" who	n a nick		If you need to manually enter an address,			
Was an autopsy performed? Yes -	Private Choose "other" whe	•	Select 💌	note that each component of the address is			
Were autopsy findings available? Select	et 🖃 list item does not de	list item does not describe		separate so that geographic coding is more			
Actual Date of Death	the location. For son	neone		accurate. "Main Street South" is entered			
Date of death (mm/dd/yyyy) 04/01/2014	else's home, enter "	Other	Delect				
	residence" in the Sp		PSWICH	into three different fields.			

### Tab 7. Certifier Cause of Death

Using information from medical records, and other sources, provide in Part I the most complete sequence of events that describes the immediate cause of death entered in line (a) as a result of intermediate and underlying causes in lines (b) through (d). Approximate intervals between onset and death help to complete the Other significant conditions that contributed to death, but were not directly part of the sequence of events are reported in Part II.

Information that you provide is based on your best medical opinion. Medical researchers and families seeking family health histories rely on <u>your</u> thoroughness and detail. Online cause-of-death training is available for continuing medical education credit. Please email <u>vip@state.ma.us</u> for more information.



### Tab 8. Manner/Detail/Injury

Certifiers other than medical examiners will complete only three questions on this tab: **Manner of Death, Pregnancy status at time of death**, and **Did tobacco contribute to death?** The two new questions (about tobacco and pregnancy) are part of the national standard death certificate issued by the Centers for Disease Control and Prevention. The injury questions are completed only by a medical examiner.

*Manner*-- If the manner of death is not "Natural," <u>the medical examiner must take this case</u>. Choose "Natural" from the **Manner of Death** by clicking it in the drop down list or typing "N" in the field.

*Pregnancy Status--* In the Additional Death Details section, **Pregnancy status at time of death** must be answered if the decedent is female and within the ages of 5 and 75. The status options include pregnancies that may have been <u>up to one year</u> before death.

**Tobacco** -- Indicate whether tobacco use or tobacco exposure contributed to death. Even if you check this item "yes" or "probably," do not exclude tobacco use from causes of death or other significant conditions, if appropriate.

1 Decedent Info 2 Decedent Legal Info 2A Ve 9 **Certification Info** 12 Record Actions	eran Status   3 Decedent History   4 Informant   5 Funeral Home/Disposition Info   5A Pronouncement Info   6 **Place/Date/Autopsy**   7 **Certifier Cause of Death* ]	8 **Manner/Detail/Injury**
Manner of Death Manner of death Specify manner of death Additional Death Details Pregnancy status at time of death Not pregnancy status at time of t	ignator Select  Country Select	
Quick tip: Type Y, N or P to quickly populate the tobacco field.	Additional Death       Natural         Additional Death Natural          Additional Death Natural          Additional Death Details       Select         Pregnancy status at time of death       Select         Did tobacco contribute to death?       Select         Not pregnant within the past year       Pregnant at the time of death         Date of injury (mmldd/yyyy)       Not pregnant, but pregnant 43 days of 1 year before death         Time of injury       Select ()         Injury at work?       Select ()	Location Injury Occurred         Location unknown         Address number         Street prefix       Select         Street prefix       Select         Street designator       Select         Street suffix       Select         Apt/unit number       Country         State/province       Select         Zip code list       Select

#### Tab 9. Certification Info

Enter the **Certifier designation**. If you were the provider that pronounced death or were in attendance at the time of death, but were not part of the decedent's own health care team, select "Certifier in Attendance at Time of Death" (Physicians) or "Nurse Practitioner in Attendance at the Time of Death." Otherwise, choose either Physician or Nurse Practitioner in Charge of Patient's Care.

Death – First name: SALLY Last name: BROWN Date of death (mm/dd/yyyy): 04/01/2014 1 Decedent Info 2 Decedent Legal Info 2A Veteran Status 3 Decedent History 4 Informant 5 Funeral Home/Disposi 9 **Certification Info** 12 Record Actions					
Certifier Info					
Certifier designation	Select				
Physicians	Select				
	CERTIFIER IN ATTENDANCE AT TIME OF DEATH				
Medical examiners	MEDICAL EXAMINER				
Nurse practitioners	PHYSICIAN IN CHARGE OF PATIENT'S CARE				
	NURSE PRACTITIONER IN ATTENDANCE AT THE TIME OF PATIENT'S DEATH				
Certifier not in list	NURSE PRACTITIONER IN CHARGE OF PATIENT'S CARE				
Update Certifier Info	Update Certifier Info and flag for database change				
Title					

**Physician/ Nurse Practitioners** pick list. For online certifiers entering their own data, EDRS will autopopulate name, title, license number, phone and fax number, and address.

For medical data entry staff -- <u>First select a physician/ nurse practitioner certifier from tab</u> <u>12</u> (Records Actions), which will then populate that information on **tab 9**. If the Certifier is not on the list (or if the information is incorrect on the list) -- Mark the checkbox **Certifier** 

**not in list on <u>tab 12</u>**, which will enable the name and address fields for data entry.

If the updated information should be a permanent change to the pick list, also mark the checkbox **Update certifier info and flag for database change** on **tab 6**.

**Physician in charge of the patient's care** are fields that are enabled in most cases, <u>unless</u> the certifier designation is "Physician in Charge of Patient's Care" The name of the decedent's primary practitioner preceding death should be

Physician in C	harg	e of Patient's Ca	ire	
Physicians	Sele	ct	•	
Physician no		ct MS WILLIAM		
No primary of Title	ALI		Charge of Patient's	s Care
First name	DA	Physicians	Select	
Middle name	GC KR	Physician r	not in list	
Last name	SH	No primary	care physician provi	hah
Generational ID	VA	Title	Select 💌	Generational ID
		First name		is a last name
		Middle name		suffix. E.g., "Jr."
		Last name		
		Generational ID		

entered. If not on the pick list, then mark the checkbox **Physician not in list**. You may enter the physician's name and title (or Nurse Practitioner, if applicable). If the decedent had no primary practitioner preceding death, then mark the checkbox **No primary care physician provided**.

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#### For nurse practitioners that are

certifying death - their Associated Physician should be selected from the pick list when applicable, and the Type of association should be selected as either "Consulting" or "Supervisory." The physician may or may not be the same as the Physician in Charge of Patient's Care.

d	Nurse P	ractitioner-Physician Association				
-	Physician	s CARTER, JOHN C - 456789F				
ו	Associate physician	CARTER, JOHN C - 456789F				
	Type of association					
,						
are.						
AM or		Physician Certifying Info				
e not		Hour of death 01:00 Military 💌				
f death	is	Date signed Date verified AM				
	0.45	Midnight W				
-	n Certifyi					
Hour of de	eath 14:13					
Date sign	ate signed 05/13/2014 Date verified PM Unknown					

Hour of death may be entered as AM PM, or as military time. Colons are not needed (e.g., 1412). If the hour of dea

from 1300-2459, then the time designation is completed as military automatically. When entering 1200, select "Noon" or "Midnight."

Date signed should be entered as numeric. It will be converted to formal format when the record is registered and printed by the City/Town Clerk. Enter as MMDDYYYY or MM/DD/YYYY.

Finish and Save prior to Certifying on the Records Actions tab -- When all information is completed, you must Finish and Save the record before you can certify. Both steps are necessary before you may certify the record. (The VIP system needs to validate all screens before it determines that it is ready to certify.)

1. Click **Finish** at the bottom of the tab you are working on.



2. You will then see the VIPS Warning page, at the bottom of which you will click on the **Save** as Pending button. (See next page).

Next, you will be on the "Successful Transaction" page, where there is a button labeled **Return to Record** if you are ready to certify. (See next page).

#### **VIPS Warning Page**

This page contains a list of all fields that still need to be completed. Certifiers and medical staff do not need to complete any items other than those that appear in the **Medical Information** section.

	VIPS Warning				
The record you are This record is <u>not</u> ready to be certified, as the tobacco question is not complete. To return to the appropriate tab, click the field name. To save the record for later, click <b>Save as Pending</b> at the bottom of the page.					
Field Description: Indicate wheth	VIDO Werning				
Medical Info - Ready to certify Field Group Description: Ready	The record you are trying to save is UNFINISHED. All of the following fields are required for a FINISHED record.				
Certify Field Group Description: Medic	Medical Info - Ready to certify         certify,           Field Group Description: Ready to certify must be checked.         before these fields are enabled.				
Is decedent a US veteran?	PERSONAL and DISPOSITION INFORMATIGE. The remaining methods       Certifiers and medical staff are not required to answer any items other than the Medical Information items.         Is decedent a US veteran?       Field Description: *Required to print certificate. Indicate whet forces. If not known, select Unknown.				

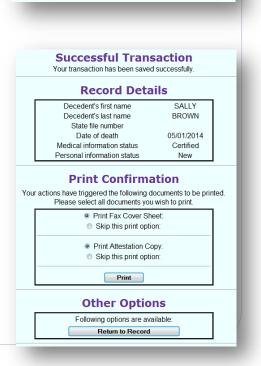
Record is not saved until you "Save as Pending" -- Note that a record is not yet saved until the Save as Pending button is clicked at the bottom of this page. To quickly skip the non-medical items, press the [End] button on your keyboard to skip to the bottom of the page. Save (as Pending)

To save a record click **Save as Pending** at the bottom of the VIPS Warning page.

#### **Successful Transaction Page**

After clicking **Save as Pending**, the Successful Transaction Page will allow for the printing of the **Fax Attestation Copy** once medical certification is complete. This form can be filed in medical records and provided to funeral directors (or family designees) for transport. (It is rare that certifiers will need to use the Fax Cover Sheet option unless attaching additional documents).

**Return to Record** brings the user back into the record tabs. This will most commonly be used when returning to click Ready to Certify and Certify on the Records Actions tab.



#### **Tab 12. Records Actions**

*For an online medical certifier* - <u>there are only two items required</u> on this tab to complete your certification: the **Ready to Certify** checkbox and the **Certify** button (active only when **tabs 6 through 9** are complete and the record has been previously finished and saved.) If the certifier has medical data entry staff completing information on his/her behalf, the certifier will simply review the information and click on the **Certify** button (the record will have already been saved and the **Ready to Certify** checkbox will already be marked). Then **Finish** and **Save (as Pending)**.

*Important note:* Certifiers should <u>never</u> select a certifying physician or nurse practitioner, as the online certifier information is already pre-populated. If a certifier selects a new certifier, or even him/herself, <u>all of the medical information will be reset to blank</u>. Leave as "Select."

*For the medical data entry staff member* that enters on behalf of the online certifier, two different actions must be taken: selecting a physician (which should occur near the beginning of the process – do not select the same certifier again at the end of the process) and checking "Ready to Certify." *Note* that once the certifier is selected, these fields will revert back to "select;" but do not select again unless you need to change the certifier that appears on **tab 9**.

Death – First name: SALLY Last name: BROWN Date of death (mm/dd/yyyy): 05/01/2014	
I Decedent Info       2 Decedent Hegal Info       3 Decedent History       4 Informant       5 Funeral Home/Disposition Info       6 **Place/Date/Autopsy**         7 **Certifier Cause of Death**       8 **Manner/Detail/Injury**       9 **Certification Info**       12 Record Actions         Comments Among Users About Case       Return Record       Return Record	
Medical Info     Cee       Select physician     Select <       Select facility     Select        Select nurse     Select	ata entry <u>staff</u> select the physician or NP that will certify the record. <u>ertifiers should never use this field</u> unless they are reassigning a case lse <b>tabs 6-9</b> will be reset to blank). Before selecting a certifier it is a bod idea to check that <b>tab 9</b> is not already complete, as the <b>Select</b> elds revert to and <u>should remain as</u> "Select" after leaving this page.
Select medical Select  Case access	History Record history 2014 User ID: 416 Started record Certify Certify Un-Certify Un-Certify Certification is enabled only after Finish and Save as Pending, then Return to Record.
funeral       Select         home       Check if funeral home is not in list         No designated funeral home       Case         access       Check when ready for review         Check when ready for review       Check if you decline to complete this record         Release       Release         Un-Release       Un-Release	Personal Info Select Nome Select Nome Select Nome Select CHAPMAN, COLE & GLEASON FUNERAL HOMES FALMOUTH DF CHAPMAN, COLE & GLEASON FUNERAL HOMES MILTON DP - M If 100 percent certain, certifiers or medical staff may optionally assign the funeral home. This will cause the record to appear on the funeral home's "to do" queue in EDRS. Do not select if you are not completely sure.

*Funeral Home Info* – It is recommended that certifiers and medical staff <u>do not choose a funeral</u> <u>home</u>, unless they are 100 certain of the funeral home that will handle the decedent. If incorrect, you will be called upon to reassign the funeral home, as the new funeral home will not have access.