

# Transforming the Massachusetts Death Certificate Process

#### Vitals Information Partnership (V.I.P.)

#### EDRS Overview Webinar for Burial Agents

#### July 2014

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### Handouts

- Sample Forms
- Clerk Enrollment Matrix
- Board of Health Enrollment Matrix
- Burial Agent Designation form
- Burial Agent Opt-in form
- Opt-in and ePermit factsheet
- Preparation for EDRS Handout
- Posters and Brochures
- Funeral Homes with accounts list

#### Agenda

- Overview of Changes to the Process
- Enrollment Requirements
- Forms
- Demonstration
- Next Steps
- Questions



## **Changes to Process**

- Secure, online processing enabled No paper submissions to Burial Agents!
- New fields and data rules comply with federal guidelines
- The online workflow is similar to the current paper process
- If a member of the Board of Health is not the primary burial agent for the municipality, the Board must designate the burial agent in writing
- Initial disposition must be captured electronically for the death certificate. Subsequent dispositions (after the record is registered) will be captured outside the EDRS
  - Fillable PDF
  - Current paper booklets
  - A planned, future enhancement



## **Changes to Death Certificate**

- Death Certificate Changes coming September 1, 2014 to comply with 2003 federal standards
  - Three new data items added in medical portion of death certificate:
    - Pregnancy status at time of death
    - Transportation injury question
    - Tobacco question
  - New forms take the place of current paper death certificate and Disposition Permit
  - Certifiers will complete death records online or by a worksheet/attestation method.

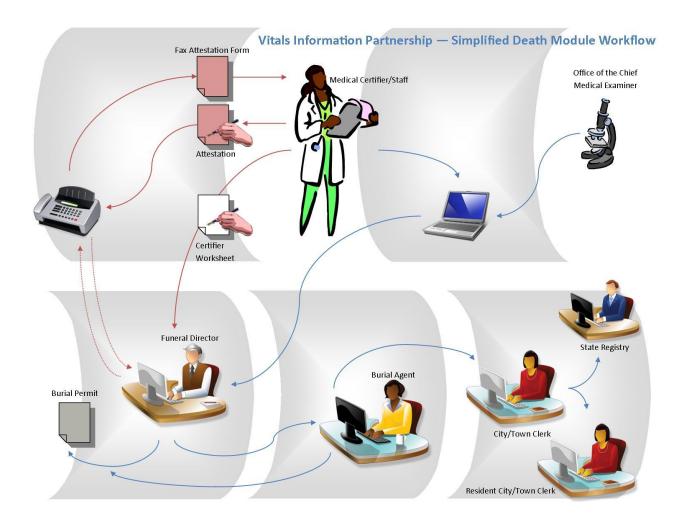


## **Changes to Process Workflow**

- Death records will be processed electronically and 'made available' to the next person in the process instead of providing the paper in person
- Electronic processing includes a number of validation checks such as the date of death cannot be before the date of birth, additional age checking, and required fields are completed
- Burial Agents will find records that require registration in your online 'To Do' list, called a work queue
- The EDRS will allow you to review the record, issue the permit when you are ready (possibly dependent on payment of fees) and release the record to the clerk for registration.



### **EDRS Simplified Workflow**





## **Changes to Process - Permits**

- Funeral Directors will be able to print the permit from their offices when the permit is ready to print
- The Burial Agent determines when the permit is ready to print. The permit is ready to print when the date issued and permit number have been assigned
- The EDRS will offer communities an option for printing burial permits to support the different permit printing needs
  - If the community "opts-in" to this option, funeral directors will be able to print an 'ePermit' from EDRS as soon as the record is completed and released to the burial agent for review
  - If the community "opts-out", funeral directors will be able to print the permit from EDRS as soon as the burial agent has entered the date issues, permit number, and assigned a burial agent to the record

# **Changes to Process - Permits**

- With either option, the system requires the burial agent to review the record and issue the permit number before releasing the record to the clerk for registration
  - E-permits issued prior to review will contain a state tracking number only; those issued after review will also contain a local permit number
  - If you Opt-in, ePermits can be printed at any time , during business hours and outside business hours
- Permits can be printed from the EDRS by either the burial agent or the funeral director.
  - Except in rare cases, funeral directors will not need to drive to the burial agent to obtain the permit
  - Outside business hours issuance may occur using the EDRS <u>if the burial</u> agent designees have accounts, or if the community "opts-in"
    - Otherwise, outside business hours issuance may occur on paper and be entered into the system on the next day
    - The timing of issuance and release for registration is at the discretion of the burial agent
    - If you plan to issue permits outside business hours on paper, your designees will review an attestation copy form or informant verification form



# **Simplified EDRS Process**

Burial Complete Agent Certifier remaining Starts the information • Find in Death • Fax in Record Queue • Review evidence Review Able to Review medical record Release to send for record sections Burial • Enter medical of the • Register Agent permit info certification death • Print online or • (If Town of • (If Town of record archival by fax death =death = and • Certify OPT-IN, OPT-OUT, Medical certified online or Can Print Can Print by fax copies Data Entry DP) DP) Staff or Clerk Release for Funeral Funeral registration to Clerk Staff Director

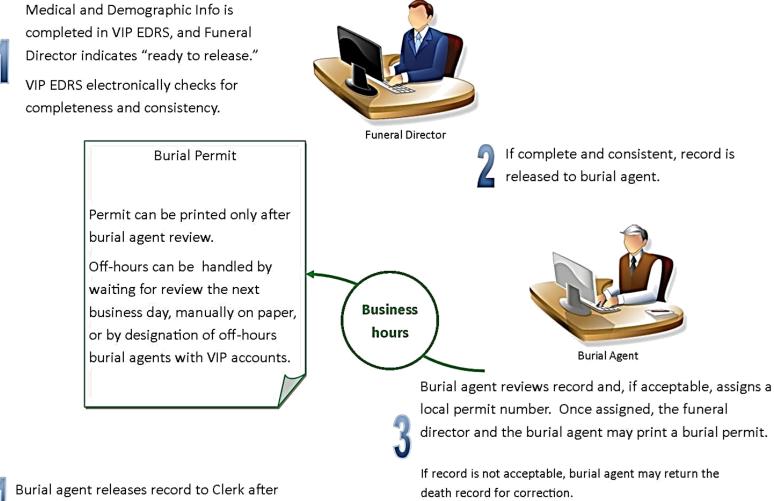
Records are '**sent**' in the system to the users who will perform the next action on the record, such as registration using work queues or To Do Lists.

Registry of Vital Records and Statistics, Massachusetts Department of Public Health



#### Immediate Disposition (Burial) Permit Options

#### in the VIP Electronic Death Registration System (EDRS): "Opt-Out"



review (and payment, if applicable).

#### Immediate Disposition (Burial) Permit Options in the VIP Electronic Death Registration System (EDRS): **"Opt-In"**

**Funeral Director** 

24/7

Medical and Demographic Info is completed in VIP EDRS, and Funeral Director indicates "ready to release."

VIP EDRS electronically checks for completeness and consistency.

#### **Burial Permit**

If printed prior to local permit number, the permit displays only the state tracking number and the designation "e-permit."

If printed after local permit number, the permit will contain the local permit number as well.

Burial agent releases record to Clerk after review (and payment, if applicable). If complete and consistent, record is released to burial agent and the funeral director may print a burial permit immediately and 24/7.

Burial Agent

Burial agent reviews record and, if acceptable, assigns a local permit number, which may be before *or after* the funeral director prints the permit. Burial agent may also print the permit.

If record is not acceptable, burial agent may return the death record for correction. This will not prevent a funeral director from using a permit already printed.

### **Permit Payment Questions**

- The VIP will not have an integrated electronic payment option
- The method for collecting fees, if any, is up to the City/Town
  - Jim Imprescia, Manager of the Boston Public Health Commission's Burial Permit Office, has been working with the State Comptroller's Office and Hewlett Packard to support the credit card and debit account payment processing for burial permits outside of EDRS
  - Cities and towns can use the state blanket contract to implement this system at no cost. The vendor will assess a small transaction fee for each payment
  - Jim would be happy to offer a demo for those interested and discuss what is involved in getting it set-up for your city or town
  - Email Jim Imprescia at <u>JImprescia@bphc.org</u>



### Permit Printing and Payment Options

The strategies used are the jurisdiction of the municipality, but these suggestions may be considered

- Possible Outside Business Hours Printing Strategies -- Opt-In
  - All Funeral Directors can print ePermits as soon as record released to burial agent
  - Burial Agent reviews record on next available business day
  - If fees are collected, use one of the below strategies or another payment strategy
- Possible Outside Business Hours Printing Strategies Opt-Out
  - Online: Designate additional burial agents for the municipality who will be available in the off hours
  - Offline: Use current outside business hours permitting strategy i.e., paper booklets and enter the information into the EDRS on the next available business day
  - There will be no paper death certificate to review. What would you require?

#### • Possible Payment Collection we have heard about include:

- Online: Work with Boston to use the online payment strategy or set up a PayPal account for online payments
- Offline: Use prepaid vouchers; invoice monthly or per record; charge at the clerk's office when obtaining certified copies
- Withhold record from registration until payment is processed



#### **Burial Agent Users in VIP**

- The agent in charge of issuing burial permits in your municipality, will need a VIP account
  - This is often either the Board of Health or the City/Town Clerk
  - This is the name printed on the Burial Permit and Death Certificate
- Office staff and other designated issuers should also have accounts
  - There is only one role for a burial agent on the URF
  - This means all burial agent users will have the same access to functionality in VIP
- Permit issuance must be considered
  - All who will issue online, will need an individual user account
  - Please designate at least two, if not more, individuals with burial agent privileges (vacations, absences, off-hours)
  - Accounts cannot be shared!



#### **Enrollment VG/VIP Agreements**

There are four different agreements: 3 paper, 1 electronic (There are some variations depending on whether the Board of Health staff are burial agents and/or the City/Town Clerk.)

- PAPER:
  - Submit the original, signed paper for the VG Services Agreement, Access Administrator form and VIP User Confidentiality Agreement
  - Mail the signed paper forms to the address below which is different from the address on the forms

Registry of Vital Records and Statistics ATTN: VIP Team 150 Mt. Vernon Street, 1<sup>st</sup> Floor Boston, MA 02125-3105

- ELECTRONIC:
  - The Access Administrator submits the URF by email
  - Email the electronic form to <u>vip@state.ma.us</u>
  - Complete processing time for user accounts is 3 4 weeks



#### **Required Agreements**

- If the Clerk or another party is the primary Burial Agent
  - Submit a letter designating the clerk as the primary burial agent for the city or town from the Board of Health
  - The clerk or other designated party will then manage EDRS user accounts and access
  - The Clerk will also submit a Sub Org form to assign a "Burial Agent" role to their existing City/Town Clerk organization



#### Required Agreements cont.

- If the Board of Health is the primary Burial Agent and does not have a VG Account Already
  - Submit a VG Services Agreement
  - Submit an Access Administrator form
  - Submit VIP User Agreements for those who will issue electronic permits
  - Submit a URF requesting desired staff as burial agent users. In addition, you may also request existing users such as the clerk and/or funeral directors be granted burial agent roles, if desired.
  - If enrollment forms are not received in time to obtain accounts, the clerk will be given EDRS burial agent privileges until the BOH account is created



#### Required Agreements, cont.

- If the Board of Health is the primary Burial Agent and does have a VG Account
  - Submit an Access Administrator Form, if you want an additional access administrator
  - Submit VIP User Agreements for those who do not have user accounts
  - Submit a URF requesting desired staff as burial agent users. In addition, you may also request existing users such as the clerk and/or funeral directors be granted burial agent roles, if desired.



#### **Top 4 Questions**

- How do I know if the Board of Health or I should submit the VG Services Agreement forms?
  - The Board of Health should submit the form in most cases
  - If the Board of Health does not issue burial permits and has designated that function to the clerk, then the clerk should submit the VG paperwork (but a designation form is necessary)
- How do I receive payment for fees with the new system?
  - How you incorporate the collection of fees is up to each municipality.
  - We encourage you to make an option available that will allow for processing of payments, if necessary, that will reduce or eliminate trips to the burial agent office for issuing the permit



# Top 4 Questions, cont.

- What is the training plan for Burial Agents?
  - New User orientation sessions currently available bi-weekly
  - Webinar practice sessions in the sandbox environment starting in April
  - eLearning Modules under development
    - Reviewer volunteers?
  - Training Documentation
- Will there be a blank, burial permit for use in an emergency?
  - Yes, fillable PDFs will be available for secondary disposition permits or as part of the contingency plan for unplanned VIP system downtime
  - Blank permits will be available for emergency use



### **Quick Demonstration**

- Issue Burial Permit
- Release for registration
- Print Permit: Opt-in versus Opt-Out



#### **Issue a Burial Permit**

- Review record
- Enter Date Issued
- Enter Permit Number
- Enter Additional Comments, if desired
- Release the record to the clerk for registration



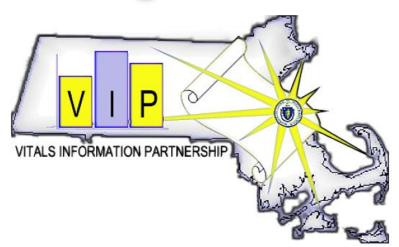
#### Welcome Page



Commonwealth of Massachusetts Executive Office of Health and Human Services Department of Public Health

Contact: Registry of Vital Records and Statistics 150 Mt. Vernon Street, 1st Floor Dorchester, MA 02125 VIPProjectTeam@MassMail.state.ma.us (617) 740-2600



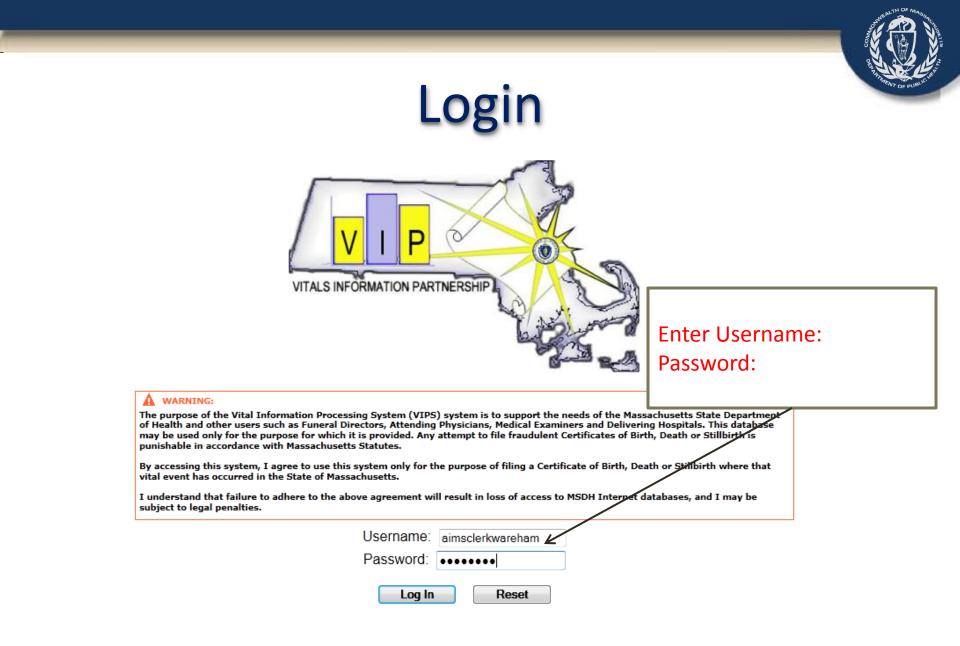


#### VITAL INFORMATION PROCESSING SYSTEM

The Vitals Information Partnership system supports the Massachusetts Registry of Vital Records and Statistics (RVRS) and statewide vital records partners and users. This system is intended only for authorized RVRS partners such as city and town clerks, funeral directors, physicians, hospitals, medical examiners and others with the express permission of the Registrar of Vital Records and Statistics and the Commissioner of Public Health.

By accessing this system, users agree to comply with all laws and regulations regarding the registration, filing, issuance and reporting of vital records and statistics information.

LOGIN





#### **Death Menu Options**

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Certifier Info Certifier designation: PHYSICIAN IN CHA Certifier not in list: N Title: 1 First name: JOHN Middle name: C Last name: CARTER Generational ID: Phone number: 617-740-2711 Fax number: 617-740-2711 Medical license number: 456789 Case access: FAX SERVER Check if signed on behalf of certifier: N	signed and dated Attes page	RVER, then you should be able to find a station form as evidence at the bottom of the go to the editable record
Signed on behalf of by: Certifier license number - general category: <b>4567</b> NPI number: Location ID of owner of medical section: <b>2349</b> Location ID of physician who updated record:	89	Hour of death: 15:15 : M Date signed: 03/20/2014 Date verified: User ID of medical certifier who signed:
Physician in Charge of Patient's Care Physician not in list: N No primary care physician provided: N Title: 1		Nurse Practitioner-Physician Association Associated physician: Associated physician loc ID: Type of association:
First name: JOHN Middle name: C	1	System Info Flag to copy certifier info: Y

July 2014

Registry of Vital Records and Statistics, Massachusetts Department of Public Health



#### Select a Record

http://www.dou.obs.etate.com.com	rnet Explorer		of the second second	-	and the second					
Thup://wips-dev.ens.state.ma.us:80	80/vips/servlet/dse/process	5								
gged in as: lartin Nathanson : WAREHAM BURIAL AGENT nit: WAREHAM BURIAL AGENT										ersion: RLS-4- 3/21/2014 08:58 Logout   1
/lain Death New Death	Update									
			Record	ds Lis	t ( 3 Records found )					
st Name First Name	Date of Death	County of Death	Date of Birth	Sex	Funeral Home	PI Status	MI Status	Reg Status	Version	Details
NDAY JAMES	01/01/2013	PLYMOUTH	01/01/1960	M	WHITTIER-PORTER FUNERAL HOME	Complete	Certified	Released f	0	<b>Setails</b>
SPICE JONATHAN SEY JAMES	02/02/2013 02/02/2014	PLYMOUTH PLYMOUTH	01/01/1960	M	WHITTIER-PORTER FUNERAL HOME WHITTIER-PORTER FUNERAL HOME	Complete	Certified Certified	Released f	0	Details Details
0,000	020212011		0110111000			Complete	Continou	Turuu		C O COMO
					Cancel					
				$\succ$	Brings you to Red Look for attached and Fax attestation	d eviden	ce: Pr	<b>U</b>	ceme	ents



#### **Issue a Burial Permit**

🧭 VIPS - Dynamic Screen Engine - Windows Internet Explorer	
Http://vips-dev.ehs. <b>state.ma.us</b> :8080/vips/servlet/dse/process	
Death First name: JAMES Last name: KASEY Date of death (mm/dd/yyyy): 02/02/2014	· · · · · · · · · · · · · · · · · · ·
1 Decedent Info  2 Decedent Legal Info  2A Veteran Status  3 Decedent History  4 Informant  5 Funeral Home/Disposi 10 Board of Health/Burial Agent  12 Record Actions  - Burial Permit Info	tion Info 6 **Place/Date/Autopsy**) 7 **Certifier Cause of Death**) 8 **Manner/Detail/Injury**) 9 **Certification Info**)
No permit issued	
Date burial permit issued 03/21/2014	
Burial permit number 14-000178	
Additional permit mormation	Enter Date Issued
Date issued (RVRS)         03/20/2014           State tracking number         000178	Enter Permit Number: you can enter the year
Burial Agent Info       Burial agent list       JAMES       First name       JAMES       Middle name       M	<ul> <li>and the State Tracking number if you want a unique permit number</li> <li>Select the Burial Agent</li> <li>When you save the record the permit is issued and can be printed</li> </ul>
	Note: the No Permit Issued Checkbox is used for those rare cases where the decedent was buried or cremated before the permit was issued. This is not for those who use an ePermit.

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#### **Release for Registration**

VIPS - Dynamic Screen Engine - Windows Internet Explorer	
(2) http://vips-dev.ehs.state.ma.us.8080/vips/servlet/dse/process	
Death First name: JAMES Last name: KASEY Date of death (mm/dd/yyyy): 02/02/2014	
1 Decedent Info 2 Decedent Legal Info 2A Veteran Status 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**	
10 Board of Health/Burial Agent   12 Record Actions Comments Among Users About Case	Return Record
	Check if you need to return this record
	New Comments
Comments	
• • • • • • • • • • • • • • • • • • •	· · · · · · · · · · · · · · · · · · ·
Medical Info	Check when new comments are complete
Select physician Select	Return Record Info
Select facility physician Select -	Baseon for returning record
Select nurse practitioner Select	
Select medical examiner Select	
Check if physician/medical examiner is not in list	
Case access	
Check when ready to certify Check if you decline to certify	Click on the Record Actions Tab heading
Certify Certify Un-Certify	> The clork cannot register the record and issue
Personal Info	The clerk cannot register the record and issue
Select funeral home Select	certified copies until you release the record
Check if funeral home is not in list	certified copies until you release the record
No designated funeral home	for registration!
Case access	
Check when ready for review before releasing Check if you decline to complete this record	
Release Release Un-Release	Nouthe Descul Asticus Tab. slick su the
Release for Registration	On the Record Actions Tab, click on the
Release Release Un-Release	DELEACE button to valages the vegetal to the
Verification Form Info	RELEASE button to release the record to the
Informant date	clark of accurrance
No verification form	clerk of occurrence.

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### **Questions for VIP?**

- Email any question to the VIP Project Team mailbox: <u>vip@state.ma.us</u>
- Ask for a return call if you need to talk to someone
- Check our Website at

http://www.mass.gov/dph/vip

 You will find an Introduction and Overview to the EDRS as well as instructions on how to fill out the forms in the Enrollment Guide for Clerks and Burial Agents



### Your Next Steps

- Join our Listserv:
  - Send an email to:
  - Subscribe-dph\_rvrsboh@listserv.state.ma.us
  - The subject of the email should be Subscribe
  - Provide your name, title, telephone
  - We will email informational updates, copies of future presentations, sample VIP EDRS forms, and future training opportunities to listserv subscribers.
- Review your current staff and VIP Accounts. Ensure all who need accounts for deaths have them
- Submit VG Agreements and URFs for you
- Refer all partners to us to discuss the system
- Attend webinar practice sessions (schedule on website)



## More information?

 More information about account creation and other training material is available on the Registry's VIP web page:

www.mass.gov/dph/vip

- Updated information and training resources will be added as they become available.
- Please feel free to email the VIP Project Team with any questions or comments:

vip@state.ma.us