Vitals Information Partnership (VIP):
Electronic Death Registration System (EDRS)

EDRS Overview and User Account Enrollment - Medical Certifiers
July 2014 - Massachusetts Registry of Vital Records and Statistics
Agenda

- Introduction
- Changes to Death Certificate & Process
- Medical community options for certifying death certificates
- Preparation Steps
- Getting Started, VIP Account Creation
- Project Status
- Training and System Requirements
- Questions
Meeting Guidelines

- Use the *6 to mute your telephone during the presentation
- Use the *6 to unmute your telephone during the presentation
- Avoid putting the meeting on hold as different systems may play music or beep
- This is an initial overview for the EDRS. We will have more in depth training sessions and materials available in the coming months
How to Submit Questions

- There are too many attendees for verbal questions
- You can type questions and submit them using the Question feature.
- We will try to answer all questions, if there is time, but may have to email answers after the session.
- Copies of the presentation and Q&A will be sent to attendees.
Changes to Process

- Secure, online processing enabled
- Two methods for Death Records to be certified:
  - Medical certifiers may certify records online with a user account
  - Medical certifiers may certify death records by fax referred to as fax attestation without a user account
- The online workflow is similar to the current paper process
- New fields and data rules comply with federal guidelines
Changes to Death Certificate

- Death Certificate Changes coming on September 1, 2014 to comply with 2003 federal standards
  - Three new data items were added in medical portion of death certificate:
    - Pregnancy status at time of death
    - Transportation injury question
    - Tobacco question
- New forms were created to support the new process
  - Online users will certify and may print a copy of the certified medical info
  - Other certifiers will fill out a Death Certificate Certifier Worksheet and provide to either medical data entry staff or the funeral director
  - Certifiers will review and sign an Attestation Form, attesting to the fact that the data was entered accurately
- Most medical certifiers will fill out Death Certificate Certifier Worksheets instead of their portion of the paper death certificates, unless they have an account
- New Death Certificate Training is under development
Medical Community Options

How can physicians certify death records?
- Online, physicians will need accounts
- Offline, Fax Attestation, physicians will sign a paper attestation after data entry by another party and fax in to VIP, no physician user accounts needed

How can medical staff prepare death records?
- Online: Data entry by physician staff in the EDRS can support both online and offline certifiers
- Offline: Fill out a Death Certificate Certifier Worksheet for funeral home to transport decedent

Combination of above options are available to meet your office structure

Contact the VIP Project Team to discuss
Staff Online and Certifier Offline

EDRS — Private Practice Staff Online: Certifier Not Online

1. Print or fax Attestation Form to medical certifier.
2. Certifier or staff faxes into EDRS.
3. Medical certifier without EDRS Account.
4. Print or fax Attestation Copy form for transportation of the decedent and medical records.

Forms Needed:
1. VG Services Agreement per Certifier.
2. Access Administrator Form per Certifier.
3. VIP User Agreement per user.
4. User Request Form per certifier listing all new users for the certifier.

Staff Forms Needed:
1. VIP User Agreement per User.
2. Add this user to the User Request Form for the Certifier above.

Practice Staff EDRS Users contained in this box.

Printed or faxed Attestation Form

Certifier Worksheet is provided to facility staff for data entry into EDRS.

Hospital Staff with Medical Data Entry Role

EDRS Facility Workflow: Hospital Staff Online / Certifier Not Online

Medical Certifiers EDRS Users contained in this box.

Print or fax EDRS Attestation Form to medical certifier.

Certifier signs Attestation (or corrects if necessary).

Certifier or staff fax signed Attestation Form into EDRS.

Attestation Copy form may be printed for transportation of the decedent and medical records.
Staff Online and Certifier Offline

- Create a New Death Record
- Enter Medical Information
- Print or Fax Attestation to Certifier

Certifier
- Complete form
- Sign

Send via Fax to VIP
- Complete data entry
- Print Attestation Copies

Staff

Funeral Director
- Complete Decedent Record
- Release to Burial Agent

Staff

Burial Agent
- Verify record
- Enter Burial Permit info
- Release for registration
- Print Permit

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Staff Online – Certifier Online

EDRS — Private Practice Staff Online: Certifier Online

Certifier Forms Needed:
1. VG Services Agreement per certifier
2. Access Administrator Form, per certifier
3. VIP User Agreement
4. User Request Form per certifier listing all new users for the certifier

Staff Forms Needed:
1. VIP User Agreement per User
Add this user to the User Request Form for the Certifier above

Medical data Entry Role creates the record and assigns to medical certifier

Electronically certified Record

Medical Certifiers EDRS Users contained in this box

Prints Attestation Copy form for transportation of the decedent and medical records

Practice Staff EDRS Users contained in this box

Staff with Medical Data Entry Role Starts Record
Staff Online – Certifier Online

- Create a New Death Record
- Enter Medical Information
- Indicate record is Ready for Certification

Certifier

- Review record
- Certify
- Print Attestation Copy
- Complete Decedent Record
- Release to Burial Agent

Funeral Director

Burial Agent

- Verify record
- Enter Burial Permit info
- Release for registration
- Print Permit
Certifier offline—paper to Funeral Director

- Fill out Death Certificate Certifier Worksheet
- Provide to Funeral Home

Certifier

- Obtain Certifier Worksheet from certifier
- Create a New Death Record
- Enter Medical Information
- Fax Attestation to Certifier

Funeral Director

- Review form
- Sign
- Fax to VIP

Certifier

- Confirm Attestation Signed
- Enter remaining information
- Fax in evidence
- Release for permit
- Then continues...

Funeral Director

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Offline Staff - Certifiers Both Online & Offline

Non-Participating Facility Workflow: Facility Staff Not Online / Some Certifiers Online, Others Not Online

1. Certifier Worksheet is provided to funeral director for data entry. This form may also be used to remove the body.

2. Funeral Director faxes EDRS Attestation Form to medical certifier.

3. Certifier signs Attestation (or corrects if necessary)

4. Certifier or staff fax signed Attestation Form into EDRS

Facility staff do not view, edit or print information from EDRS

Medical Certifier Online

Certifier enters information and certifies electronically in EDRS.

Funeral Director

Certifier starts record and assigns to medical certifier (or certifier may start the record directly)

Medical Certifier

Online Certifier Enrollment Forms:
1. VGI Services Agreement per certifier
2. Access Administrator Form, per certifier
3. VGI User Agreement per certifier and any certifier-only staff
4. User Request Form per certifier listing all new users for specific to the certifier
EDRS Account Roles

- Each user assigned one role by access administrator
  - If certifiers will start and contribute to death records but not certify them, they may need both roles

- Medical Data Entry Group
  - Any person who contributes to the electronic death certificate, but is not the certifier
  - Creates records
  - Edits records
  - Assigns certifiers
  - May fax and print attestation forms
  - Records created by this role will be visible to all online hospital staff

- Medical Certifier Group
  - Physicians, MEs or NPs
  - Creates records
  - Edits records
  - Certifies medical information on death certificate online
  - Records created by this role will be visible to the certifier and personal staff
Preparation Steps for EDRS

- Learn about the coming changes
- Determine how your organization would like to comply with the new process
- Request and Submit Account Request Forms if you want to use the system for data entry or online certification
- Training is available and will increase as the year progresses
- Prepare your staff to use the system before it is required
- The electronic system is scheduled to be implemented on **September 1, 2014**
VG/VIP Agreements

- There are four different agreements: 3 paper, 1 electronic
- Request agreements at vip@state.ma.us
- 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 Enrollment Forms
  150 Mt. Vernon Street, 1st Floor
  Boston, MA  02125-3105
- Forms are pre-processed at RVRS for completeness
- Email the electronic form to vip@state.ma.us
- Complete processing time for user accounts is 3 - 4 weeks
  - Medical Data Entry Staff accounts will be created just before we go live
- Use the sample forms as a reference for the information needed
Specific Forms Requirements

- If you have medical data entry staff who will create, monitor or print medical records online, you will need to fill out:
  - One VG Services Agreement for each certifier in a practice
  - One Access Administrator for each certifier in a practice
  - A VIP User Agreement for each user of the system (one time for each staff user)
  - One User Request Form (for each certifier in the practice listing all medical data entry staff that will perform data entry for each)

- If your physicians or NPs will certify via attestation form (on paper), no additional accounts for certifiers are needed

- EDRS Process supported:
  - Data entry staff will create the death record online
  - Physicians or certifying NPs will sign the attestation form
  - The forms will be faxed to the VIP system
Specific Forms Requirements

- If you have or are a physician or NP who will certify online, you will need to fill out
  - One VG Services Agreement for each certifier in a practice
  - One Access Administrator for each certifier in a practice
  - A VIP User Agreement for each user of the system (one time for each staff user)
  - One User Request Form (for each certifier in the practice listing all medical data entry staff that will perform data entry for each)
  - Physicians and certifying NPs are treated as an organization in our enrollment process, they must complete all forms as if they are an organization
  - If you already use applications in the Virtual Gateway, you will still complete these forms. Additional permissions should be added to your existing account

- EDRS Process supported:
  - Data entry staff will create the death record online and assign to physician
  - Physicians or certifying NPs will fill in the Date Signed and Certify the record
  - Upon save, the record is certified
Creation of User Accounts

Two step process for account creation

- Step 1. Creation of an AIMS Account to go through the Virtual Gateway (VG)
  - When AIMS account is created, email sent to user from the Virtual Gateway team
  - User should change the temporary password on the Virtual Gateway within 7 days of receipt of email
  - Contact the Virtual Gateway customer service team with issues related to passwords at 800-421-0938, M-F 9AM-5PM
  - You will not be able to access VIP, until step 2 has been completed
Creation of User Accounts

- Step 2. Creation of VIP Account to access EDRS
  - Each user will receive an email from the VIP Project team when the VIP account has been created
  - Training documents and training information will be sent to each user at that time
  - Medical Data Entry Staff accounts will be created just before we go live as they were added as an enhancement
  - All will receive info on logging into the sandbox practice environment next month

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Project Status – Where Are We

- Version 4.2 In performance testing for an **September 1, 2014** implementation

- Data entry staff and online medical certifiers need accounts before using the system
  - Medical certifiers and staff without VIP accounts will be using the certifier worksheet and fax attestation process

- Office of Chief Medical Examiner staff members are in training and will be online users

- External Working Group active in designing the system since October 2011
Training

- We will use a new training environment, the Sandbox, for all training. Instructions for accessing the practice environment are available upon request, links will be provided on our website, or attend a webinar to receive materials.

- Multiple modes of training are available.

- The Medical Community training will focus on the activities of the following:
  - The New Death Certificate
  - Best Practices in certifying deaths
  - Medical Certifiers: Fax vs. Online process
  - New forms
System Requirements

We recommend:

- A Windows based operating system
- High Speed Internet access, i.e. Cable, DSL, T1, T3
- 1 GB of RAM, 20 MB hard drive
- Browser: MS Internet Explorer (version 6.0 or above) or Mozilla FireFox (version 2.0 or above)
- A Printer and a Fax machine
- Google Chrome and Safari are currently not supported browsers

You will need Adobe Acrobat Reader software to print

Apple/Mac users should use an approved browser and contact us with any issues or questions as the system was not designed specifically for Apple products
How Can You Help?

- Understand the coming changes and your options. Request accounts; if desired

- Refer potential partners to us for information:
  - Email us at vip@state.ma.us with questions, or requests for account forms
  - Retrieve our forms, webinar schedule, brochures and other educational material at our Website under VIP Updates:
    - http://www.mass.gov/dph/vip

- Give or email any partner who does not know about the upcoming changes a copy of our brochure
Questions?

- Email any question to the VIP Project Team mailbox: vip@state.ma.us
- Ask for a return call if you need to talk to someone
- Check our Website for updates: http://www.mass.gov/dph/vip
Your Next Steps

- Join our Listserv:
  - Send an email to the following:
  - Subscribe-dph_rvrsmedicalfacilities@listserv.state.ma.us
  - Have your physicians and certifying nurse practitioners send an email to the following:
  - Subscribe-dph_edrsmedicalcertifiers@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.

- Determine your options and desired process for compliance
- Complete VG and VIP Agreements for all users in your organization, if desired
- When available from MMS attend Certifying Death Certificates Training

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