

eVitals Funeral Home Users Training Guide

Pennsylvania Department of Health

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Changes	Version #	Date	Approver
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1. Introduction

Welcome to eVitals, the Pennsylvania Department of Health's new vital records management system for death reporting. This system will support the electronic registration and records management of birth and death records.

eVitals modernizes the electronic registration and management of Pennsylvania's vital records. This effort includes expanding integration with third-party software; improvements in managing Pennsylvania's 25 million vital records and improved in-person experiences when ordering services at one of our six Vital Records public offices.

Purpose

The purpose of this training guide is to provide learners at funeral homes with a comprehensive training guide for reporting a death in eVitals.

Audience

This document is intended for the following users at licensed funeral homes.

- Funeral Home Directors
- Funeral Home Data Entry Users

The intent of this document is to provide users, regardless of experience, with a one-stop-shop for working with cases when reporting a death.

Resources

• eVitals production link when available

Benefits of eVitals

As a Funeral Home user, you will have the ability to:

- Update the Place of Death field
- Run canned reports
- Access queues to help manage your workload
- Drop to Paper automatically when the case is signed, and a medical worksheet is attached to help expedite case registration
- View issues with the case in the Case Messages tab



Please visit the eVitals document library for information on the following:

- Change Business Partner email or password.
- Change Business Partner security questions.
- Retrieve Business Partner forgotten username or password.
- Request access to a new facility.

You can access the eVitals document library here.

Logging into eVitals

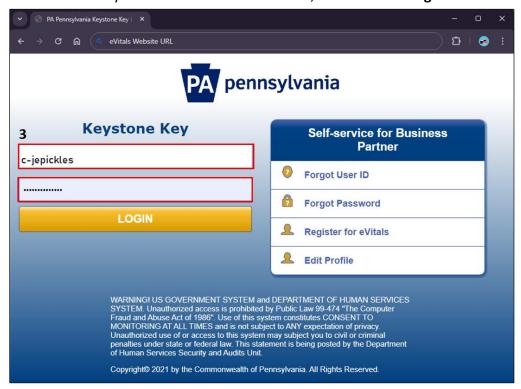
1. Enter the URL you were provided into the browser window.

NOTE: eVitals will work in any browser, however we recommend that you use the current version of Microsoft Edge or Google Chrome for optimal performance.

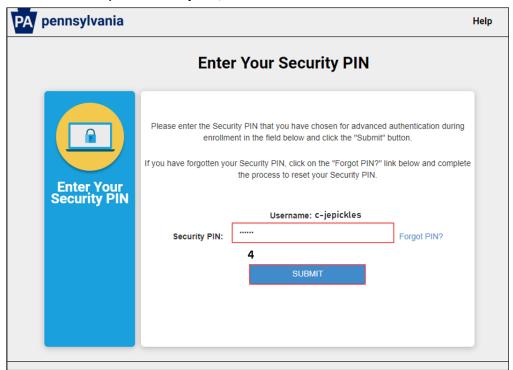
2. Click the Business Partner Login button.



3. Enter your **Username** and **Password**, then click the **Login** button.



4. Enter your **Security Pin**, then click the **Submit** button to continue.



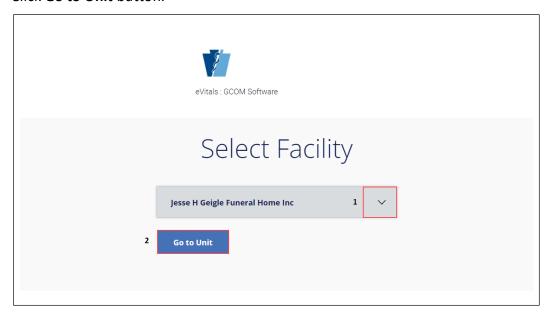


Accessing Multiple Facilities

If you are associated with one facility, you are taken to the eVitals dashboard, also called the Home Page. If you are associated with multiple facilities, you are prompted to select the facility you want to work from.

Selecting a Facility

- 1. Select a facility from the drop-down list.
- 2. Click Go to Unit button.

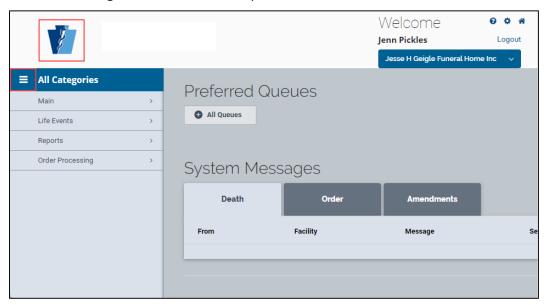


Navigating the Dashboard

The eVitals dashboard is your homepage to managing and working with death cases created by your facility and cases sent to your facility from another facility. On the left side of your dashboard is the **Navigation Panel**. You can access your dashboard from anywhere in eVitals by clicking the **Department of Health logo** in the upper-left corner of your screen.

Click the **Navigation Menu** button in the Navigation Panel to expand the categories. Depending on your job role, you may only see certain categories:

- Main Request access to a new facility, view the status of the request, set up preferred queues, view your profile.
- **Life Events** Search for an existing case, create a new case.
- Reports View and run canned facility reports.
- Order Processing Search for orders requested.





In the upper-right corner of your Dashboard, the Welcome text displays. Below the Welcome text is a drop-down list you can use to change facilities if you are associated to more than one facility. Above the drop-down is the Logout link. To prevent any issues the next time you log into eVitals, click the Logout link at the end of each session.



There are three icons above the Logout link:



The **Help** icon displays student manuals, job aids/quick reference guides for eVitals.

The **Gear** icon displays your profile information. You can view your personal information, your facilities and roles information, and login history.

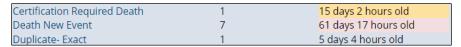
The **Home** button returns you to your dashboard regardless of where you are in eVitals. As a case progresses through the creation process it moves across multiple queues. A case will

sit in a queue until it is ready to be worked. Depending on your role, you can view a list of all queues a case can sit in via your dashboard.

Accessing Queues

You can manage your workload by monitoring the queues on your dashboard. You can view the queues you have access to by displaying the queues under the **Queue List** or setting up **Preferred Queues.**

The Queue List displays a repository for cases depending on their case status. Next to each queue name is the count of how many cases are sitting in that queue and then on the far right displays the age of the oldest case in the queue.

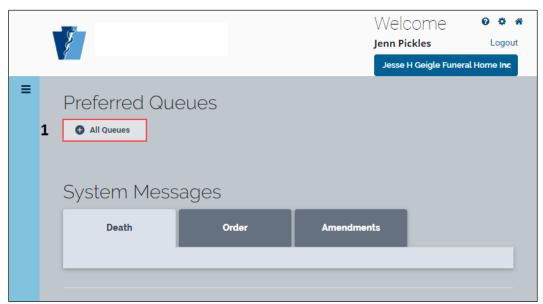


You can use the colors to help manage productivity at your facility and to ensure that deaths are reported to the Department of Health in the required timeframe. (All deaths must be reported within four business days.)

- Red The oldest case is 25 days or older.
- Yellow The oldest case is between 10 24 days old.
- No color The oldest case is less than 10 days old.

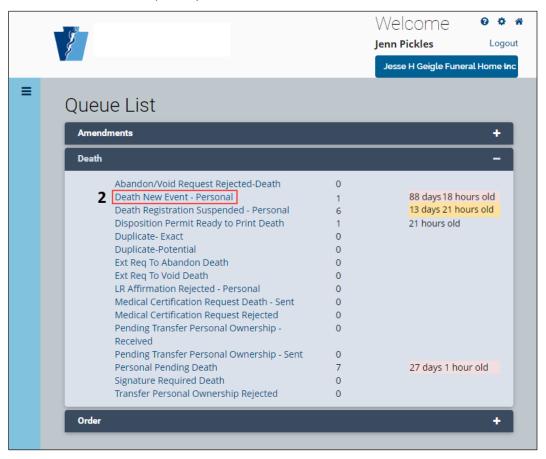
Viewing the Queue List

1. Click **All Queues** button to display the list of queues.

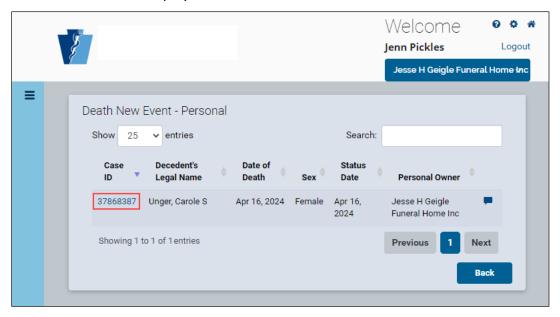




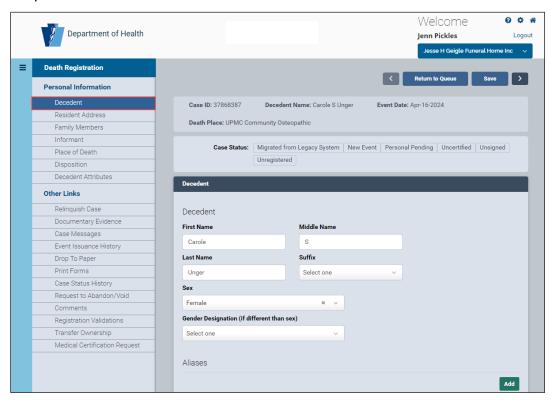
1. Click the name of the queue you would like to view the cases.



3. Click the Case ID to display the case.



The case opens to the Decedent tab.



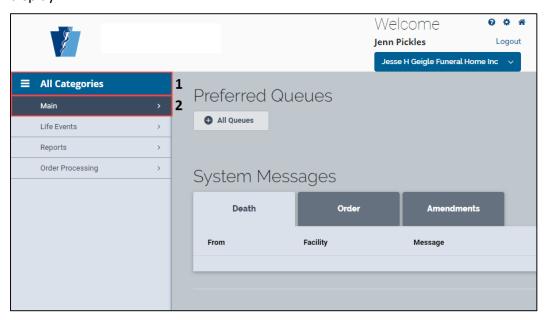
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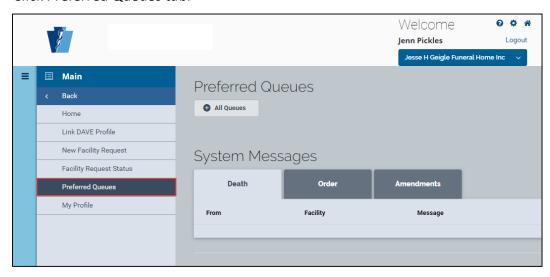
Preferred Queues are a list of frequently accessed queues that you display on your dashboard. You can use the queues to monitor productivity, workload, or follow processes your organization may have in place for case handling. If you have access to multiple facilities, then you can set up different preferred queues for each facility. When setting up Preferred Queues, you can set up a maximum of seven queues.

Setting Up Preferred Queues

- 1. Click the **Navigation Menu** button in the Navigation Panel to expand the categories.
- 2. Click the **Main** category to further expand the options. The additional options will display.



3. Click Preferred Queues tab.

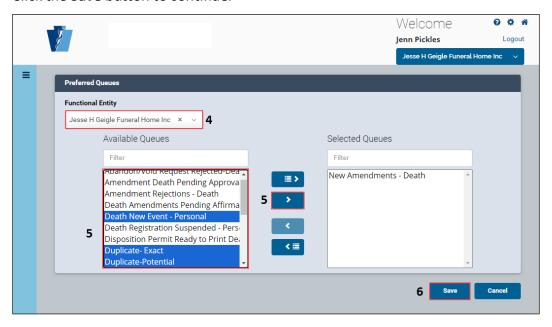


- 4. If you are associated with multiple facilities, select the facility you are setting up Preferred Queues for from the drop-down list.
- 5. Select the queue you would like to add from the Available Queues list, then click the

 Add button to move it to the Selected Queues list.

NOTE: Hold down the Ctrl key on your keyboard and select up to seven queues to add to your Selected Queues list.

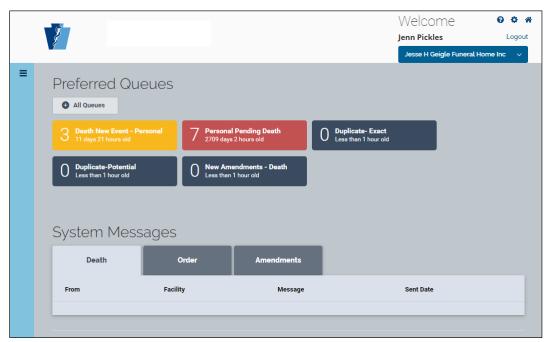
6. Click the **Save** button to continue.





The queues you selected will display on your dashboard. Similar to the queues that display under the **All Queues** list, your Preferred Queues are color coded based on the age of the oldest in the queue:

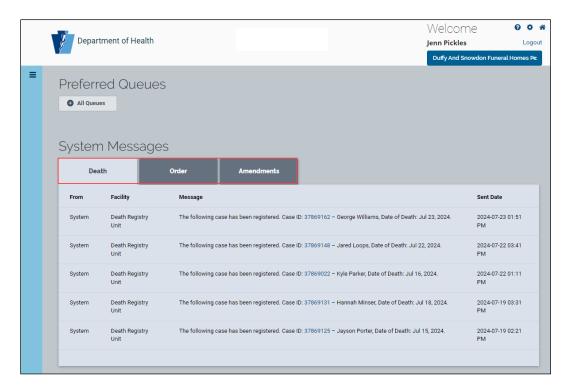
- Red The oldest case is 25 days or older.
- Yellow The oldest case is between 10 24 days old.
- No color The oldest case is less than 10 days old.



System Messages

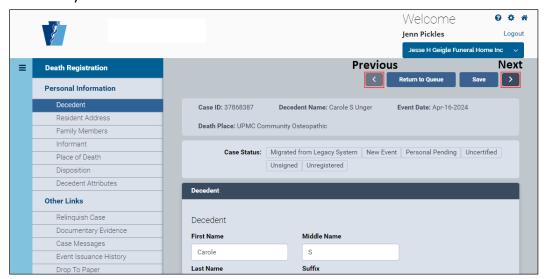
System Messages are job-role specific messages that display on your dashboard. They display according to the facility you are logged into. You may receive notifications about case messages, approved case registrations, case suspensions, or direct messages from the Death Registry Unit related to cases in the event of a query on the Death tab. On the Order tab, you may receive messages about orders issued for death certificate orders you have placed and if you have access to the Amendments tab, you may see messages related to any amendments submitted on that tab.

Only the 10 most recent messages will display at a time.





eVitals contains the navigation panel on the left side of your screen and your workspace in the center. At the top of your workspace are your page navigation buttons **Previous** and **Next**. You can use these to navigate the pages of the case, or you can click the tabs in the navigation panel. The **Return to Queue** button takes you back to your previous search results for locating a death case and the **Save** button saves the information on the page. These buttons also display at the bottom of your screen.



Validation Types

As you complete the tabs in the navigation panel, colored validation dots display next to each tab, indicating the tab's status.

There are three types of validation indicators in the navigation panel or in a case: - A red dot indicates a hard error on the page or a tab that you need to complete. You cannot certify a case until all red dots are green. - A yellow dot indicates a soft error. You still need to enter data for soft errors or correct soft errors however, eVitals also allows you to override the error via a Validation Message at the bottom of the page. The page will not save successfully until you correct the soft error. - A green dot indicates the tab was saved successfully. Once all of the tabs have green dots you can sign the case. When you save your information, eVitals performs a validation check in the background. It highlights any errors in red or yellow depending on the type of information you enter. Validation messages display at the bottom of your screen. For additional information on the types of validation messages, please see the job aid (GCOM will provide the link to job aid.) If your page has a red dot or yellow dot after saving, check for hard or soft errors that need to be addressed. - A red highlighted field indicates a hard error that must be addressed. The page cannot be saved until the error(s) are corrected. - A yellow highlighted field indicates a soft error that must be addressed. The page cannot be saved until the error(s) are corrected or overridden at the bottom of the page.



- 1. After you verify the information is correct, select the Override checkbox, and if applicable, enter a reason for the override.
- 2. Click the **Save Override** button. It is important to save the override prior to saving the page otherwise the override does not save.
- 3. Click the **Save** button to continue. The red dot changes to green if there are no errors.

NOTE: You can also override validation messages in the <u>Registration Validations</u> page under the Other Links section in your case.

Methods for Locating a Case

In eVitals, you can locate a case several ways, depending on the information available. You can use the Queue List or your Preferred Queues if you know the queue where the case resides. If you are searching for a death case based on decedent information or information in the case, use the Locate Case feature under the Life Events category.

Locate a Case

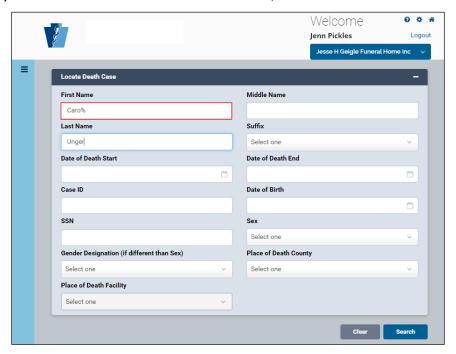
Use the Locate Case feature to search for an existing case using information from the case. You can enter as little or as much information as you have available. You can also search using the wildcard character, the **percent (%) sign**. The wildcard character allows for variations in your search. It searches for a partial value match in the absence of the entire value. You can use the % character at the beginning, middle, or end of the search to return as many results as possible.

Locating a Case

1. Click the **Navigation Menu** button → Life Events → Death → Locate Case to display the Locate Case page.

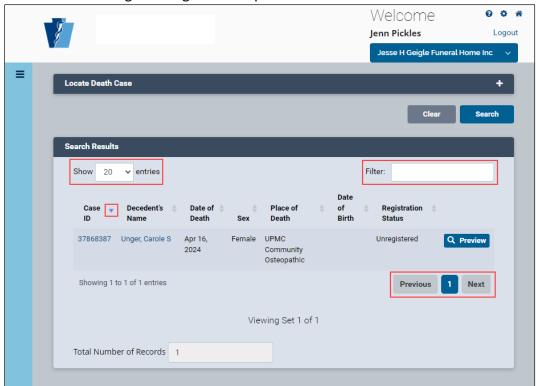


2. Enter your search criteria into the related fields, then click the **Search** button.





Your results display below the collapsed search bar. You can expand the Locate Death Case search criteria to search again using different parameters.



You can organize multiple results using the Search Results features:

Search Entries: Displays the number of entries on your screen. The options are 20, 50, 100, or All.

Sort Arrows: At the end of certain column headers are arrows you can click to place your results in ascending or descending order.

Filter: Use the filter to further narrow down your results.

If you have multiple pages in your results, you can use the navigation buttons to also view the different pages in your search results.



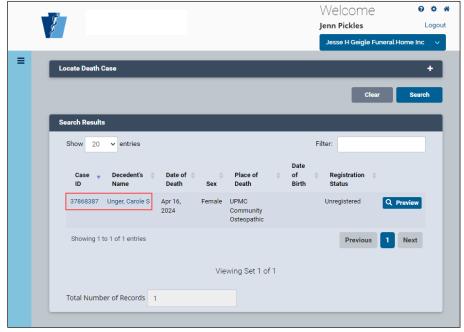
NOTE: Abandoned and voided cases display in the results however they do not have an active case ID and their details are hidden due to being inactive.

Previewing a Case

Use the Q Preview button to display a summary of the case. Review the information to determine if the case is the one you want to continue working on.



After reviewing the case summary, if it is the case you want to work with, click the **Case ID** or the **Decedent's Name** in the Search Results to open the case.



If you do not see the case you want to work with in the results list, proceed to the next section on how to create a new death case.



2. Funeral Home Data Entry User

As a user with the *External Death Medical Facility (MF) User* role, you are able to perform the following functions:

- Start a new death case
- Search for, or claim an existing death case
- Refer cases/cancel requests to the ME/Coroner
- Transfer/Relinquish ownership of a case
- Assign a pronouncer to a case
- Work with Abandoning/Voiding cases
- Access case messages and comments
- Access a working copy of the case
- Access Documentary Evidence
- Initiate an Amendment
- Enter a medical certification request
- Initiate the Report of Maternal Death form
- Generate Bureau of Health Statistics and Registries reports

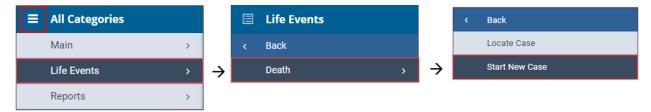
Create a New Death Case

eVitals provides you with a modernized, easy-to-use user interface for creating a death case. You can verify addresses and populate Funeral Home information at the click of a button and verify information that needs to be corrected or can be overridden with highlighted fields.

As a Funeral Home Data Entry user, once you create the case, the Funeral Director then logs in to sign the case.

Creating a New Death Case

1. Click the **Navigation Menu** button, then select → Life Events → Death → Start New Case.

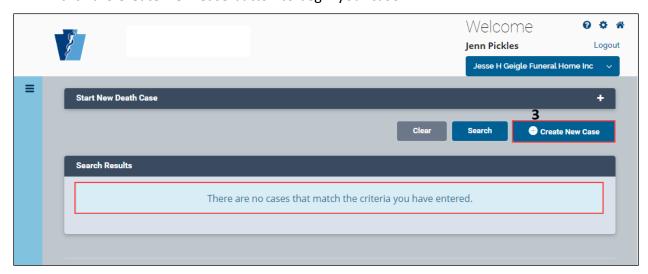


2. Enter the decedent's First Name, Date of Death, and select their Sex from the drop-down list, then click the **Search** button. You can enter any additional information if available.





3. eVitals searches for potential and exact matches in the information. If no matches exist, click the **Create New Case** button to begin your case.



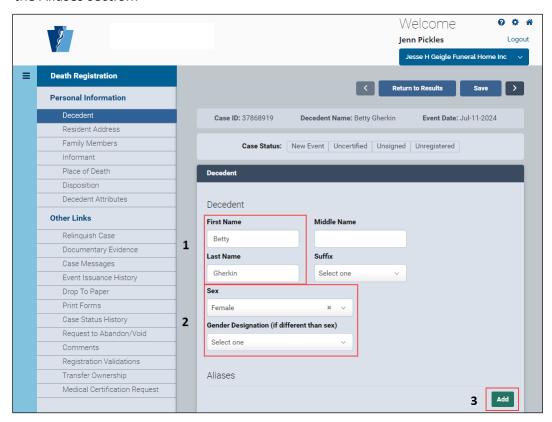
Entering Personal Information

Entering the Decedent's Information

The Decedent tab is where you verify the Decedent's name and sex/gender designation information, the birth and social security number availability, and birthplace armed services information.

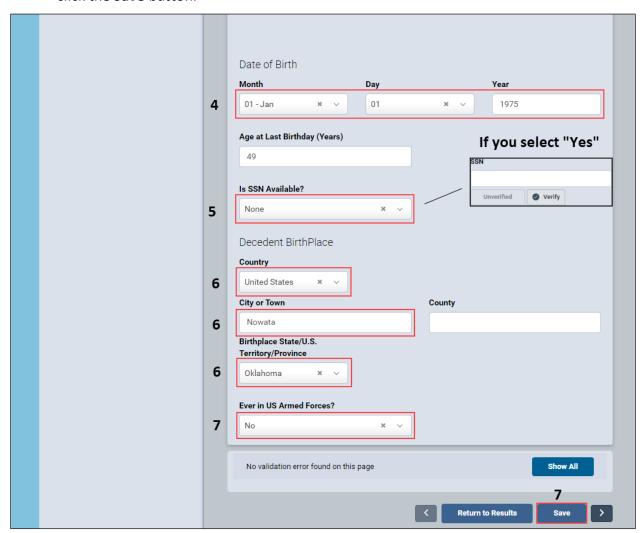
To Enter the Decedent's Information

- 1. Verify the Decedent's name is correct.
- 2. Verify the sex and gender designation are correct.
- 3. If the Decedent went by any other legal name(s), click the **Add** button to add them in the Aliases section.

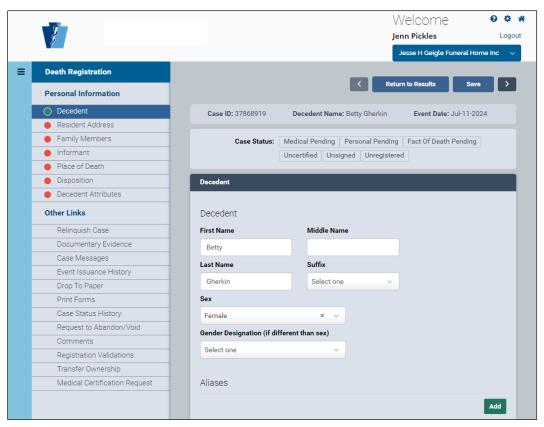




- 4. Next, enter the Decedent's date of birth. Age is automatically calculated.
- 5. If the Social Security Number is available, select Yes from the drop-down.
 - a. If you select **Yes**, enter it in the SSN field and then click the **Verify** button to validate it.
- 6. Select the country where the Decedent was born.
 - a. **United States**: If the Decedent was born in the US, you must enter the city/town where she/he was born. You can enter the County if it is available.
 - b. **Canada**: If the Decedent was born in Canada, you must select the province where she/he was born.
 - c. All Other Countries: You do not need to select any additional information.
- 7. Lastly, select form the drop-down list if the Decedent served in the Armed Forces, then click the **Save** button.



When you click the **Save** button, eVitals validates the information you entered on the page. A green dot displays, indicating the page successfully save. You can proceed to the next page.



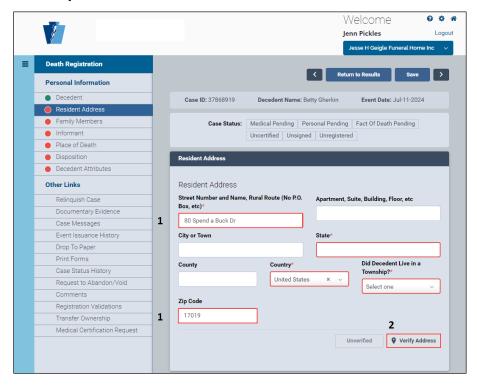
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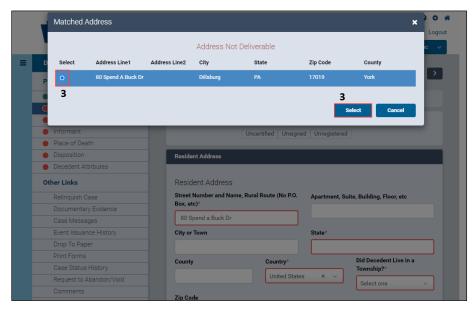
The Resident Address page is where you enter the Decedent's address and township information.

To Enter the Decedent's Address

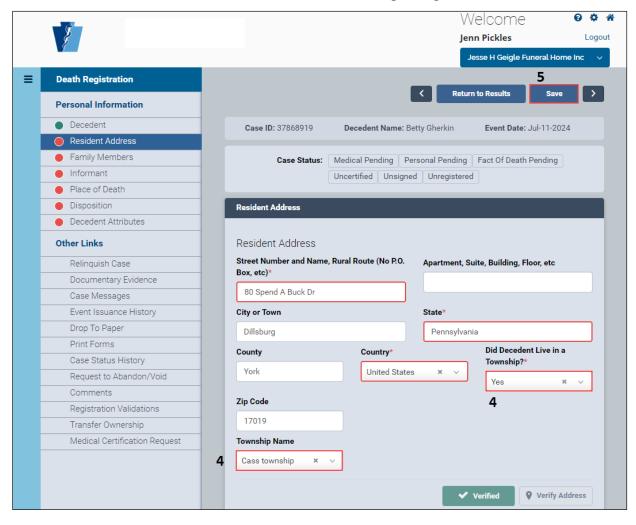
- 1. Enter the Street Number and Name, and Zip Code.
- 2. Click the Verify Address button.



3. The Matched Address window displays. Select the address, then click the **Select** button. The city/town, state, and county information populate into the case.



- 4. Select from the drop-down whether the Decedent lived in a township. If the Decedent did, select the township name from the Township Name drop-down list.
- 5. Click the **Save** button to continue. The red dot changes to green if there are no errors.



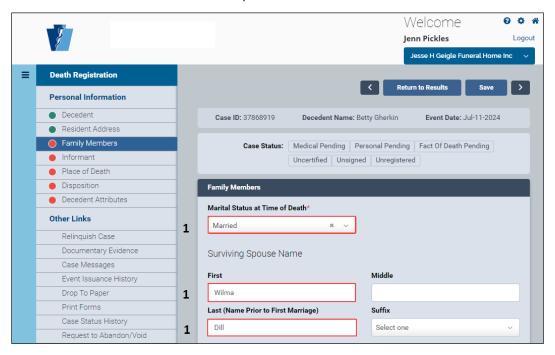


Entering the Family Members Information

The Family Members page is where you enter the Decedent's marital status at the time of death and parental information.

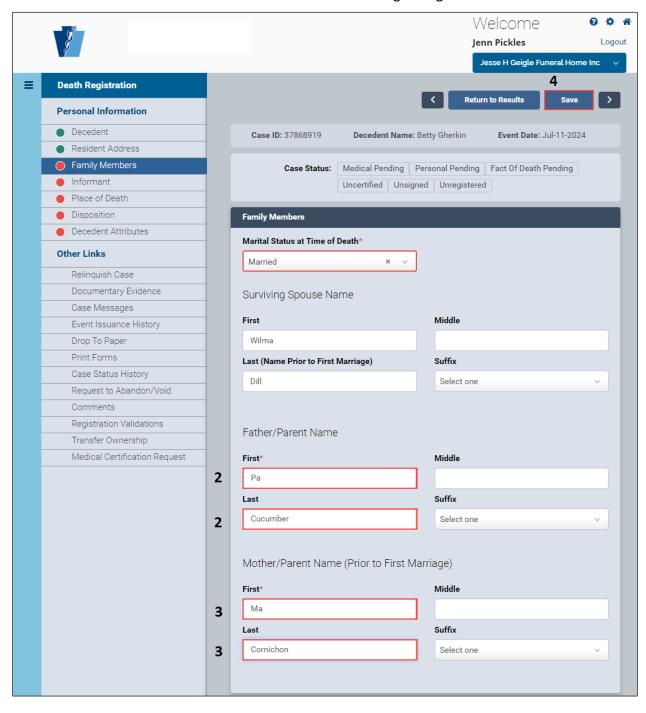
To Enter the Family Members Information

1. Select the Decedent's marital status at the time of death from the drop-down list. If married at the time of death, enter the name of the Decedent's widow.



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- 2. Enter the Father's First Name and Last Name if available.
- 3. Next, enter the Mother's First Name and Last Name (Prior to First Marriage) if available.
- 4. Click the **Save** button to continue. The red dot changes to green if there are no errors.

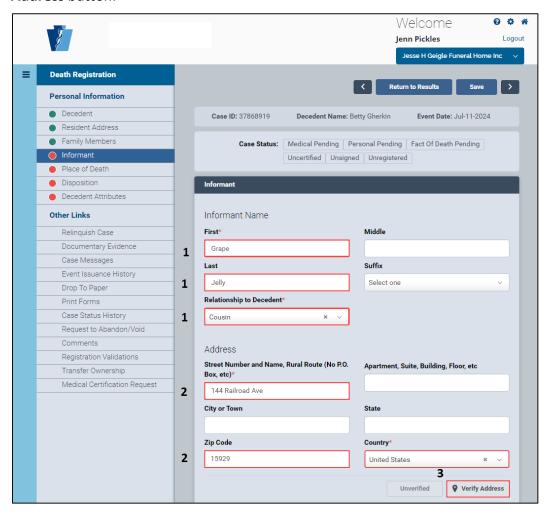




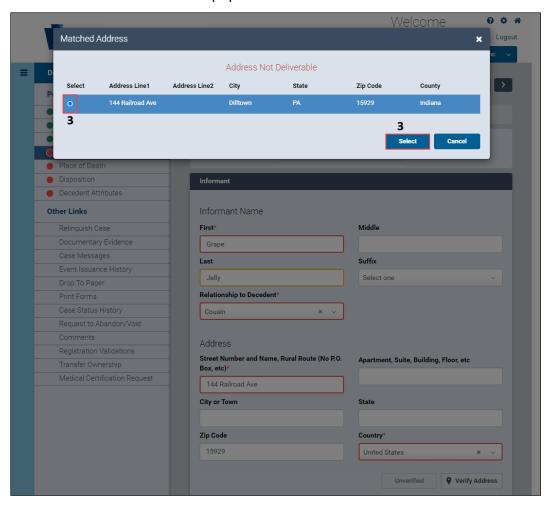
Enter the Informant's name and relationship to the Decedent, then enter the Informant's address and verify it.

To Enter the Informant's Information

- 1. Enter the Informant's First name and last name (if available,) and then select their relationship to the Decedent from the drop-down list.
- 2. Enter the Informant's address. Enter the Street Name and Zip Code, then click the **Verify Address** button.



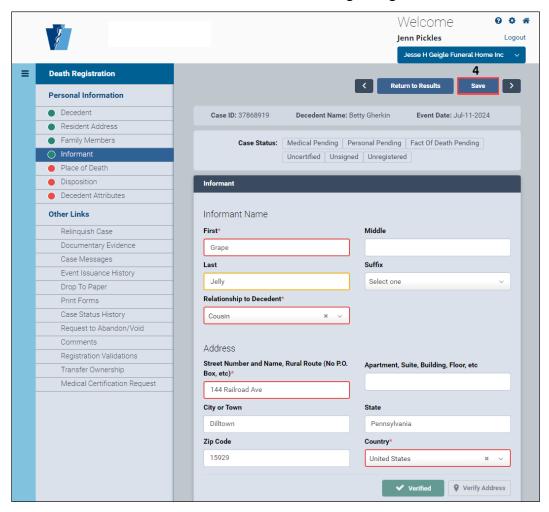
3. The Matched Address window displays. Verify the address is correct, select the Address then click the **Select** button to populate it into the case.





The address from the Matched Address window displays in the case, populating the City or Town field and the State field for you. The **Verify Address** button is disabled, and the **Unverified** button changes to a disabled green Verified button with a checkmark.

4. Click the **Save** button to continue. The red dot changes to green if there are no errors.

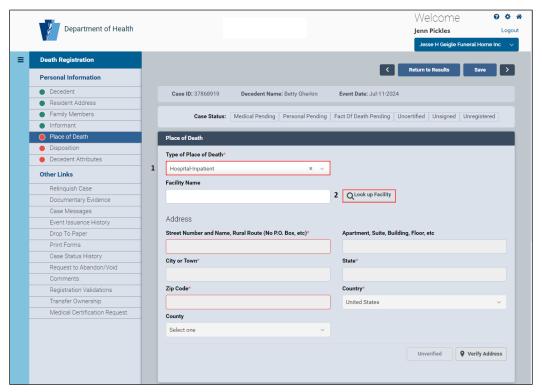


Entering the Place of Death

When selecting the place of death, you must identify if the decedent passed away at a licensed medical facility, their place of residence, or another location which you will need to specify. If you select Other (Specify) as the place of death, you must manually enter the location of where the death occurred, then enter the address.

To Enter the Place of Death

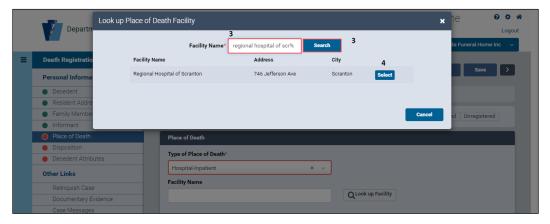
- Select where the death occurred from the drop-down list.
 If you select Other (specify) as the place of death, you have to manually enter the other place of death, enter and verify the address, and specify if the decedent passed away in a township.
- 2. If you select a licensed medical facility as the place of death, you must identify the facility via the Look up Facility button. Click the **Look up Facility** button.



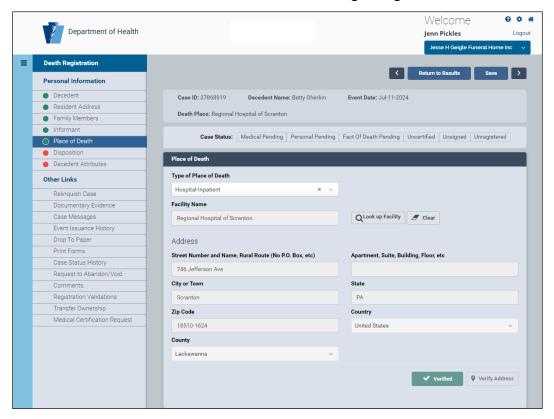
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- 3. Enter the name of the facility in the Facility Name field, then click the **Search** button.
- 4. Click the **Select** button if the facility name displays in the results to add the facility to your case. Your case populates with the facility information.



5. .Click the **Save** button to continue. The red dot changes to green if there are no errors.



Entering the Disposition

The Disposition page is where you select how the decedent's remains will be disposed. The remains can be disposed via one of the following ways:

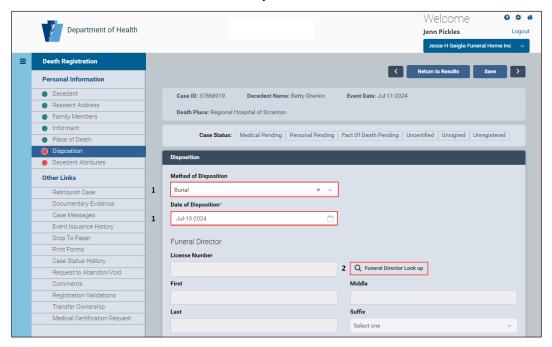
- Burial
- Cremation
- Removal from State
- Donation
- Other (Specify)

When entering the disposition, there are a few key points to remember:

- If selecting a disposition other than Burial or Other (Specify,) answer the question if the ME/Coroner approved the final disposition.
 - Yes Enter the ME/Coroner's name
 - \circ No -
- If you select *Other (Specify)* as the method of disposition, you must enter what the other method of disposition is, for example: burial at sea.

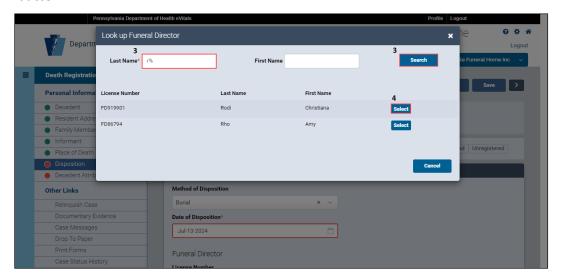
To Enter the Disposition

- 1. Select the Method of disposition from the drop-down list, then select the date of the disposition.
- 2. As a Funeral Home Data Entry User, you are going to assign a Funeral Director to the case. Click the **Funeral Director Look up** button.

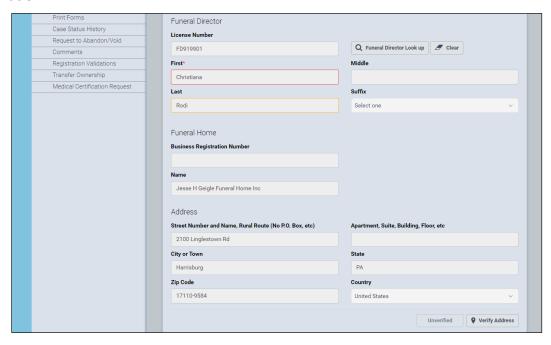




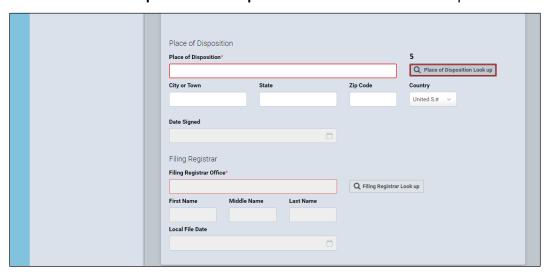
- 3. In the Look up Funeral Director window, enter the Funeral Director's last name, then click the **Search** button.
- 4. In the results section, locate the Funeral Director you want to assign and click the **Select** button.



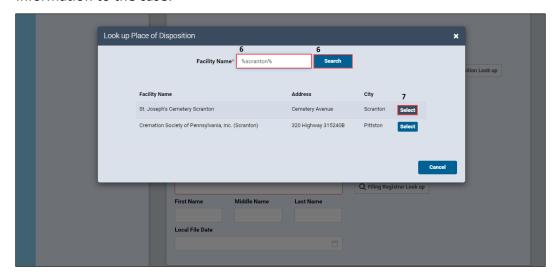
The case populates with the Funeral Director's name and License Number. The Funeral Home's information also populates into the case. Continue down the page to enter the Disposition information.



5. Click the **Place of Disposition Look up** button to locate where the disposition will occur.

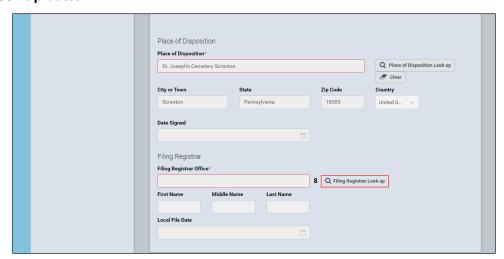


- 6. Enter the facility name in the search field, then click the **Search** button.
- 7. Locate the name of the facility, then click the **Select** button to add the facility's information to the case.





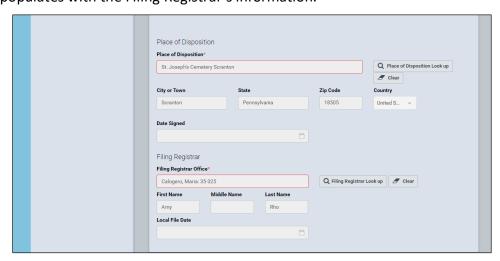
8. Lastly, you want to select the Filing Registrar for your case. Click the **Filing Registrar Look up** button.



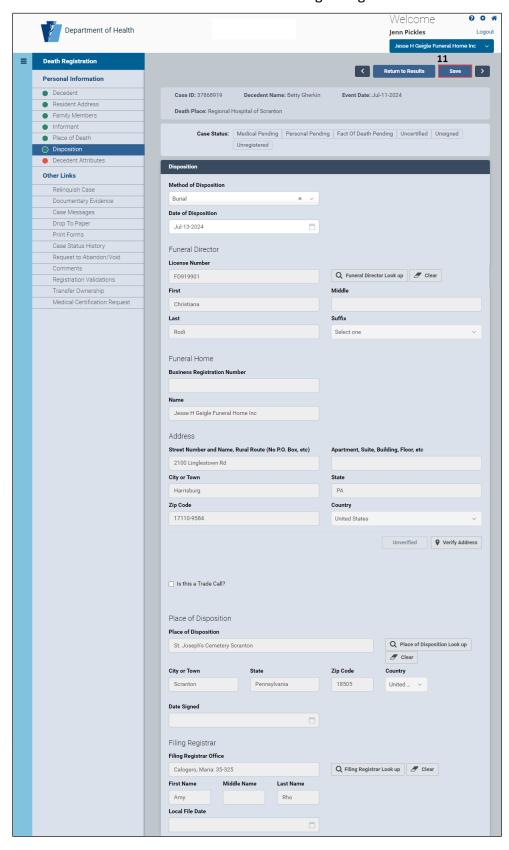
- 9. Enter the name of the Local Registrar you want to assign the case to in the Facility Name field, then click the Search button.
- 10. Click the **Select** button to assign the Registrar to your case.



The case populates with the Filing Registrar's information.



11. Click the Save button to continue. The red dot changes to green if there are no errors.



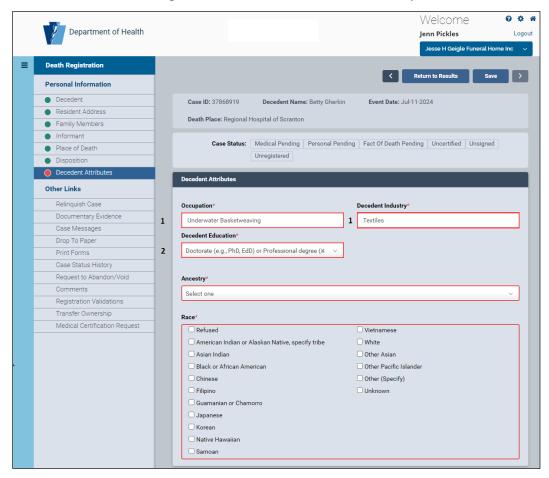


Entering the Decedent's Attributes

For the Decedent's attributes, enter their usual occupation, which may not necessarily be their last occupation. Do not enter retired, instead, provide information about the type of work they did during the majority of their life.

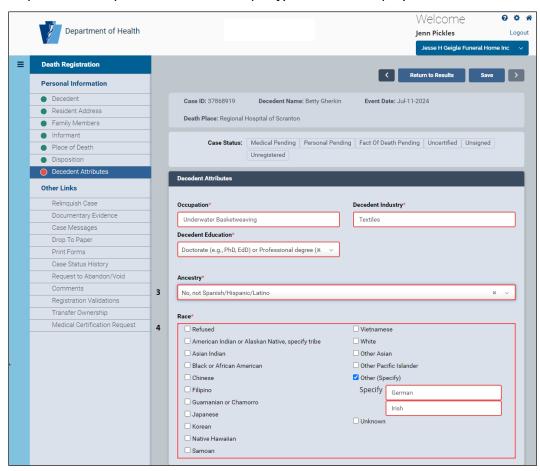
To Enter the Decedent's Attributes

- 1. Enter the Decedent's Occupation, then the Decedent's Industry.
- 2. Select the Decedent's highest level of education from the drop-down list.



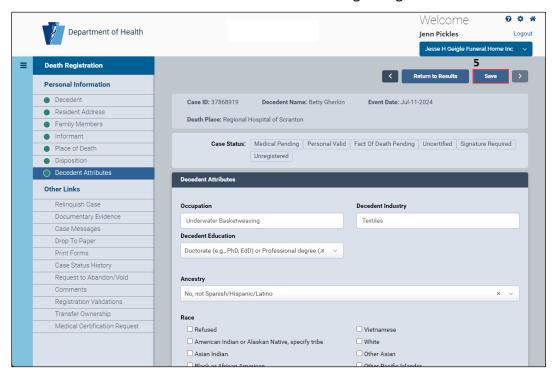
- 3. Select the Decedent's Ancestry from the drop-down list.
- 4. Next, select a checkbox(es) for the Decedent's Race.

 If you select American Indian or Alaskan Native or any of the Other options, you are required to complete the additional Specify fields that display.





5. .Click the **Save** button to continue. The red dot changes to green if there are no errors.



As a Funeral Home Data Entry User, you have finished completing the case. The Funeral Director you assigned to the Disposition tab is required to log into eVitals to review and sign the case. You can continue on to learn about the tasks under Other Links.

Other Links

Beneath the Other Links section are a series of links that display depending on the status of the case.

The following links display after a case is registered:

- Order Certified Copies
- Amendment History

The following links display while a case is unregistered:

- Relinquish Case
- Transfer Ownership
- Medical Certification Request

Other Links	
	Order Certified Copies
0	Documentary Evidence
0	Case Messages
	Event Issuance History
	Drop To Paper
	Print Forms
	Amendment History
	Case Status History
8	Request to Abandon/Void
	Comments
	Registration Validations

Registered Case

Other Links	
Relinquish Case	
Documentary Evidence	
Case Messages	
Event Issuance History	
Drop To Paper	
Print Forms	
Case Status History	
Request to Abandon/Void	
Comments	
Registration Validations	
Transfer Ownership	
Medical Certification Request	

UnRegistered Case



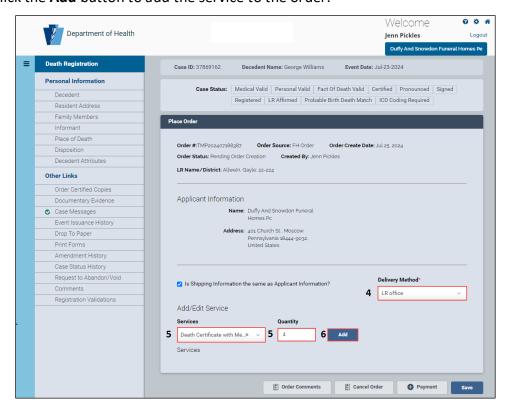
The Order Certified Copies link displays after a case is registered. When you order copies of the death certificate, it goes to your local registrar to be processed.

To Order a Certified Copy of a Death Certificate:

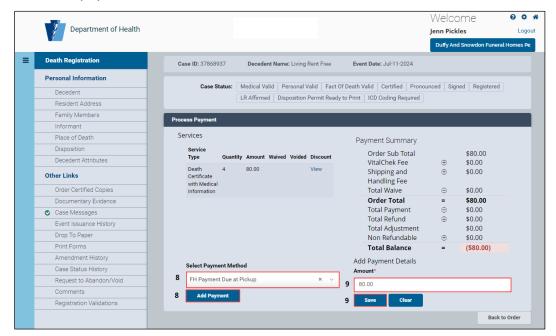
- 1. Locate the case you would like to order copies of the death certificate.
- 2. Click the Order Certified Copies link under Other Links.
- 3. Click the Create Order button.



- 4. Select the Delivery Method from the dropdown.
 - **NOTE**: You can order from your Local Registrar up to 90 days after the case has been registered.
- 5. Select the Service type from the drop-down list, then enter the amount you want to order in the Quantity field. You can add multiple services to an order.
- 6. Click the **Add** button to add the service to the order.



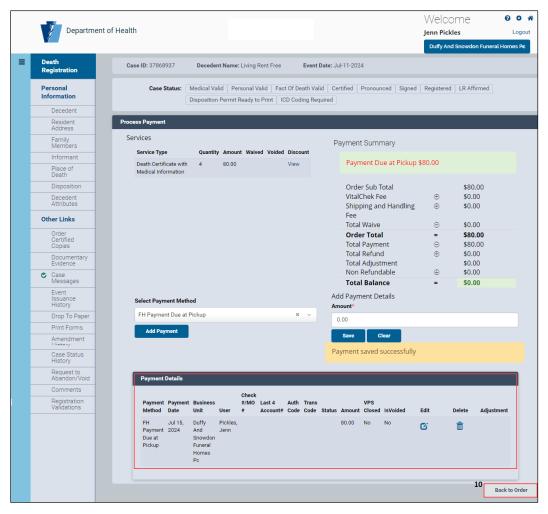
- 7. Next, select the payment method from the drop-down list, then click the **Add Payment** button.
- 8. Enter the payment amount in the Amount field, then click the Save button.



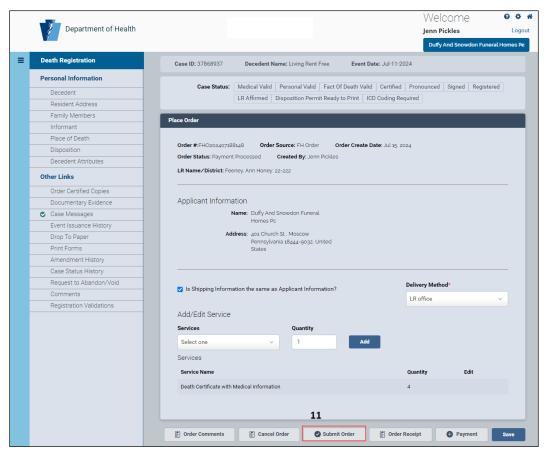


The payment method reflects the funeral home will pay at the time of pickup.

9. Click the **Back to Order** button to return and submit your order.



10. You are taken back to the order screen. Click the **Submit Order** button to complete your order. Your Local Registrar will receive your order and begin to process it.





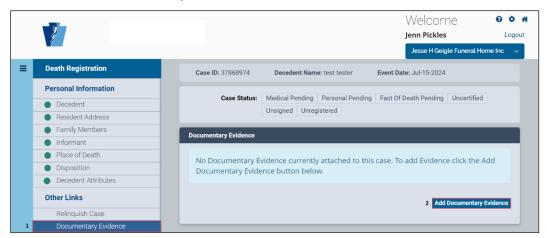
When you attach the Medical Certification Worksheet to your signed case, eVitals will automatically drop your case to paper for you. A green circle with white checkmark will display next to the Documentary Evidence link and next to the Case Messages link, indicating a message has been inserted that your case has been dropped to paper.

eVitals supports a variety of file types to upload:

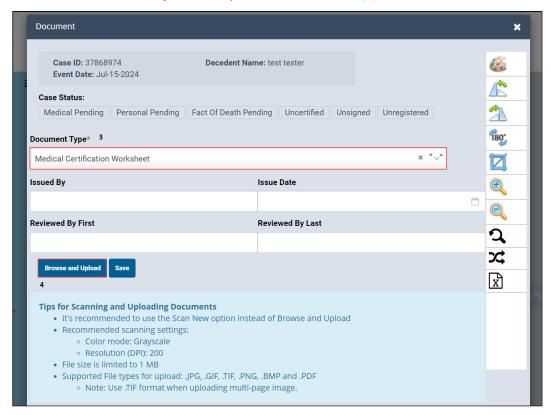
- BMP
- PNG
- JPEG
- PDF
- TIFF
- JP2

To Upload a Document to Documentary Evidence:

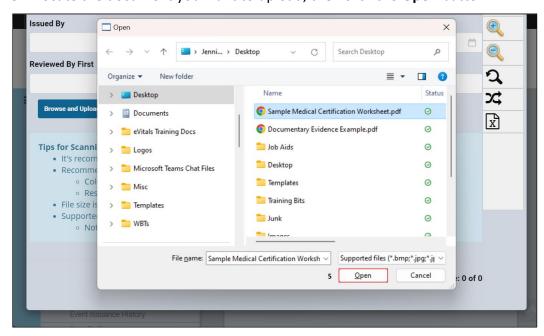
- 1. Click the Documentary Evidence link under Other Links.
- 2. Click Add Documentary Evidence button.



- 3. Select **Document Type** from the drop-down list.
 - Select Medical Certification Worksheet for hybrid cases.
 If you select **Other**, enter comments about the document you are uploading.
- 4. Click **Browse and Upload** to upload the document(s).

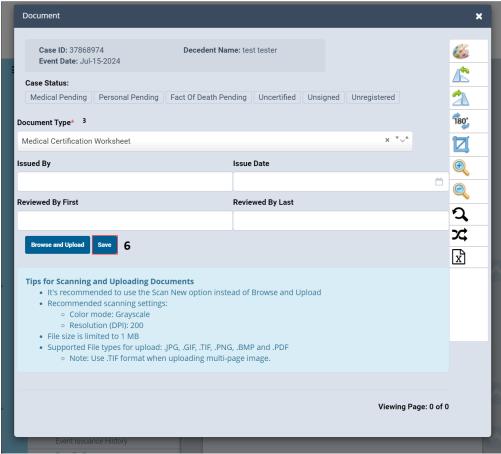


5. Locate the document you want to upload, then click the **Open** button.

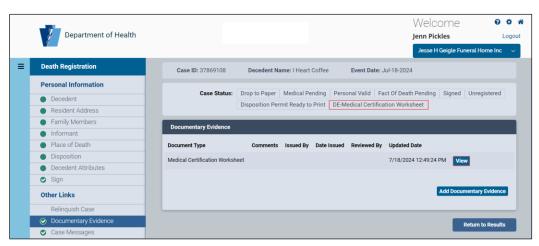


6. Click the Save button.





The document you uploaded displays in the Documentary Evidence page and can be viewed by clicking the **View** button. The type of document you uploaded is also reflected in the Case Status



Case Messages

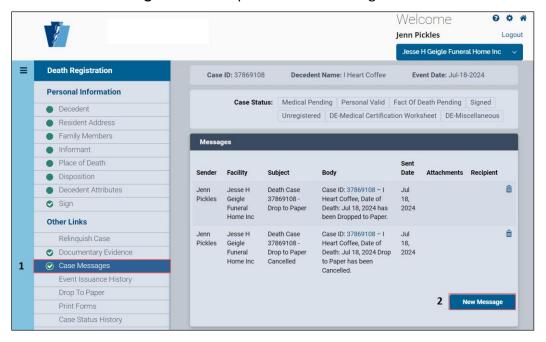
Use Case Messages if you want to communicate with users within your facility or with the Death Registry Unit.

You can send Case Messages to users based on Recipient Type:

- Functional Entity Used to communicate with the Death Registry Unit.
- Role Used to communicate with users within your facility.

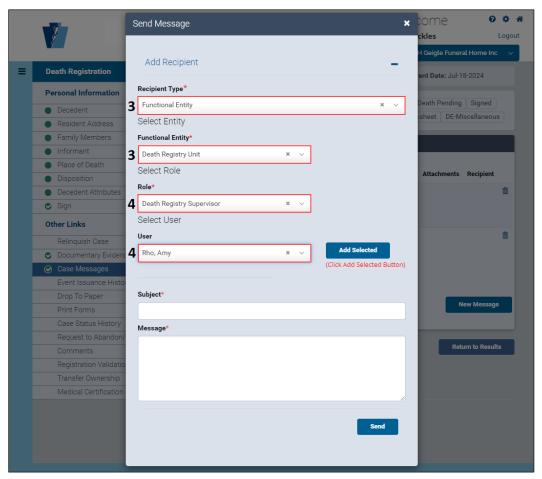
Sending Case Messages by the Functional Entity Type

- 1. Click the Case Messages link under Other Links.
- 2. Click the **New Message** button to open the Send Message window.





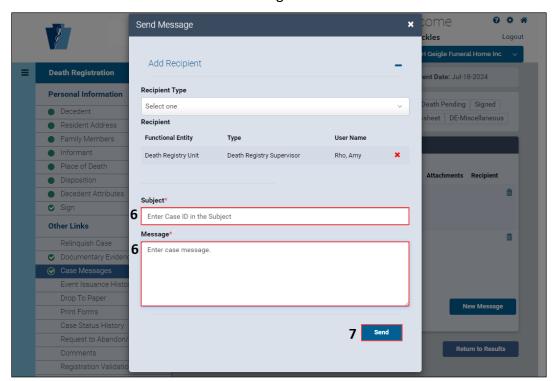
- 3. Select Functional Entity from the Recipient Type drop-down list, then select Death Registry Unit from the Functional Entity drop-down list.
- 4. Select the Death Registry Unit role from the Role drop-down list, then select the individual you want to send the message to from the User drop-down list.



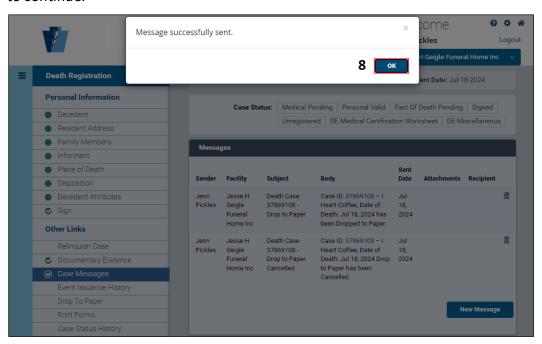
5. Click the **Add** button to add the User to your message. Repeat steps 01 – 04 to add additional users.

NOTE: Click the red **x** to remove a user from your message.

- 6. Enter your case ID in the Subject field, then enter your message in the Message field.)
- 7. Click the **Send** button to send the message.

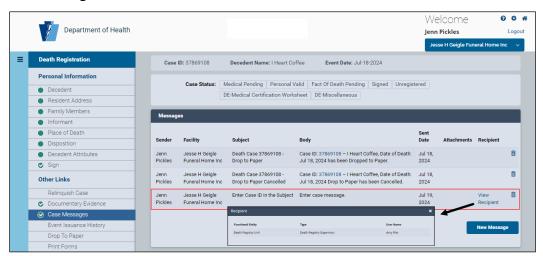


8. A pop-up window displays that your message was successfully sent. Click the OK button to continue.





Your message displays in the Case Messages list and a green circle with a white checkmark next to the Case Messages link in the navigation panel. Click the View Recipient link to view the recipient of messages in the list.

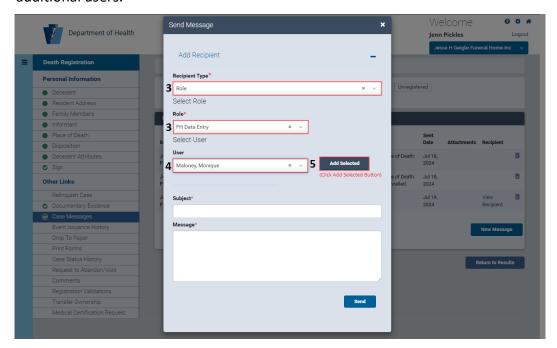


Sending Case Messages by the Role Type

- 1. Click the Case Messages link under Other Links to display the Messages page. System and user generated messages display.
- 2. Click the New Message button to open the Send Message window.



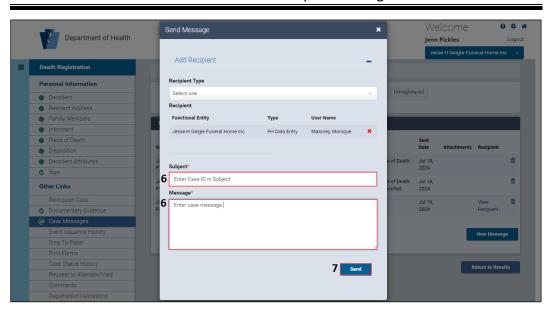
- 3. Select Role from the Recipient Type drop-down list, then select Funeral Home role from the Role drop-down list.
- 4. Select the individual you want to send the message to from the User drop-down list.
- 5. Click the **Add** button to add the User to your message. Repeat steps 01 04 to add additional users.



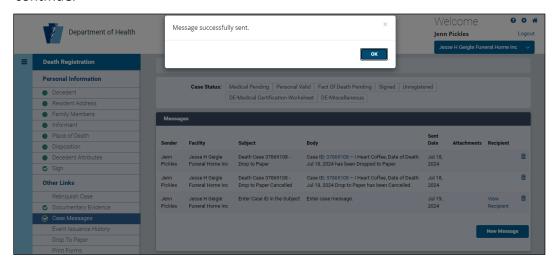


- 6. Enter the case in the Subject, then enter the message in the Message field.
- 7. Click the **Send** button to deliver the message.

NOTE: Click the red **x** to remove a user from your message.

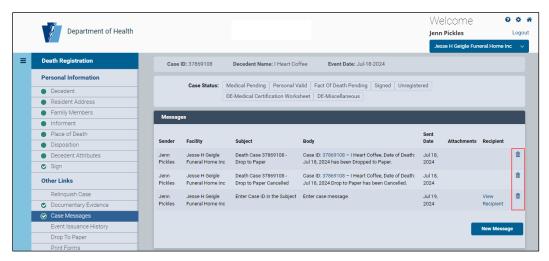


8. A window displays confirming that your message was sent. Click the **OK** button to continue.



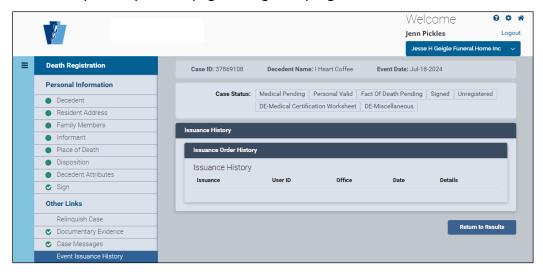
Deleting Case Messages

To delete a case message, click the trash can icon at the end of the message row. Make sure you want to delete the message, as there is no confirmation window and no way to retrieve it once it is deleted.





You will not see any activity on this page during case progression.

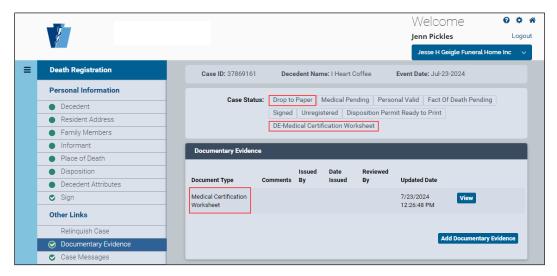


Drop To Paper

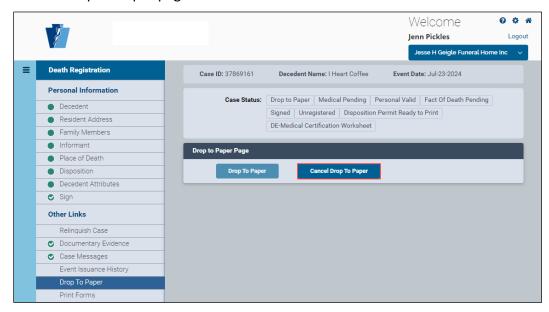
When dropping a case to paper, your case needs to be signed and verify the medical certification worksheet is uploaded to the Documentary Evidence page. eVitals automatically drops the case to paper and no further action is needed.

Auto Drop to Paper

1. In your signed case, upload the medical certification worksheet to the Documentary Evidence page. eVitals automatically assigns the Drop to Paper and DE-Medical Certification Worksheet case statuses.

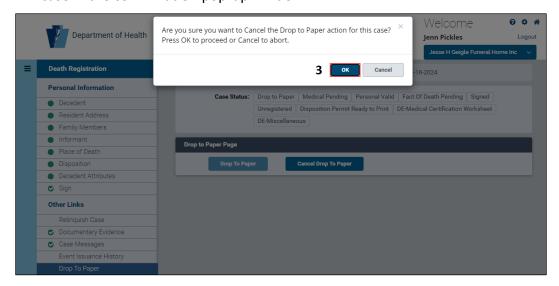


2. If you need to cancel the Drop to Paper, click the **Cancel Drop to Paper** button on the Drop to Paper page.





3. Click the **OK** button to confirm you want to cancel the Drop to Paper action for your case in the confirmation pop-up window.



When you cancel a Drop to Paper, the Drop to Paper eVitals removes the case status and inserts a case message indicating the Drop to Paper cancellation.

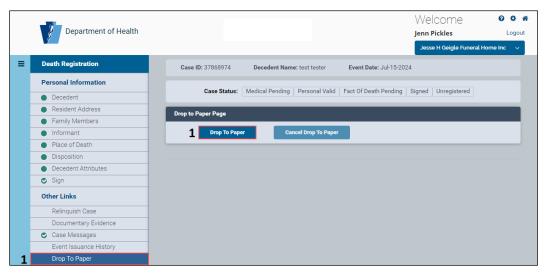


NOTES

Manual Drop to Paper

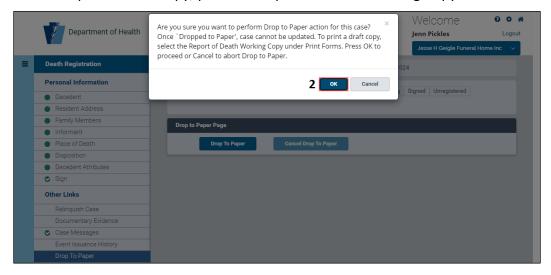
Follow these steps to manually drop your case to paper.

1. Click the Drop to Paper link under Other Links in the Navigation panel, then click the **Drop To Paper** button on the Drop to Paper Page.



2. Click the **OK** button to confirm you want to perform the Drop to Paper action on your case.

NOTE: To print a draft copy, print the Report of Death Working Copy under Print Forms.





The Print Forms page contains documents relevant to the progression of the case. The documents available change depending on the case status.

Unregistered Cases:

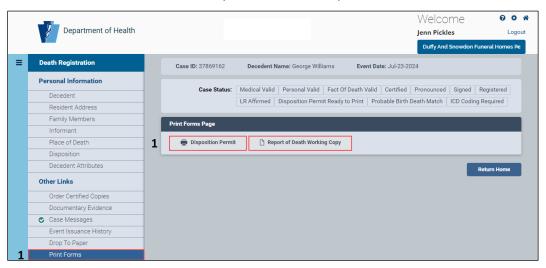
Report of Death Working Copy

Registered Cases:

- Disposition Permit
- Report of Death Working Copy

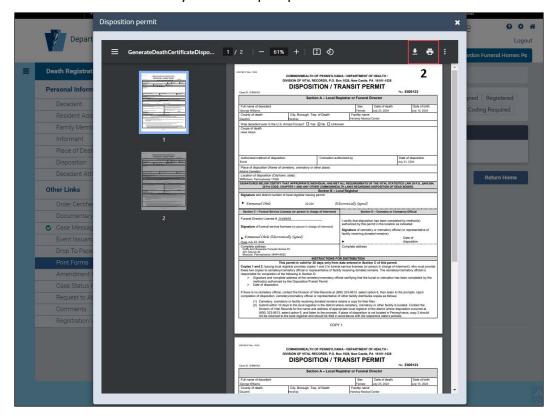
Printing Forms

1. In your registered/unregistered case, click the Print Forms link under Other Links and select the document you would like to print.



NOTES

2. The document opens in a new window. You can now print the document or save it to a location on your desktop to print at a later time.



NOTES

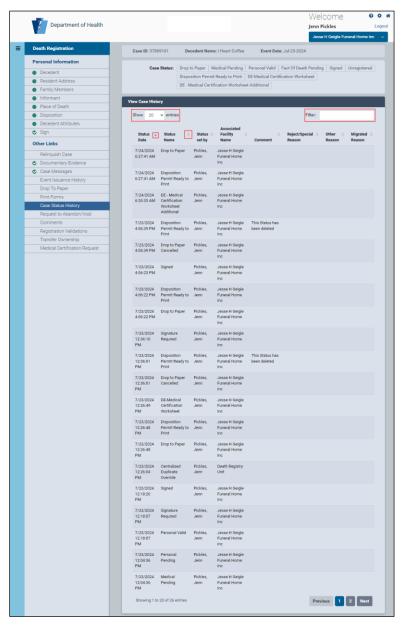


The Case Status History page provides a "who did what when" audit trail for the case status. Whenever the case status at the top of the page changes, you can see who did it, when, and their associated facility. Additional information, such as comments and reasons also display if they are available.

You can select how many entries you want to display at a time using the Show Entries drop-down and filter the results using the Filter field if you would like to see specific results.

If you would like to see your results in ascending or descending order, click a column header with a triangle next to it. A downward facing triangle indicates a descending sort or newest to oldest for dates and an upward facing triangle indicates an ascending sort or oldest to newest for dates. Use the **Previous** and **Next** buttons at the bottom to navigate multiple pages.

1. Click the Click Case Status History link under Other Links to view the Case History page.



Requesting to Abandon/Void a Case

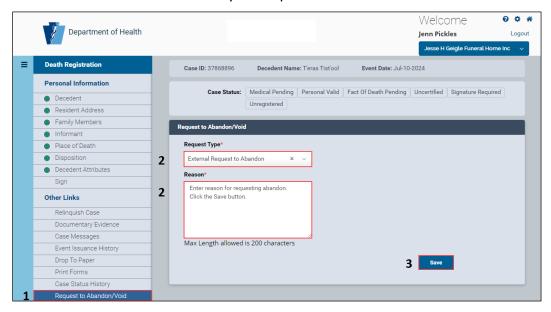
If you come across an *unregistered* case that has been created in error or is not needed, you can submit a request for it to be *abandoned*. If you have a case that has been *registered* and you determine that it is not needed, you can submit a case for it to be *voided*.

- Abandoned requests can be approved by your Facility Administrator or by the Death Registry Unit.
- Void requests can only be approved by the Death Registry Unit.

NOTE: The Death Registry Unit (DRU,) the Facility Administrator, and Deputy Facility Administrator are the only users who can access and take action on the cases in the External Request to Abandon Death queue. The External Request to Void Death queue can only be accessed and worked by the DRU. The steps to void a registered case are the same as below. The options in the drop-down lists are different.

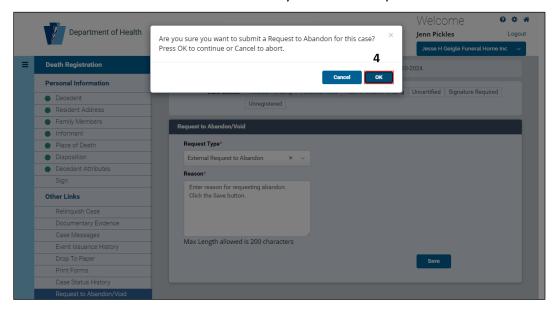
Submitting a Request to Abandon an Unregistered Case

- 1. Click the Request to Abandon/Void link under Other Links.
- 2. Select External Request to Abandon from the Request Type drop-down list, then enter your reason for requesting the abandon in the Reason field.
- 3. Click the **Save** button to save your request.





4. Click the **OK** button to confirm you want to request the abandon.



The case moves to the External Request to Abandon/Void Death queue. The case status is also updated with External request to Abandon/Void and the Case Status History page is updated with the new status change.

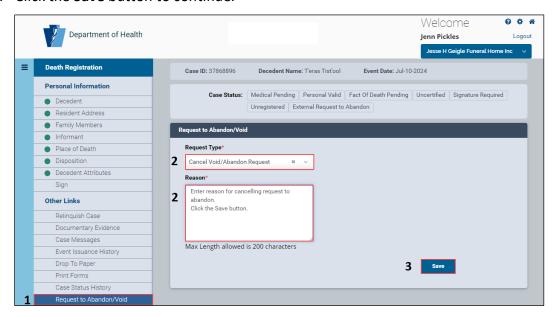
The Death Registry Unit (DRU,) the Facility Administrator, and Deputy Facility Administrator are the only users who can access and take action on the cases in the External Request to Abandon Death queue.

NOTES

Cancelling a Request to Abandon/Void a Case

You can cancel your request to abandon or void a case by searching for the case number or locating your case in the External Request to Abandon Death or External Request to Void Death queues.

- 1. Once you have your case open, navigate to the Request to Abandon/Void link.
- 2. Select Cancel Void/Abandon Request from the drop-down list, then enter your reason for cancelling the request in the Reason field.
- 3. Click the Save button to continue.



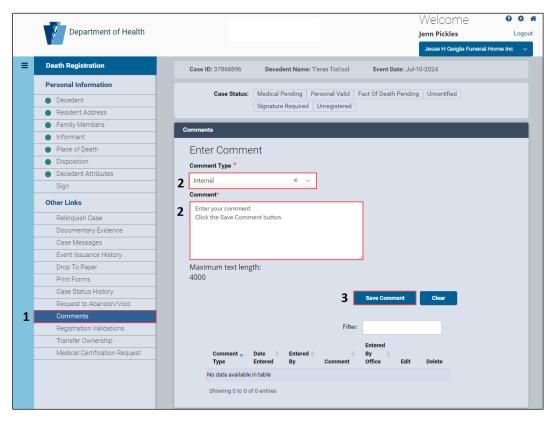


Use Comments to leave notes in your case for other authorized eVitals users to view. You can leave two types of comments in your case:

- Internal Comments display to authorized users within your facility.
- External Comments display to authorized users within eVitals who have access to the case

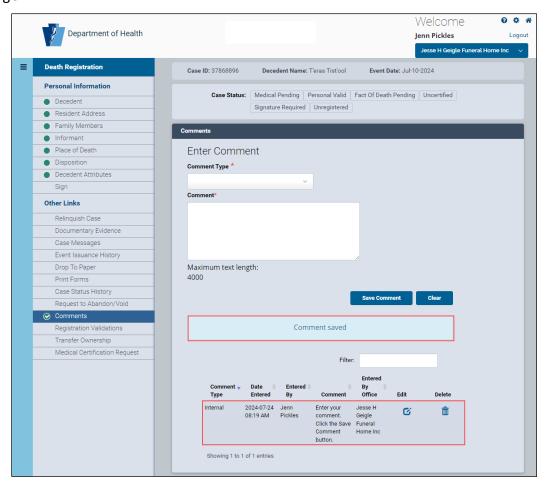
Entering a Comment

- 1. Click the Comments link under Other Links.
- 2. Select the Comment Type from the drop-down list and enter your comment in the Comment box.
- 3. Click the Save Comment button.



NOTES

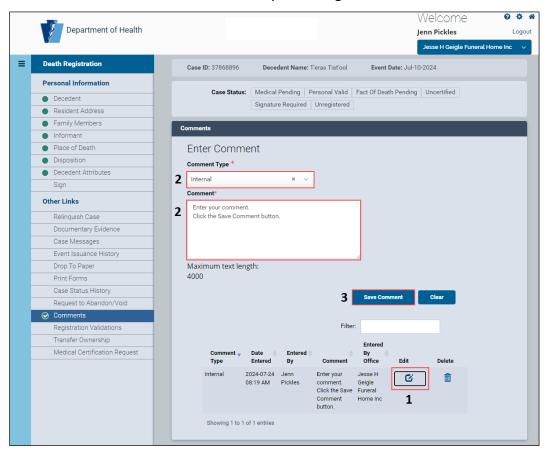
The message displays that your comment is saved, and your comment displays at the bottom of the page.



NOTES



- 1. Click the **Edit** button for the comment you want to edit. The **Edit** and **Delete** buttons display only for your comments.
- 2. This opens the Comment field and Comment Type for editing.
- 3. Click the **Save Comment** button to save your changes.



Deleting a Comment

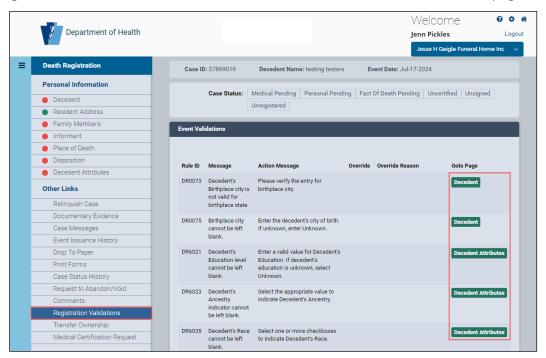
- 1. To delete your comment, click the **trash can** button at the end of your comment.
- 2. Click the **OK** button in the pop-up window to confirm deletion of your comment.

The message that your comment has been deleted displays and your comment no longer displays at the bottom of the page.

Registration Validations

The Registration Validations page displays validation errors across all tabs in your case. You can fix the override errors on this page, or you can click the green button at the end of the row to view the error on the page and correct it from that page.

Click Registration Validations link under Other Links to view the Event Validations page.



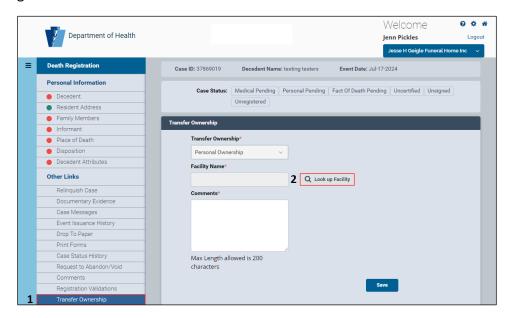
NOTES



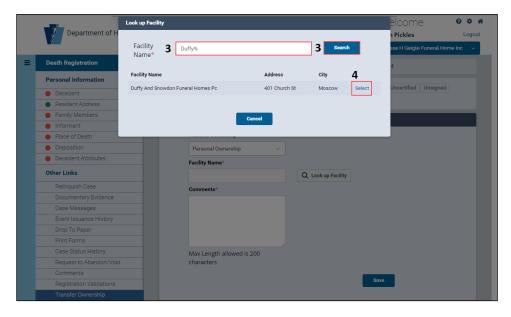
Use Transfer Ownership if you need to transfer an unregistered death case to another facility. When you initiate an ownership transfer, the facility to which you are transferring the case accepts or rejects the case.

Transferring Ownership

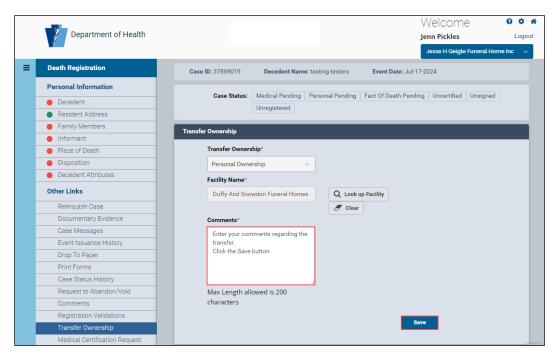
- 1. Navigate to the Transfer Ownership link under Other Links.
- 2. The Ownership defaults to Personal Ownership. Click the **Look up Facility** button to assign a Funeral Home.



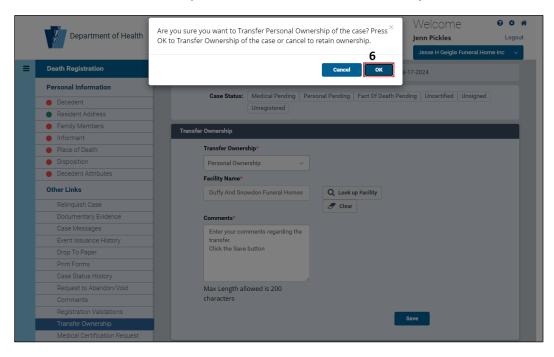
- 3. The Look up Facility window displays. Enter the facility's name to transfer the case, then click the **Search** button. You can use the "%" wildcard character in your search.
- 4. Click the Select link to add the facility to your case.



5. The facility displays in the case. Enter your reason for the transfer in the Comments field, then click the **Save** button.

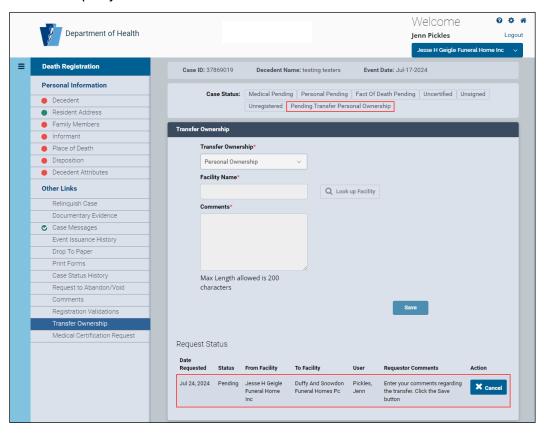


6. Click the **OK** button to complete the transfer to the new facility.





The case status changes to Pending Transfer Personal Ownership and an entry is made in the Request Status section on the Transfer Ownership page of the case. The case will sit in the queue Pending Transfer Personal Ownership – Sent until the other facility accepts or rejects the case. If the other facility rejects the transfer, it will fall into your facility's queue Transfer Personal Ownership Rejected.



Cancelling Transfer Ownership

- 1. To rescind the transfer, click the blue **Cancel** button at the end of the entry under the Request Status section.
- 2. Enter your reason for cancellation in the Transfer Ownership Request Cancellation window, then click the **Save** button.
- 3. The Request Status shows as cancelled and your facility retains personal ownership of the case.

Medical Certification Request

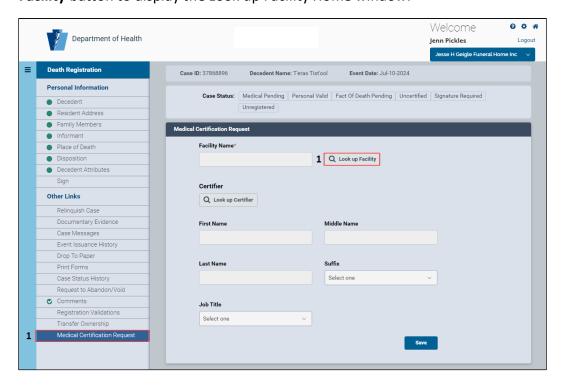
If you need the medical in your case to be certified, you can request a specific certifier at a medical facility by assigning them via a Medical Certification Request or you can assign a facility in which any certifier will pick up the case, complete the medical, and certify the case.

When you request a certifier from a medical facility to certify your death case, use the Medical Certification Request to assign a certifier. They receive a notification, and the case falls into the other facility's *Medical Certification Request Death – Received* gueue for them to pull the case.

After you send the case, the request sits in your facility's *Medical Certification Request Death – Sent* queue until the certifier from the other facility accepts the request. If they reject the case, the case returns to your facility and falls into the *Medical Certification Request Rejected* queue.

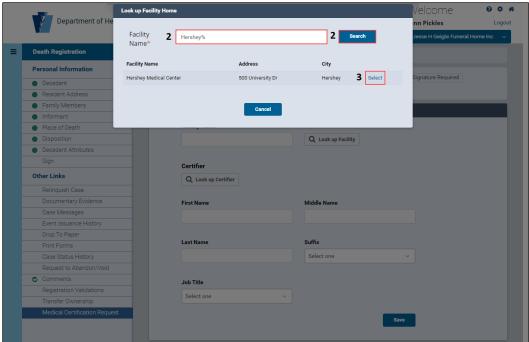
Requesting a Medical Certification Request

1. Click the Medical Certification Request link under Other Links, then click the **Look up Facility** button to display the Look up Facility Home window.

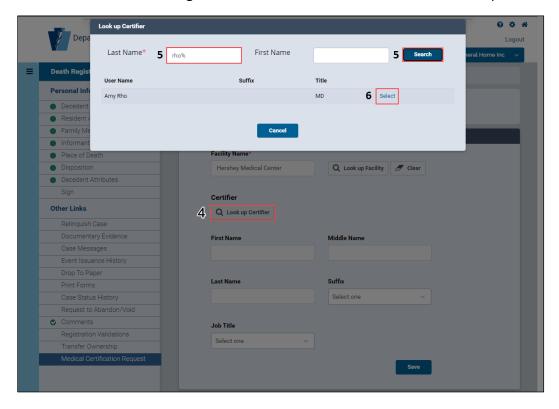


- 2. Enter the name of the facility where you want to send the request, then click the blue **Search** button.
- 3. Click the Select link to add the facility to your Medical Certification Request.

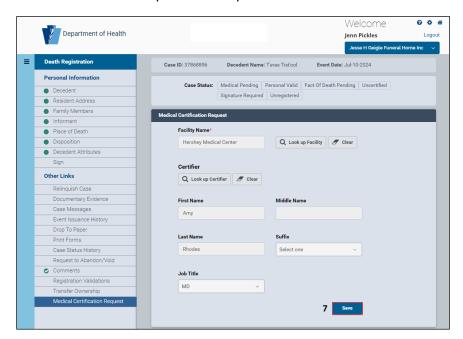




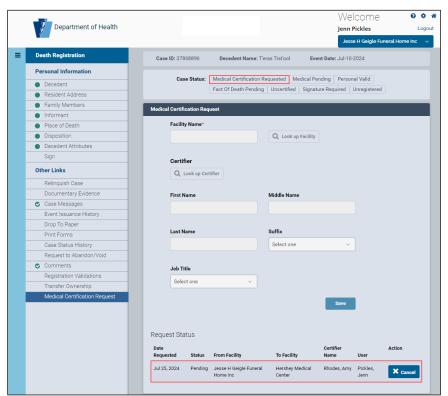
- 4. Adding a Certifier is optional. To add a Certifier, click the **Look up Certifier** button to open the Look up Certifier window.
- 5. Enter the last name of the Certifier you want to assign, then click the **Search** button.
- 6. Click the Select link to assign the Certifier to the Medical Certification Request.



7. Click the **Save** button to complete the request.



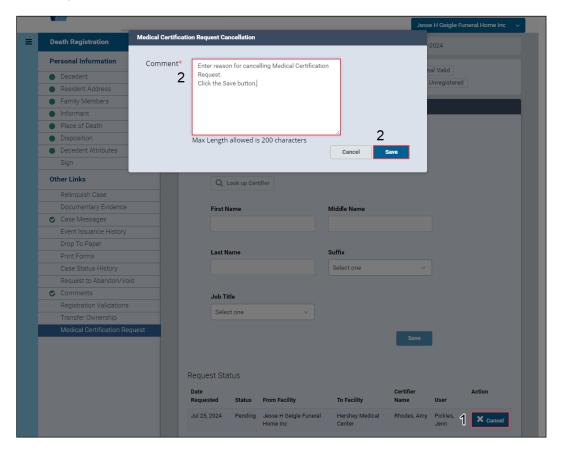
The case status displays *Medical Certification Requested,* and the request displays at the bottom of the page. The case displays in the Medical Certification Request – Sent queue and also displays in the Medical Certification Request – Received queue of the facility you assigned.





Cancelling the Medical Certification Request

- 1. To cancel the request, click the blue **Cancel** button at the end of the entry under the Request Status section in the Medical Certification Request.
- 2. Enter your reason for cancellation in the Medical Certification Request Cancellation window, then click the **Save** button.



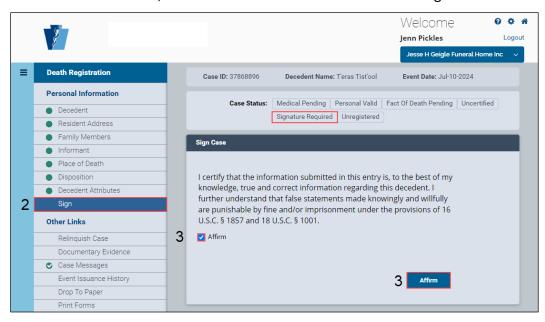
The request status shows as cancelled and no longer displays in any queues.

3. Funeral Directors

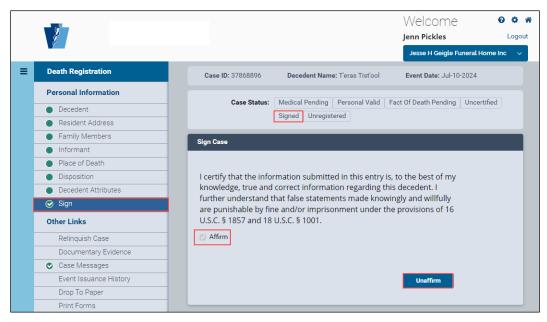
As a funeral director, you are responsible for signing death cases. You are also responsible for signing any amendments on cases. When you sign a case, it will have a case status of Signature Required and a Sign tab that you need to complete.

Signing a Death Case

- 1. Log into eVitals and locate the case you need to sign.
- 2. Click the Sign tab.
- 3. Select Affirm checkbox, then click the enabled Affirm button to sign the case.



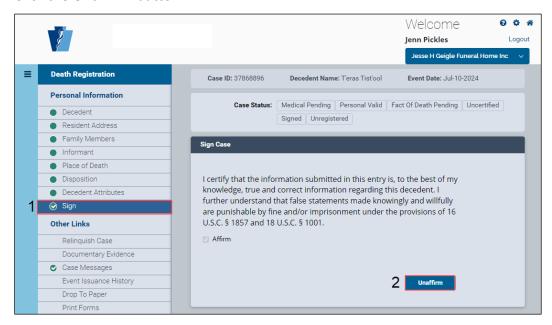
When you affirm a case, the Sign tab displays a green circle with a white checkmark in it, the case status changes to Signed, and the Affirm button changes to Unaffirm.



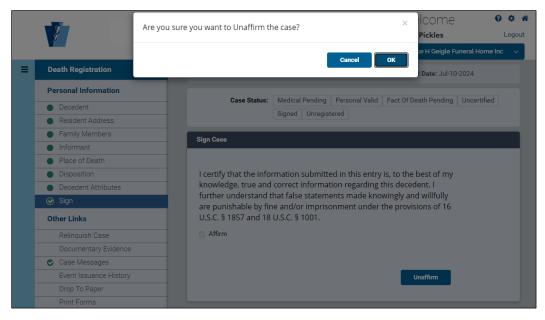


If you need to Unaffirm a case, reverse the steps to affirm a case.

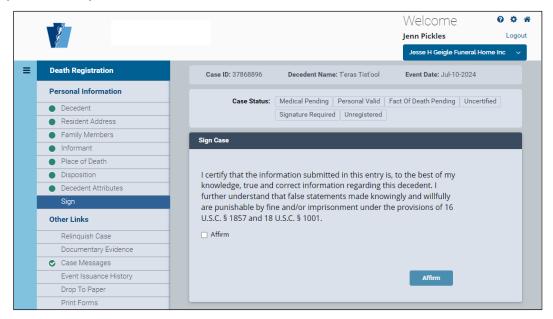
- 1. Click the Sign tab.
- 2. Click the **Unaffirm** button.



3. Click the **OK** button in the confirmation window that you want to unaffirm the case.



The case returns to an unsigned status. Case messages are entered indicating the signing and unsigning of the case. You can make the changes you need to the case then proceed to sign it when you are ready.





4. Amendments

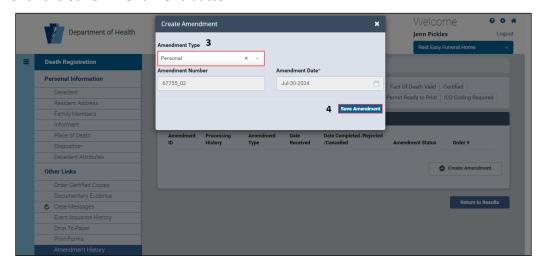
Any Funeral Home user can create an amendment however, only Funeral Home Directors can affirm and submit amendments. You will only be able to see amendments created by your facility in the amendments tab on your dashboard and in your amendments queues.

To create an Amendment

- 1. Click the Amendment History link.
- 2. Click the Create Amendment button.

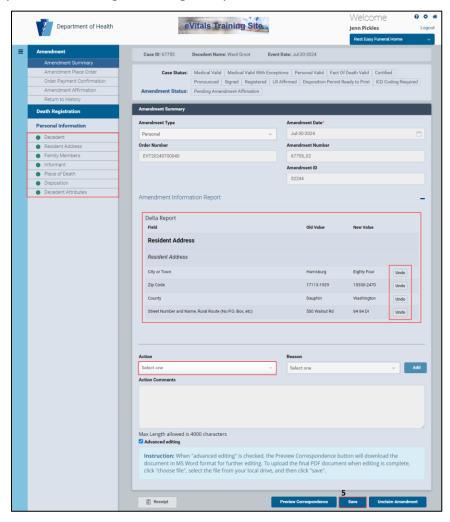


- 3. The only available Amendment Type from the drop-down list is Personal.
- 4. Click the Save Amendment button.



After saving your amendment, the Amendment Summary page displays. The changes you make on the Personal Information tab display in the Delta Report. The **Undo** buttons revert your changes. If you would like to cancel your amendment, select Cancel from the Action drop-down list and enter a reason for the cancellation.

5. When you finish making the changes to your amendment, click the **Save** button.



- 6. Next, click the Amendment Affirmation to display the Affirm Amendment page.
- 7. Select the checkbox to affirm the amendment, then click the Affirm Now button.





To Ordering Amended Death Certificates

If the Death Registry Unit approves your amendment, you can order an amended death certificate through the Amendment Place Order tab.

This section will be updated at a future date.

5. Duplicate Cases

Duplicate cases may occur when you create a case or when you save your existing case. There are three types of duplicate cases:

- Potential Duplicate
- Exact Duplicate
- Centralized Duplicate

When duplicate cases occur, the case status reflects the type of duplicate case and the case falls into its respective duplicate queue. You will not be able to sign your case until the duplicate issue is resolved.

NOTE: You can only resolve Centralized Duplicates by reaching out to the Death Registry Unit for assistance. There is no centralized duplicate queue they will fall into.

Duplicate Cases – Case Creation

When you create a case, eVitals searches in the background for existing cases that contain information that matches your search criteria. If eVitals finds cases with the same information, it displays one of two messages:

- Exact Duplicate Found A case was located that matched the criteria you entered into eVitals. A new case cannot be created. You must either review and select one of the cases that appear in the results, or you must contact the Death Registry Unit to resolve the issue. Review each potential match to determine if it is the new case you are trying to start. If not, you can then create a new case.
- **Potential Duplicate Found** A case was located that contains similar information as the criteria you entered to start a new case. Review each potential match to determine if it is the new case you are trying to start. If not, you can then create a new case.

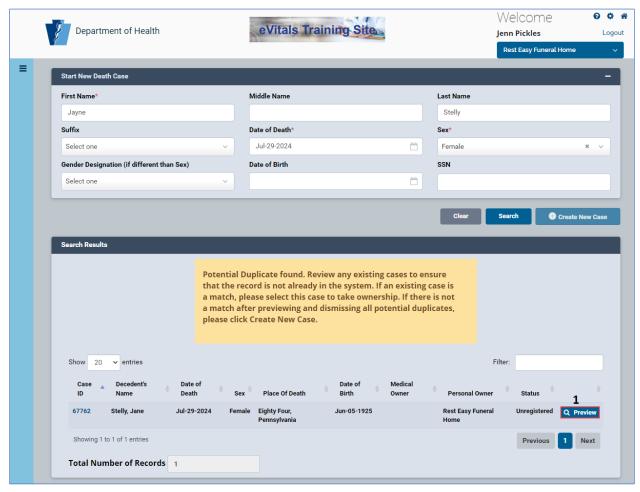
Potential Duplicate found. Review any existing cases to ensure that the record is not already in the system. If an existing case is a match, please select this case to take ownership. If there is not a match after previewing and dismissing all potential duplicates, please click Create New Case.

Exact Duplicate Found. A case matching the criteria has already been found in the system. Creation of new case is not allowed in this instance. Please contact the DOH Death Registry Unit if you feel this is an error.



Potential Duplicate Case Match at Case Creation

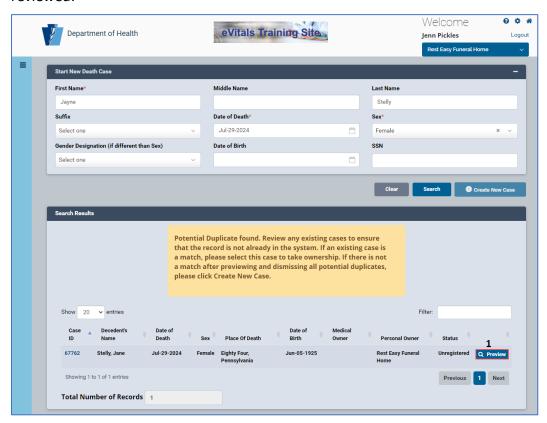
When you create a case and enter similar information to an existing case, eVitals displays a message that your case is a potentials duplicate match. You must resolve this message before you can continue.



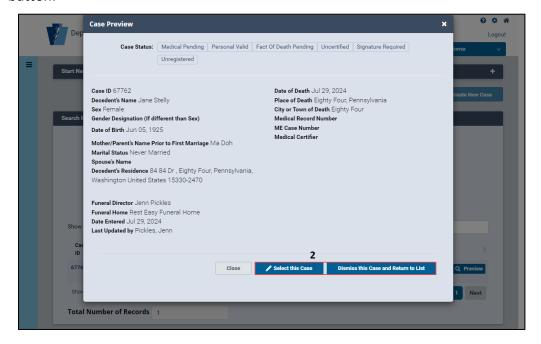
NOTES

Resolving a Potential Duplicate Case Match at Case Creation

In the Search Results section, click the **Preview** button of the matching case.
 Notice the **Create New Case** button is disabled. It will be disabled until all cases are reviewed.

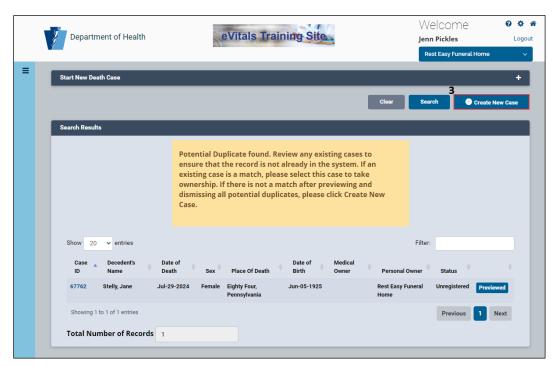


2. Review the case information in the pop-up window. If the case is what you need, click the **Select this Case** button, otherwise click the **Dismiss this case and Return to List** button.

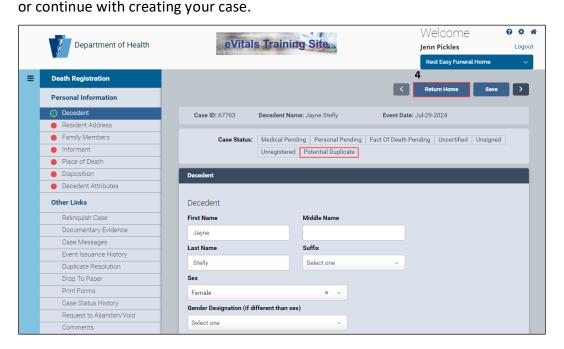




3. You must repeat this process if there are multiple cases in the list. When all cases are reviewed, click the **Create New Case** button to continue.



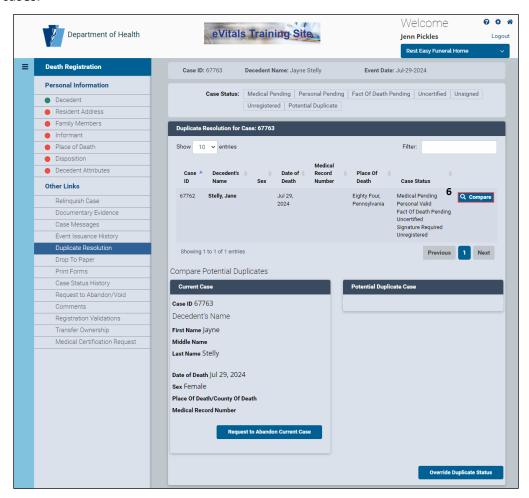
4. After making the changes to your case, the case status of Potential Duplicate displays. Your case cannot be signed until you resolve the duplicate issue. The case now sits in the Duplicate-Potential queue, waiting to be resolved. You can click the **Return Home** button to view the case in the Duplicate-Potential queue



5. Navigate to the Duplicate-Potential from the Queue List, then select your case from the queue.

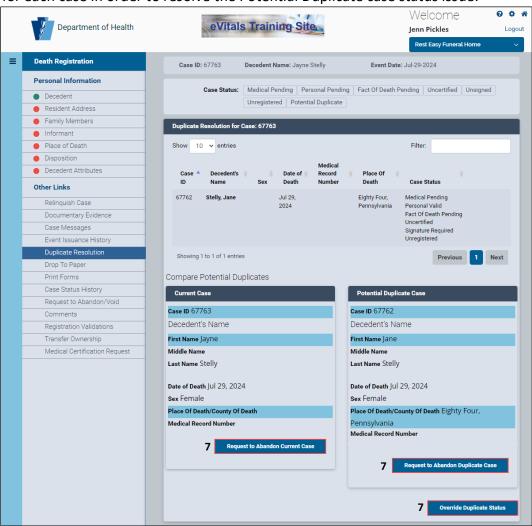


6. The Duplicate Resolution page displays with the potential duplicate cases in the center of the page. Click the **Compare** button to display the similar information between the cases.



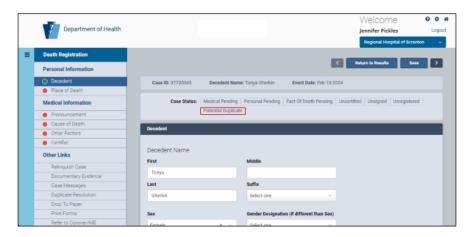


7. Review the highlighted information. If one of the cases can be abandoned, click the appropriate **Request to Abandon Current Case** button for the respective case. If both cases are unique and need to be kept, click the **Override Duplicate Status** button at the bottom and the Potential Duplicate case status is removed from both cases. If more than one case displays in the center of the page, you must repeat this process for each case in order to resolve the Potential Duplicate case status issue.



Potential Duplicate Cases – Saving a Case

A potential duplicate case occurs when you save your case with information that is similar to an existing case in your facility. eVitals flags your case with the Potential Duplicate case status and drops the case into the Duplicate-Potential queue for resolution. Your case cannot be registered until the Potential Duplicate case status is resolved.



NOTES



Resolving Potential Duplicate Cases

- 1. Navigate to the Duplicate-Potential queue and click on the duplicate Case ID.
- 2. Click the **Compare** button of the duplicate case you would like to view.
- 3. The current case and Potential Duplicate Case information displays at the bottom of the screen. Review the information between the cases and then:
 - a. If one case is a duplicate, click the **Request to Abandon Current Case** or **Request to Abandon Duplicate Case** button. The case is flagged for removal and the case status updated to External Request to Abandon.
 - b. If each case is unique, click the **Override Duplicate Status** button. The Potential Case Duplicate case status is removed.

If you would like to view the potential duplicate case, click the Select link at the end of the potential duplicate case row.

Exact Duplicate Case Match at Case Creation

When you create a case and enter the exact information as an existing case, eVitals displays a message that your case is an exact duplicate match. You cannot create a new case. You must preview the existing case and either use that case or contact the DOH Death Registry Unit for further assistance.



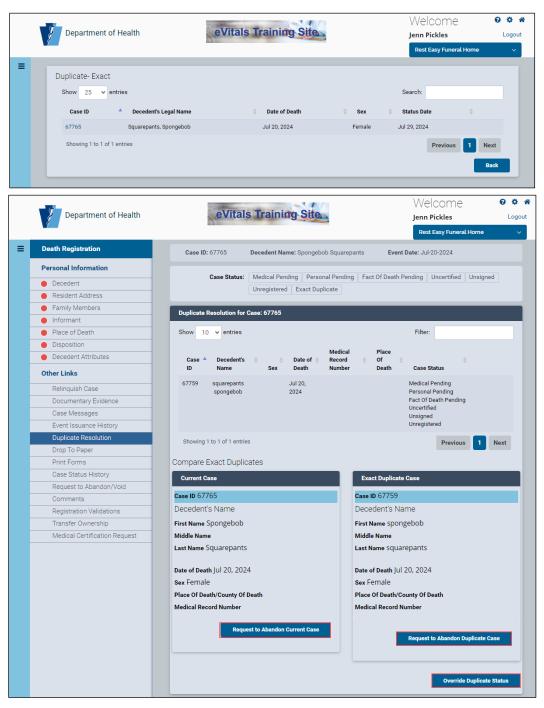


Exact Duplicate Cases – Saving a Case

An exact duplicate case occurs when you save your case with information that contains exactly the same information as an existing case at your facility. eVitals flags the case with the Exact Duplicate case status and drops the case in the Duplicate-Exact queue for resolution.

Resolving Exact Duplicate Cases

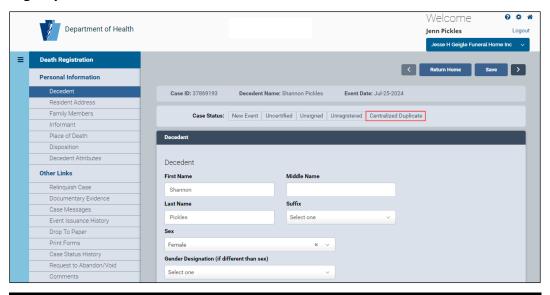
The steps for resolving Exact Duplicate cases are the same as resolving Potential Duplicate cases. Repeat the steps for <u>Resolving Potential Duplicate Cases</u> to resolve an Exact Duplicate case.



Centralized Duplicate Cases

Centralized Duplicate cases occur when you and a user at another facility create a case or save an existing case that contains details that are the same for a decedent. Two cases with the exact same information about a decedent trigger the Centralized Duplicate status. When this case status triggers, both of the cases fall into a queue that only the Death Registry Unit can access. You will not see this case in any duplicate case queue, nor will you be able to sign your case until the Centralized Duplicate case status is resolved.

If you create a case that triggers the Centralized Duplicate case status, please reach out to the **Death Registry Unit** to resolve the issue.



NOTE: As a reminder, you will not be able to sign your case until the Centralized Duplicate issue is resolved.

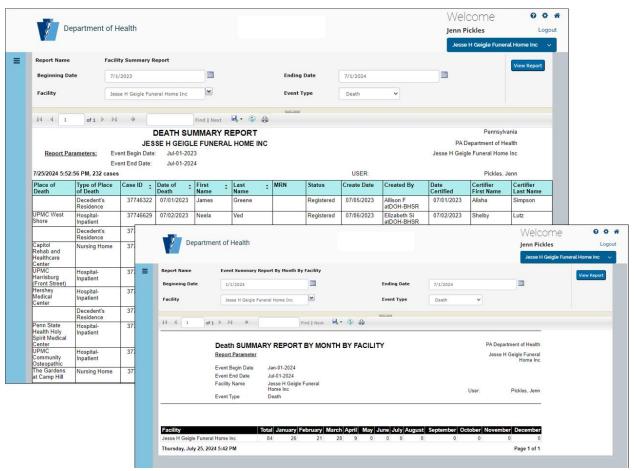


6. Reports

As an eVitals user, you have access to two canned reports to help manage productivity and case load at your facility. In addition to monitoring productivity, you can ensure that deaths are reported to the Department of Health in four business days.

Available Reports

- Event Summary Report by Month By Facility Displays a monthly count of how many cases were created at a facility.
- Facility Summary Report Displays facility case information such as decedent name and date of death, place, and type of place of death, who created the case and when, if it was certified, the date, and by whom.



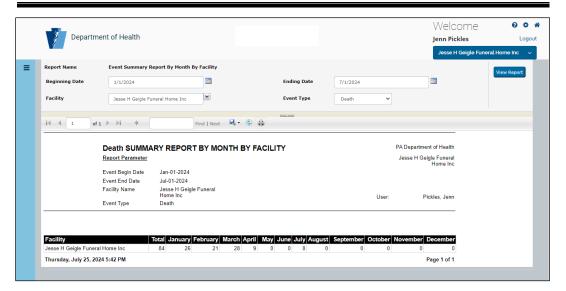
Generating the Event Summary Report by Month by Facility Report

1. Click the **Navigation Menu** button, then select Reports → Facility Reports → Event Summary Report by Month by Facility Report



2. Enter your beginning and end date parameters, then click the **View Report** button.

NOTE: The Facility defaults to the facility you are logged in under and the Event Type always defaults to Death.





Generating the Facility Summary Report

1. Click the **Navigation Menu** button, then select Reports → Facility Reports → Facility Summary Report



2. Enter your beginning and end date parameters, then click the View Report button.

NOTE: The Facility defaults to the facility you are logged in under and the Event Type always defaults to Death.

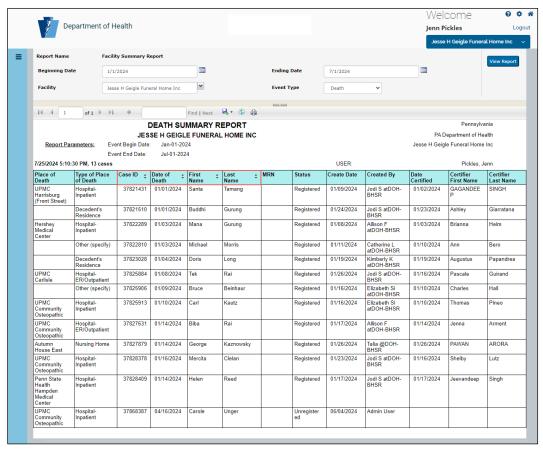


NOTES

Viewing the Report Results

When your results display, a toolbar displays above your report. You can use this toolbar to navigate your report if there are multiple pages or export your report to your desktop.

You can sort the Case ID, Date of Death, and First & Last Name columns in ascending or descending order by clicking the sort triangles in the column headers.



The toolbar



Use to navigate when there are multiple pages. You can use the arrows to navigate the pages or enter the page number into the field

Find | Next | Use to search for a word or phrase in your report

Use to export your report to a file on your desktop.

Use to refresh the data in your report.

Use to export to a PDF file for easy printing.



Generating the Event Summary Report by Month by Facility Report

1. Click the **Navigation Menu** button, then select Reports → Facility Reports → Event Summary Report by Month by Facility.



2. Enter your beginning and end date parameters, then click the **View Report** button.

NOTE: The Facility defaults to the facility you are logged in under and the Event Type always defaults to Death.

Viewing the Report Results

When your results display, a toolbar displays above your report. You can use this toolbar to navigate your report if there are multiple pages or export your report to your desktop.

The report shows how many cases were created at your facility regardless of their status for the timeframe you entered.

