TxEVER

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

Death Local User Guide

Version 1.0

06/19/2018

Revision History

Date	Description	Version of System	Author
06/19/2018	Initial Document	1.0	Valerie Hooven

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Important Terms

Medical Examiner: The Medical Examiner is a Medical Certifier responsible for investigating deaths where the manner of death is anything other than natural. The Medical Examiner may also assume responsibility for completing a death certificate in the case of an unknown or unclaimed body as well as any cases referred to them. In these cases Medical Examiner may act as a funeral director and also complete and verify the demographic information of the certificate. Justices of the Peace (JPs)/County Judges may act as Medical Examiners, in the certifying of the medical information on the record.

Local Registrar Users: The Local Registrar users may enter the demographic data entry section of a death record. Local Registrars can accept permit requests and issue death certificates.

Demographic Data Entry: Demographic data entry refers to the system process that supports data capture of the items on Demographic tabs (Demographic 1 through Demographic 5) defined as the responsibility of the Funeral Director or an entity acting as such.

Demographic Verification: Demographic Verification refers to the electronic equivalent of the funeral director signing the death certificate to indicate that the information completed by the funeral home is accurate. The demographic verifier is the person who reviews and verifies the demographic portion of the death certificate and as such is most often ultimately responsible for the completion and filing of the death certificate.

Burial Transit Permit: The Burial Transit Permit is the mechanism for the authorization of the disposition and transit of the deceased body. It is a printable form from the system.

Disinterment Permit: The Disinterment Permit is issued from the fee module and used in the disinterment of a body connected to a registered death record.

Funeral Director: The funeral director is a licensed professional responsible for completing, filing and verifying the demographic portion of the death certificate. Typically, the funeral director is the person who verifies the death record.

General/Back Data Entry: General Data Entry is the data entry process provided to authorized State users. It allows for the data entry of records that are fully paper by allowing the user access to all data entry fields.

Medical Certifier: This term refers to the Physician, Physician Assistant, Certified Nurse Practitioner, Justice of the Peace or Medical Examiner who is responsible for completing and certifying the accuracy of the medical items on the death certificate. Physicians are generally tied to a specific login location, but they may be tied to more than one login location.

It is standard procedure for Physicians to certify only those cases where the manner of death is natural.

Medical Certification: Medical Certification refers to the electronic equivalent of the Medical Certifier signing the death certificate to indicate that the information completed by the Medical Certifier is accurate. This includes cause of death and underlying causes as well.

Medical Data Entry: Medical Data Entry refers to the system process that supports data capture of the items on Medical tabs (Medical 1 through Medical 4) defined as the responsibility of the Medical Certifier.

State Users: This term refers to staff at the central State Office associated with the State Office

location. Related processes will vary based on the users' assigned roles.

Record Locking: It is assumed that the record will typically be completed with two distinct data entry processes: demographic and medical. Each will have its own 'release' point that is related to the respective "verification" (demographic portion) or "certification" (medical portion) component. Once a given portion has been certified or verified, that portion of the record is locked from further change by the respective participant.

Designation: The term designation relates to the process of identifying either the Medical Certifier office or the Funeral Home on the record so that the record becomes accessible to that entity for continued processing. Anytime the designated location is changed regarding a Medical Certifier, a new e-mail or text message will be generated as described for notification.

Filing on Behalf of: The Funeral Home of Record (responsible for filing the death certificate) may specify the name and address of an additional Funeral Service Provider on the record to capture the provider of additional services that might include Funeral Service and interment. This item is then available for printing on the death certificate as the funeral home of record.

Information captured in this form will be populated to the death record. Information is also displayed back on the Electronic Death Record (EDR) screen as display only fields.

Relinquish: Some scenarios will require that a Funeral Home that has become the owner of a record needs to Relinquish the record so a different Funeral Home can pick it up. This security driven process allows the current funeral home to be removed from the record making the record available to be picked up by a different funeral home. The record will no longer be in the work queue of the original funeral home.

The process will also be provided to users at the Local and State office from within General Data Entry if needed as an override.

Decline: This is a process to allow the Medical Certifier to decline the record in cases where the record does not actually fall under their jurisdiction. When a decline option is executed the system captures a reason as to why the case is being declined and a notification is sent to the funeral home regarding the record being declined. The Medical Certifier cannot change any medical data on the record until the record is accepted.

1   About the TxEVER Death Application

This user guide serves as a comprehensive reference for the Local functions of the Texas Electronic Vital Events Registrar (TxEVER) Death module.

1.1   Intended Audience

This user guide is for Local users who use the Web-Enabled Electronic Death Registration System to create and process death records for the State of Texas.

This user guide serves as a comprehensive reference for Local users who participate in the death registration by using the Local functions of the TxEVER Death Application.

2 System Overview

The **TxEVER Death** module is designed with intuitive interfaces for a seamless user experience. Mouse navigation, keyboard navigation, and Genesis' proprietary tools help streamline workflows.

2.1 Navigation, Data Entry and Tool Tips

2.1.1 Using the Mouse

Use the mouse to navigate the TxEVER Death module. Click various items (hyperlinked text and/or icons) on the menu to perform functions. The mouse can also be used to navigate from one field to another during data entry.

2.1.2 Using the Keyboard

Use the following keys to navigate through the **Death** module without using the mouse:

Tab Key: The **Tab** key is a Windows-standard-key that allows users to move from one field to another. When a field is selected, the field will be highlighted with a green background, blue background, and in some cases, a frame will form around the selected field to aid the user.

Shift + Tab: Reverses the tab order and moves focus back to the previous control.

Enter: Initiates the action selected. Pressing **Enter** is equivalent to double-clicking the mouse.

Left/Right/Up/Down Arrows: Used to navigate within a field or within a pick list. The **PgUp** and **PgDn** keys may also be used.

Down Arrow for Drop-down Box: Pressing the **Down Arrow** key in a selected drop-down box reveals the available selections in a list form. Use the **Up** or **Down** arrows to scroll through the list.

Type-ahead Logic: Type-ahead logic provides another way to save time by eliminating the number of keystrokes to pull up an item from a drop-down box. This feature enables the user to begin typing and the list will filter according to what the user types.

Space Bar: Used to toggle a check box item on or off.

2.1.3 Using Tool Tips

Tool tips display information revealing an icon's function. Hover the mouse cursor over the icon to display the tool tip.

2.1.4 Visual Cueing (Viz-e-Q©)

Visual Cueing indicates the status of each field using color-coded field cues. Users can change colors according to their own preferences using the **User Parameters Settings** option under **Tools/Utilities/User Parameters**.
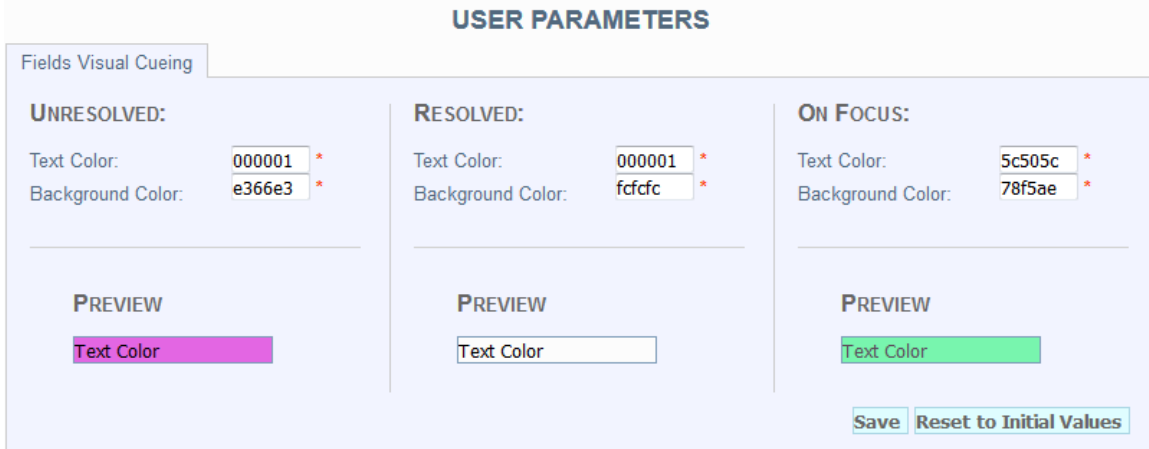
Figure 1: User Parameters Screen

2.1.5 Edit Checks (Fast-Fire©)

According to the National Center for Health Statistics (NCHS), a soft edit is defined as: "An edit that identifies and queries entries which are outside of the expected range, but which accepts out-of-range entries."

According to the NCHS, a hard edit is defined as: "An edit that identifies and queries entries which are outside of the expected range which must be corrected before the record can be filed."

An example of a hard edit in the **Death** module involves the date of death. If this date is greater than the system date, the following message will appear:
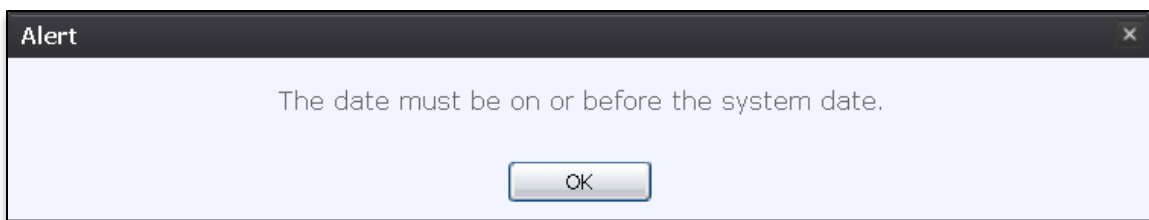

Figure 2: Hard Edit Message

2.1.6 Activity Bar
The **Activity** bar will appear at the bottom of every data entry screen in the **TxEVER Death** module.

Figure 3: Activity Bar

Information appearing on the **Activity** bar includes:

- **Field Name**: Displays the name of the field currently in focus.

- **Field Status**: Displays the status of the field currently in focus (*Resolved* or *Unresolved*).

- **Current Action**: Displays the action that is currently being performed on the record.

2.1.7 Field-level Help

Field-level Help provides specific help information related to the field selected, which is displayed in the **Field-level Help** frame between the data entry tabs and the data entry screen, as shown below. The content in the **Field-level Help** frame can be configured in **Screen Configuration** by a system administrator.

Figure 4: Field Level Help

2.1.8   System Level Help

System-level Help provides a searchable help index with various help topics pertaining to the functions and processes available within the **TxEVER** system. Go to **Help**/**Help** to access System-level Help.

2.1.9   About TXEVER Birth Application

About TxEVER Death Application details system information regarding the current version of the **TxEVER Death** module. To access this option, select the **Help/About** menu item.

2.1.10 Technical Support Resources

2.1.10.1 TxEVER Help Desk Technical Support

The TxEVER Help Desk is the main source of technical support for users of the **Death** module. To report an issue to the Help Desk, select **Report TxEVER Issue(s)** on the **TxEVER Splash Page** screen, as shown below:

Figure 5: TxEVER Splash Page

2.2 Login-System Access

The following technical requirements are needed to access the **TxEVER Death** module:

- Live Internet connection
- Widely used JavaScript enabled standard web browser (IE8+, Mozilla Firefox, etc.)

- Java runtime
- Adobe Acrobat reader for forms and letters
- MS Excel for accessing/running reports

If one or more requirements are missing, the **Death** module will ***not*** be accessible and/or will ***not*** function properly.

2.2.1   Accessing the TxEVER Death Module

1. Open the updated version of the web browser to establish a live internet connection.

2. Type the application address in the URL box or select from Favorites:
https://txever.dshs.texas.gov/TxEverUI/Welcome.htm

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

Figure 6: TxEVER Splash Page

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

5. The **Terms of Use Screen** will load, as pictured below:
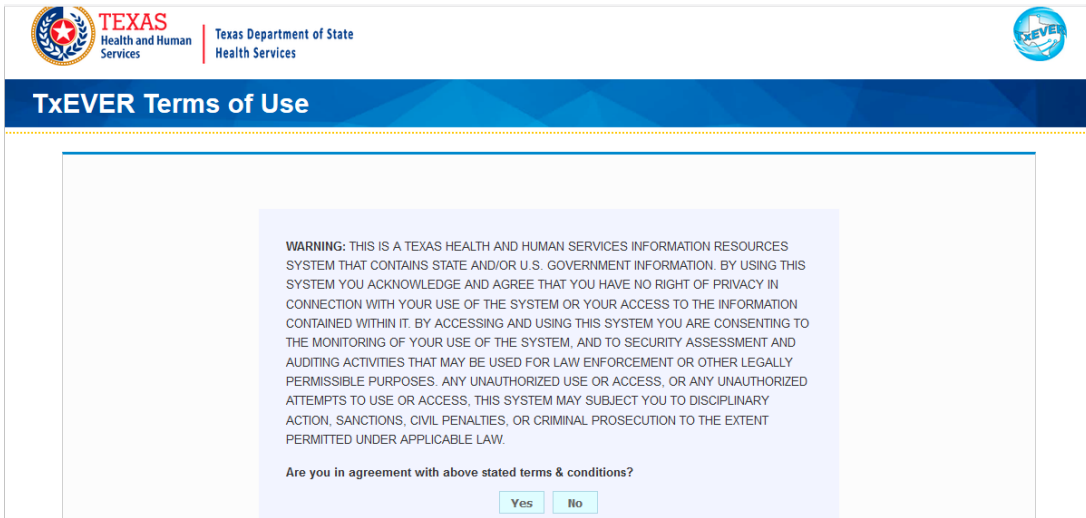
Figure 7: TxEVER Terms of Use Page

6. Click the **Yes** button to confirm agreement with the terms of use.

   a. Click the **No** button to be returned to the TxEVER splash page.

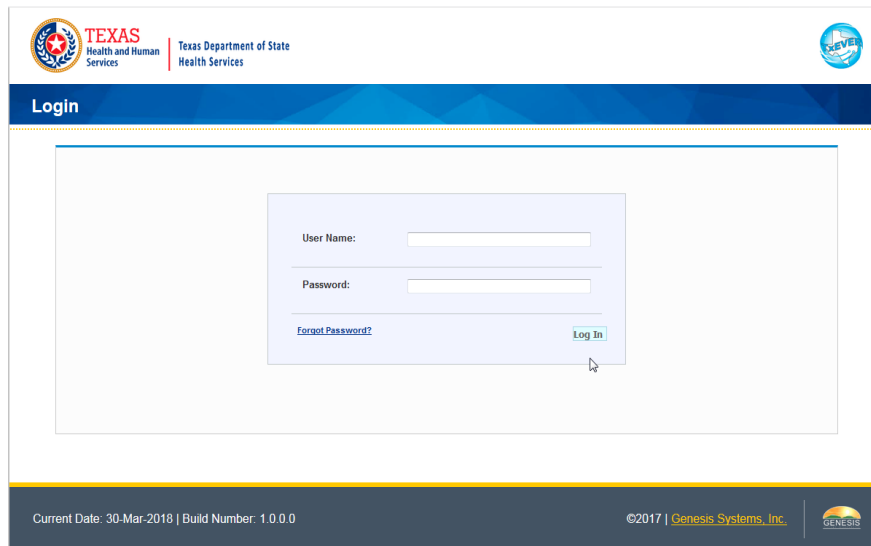7. The TxEVER login screen will display:

Figure 8: TxEVER Login Screen

8. Enter in a user name and password and click the **Log In** button.

9. The Select Location window will be displayed.
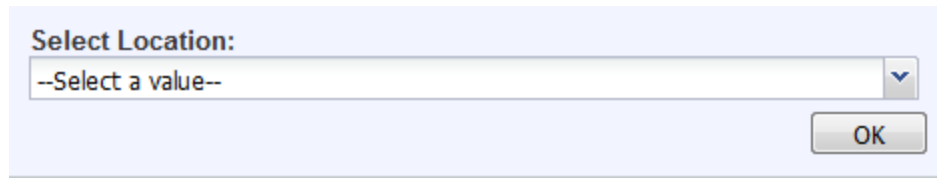
Figure 9: Select Location Window

    a. Select the appropriate facility from the available choices in the drop-down list.
    b. If the user works at multiple physical locations, the drop-down list will contain all physical locations assigned to their user account.
    c. Click **OK**. The main page of the **TxEVER** application will be displayed:

Figure 10: TxEVER Main Page

    Note: The highlighted tab at the top of the screen determines what menus and sub-menus will appear.

10. Click the **Death** tab to go to the **Death Home** screen.

2.2.2 Session Time-Outs

If the system has not detected activity within 20 minutes, the session will time out. Two minutes prior to a session time-out, the system will issue the following warning message:

Figure 11: Timeout Warning Message
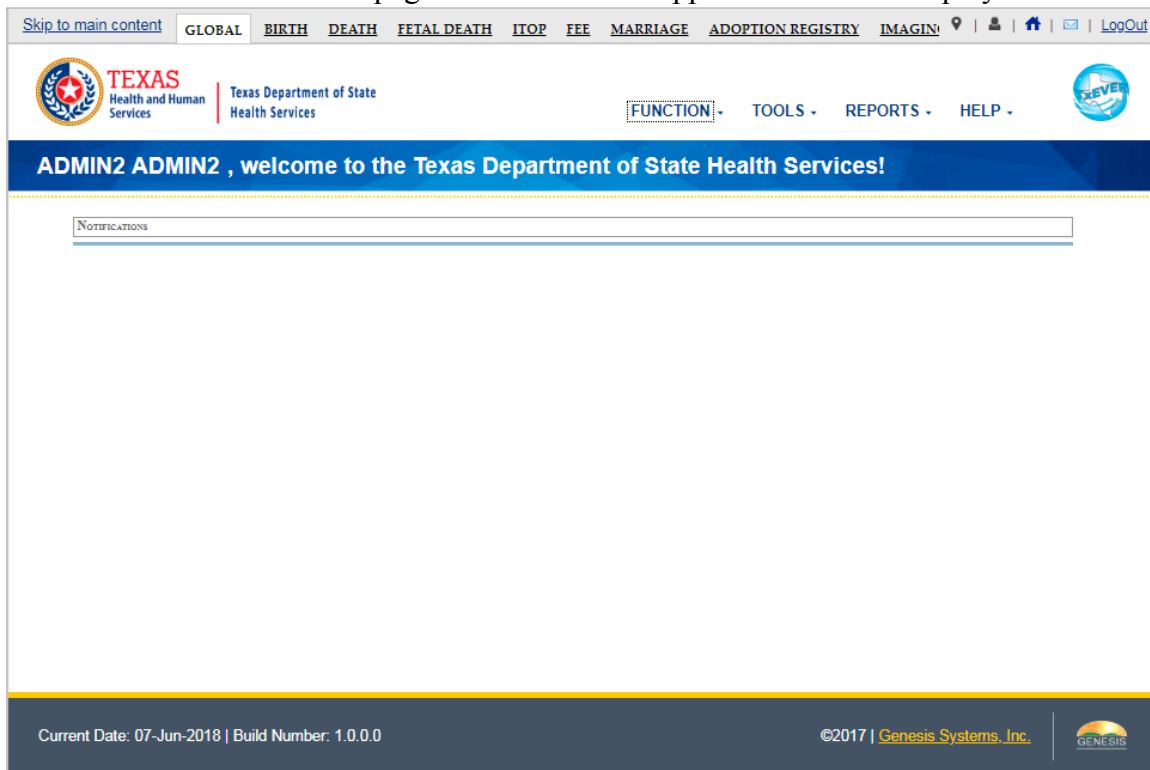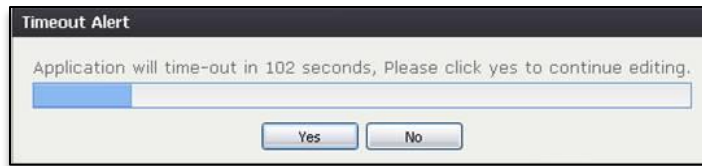
If the system appears to stop responding (i.e., no choices in some pick-lists, cannot save a record, cannot retrieve a record, etc.), the session has likely timed-out. The following message will appear when a timeout occurs:
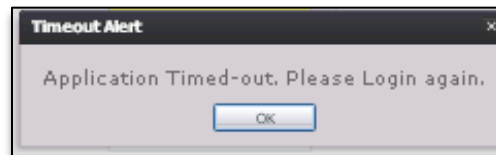
Figure 12: Timeout Alert Message

To resume working after a session timeout, exit the system and log on again. Frequently saving work will help to prevent session timeouts. For security purposes, log out of the system if you will not be using it for an extended period of time and then log on again when needed.

2.2.3   About Passwords

Users are assigned a temporary password when they sign up to use the system. This temporary password must be changed upon the user's first login to the system.

Figure 13: Change Password Screen

The new password must initially meet all of the following requirements, although a system administrator may change password requirements at any time:

- Must have at least one numeric character

- Must contain uppercase and lowercase characters

- Must contain at least one special character (i.e., #, $, !, @).

- Must be a minimum of 8 characters long

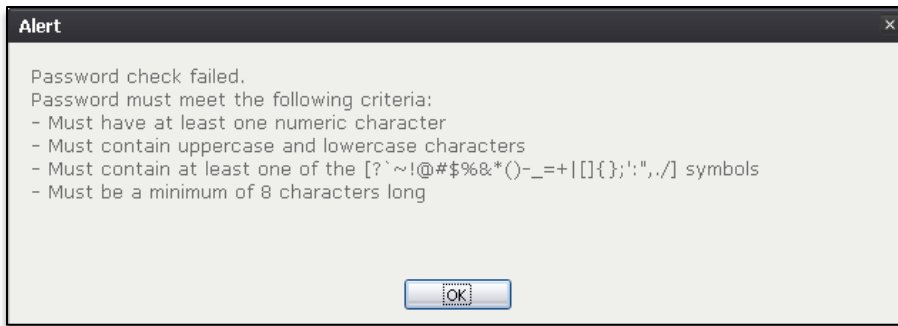If the new password does not meet these requirements, the message below will appear:

Password check failed.
Password must meet the following criteria:
- Must have at least one numeric character
- Must contain uppercase and lowercase characters
- Must contain at least one of the [?`~!@#$%&*()-_=+|[]{};':",./] symbols
- Must be a minimum of 8 characters long

Figure 14: Password Check Failed Alert Message

Passwords expire at intervals determined by system administrators. When a user attempts to log on with an expired password, they will be alerted by the system.

A user may also change a forgotten password at any time by clicking the **Forgot Password** button located on the **Login** screen as shown in step 2 of **Accessing the TxEVER Death Module**.

2.3   Log Out of the System

Exit or log out of the **TxEVER Fee** module using one of the following methods:

1. From the **Main Menu**, select **Function/Exit System**.

   OR

2. Click **Log Out**.

Note: Clicking the **[X]** in the upper right corner of the browser window will close the system, but it is recommended that you exit by clicking **Logout** or the **Exit System** menu option instead. This will ensure that the session closes in order to prevent possible problems when logging on again.

3   General Data Entry

General Data Entry includes all data items on the death record, including cause of death information. **General Data Entry** is the only step in the In-House data entry and the workflow will be driven by a batch of paper documents received from funeral homes or medical certifiers.

3.1   Access Death Registration Data Entry

In order to access the initial **Death Registration Data Entry** screen, go to **Death/Function/General Data Entry**.

3.2   Start and Save a New Record

The **Death Registration** functionality allows authorized users to create/initiate a birth record within the **TxEVER Death** module.

1.   Select the **Death/Function/General Data Entry** menu item to initiate a new birth record.

Figure 15: General Data Entry Initial Load

The **General Data Entry Initial Load** screen will appear.

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

Figure 16: New Record Screen

Field Name	Description
Date of Death Type	Select a record type from the dropdown field
Date of Death	Enter Date
SSN or EDR Number	Enter either the SSN or the EDR Number
Record Type	Select a Record Type
Last Name	Enter Text
Gender	Select a Gender Option

3. Minimally, enter values into all fields listed above and click **Save** or select the **Record/Save** menu item. The application will perform a search for potential duplicate records.

   The following message will appear:

Figure 17: New Record Creation Confirmation Message

4. If the user selects **Cancel**, the record will not be saved.

If the user selects **OK,** a new record will be created.

5. After a new record is created, proceed with medical data entry by completing the information requested on Medical Tabs 1 – 4. See Medical Data Entry Topics for more details on how to complete the record.

   The application will perform an automatic SSN Verification and provide response codes, instructions and notifications to the user, as applicable.

6. Click on **Save Record** to save.

3.3 Pick Up a Record

The **NEW Record** function allows authorized users to create/initiate a death record within the **TxEVER Death** application.

1. Click on the **New Record** icon or select the **Registration/New Record** menu item to initiate a new death record.
2. The New Record screen will appear:

Figure 18: New Record Screen

Field Name	Value Required
Date of Death Type	Select a Date of Death Type from the dropdown list
Date of Death	Enter Date
SSN or EDR Number	Enter either the SSN or the EDR Number
Record Type	Select a Record Type
Last Name	Enter Text
Gender	Select a Gender Option

3. Minimally, the user must enter values into all fields listed above and click **Find Record**.
4. If a match is found at the same location, the following message will appear:
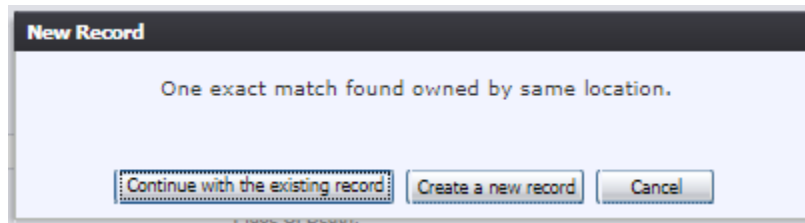

Figure 19: Duplicate Record Message

    a. Select **Continue with the existing record** to open the existing record and continue editing.

    b. Select **Create a new record** to start a new record with the same information.

5. If the record belongs to another location, a Local user can take ownership of a record owned by another location. The following message will appear:

Figure 20: Take Ownership Message

    a. Click **Take Ownership** to take ownership of the record and begin editing the record.
    b. Click **Cancel** to cancel the new record.

6. After a record is opened, proceed with data entry by completing the information requested.

The application will perform an automatic SSN Verification and provide response codes, instructions and notifications to the user, as applicable.

3.4 Search for a Record

Searching for a record in the application can be accomplished using the following options:

- **Search** screen
- Work queue search

3.4.1 Search Screen

1. Click the **Search** icon 🔍 or select the **Record/Search** menu item.

The **Search Record** screen will be displayed, as shown below:

Figure 21: Death Search Screen

2. Enter all available information regarding the record.

   ✓ **Tip**: Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.

   ✓ **Tip**: Along with a name, including the year of death (which can be entered as a series of 00s followed by a year- i.e. 00/00/2012) and gender and other information will reduce the number of matches that are returned and cause faster search returns.

   ✓ **Tip**: Choosing 'Soundex' still requires the user to enter at least the decedent's year of death. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound familiar as well.

3. Click **Search**.

Records that match the search criteria will populate the grid in the lower half of the screen, as shown below:

Figure 22: Death Search Screen Populated with Results

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

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

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

   The record and its information will appear on the screen as an active record for additional review and/or processing.

3.4.2 Work Queue Search

The work queue in the **General Data Entry** process will contain the following:

- Death records associated with the State login location that still require some type of action.

- The list in the work queue will be sorted by the decedent's date of death and will

display the newborn's last name, newborn's first name, and newborn's date of birth.

To use the Work Queue Search:

1. From the drop-down list, set the filter for the appropriate record type.

   Options include:

   - **All Unresolved**: All records that have been started but the information is not yet complete.

   - **Drop to Paper**: All records that have been dropped to paper.

   - **Pending Verification**: All records that are pending verification.

2. From the list, select the appropriate record by clicking on it or, start typing decedent's last name into the field.

Figure 23: Unresolved Work Queue

The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional review and/or processing.

3.5 Unresolved Fields List

Depending on the type of record, many actions need to be performed before a record is ready to be released to the state for further processing. To check if all data items are complete, use the **Unresolved Fields** list to identify areas that require some sort of action before the record is resolved. The **Unresolved Fields** list displays individual data fields that need to be completed for a specific record before it can be resolved.

1. Retrieve an existing record.

2. On the **General Data Entry** screen, click **Unresolved/StakeHolders** at the top to open the **Unresolved Fields** list.
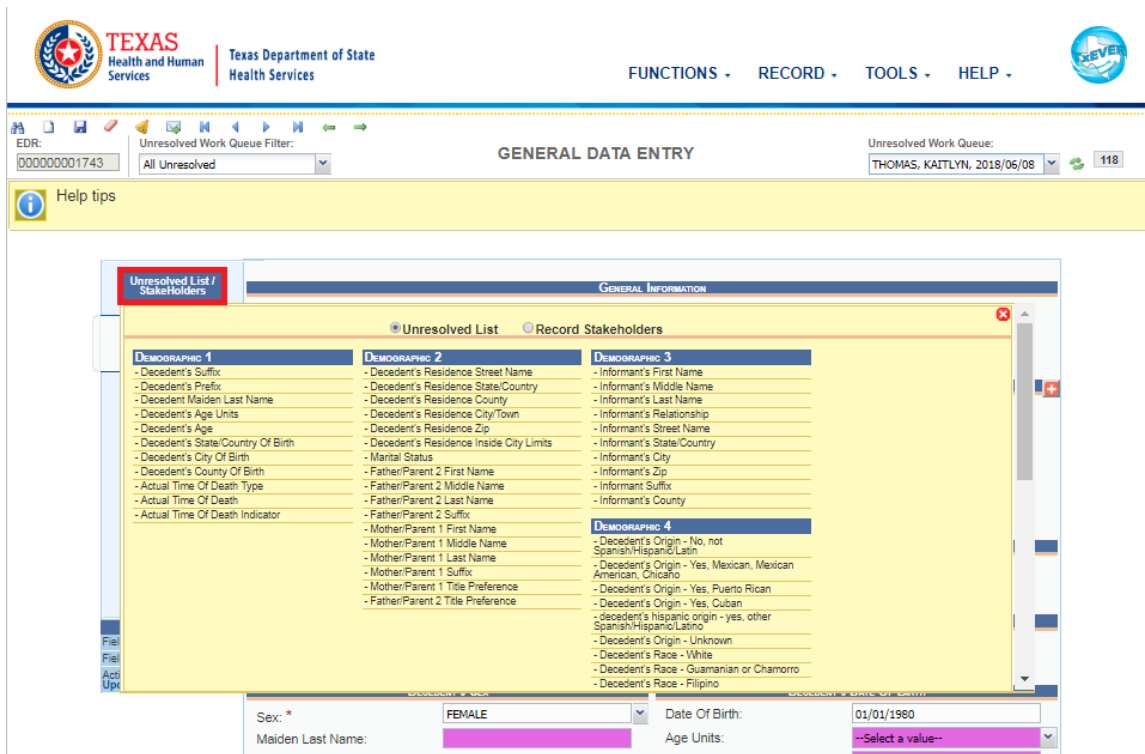
Figure 24: Unresolved Fields List

3. To be directed to a particular unresolved field, click the field's link. The application will navigate to that particular field directly so that it may be resolved.

4. Click **Unresolved/StakeHolders** again to close the list and return to the data entry screen.

3.6 Canceling Changes

Changes made to a record since it was last saved in **General Data Entry** can be canceled.

To cancel changes made to a record:

1. While a record is on screen, select the **Record/Cancel** menu option or the 🖊 button. The following message will load:
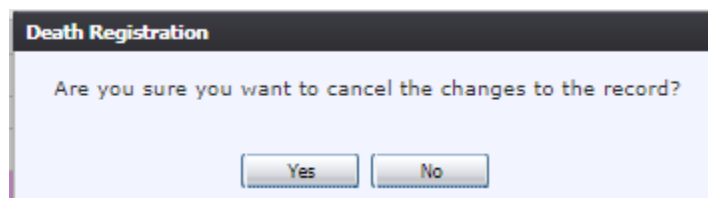
Figure 25: Cancel Changes Confirmation Message

2. Click **Yes** to confirm cancellation of the changes made to the record.

The changes will be canceled and the record will be restored to its previously saved state.

3.7 Update a Record

To update a record:

1. While a record with unsaved changes is on screen, select the **Record/Save** menu option, or click the **Save** button 💾 .
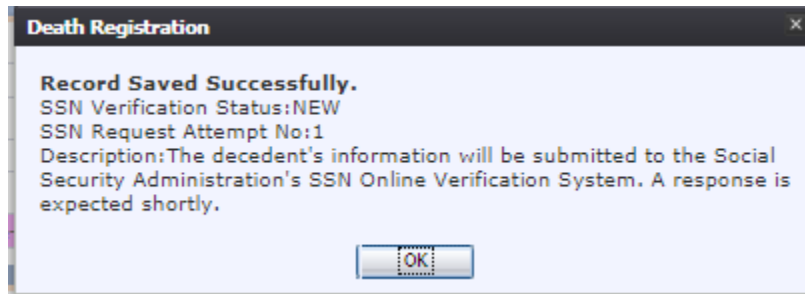
2. The message below will load:

Figure 20: Record Update Confirmation Message

3. All previously unsaved changes made to the record will be saved.

3.8 Abandoning a Record

Any user can choose to abandon a record up until the record is released and assigned a State File Number (SFN). If a record is released, a State user can void the record through **Legal View**.

To abandon a record:

1. Select the **Record/Abandon** menu item. The following message will appear:
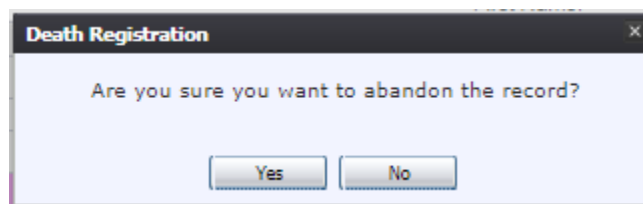

Figure 27: Record Abandon Confirmation Message

2. Select **No** to cancel the action and the user will return to the record. Select **Yes** to continue the **Abandon Record Process.** Provide a reason for abandoning the record in the comment box:
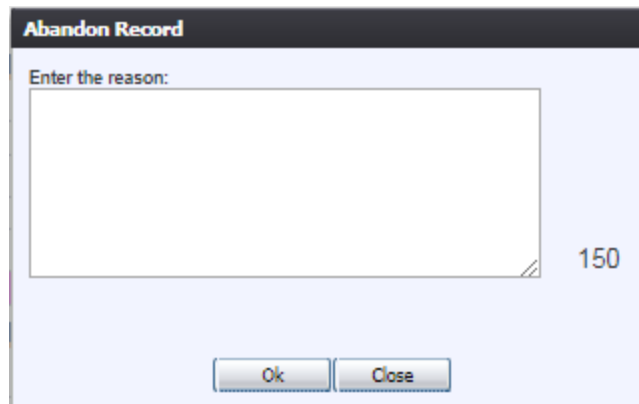
Figure 28: Abandon Record Comment Screen

3. After providing a comment and clicking **OK**, the following message will appear and the record will not appear in the Unresolved Work Queue any longer:
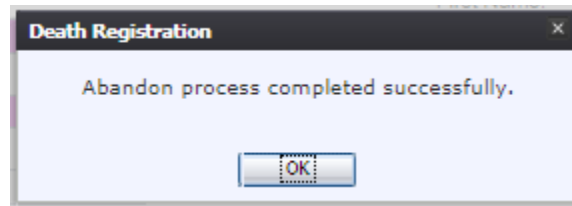

Figure 29: Abandon Completion Confirmation Message

3.9 General Data Entry Topics

3.9.1 Presumed Fields

There are some data fields that are called **Presumed**. The next few paragraphs describe the reason why they are labeled so.

Typically, data items captured on the death record fall under distinct responsibility of either the Funeral Director or the Medical Certifier. For functional reasons, a few items need to be captured within both the medical and the demographic data entry processes. This is required to support record identification and matching when the record is started by one entity and completed by the other.

Several fields of this nature have been defined. They share the characteristics that will cause them to be included in both medical and demographic data entry. These data items will be stored on the record twice with one set being referred to as 'presumed' and the other set referred to as 'actual'. The actual items will be those completed by the entity that is in fact responsible for the item. The presumed set will be entered by the entity that is not responsible but from whom the item is needed for record identification, matching, or other functional purposes.

The complete list of fields that will be captured to create a NEW record is as follows:

✓ Decedent's Name

- ✓ Type of Place of Death
- ✓ Place of Death
- ✓ County of Death
- ✓ Date of Death Type
- ✓ Date of Death
- ✓ Decedent's Social Security Number (if known)
- ✓ SSN Missing Variable (if SSN not known)
- ✓ Date of Birth
- ✓ Gender
- ✓ Record Type (Identified/Unidentified)
- ✓ EDR Number (generated by the system)

A clear example would be the Date of Birth. Ownership of this item would rest with the funeral director so the funeral director actually provides the Date of Birth. The medical certifier would provide the Presumed Date of Birth.

The Decedent's Name is owned by the funeral director. As a result, the actual and presumed names are not required to be the same.

3.9.2 Double Data Entry

Certain fields (such as Decedent First Name) within the General Data Entry screen will require that the user enter the value into the main data entry screen and then confirm the entered value by entering it again in a separate data entry interface. Fields that require double data entry will present users with the following screen when the user tabs off the field:
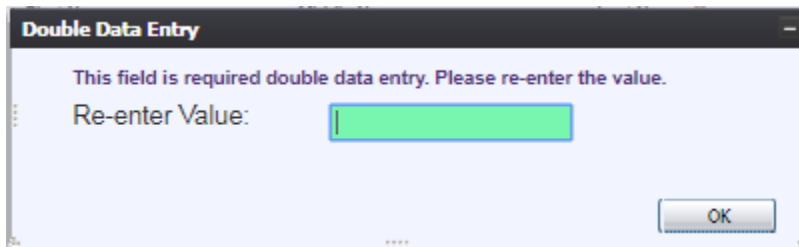
Figure 30: Double Data Entry Screen

Enter the value again and click the **OK** button to close the Double Data Entry screen. If the value entered in the Double Data Entry screen matches the value entered on the main data entry screen, the user will be moved to the next data field. If the values do not match, the following message will appear:
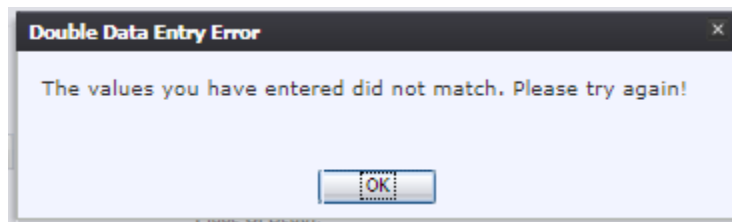
Figure 31: Double Data Entry Error Screen

Click **OK** to close the message and return to the data entry screen. The value entered into the field will be cleared and the double data entry process will be required again.

3.9.3   Pick List Navigation

The **Place of Death** fields illustrate the concept of drop-down menus. Refer to the examples below to quickly retrieve entries and expedite data entry.
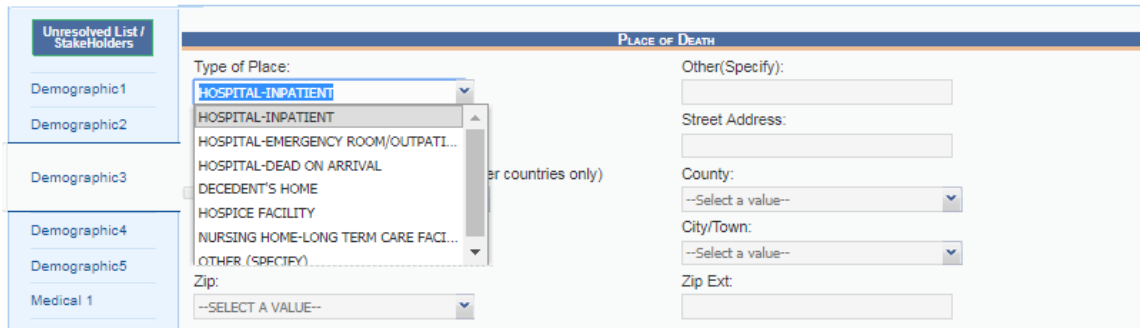

Figure 32: Place of Death Fields

1. Set focus on the **Type of Place of Death** field by clicking in the field. Open the drop-down list by clicking on the arrow symbol or by pressing the down arrow key on the keyboard.

    - Selecting from the drop-down is the standard approach when unfamiliar with the entries. Instead of opening the list, the user can also start typing the first letters of the entry to retrieve it.

2. After selecting an item from the pick list, press the **Tab** key to advance to the next field. Mandatory fields and pick lists will change based on what item was selected for **Type of Place**.

3.9.4   Screen Tab Navigation

When the last field on the **Demographic 1** tab is resolved the next field that needs a response is on the **Demographic 2** tab.

Pressing **Tab** from the final field on the **Demographic 1** tab automatically advances the focus to the **Save** button at the bottom of the screen and the user can press **Tab** one more time and then press **Enter** on the keyboard to load the **Demographic 2** tab. The user can also navigate to various screen tabs by clicking on them with a mouse.

3.9.5   Place of Death Information

Once a type of place is selected, the address fields for a listed hospital are automatically populated. These types of fields are retrieved from the database and are referred to as bypassed and disabled. The address information of a given facility cannot be directly edited on the screen.

Figure 33: Place of Death Information

3.9.6 Certifier Profile

Certifier type and profile is based on the login profile of the user who originally initiated or picked up the record. The address fields are retrieved from the database and cannot be directly modified on the screen. However, the certifier name may be modified, which will cause the address fields to change.

Figure 34: Certifier Profile Screen

3.9.7 Ethnicity and Race Fields Properties

The **Ethnicity** field allows one selection from the available options. Use the mouse or the **Spacebar** key to select an option. Use the **Tab** key and the **Shift + Tab** key to navigate to the desired choices and the **Spacebar** or the mouse to select or de-select.

To change the choice, the selected choice must first be unchecked by clicking on it again and then selecting a different choice.

Figure 35: Ethnicity and Race Fields

Race fields allow multiple choices. Click as many choices as needed.

3.9.8   AKA Names

The **AKA Name** fields are among the first ones encountered once the record is initiated by entering data on the **New Record** screen. **TxEVER** contains the ability to capture multiple sets of decedent's AKA (Also Known As) name fields (First, Middle, Last, Suffix) if they are available. To add an AKA Name:

1. Click on the **Add/Edit AKA Names** button (located next to the title bar of the Decedent's Legal Name fields section on Demographic 1 tab).

Figure 36: Add AKA Names Button

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

Figure 37: AKA Names Entry Field

3.9.9 Death Age Entry

Decedent's Date of Birth fields require entry in the Age Unites and Age fields to determine record processing sequence.

1. With the mouse, click on the **Date of Birth** field and use the **Tab** key to advance to the **Age Units** field on the **Demographic 1** tab

Figure 38: Decedent's Date of Birth Fields

2. If you haven't entered decedent's Date of Birth already, do so now, and press **Tab** to advance to the Age Units field.
3. In the Age Units field, use the mouse to click on the down arrow icon or use the **down arrow** key on the keyboard to open the list and select the appropriate age unit (years, months, days, hours, minutes).
4. Enter the decedent's age at the time of death. If the entered value does not coincide with the value calculated by the system by taking into account the birth and death dates, the following screen will be displayed:

Figure 39: Decedent Date of Birth Crosscheck Screen

5. Correct the age and click **OK**. Use the **Tab** key to advance to the next field.

3.9.10 Funeral Facility Profile
In General Data Entry, the funeral facility will need to be selected from the **Facility Name** combo box. If a selection is made from the pick list, the address fields are retrieved from the database and cannot be directly modified on the screen.

Figure 40: Funeral Facility Profile Fields

3.9.11 Funeral Service Licensee

This is the individual associated with the Funeral Location who has demographically verified the record as the funeral director.

This is a drop-down type-ahead pick list that will contain only funeral directors associated with the Funeral Location on the record.

3.9.12 Additional Funeral Service Provider

Additional Service Provider field is associated with trade calls. These are cases where the funeral home of record (the funeral home responsible for filing the death certificate) is not providing all of the services for the family and the names of both funeral establishments need to be captured.

Example: if Jones Funeral Home is entered as the Additional Funeral Service Provider and Johnson Funeral Homes Inc is the funeral home that is responsible for filing the death certificate, the name of the additional funeral home will be entered in the Additional Funeral Service Provider field.

The license number of the funeral home that files the death certificate will print on the death certificate.

3.9.13 Certifier Fields

For In-House purposes, the certification has already taken place and the Certifier has already been identified on the paper document. However, a medical certifier office/practice will still need to be identified on the electronic record.

Selecting the medical certifier will also populate the Office/Practice on the record. Selecting a medical certifier will not cause an email message to be sent to the medical certifier when the data entry is performed in General Data Entry.

1. Retrieve a record that needs designation of a Medical Certifier using the **Search Screen** or through the **Work Queue**.

Note: Certain fields must be resolved before the medical certifier designation process can occur. If these fields are not completed, an alert message will appear.
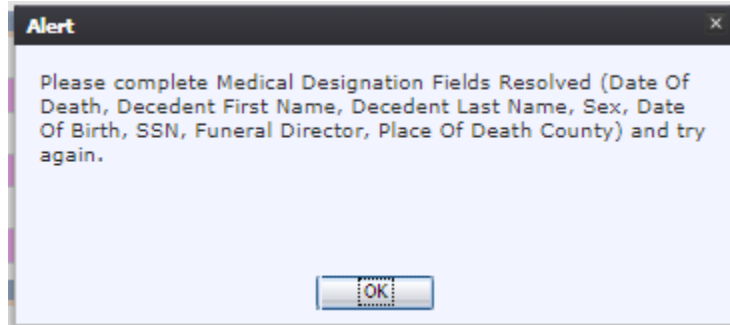

Figure 41: Medical Designation Alert Message

2. Navigate through the data entry screens to the Medical 4 data entry screen and select a value for the Certifier Type field. This will enable the Certifier Search and the **Search Certifier** button will become visible on the screen. Click the **Search Certifier** button.

Figure 42: Certifier Search Fields

3. The Medical Certifier Search Screen will load:

Figure 43: Certifier Search Screen

4. Enter information into all required search fields and then click **OK**. The search results grid will load all certifiers that match the entered search criteria.

Figure 44: Certifier Search Screen Completed

5. Select the desired medical certifier by clicking the associated row in the search results grid. The Certifier Search Screen will close and the medical certifier's information will populate in

the medical certifier fields and the fields will disable.

3.10 Record Comments

Certain events that take place, such as when a coroner declines a designation or a referral, require that a comment be entered. These comments are stored and can be viewed in a grid on the Comments tab of the data entry screens.
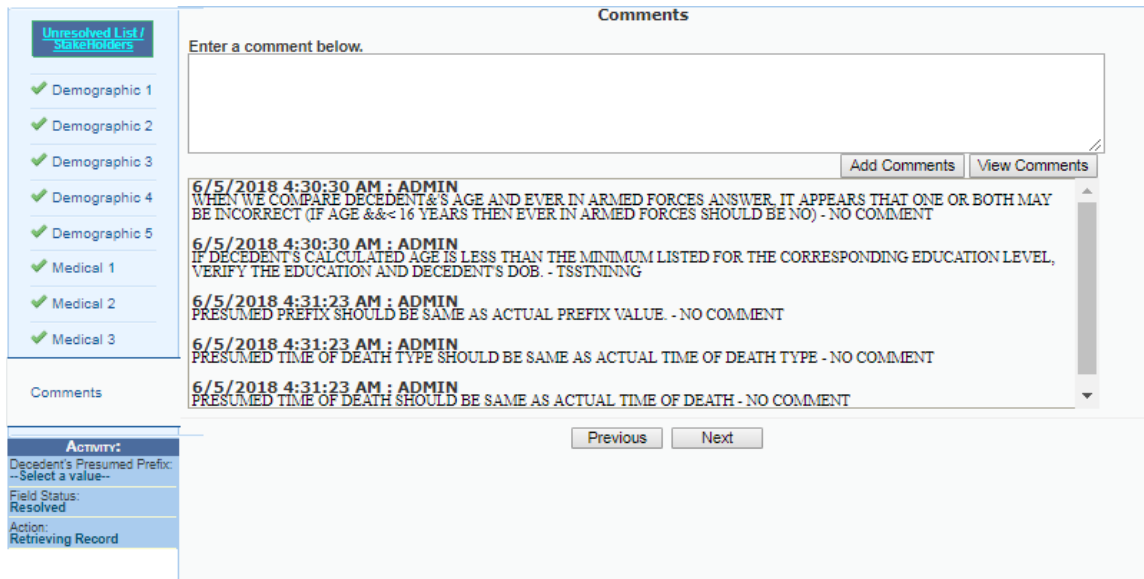

Figure 45: Comment Log Screen

The following information regarding each comment will be stored:

- Action that required the comment
- User logged in when the comment was entered
- Date and time the comment was entered
- Text of the comment (600 characters)

Comments may be entered or viewed by clicking on the **Comments Tab** in General Data Entry.

3.11 SSN Verification

Records filed entirely on paper or where the demographic verifier was not participating may require that the SSN Verification process take place. The transaction will be sent when all related data items are resolved as operator continues to edit the record. The EDRS will perform an automatic SSN Verification and provide response codes, instructions and notifications to the user, as applicable.

Note: after entering initial record data and saving the record, you may need to wait several minutes to get a Verification Status response and retrieve the response by again saving the record at that time. Saving the initial record data and later returning to complete the record by accessing the record from the Unresolved Work Queue will also ensure that the SSN Verification Status is retrieved and saved on the record.
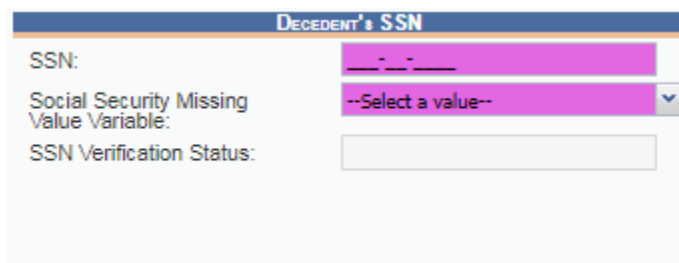
3.11.1 Automated Process

The process is a behind-the-scenes process that is automatically triggered by data entered in the Demographic Data Entry when the following fields have been resolved and saved:

- ✓ Decedent's Last Name
- ✓ Decedent's First Name
- ✓ Decedent's Middle Name
- ✓ Decedent's Date of Birth
- ✓ Decedent's Gender
- ✓ Decedent's Social Security Number
- ✓ State of Death

The system looks for results of the request (if necessary) when the record is saved, when it is again retrieved, and when the verifier attempts to verify the record. The demographic data entry screen contains an indicator of the SSN Verification Status for the record.

Up to five (5) separate attempts can be made to verify-re-verify the SSN. The system will count the attempts made and if three (3) or more attempts are made on the same record, an entry will be made in the system audit log. Multiple attempts on the same record could be an indicator that various names and/or Social Security Numbers are being entered to 'fish' for matches.

Figure 46: Decedent's SSN Verification Fields

3.11.2 Response Generation

The following responses will be interpreted as successful results: Passed (Y), FailSSN(1), FailGender(2), FailDOB(3), FailDOBGender(4), FailName(5). The 'Passed' response indicates that all related information matched and the Social Security Number has been verified as being correct for the named individual. The other 5 listed responses indicate a discrepancy that should be investigated by the demographic verifier. The system will provide the corresponding prompt, but the option to leave the record unchanged will exist and will not prevent the record from being released.

3.12 Overrides

The Override options in General Data Entry apply to records that have not been initiated in general data entry. Records that have been initiated in either Demographic Data Entry or Medical Data Entry (on the facility/medical office level) may need to have overrides applied as described in this section. General Data Entry provides a means to search for and display these records.

3.12.1 Taking Forceful Ownership of a Record

Certain authorized users (i.e. coroners and state users) may take forceful ownership of a record in

their respective jurisdictions at any time it is found necessary to do so.

To take forceful ownership of a record:

1. Locate the record that you wish to take forceful ownership of through the Search Screen.
2. When the application loads the record in General Data Entry for the first time, the system will issue the following prompt:
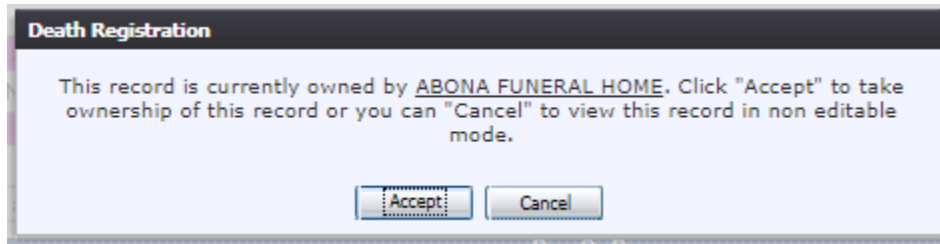

Death Registration

This record is currently owned by ABONA FUNERAL HOME. Click "Accept" to take ownership of this record or you can "Cancel" to view this record in non editable mode.

[Accept]   [Cancel]

Figure 47: Take Ownership Confirmation Message

   a. Click **Accept** to take ownership of the record in order to edit the record.
   b. Click **Cancel** to not take ownership of the record and view the record without editing it.

3. If you respond **Accept** to the above ownership acceptance prompt, you will become owner of the record and be able to perform tasks such as re-designating the medical certifier and relinquishing the funeral director.

4. The application will confirm that the acceptance of the record ownership was successful with the following message:

Death Registration   ×

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

[OK]
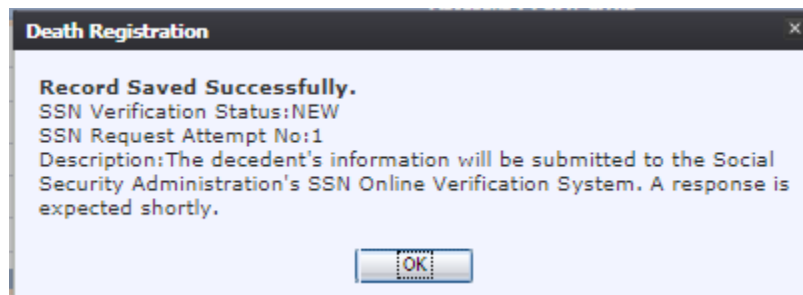
Figure 48: Record Saved Successfully Message

3.12.2 Re-Designate Medical Certifier
A General Data Entry user cannot forcefully re-designate a medical certifier on a record that already has a designated medical certifier unless the user takes forceful ownership of the record first.

To re-designate a Medical Certifier in General Data Entry:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps in 3.12.1Taking Forceful Ownership of a Record.
3. Select the **Record/Re-Designate Medical Certifier** menu item.
4. The following prompt will appear:
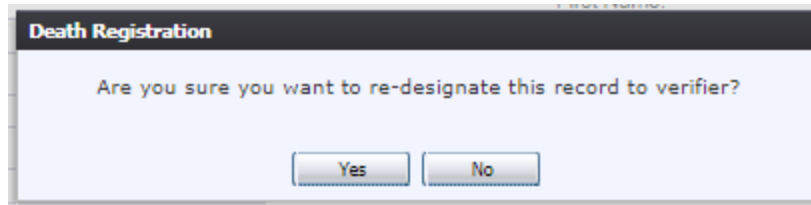
**Figure 49: Re-Designate Confirmation Message**

5. Click **Yes** to confirm that you wish to re-designate the medical certifier on the record.

3.12.3 Relinquish Funeral Director

In some cases it may be necessary to remove the associated funeral home and funeral director from a record so the record can be picked up by a different funeral home. This override will remove the present funeral home association to the record so the record available to be picked up by a different funeral home.

To relinquish a funeral director:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps in 3.12.1Taking Forceful Ownership of a Record.
3. Once the desired record has loaded, select the **Record/Relinquish** menu option. The following prompt will appear:
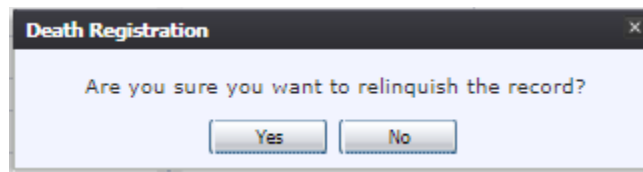
Figure 50: Relinquish the Record

4. Click **Yes** to confirm that you wish to relinquish the record and a comment box will appear:
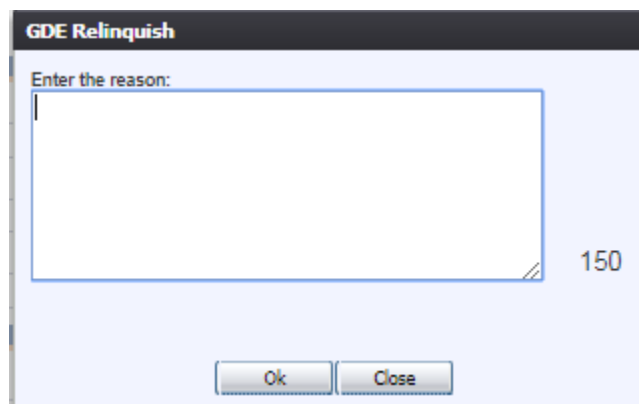
**Figure 51: GDE Relinquish Reason Message**

5. Enter a comment (150 characters) regarding the reason for relinquishing the record in the comment box.
6. Click **OK** to confirm the relinquishing of the record. The application will issue a message

confirming that the relinquishing was successful.
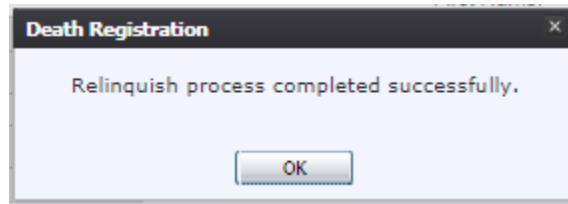
Figure 52: Relinquish Process Completed Successfully

3.12.4 Re-Designate Demographic Verifier

A General Data Entry user cannot forcefully re-designate a demographic verifier on a record that already has a designated demographic verifier unless the user takes forceful ownership of the record first.

To re-designate a Demographic Verifier in General Data Entry:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps in 3.12.1Taking Forceful Ownership of a Record.
3. Select the **Record/Re-Designate Demographic Verifier** menu option.
4. The following prompt will appear:
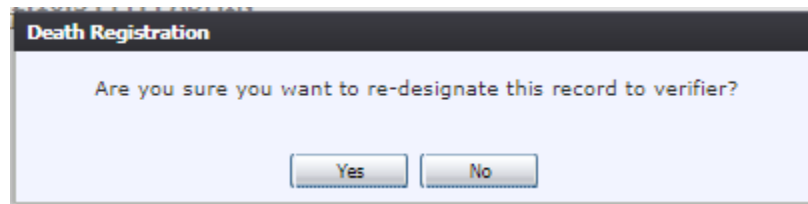
Figure 53: Re-Designate Record to Verifier

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

Figure 54: Demographic Designation Screen

6. Enter the Verifier Type and the Facility Name or the Verifier's Name. Select the desired medical certifier by clicking the associated row in the search results grid. The Certifier Search Screen will close and the medical certifier's information will populate in the medical certifier fields and the fields will disable.

3.12.5 De-Verify

The State users cannot forcefully De-Verify any record. In order to de-verify a record, they must first take ownership of the record through General Data Entry. They may then De-Verify the record and make any necessary changes.

To de-verify a record:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps in 3.12.1Taking Forceful Ownership of a Record.
3. Once the desired record has loaded, select the **Record/De-Verify** menu item. The following prompt will load


Figure 55: Enter PIN Message

4. Enter the PIN and click **OK**.
5. If the correct PIN is entered, the following message will load:
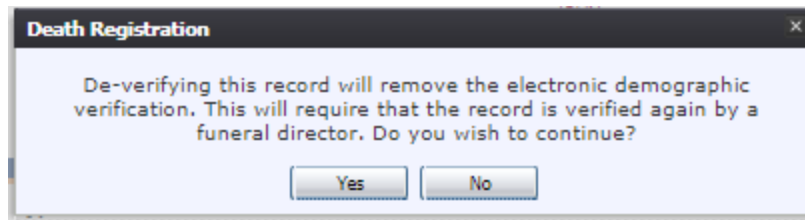
Figure 56: De-Verify Confirmation Message

6. Click **Yes** to confirm de-verification of the record and the comment box will load.
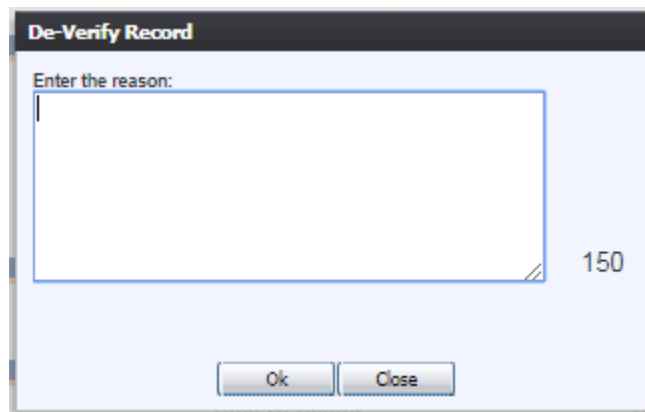
Figure 57: De-Verify Record Reason Message

7. Enter a comment (150 characters) regarding the reason for de-verification in the comment box.

8. Click the **OK** button to close the comment box. The application will issue the following message:
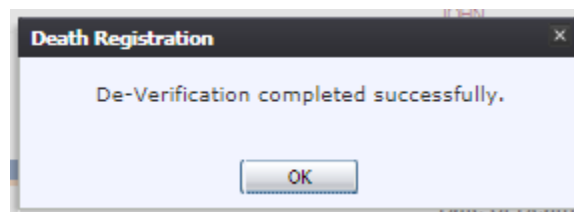
Figure 58: De-Verification Completed Successfully Message

3.12.6 De-Certify

State users may only de-certify a record. In order to do so, they must take ownership of the record through General Data Entry. They may then de-certify the record and make any necessary changes. The Local may de-certify a record in order to refer it to a Medical Examiner/Coroner. De-Certification requires the entering of the user's PIN>

To de-certify a record:

1. Locate the desired record through the Search Screen or the Work Queue.
2. Follow the steps in 3.12.1 Taking Forceful Ownership of a Record.

3. Once the desired record has loaded, select the **Record/De-Certify** menu option. The following prompt will load:
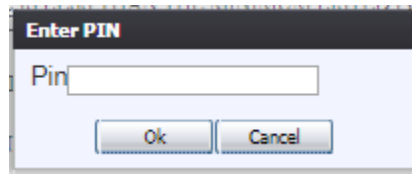
Figure 59: Enter PIN Message

4. Enter the PIN and click **OK**.
5. If the correct PIN is entered, the following message will appear:
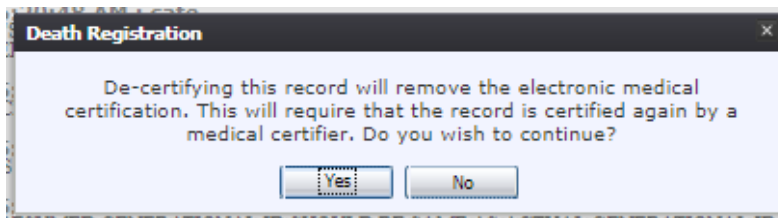
Figure 60: De-Certify Confirmation Message

6. Click **Yes** to confirm de-certification of the record and the comment box will load:
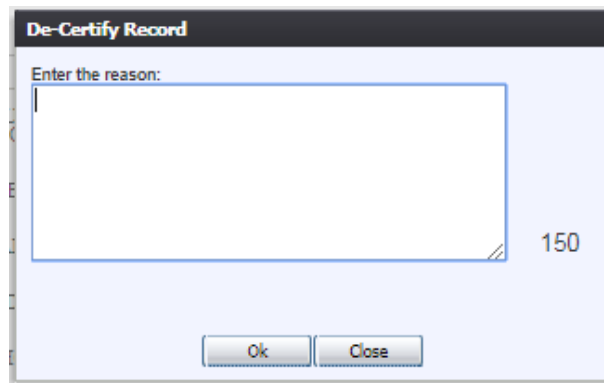
Figure 61: De-Certify Record Comment Box

7. Enter a comment (150 characters) regarding the reason for de-certification in the comment box.
8. Click the **OK** button to close the comment box. The application will issue the following message:
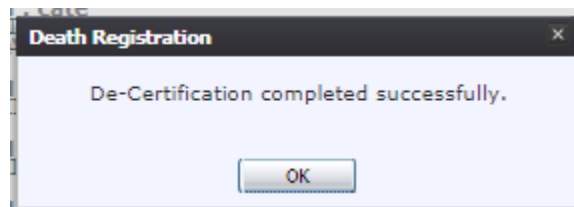
Figure 62: De-Certification Completed Successfully Message

3.13 Abandon a Record

Abandoned records are duplicate records that were unintentionally created twice electronically, or were initiated electronically and manually. Prior to abandoning a record, contact the owner of the record to ensure that the record should be abandoned or verify the same event has been registered.

To abandon a record:

1. Retrieve the record to be abandoned by setting the work queue filter to **Pending Verification.**
2. Once the record to be abandoned is on screen, select the **Record/Abandon**. The following prompt will appear:
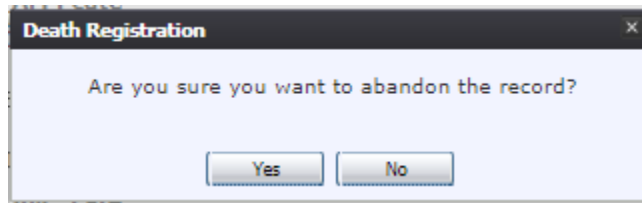
Figure 63: Abandon the Record Confirmation Message

3. Click **Yes** to complete the abandonment of the record.
   a. Click **No** to cancel the abandoning of the record and close the Abandon Record Prompt.

4. You will be prompted to enter a comment (150 characters max) regarding the reason for the record being abandoned.
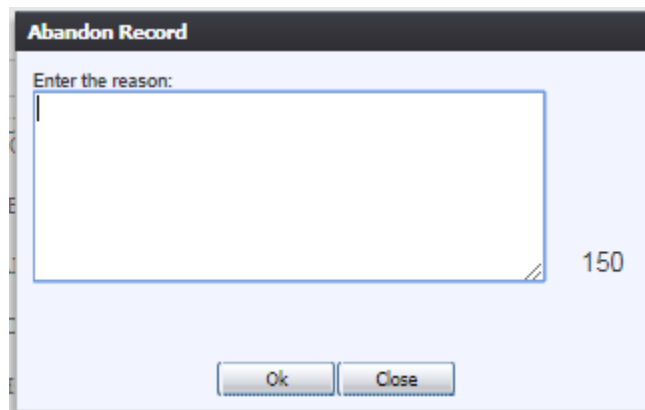
Figure 64: Reason for Record Abandonment Comment Box

5. Enter a comment and click **OK** to continue with abandonment.
   a. Click **Close** to cancel the abandoning and close the comment box.

6. After entering a comment, the following message will appear:
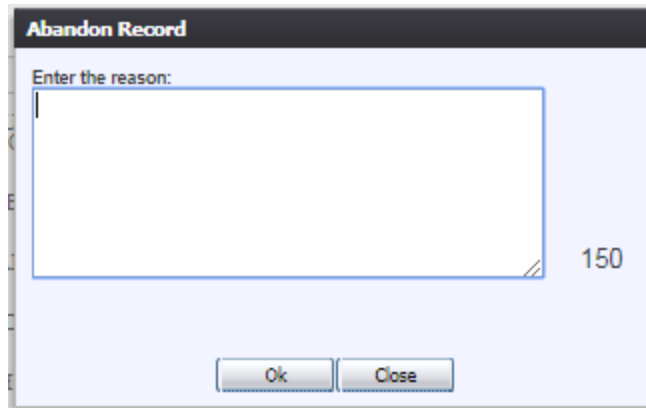
Figure 65: Abandon Record Reason Comment Box

3.14 Release a Record

After a record has been completed in General Data Entry, it must be released in order to be assigned a State File Number and be a registered record in the State of Texas.

To release a record:

1. Retrieve an existing record using the Work Queue Search.

2. When the appropriate record appears on the screen, select the **Record/Release** menu item to initiate the release process. A message will appear requesting a PIN:
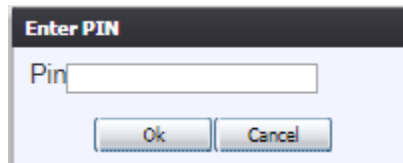
Figure 66: PIN Entry Screen

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

4. If the correct PIN is entered, the following message will load:
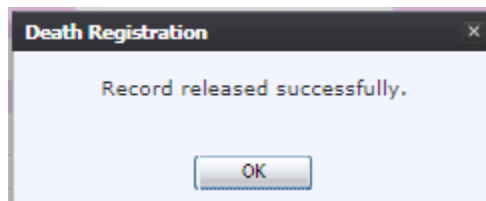
Figure 67: Record Released Successfully

4   Back Data Entry (BDE)

The Back Data Entry process allows for the processing of delayed, out of state and legacy record types. Back Data Entry is the only step in this In-House data entry process. Once a record is released from Back Data Entry, it is assigned a State File Number and is a registered record in the State of Texas.

4.1   Access Back Data Entry

To access the **Back Data Entry** screen:

1. Go to **Death/Functions/Back Data Entry**.

4.2   Create a New Record

The **Back Data Entry** function allows authorized users to create/initiate the following types of records:

- Delayed
- Out of State Death
- Legacy New

To create a new record:

1. Go to **Death/Functions/Back Data Entry**. The **Back Data Entry Initial Load** screen will appear.

2. Click on the **New** icon 🗋 or select the **Record/New** menu option to initiate a new record. The **New Record Screen** will appear:

Figure 68: New Record Data Entry Screen

3. Enter all available information about the death event in the following fields:

Out of State Birth	Out of State Birth
Date of Death Type	Select Date of Death Type

Out of State Birth	Out of State Birth
Date of Death	Enter Date
SSN or EDR Number	Enter either the SSN or the EDR Number
Record Type	Select the Record Type
Last Name	Enter Text
Gender	Select Gender

4. Minimally, enter values into all fields listed above and click **Find Record**.

5. If a match is *not* found, the application will display the following message:
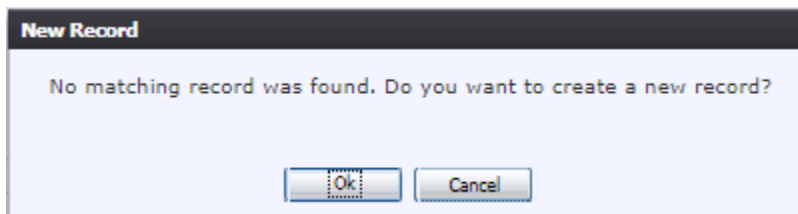
Figure 69: Back Data Entry Record Creation Confirmation Message

    a. If the user selects **No**, a new record will not be created in back data entry.

    b. If the user selects **OK**, the data entry screen will appear:

6. If multiple potential matches are suspected, the system will display a message that matches have been found. The message will ask the Local user to review the mandatory fields for accuracy. The Local user should click **Cancel** if they are uncertain the record is a duplicate. To save the record, click **OK** and the record will be flagged as a potential duplicate.

Figure 70: Back Data Entry Screen

4.3 Pick Up an Existing Record

The **New Record** function allows authorized users to create/initiate a death record within the **TxEVER** Death Application.

1. Go to **Death/Functions/Back Data Entry**. The **Back Data Entry Initial Load** screen will appear.

2. Click on the **New** icon ⬜ or select the **Record/New** menu option to initiate a new record. The **New Record Screen** will appear:

Figure 71: New Record Data Entry Screen

3. Enter all available information about the death event in the following fields:

Out of State Birth	Out of State Birth
Date of Death Type	Select Date of Death Type
Date of Death	Enter Date
SSN or EDR Number	Enter either the SSN or the EDR Number
Record Type	Select the Record Type
Last Name	Enter Text
Gender	Select Gender

4. Minimally, enter values into all fields listed above and click **Find Record**.

5. If a match owned by the same location is found, the application will display the following message:
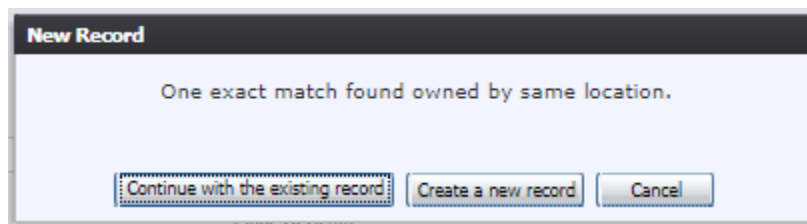
Figure 72: New Record Exact Match Window

a. Select **Cancel** to close out of the message and return to the New Record Screen.

b. Select **Continue with the existing record** to open the existing record and begin editing.

c. Select **Create a new record** to start a new record with the entered information.

4.4 Search for a Legacy Record

Searching for a record in the application can be accomplished using the following options:

- **Search** screen

- **Work Queue Search**

4.4.1 Search Screen

The same search screen will apply to Demographic Data Entry, Medical Data Entry, General Data Entry, and Back Data Entry processes. However, the Search Screen functionality within Back Data Entry will only allow for users to search for existing legacy records.

1. Click the **Search** icon 🔍 or select the **Record/Search** menu item.
2. The **Search Record** screen will appear:

Figure 73: Death Search Screen

3. Enter all available information regarding the record. Decedent's date of death is a mandatory field.

   ✓ **Tip**: Text fields such as names do not have to be complete. Enter the first several

letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.

✓ **Tip**: Along with a name, including the year of death (which can be entered as a series of 00s followed by a year - i.e. 00/00/2012) and gender and other information will reduce the number of matches that are returned and faster search results.

✓ **Tip**: Choosing 'Soundex' still requires the user to enter at least the decedent's year of death. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound familiar as well.

4. Click **Search** to search the database.

Records that match the search criteria will load in the grid in the lower half of the screen.

Figure 74: Death Search Screen with Results

5. Click **Select Records** to load records to the work queue.

6. Select a record from the work queue.

The selected record will be retrieved by the system and its information will appear on the

screen as an active record for additional review and/or processing.

4.4.2 Back Data Entry Work Queue

The **Back Data Entry** process will contain a work queue that is populated by records for which all applicable data entry processes have not yet been completed.

The list in the work queue will be sorted by the date of death and will display the decedent's last name, decedent's first name, and date of death.

1. Select **All Unresolved** from the work queue filter drop-down list.
2. From the **Unresolved** work queue, select the appropriate record by clicking on it or, with focus on the list, start typing the decedent's last name (if available).
3. The selected record will be retrieved by the system and its information will appear on the screen.
4. Proceed with processing the record as required in **Back Data Entry.**

4.5 Unresolved Fields List

Depending on the type of record, a number of actions need to be performed before a record is ready to be submitted for further processing. To check if all data items and actions were performed, use the **Unresolved Fields** list to identify areas that require some sort of action before the record is resolved. The Unresolved Fields List displays individual data fields and processes that need to be completed for a specific record before it can be resolved.

To retrieve an existing record:

1. Click the **Unresolved/StakeHolders** button to open the **Unresolved Fields** list.
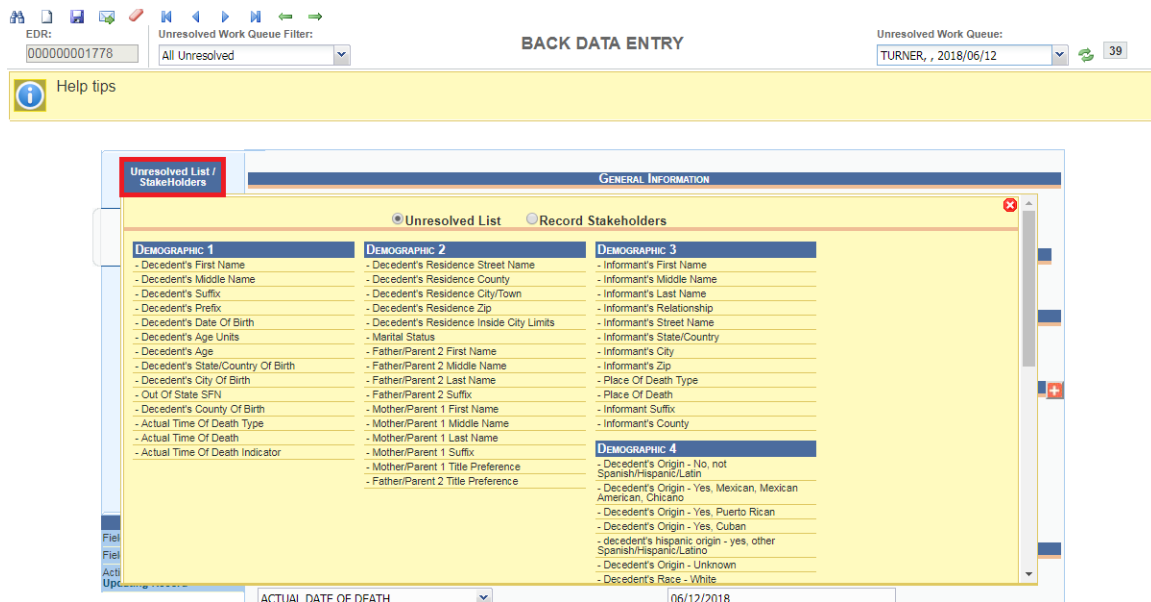
Figure 75: Unresolved Fields List

2. To be directed to a specific unresolved field, click the field's link. The application will

navigate to that particular field directly so that it may be resolved.

3. Click **Unresolved/StakeHolders** again to close the list and return to the **Data Entry** screen.

4.6 Canceling Changes

A user may cancel changes made to a record since it was last saved.

To cancel changes made to a record:

1. While a record is on screen, select the **Record/Cancel** menu option or click the ✎ icon.

   The following message will appear:
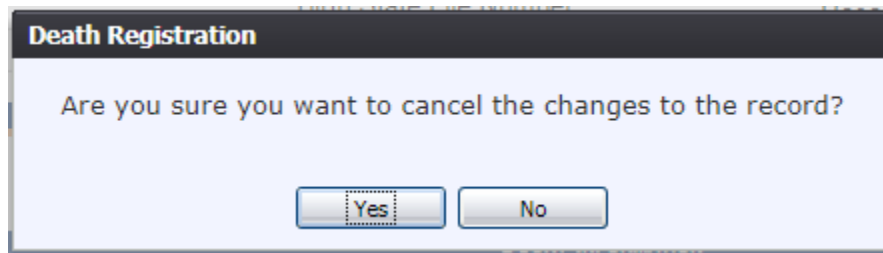
Figure 76: Cancel Changes Confirmation Message

2. Click **Yes** to confirm the cancellation of the changes made to the record.

   The changes will be canceled and the record will be restored to its previously saved state.

4.7 Abandon a Record in Back Data Entry

A user may abandon a birth record in **Back Data Entry** similar to the way a record is abandoned in **General Data Entry**.

In order to abandon a record:

1. Search for a record using the Search Screen or the Work Queue.

2. Once the record is retrieved to the **Back Data Entry** screen, select the **Record/Abandon** menu item. The following message will appear:
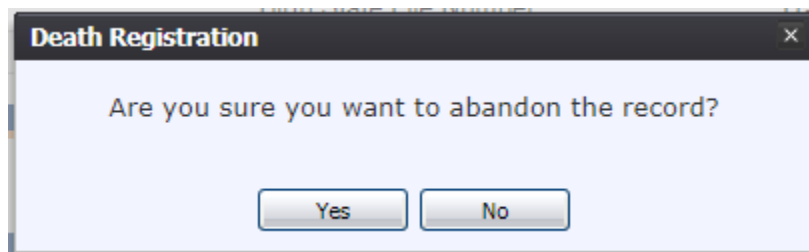
Figure 77: Record Abandon Confirmation Message

a. Select **No** to cancel the action and return to the record.
b. Select **Yes** to continue abandoning the record. Provide a reason for abandoning the record in the **Comment** box that will appear.
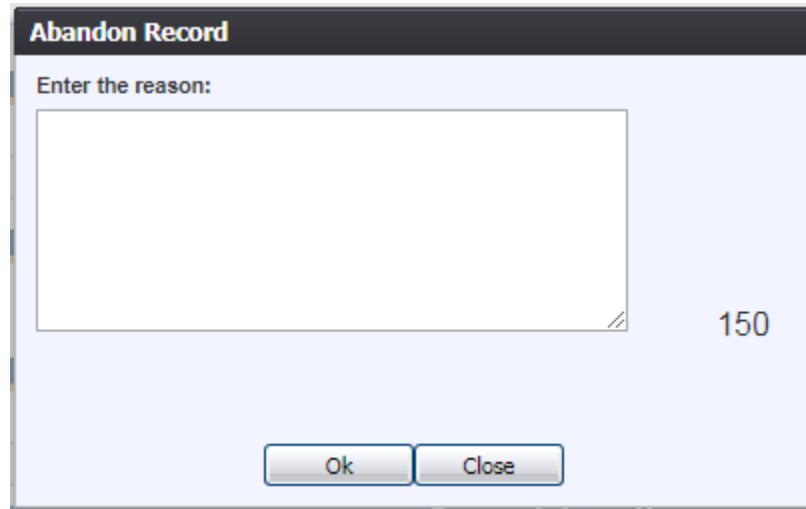
Figure 78: Abandon Record Comment Screen

After providing a comment and clicking **OK**, the following message will appear and the record will be removed from the **Unresolved Work Queue**.
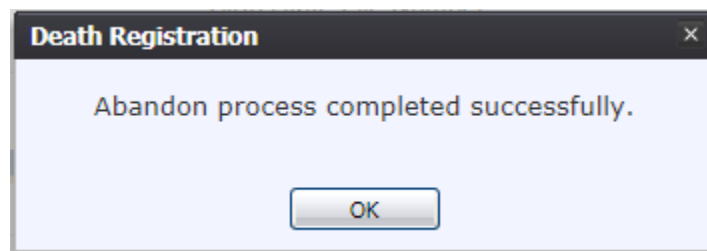
Figure 79: Record Abandon Completion Confirmation Message

4.8   Back Data Entry Topics

The Back Data Entry user can complete data entry of a record which will trigger no field and cross-field edits, and cross-checks for the record. This will allow for the Back Data Entry user to enter a minimal amount of information in order to register the record. Records that are data entered in the In-House Back Data Entry process (by Local users) will not need to be electronically verified/certified in order to be released.

The objective of this section is to address data entry completion topics so that records may be available for further processing. Most of the data items that need to be completed will only require the **Tab** key to advance again. This section attempts to address the remaining scenarios.

4.8.1   Record Types

When a **New** record is initiated in Back Data Entry, the user must indicate a Record Type. Some

rules will relate to specific record types as noted below.

Delayed

A Delayed Record is any record that is filed more than one year after the date of death. Delayed Records may have different data associated with them than a regular death certificate and may contain no cause of death information.

Out of State

An Out of State Record can be a record where the decedent is either a Texas citizen whose place of death was outside the state of Texas, or an out of state citizen whose place of death was a location in Texas.

Legacy

Records of this type can either be indexed records that have been imported into the TxEVER system as a result of initial data conversion or records that are initiated in Back Data Entry as new legacy records.

> **Indexed Legacy Records**
>
> Once the user has retrieved a legacy record in the system through a search, the user may add additional information to the electronic version of the legacy record. Once released from the back data entry process, such records will then be considered as fully electronic records and as such will not be issued from paper. After the record is released from Back Data Entry, the legacy record indicator will be removed. There will be no net-change history maintained until after the record is registered.
>
> **New Legacy Records**
>
> If the user is unsuccessful in locating a legacy record through the Back Data Entry search, the user may choose to create a new legacy record and enter all available information. A record that is initiated as a new legacy record will provide the user with the ability to manually enter an SFN into the system rather than having the system automatically assign an SFN.

4.8.2 AKA Names

The **AKA Name** fields are among the first ones encountered once the record is initiated by entering data on the **New Record** screen. **TxEVER** contains the ability to capture multiple sets of decedent's AKA (Also Known As) name fields (First, Middle, Last, Suffix) if they are available. To add an AKA Name:

3. Click on the **Add/Edit AKA Names** button (located next to the title bar of the Decedent's Legal Name fields section on Demographic 1 tab).

Figure 80: Add AKA Names Button

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

Figure 81: AKA Names Entry Field

4.8.3   Pick List Navigation

The **Place of Death** fields illustrate the concept of pick list drop-down menus. Refer to the examples below to quickly retrieve entries and expedite data entry.

Figure 82: Place of Death Fields

2. Set focus on the **Type of Place of Death** field by clicking in the field. Open the drop-down list by clicking on the arrow symbol or by pressing the down arrow key on the keyboard.

- Selecting from the drop-down is the standard approach when unfamiliar with the entries. Instead of opening the list, the user can also start typing the first letters of the entry to retrieve it.

3. After selecting an item from the pick list, press the **Tab** key to advance to the next field. Mandatory fields and pick lists will change based on what item was selected for **Type of Place**.

4.8.4 Screen Tab Navigation

When the last field on the **Demographic 1** tab is resolved the next field that needs a response is on the **Demographic 2** tab.

Pressing **Tab** from the final field on the **Demographic 1** tab automatically advances the focus to the **Save** button at the bottom of the screen and the user can press **Tab** one more time and then press **Enter** on the keyboard to load the **Demographic 2** tab. The user can also navigate to various screen tabs by clicking on them with a mouse.

4.8.5 Place of Death Information

Once a type of place is selected, the address fields for a listed hospital are automatically populated. These types of fields are retrieved from the database and are referred to as bypassed and disabled. The address information of a given facility cannot be directly edited on the screen.

Figure 83: Place of Death Information

4.8.6 Death Age Entry

Decedent's Date of Birth fields require entry in the Age Unites and Age fields to determine record processing sequence.

5. With the mouse, click on the **Date of Birth** field and use the **Tab** key to advance to the **Age Units** field on the **Demographic 1** tab

Figure 84: Decedent's Date of Birth Fields

6. If you haven't entered decedent's Date of Birth already, do so now, and press **Tab** to advance to the Age Units field.
7. In the Age Units field, use the mouse to click on the down arrow icon or use the **down arrow** key on the keyboard to open the list and select the appropriate age unit (years, months, days, hours, minutes).
8. Enter the decedent's age at the time of death. If the entered value does not coincide with the value calculated by the system by taking into account the birth and death dates, the following screen will be displayed:
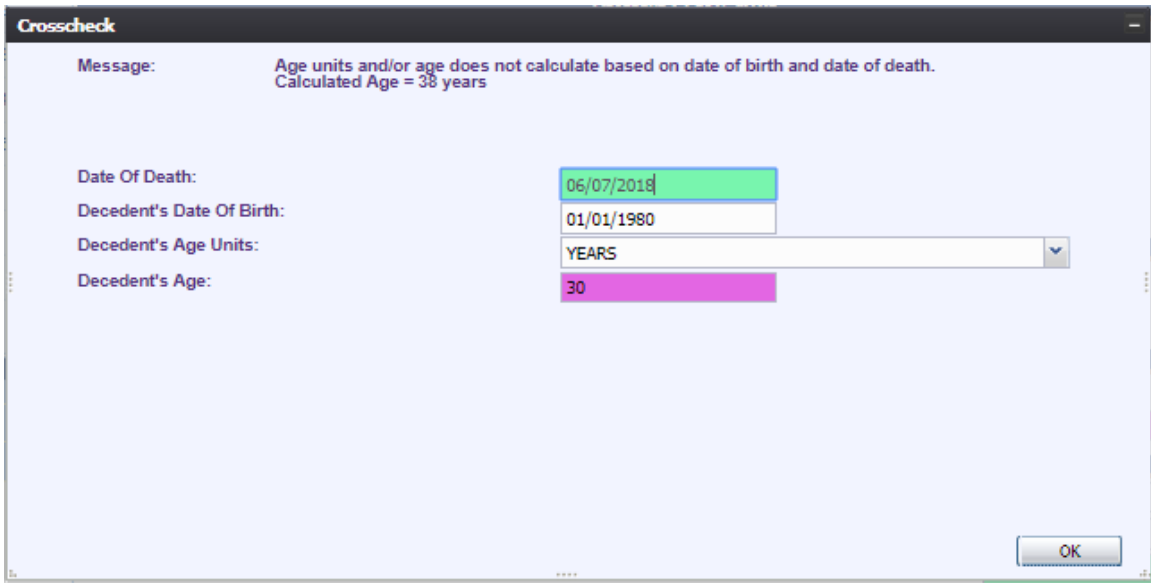
Figure 85: Decedent Date of Birth Crosscheck Screen

6. Correct the age and click **OK**. Use the **Tab** key to advance to the next field.

4.8.7 Funeral Facility Profile

In Back Data Entry, the funeral facility will need to be selected from the Facility Name combo-box. If a selection is made from the pick list, the address fields are retrieved from the database and cannot be directly modified on the screen.

Figure 86: Funeral Facility Profile

4.8.8 Funeral Service Licensee

This is the individual associated with the Funeral Location who has demographically verified the record as the funeral director.

This is a drop-down type-ahead pick list that will contain only funeral directors associated with the Funeral Location on the record.

4.8.9   Additional Funeral Service Provider

Additional Service Provider field is associated with trade calls. These are cases where the funeral home of record (the funeral home responsible for filing the death certificate) is not providing all of the services for the family and the names of both funeral establishments need to be captured.

Example: if Jones Funeral Home is entered as the Additional Funeral Service Provider and Johnson Funeral Homes Inc is the funeral home that is responsible for filing the death certificate, the name of the additional funeral home will be entered in the Additional Funeral Service Provider field.

The license number of the funeral home that files the death certificate will print on the death certificate.

4.8.10 Ethnicity and Race Field Properties

The **Ethnicity** field allows one selection from the available options. Use the mouse or the **Spacebar** key to select an option. Use the **Tab** key and the **Shift + Tab** key to navigate to the desired choices and the **Spacebar** or the mouse to select or de-select.

To change the choice, the selected choice must first be unchecked by clicking on it again and then selecting a different choice.

Figure 87: Ethnicity and Race Fields

Race fields allow multiple choices. Click as many choices as needed.

4.8.11 Certifier Fields

For In-House purposes, the certification has already taken place and the Certifier has already been identified on the paper document. However, a medical certifier office/practice will still need to be identified on the electronic record.

Selecting the medical certifier will also populate the Office/Practice on the record. Selecting a medical certifier will not cause an email message to be sent to the medical certifier when the data entry is performed in General Data Entry.

1. Retrieve a record that needs designation of a Medical Certifier using the **Search Screen** or through the **Work Queue**.

    Note: Certain fields must be resolved before the medical certifier designation process can occur. If these fields are not completed, an alert message will appear.

Figure 88: Medical Designation Alert Message

2. Navigate through the data entry screens to the Medical 4 data entry screen and select a value for the Certifier Type field. This will enable the Certifier Search and the **Search Certifier** button will become visible on the screen. Click the **Search Certifier** button.

Figure 89: Certifier Search Fields

3. The Medical Certifier Search Screen will load:

Figure 90: Certifier Search Screen

4. Enter information into all required search fields and then click **OK**. The search results grid will load all certifiers that match the entered search criteria.

Figure 91: Certifier Search Screen Completed

5. Select the desired medical certifier by clicking the associated row in the search results grid. The Certifier Search Screen will close and the medical certifier's information will populate in

the medical certifier fields and the fields will disable.

4.9   Record Comments

Certain events that take place, such as when a coroner declines a designation or a referral, require that a comment be entered. These comments are stored and can be viewed in a grid on the Comments tab of the data entry screens.

Figure 92: Comment Log Screen

The following information regarding each comment will be stored:

- Action that required the comment
- User logged in when the comment was entered
- Date and time the comment was entered
- Text of the comment (600 characters)

Comments may be entered or viewed by clicking on the **Comments Tab** in General Data Entry.

4.10 SSN Verification

Records filed entirely on paper or where the demographic verifier was not participating may require that the SSN Verification process take place. The transaction will be sent when all related data items are resolved as operator continues to edit the record. The EDRS will perform an automatic SSN Verification and provide response codes, instructions and notifications to the user, as applicable.

Note: after entering initial record data and saving the record, you may need to wait several minutes to get a Verification Status response and retrieve the response by again saving the record at that time. Saving the initial record data and later returning to complete the record by accessing the record from the Unresolved Work Queue will also ensure that the SSN Verification Status is retrieved and saved on the record.

4.10.1 Automated Process

The process is a behind-the-scenes process that is automatically triggered by data entered in the Demographic Data Entry when the following fields have been resolved and saved:

- ✓ Decedent's Last Name
- ✓ Decedent's First Name
- ✓ Decedent's Middle Name
- ✓ Decedent's Date of Birth
- ✓ Decedent's Gender
- ✓ Decedent's Social Security Number
- ✓ State of Death

The system looks for results of the request (if necessary) when the record is saved, when it is again retrieved, and when the verifier attempts to verify the record. The demographic data entry screen contains an indicator of the SSN Verification Status for the record.

Up to five (5) separate attempts can be made to verify-re-verify the SSN. The system will count the attempts made and if three (3) or more attempts are made on the same record, an entry will be made in the system audit log. Multiple attempts on the same record could be an indicator that various names and/or Social Security Numbers are being entered to 'fish' for matches.

Figure 93: Decedent's SSN Verification Fields

4.10.2 Response Generation

The following responses will be interpreted as successful results: Passed (Y), FailSSN(1), FailGender(2), FailDOB(3), FailDOBGender(4), FailName(5). The 'Passed' response indicates that all related information matched and the Social Security Number has been verified as being correct for the named individual. The other 5 listed responses indicate a discrepancy that should be investigated by the demographic verifier. The system will provide the corresponding prompt, but the option to leave the record unchanged will exist and will not prevent the record from being released.

4.11 Release a Record in Back Data Entry

After a record has been completed in Back Data Entry, it must be released in order to be assigned a State File Number and be a registered record in the State of Texas.

To release a record from Back Data Entry:

1. Retrieve an existing record using the Search Screen or the Work Queue.

2. When the appropriate record is on the screen, select the **Record/Release** menu option to initiate the release process. The following message will appear:
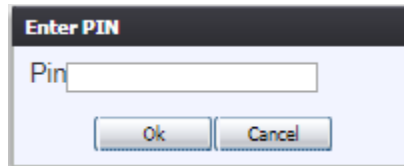
Figure 94: PIN Entry Screen

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

4. If the correct PIN is entered, the following message will load:
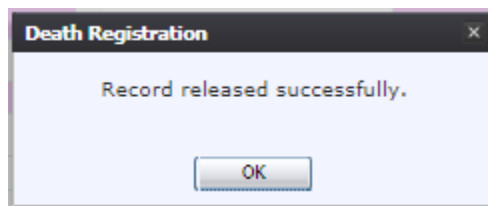
Figure 95: Record Released Successfully

5   Local Print Queue

The Local Print Queue screen allows for authorized Local users to batch print book copies of death records.

5.1   Access Local Print Queue

Access the **Local Print Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Print Queue.**

5.2   Search for Records Previously Not Printed

1. Access the **Local Print Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Print Queue.**

2. Select the desired group of records for printing from the Document Filter. Options are:

   - All Death Documents
   - Newly Registered Records
   - Medical Amendment
   - Void Notices
   - Notice of Do Not Issue
   - Disinterment Permit
   - Death Amendments

3. Leave **All Previously Not Printed** radio selected to view all records ready to be printed.

Figure 96: Local Print Queue

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

Figure 97: Local Print Queue with Records Loaded

5.3   Search for Records Previously Printed

1. Access the **Local Batch Print** screen by selecting **Death** at the top of the screen and going to **Functions/Local Batch Print.**

2. Select the desired group of records for printing by selecting the All Previously Printed radio button and entering in the desired search criteria:

Figure 98: Local Print Queue-Search for Previously Printed Records

3. Click the **Submit** button to load all previously printed records that match the search criteria in the search grid. Clicking the **Clear** button will clear the search results and the search fields.

5.4 Print Records

1. Access the **Local Batch Print** screen by selecting **Death** at the top of the screen and going to **Functions/Local Batch Print.**

2. Select the desired group of records for printing by entering the selected criteria into the search fields.

3. Click the **Submit** button to load all records that match the search criteria in the search grid.

4. Select all records for printing by clicking the **Select checkbox** located in the header of the Select column in the search results grid or click the select checkbox for individual records:

Figure 99: Local Print Queue-Select checkboxes

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

6. The system will issue the following message:
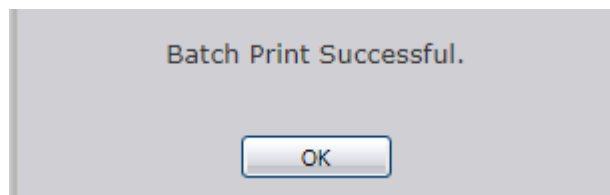
Figure 100: Batch Print Message

7. Click **OK** to close the message and open all requested records in a PDF window for printing.
8. Close the PDF window to return to the Local Print Queue Screen.

6   Local Burial Transit Permit Queue

6.1   Access Local Burial Transit Permit Queue

Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue.**

6.2   Search for Permits

1. Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue.**

2. Enter the date range for the date the permit was requested and the name of the funeral home (if desired):
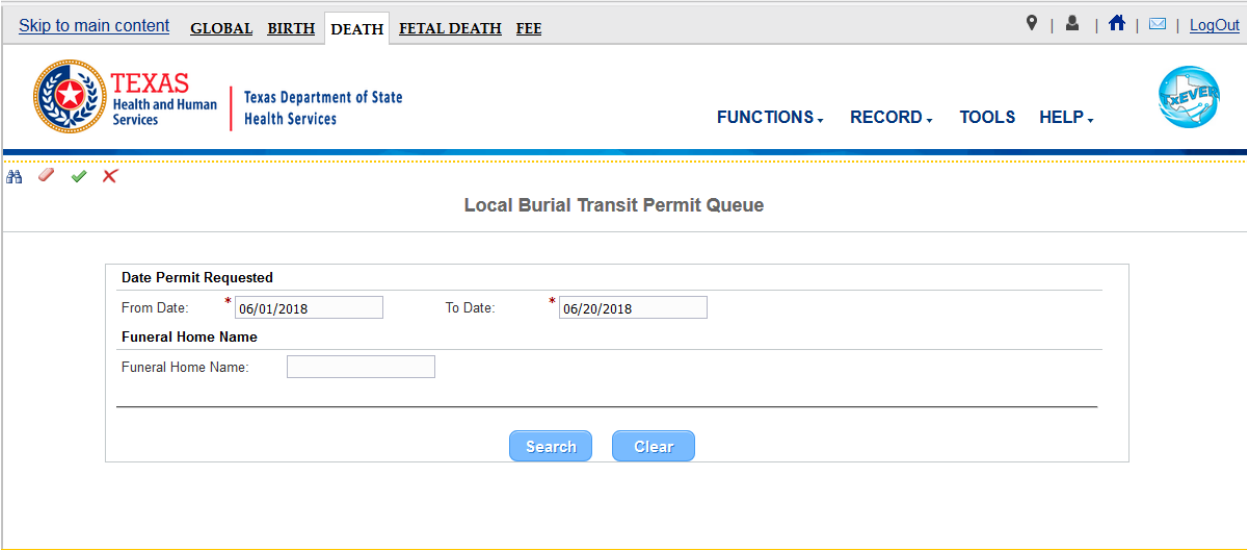
Figure 101: Local Permit Print Queue Screen

3. Click the **Search** button to find all permits requested in the selected date range:

Figure 102: Local Burial Transit Permit Queue

6.3   Accept Permit Request

1. Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue.**

2. Enter the date range for the date the permit was requested and the name of the funeral home (if desired):
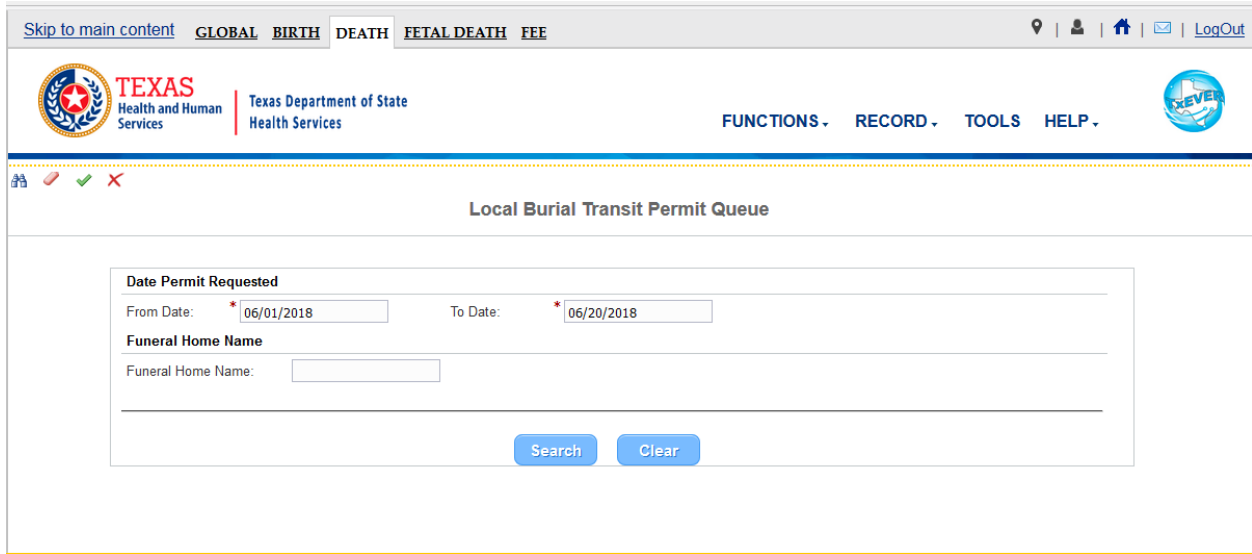
Figure 103: Local Permit Print Queue Screen

3. Click the **Search** button to find all permits requested in the selected date range:
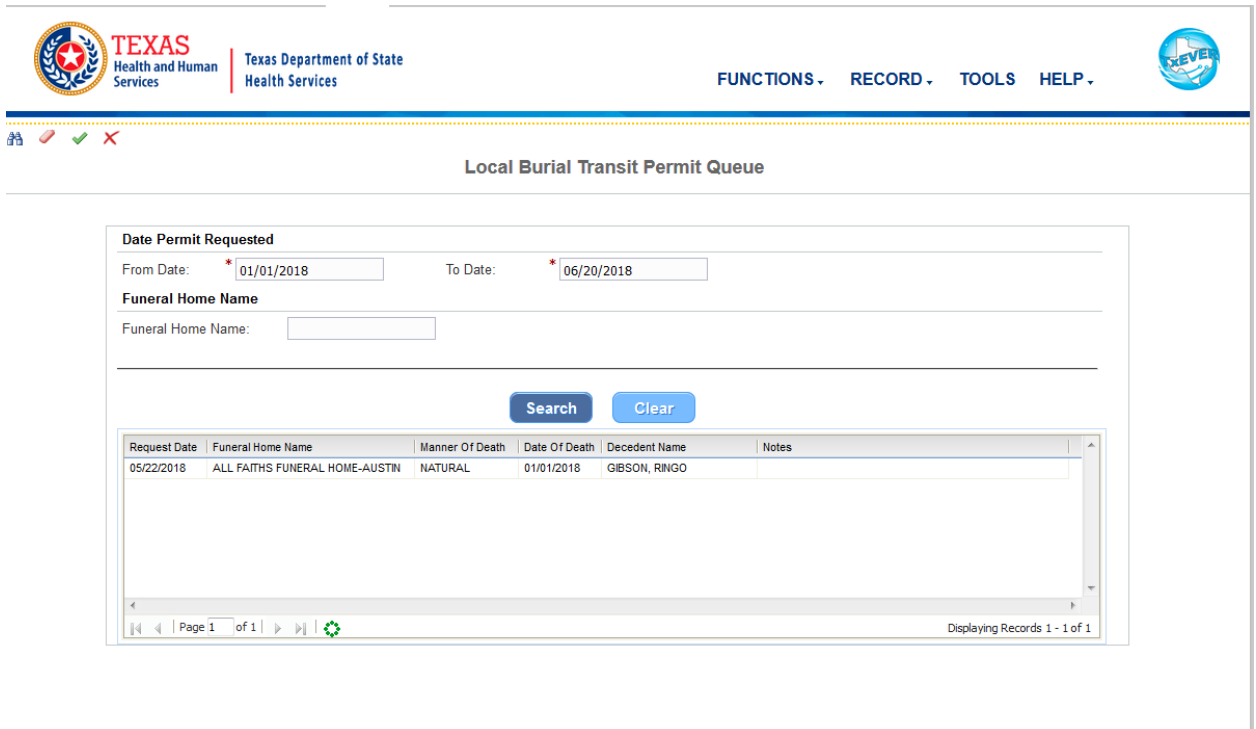
Figure 104: Local Burial Transit Permit Queue

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

Figure 105: Local Burial Transit Permit Queue with Permit Request

5. Click the **Accept** button to accept the permit request. The application will issue the following message:

6.4   Reject Permit Request

1. Access the **Local Burial Transit Permit Queue** screen by selecting **Death** at the top of the screen and going to **Functions/Local Burial Transit Permit Queue.**

2. Enter the date range for the date the permit was requested and the name of the funeral home (if desired):
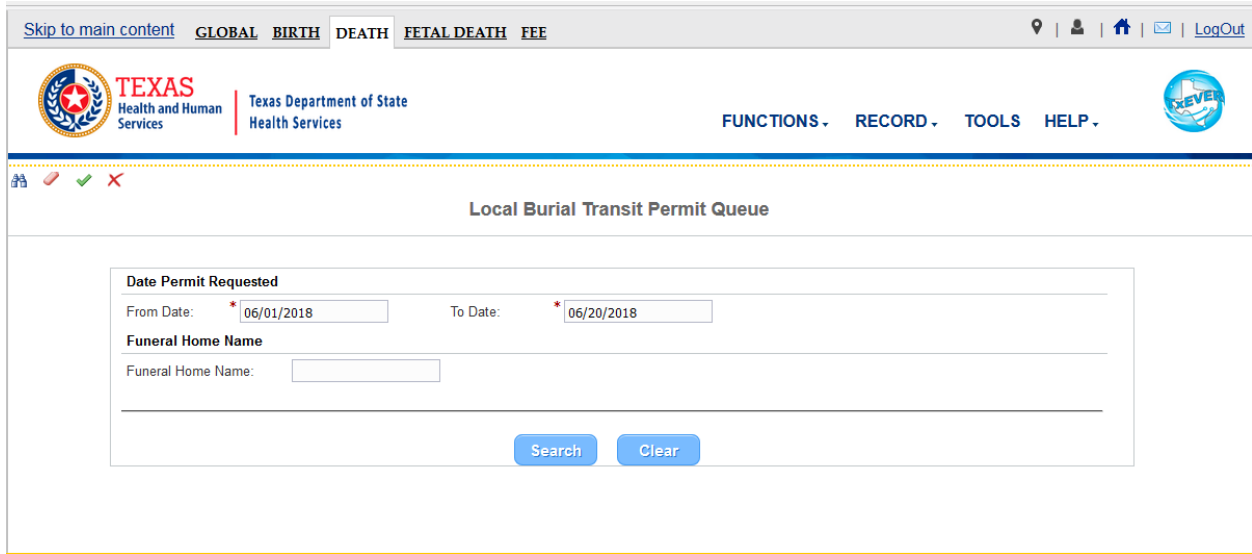
Figure 106: Local Permit Print Queue Screen

3. Click the **Search** button to find all permits requested in the selected date range:
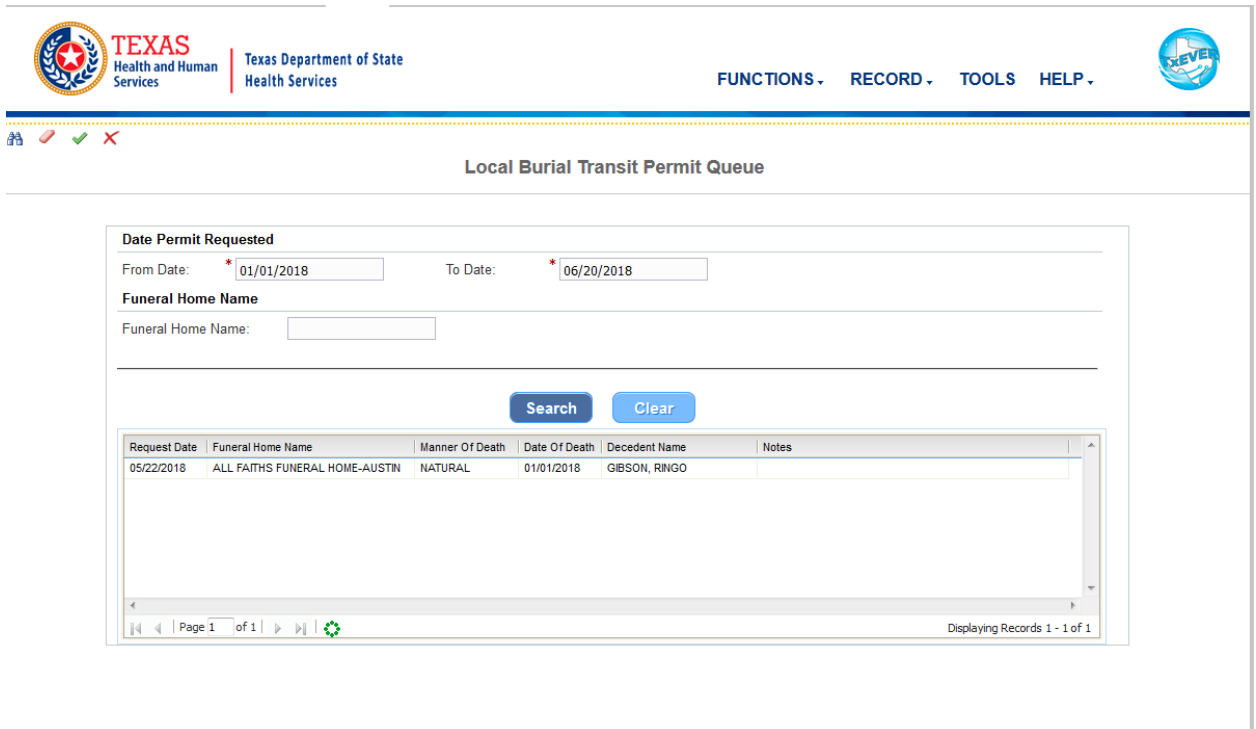
Figure 107: Local Burial Transit Permit Queue

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

Figure 108: Local Burial Transit Permit Queue with Permit Request

5. Click the **Reject** button to reject the permit request. The application will issue the following message:
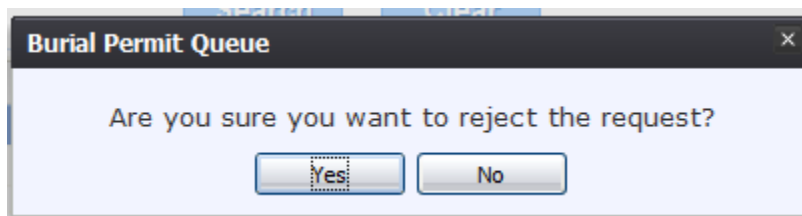
Figure 109: Record Rejection Confirmation Message

6. Click **Yes** to continue with the rejection of the burial transit permit request or click **No** to cancel the rejection of the request.

7. The Burial Permit Request Comment screen will appear:
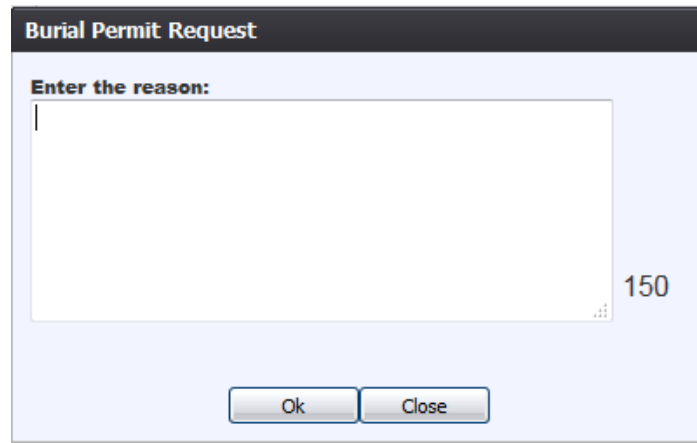
Figure 110: Burial Permit Request Comment Screen

8. Enter the reason for the rejection of the burial permit request and then click the **OK** button.

9. The application will issue the following message:
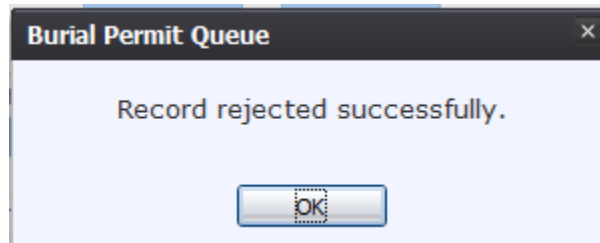
Figure 111: Record Rejected Successfully Message

7   Local Acceptance Queue

Once a death record has been accepted by the State, it then goes back to the appropriate local facility's **Local Acceptance Queue.**

7.1   Access Local Acceptance Queue

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.

7.2   Accept a Record

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.

2. Once the appropriate record is on the screen, users may either click **Record/Accept** or click the Accept icon ✔ to accept the record.

3. Once **Accept** has been selected, the following message will appear:
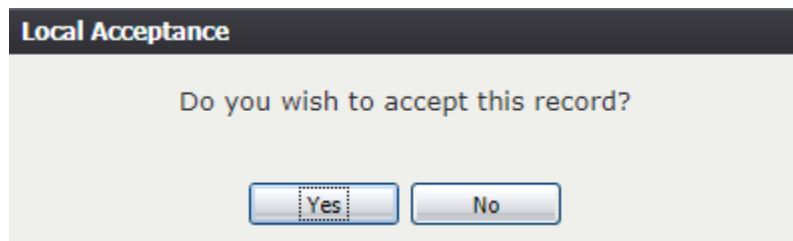
Figure 112: Record Acceptance Confirmation Message

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

5. Once the record has been accepted, the following message will appear:
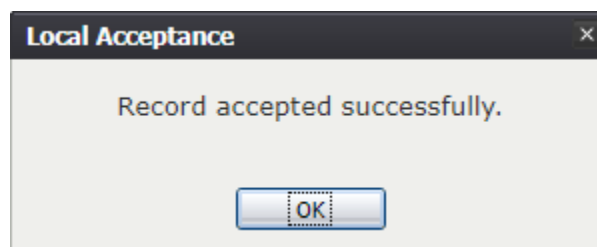
Figure 113: Record Accepted Successfully Message

7.3   Reject a Record

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.

2. Once the appropriate record is on the screen, users may either click **Record/Reject** or click the Reject icon ✗ to reject the record.

Note: Only those records with Decedent's Home as Place of Death can be rejected.

3. Once **Reject** has been selected, the following message will appear:

Local Acceptance Queue

Are you sure you want to reject this record?

[Yes]   [No]
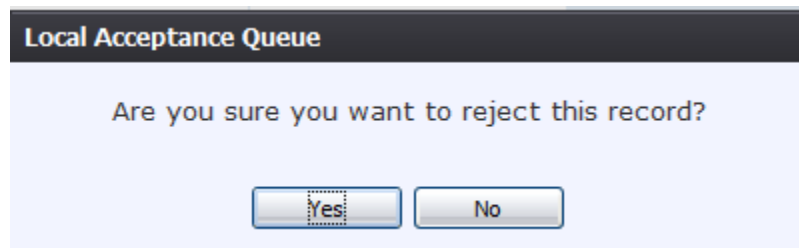
Figure 114: Record Rejection Confirmation Message

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

5. The Reject Record Comment screen will appear:

Reject Record

Enter the reason:

500

[Ok]   [Close]
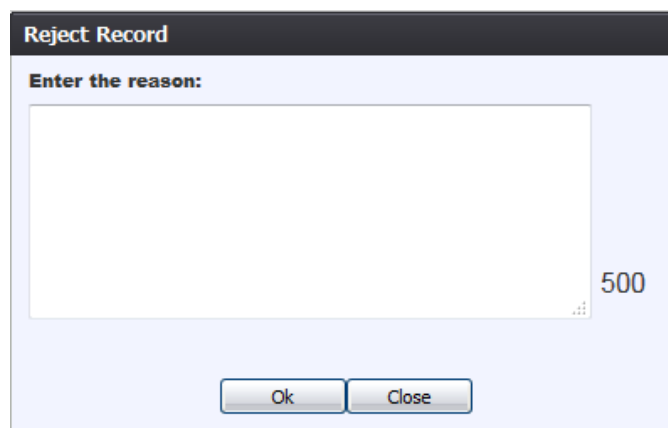
Figure 115: Reject Record Comment Screen

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

7. The application will issue the following message:
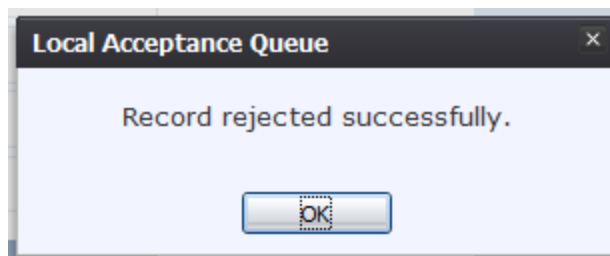
Figure 116: Record Rejected Successfully Message

7.4 Re-Assign a Local

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.

2. Once the appropriate record is on the screen, users may either click **Record/Re-Assigned to Local** or click the Re-Assigned to Local icon [image] to open the Local Reassignment screen:

Figure 117: Main Local Re-Assignment Screen

Note: Only those records with Decedent's Home as Place of Death can have the local re-assigned.

4. Navigate to the Demographic 3 tab and click the wrench icon next to the Local field to initiate the editing of this field:

Figure 118: Local Re-Assignment Screen

6. Edit the value in the Local field and click the **Save** button to return to the main Local Re-Assignment screen.

7. Select the **Process/Re-Assign to Local** menu item or click the Re-Assign to Local ✔ icon. Select the **Process/Cancel** menu item or click the Cancel ✖ icon to cancel the re-assignment.

8. The Local Re-assignment Comment Screen will appear:
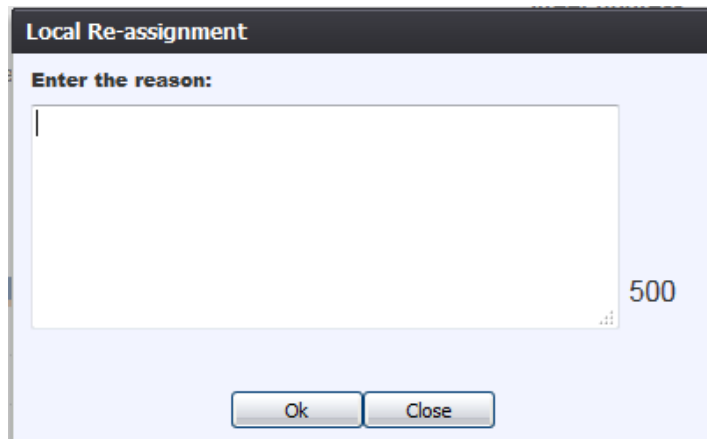
Figure 119: Local Re-Assignment Comment Screen

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

9. The application will issue the following message:
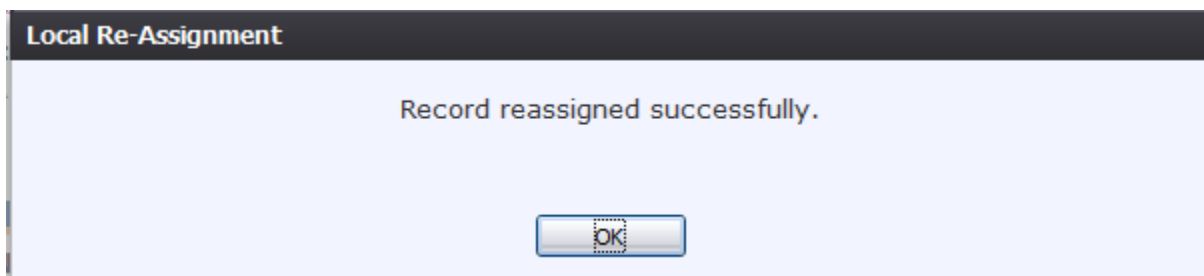
Figure 120: Record Reassigned Successfully Message

7.5 View Corrections

1. Go to **Death/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.

2. Once the appropriate record is on the screen, users may either click **Record/Re-Assigned to Local** or click the Re-Assigned to Local icon to open the Local Reassignment screen:

Figure 121: Main Local Re-Assignment Screen

9. Select the **Process/View Corrections** menu item or click the View Corrections ⊞ icon.

10. The Correction Viewer Screen will appear:
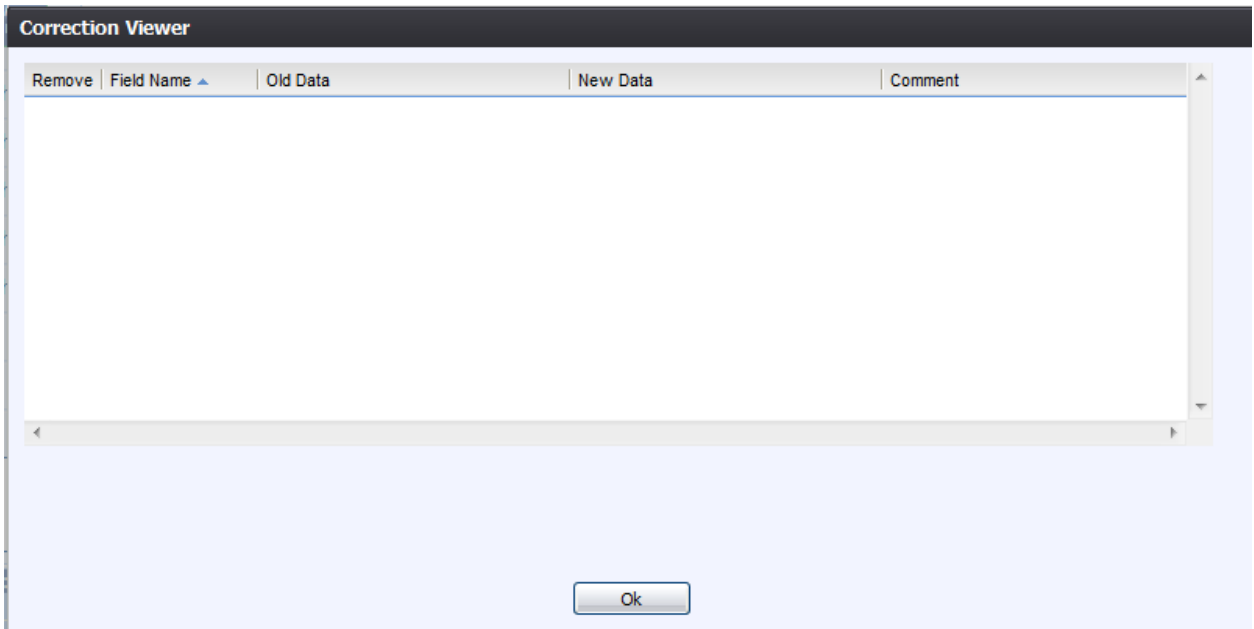
Figure 122: Correction Viewer Screen

8   Legal View Functions

This section provides detailed information about the Local features of the **TxEVER Death** module regarding record processing and related features available from the **Legal View** screen.
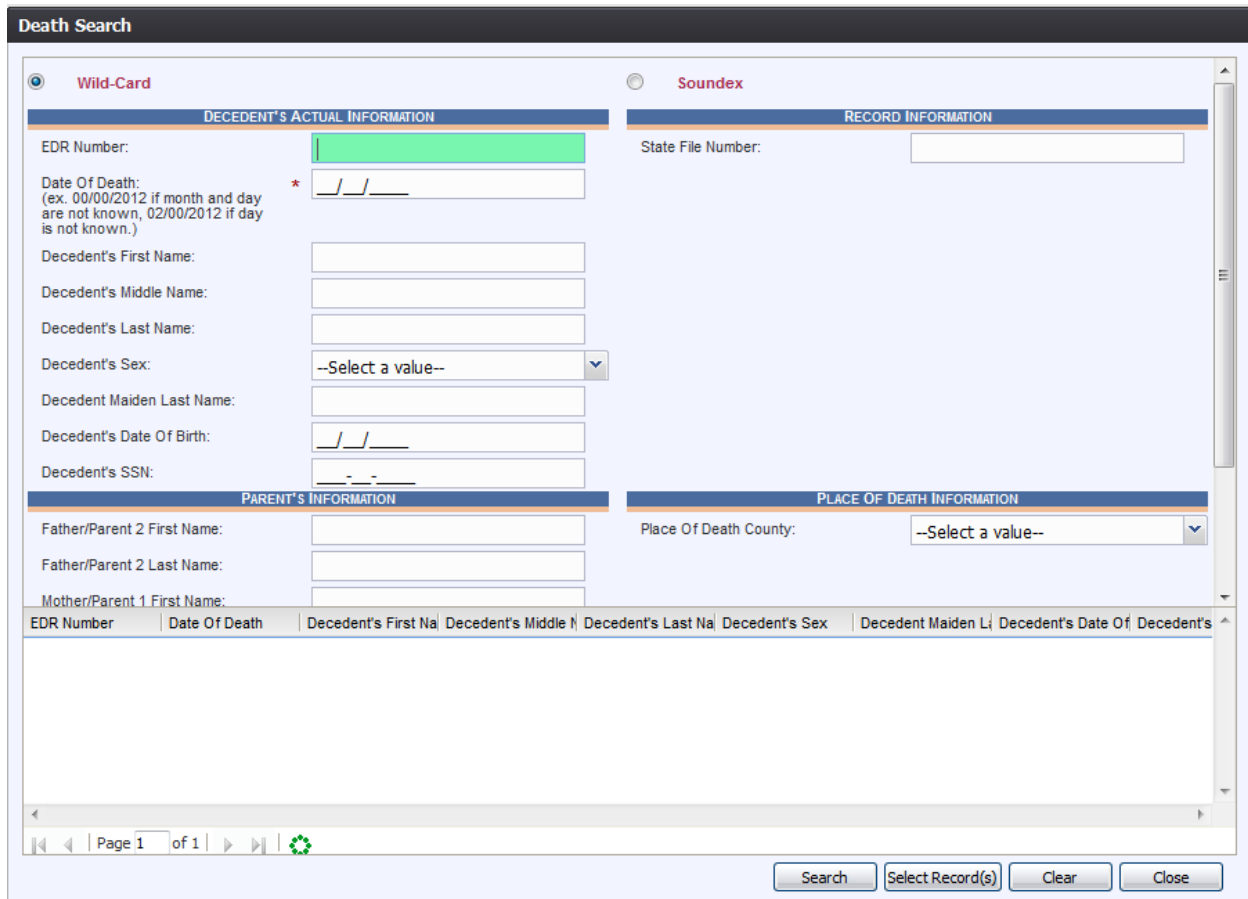
8.1   Access Legal View

Access the **Legal View** screen by selecting the **Death/Function/Legal View** menu item from the **Death** main menu.

8.2   Legal View Search Screen

The **Legal View Search** screen is similar to the **Search** screen available from **Death Registration**. Records available for retrieval from the **Legal View Search** screen will only be those records that have been registered and assigned a Local File Number, records that have been voided, and records that have been abandoned.

To retrieve a record from the **Legal View Search** screen:

1. Go to **Death/Function/Legal View**.

2. On the **Legal View** screen, select the **Record/Search** menu item or the 🔍 icon. The **Legal View Search** screen will appear.

Figure 123: Legal View Search Screen

3. Enter all available information regarding the record.

✓ **Tip**: Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.

✓ **Tip**: Along with a name, including the year of death and gender and other information will reduce the number of matches that are returned and cause the search to be faster.

✓ **Tip**: Entering only a key field such as the EDR or Social Security Number will match a single record and result in a rapid response.

✓ **Tip**: Choosing 'Soundex' still requires the user to enter at least the newborn's year of birth. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound familiar as well.

4. Click **Search** to search the database.

Records that match the search criteria will load in the grid in the lower half of the screen.

Figure 124: Legal View Search Screen with Results

5. Click on the appropriate record to select it. Select multiple records by holding down the Ctrl key and clicking on multiple records.
6. Click **Select Record(s)** to retrieve record(s) to the Work Queue.
7. Select a record from the work queue by clicking on it to retrieve it to the screen.
8. The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional processing.

8.3   Printing from the Legal View Screen

The **Print** function allows users with the proper security process to print certified copies of death records from the application.

1. Select the **Death/Function/Legal View** menu item once successfully logged into the proper location.

2. Select the **Record/Search** menu item to retrieve records

3. Retrieve the record for printing from the work queue.

4. When the record is loaded on screen, select the **Record/Print/Certificate of Death (Certified)/Certified Death Certificate**

5. The certified copy of the death certificate will load in PDF format in a new browser window.

6. Print the document from the browser window and then close the browser window to return to the application.

> The state user can print the following types of forms and certificates depending on what type of record is retrieved on the **Legal View** screen:
>
> - Un-Certified Death Certificate
>
> - Un-Certified Death Certificate – Small
>
> - Certified Death Certificate
>
> - Certified Death Certificate – Small
>
> - Delayed Death Certificate

8.4   View/Print Net-Change History

Following the registration of a record, all subsequent changes made to the record will be stored in a net-change history that can be viewed/printed at any time from the **Legal View** screen.

To view/print a record's net-change history:

1. Go to **Function/Legal View** menu item from the **Death** main menu to access **Legal View**.

2. Retrieve the record on which to view/print the net-change history through the **Legal View Search** screen.

3. When the record is on-screen, select the **Record/View/Print Net-Change History** menu option.

The following screen will appear:

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

Figure 125: Net Change History Screen

4. Click Print to print the net-change history of the selected record.

8.5   Corrections and Amendments

Corrections and **Amendments** allow for authorized Local users to initiate necessary changes to the data values on death records following registration.

8.5.1   Corrections

To access **Corrections**:

1. Open the **Legal View** screen by selecting the **Function/Legal View** menu option from the **Death** main menu.

2. Retrieve a record to the **Legal View Search** screen to bring it into the **Unresolved Work Queue**.

3. Once the record is on the screen, select the **Record/Corrections** menu item and then select the following sub-menu item:

   a. Statistical Correction

4. The record will open in the correction screen:

Figure 126: Main Correction Screen

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

Figure 127: Correction Screen

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

7. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon or **Upload Document** icon .
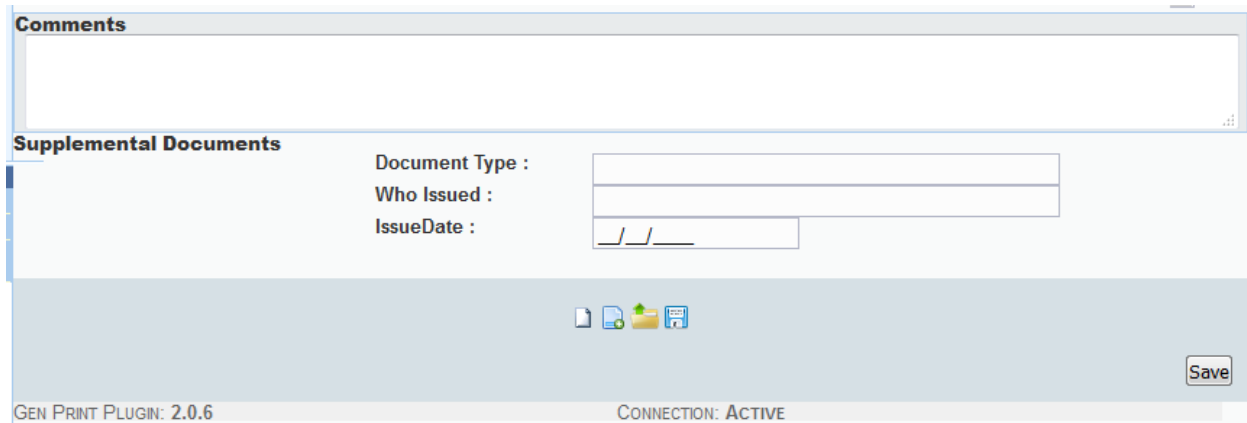
Figure 128: Supplemental Documents Section

Note: If the Local user does not intend to scan in any supporting documentation, they can click the **Save Document without Scan** icon 🖫 after entering a corrected value in the **New Data** section.

8.5.1.2.1 Scan Supporting Documentation

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon 📄 .
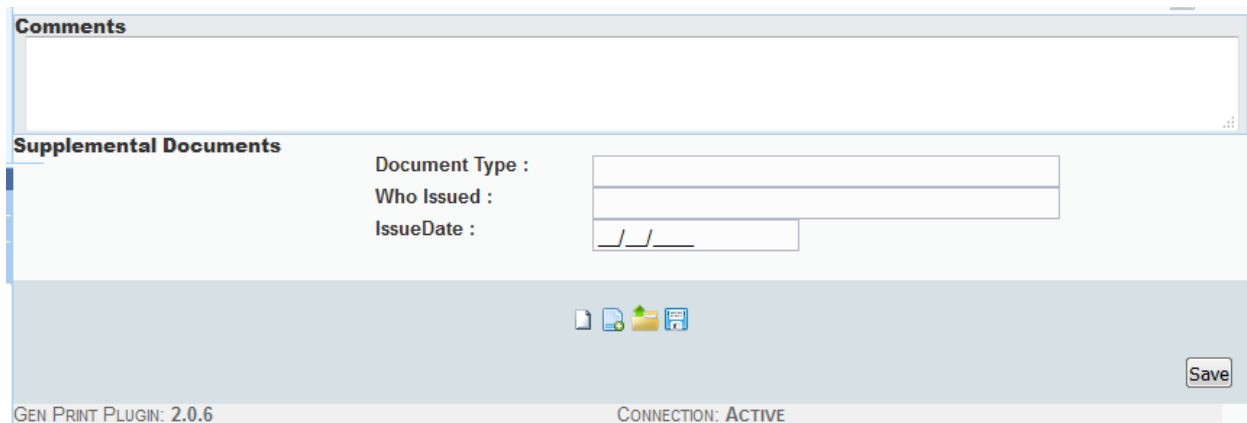

Figure 129: Supplemental Documents Information Screen

If the user does not intend to scan in any supporting documentation, they can click the **Save Document without Scan** icon 🖫 after entering a new value in the **New Data** section.

2. The **Scan Documents** window will appear.

Figure 130: Scan Documents Window

5. Enter a description of the document being scanned, choose a scanner from the List of Scanners drop-down, and select a Scan Type.

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

> After the scanning process has been completed, a preview of the scanned document will load in the scanned image area of the window.

7. Click the **Save Document** button to save the document.

8. Click the **Close** button to close the Scan Documents window and return to the QA Audit Review Corrections Screen

9. The user can choose to scan more supporting documentation by clicking the **Scan Another Document** icon ⬛ and completing the scanning process again.

10. Save the changes by clicking the **Save** button in the **New Data** section of the **Corrections** screen.

8.5.1.2.2 Upload Supporting Documentation

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Upload Document** icon.
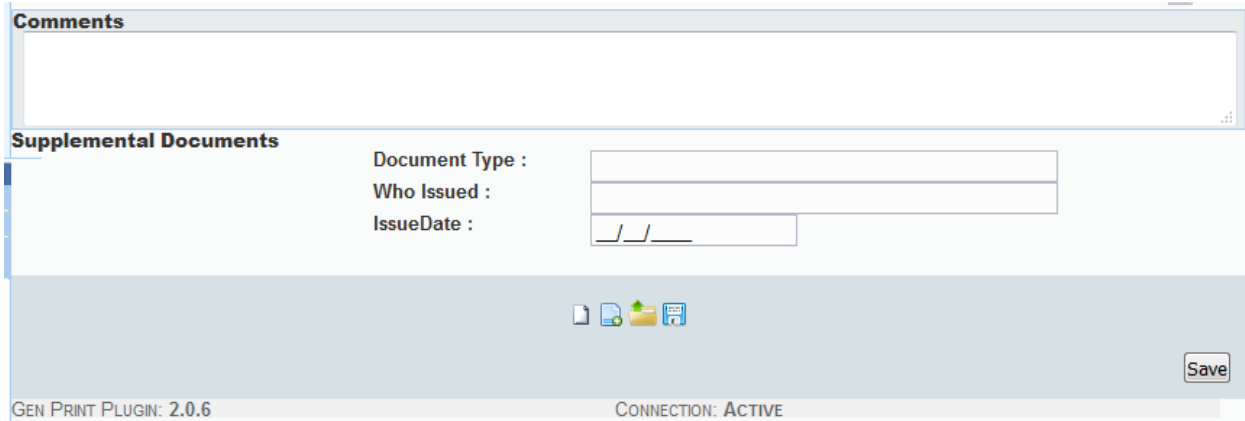

Figure 131: Supplemental Documents Section

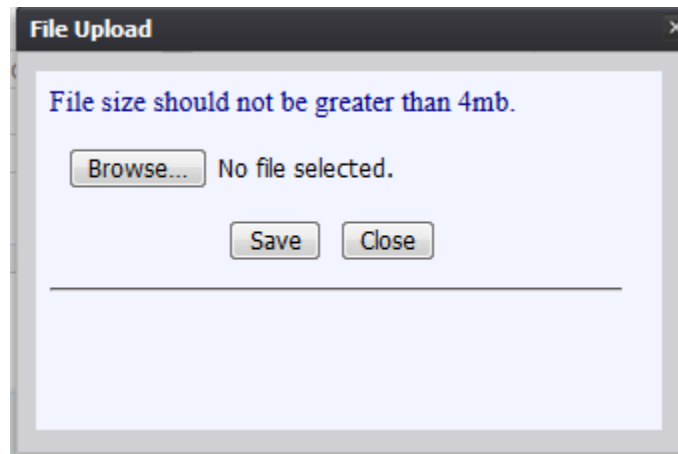2. The **File Upload** screen will appear.

Figure 132: File Upload Screen

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

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

5. The **File Upload** screen will appear as seen below:
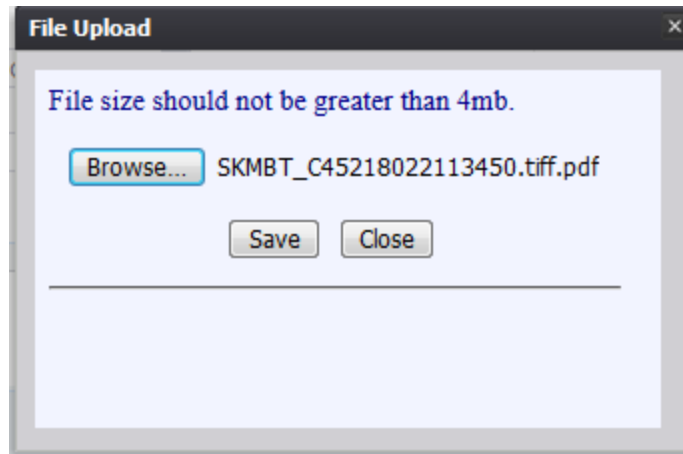
Figure 133: File Upload Screen with File Selected

6. Click the **Save** button.

7. A message will appear letting the user know the document information has been saved successfully.

8. Click **OK** to close the message.

9. Save the changes by clicking the **Save** button in the **New Data** section of the **Correction**s screen.

10. Click the **Accept** icon ✔ or select the **Process/Accept** menu item. The following message will appear:

Figure 134: Record Submission Confirmation Message

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

  b. Click **No** to cancel submission of the record.

11. The following message will appear:

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

    d. Click **No** to decline submitting the record as high priority.
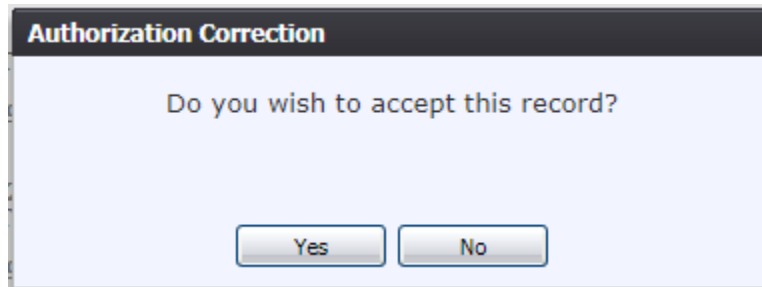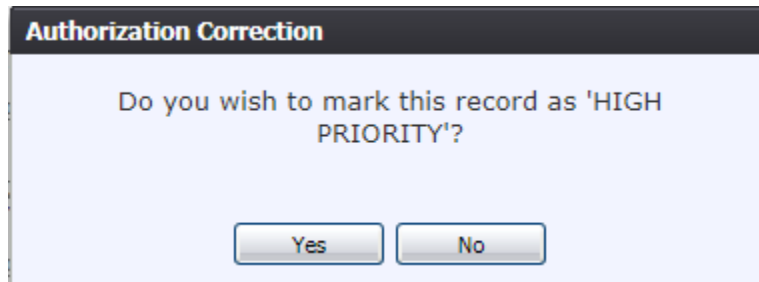
12. A message will appear that the record has been saved successfully.

A correction may be cancelled at any time up until it is accepted or submitted in the **Corrections Review** process.

To cancel corrections, click the **Exit** icon   or select the **Process/Exit** menu item to return to the **Legal View** screen.

8.5.2 Amendments

To access **Amendments**:

1. Select the **Function/Legal View** menu option from the Death Application main menu to go to **Legal View**.
2. Retrieve a record on which to make an amendment using the **Legal View Search** screen to bring it into the Unresolved Work Queue.
3. Once the record is on the screen, select the **Record/Amendments** menu item and then select the following sub-menu item:
    a. Legal Amendment

4. The record will open on the appropriate amendment screen, as shown below:

Figure 136: Main Amendment Screen (Legal Amendment)

5. After coming to a field that needs to be amended, click the **Edit** icon located next to the appropriate field.

The following screen will appear:

Figure 137: Amendment Screen

6. Enter the amended values into the fields provided for entry of the new value. Old and New Data will both be displayed on the screen.

8. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon or **Upload Document** icon .
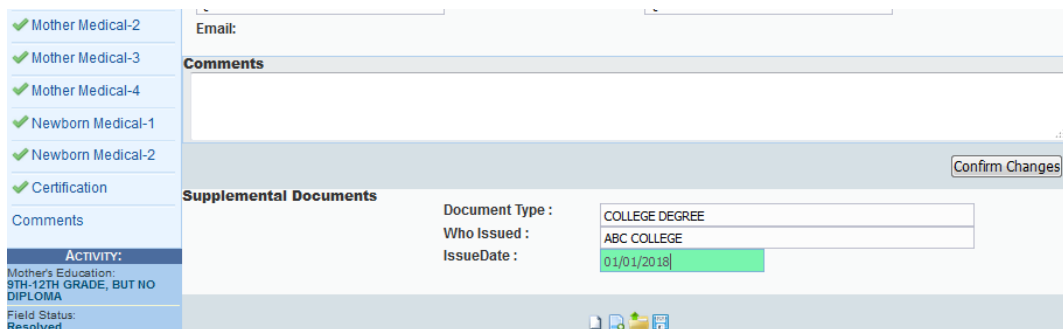
Figure 138: Supplemental Documents Section

Note: If the Local user does not intend to scan in any supporting documentation, they can

click the **Save Document without Scan** icon 🖫 after entering a corrected value in the **New Data** section.

9. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Scan Document** icon ▯.

Figure 139: Supplemental Documents Section with Details Entered

If the user does not intend to scan in any supporting documentation, they can click the **Save Document without Scan** icon 🖫 after entering a new value in the **New Data** section.

3. The **Scan Documents** window will appear.

Figure 140: Scan Documents Window

11. Enter a description of the document being scanned, choose a scanner from the List of Scanners drop-down, and select a Scan Type.

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

> After the scanning process has been completed, a preview of the scanned document will load in the scanned image area of the window.

13. Click the **Save Document** button to save the document.

14. Click the **Close** button to close the Scan Documents window and return to the QA Audit Review Corrections Screen

15. The user can choose to scan more supporting documentation by clicking the **Scan Another Document** icon and completing the scanning process again.

16. Save the changes by clicking the **Save** button in the **New Data** section of the **Corrections** screen.

1. Add any supporting documentation at this time by completing the fields in the **Supplemental Documents** section located at the bottom of the screen and then click the **Upload Document** icon.

Figure 141: Supplemental Documents Section with Details Entered

2. The **File Upload** screen will appear.
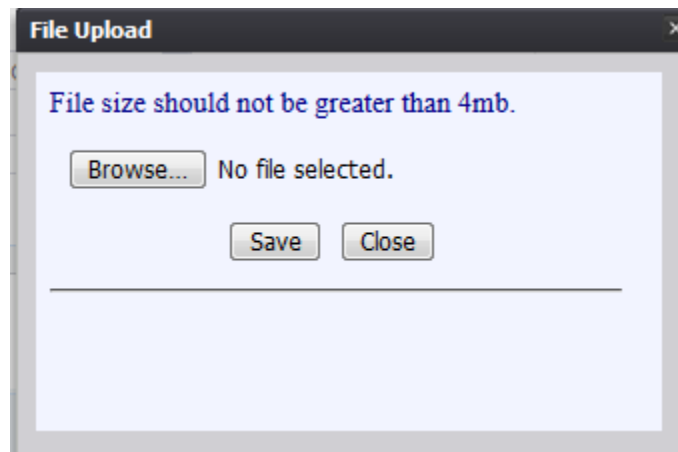
Figure 142: File Upload Screen

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

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

5. The **File Upload** screen will appear as seen below:
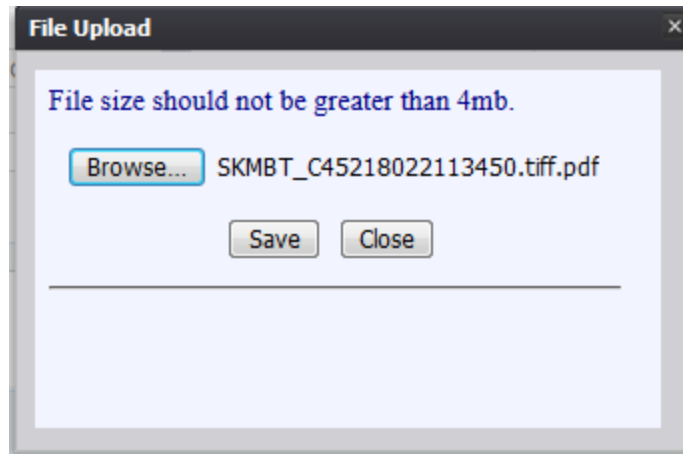
Figure 143: File Upload Screen with File Selected

6. Click the **Save** button.

7. A message will appear letting the user know the document information has been saved successfully.

8. Click **OK** to close the message.

9. Save the changes by clicking the **Save** button in the **New Data** section of the **Correction**s screen.

13. Click the **Accept** icon ✔ or select the **Process/Accept** menu item. The following message will appear:
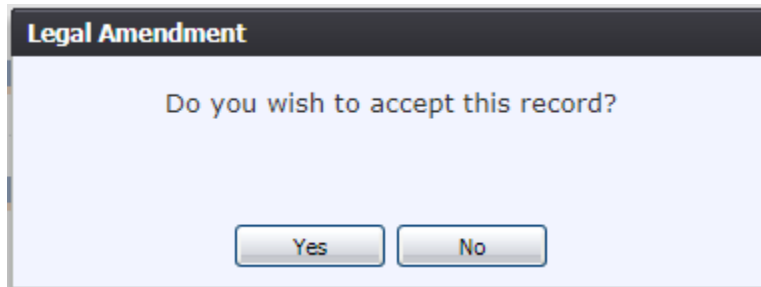
Figure 144: Record Submission Confirmation Message

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

   f. Click **No** to cancel submission of the record.

14. The following message will appear:
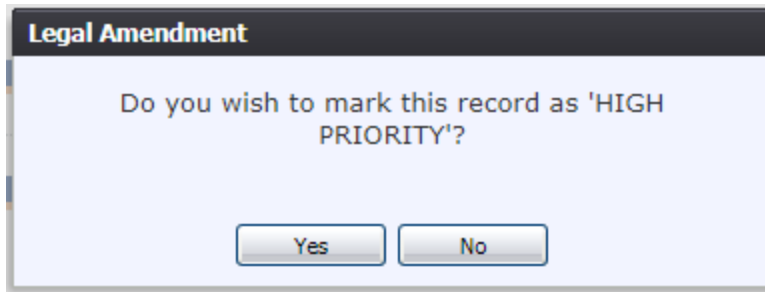
Figure 145: High Priority Submission Confirmation Message

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

    h. Click **No** to decline submitting the record as high priority.

15. A message will appear that the record has been submitted successfully.

An amendment may be cancelled at any time up until it is accepted or submitted to the **QA Legal Amendment Review** process.

To cancel an amendment and return to the **Legal View** screen, click the **Exit** icon or select the **Process/Exit** menu item. Any amendments made to the record but not saved will be cancelled.

9   Extracts

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

9.1   Local Batch File

To schedule the Local Batch File:

1. From the Death Menu, select the **Tools/Extracts/Local Batch File** sub-menu. The extract criteria screen will open.

2. Enter/select all criteria on the screen:

Figure 146: Local Extract Configuration Screen

3. Click the **Save** button.

4. The application will issue a message that the configuration has been saved successfully.
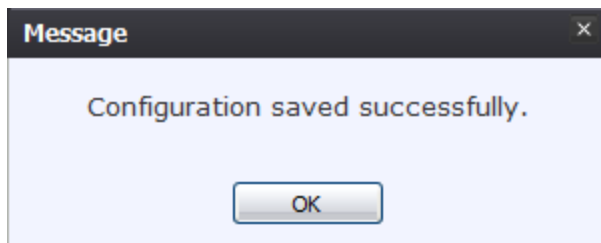
Figure 147: Configuration Saved Successfully Message

5. Click **OK** to close the message.

Note: Extract files will need to be retrieved and downloaded using the Extract File Downloader screen.

9.2 Interstate Jurisdiction Exchange (IJE) Extract

The **IJE Extract** is a monthly scheduled and on-demand process that provides records to other participating states for decedents that died in Texas but are not residents in Texas. The scheduled process will create files and save the files to pre-defined folders for each state. The on-demand process allows the state of Texas to select files according to date range, event type, and state. The extracted file is in the standardized NAPHSIS Interstate Jurisdiction Exchange STEVE file format. There are two IJE Extracts:

- IJE STEVE – The decedent's state of residence is not Texas.

- IJE ROSTER – The decedent's state of birth is not Texas.

To generate the Interstate Jurisdiction Exchange Extract on demand:

1. From the Death Menu, select the **Tools/Extracts/Interstate Jurisdiction (IJE) Extract** sub-menu and select **IJE STEVE** or **IJE ROSTER**. The extract criteria screen will open.

2. Enter/select all criteria on the screen:

Figure 148: Interstate Jurisdiction Exchange Extract – STEVE

Figure 149: Interstate Jurisdiction Exchange Extract - ROSTER

3. Click the **Generate** button.

4. The application will issue a message that the extract has generated successfully.
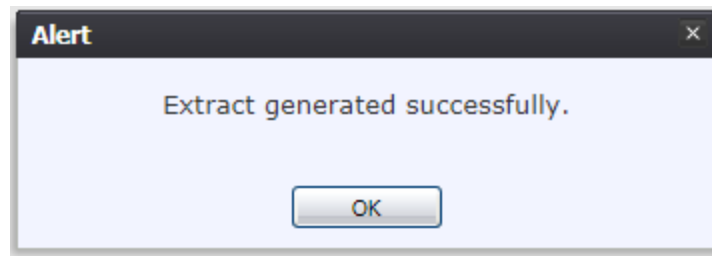
Figure 150: Extract Generated Successfully Message

5. Click **OK** to close the message.

Note: Extract files will need to be retrieved and downloaded using the Extract File Downloader screen.

9.3 Voter Abstract Extract

1. From the Death Menu, select the **Tools/Extracts/Voter Abstract Extract** sub-menu. The extract criteria screen will open.

2. Enter/select all criteria on the screen:
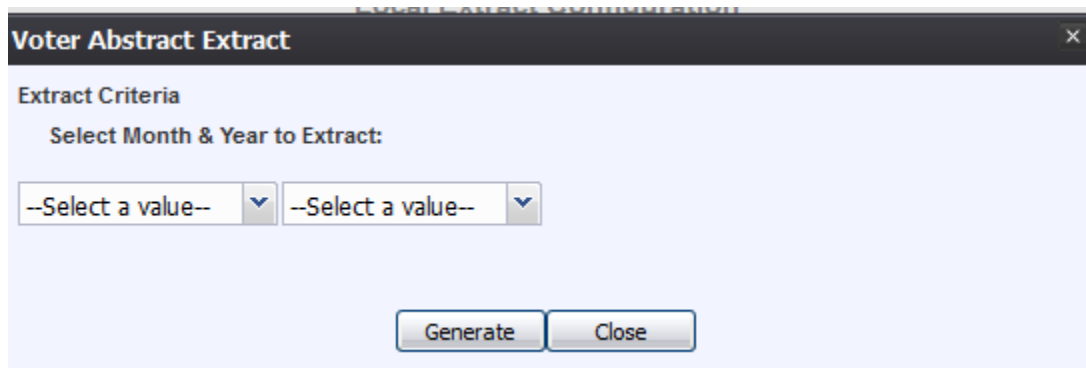
Figure 151: Local Extract Configuration Screen

3. Click the **Generate** button.

4. The application will issue a message that the extract has generated successfully.
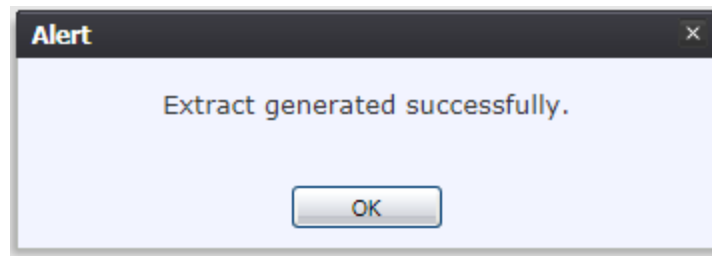
Figure 152: Extract Generated Successfully Message

5. Click **OK** to close the message.

Note: Extract files will need to be retrieved and downloaded using the Extract File Downloader screen.

9.4 Extract File Downloader

The Extract File Downloader screen in the Death module provides users with the functionality to download the extracts that are uploaded to the server.

From the Death Home page, go to **Tools/Utilities** and then select either the Local Batch File Downloader or the Voter Abstract Extract sub-menu item to open the desired Extract File Downloader screen
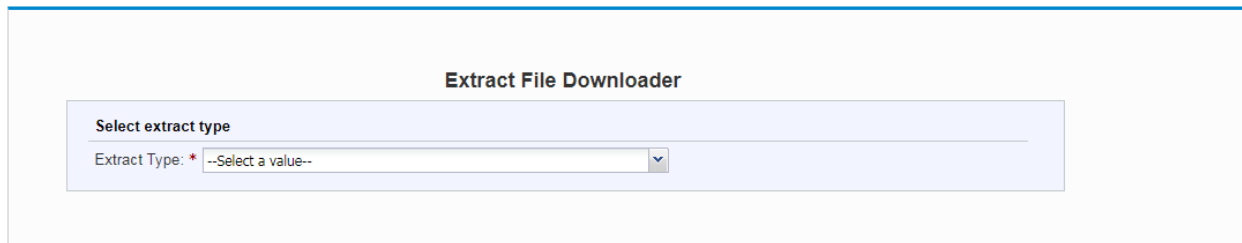
Figure 153: Extract File Downloader Screen

9.4.1 Retrieve Extract Files

Select the Extract Type from the **Extract Type** drop-down. The Extract File Download Screen grid will populate with extracts available for download.
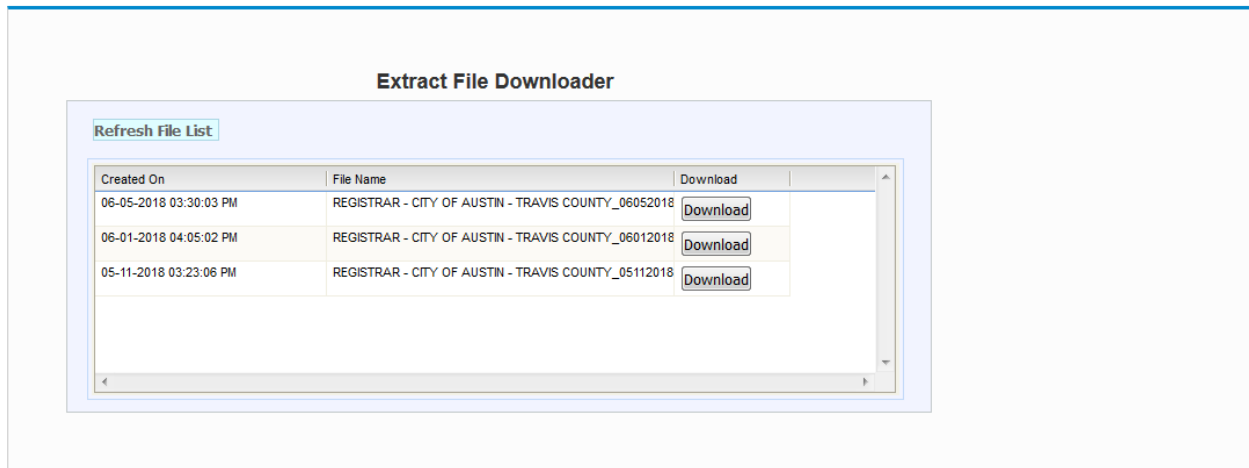
Figure 154: Extract File Downloader Grid

Click the **Download** button for the desired extract file. This will cause the system to generate the Download File screen.

10 Reports

Reports available in the **Death** module include:

- Birth Death Matching-Matched Reports
- Death Records – Filed by Local Registrar Location
- Death Records – Filed by Medical Certifier Location
- Demographic Amended Records Report
- Facility Delinquent Report (Uncertified)
- Fatalities by County by Month Report
- Funeral Director Report
- Local Registration – Suicide Reporting
- Medical Certifiers – Jurisdictional Manner of Death Reporting (ME)
- Pending Cause of Death Listing
- Permit Issuance Report
- Productivity Report – Local Registrars
- Productivity Report – County

10.1 Running a Report

1. From the Death Homepage, select the desired report from the Reports menu. A report options screen will appear:
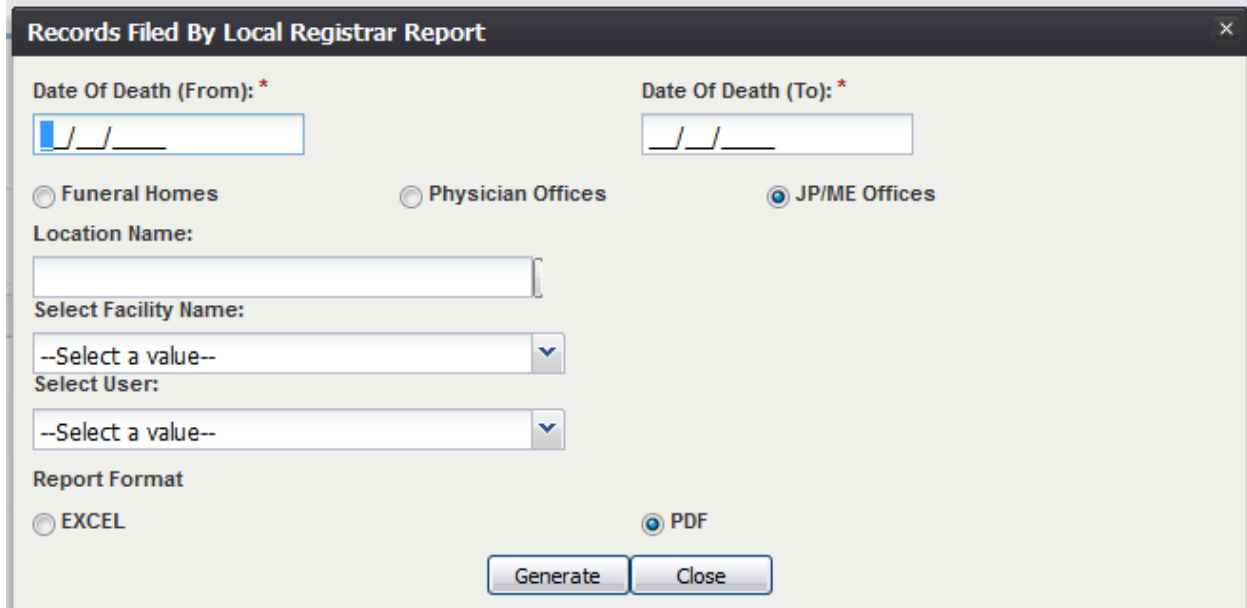
Figure 155: Report Options Screen

2. From this point, enter search criteria, select the file output type, and then click **Generate**.

   Note: Similar to previous screens, fields marked with red asterisks (*) are mandatory fields and must be resolved in order for the report to generate.

3. Generating a report as a PDF will automatically process the report and open it in a separate window.

4. If **Excel** is selected as the output file type, the file will be downloaded and must be opened manually by the user.

   Note: If the entered search information does not pull a report that can display any of the requested data, a page indicating that the user needs to try a different search, or alter the search information will generate.

10.1.1 Birth Death Matching – Matched Records Report

The **Birth Death Matching – Matched Records** report provides a list of death records that were matched to birth records automatically and manually. The report lists a total percentage and number of records matched. To access this report, go to **Reports/Birth Death Matching – Matched Records**.

10.1.2 Death Records – Filed by Local Registrar Location Report

The **Death Records – Filed by Local Registrar Location** report is a listing of all records filed by a specific local registrar location. To access this report, go to **Reports/Death Records – Filed by Local Registrar Location Report**.

10.1.3 Death Records – Filed by Medical Certifier Location Report

The **Death Records – Filed by Medical Certifier Location** report is a listing of all records filed by a specific medical certifier location. To access this report, go to **Reports/Death Records – Filed by Medical Certifier Location Report**.

10.1.4 Demographic Amended Records Report

The **Demographic Amended Records** report provides information on all records which had demographic amendments made, as well as what information was changed. To access this report, go to **Reports/Demographic Amended Records**.

10.1.5 Facility Delinquent Report (Uncertified)

The **Facility Delinquent Report (Uncertified)** provides information delinquent un-certified records from all facilities or a selected facility. To access this report, go to **Reports/Facility Delinquent Report (Uncertified).**

10.1.6 Fatalities by County by Month Report

The **Fatalities by County by Month** report provides information on the fatalities that occurred in a set county during a set period of time determined by the user. To access this report, go to **Reports/Fatalities by County by Month Report**.

10.1.7 Funeral Director Report

The **Funeral Director Report** provides information on which funeral directors signed off on records, as well as county of death and type of disposition. To access this report, go to **Reports/Funeral Director Report**.

10.1.8 Local Registration – Suicide Reporting

The **Local Registration – Suicide Reporting** report provides a listing of all suicides registered within a certain county, with de-identified information. To access this report, go to **Reports/Local Registration – Suicide Reporting**.

10.1.9 Medical Certifiers – Jurisdictional Manner of Death Reporting (ME)

The **Medical Certifiers – Jurisdictional Manner of Death Reporting (ME)** report provides a list of records registered by medical certifiers in a specific area including manner of death. To access this report, go to **Reports/Medical Certifiers – Jurisdictional Manner of Death Reporting (ME)**.

10.1.10 Pending Cause of Death Listing

The **Pending Cause of Death Listing** provides a list of all records with a pending cause of death with the option to filter by county, local, and facility. To access this report, go to **Reports/Pending Cause of Death Listing**.

10.1.11 Permit Issuance Report

The **Permit Issuance Report** displays all Burial Permit Reports issued with the option to select a specific facility. To access this report, go to **Reports/Permit Issuance Report**.

10.1.12 Productivity Report – Local Registrars

The **Productivity Report – Local Registrars** report provides information regarding all death records registered in a local registration district. To access this report, go to **Reports/Productivity Report – Local Registrars**.

10.1.13 Productivity Report – County

The **Productivity Report - County** report provides information regarding all death records registered in a selected county. To access this report, go to **Reports/Productivity Report - County**.

11 Approvals

Sign-off Sheet

I have read the above TXEVER Death Module Local User Guide and accept the contents herein written.

Project Sponsor: _____

Date

Senior Project Manager: _____

Date

Genesis Project Manager: _____

Date