Funeral Home Training Exercises

October 2020

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Exercise 1: Logging Into DRIVE

Skills Learned: in this exercise, you will learn how to log into the DRIVE (Database Registration of Indiana’s Vital Events) Application:

1. You will access DRIVE through Access Indiana: https://www.in.gov/access/. Select the Access Indiana icon on your desktop or select the Access Indiana Favorite (Bookmark) from within your web-browser.

2. Enter Email and select Continue.

3. Click the DRIVE icon, and it will take you to the DRIVE landing page.
4. If your **User Name** is associated with more than one office or location, then you must also make a selection from the **Office:** dropdown list, shown below:

You should now be logged into the **DRIVE** application where the **Main Menu** and **Fast Links** sections are displayed:
Exercise 2: The Messages Pane
Skills Learned: Basic Navigation within the Messages pane

One fast link that appears when you first login to the DRIVE application is the Messages Link. Some Messages are messages sent from User to User, while others are system generated and appear with no interaction from the user.

The Messages pane is a grid control that displays all of the messages that have been sent to the current office (the office selected at login). To read a message, click on the underlined link in the From column. The Message Text column displays all or a portion of the text of the message that was sent. Date Sent displays the date and time the message was sent. Notice that the Remove from List button is grayed out.

1. Click on any of the underlined links in the From column of the Messages pane to read that particular message.

2. The Message window is a popup that appears on top of the main DRIVE page. After the Message has been read, click the Close button.
3. Place a checkmark in the checkbox next to the **Date Sent** column header.

Notice that the **Remove from List** button is now active.

Do not click on the **Remove from List** button unless you are sure you want to remove all of these messages from the list.

**Note:** Deleted messages cannot be restored. Do not delete messages unless you are sure that you will not need them.

4. Remove the checkmark from the checkbox next to the **Date Sent** column header and place a checkmark in any of the boxes next to a single message.

Now click the **Remove from List** button to remove a single message from the list.

Again, once removed, messages cannot be restored.
**Exercise 3: Logging out of the DRIVE Web-Base Application**

Skills Learned: Logging out of the DRIVE application. Logging out of DRIVE will NOT log you out of Access Indiana.

1. From the **Main Menu** select **Main -> Logout**.

2. You will be prompted to **“Click OK to exit application”**. Click the **OK** button to exit. If you do not want to logout of the application, click the **Cancel** button, instead.

You can also directly select the **Logout Button**, always displayed and located in the far upper right of the screen.

If you select this option for logout, you will not be receive the “**Click OK to exit application**” prompt. You will simply be logged out.

3. Logging out of **DRIVE** will **NOT** log you out of Access Indiana.
**General Death Registration Page Functionality**

**Page Controls and Navigation**

**Skills Learned:** In these exercises you will learn how to navigate through DRIVE using the various controls and icons provided. Mastery of these controls will speed you on your way to more efficient death record processing. The following exercises are designed to help you gain that mastery.

**Exercise 1: Dropdown Lists**

Dropdown lists provide you with a pre-defined list of choices. This eliminates the need to manually type in data, prevents inappropriate items from being entered, prevents spelling errors.

1. One of the first dropdown lists you are likely to encounter is the **Sex** dropdown list on the main **Start/Edit New Case** page. To view all items in the list simply click on the down-arrow on the right side of the control.

![Sex dropdown list](image)

2. Notice that clicking on the down arrow will reveal the list of items that can be selected from that control. Some dropdown lists will have more selectable items than can be displayed on one page. In those cases, a scroll bar will appear on the left side of the list.

3. It’s possible to select an item from the list without actually dropping the list down. If you already know the item you want to select, just tab to the dropdown and type the first letter in the name of the item.

![Female selection](image)

**If more than one word in the list starts with the same letter, typing that letter again will scroll through the list for you.**
4. Once the list is highlighted, it is possible to navigate up and down through the list using the directional arrow keys on your keyboard. You can tell a list is highlighted by the blue shading that is placed around the outside of the field.

Not Highlighted:   Highlighted:

With the list highlighted and ‘Female’ selected, press the down-arrow button on your keyboard.

Pressing the down-arrow with ‘Female’ highlighted scrolls down the list to ‘Male’. Now press the up-arrow button.

Pressing the up-arrow with ‘Male’ highlighted scrolls back up the list to ‘Female’.
## Exercise 2: Standard Date Format

**Skills Learned:** In this exercise you will learn how to properly key dates into the DRIVE system. While processing death registrations, you will frequently be inputting dates. DRIVE allows you much flexibility in using several different date formats:

are illustrated below:

<table>
<thead>
<tr>
<th>Input Formats</th>
<th>Typed As</th>
<th>System Converts to</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM-DD-YYYY</td>
<td>02-05-2014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>02/05/2014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>MMDDYYYY</td>
<td>02052014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>MonDDYYYY</td>
<td>Feb052014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>Mon/DD/YYYY</td>
<td>Feb/05/2014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>Mon-DD-YYYY</td>
<td>Feb-05-2014</td>
<td>Feb-05-2014</td>
</tr>
</tbody>
</table>

In all cases you must use 2 digits each for Month and Day and 4 digits for Year. The only exception is the MonDDYYYY format that allows you to enter a 3-letter abbreviation for the Month. The MonDDYYYY format also supports Mon/DD/YYYY and Mon-DD-YYYY formats.
**Exercise 3: Using Calendars**

**Skills Learned:** In this exercise you will learn how to use the Calendar control to input dates without typing them in manually.

1. In addition to manual date entry, you can also click on the Calendar icon next to a date entry box to bring up a Calendar control.

2. By default, the current Month, Day and Year are pre-selected. The current month is pre-selected in the Month dropdown list, the current year is pre-selected in the Year dropdown list and the current day is highlighted in red. As with other drop-down lists we have seen, clicking on the down-arrow next to the month control (January, in this example) will reveal all the items in the list.

3. Once we have selected the correct Month and Year, clicking on the Day of the month will auto-populate the Date for us.

In addition to manually dropping down the list, we can just type the first letter of the month we are interested in or use the up and down arrows on the keyboard to scroll through the list until we find the month we want to select.

**Keyboard Shortcut:** Once a date control has been selected or tabbed into, pressing the f12 key will automatically place the current system date into the control.
Exercise 4: Lookup Controls

Skills Learned: In this exercise you will learn how to use Lookup Controls. Lookup Controls are searchable lists that display a grid of selectable data.

1. The Lookup Icon is a control displayed as a small magnifying glass next to fields in which a lookup can be performed. Wherever a Lookup Icon is displayed an Eraser Icon control is also displayed.

2. Selecting the Lookup Icon will display a pop-up control to search for a value that should be entered into the select field. For example, selecting the Place of Death Lookup Icon, will display the Lookup Place of Death Facility pop-up.

3. A Facility Name is should be entered into the search field. Wildcard searches can be used for Lookups. Simply enter a % at the end of the search criteria to perform a wildcard search. In the below example I entered “indiana%” and selected Search, which returned a data grid of results for facility names which start with “Indiana”.

4. Select a facility. Notice all controls on Place of Death are now auto-filled.
Exercise 5: Registration Status Bar

Skills Learned: In this exercise you will learn about the Registration Status Bar. The Registration Status Bar helps you keep track of missing data that can prevent a death record from being properly registered. It’s also a valuable tool for tracking the status of a death case.

1. The Registration Header can be viewed from any of the pages of information in the Death Registration Menu. Simply locate the blue bar at the top of the information window that displays the case number, decedent name and date of death.

2. The DRIVE application provides work flow and data quality management through the assignment of statuses. The death registration process involves many steps that are completed by several parties. In order to track these steps the DRIVE system assigns one or more statuses to the record when an action is performed (e.g. Select the validate page button) or event occurs (e.g. cremation clearance required).

The initial status assigned to a new electronic case is New Event/New Event/Not Registered/Unsigned/Uncertified/NA. (The status shown in the example above.) The goal of all parties in the registration process is to obtain a ‘perfect’ status. A perfect status would indicate the highest data quality and completion of all steps in the registration process. Sometimes a death record may contain values which are valid however cause soft edit rule failures, therefore it is also possible to have a registered record have a Personal Valid with exceptions or Medical Valid with exceptions status or any combination of valid and valid with exceptions.
Exercise 6: Validate Page and the Validation Frame

Skills Learned: In this exercise you will learn how to validate death records and prepare them for registration.

1. Once you’ve entered information into the system you can validate that information by clicking on the **Validate Page** button.

   ![Validate Page Button](image)

   When you click on the **Validate Page** button, the **Validation Frame** will list all of the errors associated with that page. The list of Validation Results specific to data entry issues regarding the page will be displayed directly below the **Validate Page, Next, Clear, Save and Return** buttons.

   ![Validation Results](image)

   The fields on the specific page which contain errors will be highlighted. Those highlighted in red must be corrected before the record can be signed or certified and registered.

   ![Pronouncement](image)

2. If you click on the **List All Errors** button the system will display all errors associated with the entire death case, including those errors which exist for the current page.
3. Notice that the **List All Errors** button has now become the **List Page Errors** buttons. Clicking this button will reduce the list to those errors associated only with the currently displayed page.

4. If you want to hide the displayed list of errors then just click on the **Hide** button. Just re-click on the **Validate Page** button to view the errors again.

5. To fix an error, click on the **Fix** button in the **Goto Field** column. This will place the cursor or focus in the field that needs to be corrected. Use this option if you are on a page with many errors to correct.

- **Focus** determines which onscreen element is the target of action. If a text box ‘has the focus’ then anything typed on the keyboard appears in the text box. If a dropdown list ‘has the focus’ the down-arrow will open the list and the up-arrow will close the list.

6. Another method of correcting mistakes is to click on the **Fix** button in the **Popup** column…
7. Correct the error and click the **Save** button to submit your changes. The popup will close and your changes to the item will now be displayed on the page. Click the **Close** button if you want to close the popup without making any changes.

8. Sometimes, a death registration can be processed even with certain errors present in the registration. In those cases, a checkbox will be provided in the **Override** column.
9. Put a checkmark (✓) in the **Override** box and click the **Save Overrides** button. This allows you to process a death registration even if some errors are present.

**Important Note: Not all errors can be overridden!**

10. There are two types of errors in **DRIVE**: Hard and Soft. Hard edits are highlighted onscreen in red. Soft edits are highlighted in yellow. In the example below we have used a lower-case 'n' for middle initial and left out the last name entirely.

You may have noticed that certain pages on the Death Registration Menu are marked with either a red x, yellow caution sign or green checkmark.
These colored shapes are your indication as to which pages contain errors and which pages are complete.

For example, pages marked with a red arrow  ❌ contain hard edits that must be corrected before registration can be completed.

Pages marked with a yellow error  ○ contain errors that can be overridden or errors that have already been overridden.

Pages marked with a green arrow  ✔ contain no errors.

Once you have clicked the Validate Page button on any page the system will evaluate all pages and mark them accordingly with the red, yellow or green arrows.
**Start/Edit New Case**

**Skills Learned:** In this exercise you will learn how to use the *Personal Information* pages of the DRIVE™ application to process and sign a death record.

**Exercise 1: Decedent Page**

1. From the Main Menu, select *Life Events -> Death -> Start/Edit New Case*.

2. This will bring up the *Start/Edit New Case* page. Notice that *First:*, *Last:*, *Date of Death:*, and *Sex* are all marked with red arrows( ). Fields with a red arrow next to them are required entries and must be completed before you will be allowed to perform a search.

3. Once you have filled in the required items, click the *Search* button to proceed or, if you need to, click on the *Clear* button to clear all entries and start over.

4. If no matching records are found, you will be allowed to begin creating a new record by clicking the *Start New Case* button. To begin a new search, click the *New Search* button...

5. If a matching event was found, as would be the case when a funeral home was completing a case started by a medical facility or physician, click on the underlined link in the *Decedent’s Name* column.

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**Note:** Before you will be allowed to create a new Death Record you must first search for an existing record. This is to prevent the creation of duplicate Death Records.
To initiate a new search using different criteria, click on the New Search button.

6. For the purposes of this exercise, select Start New Case.

**Note:** All of the column headers on the Results page are underlined links. Clicking on any of these links will resort the table data accordingly.

7. Clicking on the Start New Case button will display the Decedent page, as shown below. The Death Registration Menu expands down the left side of the case.

8. **Will coroner be responsible for final disposition?** defaults to No. This option is greyed out and can only be changed by a coroner who will be fully responsible for completion of the record.

9. Complete the Decedent page. First, Middle, and Last are self-explanatory. Suffix is used to capture generational suffixes such as Jr., III, etc....

10. If the decedent is a married female, then place her original maiden name before her first marriage in the Decedent Maiden Name control.
11. If the decedent was known by more than one name then click the **Add/Edit Alias Names** on the **Aliases** section.

    **Aliases**
    **Add/Edit Alias Names**

    This will launch the **Aliases** pop-up page:

    ![Aliases pop-up page]

    To add a new alias, click the **New Alias** button. Otherwise, click **Close** to return to the **Decedent** page. Clicking the **New Alias** button will open the **Alias Name** page shown below.

    ![Alias Name page]

    Once you have entered the **New Alias** information, click on the **Save** link to save your changes. Click **Cancel** to close the page without saving changes.

    ![Alias Name page updated]

    Saving the changes above will cause the page to refresh and display the **Alias Name** summary page shown below. Click the close button to return to the **Decedent** page.
Notice that the **Aliases** tab now displays the newly added **Alias**:

![Alias Table]

12. The **Sex** dropdown list will be pre-populated based on the selection that was made on the **Search** page. The **Gender** dropdown list should be populated with the gender the decedent identifies as at the time of death.

13. Enter the decedent’s Social Security Number in the **Social Security Number** control. If decedent has no SSN then select the **None** radio button. If the decedent’s SSN is not known, select the **Unknown** radio button.

14. The **Verify SSN** link sits to the right of the **Minutes**. When this link is selected, the **DRIVE** application establishes a connection with the Social Security Administration and verifies the given SSN against information in their database. However, before the SSN can be verified, the decedent’s **Name, Social Security Number Date of Birth and Sex** must also be filled in. If None is selected the SSN will auto fill with zeros (000-00-0000) if Unknown is selected the SSN will auto fill with nines (999-99-9999). In both cases the **Verify SSN** will be disabled.

![SSN Verification]

When the **Verify SSN** link is activated, the **Decedent** page will refresh and SSN Verification Status will change from **UNVERIFIED (0)** to **PENDING (0)** message displayed. This indicates that communication has been initiated with SSA. Once the SSN has been verified, or failed verification, the page will refresh once more with an appropriate message.
15. The **Age** controls must be completed before registration can occur. In the **Age** control, enter the decedent’s age at time of death. If the decedent was **Under 1 Year** old at the time of death then leave the **Age** control empty and fill in the **Months** and **Days** controls. If decedent was **Under 1 Month** old at the time of death, then fill in the **Hours** and **Minutes** controls, instead.

16. The **Decedent’s Birth Place** tab is used to capture the decedent’s birthplace.

17. Lastly, select **Yes** or **No** from the **Ever in US Armed Forces?** dropdown list.

18. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Resident Address** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Main Menu**.
Exercise 2: Residence Address

Skills Learned: In this exercise you will learn how to complete the Resident Address page.

1. Make sure that the Resident Address page reflects the decedent’s last known address.

2. If the street address has a Pre-Directional indicator, i.e. East 42nd St. then indicate that by selecting E from the Pre-Directional dropdown list. Do NOT type the Pre-Directional indicator in the Street Name text box.

3. If the street address has a Post-Directional indicator, i.e. East 42nd St. SW, then indicate that by selecting SW from the Post-Directional dropdown list. Do NOT type the Post-Directional indicator in the Street Name text box.

4. Select a value for Inside City Limits from the dropdown list.

5. If decedent has lived at the current address for less than 2 years, enter previous address in the textbox provided.

6. Click the Validate Page button to check this page for errors, the Next button to proceed to the Family Members page, the Clear button to clear all entries, the Save button to save changes without leaving this page, or the Return button to return to the Main Menu.
Exercise 3: Family Members
Skills Learned: In this exercise you will learn how to complete the Family Members page.

1. First, make a selection from the Marital Status dropdown list.
   Above the Surviving Spouse Name field is a dropdown list entitled Marital Status. Decedent’s marital status must be entered. If status is not known, select Unknown.

2. Most of the text entry controls on this page are self-explanatory. If the Surviving Spouse Name is that of the wife then her maiden name must be used in Last name field.

   Likewise, decedent’s Mother’s Maiden Name Prior to First Marriage must also be used.

   If Surviving Spouse is female, list current legal last name of surviving spouse and Mother.

   Remember: If surviving spouse is the wife, then her Maiden name must be entered. Likewise, decedent’s mother’s maiden name must also be used.

3. Here are a few of the errors you may run across when working on the Family Members page.
DR_0855 was generated because the spouse’s maiden name is the same as the decedent’s last name. Notice that this is a soft edit failure: this error can be overridden and the record registered as is.

DR_0870 was generated because the decedent’s father’s last name was left blank. This is a hard edit failure and must be corrected before the record can be registered.

DR_0886 was generated because the decedent’s mother’s maiden name was left blank. This is a hard edit failure and must be corrected before the record can be registered.

All Last Name fields must be completed. If unknown, then type ‘Unknown’. The text entry boxes are case-sensitive, so capitalize ‘Unknown’ to avoid errors.

4. Click the Validate Page button to check this page for errors, the Next button to proceed to the Informant page, the Clear button to clear all entries, the Save button to save changes without leaving this page, or the Return button to return to the Main Menu.
**Exercise 4: Informant**

Skills Learned: In this exercise you will complete the Informant page. The Informant page is used to gather information concerning the person reporting the death.

1. Enter the informant’s name in the Informant Name fields.

2. Also on the Informant Name tab, make a selection from the Relationship to Decedent dropdown list.

3. If the appropriate relationship cannot be found in the list then select Other and fill in the correct relationship in the Other Specify text entry box.

4. Complete the Address by entering the informant’s address information.

5. Click the Validate Page button to check this page for errors, the Next button to proceed to the Disposition page, the Clear button to clear all entries, the Save button to save changes without leaving this page, or the Return button to return to the Main Menu.
Exercise 5: Disposition
Skills Learned: In this exercise you will learn how to complete the Disposition page.

1. Most of the controls on the Disposition page will be system filled and should only be changed if necessary.

2. Make a selection from the Method of Disposition dropdown list. In the example above, we have chosen Donation/Burial. If the method used does not appear on the list then select Other and enter the correct method of disposition in the Other text entry box.

3. Next, enter a valid Date of disposition, if known, using one of the valid DRIVE MM-DD-YYYY formats or the Calendar control by clicking on the Calendar icon .

4. The Place of disposition Lookup control will be filtered based on the selection made for Method of Disposition, above. For example, if method selected was burial then the lookup will include a list of cemeteries. If cremation, a list of crematories. If the Place of Disposition is not found in the list, you may manually key in the appropriate value.

5. Enter a Facility Name, if you do not know the spelling on the facility you can use the % sign as a wildcard. Click the Search button to return the search results. Since the first place of disposition is a donation facility the search results will bring back the list of valid donation facilities.
6. Click the Select link to fill in the Place of Disposition:

7. If the current user is a Funeral Director, then the funeral director control will be system filled with the user’s profile information. If it is necessary to change the funeral director information, as would be the case when one funeral director is keying a case on behalf of another, then click on the Funeral Director tab’s Lookup ( ) control to bring up a list of directors to choose from.
8. Click the **Select** link to fill in the Funeral Director:

![Select link](image)

8. When logged in as a Funeral Home user, the **Funeral Home** tab is auto-populated with the office selected at login, and disabled.

![Funeral Home tab](image)

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9. Enter the **Burial Permit Number**.

10. If known, the **Local Health Department** and **Local Approved By**. Otherwise, leave blank. **These fields are auto-populated based on place of death and the individual who approves the record for filing. These fields should only be modified on rare occasions.**

11. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Decedent Attributes** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Main Menu**.
Exercise 6: Decedent Attributes

Skills Learned: In this exercise you will learn how to complete the Decedent Attribute page. All information entered on this page should be relative to the decedent.

1. In the two text-entry boxes at the top of the page, enter the Decedent’s Usual Occupation and Decedent’s Kind of Business/Industry. Next, enter the Decedent’s education level in the number box provided.

   Use these textboxes to enter the decedent’s occupation and industry.

   Select Decedent’s education level from this dropdown list.

2. Make a selection from the Hispanic Origin Check boxes. If you select Yes, other Spanish/Hispanic/Latino, then manually enter the appropriate ancestry in the Other Specify control. If you select an invalid combination such as No, Not Spanish/Hispanic/Latino and one of the Yes, values an edit will inform you when validating the record.

3. Make a selection from the Race tab. You can select any number of checkboxes.
4. If you select Other Asian (specify), Other Pacific Islander (specify), or Other (specify), then the Race tab will expand and display a text entry control that must be also completed. If you select American Indian or Alaska Native a drop down will enable and you must specify the tribe.

5. Click the Validate Page button to check this page for errors, the Next button to proceed to the Affirmation page, the Clear button to clear all entries, the Save button to save changes without leaving this page, or the Return button to return to the Main Menu.
Exercise 7: Sign-Affirm

Skills Learned: In this exercise you will learn how to Affirm a Death Record.

An affirmation is used to record the fact that the medical certifier is accepting legal responsibility for the accuracy of the information provided. In many jurisdictions these are legally binding statements made under the penalty of perjury.

1. Select the Sign page in the Personal Information Menu.

2. Place a checkmark in the Affirm the following: checkbox and click the Affirm button.

Once the Affirm link is selected the Authentication Successful message will be displayed.

3. Clicking the Affirm button will cause the page to refresh and let you know that the Authentication was successful.

4. Click the Return button to return to the Decedent page of the Death Registration Menu.
Exercise 8: Locate Case

Skills Learned: In this exercise you will learn how to locate cases in the DRIVE system. Please note that, when searching for existing cases, only those records “owned” by the user or facility currently using the application will be returned.

The Locate Case page is used by data providers such as funeral directors, physicians and medical examiners to locate registered and unregistered cases ‘owned’ by the office to which the current user is associated. These cases can be opened for review or editing purposes for a jurisdictionally defined period of time even after they have been formally registered.

1. From the DRIVE Main Menu, select Life Events -> Death -> Locate Case:

You can also get to it from the Fast Links Page.

2. Locate Case offers many different identifiers on which to base a search. While there is no minimum requirement on the number of identifiers to use, it is recommended that as much information be included as possible. This will help to narrow your search results.

3. In the example below, we are searching only on Last name. Enter the decedent’s last name and click the Search button.
4. Searching on **Last** name only returns the following results:

<table>
<thead>
<tr>
<th>Case Id</th>
<th>Decedent's Name</th>
<th>Date of Death</th>
<th>Sex</th>
<th>Place of Death</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>535</td>
<td>Test, April</td>
<td>MAR-13-2017</td>
<td>Female</td>
<td>Maricopa</td>
<td>MAY-15-1945</td>
</tr>
<tr>
<td>257</td>
<td>Test III, June T</td>
<td>JAN-09-2017</td>
<td>Male</td>
<td>Maricopa</td>
<td>APR-02-1937</td>
</tr>
<tr>
<td>537</td>
<td>Test, May</td>
<td>MAR-13-2017</td>
<td>Female</td>
<td>Pima</td>
<td>MAY-15-1945</td>
</tr>
<tr>
<td>376</td>
<td>Test, New</td>
<td>JAN-20-2017</td>
<td>Female</td>
<td>Maricopa</td>
<td>JAN-20-2001</td>
</tr>
<tr>
<td>340</td>
<td>Test, One</td>
<td>JAN-19-2017</td>
<td>Male</td>
<td>Maricopa</td>
<td>APR-04-1930</td>
</tr>
<tr>
<td>206</td>
<td>Test, Ow</td>
<td>JAN-09-2017</td>
<td>Male</td>
<td>Maricopa</td>
<td>MAY-15-1941</td>
</tr>
<tr>
<td>508</td>
<td>Test, Pages</td>
<td>MAR-01-2017</td>
<td>Male</td>
<td>Maricopa</td>
<td>MAY-15-1945</td>
</tr>
<tr>
<td>512</td>
<td>Test, Request</td>
<td>MAR-01-2017</td>
<td>Male</td>
<td>Maricopa</td>
<td>MAY-15-1945</td>
</tr>
<tr>
<td>6602</td>
<td>Test, Sandra</td>
<td>JUN-09-2017</td>
<td>Male</td>
<td>Maricopa</td>
<td>APR-28-1923</td>
</tr>
<tr>
<td>6600</td>
<td>Test, Sandra n</td>
<td>JUN-09-2017</td>
<td>Female</td>
<td>Maricopa</td>
<td>APR-28-1923</td>
</tr>
</tbody>
</table>

**Total Records: 19**

5. Click the **New Search** button in the lower, right-hand corner of the **Results** window.

6. For this search, enter both the decedent’s **First** and **Last** name and then click the **Search** button.

7. Notice that this search greatly reduced the number of records returned making it easier to locate the exact record needed.
8. The **Results** page is used to retrieve records that have been started and need to be reviewed/edited. However, in the example above, there were three (3) potential matching records. Locate and click the **Preview** link in the far right column of the **Results** window. The example below shows what happens when you click this link. Clicking on this link will open a preview pane that provides a brief summary of the record.

![Preview](image)

9. If, after examining the preview pane, you are confident that you have located the desired record, then click on the decedent name link in the **Decedent’s Name** column to open the record for review and/or editing.

![Decedent's Name](image)

10. With the record open, it can now be reviewed and/or edited.

11. Another feature of the **Locate Case** page is the **Soundex** button. Using **Soundex** you can locate records even when you are unsure of the spelling of the decedent’s name.

![Soundex](image)

**Remember, only those records “owned” by the current user’s facility will be returned.**
Exercise 1: Print Forms

Skills Learned: In this exercise you will learn how to send working copies of a completed death certificate to an installed printer.

Note: The ability to print Work Copies is based on user security privileges. Typically, Physicians, Medical Personnel, Funeral Directors, and Medical Examiners will be printing Work Copies.

1. Under the Other Links Menu select Print Forms.

2. Locate the Print Form you want to print.

3. Clicking on any form link will open the File Download dialog box and launch the document for printing.

Select “Open” to display and print the document.
Exercise 2: Request Medical Certification

The Request Medical Certification page is used when the Funeral Home director has finished inputting their data and is ready to hand the case off to a physician for certification. A medical facility clerk may also use the Request Medical Certification feature to notify a physician that a case is ready for review.

1. From the Main Menu, select Death Registration Menu -> Other Links -> Request Medical Certification.

2. This will display the Request Medical Certification page as shown below:

3. Notice, that the Message text entry box shown above is pre-filled with a formatted message requesting medical certification. This message can be left as is, edited or deleted and replaced entirely.
4. Next, select a certifier to assign the case to by clicking on the **Certifier Name Selector Button**.

5. From the **Search Certifiers** enter the last name of the certifier and click the **search** button. If you don’t know the spelling of the Certifier you can put in a % sign as a wildcard. Select a Certifier from the list by clicking on the corresponding **select** link. This will close the **Search Certifiers** dialog and insert the certifier name into the **Name** text entry box.

6. Next, select a Facility to assign the case to by clicking on the **Facility/Office Name Selector Button**.

7. From the **Lookup Medical Facilities** enter the name of the facility and click the **search** button. If you don't know which facilities this certifier is associated to you can put in a % sign as a wildcard. Select a Facility from the list by clicking on the corresponding **select** link. This will close the **Lookup Medical Facilities** dialog and insert the Facility name into the **Facility** text entry box.
8. Select **Clear** to clear all entries and begin again, **Save** to save your changes and request certification or **Return** to leave this page without saving your changes and return to the previous page.
Exercise 3: Relinquish Case

Skills Learned: Once a Physician, Medical Examiner or Funeral Home Director has taken "ownership" of a record no other similar user will be allowed "write access" to the record. That is, only the medical facility, physician’s office, medical examiner office, or funeral home director that “owns” the record can make changes to the record.

The Relinquish Case link allows a user to relinquish control of the record so that a different user can login and make changes.

1. From the Death Registration Menu select Other Links, Relinquish Case.

2. From the Relinquish Case –Web Page Dialog, select OK to relinquish control or Cancel to retain ownership of the record.
Exercise 4: Transfer Case

Skills Learned: From time to time, it may be necessary for a facility such as a Funeral Home or Hospital to transfer ownership of a case to another, similar facility. For example, if the decedent had multiple survivors and burial arrangements were made at multiple sites, one of those sites might have to transfer ownership of the case to the one, appropriate site.

In this case, the transferring home would use the Transfer Case page to relinquish ownership to the firm responsible for interment.

1. From the Death Registration Menu, select Other Links -> Transfer Case.

Notice, that on the Transfer Case page there are two options: Transfer Personal Ownership and Transfer Medical Ownership.

The Transfer Case page, shown below, can be used by both Funeral Home personnel and Medical Facility personnel.

In either case, only one option will be available. In the example below, Transfer Personal Ownership is available because the user was signed in as a Funeral Director.

Medical Facility staff would not be able to transfer Personal Ownership, but would be able to transfer Medical Ownership.

There are two types of ownership: Personal, which is controlled at the Funeral Home, and Medical, which is controlled by the governing medical facility. Each option’s availability is dynamically controlled based on user security profile.
2. To **Transfer Personal Ownership**, place a checkmark in the **Transfer Personal Ownership To:** check box.

3. From the **Lookup Office to transfer personal ownership to** enter the name of the office and click the **search** button. If you don’t know how to spell the office you can put in a % sign as a wildcard. Select an office from the list by clicking on the corresponding **select** link. This will close the **Lookup Office to transfer personal ownership to** dialog and insert the Office name into the **Office** text entry box.
4. Finally, select **Clear** to clear all entries and begin again, **Save** to save your changes and transfer ownership of the record, or **Return** to leave this page without saving your changes and return to the previous page.

Note: the Message box is pre-filled and can be left as is, edited, or deleted and replaced entirely.
Exercise 5: Amendments

Skills Learned: In this exercise you will learn how to submit an amendment request.

From time to time, it may be necessary to make changes to a registered death record. These changes are called amendments.

1. To access the Amendments link, select Other Links -> Amendments.

Note: Access to the Amendments link is restricted based on user security privileges. You may not be able to access this page.

2. Notice, when the Amendments link is selected, the Amendments Menu is added above the Death Registration Menu.

3. The first step in processing an amendment is to make a selection from the amendment Type dropdown list on the Amendment Page:

An Amendment Type must be selected.

4. Add a description of the amendment in the Description text entry control and click Save.
5. The page will refresh and display the new **Page to Amend** control.

6. Make a selection from the **Page to Amend** dropdown list.

7. The application will refresh and display the selected page.
8. Make any necessary changes and select the Save button. The Item In Error / Item As It Should Appear grid control will be displayed showing both the original value and the new value of the field(s) being amended. Note that if there was no original value then the “Item In Error” column will be blank.

9. From the Amendments Menu, select Amendment Affirmation.

10. Place a checkmark next to the Affirmation statement and select the Affirm button.
11. The page will refresh and display an Authentication successful message.

12. From the Amendments Menu, select the Amendment link. Note that the Amendment Status is now set to “Pending.”
Exercise 6: Refer To Coroner

Access to the Refer to Coroner page is dependent upon user’s security privileges. Typically, funeral directors and coroners have access to this page. You may not have access to this page.

The Refer to Coroner page is to notify a coroner of a death that was due or may have been due to unnatural causes.

1. From the Death Registration Menu, select Other Links, Refer to Coroner.

2. County should autofill based on place of death. If not, select “County” lookup control.

3. A list of all counties will display. Select county of jurisdiction relative to current case.
4. The page will refresh and display the county selected. Select the Office lookup (magnifying lens) control.

5. Enter the facility of jurisdiction in the **Facility Name** control and select the **Search** button. Note that this field is compatible with Wild Card searches.

6. Select the office of jurisdiction from the search results list. The page will refresh and display the office selected.

7. If Coroner is known, select the Coroner name using the lookup icon.

8. Enter the Coroner’s Last Name and select the **Search** button. Note that this field is compatible with Wild Card searches.

Note that the Message field is pre-filled as shown below. This message can be used as presented, edited as needed, or deleted and replaced in its entirety. Select the **Save** button to complete the referral process. The next time the Medical Examiner logs in, this case will appear in their work queue.
Exercise 7: Request Non Affiliated Medical Certification

For a medical facility, a patient may pass in the facility but the attending physician, will not be certifying the death. In those cases, the facility will start the case but the Local Health Officer will complete the medical certification portion of the death record. The Request Non Affiliated Certification link allows a user to request the Local Health Officer certify a record.

1. From the Death Registration Menu select Other Links, Request Non Affiliated Certification. The Request Non Affiliated Certification –Web Page Dialog will be displayed.

2. This will display the Request Non Affiliated Certification page as shown below:

3. Assign the case to a Facility by clicking Office Name Selector Button.

4. From Lookup Facilities enter the facility name and click search. If you don’t know which facilities the certifier is associated to you can put in a % sign. Select from the list by clicking select. Lookup Facilities will close and insert the name into the Facility text box.
5. Next, assign a certifier by clicking on the Certifier Name Selector Button ( ).

6. From the Search Certifiers enter the last name of the certifier and click the search button. If you don’t know the spelling of the Certifier you can put in a % sign as a wildcard. Select a Certifier from the list by clicking on the corresponding select link. This will close the Search Certifiers dialog and insert the certifier name into the Name text entry box.

7. The selected office and certifier are selected. Edit the prefilled message text box to include any information needed by the certifier.

8. Select Clear to clear all entries and begin again, Save to save your changes and request certification or Return to leave this page without saving your changes and return to the previous page.
Work Queues

Skills Learned: In this exercise you will learn how to navigate through the various work queues in the system. For this exercise we will be working from the Main Menu, not the Death Registration Menu. From the Main Menu, select Queues. Queues contain registrations, orders, or amendments having a work queue status. Queues are used to group death cases together based on the amount of work that has been done with them and the amount of work that still needs to be done. This is done primarily through the assignment of a work queue status when a validation rule fails.

Exercise 1: Work Queues - Summary
1. From the Main Menu, select Queues, Work Queue Summary. This will bring up a listing of all the available work queues containing cases. If a queue does not contain any cases it will not be displayed in the list. Additionally, if a user does not have security access to a specific queue it will not appear in the list.

The default sort order is by Queue Name. However, the column headers summary tables are all underlined links. Clicking on any of these links will re-order the table based on that columns content.

Click any of the column headers to re-sort the Work Queue Summary.

2. Count indicates how many cases are in the queue. Age of Oldest in Days indicates the age of the oldest case in the queue.

3. Click on any Queue Name to view a list of the death cases currently in that queue. In the example shown here there are thirty-four (34) cases in the Personal Pending – Death queue.
4. Click on any Registrant name link to access that case for review or editing.
**Exercise 2: Work Queues - Search**

**Skills Learned:** Learn how to search for cases based on their queue status.

1. From the **Main Menu** select **Queues -> Registration Work Queues.** This will open the **Search by Work Queue** window.

   **NOTE:** The work queues presented will vary based on user type and user security setup. Also, a work queue will not be displayed if there are no cases in the queue.

   ![Search by Registration Work Queue](image)

2. Select one of the available options from the **Queue**, or **Search Type** dropdown list or enter a value to search for in the **Value** text-entry box.

   ![Search by Registration Work Queue](image)

3. To narrow your search you may use a combination of search parameters. However, you must always make a selection from the **Queue** dropdown list. In the example below, we searched using **Queue**, **Search Type** = Case Number and **Value** (Case ID) = 4439

   ![Search by Registration Work Queue](image)

   **You must enter at least one of the above search parameters, but can also use any combination of the three.**

4. Click the **Search** button to execute the search or the **Clear** button to clear your search parameters and start over.

   ![Search by Registration Work Queue](image)
Appendices

Appendix 1 - Glossary of Icons and Controls

There are several different types of icons and controls used in DRIVE. Many are industry-standard or universal controls you may already be familiar with from using other programs and/or websites. Others, are DRIVE specific controls that you will not find anywhere else.

- **Auto-populate Button**: Automatically populates information in one field based on data entered in another. For example, based on data entered in the Date of Birth field, selecting the Auto-populate button calculates the age and populates the Age field.

- **Calendar Icon**: Launches the interactive Calendar and is placed next to date entry fields. The Interactive Calendar is an alternative to manually entering the date.

  1. Launch the calendar by selecting the Calendar Icon next to the date entry field:

  ![Calendar Icon Example]

  2. Select a Month and Year from the dropdown menus.

  ![Calendar Dropdown Menus]

  3. Select the specific day. Once the day is chosen, the calendar will close and enter the date into the date field.

  ![Selected Date Example]

  **Note**: Selecting the calendar’s Today link enters the current date in the date field. Pressing the F12 button on your keyboard does this as well.

- **Checkboxes**: Checkboxes allow users to make one or more selections from a variety available options. To select or de-select a checkbox, simply click inside the box.

  ![Checkbox Example]
Note: If a Checkbox or Radio Button has focus:
- Use the Spacebar to “press” and select the button, or
- Use the Enter key to “press” and select the button.

**Buttons** initiate various functions within the application. They are used to navigate the application, accept data input, write information to the database, and trigger the processing of underlying system code.

**Fix Icon**: Appears in the DRIVE Validation frame only. Selecting this icon will place the focus or cursor in the item containing invalid information.

**Label Control**: Identifies a nearby text box or other control. Indicates what type of information is expected in that control.

**More Icon**: A DRIVE™ specific element that returns more information than what is currently displayed.

**LOV Icon**: A search tool used in the DRIVE application.

**LOV Eraser Icon**: Removes values selected using the LOV search tool.

**Place Search Icon**: Launches a popup that facilitates the entry of city, state, county and/or country.

**Radio Buttons**: Allows the user to choose only one of a predefined set of options.

**Required Controls**: All controls accompanied by small red arrows are mandatory and must be completed or attempts to save the page will cause a pop up error message to appear. The data must be completed before the user can continue.

**Show Tooltips Checkbox**: The Show Tooltips checkbox under the Help menu controls whether ‘hint’ text is displayed when hovering over an icon or control.

**Text Box Control**: Allows user to enter information that will be used by the program. Can be formatted to accept only text, a combination of text and numbers, numbers only, or dates.

**Table Paging**: When a table of data contains more rows than can be displayed on a single page, DRIVE provides a set of controls located at the bottom of the search results page that displays the page currently selected, the total number of pages of search results, and links to the other search result pages.
The number of the selected page appears as bold text. The **First** and **Last** links allow users to easily jump to the beginning or ending of the search results. In addition to providing links to quickly access the **First** page, pages 1 – 10, and the **Last** page of the search results, the total amount of pages available for selection can be easily revealed by selecting the ellipsis link ( ... ).

If the number of records returned is greater than the system preference for the maximum records allowed, **DRIVE** will display a warning message encouraging the user to refine search criteria. The message below was displayed on the search results page when a user attempted to search for all death records within a 2 year time span.

Not all pages will require table paging. In some cases it will be more useful to show a very large result set and use scroll bars to see the records that extend below the browser window.

- **Validation Checkmark-Green**: this is a display only icon. Clicking on it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DRIVE** information page contains valid information.

- **Validation X Symbol-Red**: this is a display only icon. Clicking on it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DRIVE** information page contains invalid information that must be corrected before certification will be allowed.

- **Validation Caution Symbol-Yellow**: this is a display only icon. Clicking on it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DRIVE** information page contains information that may be invalid and must be corrected or overridden before certification will be allowed.
Appendices

Appendix 2 - Usage and Common Conventions

This appendix consists of useful tips and tricks to help you become a more efficient user of the DRIVE application. These hints will actually help you with almost any Windows based application.

1. **Focus** – Focus determines which control on the page will receive the action. For example, if an empty text box has the focus then a flashing cursor will appear in the far left hand side of the box. Anything you type will appear in the text box.

   ![Text Box Example](image)

   If a Dropdown menu has focus it will be highlighted in blue. Once the dropdown is opened, a user can choose from a list of values.

   ![Dropdown Menu Example](image)

   A Checkbox or Radio Button will be surrounded by a dotted line when it receives focus. The box can then be selected by the user by pressing the keyboard space bar.

   ![Checkbox Example](image)

   **Passing the Focus:** Moving between these controls is a matter of passing the focus. This is accomplished by using the following keyboard shortcuts:

   - The Tab key advances the focus forward
   - Alt+Tab (holding down the Alt key while pressing Tab) passes the focus back to the previous control.

   Every page is structured a little differently. Exactly where Tab and Alt+Tab send the focus will vary, but it should always advance logically from one control to the next.

2. **Keyboard Shortcuts** – Now that you understand what Focus is and how to pass it from one control to the next, let’s see how you can use it to become a more efficient DRIVE user.

   If a Text Entry Box has the Focus, then just start typing to fill in the box. **Note:** If the text entry box already contains text, then when it receives the focus that text will be highlighted. Anything typed while the text is highlighted will replace the old text.

   If a Checkbox or Radio Button has the Focus, then pressing the spacebar will check or uncheck the control.
If a **Dropdown List** receives the **Focus** then you have several options:
- Use the mouse to click on the down-arrow to reveal the list of selectable options. However, try to avoid using the mouse.
- If you know the first letter of the option you want to select then just type that letter. The focus will then shift down to the first option in the list beginning with that letter. If there are multiple selections beginning with that letter then keep typing it until your desired option shows up. Then, **Tab** off of the list to save that selection.
- Use the **Up** and **Down Arrows** on your keyboard to scroll through the list of options. When the correct option is highlighted, use the **Tab** key to save that selection and move to the next control.
- Hold down the **Alt** key and press the **Down-Arrow** button on your keyboard to reveal the list. Then, using either your mouse or the **Up** and **Down Arrows**, make your selection and **Tab** off to the next control or hit the **Enter** button.

If a **Click Button** receives the focus you have two options:
- Use the **Spacebar** to “press” the button, or
- Use the **Enter** key to “press” the button

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**Did You Know?**

*Using Alt-Left Arrow is the same as using your web browser’s ‘Back’ button.*

*Using Alt Right Arrow will trigger your browser’s ‘Forward’ button.*

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3. **Standard Date Formats:**

**DRIVE™** uses a standard date format but is flexible enough to recognize and convert other formats users may enter. Formats accepted for conversion are illustrated below:

<table>
<thead>
<tr>
<th>Input Formats</th>
<th>Typed As</th>
<th>System Converts to</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM-DD-YYYY</td>
<td>02-05-2014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>02/05/2014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>MMDDYYYY</td>
<td>02052014</td>
<td>Feb-05-2014</td>
</tr>
<tr>
<td>MonDDYYYY</td>
<td>Feb052014</td>
<td>Feb-05-2014</td>
</tr>
</tbody>
</table>
**Did You Know?**

1. Selecting F12 will automatically key today’s date into the selected date field.
2. Entry of dates in any other date format will result in an error.

4. **Zip Code Auto-Populate Address** - Zip code based auto-population controls are built into the **DRIVE** application to assist users in entering address data accurately and efficiently.

The **Zip Code** field appears as the first entry amongst the address location fields of: **City or Town**, **County**, **State** and **Country**.

Upon entry of the **Zip Code**, the **City or Town**, **County**, **State** and **Country** fields will auto-populate.

If the **Zip Code** entered has multiple **City or Town** or **County** associated options, the system will display a list of valid values to choose from.

**Did You Know?**

The **Zip Code** auto complete feature is optional and can be turned off in **DRIVE** through System Preferences.