Medical Facility/Coroner Training Exercises

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Logging Into the DRIVE Application

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/](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.

3. 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.

4. 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.

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.

If more than one word in the list starts with the same letter, typing that letter again will scroll through the list for you. For example, typing ‘U’ in this example would display ‘Undetermined’. Typing it again will display ‘Unknown’.
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-YYYYY</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.

![Lookup Place of Death Facility](image)

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”.

![Lookup Place of Death Facility](image)

4. Select a facility. Notice all controls on **Place of Death** are now auto-filled.

![Place Of Death](image)
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.

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.

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.

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.

6. Another method of correcting mistakes is to click on the **Fix** button in the **Popup** column…
...to launch a popup window containing the error to be corrected:

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 these exercises you will learn how to use the Medical Certification pages of the DRIVE application to process and certify 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 only be allowed to create a new record by selecting the Start New Case button or begin a new search by selecting the New Search button.

5. If you select the Start New Case button, a new case will be started and the Decedent page will be displayed.

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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.
6. If a matching event was found, as would be the case when a medical certifier completes a record started by a funeral director, then select the underlined link in the Decedent's Name column.

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. Once either the Start New Case or the Decedent’s Name Link are selected the Death Registration Menu and Decedent page will be displayed. You can now begin the process of creating or completing a death registration.

Notice also, that not all information displayed on the Decedent page can be changed by Medical Facility users. Items that are grayed out can only be completed when the “Will Coroner be responsible for final disposition?” question is Yes.

Items in gray cannot be changed by Medical Facility users.

However, both Sex and Gender fields appear on the Decedent page and can be modified by the medical certifier.
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. This is how the coroner will complete an entire death record, both personal and medical portions.
Exercise 2: Pronouncement

Skills Learned: In this exercise you will learn how to complete the Pronouncement page. The Pronouncement and Place of Death pages can be completed by either the funeral home or medical certifier, but the medical certifier is certifying the accuracy of the two pages.

Under Medical Certification on the Death Registration Menu the Medical Facility user will need to fill out the Pronouncement page:

1. Make a selection from the Date of Death Modifier dropdown list. If the actual date of death is known, select Actual. If the date of death is questionable, then select Estimated. If it is known when the body was found but a date cannot be determined, then select Found.

2. In the Date of Death calendar control enter the date on which death occurred. This is a mandatory field and must be completed for all death registrations, even when actual date of death is not known. This field is required to start a new death record on DRIVE and will most often already be completed based on the information entered to start the case.

3. Make a valid selection from the Time of Death Modifier control.

4. In the Time of Death control enter the time death occurred. Be sure to make a valid selection from the AM/PM dropdown list.

5. Click the Validate Page button to check this page for errors, the Next button to proceed to the Place of Death 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: Place of Death

Skills Learned: In this exercise you will learn how to complete the Place of Death page.

1. From the Type of Place of Death dropdown list, select the type of place that best matches the location where death occurred.

2. The Facility Name and Address are system filled with the facility information the Medical Certifier has logged in under. Depending on the Type of Place of Death selected this information can be updated.

If the Type of Place of Death selected is Dead on Arrival, Emergency, or Inpatient then the Facility Name and Address will remain system filled and disabled.
If **Decedent’s Residence** is selected from the **Type of place of death** dropdown, the **Address** fields for **Place of Death** will be auto-populated with the information entered on the **Resident Address** page. If no information has been entered on the **Resident Address** page, the residence address can be manually entered. The **Facility Name** field is not required and will be disabled.

If **Other (specify)** is selected from the **Type of place of death** dropdown, the facility name (if known or applicable), and **Address** fields should be manually entered. The **Facility Name** field can be left blank.

For all other **Type of Place of Death** dropdown selections, the **Place of Death** can be entered manually or the LOV Lookup icon can be used to launch the **Lookup Place of Death** search tool.

3. Use the **Lookup** control to search for and select the actual facility where death occurred. The Lookup Place of Death Facility pop-up search box is displayed.
Enter search criteria into the facility name field. A wildcard (%) can be used to search in this field. From the search results list, click the Select link to add the Place of Death facility.

4. Click the Validate Page button to check this page for errors, the Next button to proceed to the Cause of Death 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: Cause of Death

Skills Learned: In this exercise you will learn how to complete the Cause of Death page.

1. The Cause of Death page is somewhat unique in that it consists primarily of text boxes. Using the text boxes enter the cause(s) of death, the interval onset to death and any other contributing factors.

![Cause of Death Page Example](image)

2. For help in completing this page, click on the NCHS Recommendations for Entry of Cause of Death link. A dialog will open (shown below) with instructions for completing the Cause of Death page.
3. The **Cause of Death** page consists of two parts:

**Part 1** is for reporting the chain of events leading directly to death. The Immediate Cause, (the final disease, injury, or complication directly causing death), is listed on line a. The underlying cause(s), (chain of events that led to the immediate cause), is listed in lines b through d.
Approximate Interval Onset to Death: To the right of each of the lines Part 1 there is a corresponding Approximate Interval Onset to Death field. For each cause listed in Lines a-d an Approximate Interval Onset to Death must also be completed. While every line on the Cause of Death form will not necessarily be used for all deaths, lines that are used must be filled in sequentially.

Part 2 is for reporting all other significant diseases, conditions, or injuries that contributed to death.

Spell Check functionality is available for Cause of Death lines a-d and the Other significant conditions field.

1. After making an entry, select the Spell Check icon located below the line.

2. DRIVE will check all phrases entered and highlight any misspelled entries.

3. Select the highlighted word. A list of possible corrections is displayed. Select an option from the list to replace the misspelled word.
4. Upon correction of all misspelled entries in a line, the Spell Check icon will be replaced with a Corrected icon.

5. Alternately, all lines can be spelled checked simultaneously by selecting the Check Spelling button located at the bottom of the Cause of Death page.

DRIVE will check all phrases entered on all lines and highlight any misspelled entries. You can then select the phrases and use the same control as in step 3 above to view and select suggested properly spelled words.

6. Click the Validate Page button to check this page for errors, the Next button to proceed to the Other Factors 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: Other Factors

Skills Learned: In this exercise you will learn how to complete the Other Factors page.

1. The Other Factors page contains any other information relevant to the death: Autopsy Performed, Tobacco Use, etc.

2. From the Autopsy Performed dropdown list select either Yes or No, accordingly. If Yes is selected from Autopsy Performed, then make a selection from the Autopsy findings available to complete cause of death dropdown list, also.

3. If decedent is female, make a selection from the If Female, specify pregnancy status dropdown list. If male or undetermined, the field will be greyed out and system filled with Not Applicable.
4. Finish the page by making selections from the remaining dropdown lists. Include the **Coroner Case Number** if **Was case referred to Coroner** was answered **Yes**.

5. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Injury** page (only for coroners who have stated the manner of death as anything other than natural), 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: Injury

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

1. The Injury page, shown below, will only be completed if the manner of death, selected on the Other Factors page, was anything other than Natural.

2. Place date fatal injury occurred in the Date of Injury control, without respect to actual date of death. Select the appropriate Date of Injury Modifier.

3. Place time fatal injury occurred in the Time of Injury control, without respect to actual time of death. Select the appropriate Time of Injury Modifier.

4. If injury occurred on the job, select Yes from the Injury at Work dropdown list.

5. Make a selection from Place of Injury dropdown list.

6. In the Place of Injury Description text box, manually type in the actual location where injury occurred.

7. Complete the Injury Location tab by providing the address at which fatal injury occurred.

All non-natural manners of death should be completed and reported ONLY by the Coroner. The Medical Certifier is not given access to select any other Manner of Death except Natural and therefore will not complete the Injury page.

For Coroner:

2. Place date fatal injury occurred in the Date of Injury control, without respect to actual date of death. Select the appropriate Date of Injury Modifier.

3. Place time fatal injury occurred in the Time of Injury control, without respect to actual time of death. Select the appropriate Time of Injury Modifier.

4. If injury occurred on the job, select Yes from the Injury at Work dropdown list.

5. Make a selection from Place of Injury dropdown list.

6. In the Place of Injury Description text box, manually type in the actual location where injury occurred.

7. Complete the Injury Location tab by providing the address at which fatal injury occurred.
8. Provide the circumstance surrounding the injury in the **Describe how injury occurred** text box control.

9. Make a valid selection from the **Injury Activity** dropdown list by selecting the option that best describes the injury incurred.

10. If fatal injury was the result of a transportation mishap, then make a selection from the **If Transportation Accident, specify** dropdown list. If **Other** is selected from the list, then complete the **Other Specify** text box control. If injury is not transportation related then leave both of these controls blank.

11. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Certifier** 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: Certifier

Skills Learned: In this exercise you will learn how to complete information relative to the person certifying the death.

1. The Certifier page, shown below, is used to gather information on the person legally responsible for providing the decedent’s cause of death.

If the current user is a medical certifier, then the Certifier controls will be system filled with the user’s information. If it is necessary to change the certifier information, as would be the case when one certifier was keying the case on behalf of another, then select the Lookup icon and select the appropriate certifier. If the user is not a medical certifier then the Certifier controls will be blank upon initial display of the certifier page.

2. Make a selection from the Certifier Type dropdown list. Certifier Type represents the role the certifier played in completing the case.

3. To update or add a certifier, select the Lookup icon next to Certifier Name. The Lookup Certifier popup will be displayed.
Enter the Certifier’s last name and select search. A wildcard (%) can be used to search in this control.

4. Click the **Select** link to auto-populate **Certifier Name** and **Certifier Address** tab controls.
5. The **Certifier Address** is system filled with a medical facility address or the office address from the physician table. Sometimes it may be necessary to change this address, as would be the case when a physician works from multiple offices. To change the **Certifier Address**, select the **Edit Certifier Address** checkbox. The address will be cleared and the controls enabled to allow new address entry.

![Certifier Address](image)

6. The **Date Signed** control will be system filled upon successful **Affirmation** by the certifier.

7. Click the **Validate Page** button to check this page for errors, 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**.

**Note:** If the case does not have a status of Medical Valid or Medical Valid with Exceptions (all page indicators are green or yellow), you will not be able to advance to the affirmation page.
Exercise 8: Certify-Affirm

Skills Learned: In this exercise you will learn how Certify-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 Certify page in the Medical Certification Menu.

2. To Certify-Affirm a death record, the first authentication of the certifier must take place. Select the Send Code link and a code will be sent to the email address shown. This email address is the email address associated with the user’s DRIVE profile.

3. Enter the code received in the text box displayed and select the Verify Code button. If the code needs to be sent again, select the Re-send Code link.

4. 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.
5. Click the **Return** button to return to the **Decedent** page of the **Death Registration Menu**.

**Affirmations**

- I certify that death occurred at the time, date and place indicated.

**2. Select the Checkbox Next to the Affirmation**

**3. Select Affirm**

Authentication successful.
Exercise 9: 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 facility associated with the user 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 and logged in under. They can be opened for review or editing purposes for a defined period of time even after they have been formally registered.

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

2. The Locate Case page 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 as ‘Test’ and selecting the Search button.

4. Searching on Last name only returns the following results:
5. The **Death Search Results** page is used to retrieve records that have been started and need to be reviewed/edited. However, in the example above, there are 3 potential matching records. Locate and click the **Preview** link in the far right column of the **Results** window. Clicking on this link will open a preview pane that provides a brief summary of the record.

6. 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.

7. With the record open, it can now be reviewed and/or edited.
8. 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. In the example below, we have misspelled “Sandra Test” as “Sawndraw Testt”. However, clicking the Soundex button instead of the Search button…

Which produces the exact same search results as if we would have searched for Sandra Test.

Remember, only those records “owned” by the current user’s facility will be returned.
Other Links

Exercise 1: Print Forms - Working Copy

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 allowed to print Working Copies.

1. Select Death Registration Menu -> Other Links -> Print Forms.

2. Select the Working Copy for printing. Depending on which browser you are accessing DRIVE within you will get different options for opening and printing the working copy.

   Internet Explorer - Displays the following message:

   ![Open link in Internet Explorer](image)

   Select the Open link and the PDF of the Working Copy will be displayed.

   Google Chrome - Displays a downloaded document link in the lower left corner of the browser.

   ![Download link in Google Chrome](image)

   Select the download link and the PDF of the Working Copy will be displayed.
Exercise 2: Relinquish Case

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. The Relinquish Case –Web Page Dialog will be displayed.

2. From the Relinquish Case –Web Page Dialog, select OK to relinquish control or Cancel to retain ownership of the record.
Exercise 3: Transfer Case

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.

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

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

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

Since we are logged in as a Medical Certifier we will transfer Medical Ownership in the example below.
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.

5. To **Transfer Medical Ownership**, place a checkmark in the **Transfer Medical Ownership To:** check box.

6. Next, select the **Lookup Icon** to display the **Lookup office to transfer medical ownership to** popup search tool.

7. Enter a facility name in the facility name search field and then select the **Search** button. Wildcards (%) may be used to search in this field.
8. From the search results list, click on the Select link next to the facility the Medical Ownership should be transferred to.

9. 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 4: 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.
**Exercise 5: Refer to Coroner**

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 6: Amendments
Skills Learned: In this exercise you will learn how to submit Amendment requests.

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 or may not be able to access this page.

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

3. The first step in processing an amendment is to select an amendment Type from the dropdown list. The options available are dependent upon User Security Setup. In this example, because we are logged in as a Medical Certifier we will see only the options for amendment types assigned to the Medical Certifier role.
4. Add a description of the amendment in the **Description** text control and click **Save**.

5. The page will refresh and the **Amendment Date** calendar control will automatically fill in with the current system date. In addition, new controls appear onscreen. These controls consist of an **Amendment Status** control and a **Page to Amend** dropdown.

6. Next select the **Page to Amend** dropdown and select a registration page from the list; this page will then be displayed, with all items completed as they currently are registered. The list of pages available to amend will be dependent upon user security setup. In this case we are logged in as a Medical Certifier so we only see pages the Medical Certifier is responsible for available to select from.
7. Make changes to the item you wish to amend on the page and then select **Clear** to clear all entries and begin again, **Save** to save and display your changes in a data grid, or **Return** to leave this page without saving your changes and return to the previous page.

You can also select **Cancel Amendment** to cancel the amendment process, select **Validate Page** to check for any data entry errors the update may cause on that page, or select **Validate Amendment** to check for any data entry errors the update to the item may cause.

8. Upon **Save**, the **Item in Error** data grid will display. This data grid displays the current value of the item to be changed, **Item as it Appears** and the updated value of the item to be changed, **Item as it Should Be**.
9. The Amendments page allows the user to add multiple amendments to a record. Simply select the Page to Amend dropdown and select a new page to Amend – following steps 6 through 7 again.

10. Before the Amendment is submitted to the Local Registration Office for approval it must be Affirmed. Once you have made all of the changes needed for the Amendment, from the Amendments Menu select the Amendment Affirmation link. The Affirmations page will be displayed.

11. Place a checkmark in the box next to the affirmation statement and then select Affirm to certify the amendment and submit it to the Local Registration Office for approval, or select Clear to clear all entries, or select Return to leave this page without affirming and return to the previous page.

12. Once the amendment is affirmed a checkmark will appear next to the Amendment Affirmation link in the Amendments Menu. The Amendment Status will be updated from Keyed (Requires Affirmation) to Pending. The amendment will also no longer allow for changes as the Save and Clear buttons are now disabled.

13. Use the Return button to close this page and return to the Death Registration Menu.
**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. The Main Menu is continuously displayed across the top of the DRIVE screen when logged in.

From the Main Menu, select Queues. Queues contain registrations, orders, or amendments which have a work queue status assigned. 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, Registration Work Queue Summary.

   ![Registration Work Queue Summary](image)

   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.**

   ![Click any of the column headers to re-sort the Work Queue Summary](image)

<table>
<thead>
<tr>
<th>Queue Name</th>
<th>Type</th>
<th>Count</th>
<th>Age of Oldest in Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certification Required</td>
<td>Death</td>
<td>19</td>
<td>71</td>
</tr>
<tr>
<td>Medical Certification Requested</td>
<td>Death</td>
<td>19</td>
<td>82</td>
</tr>
<tr>
<td>Medical Pending</td>
<td>Death</td>
<td>3</td>
<td>82</td>
</tr>
</tbody>
</table>

2. **Queue Name** indicates the type of work that needs to be done in the queue, **Type** indicates which type of event, (Death or Fetal Death), the queue contains work for. **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 2 cases in the **Registration Approval Required** queue.
4. Click on the **Registrant** name link to display that record for review or editing. This will open up record and display the Decedent Page.
Exercise 2: Work Queues - Search

Skills Learned: In this exercise you will learn how to search for cases based on their queue status.

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

NOTE: The work queues available vary based on user type and user security setup.

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.

3. To narrow your search you can use all three or a combination of the three search parameters. However, you must always make a selection from the Queue dropdown list.

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.
**Coroner Features**

**Exercise 1: Coroner Review Case**

**Skills Learned:** In this exercise you will learn to use the Coroner Review Case page to accept, decline, pend, or take ownership of a record.

The Coroner Review Case page provides the ability for a coroner to accept a referral, decline a referral, take control of a case or to set the referral action to pending.

1. From the Death Registration Menu, select Other Links -> Coroner Review Case. Notice that both Referral Action and Coroner Case Number are marked with red arrows (红色箭头) indicating that these are mandatory fields.

2. Make a selection from the Referral Action dropdown list:

   About Referral Actions:
   a. **Accept Referral** is used for cases referred to Coroner that can occur at any point in the registration process including after filing.
   b. **Decline** is used to deny taking ownership or control of a record.
   c. **Pending** is used to handle those cases where the Coroner determines that additional discussion is needed with the physician before making a determination on the case or when the cause of death is inadequate or incomplete.

**Note:** Access to the Coroner Review Case page is restricted based on user security privileges. You may or may not be able to access this page.
3. Note that once a selection has been made from the **Referral Action** dropdown list, a system message is automatically entered into the **Message** box. This message can be used as is, edited, or deleted entirely.

4. As noted above, **Coroner Case Number** is marked by a red arrow ( ), and is a mandatory field. Enter the appropriate case number and select **Clear** to clear all entries and start over, **Save** to save your changes and take the referral action selected, or **Return** to return to the **Death Registration Menu** without saving your changes.
Appendices

Appendix 1 - Glossary of Icons and Controls

There are several different types of icons and controls used in DRIVE. Many of these are industry-standard or universal controls that 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.

![Auto-populate Button Example](image)

- **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](image)

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

  ![Calendar Dropdown Example](image)

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

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: 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.
**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.

![Decedent's Occupation and Decedent's Industry fields](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.

![Single Race Self Designation Dropdown](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.

![Race Choices](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

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.

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:
### Input Formats

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