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The Industry Standard in Vital Records Integrated Systems
List of State Contacts

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<tr>
<th>Name</th>
<th>Email</th>
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<td>Vital Records 411</td>
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Revision History

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1. ABOUT THE COLORADO ELECTRONIC DEATH REGISTRATION SYSTEM

The Colorado Electronic Death Registration System (EDRS) improves timeliness and accuracy of death registration in Colorado by allowing all parties (funeral homes, physicians, coroners, local registrars, and the state office) to participate and communicate electronically. The application is designed to communicate automatically and on command to all applicable users.

1.1 INTENDED AUDIENCE

This user guide is intended for medical certifiers (physicians, coroners, and deputy coroners) who use the Colorado EDRS to create and process death records for the state of Colorado. The primary duty of medical certifiers is to complete the medical information for a decedent under their care. The concept of participating in the completion of an electronic death record is referred to as Death Registration Data Entry. The duties of medical certifiers vary depending on the case and user type, and this user guide helps to explain specific duties of medical certifiers in specific circumstances.

1.2 HOW TO USE THIS DOCUMENT

The purpose of this document is to provide users with a comprehensive overview regarding the features and functionalities of the Colorado EDR System as it pertains to Medical Certifiers.

On the previous page, users will find the Table of Contents section, detailing the various specifics that will be covered in this document. Each major topic that needs to be covered is broken-down into sections to provide a convenient reading experience for the user. In addition to sections, there are also sections within the major sections, referred to as subsections. These subsections expand upon the information presented in order to help the user build a more in-depth understanding of the features and functionalities of the EDR System.

In addition to the helpful text associated with each section and subsection, there are a wide variety of screenshots that will aid the user in more-clearly identifying the process or processes taking place. Each screenshot is accompanied by a title and Figure # in order to provide the reader with a sense of continuity throughout the document. These screenshots are meant to be used in conjunction with the text to help the user complete their daily tasks with the EDR System.
2. DEATH REGISTRATION DATA ENTRY AND CIRCUMSTANTIAL FUNCTIONALITY

This section provides detailed information regarding the Colorado Death Registration Data Entry System, as well as a comprehensive overview of the supplemental processes associated with the data entry. A user must have the appropriate facility and security privileges assigned to their user account in order to replicate steps in this section.

This section is divided into the following chapters:

- Standard Process Flow when Medical Certifier Starts a Record—2.1
- Notifications—2.2
- General Death Registration Data Entry Topics—2.3
- Start and Save a New Record—2.4
- Search for a Record—2.5
- Cancel Changes—2.6
- Abandon a Record—2.7
- Situational Functionality on the Death Registration screen—2.8
- Unresolved Fields List—2.9
- Designate a Funeral Home—2.10
- Re-Designate a Medical Certifier—2.11
- Drop-to-Paper—2.12
- Refer to Coroner—2.13
- Certify a Death Record—2.14
- De-Certify a Death Record—2.15
- Decline a Record—2.16
- Unique Coroner Roles—2.17
- Release a Record—2.18
- Pending Cause of Death—2.19
- Print Forms and Letters—2.20
- Medical Certifier Reports—2.21
2.1 STANDARD PROCESS FLOW WHEN MEDICAL CERTIFIER STARTS A RECORD

The steps listed below represent the standard registration process when an electronic death record is started by a medical certifier. The process flow may delineate from the standard registration process during special circumstances, and these scenarios are also explained below:

1. Login to the application and go to the Medical Data Entry screen.
2. Start and save a new record (refer to Start and Save a New Record—2.4).
3. Complete the required fields to designate a funeral home and designate the record to a funeral home (refer to Designate a Funeral Home—2.10).
   a. If the funeral home is not participating in the Colorado EDRS, the medical certifier will have to drop to the record to paper. Refer to Drop-to-Paper—2.12 for instructions on dropping to paper during different stages of Demographic Data Entry.
   b. Certain scenarios require a coroner to transfer jurisdiction. Refer to Transferring Jurisdiction—2.17.2 for more information.
   c. A medical certifier will not need to designate a funeral home if a hospital disposition is occurring.
4. Complete Medical Data Entry. Refer to General Death Registration Data Entry Topics—2.3, Situational Functionality on the Death Registration screen—2.8, and Unresolved Fields List—2.9 for helpful information on completing Medical Data Entry.
   a. A medical certifier will complete the entire record if a hospital disposition occurs. Refer to Method of Disposition Panel—2.8.4.2 for more information.
5. After completing Medical Data Entry, certify the death record (refer to Certify a Death Record—2.14).
   a. The user may need to de-certify the record in order to revise information on the record. Refer to De-Certify a Death Record—2.15 for more information.
   b. The record may require co-signing by a coroner after a physician certifies the record. Refer to Co-Signing Functionality—2.17.3 for more information on co-signing. Furthermore, a coroner may de-certify a record and change information if a record was automatically or manually referred to them after a physician certifies the record. Refer to De-Certifying a Record at a Coroner Office—2.17.1 for more information.
6. If a participating funeral home was designated, the record will be released by the funeral home. If a record was dropped to paper or a hospital disposition occurred, the medical certifier will release the record (refer to Release a Record—2.18).
   a. If the record remained entirely electronic, the record will receive a state file number (SFN) and be automatically released to the state office after the funeral home (or medical certifier in the case of a hospital disposition) releases the record.
   b. If the record was dropped to paper by the medical certifier, the record will enter the local registrar's work queue. The record will receive an SFN after the state office updates all demographic information on the electronic record.
2.2 NOTIFICATIONS

A medical certifier will receive notifications based on various scenarios in the Colorado EDRS. These notifications are explained below:

1. The medical certifier and coroner receive an email notification in cases where a record is referred to both a physician and coroner. The medical certifier may receive this message multiple times because the funeral home has the ability to click a button as many times as needed in order to remind the medical certifier to certify the record.

2. If a medical certifier certifies a record and the funeral home refers the record to a coroner office after medical certification by the physician, the medical certifier and any copied recipients will receive an email notification if the coroner office de-certifies the record. The same email is sent to the medical certifier and copied recipients if the medical facility refers the record to a coroner after medical certification and the coroner de-certifies the record.

3. If the local registrar rejects a partially electronic record that was dropped to paper, the medical certifier that certified the record and any copied recipients receive an email notification.

4. If a record becomes a late record after the medical certifier started the record or was designated by a funeral home, the medical certifier that started the record and any copied recipients receive an email notification that they currently own a late record.

5. The medical certifier that certified the record and any copied recipients receive an email notification if they start a record, complete absolute mandatory fields on a demographic tab, designate a funeral home, and the funeral home changes the values for any of the following demographic fields: Decedent First Name, Decedent Last Name, Decedent Suffix, Place of Death, Date of Death, or Date of Birth. The email will not list any of the fields that were changed. Instead, the medical certifier can simply retrieve the record again through a unique work queue filter and review the new values before certifying the record again.

6. If a designated medical certifier is working on a record and the funeral home designates another medical certifier in the meantime, the first medical certifier will receive a message when they attempt to save the record that the record has been designated to another facility.

2.3 GENERAL DEATH REGISTRATION DATA ENTRY TOPICS

The objective of this section is to address general functionality in order to let users explore the Medical Data Entry screen. Users should have a comprehensive understanding of all data entry procedures before actively using the CO EDR to enter real records. Use all chapters in this section to acquire an understanding of all processes associated with completing electronic death records. For conditional information related to Medical Data Entry, refer to Situational Functionality on the Death Registration screen—2.8.
2.3.1 SCREEN TAB NAVIGATION

The Colorado EDR is designed with an emphasis on enhancing data entry logistics by providing intuitive interfaces. Mouse navigation, keyboard navigation, or a combination of the two are equally accessible methods that, along with several of Genesis’ proprietary and convenient features, help streamline workflow.

2.3.1.1 USING THE KEYBOARD TO NAVIGATE BETWEEN TABS

The following keys allow for easy navigation through the screens in the Colorado EDR without using the mouse:

**TAB:** The Tab key is a Windows-standard for navigating from one control field to another. A ‘control-field’ refers to anything on the screen that either accepts user input or enables application-action. When the user has navigated to a control-field, that specific control-field will always display differently than the other fields on that page to indicate to the user what field they have navigated to.

**NOTE:** The Tab key and the mouse can be used together in whatever fashion is most convenient for the user. Use of the keyboard and mouse is not mutually exclusive.

**SHIFT + Tab:** Holding down the Shift key and pressing Tab simply reverses the ‘Tab order’ and returns the user to the previous control-field on the page.

**ENTER:** The Enter key typically means ‘execute’. It is the equivalent of double-clicking with a mouse.

**Left/Right/Up/Down Arrows:** These keys are used to navigate within a field or within a drop-down field. Within a field, the Left and Right arrows will move the cursor back and forth to let the user change a specific letter or number. The Backspace and Delete keys also operate within a field to allow editing. Within a drop-down list, the Up and Down arrows can be used to navigate through the list. The PgUp and PgDn keys can also be used.

**Down Arrow for Drop-down Box:** The small arrow pointer (drop-down arrow) on the right-hand side of a field indicates that there is more than one acceptable value for that particular field. The user may click on the drop-down arrow to cause the list to open and then use the mouse to scroll through and select a choice. If the user prefers to keep their hands on the keyboard, they can press the Down arrow on the keyboard to open the list. Then, users can scroll through the selectable options by utilizing the Down and Up arrows to navigate through the list.

**Mind’s-Eye (Type-Ahead Logic):** Type-Ahead Logic provides another way to save time by eliminating the number of keystrokes to generate a selection from a drop-down field. This feature enables the system to begin generating selections from the drop-down menu, as the
user is typing into the field. The drop-down field will begin filtering-out all of the menu items that do not match the letters that the user is typing. For example, a user can begin typing the name of the state, and the list will filter to states beginning with the same letters (e.g. typing-in the letter ‘T’ into a drop-down menu will filter-out all other states with the exception of Tennessee and Texas).

**Space Bar:** This key can be used to mark and unmark a checkbox and radio-buttons.

### 2.3.1.2 USING THE MOUSE TO NAVIGATE BETWEEN TABS

The mouse is one tool that can be used to navigate throughout the Colorado EDR System. Click on the various items (hyperlinked text and/or icons) on the menu. The mouse can also be used to navigate from one field to another during data entry.

**NOTE:** Some mouse devices have built-in shortcut functionality, including ‘Back’ and ‘Forward’ buttons. Genesis recommends **not** using these to navigate the application, as it could create a circumstance where the user may lose all unsaved progress.

On the left-side of the screen are what are referred to in this document as ‘tabs’ (e.g. **Decedent**, **Residence Relations**, **Race / Education**, etc.). Tabs are the sections of a record that need to be filled in order to process the record.

Users can navigate between tabs by using the mouse to click-on the tab that they wish to use. Additionally, users can also click the **Next Tab** or **Previous Tab** buttons on the toolbar to navigate between tabs.

**Note:** The tab that users are currently using will look differently than the other tabs. See how the **Decedent** tab in the screenshot to the right is currently outlined in blue lines and boxed-in by a shade of white?

### 2.3.2 ADD ON THE FLY (AOF)

#### 2.3.2.1 PLACE OF DISPOSITION

A medical certifier may need to complete the disposition information on the Disposition tab if a hospital disposition is not identified on the record and the medical certifier has not yet designated a funeral home. If the user selects ‘Burial-Cemetery’, ‘Cremation’, or
‘Entombment’ from the **Method** drop-down field on the **Disposition** tab, and the place of disposition *does not* appear in the **Place/Name of Cemetery/Crematory** drop-down field even though it is a valid entry, the user can add the location on-the-fly. This process is referred to as ‘Add on the Fly’ (AOF). The State office will ultimately validate the new entry. To access AOF when selecting a place of disposition:

1. Open the **Place/Name of Cemetery/Crematory** drop-down field after marking and selecting the appropriate value in the **Method** drop-down field.

2. Use the mouse or the ‘Down-Arrow’ on the keyboard to scroll-down to the bottom of the list. Select the ‘Add New’ option as shown in Figure 2.

3. The AOF – **Place of Disposition** screen will appear as shown in Figure 3:
Figure 3: Place of Disposition ‘Add New’ screen

4. Complete at least the required data entry fields for the new entry. Click the OK button to save the new entry. The State office will ultimately add the entry as a new place of disposition or validate the entry as an existing place of disposition.

Note: Fields marked with a red asterisk (звездыш) are mandatory fields that must have data entered or selected in order for the user to proceed with the record creation

2.3.2.2 FUNERAL HOME

If a medical certifier needs to file on behalf of a funeral home, they are required to mark the appropriate checkbox on Disposition tab and search for the funeral home. If the funeral home is not in the searchable list, even though it is a valid entry, the user can add the non-participating facility on-the-fly. To access AOF functionality while filing on behalf of another funeral home:

1. Open the Facility Name drop-down field after marking the Filing on Behalf checkbox.

2. Use the mouse or ‘Down-Arrow’ on the keyboard to scroll to the bottom of the list.

3. Select the ‘Add New’ option as shown in Figure 6.
Figure 4: ‘Add New’ Drop-down Option

4. The Add New screen will appear as shown in Figure 7:

Figure 5: Funeral Home ‘Add New’ screen
5. Complete at least the required data entry fields for the new entry. Click the OK button to save the new entry. The state office will ultimately add the entry as a new funeral home or validate the entry as an existing funeral home.

Note: Fields marked with a red asterisk (☆) are mandatory fields that must have data entered or selected in order for the user to proceed with the record creation.

### 2.3.2.3 CERTIFIER

If a medical facility or coroner office needs to add a new certifier during the registration process, they are required to add the medical certifier on the fly on the Medical-COD tab. This process is referred to as ‘Add on the Fly’ (AOF). The state office will ultimately validate the new entry. To access AOF while completing Certifier Information on the Medical-COD tab:

1. Select the appropriate value from the Type drop-down field and tab to the Name field. The Type drop-down field will show the value of ‘Certifying Physician’ if a medical facility is working on the record, and the Type drop-down field will show the value of ‘Coroner’ and ‘Deputy Coroner’ if a coroner office is working on the record.

2. Use the mouse or ‘Down Arrow’ to scroll down to the bottom of the list. Select the ‘Add New’ option as shown in Figure 6.

![Figure 6: “Add New” Dropdown Option](image)

3. The Add New screen will appear as shown in Figure 7:
4. Complete at least the required data entry fields for the new entry. Click the ‘OK’ button to save the new entry. The state office will ultimately add the entry as a new medical certifier or validate the entry as an existing medical certifier.

2.4 START AND SAVE A NEW RECORD

The Medical Data Entry menu item allows authorized users to create new records and work on existing records. In order to start a new record:

1. From the Function drop-down menu on the top-toolbar of the application, click-on Medical Data Entry.
Figure 8: Selecting Demographic Data Entry From the Top Toolbar

2. The Medical Data Entry screen will generate as shown in Figure 9:

Figure 9: Default Medical Data Entry screen

3. After clicking the New button or ‘New’ from the Registration drop-down menu on the top-toolbar, the screen will unlock and allow user entry. The first field accessible to the user is the Record Type drop-down field. Users will also note that in addition to the fields being enabled, the tabs on the left-hand side of the screen (e.g. Decedent, Residence Relations, Race Education, Disposition, etc.) are also enabled and will allow the user to select them.

4. Before attempting to first save the record, the user must complete the following mandatory fields:
**Field Name** | **Action**
---|---
Record Type | Defaults to ‘Identified’ but can be changed to ‘Unidentified’.
Date of Death | Enter date.
Date of Death Type | Select ‘Actual Date of Death’, ‘Presumed Date of Death’, ‘Approximate Date of Death’, ‘Found on’, or ‘Court Determined Date of Death’.
Sex | Select sex.
Social Security Number | Enter SSN or select a value from the ‘Social Security Number not available’ drop-down field.
Decedent’s Last Name | Enter name. This field will default to ‘Unknown’ if an ‘Unidentified’ record type is chosen.

**Note:** The fields marked with a red asterisk (☆) are the mandatory fields that must have data entered or selected in order for the user to proceed with the record creation.

a. If the user changes the record type from ‘Identified’ to ‘Unidentified’ or vice versa at any point during Demographic Data Entry, the message shown in Figure 10 will appear, and the user will be required to resolve all fields again if they select **Yes**:

![Figure 10: Changing a Record Type Message](image)

5. After completing the mandatory fields, the user may select the **Save** button or ‘Save’ from the drop-down menu under **Registration** on the top-toolbar. The message shown in Figure 11 will appear if the new record was saved successfully:

![Figure 11: Message after First Successful Save](image)

6. The application will automatically search for potential duplicate records when the record is saved. If the application suspects a potential duplicate the message in Figure 12 will appear:
Figure 12: Potential Duplicate Message

b. The user can click OK in order to continue saving the record. The record will be marked as a potential duplicate; OR
c. The user can click Cancel to return to the Medical Data Entry screen without saving the record.

7. Proceed with Medical Data Entry by completing the demographic fields on the appropriate tabs.

2.5 SEARCHING FOR RECORDS

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

- Search Screen
- Work Queue Search

2.5.1 SEARCH SCREEN

1. After arriving to the Medical Data Entry screen, click on the Search button or select ‘Search’ from the drop-down menu under Registration on the top-toolbar. The Death Search screen will appear as shown in Figure 13:
2. Enter information about the record(s) that need to be retrieved to the **Medical Data Entry** screen.

**Helpful Hints & Tips**

- Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question; but include other items to reduce the number of matches.
- The **Decedent’s Date of Death** is a mandatory field, unless the user searches for a specific EDR number.
- Along with a name, including the **Decedent’s Date of Death** (which can be entered as a series of oos followed by a year-i.e.-.00/00/2014), **Decedent’s Sex**, and other information will reduce the number of matches that are returned and expedite the search results.
- Choosing the radio-button next to **Soundex** still requires the user to enter at least the **Decedent’s Date of Death**.

---

*Figure 13: Death Search screen*
If the user also decides to search by a name, the full name must be entered in the appropriate name field(s) and the application will search for exact matches, as well as names that sound familiar as well.

3. After entering search parameters, click the **Search** button. Records that match the search criteria will populate the grid on the bottom of the search screen as shown in Figure 14:

![Figure 14: Death Search screen Results](image)

**Note:** The Death Search screen will only return results for unregistered records. If you need to print forms for registered records, refer to [Printing Forms from the Registered Record Search screen—2.16.2](#).

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

5. Click the **Select Record(s)** button to retrieve the record(s) to the work queue on the Local Registration Review Screen. The selected record will appear on the screen. If multiple records were selected, the first selected record will appear on the screen and the rest of the records will appear in the **Unresolved Work Queue**.
2.5.2 WORK QUEUE

The work queue on the Medical Data Entry screen will contain all records associated with the user’s login location that still require some type of action. Records in the work queue will be sorted by the date-of-death and will display the Decedent’s Last Name, Decedent’s First Name, and Decedent’s Date of Death. In order to select records from the Unresolved Work Queue:

1. After arriving to the Medical Data Entry screen, select the Unresolved Work Queue Filter drop-down and apply the appropriate filter as shown in Figure 5.

![Figure 15: Unresolved Work Queue Filters]

Options include:

- **All Unresolved**: All records that have been started but information is not yet complete. The application will default to this work queue filter.
- **Awaiting Medical Certification**: All records awaiting medical certification.
- **Drop-to-Paper**: All records that have been dropped-to-paper but not yet registered by the local registrar.
- **Medical Data Entry Incomplete**: All records with incomplete Medical Data Entry.
- **Pending Cause of Death**: All records that were registered with a pending cause of death. The only fields enabled for these records are the cause of death fields.
- **Ready for Release**: All fully electronic records that have been demographically verified by the medical facility and medically certified. No funeral home is involved in this scenario.
- **Re-Certification Needed for Changed Fields**: All records that were started by the medical facility and certified by a medical certifier, but the funeral home changed certain fields on the demographic portion of the record that were certified by the medical certifier.
- **Referred to Coroner**: All records that were automatically or manually referred to the county coroner and awaiting medical certification by the county coroner.
- **Rejected**: All records rejected back to the medical facility by the local registrar.
- Submitted to Funeral Establishment: All records that have pending demographic verification but completed medical certification.

Specific Coroner Filters

- Coroner Review Pending: All records that were referred for review by a funeral home user or physician. All records included in this filter have not been certified or declined by the coroner.
- Pending Acceptance: If a coroner transfers jurisdiction to another coroner, the second coroner can use this filter type to retrieve a record and then accept or decline the record.
- Transfer: All records that were transferred to the coroner, but the record has not been formally accepted by the coroner. The first coroner can use this filter type to know if the record has been accepted by the second coroner or not.

2. After selecting the appropriate filter, the Unresolved Work Queue will populate with all appropriate records. Click on the Unresolved Work Queue drop-down arrow and select a record from the list, or begin typing the last name of the decedent and press Enter when the appropriate record is highlighted.

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

2.6 CANCEL CHANGES

A user may cancel changes made to record since it was last saved during Medical Data Entry. In order to cancel changes:

1. Retrieve an existing record using the Search screen—2.5.1 or Work Queue—2.5.2.

2. Enter new information, or modify information on the record

3. Click the Cancel button or select ‘Cancel’ from the drop-down menu under Registration on the top-toolbar. The message shown in Figure 16 will appear:

![Death Registration](image)

Figure 16: Cancel Message
a. If the user clicks ‘No’ in this message, the changes will not be canceled and the user will return to the Medical Data Entry screen.

4. Click ‘Yes’ to cancel the changes made to the record. The user will return to the Medical Data Entry screen, and the record will appear in the format that was last saved.

### 2.7 ABANDON A RECORD

Certain scenarios may require a user to Abandon a Record. For example, a user may save a record only to realize afterwards that the record is a duplicate record. In order to abandon a record:

1. Retrieve an existing record using the Search screen—2.5.1 or Work Queue—2.5.2.

2. Select the Abandon button or select the Registration/Abandon menu item. The message shown in Figure 17 will appear:

![Abandon Record Message](image)

**Figure 17: Abandon Record Message**

a. If the user clicks No in this message, the record will not be abandoned and the user will return to the Medical Data Entry screen.

3. Click Yes and the Abandon Record screen will generate permitting users to enter a comment of up to 150 characters:

![Abandon Record Comment screen](image)

**Figure 18: Abandon Record Comment screen**
a. If the user clicks **Cancel** in this message, the **Abandon Record** screen will disappear and the user will return to the **Medical Data Entry** screen. The record will not be abandoned.

4. Enter a comment about why the record needs to be abandoned, and click the **OK** button.

5. The message shown in Figure 19 will appear once the record has been abandoned successfully.

![Figure 19: Successful Abandon Message](image)

6. Click **OK** to close the message. The user will return to the **Medical Data Entry** screen.

## 2.8 SITUATIONAL FUNCTIONALITY ON THE DEATH REGISTRATION SCREEN

Some fields are interdependent on other fields in the Colorado EDRS. For example, the values entered in a textbox or selected from a dropdown may have specific implications on other fields during Demographic Data Entry and Medical Data Entry. This chapter addresses these conditionals in order to guide the user through different data entry scenarios.

Certain scenarios enable the Demographic Data Entry fields for medical certifiers:

- The medical certifier starts the record and works on Demographic Data Entry fields before designating a funeral home.
- The medical certifier indicates a “Hospital Disposition” on the record and must complete the Demographic Data Entry fields on the record before releasing the record (refer to the “Hospital Disposition” functionality in [Method of Disposition Panel—2.8.4.2](#)).

If a funeral home designates a medical certifier, the Demographic Data Entry fields will not be enabled. The medical certifier will simply be required to complete the Medical Data Entry fields. Situational functionality for Demographic Data Entry fields begins with the [Decedent Tab—2.8.1](#), and situational functionality for Medical Data Entry fields begins with the [Medical-Injury Tab—2.8.5](#).
2.8.1 DECEDEENT TAB

2.8.1.1 AGE AND AGE UNITS

If the decedent’s date of death and date of birth are more than one day apart, the “Age” and “Age Units” fields will auto-populate after the user enters dates into the “Date of Death” and “Date of Birth” fields.

If the decedent’s date of death and date of birth are the same day or only one day apart, the “Age” and “Age Units” fields will require manual completion.

2.8.1.2 SOCIAL SECURITY NUMBER FIELDS

Normally, a user will enter the decedent’s SSN before saving the record for the first time (since the SSN is an absolute mandatory field). If the SSN is known, the SSN is sent to the Social Security Administration (SSA) for verification after the first save.

There may be times when a social security number (SSN) is not known. In these cases, the user is required to select a value from the “Social Security Number not available”. Depending on the reason why the SSN is not known, the user will select one of the following values from this dropdown:

- None
- Not Obtainable
- Pending
- Unknown

After selecting one of these values, the “Social Security Number” field will become disabled and become resolved. This functionality is shown in Figure 20:

![Figure 20: Disabled Social Security Number Field](image)

In the event that the SSN becomes known, the user can remove the value from the “Social Security Number not available” dropdown field and then enter the SSN in the “Social Security Number” field.
2.8.1.3 PLACE OF DEATH PANEL

After starting a new record or continuing work on an existing record, the user will eventually have to select a value from the “Type of Place” dropdown field under the Place of Death panel. If the user selects one of the following values, all other values under the Place of Death panel will become disabled except for the “Place of Death” dropdown field:

- Hospice Facility
- Hospital-Dead on Arrival
- Hospital-Emergency Room/Outpatient
- Hospital-Inpatient
- Nursing Home-Long Term Care Facility
- Other

After selecting one of the values listed above, the “Place of Death” dropdown field will populate with all of the selected type of facility. The user will be required to select a specific facility from the “Place of Death” dropdown, and the facility’s information will auto-populate the fields under the Place of Death panel. These processes are shown in Figure 21:

![Figure 21: Facilities Listed in “Place of Death” Dropdown Field](image)

Alternatively, if the user selects any of the following values from the “Type of Place” dropdown field, fields will become enabled under the Place of Death panel and require manual completion:

- Decedent’s Home
The only fields that will become disabled in this case are the “Place of Death” dropdown field and the “State/Country” textbox (and the “Other (Specify)” textbox if “Decedent’s Home” or “Unknown” was specified). The “State/Country” textbox will default to “Colorado”. If the user specifies “Other (Specify)” in the “Type of Place” dropdown field, the “Other (Specify)” textbox will also become enabled. These processes are shown in Figure 22:

![Figure 22: Enabled Fields under the Place of Death Panel](image)

**Note:** If the Type of Place is “Decedent's Home”, “Other (Specify)”, or “Unknown”, and the user performs one of the following actions, the “Zip Code” dropdown will accept a “?” to indicate unknown:

- Selects “Unknown” from the “County” and “City/Town” dropdown fields
- Selects “Other” in the “City/Town” dropdown after selecting a county
- Selects a city/town with no matching zip code

### 2.8.2 RESIDENCE RELATIONS TAB

#### 2.8.2.1 DECEDENT’S RESIDENCE ADDRESS PANEL

If the decedent was homeless, the user will only need to complete several fields under this panel.
In order to indicate that the decedent was homeless, the user must mark the “Decedent was Homeless” checkbox at the top of the Residence Relations tab. After checking this box, the only fields that will remain enabled under this tab are the “State/Country” and “Inside City Limits” dropdown fields. These fields will require a resolved status even if the decedent was homeless. This functionality is shown in Figure 23:

![Figure 23: Functionality when Decedent was Homeless](image)

**Note:** If the user selects a foreign country in the “State/Country” dropdown, the “Inside City Limits” dropdown will become disabled and default to “Unknown”, the “City (Other)” field will become enabled, and the remaining address fields for county, city/town, and zip will become disabled.

### 2.8.2.2 DECEDENT’S MARITAL STATUS PANEL

The spouse/partner name fields under this panel are dependent on the value selected from the “Marital/Civil Union” dropdown field. If the following values are selected from this dropdown, the name fields will become enabled:

- Civil Union
- Married
- Married, but Separated
- Widowed (and not Remarried)

This functionality is shown in Figure 24:

![Figure 24: Marital/Civil Union Fields](image)

If the user selects any of the following values from the “Marital/Civil Union Status” dropdown field, the name fields will become disabled:
- Divorced (and not Remarried)
- Never Married
- Unknown

### 2.8.2.3 DECEDENT’S PARENTS

The value selected in the “Same Sex Parents” dropdown field will determine whether or not the “Title/Role” dropdown field becomes enabled. This dropdown will default to “No”.

If the user selects “Yes” in the “Same Sex Parents” dropdown field, the “Title/Role” dropdown field will become enabled, and the value selected from this dropdown field will affect the field names for the parents.

For example, selecting “Co-Parent-Father” will make the first set of parent name fields read “Co-Parent First Name”, “Co-Parent Middle Name” and Co-Parent Last Name, while the second set of fields will read “Father’s First Name”, “Father’s Middle Name”, etc. This functionality is shown in Figure 25:

![Figure 25: Same Sex Parent Functionality](image)

### 2.8.3 RACE EDUCATION TAB

#### 2.8.3.1 OCCUPATION AND BUSINESS/INDUSTRY FIELDS

These fields will be disabled if the decedent was under the age of 14. If the user processes a record and specifies that the decedent was 14 years or older on the Decedent tab, the “Occupation” and “Business/Industry” textboxes will be enabled on the Race Education tab. This functionality is shown in Figure 26:
2.8.3.2 HISPANIC ORIGIN AND RACE

Once a user marks a checkbox under the Hispanic Origin panel, the rest of the checkboxes under this panel will become disabled. If the user selects “Yes, Other Spanish/Hispanic/Latino (Specify),” the textbox below will become enabled and require a value. This functionality is shown in Figure 27:

Figure 27: Hispanic Origin Functionality

The user is able to identify multiple races under the Decedent’s Race panel. Certain values will enable textboxes, and at least one textbox will require a value in order for the race value to become resolved. This functionality is shown in Figure 28:
2.1.1 DISPOSITION TAB

The Disposition tab enables users to enter information as it pertain the Informant Information, Funeral Home information, Method of Disposition, and Filing On Behalf Of Funeral Home (if applicable).

2.1.1.1 INFORMANT INFORMATION

If the user selects the ‘Other’ from the Relationship to Decedent drop-down field, the Relationship Other field will become enabled and require user input. This functionality is shown in Figure 29:

2.1.1.2 METHOD OF DISPOSITION PANEL

The Place/Name of Cemetery/Crematory field will remain enabled and populate with specific places of disposition if the user selects one of the following values from the Method drop-down field:

- BURIAL – CEMETERY
- CREMATION
- ENTOMBMENT
This functionality is shown in Figure 30:

![Figure 30: Populated Places of Disposition](image)

Alternatively, all of the fields under this panel will become enabled and require user input if the user selects one of the following selections from the **Method** drop-down menu.

- DONATION
- ALKALINE HYDROLYSIS
- OTHER
  
  **Note:** If the user selects ‘Other’ in the **Method** drop-down field, the **Method Other** field will become enabled as well

- REMOVAL FROM STATE
- BURIAL – PRIVATE LAND

This functionality is shown in Figure 31:
Lastly, should the ‘Hospital Disposition’ selection be made from the Method drop-down menu, users will first receive the following message:

![Hospital Disposition Message](image)

When the user selects Yes, the system will automatically pre-populate the required fields and simultaneously disable them – preventing user input.

![Hospital Disposition Method](image)
Note: It is important to understand that in order to select the ‘HOSPITAL DISPOSITION’ option from the Method drop-down menu, users must have already inputted information into the following fields:

- Record Type
- Decedent’s Last Name
- Decedent’s Sex
- Decedent’s Date of Death
- Decedent’s SSN
- Place of Death County

Note: Should users not have that information inputted prior to selecting ‘HOSPITAL DISPOSITION’, users will receive the following error message:

![Error Message](image)

Figure 34: Hospital Disposition Error

### 2.1.2 MEDICAL-INJURY TAB

If the medical certifier indicates that the death did not involve an injury or it is unknown if the death involved an injury, the remaining fields on the Medical-Injury tab will be disabled (except for the Coroner Record Number if a coroner is working on the record). If the death did involve an injury, fields will become enabled on the Medical-Injury tab and it is important that the medical certifier completes the injury fields. The sub-sections below account for the death involving an injury.

#### 2.1.2.1 INJURY TYPE/DATE/TIME PANEL

If a coroner is working on Medical Data Entry, the Coroner Record Number textbox will be enabled as shown in Figure 35:
If the user selects 'Other' in the Decedent’s Role drop-down field, the Role Other textbox will become enabled as shown in Figure 36:

Figure 36: Enabled “Role Other” Textbox
If the user selects any of the following values from the **Time of Injury Type** drop-down field, the **Time of Injury** field will become enabled:

- Actual Time of Injury
- Approximate Time of Injury
- Presumed Time of Injury
- Court Determined Time of Injury

If any of the values listed above are selected, the user is required to enter a time. After tabbing-out of the **Time of Injury** field, the **Time Indicator** drop-down will become enabled, and the user will have to choose a value of ‘AM’ or ‘PM’. If the user enters military time, the **Time Indicator** drop-down will default to ‘Military’. This functionality is shown in Figure 37:

![Figure 37: Enabled Time of Injury Fields](image)

If the user selects any of the other values listed below, the **Time of Injury** field will default to ‘99:99’, the **Time Indicator** field will default to ‘Unknown’, and each of the fields will become disabled.

- Early AM
- Early PM
- Late AM
- Late PM
- Unknown AM
- Unknown Hour
- Unknown PM
2.1.2.2 PLACE OF INJURY PANEL

If the user selects any of the following values in the **Place of Injury** drop-down field, the address fields under the **Place of Injury** panel will become enabled as shown in Figure 38:

- Home
- Farm
- Residential Institution
- Military Residence
- Hospital
- School, Other Institution, Administrative Area
- Industrial and Construction
- Garage/Warehouse
- Trade and Service Area
- Mine/Quarry
- Street/Highway
- Public Recreation Area
- Institutional Recreation Area
- Sports and Recreation Area
- Other Building (the “Place Other” field will also become enabled if this value is selected)
- Other Specified Place (the “Place Other” field will also become enabled if this value is selected)
- Unspecified Place (the rest of the fields under the Place of Injury panel will become disabled)
NOTE: If the user selects any of the values listed above, selects a U.S. state and performs one of the following actions, the Zip Code drop-down will accept a ‘?’ to indicate unknown:

- Selects 'Other' in the City/Town drop-down after selecting a county (will also enabled City/Town (Other) field)
- Selects a City/Town with no matching Zip Code

Alternatively, if the user selects any of the values listed above and selects a foreign country in the State/Country drop-down, the City (Other) field will become enabled, and the remaining address fields for County, City/Town, and Zip will become disabled.

2.1.3 MEDICAL-COD TAB

The Medical – COD tab contains fields that pertain to the decedent’s cause-of-death. Within this panel, users will have the ability to enter-in specific data as it relates to the following subcategories: General Information, Pronounced Date / Time Of Death, Autopsy Information, Other Information, Cause of Death, Other Significant Conditions, as well as the Certifier’s Information.

2.1.3.1 GENERAL INFORMATION PANEL

Records can be registered with a pending cause of death. If the cause of death is pending, the medical certifier is able to mark the Cause of Death Pending checkbox on the Medical-COD tab. If the user marks the Cause of Death Pending checkbox, the fields
under the **Cause of Death** and **Other Significant Conditions** panels will become disabled as shown in Figure 39:
Figure 39: Pending Cause of Death Functionality on Un-Registered Record
The Cause of Death information must be updated when the information becomes available to the medical certifier. Refer to Pending Cause of Death—2.19 for information on updating Cause of Death Information.

### 2.1.3.2 PRONOUNCED DATE/TIME OF DEATH

If the user selects any of the following values from the Time of Death Type drop-down field, the Time of Death field will become enabled:

- ACTUAL TIME OF DEATH
- APPROXIMATE TIME OF DEATH
- COURT DETERMINED TIME OF DEATH
- PRESUMED TIME OF DEATH

If any of the values listed above are selected, the user is required to enter a time. After tabbing-out of the Time of Death field, the Time Indicator drop-down will become enabled, and the user will have to choose a value of ‘AM’ or ‘PM’. If the user enters military time, the Time Indicator drop-down will default to ‘Military’. This functionality is shown in Figure 40:

![Figure 40: Enabled Time of Injury Fields](image)

If the user selects any of the other values listed below, the Time of Death field will default to ‘99:99’, the Time Indicator field will default to ‘Unknown’, and each of the fields will become disabled.

- Early AM
- Early PM
- Late AM
- Late PM
- Unknown AM
- Unknown Hour
- Unknown PM
- Unknown Time of Death
2.1.3.3 AUTOPSY INFORMATION PANEL

If an autopsy was performed, the Autopsy Findings Considered drop-down field will become enabled as shown in Figure 41:

![Figure 41: “Autopsy Findings Considered” Field Enabled](image)

2.1.3.4 OTHER INFORMATION PANEL-MANNER OF DEATH

If the medical certifier selects any of the following values from the Manner of Death drop-down field, the record will be referred to the county coroner in the identified county of death automatically after the medical certifier performs medical certification.

- ACCIDENT
- COULD NOT BE DETERMINED
- HOMICIDE
- LEGAL INTERVENTION
- NATURAL
- PENDING INVESTIGATION
- SUICIDE

This record will appear in the Coroner Review Pending unresolved work queue filter. Refer to Unique Coroner Roles—2.17 for information about functionality unique to county coroner offices.

2.1.3.5 OTHER INFORMATION PANEL-COMMUNICABLE DISEASE

If a funeral home designates a record to a medical certifier, the Communicable Disease (International Shipments) drop-down will only be enabled if the funeral home identified an international place of disposition on the record. If a medical certifier starts a record, this dropdown will be enabled but non-mandatory.
Medical certifiers will not receive a message to print the appropriate Communicable Disease Letter if they are in charge of releasing the record. If a coroner is acting as a funeral home for a record, they may print the appropriate letter from the Registered Record Search screen. Refer to Printing Forms from the Registered Record Search screen—2.20.2 for more information.

### 2.1.3.6 CAUSE OF DEATH AND OTHER SIGNIFICANT CONDITIONS PANELS

The Cause textboxes allow the medical certifier to enter specific causes of death that were determined either at the time-of-death or through autopsy reports. The Cause textboxes and Other Significant Conditions textbox respond to a large variety of values automatically in order to help the medical certifier enter appropriate values in accordance with the updated NCHS Cause of Death Edit Specifications. Several examples are provided below to showcase the capabilities of the Cause textboxes and Other Signification Conditions textbox:

Entering an abbreviation such as 'FFF' will cause a message to appear as shown in Figure 42:

![Figure 42: VIEWS Spelling Message 1](image)

This message appears when the system does not recognize the values entered. In this particular case, the system did not understand a value of 'FFF'. From here, the user will have the opportunity to ignore the message by clicking ‘OK’, or clicking-on ‘Cancel’ and returning to the field to correct a potential mistake.

**NOTE:** The system attempts to assist the user by making a suggestion to the user. This suggestion is typically a value that looks similar, or has matching characteristics to the original value entered by the user.

Entering a non-specific cause of death such as "Cancer" will cause a message to appear as shown in Figure 43:
Figure 43: VIEWS Site Check Message

Entering a misspelled cause-of-death such as ‘Aphyxia’ will cause the spellchecker to indicate the term was spelled wrong, generating the following window to allow the user to correct the error.

Figure 44: VIEWS Spelling Message 2

2.1.4 COMMENTS

Certain functionality will cause comments to appear automatically on the record. For example, if a case is designated to a medical certifier and the medical certifier declines the record, the medical certifier will be required to enter a comment and the funeral home user will see the comment regarding the reason for declining the record.

Users may also add comments manually. In order to add a comment manually:

1. Click on the Comment tab and enter a comment into the textbox at the top of the screen.

2. After manually entering the comment, select the Add Comments button. The comment will appear under the ‘Funeral Establishment’ comment textbox because the funeral home added the comment. This functionality is shown in Figure 45:
Depending on the selected record, a number of actions need to be performed before a record is ready to be certified, released or further processed. In order to check if all demographic data items (if applicable) and medical fields are completed, use the **Unresolved Fields List** to identify areas that require some sort of action before the record is resolved. The list displays unresolved data fields as well as incomplete processes.
1. Retrieve an existing record using the Search screen—2.5.1 or Work Queue—2.5.2. Make sure the record has unresolved fields and processes.

2. Click the button above the Decedent tab. The Unresolved Fields List will open as shown in Figure 46:

![Figure 46: Unresolved Fields List](image)

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

### 2.3 DESIGNATE A FUNERAL HOME

A medical certifier is able to designate a funeral home after completing and saving the following fields:

- Record Type
- Date of Death Type
- Date of Death
- Sex
- SSN (if available)
- Last Name
- County of Death

1. After saving the fields listed above, the user should select the Demographic Designation from the Registration drop-down menu on the top toolbar.

2. The Demographic Designation screen will appear as shown in Figure 47:
3. Enter at least one search criteria. Search results will be narrowed and more specific if the user enters as much information as possible.

4. After entering the search criteria, click the ‘Search’ button. The grid will display all possible results as shown in Figure 48:
5. Select a funeral home from the grid. Click the ‘Designate’ button once it becomes enabled after selecting a funeral home from the grid.

6. If the designation process was completed successfully for a participating funeral home, the message shown in Figure 49 will appear.

![Figure 48: Search Results on the Demographic Designation screen](image)

![Figure 49: Successful Designation Message](image)

If the user designates a non-participating funeral home, the system will verify that the user wants to drop the record to paper. For more information on dropping a record to paper, refer to Drop-to-Paper—2.12.

A participating funeral home may take the following steps after designation depending on the type of medical certifier:
Complete and Verify the Record – If a funeral home is designated, they automatically ‘accept’ the record. The designated funeral home becomes the owner of the record and it is the funeral home’s responsibility to complete and verify the demographic section of the record. Any funeral home user with the verification process assigned to their account can verify the record.

Decline the record – Even though the record is automatically ‘accepted’, the funeral home can still decline the record. Once declining the record through the appropriate menu item, the funeral home user is required to enter the reason for declination in the comment section and the record returns to the medical certifier.

The medical certifier will only be able to view the demographic fields in a read-only format after designating a funeral home.

NOTE: A record may require re-certification if a record is certified and the funeral home changes certain demographic information after certification. If the funeral home changes any of the following fields after certification, the medical certifier will receive a message and have to re-certify the record:

- Decedent First Name
- Decedent Last Name
- Decedent Suffix
- Place of Death
- Date of Death
- Date of Birth

This functionality does not apply if a medical certifier starts a record and designates the record to a funeral home with any of the above fields blank. The medical certifier will not be required to re-certify the record if the funeral home updates any of the blank fields.

2.4 RE-DESIGNATE A MEDICAL CERTIFIER

A medical certifier is able to re-designate a medical certifier after completing and saving the following fields or receiving the record from a funeral home:

- Record Type
- Date of Death Type
- Date of Death
- Sex
- SSN (if available)
- Last Name
- County of Death
1. After saving the fields listed above or receiving a record from a funeral home that started a record, the user should select the Medical-Re-Designation option from the Registration drop-down menu on the top toolbar.

2. The Medical Certifier Designation screen will appear as shown in Figure 50:

![Medical Certifier Designation screen](image)

**Figure 50: Medical Certifier Designation screen**

3. Select the certifier type (physician, coroner, or associate/deputy coroner) and enter at least one search criteria. Search results will be narrowed and more specific if the user enters as much information as possible.

4. After entering the search criteria, click the ‘Search’ button. The grid will display all possible results as shown in Figure 51:
5. Select a medical certifier from the grid. Click the ‘Designate’ button once it becomes enabled after selecting a medical certifier from the grid.

6. If the re-designation process was completed successfully, the message shown in Figure 52 will appear.

![Figure 52: Successful Designation Message](image)

The re-designated medical certifier may decline the record back to the original medical certifier. If the original certifier refers the record to a coroner after certification, the coroner will have several options unique to the coroner office. Refer to Unique Coroner Roles—2.17 for more information on unique coroner roles.

### 2.5 DROP-TO-PAPER

A medical certifier can drop a record to paper for non-participating funeral homes several different ways. If the record is dropped-to-paper from the medical facility, the electronic and
certified medical information enters the local registrar’s work queue in the county of death. The medical information will appear in a read-only format, and the local registrar can only make minor corrections to the demographic portion of the record and release the record. The medical portion of the record can ultimately be updated by the state office, and the record will receive a state file number (SFN) once the demographic information is fully completed by the state office.

A local registrar also has the option to reject the partially electronic portion of the record back to the medical facility if changes are needed before registration. The medical certifier will receive an email notification in this case, and the record will appear under the medical certifier’s ‘Rejected’ work queue filter.

2.5.1 MENU OPTION

A medical certifier user may drop a record to paper after completing the minimum required fields:

- Record Type
- Last Name
- Decedent’s Sex
- Date of Death Type
- Date of Death
- SSN (if available)
- County of Death

1. After completing at least the fields listed above, the user can select the ‘Drop-to-Paper’ option from the Registration drop-down menu on the top-toolbar.

2. A confirmation message will appear to make sure the user wants to drop the record to paper.

Figure 53: Drop Record to Paper Confirmation Message

3. If the user selects Yes, the medical portion of the record will be dropped-to-paper, and the record will enter the local registrar’s work queue after the funeral home verifies the electronic portion of the record.

2.5.2 DESIGNATING A NON-PARTICIPATING FUNERAL HOME
A medical certifier user may drop a record to paper by designating a non-participating funeral home.

1. After a medical certifier completes at least the mandatory fields required to designate a funeral home and designates a non-participating funeral home (refer to Designate a Funeral Home—2.10), the application will indicate that the user is going to designate a non-participating funeral home and ask the user to verify that they want to drop the record to paper.

2. If the user selects ‘Yes’, the demographic portion of the record will be dropped to paper, and the record will enter the local registrar’s work queue after the medical certifier certifies the electronic portion of the record.

2.5.3 DROP-TO-PAPER AT TIME OF CERTIFICATION

If a medical certifier has not designated a funeral home or has not indicated a hospital disposition on the record by the time of medical certification, the system will assume the user wants to drop the record to paper.

1. After resolving all fields and selecting the Medical Certification option from the Registration drop-down menu on the top toolbar, the Medical Certification screen will appear as shown in Figure 54:

![Figure 54: Medical Certification screen](image)

2. If a funeral home has not been designated and the medical certifier selects the ‘OK’ button after checking the box and entering their PIN, the message in Figure 55 will appear:
3. If the user selects ‘Yes’, the application will let the user continue to certify the record, and the record will drop to paper after the certification process is completed. The pre-populated Death Certificate Worksheet will appear in a separate window.

   a. If the user selects ‘No’, the record can still be certified, but the record will not be dropped to paper and the user can continue to designate a funeral home after returning to the Medical Data Entry screen.

2.6 REFER TO CORONER

A physician’s office may refer the record to a coroner manually or automatically depending on the case. The physician’s office can refer the record to a coroner before or after certification manually. In certain cases, the record will be automatically referred to a coroner after medical certification by a physician if the county coroner requires co-signing on all records or the manner of death is unnatural.

If a medical certifier refers the case to a coroner after certify the record, the coroner has the option to co-sign the record or de-certify the record and change information. If the coroner de-certifies the record, the record will only require the signatures of the coroner and funeral director in order to become registered. If the coroner de-certifies the record after the physician certifies the record, the physician will receive a message that the record has been de-certified.

Refer to Re-Designate a Medical Certifier—2.11 for information on referring a record to a coroner. The physician will select the Registration/Refer to Coroner menu item to refer the record to a coroner, but the functionality is identical to re-designating a record.

   NOTE: A record may be automatically removed from a coroner’s work queue if a funeral home changes certain demographic information after a physician refers the case to a coroner’s office and the coroner’s office has not de-certified the record yet. The following actions will automatically remove the record from the coroner’s work queue, and the record will have to be designated to the physician or referred to a coroner again:
The funeral home changes the county of death
The funeral home changes any of the shared fields
- Decedent First Name
- Decedent Last Name
- Decedent Suffix
- Place of Death
- Date of Death
- Date of Birth

2.7 CERTIFY A DEATH RECORD

A medical certifier may certify a death record after Medical Data Entry is complete. If the medical certifier is completing the entire record, they may certify the death record after all fields are resolved. Before attempting to certify the record, a medical certifier should check to make sure all appropriate fields are resolved (refer to Unresolved Fields List—2.9).

1. After resolving all appropriate fields depending on the type of record, select the Medical Certification option from the Registration drop-down menu on the tope toolbar. The Medical Certification screen will appear as shown in Figure 56:

![Medical Certification screen]

Figure 56: Medical Certification screen

2. The medical certifier should make sure the information on the Medical Certification screen is correct before continuing to certify the record.
a. In order to see a preview of the pre-populated **Death Certificate Worksheet**, press the ‘Preview’ button and the worksheet will load in a separate window.
b. In order to cancel the certification process and return to the record in order to make changes to the record, press the ‘Cancel’ button.

3. Mark the checkbox next to the statement and enter the certifier PIN into the textbox.

4. After marking the checkbox and entering the PIN, click the **OK** button. The message shown in Figure 57 will appear:

![Figure 57: Certification Confirmation Message](image)

5. Click the ‘Yes’ button to confirm certification.
   a. If a funeral home was not designated before certification, a message will appear (refer to [Drop-to-Paper at Time of Certification—2.12.3](#)).

6. If certification is completed successfully, the message shown in Figure 58:

![Figure 58: Successful Certification Message](image)

## 2.8 DE-CERTIFY A DEATH RECORD

Certain scenarios may require a medical certifier to de-certify a record. If a medical facility completes medical certification and identified a hospital disposition on the record, the medical facility may de-certify the record in order to make changes to certain fields before releasing and registering the record.
If a coroner receives a record by referral or automatically, they may de-certify the record in order to make changes to the medical information. Refer to Unique Coroner Roles—2.17 for more information on unique coroner roles.

1. Click the **De-Certify** option from the **Registration** drop-down menu on the top toolbar. The message shown in Figure 59 will appear:

![Figure 59: De-Certification Message](image)

2. Press the ‘Yes’ button and the **De-Certify Record** screen will appear asking the user to enter a comment of up to 150 characters.

![Figure 60: De-Certify Comment screen](image)

3. Enter a comment and press the ‘OK’ button. The message shown in Figure 61 will appear when de-certification is completed successfully:

![Figure 61: De-Certification Successful](image)
The user will need to perform medical certification again before the record can be released.

2.9 DECLINE A RECORD

Declining a record can occur in several different scenarios:

- A funeral home may designate a medical certifier in cases where the funeral home starts the record, and the medical certifier can decline the record.
- The funeral home may designate a medical certifier, the medical certifier may re-designate another medical certifier, and the re-designated medical certifier may decline the record back to the original medical certifier.
- A funeral home or medical facility may refer the record to a coroner, and the coroner may decline the record. This declining process should not be confused with the co-sign decline feature. Refer to Co-Signing Functionality—2.17.3 for more information on Co-Sign Decline functionality.

The application will automatically place the record in the designated location's work queue, and the designated location will receive an email after designation.

If it’s found that the record needs to be declined, the designated location can decline the record back to the facility that designated the medical certifier:

1. Retrieve the record to the Medical Data Entry screen and select the Decline from the Registration drop-down menu on the top toolbar. The message shown in Figure 62 will appear:

![Death Registration](image)

**Figure 62: Decline Message**

2. Click the ‘Yes’ button to continue with declining the record and the Medical Decline screen will appear enabling the user to enter-in a comment of up to 150 characters.
3. Enter a comment detailing why the record needs to be declined and press the ‘OK’ button. The message shown in Figure 64:

![Figure 64: Successful Decline Message](image)

NOTE: If the medical certifier initiated a record, the application will not allow the medical certifier to decline the record.

### 2.10 UNIQUE CORONER ROLES

Several processes and scenarios are unique to county coroner offices. Refer to the sub-sections below for information on de-certifying a record at the coroner office, transferring jurisdiction, and co-signing functionality.

#### 2.10.1 DE-CERTIFYING A RECORD AT A CORONER OFFICE

If a record is referred to a coroner office manually or automatically during the co-signing process, the coroner will have the option to de-certify the record. If the coroner de-certifies the record, they will become the owner of the medical information and be required to certify the record. If the record was referred to the coroner automatically as part of the co-signing process and the coroner de-certifies the record, the co-signing requirement will be eliminated and the coroner will become the sole owner of the medical information. The record will only
require the signature of the coroner in order to be processed further. The de-certification process at the coroner office works the same way as specified in De-Certify a Death Record—2.15.

### 2.10.2 TRANSFERRING JURISDICTION

The coroner office member who received the record that was manually or automatically referred to them may transfer the record to another coroner jurisdiction through an electronic process. If the record needs to be transferred, any county coroner office user with signing rights may choose the **Transfer Jurisdiction** from the drop-down menu after selecting **Registration** on the top toolbar.

1. The message shown in Figure 65 will appear:

   ![Figure 65: Transfer Jurisdiction Confirmation Message](image)

2. Click ‘Yes’ and search and select a participating county coroner using the screen shown in Figure 66:
3. Enter at least one search criteria. Search results will be narrowed and more specific if the user enters as much information as possible. Select a coroner from the grid results.

4. After selecting a participating county coroner, the message shown in Figure 67 will appear:

![Figure 67: Transfer Jurisdiction PIN screen](image)

5. The coroner will be required to mark the checkbox and enter their PIN in the appropriate textbox. After clicking **OK**, the message shown in Figure 68 will appear:
6. After clicking ‘OK’, the **Transfer of Jurisdiction Agreement** will print. Refer to **Printing the Transfer of Jurisdiction Agreement During a Transfer—2.20.1.3** and **Printing the Transfer of Jurisdiction Agreement from the Registered Record Search screen—2.20.2.3** for information on this form.

7. An email notice is sent to the new county coroner. After the user in the new county logs into the application and arrives to the **Medical Data Entry** screen, the message shown in Figure 69 will appear:

![Figure 69: Transfer Jurisdiction Message after Accessing Default Medical Data Entry screen](image)

8. The user in the new county coroner office can press ‘OK’ and then set the unresolved work queue filter to **Pending Acceptance** in order to review the information on the record before accepting or declining the record.

   a. If the user selects the **Decline Transfer** from the Registration drop-down menu on the top toolbar, a notice is sent to the original county with a comment entered by the declining county.

   b. If the user selects the **Accept Transfer** from the Registration drop-down menu on the top toolbar, they are required to enter their PIN and the system logs who accepted the record as well as a date/time stamp. An email notice is sent to the original county/coroner if the transfer is accepted.

Both of the coroner offices will be able to access and print the **Transfer of Jurisdiction Agreement**. The certifier location and certifier information on the record will reflect the second county coroner’s office.
2.10.3 CO-SIGNING FUNCTIONALITY

A coroner may co-sign a record when a record is manually or automatically referred to the coroner office. If the record was manually referred to the coroner office, the coroner may review the information on the record and select the Co-Sign option from the Registration drop-down menu on the top toolbar. This will allow the coroner to review the medical information without having to de-certify the record and re-certify the record.

If a record was automatically referred to the coroner office because of an unnatural manner of death occurred or because the currently elected county coroner always requires co-signing on records, the county coroner will have the option to ‘Co-Sign’ or ‘Decline Co-Sign’. The county coroner can select the record that requires co-signing using the Coroner Review Pending unresolved work queue filter. After retrieving the record, the coroner can select the Co-Sign or Decline Co-Sign from the Registration drop-down menu on the top toolbar. These options will have the following implications:

- **Co-Sign**: The coroner will be required to enter their PIN, and the record will return to the initiating facility where it can be released.
- **Decline Co-Sign**: The coroner will not be required to enter their PIN, and the record will still return to the initiating facility where it can be released. This option allows the county coroner to simply indicate that all medical information is correct and co-signing is not required.

2.11 RELEASE A RECORD

A record will become registered and be assigned an SFN if a medical facility handles a hospital disposition and completes the entire record. If the medical portion of the record is electronic and the medical facility dropped the record to paper, the record will route to the local registrar’s work queue after the medical certifier releases the medical information. The record will not receive an SFN until the demographic information is updated by the state in General Data Entry. Fully electronic records may be released after the medical facility indicates a hospital disposition, all fields are resolved, and the record is certified. The coroner is able to release the record for registration after co-signing. Records that were dropped to paper by the medical facility may be released after the record is medically certified.

In order to release a record:

1. Select ‘Ready for Release’ from the Unresolved Work Queue Filter drop-down menu
2. Then, select the appropriate record from the Unresolved Work Queue.

NOTE: The record will appear in a read-only format.

3. Select the ‘Release’ from the Registration drop-down menu on the top tool-bar. The Release Record screen will appear as shown in Figure 72:

4. Select the Registration/Release menu item. The Release Record screen will appear as shown in Figure 72:
NOTE: The Verification Information will appear blank if the record was dropped to paper. The Verification Information and Certification Information will be the same if there is a hospital disposition (as shown in Figure 72).

5. After reviewing the information on the Release Record screen, select the Release button.

6. The message shown in Figure 73 will appear once the record is released successfully:

2.12 PENDING CAUSE OF DEATH

A record can be registered with a pending cause of death in Colorado, but medical certifiers are still required to update death records if they are marked with a pending cause of death.
In order to update cause of death information, the user is able to select the ‘Pending Cause of Death’ from the Unresolved Work Queue filter. Once the user retrieves the record to the Medical Data Entry screen, the record will appear in a read-only format except for the medical tabs. The medical certifier will be able to update the medical information and release the updated cause of death information by selecting the Release Amended option from the Registration drop-down menu on the top toolbar.

**NOTE:** If a record was manually or automatically referred to a coroner and the cause of death is pending, the coroner has the capability to sign the record with a pending cause of death and make sure the record only appears in a physician’s work queue following registration. The coroner has the same option when starting and certifying the record with a pending cause of death.

In the event that the Medical Certifier does not wish to release the record with the amended cause of death information, the System now accommodates the functionality to save in-progress changes to cause of death information and print an updated death worksheet prior to releasing the record with the amended cause of death information. It is important to note that the worksheet that is printed prior to release will contain the updated medical information, but the date signed will be the date the pending was signed. Should the user need to get the amended date, this is only possible via the registered record search.

In order to do so, simply Save the record following any changes by clicking the Save icon or by navigating to Registration from the top toolbar, then Save at the bottom above Search. This will save the work in-progress to the death worksheet only. Amended versions of certified copies or forms other than the death worksheet will print with the original information until the record is released from the Pending Cause of Death work queue by the medical certifier who completes the amended cause of death information.

In order to certify a record with a pending cause of death and make sure the record only appears in a physician’s work queue following registration, a coroner should mark the File on Behalf of Certifier checkbox in the Certifier Information panel on the Medical-COD tab. In this case, the Type drop-down will only contain a value for ‘Certifying Physician’, and the coroner will be required to search for a participating physician’s office by using the button beside the Name drop-down field.

This functionality is shown in Figure 74, and the Search - Certifier screen is pictured in Figure 75:
Figure 74: Filing on Behalf of Certifier Functionality
Alternatively, the record will remain in the coroner’s ‘Pending Cause of Death’ section within the Work Queue following registration if a coroner does not mark this checkbox, completes the certifier information with their own credentials, and certifies the record.

### 2.13 PRINT FORMS AND LETTERS

#### 2.13.1 PRINTING FORMS DURING MEDICAL DATA ENTRY

A medical certifier may print the following forms after specific fields/processes have been completed during the Medical Data Entry process:

- Death Certificate Worksheet
- File Copy of Death Certificate
- Transfer of Jurisdiction Agreement

#### 2.13.1.1 PRINTING THE DEATH CERTIFICATE WORKSHEET DURING MEDICAL DATA ENTRY

This form may be printed manually after a record is initially saved. The form may be printed up until the record is registered. The form will auto-populate with any information that is
completed on the record. This form may be printed manually by selecting the **Death Certificate Worksheet** option after selecting **Registration** from the top toolbar, and navigating down to **Print**.

This form will also load automatically in a PDF format in a separate window when a record is dropped to paper. The form will auto-populate with all information that was completed before the record was dropped to paper.

### 2.13.1.2 PRINTING THE FILE COPY OF DEATH CERTIFICATE DURING MEDICAL DATA ENTRY

This form may be printed after both demographic and medical portions of the record are completed. This appears in the same format as the *Colorado Death Certificate*, but this form has a “FILE COPY” watermark. All demographic and medical information will auto-populate on this record. This form may be printed manually by selecting the **File Copy of Death Certificate** option after selecting **Registration** from the top toolbar, and navigating down to **Print**.

### 2.13.1.3 PRINTING THE TRANSFER OF JURISDICTION AGREEMENT DURING A TRANSFER

This form will print automatically after a coroner transfers jurisdiction to another coroner. This form is only available to coroner offices. The following information will auto-populate on this form: **Name of Decedent**, **Date/Time of Death**, **Place of Death**, **Death Occurred In**, and **Event Occurred In**.

### 2.13.2 PRINTING FORMS FROM THE REGISTERED RECORD SEARCH SCREEN

A medical certifier with the proper security processes assigned to their account may print the following forms for registered records from the Registered Record Search screen:

- **Authority for Final Disposition** (Coroner acting as a funeral home only)
- **Communicable Disease Letters** (Coroner only)
- **Transfer of Jurisdiction Agreement** (Coroner only)
- **Form to Correct a Colorado Death Certificate**
- **Colorado Death Certificate Request Form**

1. After arriving to the Medical Data Entry screen, the Registered Record Search screen is accessible by selecting the **Registered Record Search** option from the **Registration** drop-down menu on the top toolbar as shown in Figure 76:
2. Enter information about the registered record(s).

**Helpful Hints & Tips**

- Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question; but include other items to reduce the number of matches.
- The **Decedent’s Date of Death** is a mandatory field, unless the user searches for a specific EDR number.
- Along with a name, including the **Decedent’s Date of Death** (which can be entered as a series of 00s followed by a year-i.e.-00/00/2014), **Decedent’s Sex**, and other information will reduce the number of matches that are returned and expedite the search results.
- Choosing the radio-button next to **Soundex** still requires the user to enter at least the **Decedent’s Date of Death**.

3. After entering search parameters, click the **Search** button. Records that match the search criteria will populate the grid on the bottom of the search screen as shown in Figure 77:
Figure 77: Registered Record Search screen Results

4. Highlight the appropriate record in the grid.

5. Click the appropriate button for the corresponding form. If the form applies to the selected record, the form will load in a PDF format in a separate window. Refer to the sub-chapters below to understand these forms in greater detail:

2.13.2.1 PRINTING THE AUTHORITY FOR FINAL DISPOSITION FROM THE REGISTERED RECORD SEARCH SCREEN

Coroners acting as a funeral home are the only medical certifiers allowed to print this form. All information on the Authority for Final Disposition will be auto-populated if this form is printed from the Registered Record Search screen. Once the user has highlighted the desired name, they must simply click the Disposition Permit button and the file will generate in a separate window.

2.13.2.2 PRINTING A COMMUNICABLE DISEASE LETTER FROM THE REGISTERED RECORD SEARCH SCREEN
A coroner can print the appropriate auto-populated **Communicable Disease Letter** for a fully electronic record if an international place of disposition was identified on the record. The appropriate letter will be available on the coroner’s Registered Record Search screen after a funeral home releases and registers the record. Once the user has highlighted the desired name, they must simply click the **Shipment Letter** button and the file will generate in a separate window.

### 2.13.2.3 PRINTING THE TRANSFER OF JURISDICTION AGREEMENT FROM THE REGISTERED RECORD SEARCH SCREEN

The following information will auto-populate on this form if a coroner prints this from the Registered Record Search screen: **Name of Decedent**, **Date/Time of Death**, **Place of Death**, **Death Occurred In**, and **Event Occurred In**. Once the user has highlighted the desired name, they must simply click the **Transfer of Jurisdiction** button and the file will generate in a separate window.

### 2.13.2.4 PRINTING A FORM TO CORRECT A COLORADO DEATH CERTIFICATE FROM THE REGISTERED RECORD SEARCH SCREEN

The following information will be populated on this form if the physician or coroner prints this form from the Registered Record Search screen:

- **Name of Decedent**
- **Date of Death**
- **Place of Death**

This form will not be an editable PDF if printed from the Registered Record Search screen. Once the user has highlighted the desired name, they must simply click the **Correction Form** button and the file will first download to the user’s PC, then it may be opened as a PDF.

### 2.13.2.5 PRINTING A FILE COPY OF A COLORADO DEATH CERTIFICATE

The above functionality enables users to print the certificate’s file copy for 30 days after initial or amended registration. Once the user has highlighted the desired name, they must simply click the **Certificate’s File Copy** button and the file will generate in a separate window.

### 2.13.2.6 PRINTING A COLORADO DEATH CERTIFICATE REQUEST FORM FROM THE REGISTERED RECORD SEARCH SCREEN

The following information will be populated on this form if the physician or coroner prints this form from the Registered Record Search screen:
• Name of Decedent
• Date of Death
• Place of Death

This form will not be an editable PDF if printed from the Registered Record Search screen. Once the user has highlighted the desired name, they must simply click the Application for Certified Copies button and the file will first download to the user’s PC, then it may be opened as a PDF.

2.14 MEDICAL CERTIFIER REPORTS

The following reports are available to medical certifiers with the proper security processes assigned to their account:

• Coroner Case Totals Report
• Coroner Sign Totals Report
• Facility Delinquent Report
• Master List of All Medical Certifiers Report
• Medical Certifier Productivity Report
• Medical Facility Productivity Report
• Pending Cause of Death Listing Report

2.14.1 CORONER CASE TOTALS REPORT

This report displays the total number coroner cases by county of occurrence and manner of death. Each coroner office may only run its own numbers. Physicians will not have access to this report.

In order to run this report:

1. From the Death Home Page, select the Coroner Case Totals Report by navigating to the Reports drop-down menu on the top toolbar and selecting ‘Coroner Case Totals Report’.

Figure 78: Navigating to the Coroner Case Totals Report
2. The Coroner Case Totals Report Input screen will appear.

![Coroner Case Totals Report Input](image)

**Figure 79: Coroner Case Totals Report**

3. Enter a date range by identifying a beginning and ending date range based on the date of death.

4. The report will default to a PDF format. If necessary, change the report format to Excel by selecting the Excel button.

5. Click the Generate button.

6. The report will be generated and the following output parameters will appear:
   - County Name
   - Manner of Death
   - User Name
   - Number of Deaths

7. Additional data will also be generated and imbedded into the report. The additional data is as follows:
   - Report Generated At: (e.g. Date in MM/DD/YYYY, Time in HH:MM, Generated By)
   - Report Criteria: (e.g. Date of Death Range and County Name)
   - Facility Name: (e.g. Ferrell Funeral Home)
     a. If an Excel format was selected, a window will appear and the file will download.

**NOTE:** The downloaded file will be placed in the Downloads folder on your computer’s hard drive; or you may immediately access the file by selecting it at the bottom of the window, such as depicted below:
a. Once the user has selected the file, the file will open. From this point the user may save the file to a more convenient or readily accessible location for future retrieval. Below is a screenshot of a sample Excel report:

![Excel Report Screenshot]

**Figure 81: Sample Excel Report**

b. If a PDF format was selected, the report will load automatically in another window after the user clicks the **Generate** button on the input screen. Below is an example of a PDF report:
2.14.2 CORONER SIGN TOTALS REPORT

This report displays the total number of cases signed or co-signed by anyone designated for that location, regardless of county of occurrence (to include transfers). Physicians will not have access to this report.

In order to run this report:

1. From the Death Home Page, select the Coroner Sign Totals Report by navigating to the Reports drop-down menu on the top toolbar and selecting ‘Coroner Sign Totals Report’.

3. Enter a date range by identifying a beginning and ending date range based on the date of death.

4. The report will default to a PDF format. If necessary, change the report format to Excel by selecting the Excel button.

5. Click the Generate button.

6. The report will be generated and the following output parameters will appear:
   - County Name
   - Staff Name Generating Report
   - Number of deaths signed (their county)
   - Number of deaths co-signed (their county)
   - Number of deaths signed (transfer)
   - Number of deaths co-signed (transfer)

7. Additional data will also be generated and imbedded into the report. The additional data is as follows:
   - Report Generated At: (e.g. Date in MM/DD/YYYY, Time in HH:MM, Generated By)
   - Report Criteria: (e.g. Date of Death Range and County Name)
   - Facility Name: (e.g. Ferrell Funeral Home)

b. If an Excel format was selected, a window will appear and the file will download.

   NOTE: The downloaded file will be placed in the Downloads folder on your computer's hard drive; or you may immediately access the file by selecting it at the bottom of the window, such as depicted below:
c. Once the user has selected the file, the file will open. From this point the user may save the file to a more convenient or readily accessible location for future retrieval. Below is a screenshot of a sample Excel report:

![Figure 85: Sample Excel Report](image)

```
<table>
<thead>
<tr>
<th>County Name</th>
<th>Number of Deaths Signed</th>
<th>Number of Deaths Co-Signed</th>
<th>Number of Deaths Signed (Transferred)</th>
<th>Number of Deaths Co-Signed (Transferred)</th>
</tr>
</thead>
<tbody>
<tr>
<td>JEFFERSON</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
```

d. If a PDF format was selected, the report will load automatically in another window after the user clicks the Generate button on the input screen. Below is an example of a PDF report:

![Figure 86: Sample PDF Report](image)
This report provides information regarding the status of death records within the Colorado EDRS. The report will only include records owned by that particular facility, and this report will not include registered records.

In order to run this report:

8. From the Death Home Page, select the Reports/Reports/Facility Delinquent Report menu item.


10. Enter a date range by identifying a beginning and ending date range based on the date the record was created.

11. If desired, select one of the following statuses from the “Record Status” dropdown field:

   • Pending
   • Dropped-to-Paper
   • Complete but Not Yet Registered
   • Registered

This report provides information regarding the status of death records within the Colorado EDRS. The report will only include records owned by that particular facility, and this report will not include registered records.

In order to run this report:

2. From the Death Home Page, select the ‘Facility Delinquent Report (Uncertified)’ option by navigating to the top-toolbar and selecting Reports, then Reports (again), then Facility Delinquent Report (Uncertified).
3. The Facility Delinquent Report (Uncertified) screen will appear:

![Facility Delinquent Report (Uncertified) Screen]

Figure 88: Facility Delinquent Report (Uncertified) Screen

4. Enter a date range by identifying a beginning and ending date range based on the date the record was created.

5. If desired, select one of the radio buttons indicating a specific record status from the Record Status section:

   - Pending
   - Dropped-to-Paper
   - Complete but Not Yet Registered
   - Pending Cause of Death

6. The report will default to a PDF format. If necessary, change the report format to Excel by selecting the Excel radio button.
7. Click the **Generate** button.

8. The report will be generated and the following output parameters will appear:

- County Name
- Facility Name
- EDR number (non-registered)
- Decedent Name
- Date of Death
- Date of Record’s Last Update
  - Record Status
    - Pending
    - Dropped-to-Paper
    - Complete but Not Yet Registered
    - Registered
    - Pending Cause of Death
- Record Creator User ID

9. Additional data will also be generated and imbedded into the report. The additional data is as follows:

- Report Generated At: (e.g. Date in MM/DD/YYYY, Time in HH:MM, Generated By)
- Report Criteria: (e.g. Date of Death Range and County Name)
- Facility Name: (e.g. Ferrell Funeral Home)

  a. If an Excel format was selected, a window will appear and the file will download.

**NOTE:** The downloaded file will be placed in the **Downloads** folder on your computer’s hard drive; or you may immediately access the file by selecting it at the bottom of the window, such as depicted below:

![Figure 89: Downloaded Excel File](image-url)
b. Once the user has selected the file, the file will open. From this point the user may save the file to a more convenient or readily accessible location for future retrieval. Below is a screenshot of a sample Excel report:

![Sample Excel Facility Delinquent Report (Uncertified)](image)

Figure 90: Sample Excel Facility Delinquent Report (Uncertified)

c. If a PDF format was selected, the report will load automatically in another window after the user clicks the **Generate** button on the input screen.

**2.14.4 MASTER LIST OF ALL MEDICAL CERTIFIERS**

This report displays all active users with the medical certification permission, alphabetically by last name.

In order to run this report:

1. From the Death Home Page, select the **Master List of All Medical Certifiers Report** option by navigating to the top-toolbar and selecting **Reports**, then **Reports** (again), then **Master List of All Medical Certifiers Report**.
The Master List of All Medical Certifiers Report Input screen will appear.

The report will default to a PDF format. If necessary, change the report format to Excel by selecting the Excel button.

Click the Generate button.

The report will be generated and the following output parameters will appear:
- Physician or Coroner Last Name (Last, First, Middle [if available])
- Name of Facility(ies) assigned (if available)
- Address

a. If an Excel format was selected, a window will appear and the file will download.

**NOTE:** The downloaded file will be placed in the Downloads folder on your computer’s hard drive; or you may immediately access the file by selecting it at the bottom of the window, such as depicted below:

![Figure 94: Downloaded Excel File](image)

b. Once the user has selected the file, the file will open. From this point the user may save the file to a more convenient or readily accessible location for future retrieval. Below is a screenshot of a sample Excel report:
c. If a PDF format was selected, the report will load automatically in another window after the user clicks the **Generate** button on the input screen. Below is an example of a PDF report:

![Figure 96: PDF Report Example](image_url)
2.14.5 MEDICAL CERTIFIER PRODUCTIVITY REPORT

This report provides productivity information for a certain user. Medical facility/coroner office staff can only run reports on for their cases only.

In order to run this report:

1. From the Death Home Page, select the Medical Certifier Productivity Report option by navigating to the top-toolbar and selecting Reports, then Reports (again), then Productivity Reports, and then Medical Certifier Productivity Report.

![Medical Certifier Productivity Report Navigation](image)

3. Enter a date range by identifying a beginning and ending date range based on the date of
death.

4. The User ID field will default to blank. The user may select an individual user from the
dropdown if desired. Otherwise, the report will run for all users at that location.

5. The report will default to a PDF format. If necessary, change the report format to Excel by
selecting the Excel button.

6. Click the Generate button.

7. The report will be generated and the following output parameters will appear:
   
   - Date of Death
   - Place of Death
   - Cause of Death
   - Date Signed
   - Certifier Name

   a. If an Excel format was selected, a window will appear and the file will download.

   NOTE: The downloaded file will be placed in the Downloads folder on your
   computer’s hard drive; or you may immediately access the file by selecting it at the
   bottom of the window, such as depicted below:
b. Once the user has selected the file, the file will open. From this point the user may save the file to a more convenient or readily accessible location for future retrieval.

c. If a PDF format was selected, the report will load automatically in another window after the user clicks the Generate button on the input screen.

2.14.6 MEDICAL FACILITY PRODUCTIVITY REPORT

This report provides productivity information for a certain user at a medical facility.

In order to run this report:

1. From the Death Home Page, select the Reports/Reports/Productivity Reports/Medical Facility Productivity Report menu item.
Figure 100: Medical Facility Productivity Report Navigation

2. The **Medical Facility Productivity Report** screen will appear.

3. Enter a date range by identifying a beginning and ending date range based on the date of death.

4. The User ID field will default to blank. The user may select an individual user from the dropdown if desired. Otherwise, the report will run for all users at that location.

5. The report will default to a PDF format. If necessary, change the report format to Excel by selecting the **Excel** button.

6. Click the **Generate** button.

7. The report will be generated and the following output parameters will appear:
   - Date of Death
   - Date of Birth
   - Cause of Death
   - Certifier Name

   d. If an Excel format was selected, a window will appear and the file will download.
NOTE: The downloaded file will be placed in the Downloads folder on your computer's hard drive; or you may immediately access the file by selecting it at the bottom of the window, such as depicted below:

Figure 101: Excel Download File

e. Once the user has selected the file, the file will open. From this point the user may save the file to a more convenient or readily accessible location for future retrieval.

f. If a PDF format was selected, the report will load automatically in another window after the user clicks the Generate button on the input screen.

2.14.7 PENDING CAUSE OF DEATH LISTING REPORT

This report provides a list of registered death records with a pending cause of death. This report will only include records owned by the funeral home user’s location.

In order to run this report:

1. From the Death Home Page, select the ‘Pending Cause of Death Listing Report’ option by navigating to the top-toolbar and selecting Reports, then Reports (again), then Pending Cause of Death Listing Report.
1. The **Pending Cause of Death Listing Report** screen will appear.

2. Enter a date range by identifying a beginning and ending date range based on the date of death.

3. The report will default to a PDF format. If necessary, change the report format to Excel by selecting the **Excel** button.

4. Click the **Generate** button.

5. The report will be generated and the following output parameters will appear:
   - County Name
   - Facility Name
   - State File/EDR Number
• Decedent Name
• Date of Death
• Date of Record’s Last Update
• Record Status
• User ID

6. Additional data will also be generated and imbedded into the report. The additional data is as follows:

• Report Generated At: (e.g. Date in MM/DD/YYYY, Time in HH:MM, Generated By)
• Report Criteria: (e.g. Date of Death Range)
• Facility Name: (e.g. Ferrell Funeral Home)

g. If an Excel format was selected, a window will appear and the file will download.

   NOTE: The downloaded file will be placed in the Downloads folder on your computer’s hard drive; or you may immediately access the file by selecting it at the bottom of the window, such as depicted below:

   ![Figure 104: Pending Cause of Death Listing Report Excel Download File](image)

h. Once the user has selected the file, the file will open. From this point the user may save the file to a more convenient or readily accessible location for future retrieval. Below is a screenshot of a sample Excel report:
i. If a PDF format was selected, the report will load automatically in another window after the user clicks the Generate button on the input screen. Below is an example of a PDF report: