DAVE™

Database Application for Vital Events

A ChoicePoint® Product

Oregon
Medical Examiner
User's Guide

December 2006

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Introduction

Welcome to the DAVE™ Training and User Guide

VitalChek's **DAVE™** application is a sophisticated, electronic vital record management system. The **DAVE™** gui (graphical user interface – pronounced 'gooey') uses familiar web structures and techniques to open, close, and navigate through the application. Within the infrastructure of the **DAVE™** application there are powerful 'engines' that are used to search, validate, and set status codes used to monitor the quality and completeness of vital records data.

This guide will lead the user through all of the **DAVE™** pages and provide step-by-step details on how to perform individual tasks. Each step is accompanied by screen prints that highlight and summarize the important information discussed in the steps. You will find an extensive table of contents at the beginning of this manual and an appendix of important definitions and useful information at the end of this manual.

Web Browsers

DAVE™ is a thin client application utilizing state of the art features found in current versions of Microsoft's Internet Explorer (IE) web-browser. Therefore, client use of the most current version of IE is a requirement.

Web Back Button

The Back button on the IE web browser tool bar should generally be **avoided** when working in the **DAVE™** application. However, one acceptable use of the IE's Back button is to return to the Search Results page after viewing a possible match. The use of your IE's back button in other capacities may result in the loss of data.

Where the functionality is supported, **DAVE™** provides a button or similar feature that can be used to return to a previously viewed page.

As a rule, you should not use Internet Explorer's 'Back' button while working in the DAVE™ application. Use the page specific 'Back', 'Return', or 'Cancel' buttons instead.

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General System Navigation

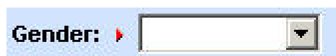
Page Controls and Navigation

The **DAVE™** system contains many controls that are familiar to most PC users. Additionally, the **DAVE™** system includes some custom controls created by VitalChek to simplify the job of entering and processing vital records data.

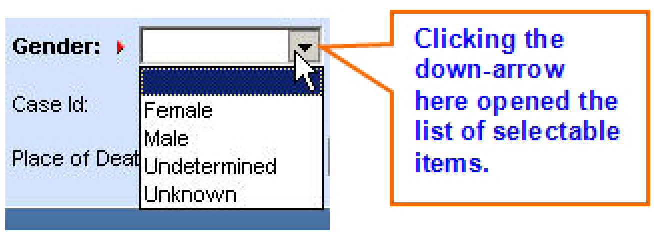
Dropdown Lists

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

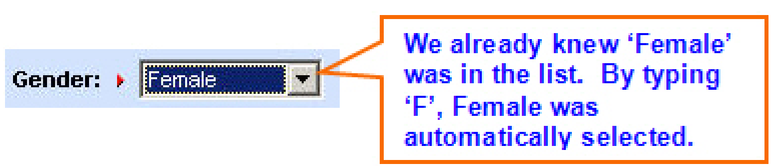
One of the first dropdown lists you are likely to encounter is the **Gender** dropdown list on the main **Start/Edit New Case** page. To view all items in the list simply click on the down-arrow on the right side of the control.



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



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



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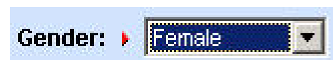
If more than one word in the list starts with the same letter, typing that letter again will scroll through the list for you. For example, typing 'U' in this example would display 'Undetermined'. Typing it again will display 'Unknown'.

Once the list is highlighted, it is possible to navigate up and down through the list using the directional arrow keys on your keyboard.

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

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

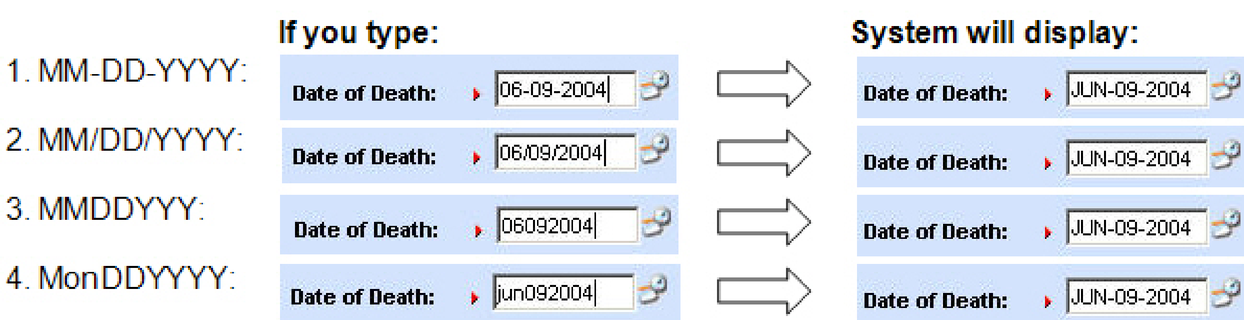
Pressing the up-arrow with 'Male' highlighted scrolls back up the list to 'Female'.



Additionally, once a dropdown list has been selected, using the Alt-DownArrow key combination on your keyboard will open the list. Using Alt-UpArrow will close the list.

Standard Date Format

While processing vital records, you will frequently find yourself inputting dates. **DAVE™** allows you much flexibility in using several different date formats:



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

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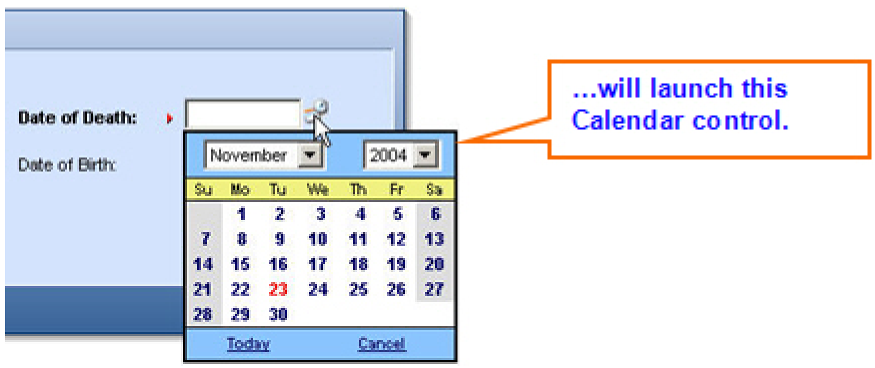
Calendars Controls

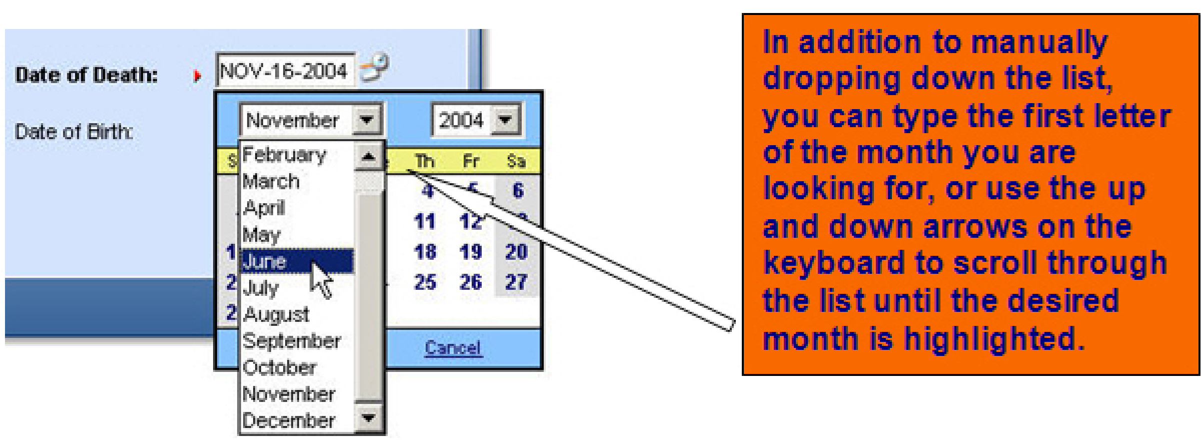
As noted above, dates must be keyed into the **DAVE™** system using one of 4 specific formats. However, **DAVE™** also includes a custom date control that simplifies the process of entering dates.

Anywhere you see a date entry control, you will also see the **Calendar Icon**: .

In addition to manual date entry, you can also select the **Calendar Icon** next to a date entry box to bring up a **Calendar control**.



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



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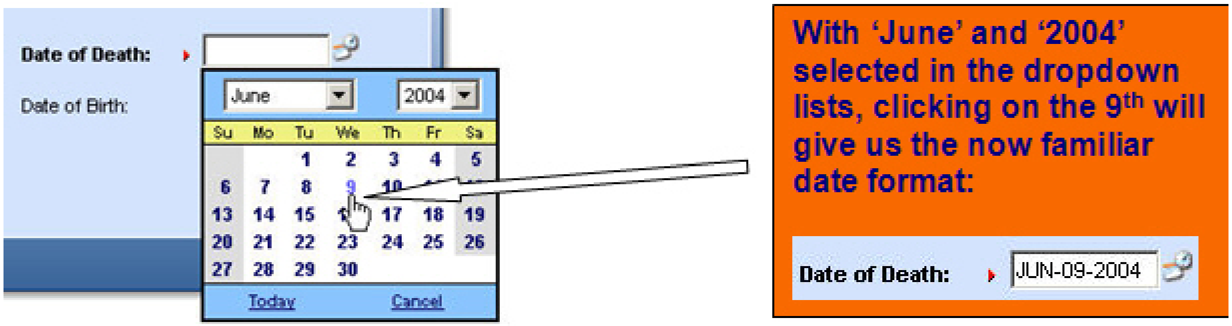
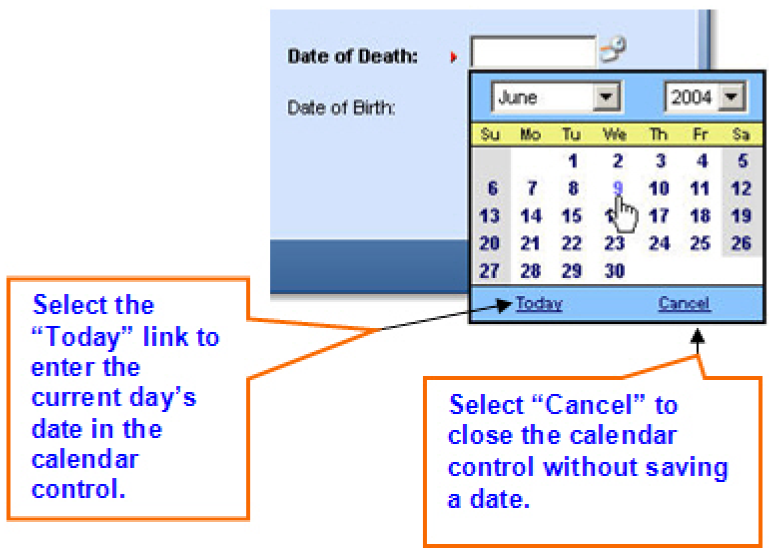
Once we have selected the correct Month and Year, clicking on the Day of the month will auto-populate the Date for us.



Also, clicking on the **Today** link on the calendar control will automatically enter the current date into the calendar control. Selecting **Cancel** will close the control without saving a date.



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

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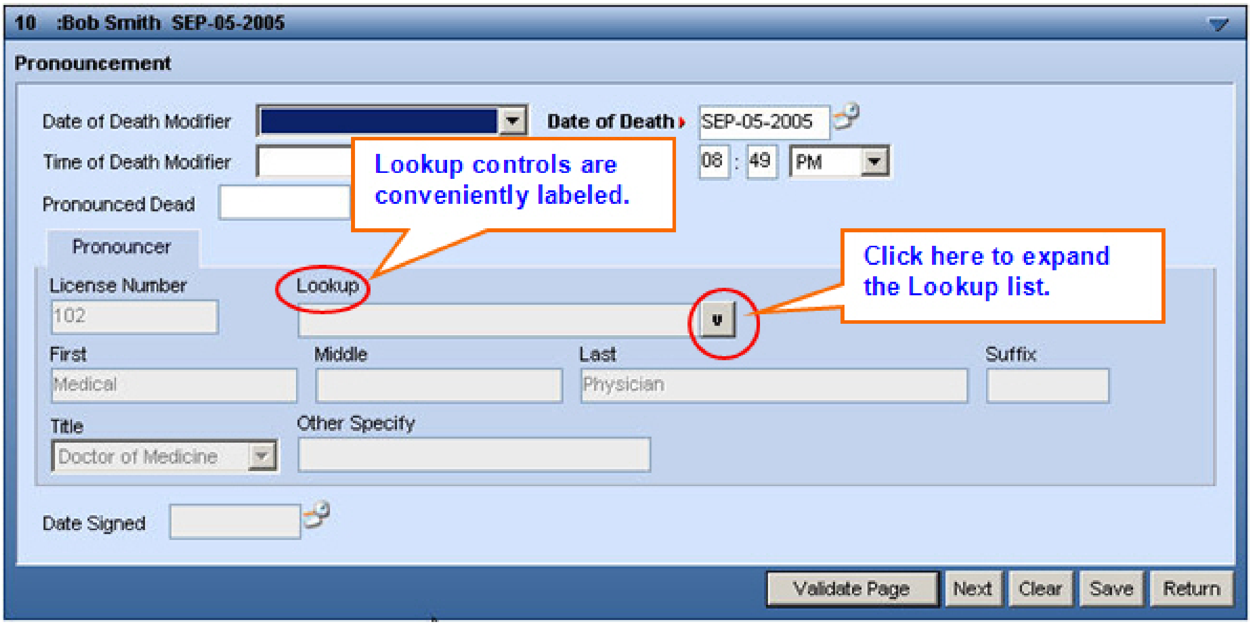
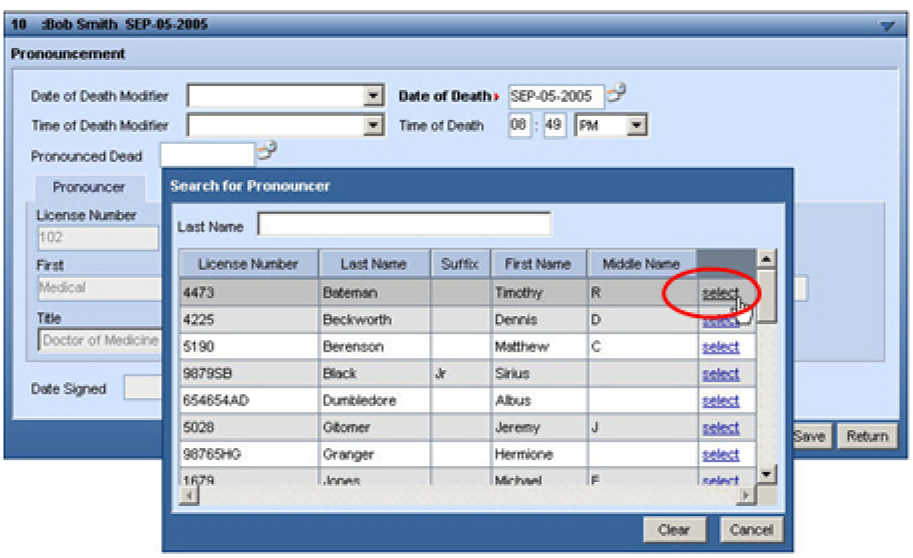
Lookup Controls and Auto Populate

Lookup Controls are **DAVE™** specific controls. **Lookup Controls** are like expanded dropdown lists that display a grid of selectable data. **Lookup Controls** are all labeled, so you will know one when you see it.

Similar to dropdown lists, click on the **Lookup** ( ) button on the right end of the control.



Once the **Lookup** control has been expanded, just click on any entry's **Select** link to fill in the control.



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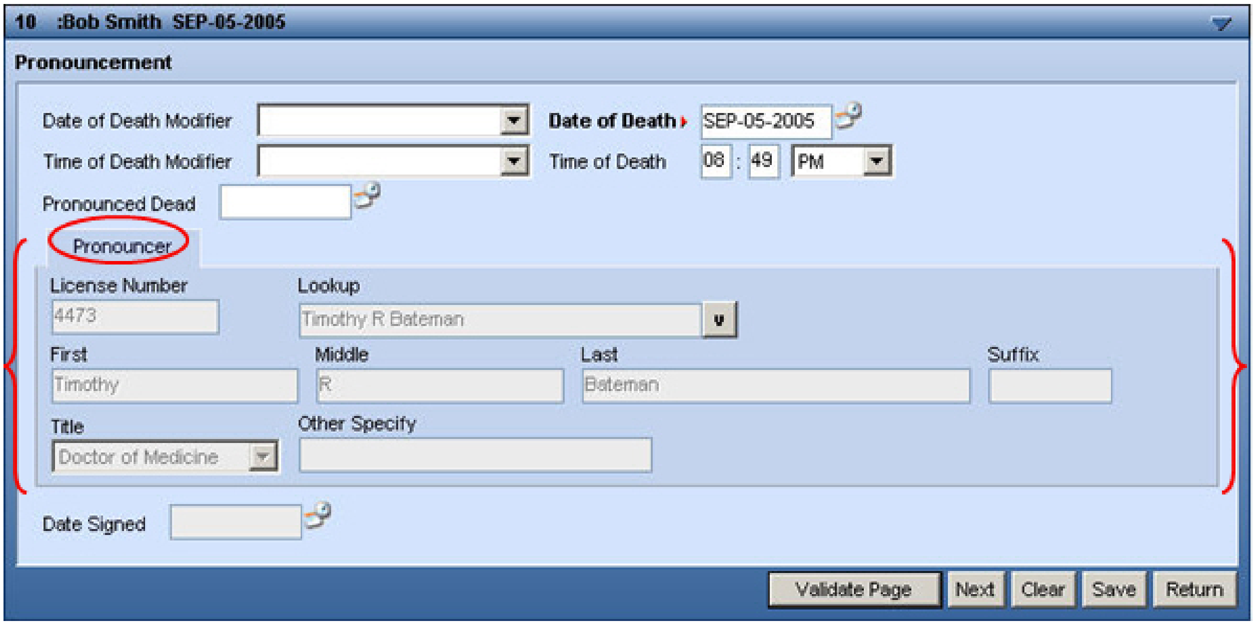
Notice that all of the controls on the **Pronouncer** tab have now been auto-filled.



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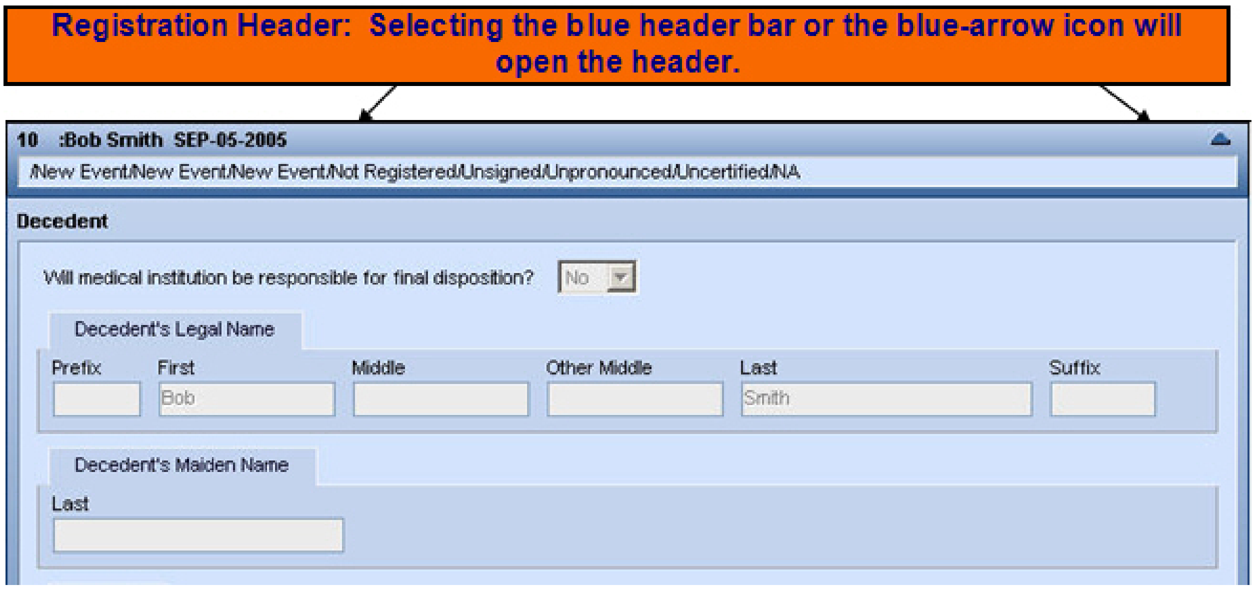
The Registration Header

The **Registration Header** helps you keep track of missing data that can prevent a death record from being properly registered. It is also a valuable tool for tracking the status of a death case.

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



Clicking on this bar or the darker blue arrow at the upper right corner will expand the header and reveal the statuses associated with this particular record.

The **DAVE™** application provides work flow and data quality management through the assignment of statuses. The death registration process involves many steps that are completed by several parties. In order to track these steps the **DAVE™** system assigns one or more statuses to the record when an action is performed (e.g. Select the register button) or event occurs (e.g. validation rule failure).

The initial status assigned to a new electronic case is **New Event/New Event/ New Event/ Not Registered/Unsigned/Uncertified/Unpronounced/NA**. (The status shown in the example above.)

The initial status of a paper record keyed by a registration office user is **New Event/New Event/ New Event/ Not Registered/NA/NA/NA/NA**. The goal of all parties in the registration process is to obtain a 'perfect' status. A perfect status would indicate the highest data quality and completion of all steps in the registration process (e.g., Personal Valid/Fact of Death Valid/Medical Valid/Registered).

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Sometimes a death record may contain values which are valid, however, those values cause soft edit rule failures. Therefore, it is also possible to have a registered record have a Personal Valid with exceptions /Fact of Death valid with exceptions/Medical Valid with exceptions /Registered status or any combination of valid and valid with exceptions.

Selecting either the **Registration Header** or the blue arrow a second time will close the header.

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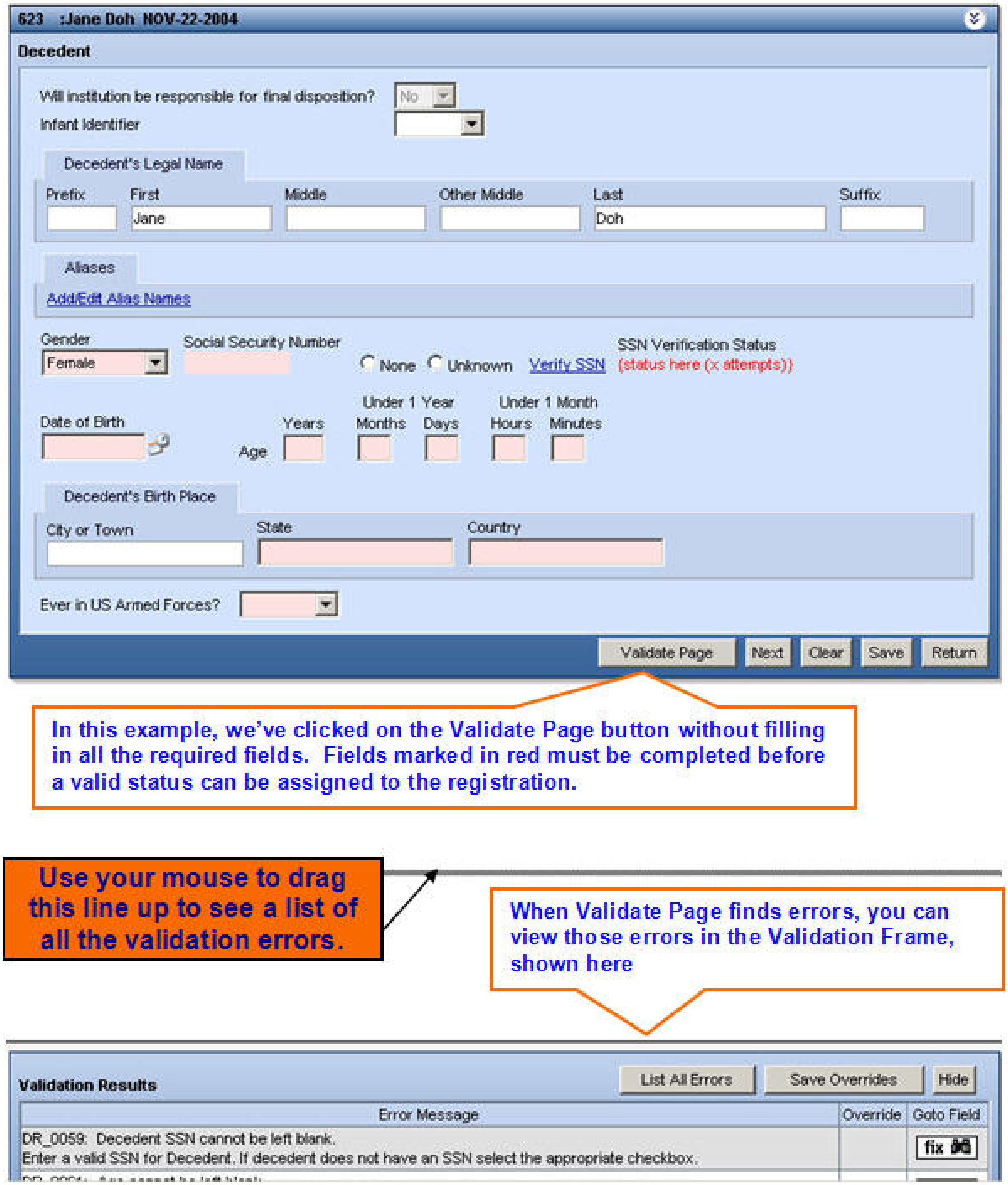
Validate Page and the Validation Frame

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



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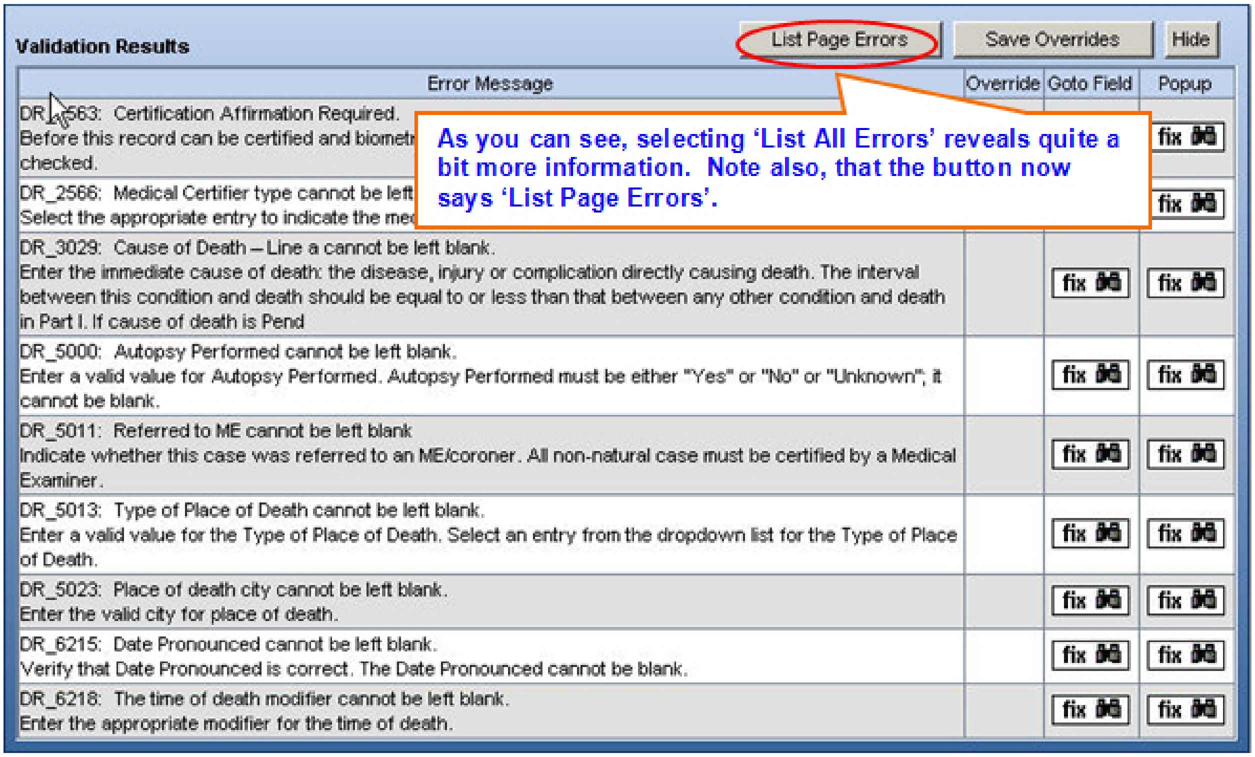
When you select the **Validate Page** button, the **Validation Frame** will list all of the errors associated with that page. If you then select the **List All Errors** button the system will display all errors associated with the entire death case.



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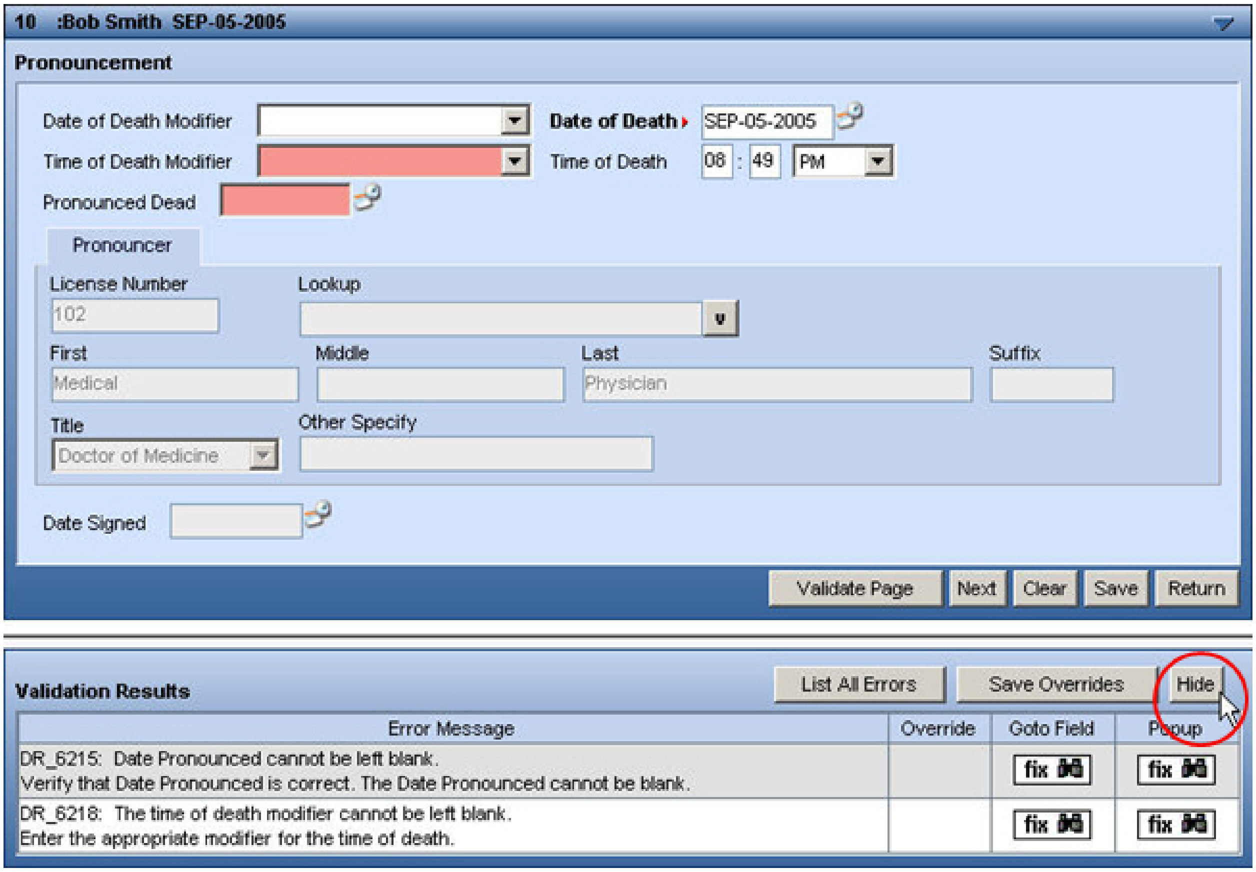
Notice that the **List All Errors** button has now become the **List Page Errors** buttons. Clicking this button will reduce the list to those errors associated only with the currently displayed page.

To hide the displayed list of errors, click on the **Hide** button. Re-click on the **Validate Page** button to view the errors again.



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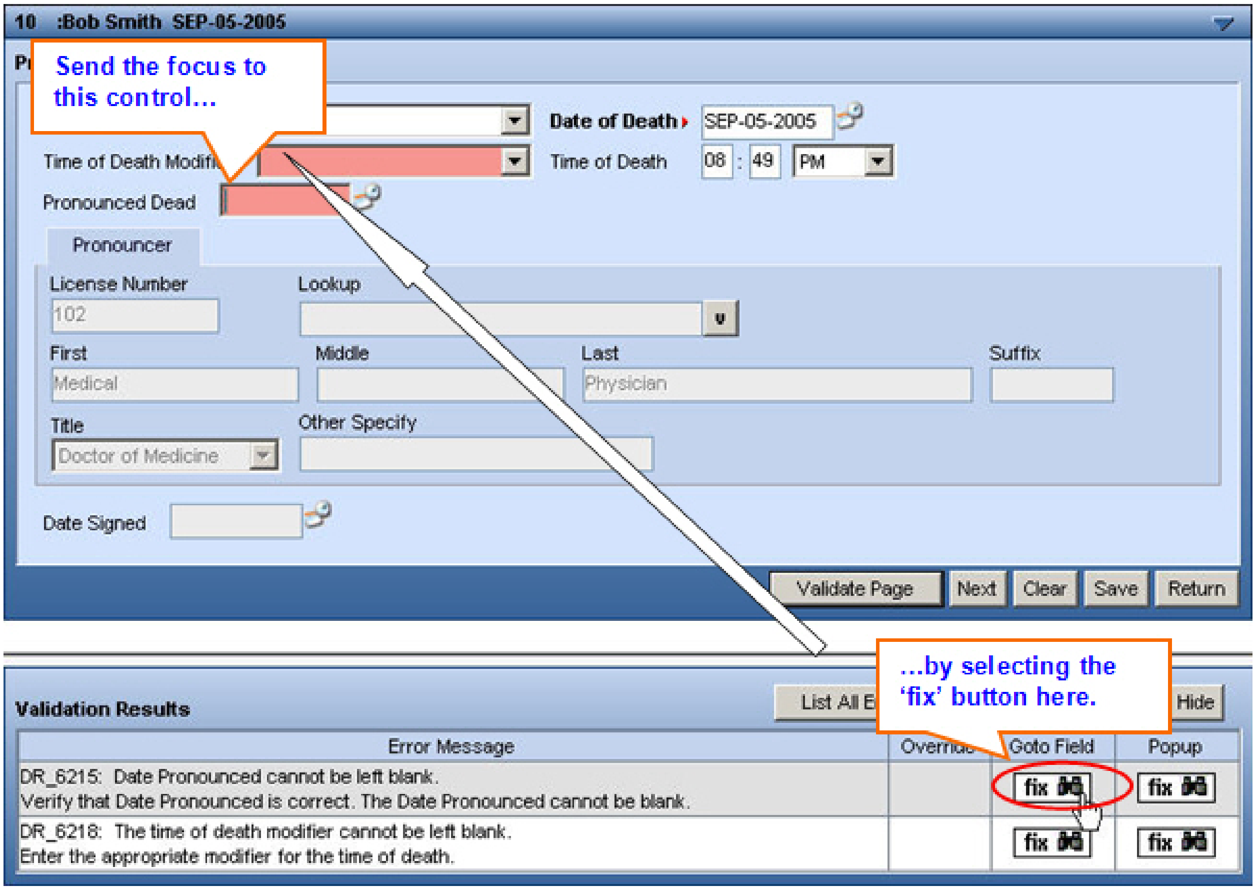
To fix an error, click on the fix button in the **Goto Field** column. This will place the cursor or focus in the field that needs to be corrected. Use this option if you are on a page with many errors to correct.



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

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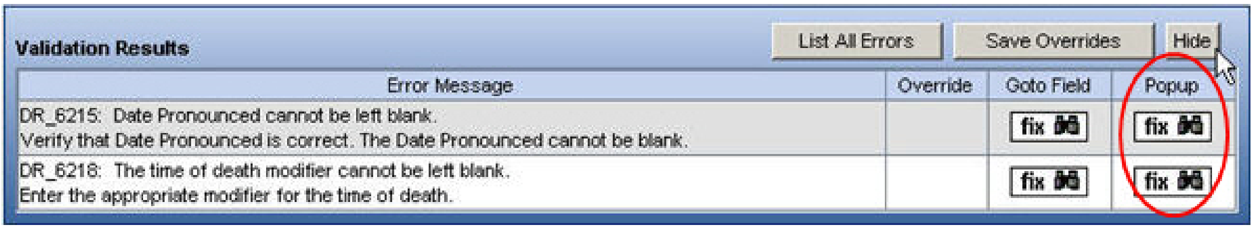
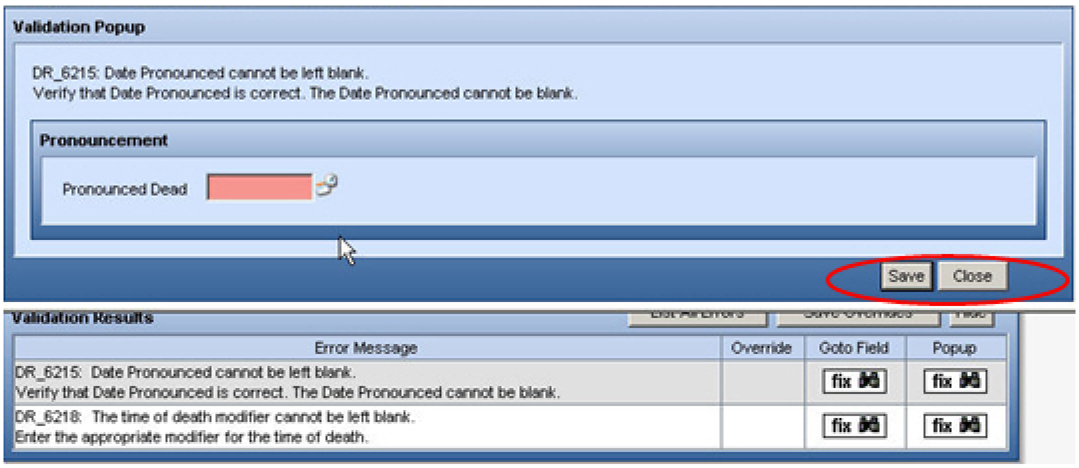
Another method of correcting mistakes is to click on the button in the **Popup** column…

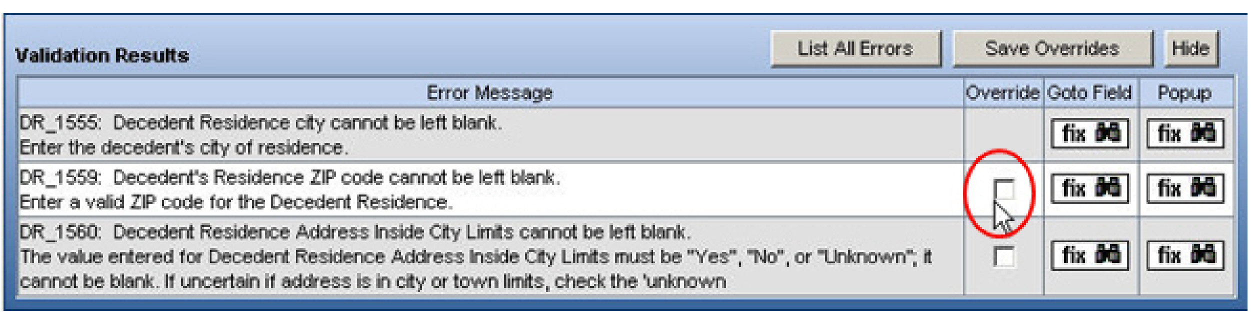


…to launch a popup window containing the error to be corrected:



Correct the error and click the **Save** button to submit your changes. The popup will close and your changes entered on the page beneath. Click the **Close** button if you want to close the popup without making any changes.

Sometimes, a death registration can be processed even with certain errors present in the registration. In those cases, a checkbox will be provided in the **Override** column.



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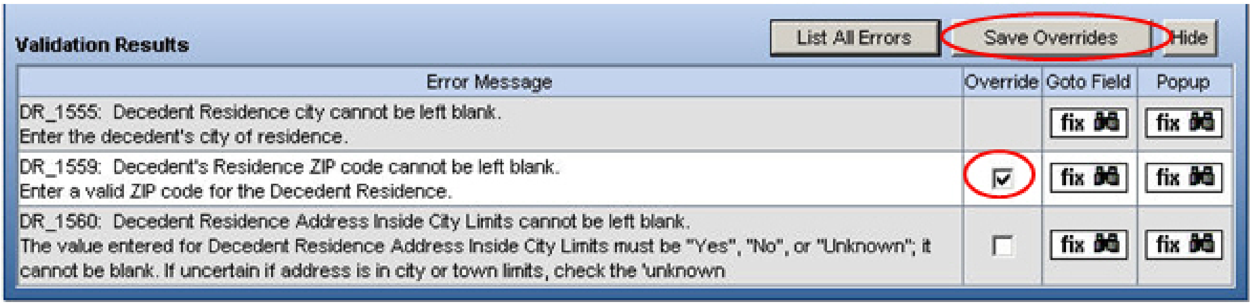
Place a checkmark (☑) in the **Override** box and click the **Save Overrides** button. This allows you to process a death registration even if some errors are present.



Important Note: Not all errors can be overridden!

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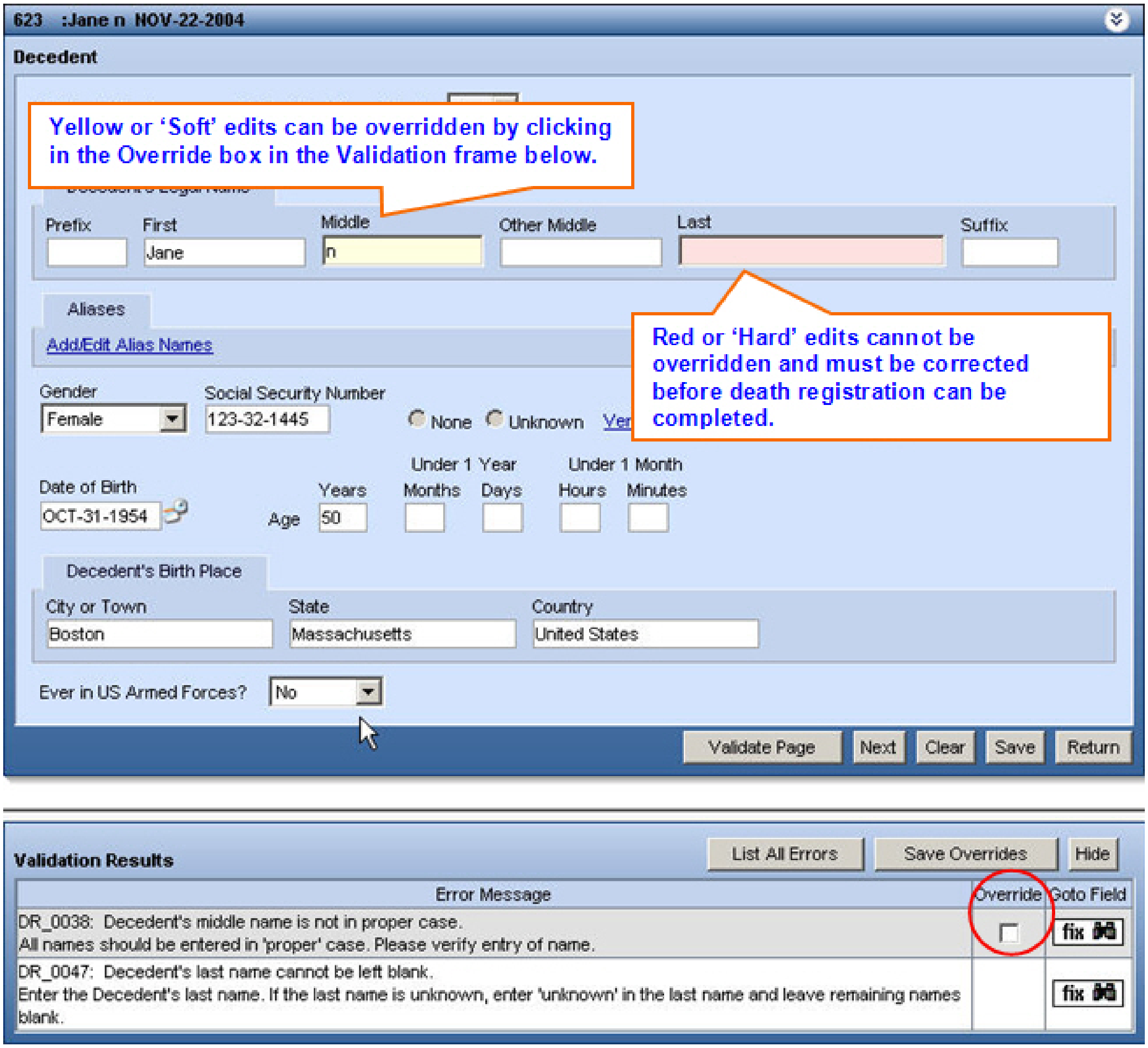
There are two types of errors in **DAVE™**: (1) Hard and (2) Soft. Hard edits are highlighted onscreen in red. Soft edits are highlighted in yellow. In the example below we have used a lower-case 'n' for middle initial and left out the last name entirely.



Notice that the **Last** name textbox is highlighted in red. Death registration will not be allowed until this error is fixed.

Middle initial is highlighted in yellow. By using the **Override** feature you can accept a lower case 'n' for middle initial and still process a death registration.

You may have noticed that certain pages on the Death Registration Menu are marked with either a red, yellow or green arrow.

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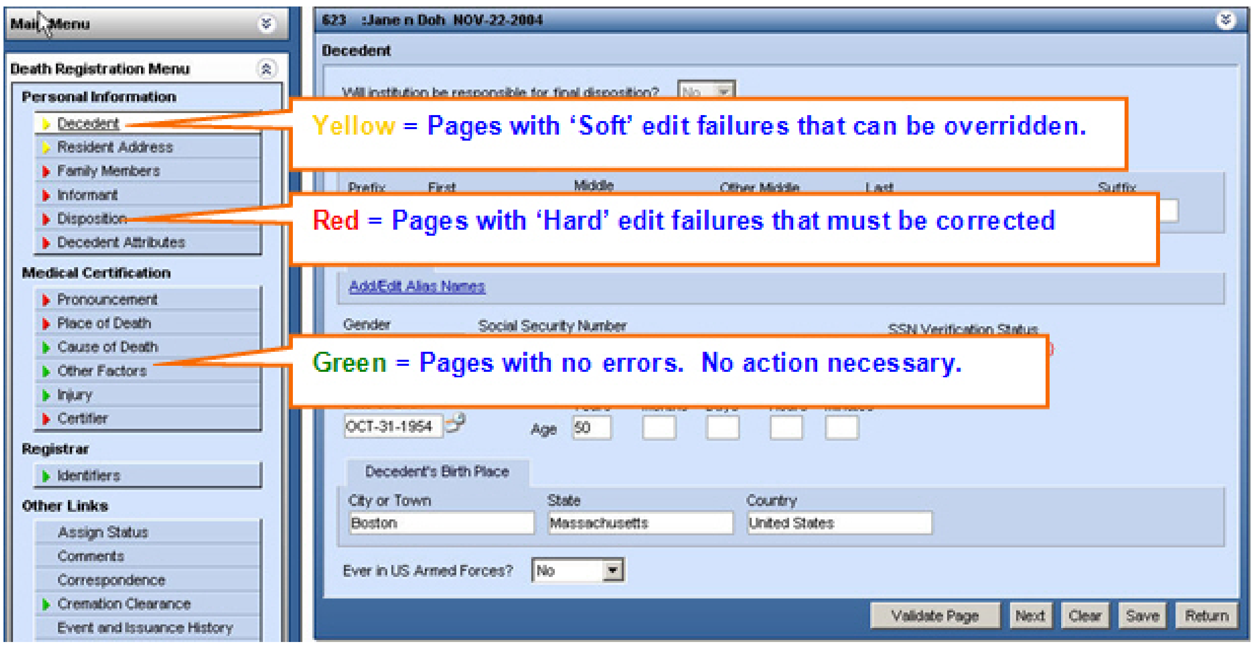
These arrows are your indication as to which pages contain errors and which pages are complete.

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

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

Pages marked with a green arrow contain no errors.



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

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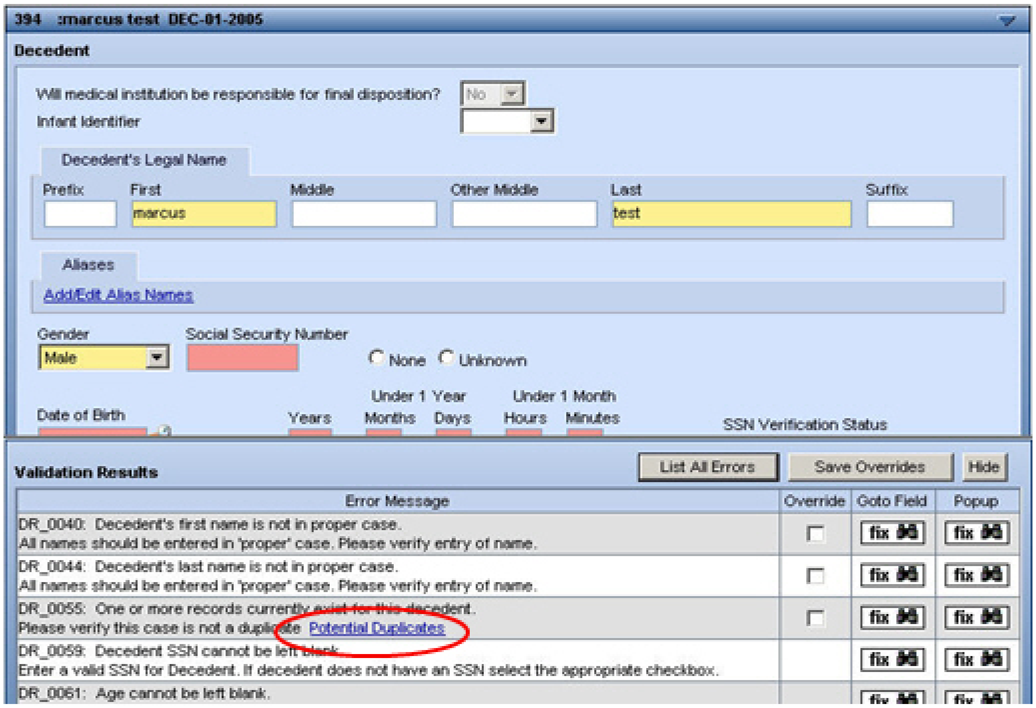
Potential Duplicates

When the **Validation** button is activated from any of the **Death Registration Menu** pages, the **DAVE™** system runs a search for potential duplicate records. This is done to prevent the creation of duplicate death registrations.



If **DAVE™** finds potential duplicates, an error message will appear in the **Validation Results** frame containing the following message and link:

"DR_0055: One or more records currently exist for this decedent. Please verify this case is not a duplicate. Potential Duplicates"

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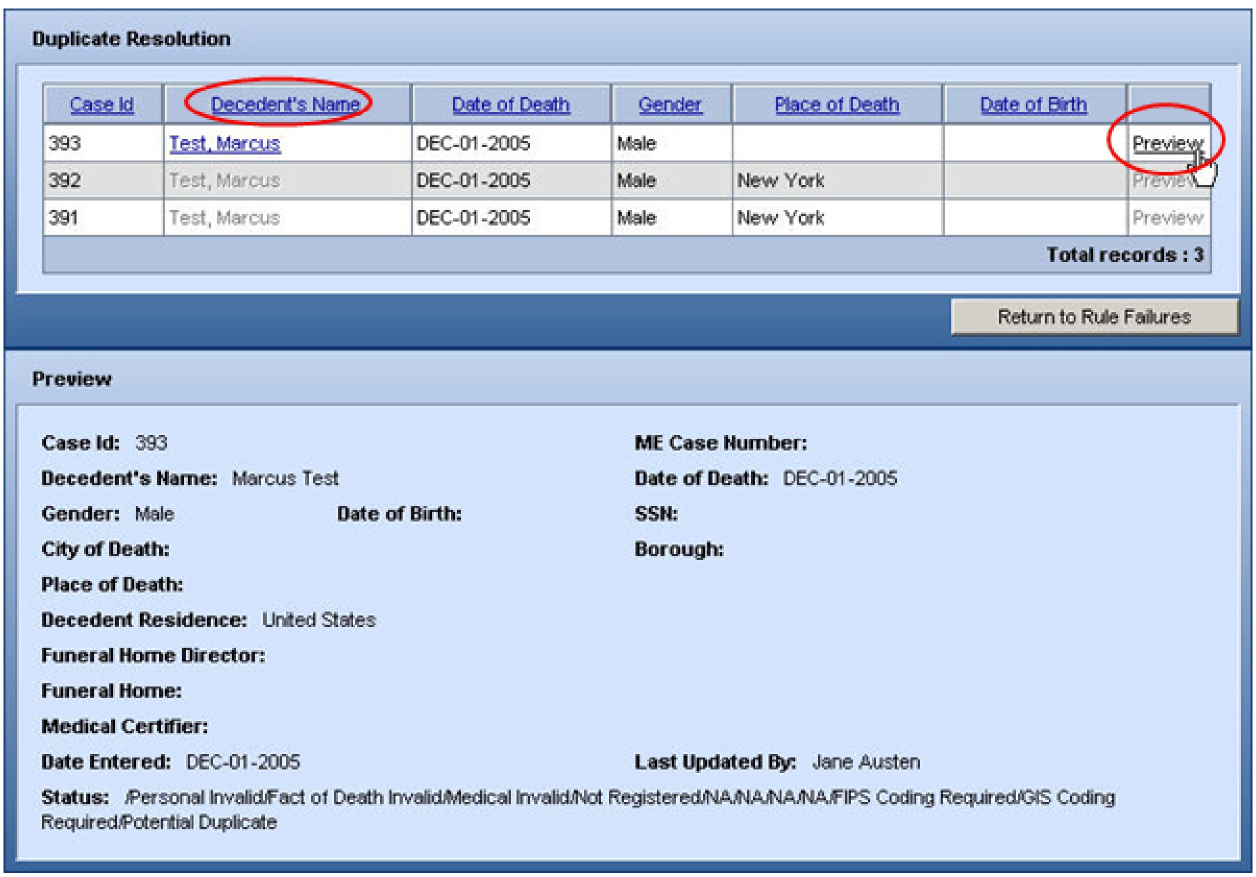
Click on the **Potential Duplicates** link to open the **Duplicate Resolution** page. This page lists all of the records in the **DAVE™** database that have been identified as potential duplicates. Notice that not all of the records are accessible. Access to the records in the **DAVE™** database is based on the user's security profile.

Duplicate Resolution

Case Id	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
393	Test, Marcus	DEC-01-2005	Male			Preview
392	Test, Marcus	DEC-01-2005	Male	New York		Preview
391	Test, Marcus	DEC-01-2005	Male	New York		Preview
						Total records : 3

Return to Rule Failures

Click on the **Preview** link to open a **Preview** window. This will display a summary of the record to help you determine whether or not the record you are currently working on is, in fact, a duplicate record. If the **Preview** window does not provide enough information, then click on the **Decedent's Name** link to open the actual record.



Duplicate Resolution

Case Id	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
393	Test, Marcus	DEC-01-2005	Male			Preview
392	Test, Marcus	DEC-01-2005	Male	New York		Preview
391	Test, Marcus	DEC-01-2005	Male	New York		Preview
						Total records : 3

Return to Rule Failures

Preview

Case Id: 393
ME Case Number:
Decedent's Name: Marcus Test
Date of Death: DEC-01-2005
Gender: Male **Date of Birth:**
SSN:
City of Death:
Borough:
Place of Death:
Decedent Residence: United States
Funeral Home Director:
Funeral Home:
Medical Certifier:
Date Entered: DEC-01-2005
Last Updated By: Jane Austen
Status: /Personal Invalid/Fact of Death Invalid/Medical Invalid/Not Registered/NA/NA/NA/NA/FIPS Coding Required/GIS Coding Required/Potential Duplicate

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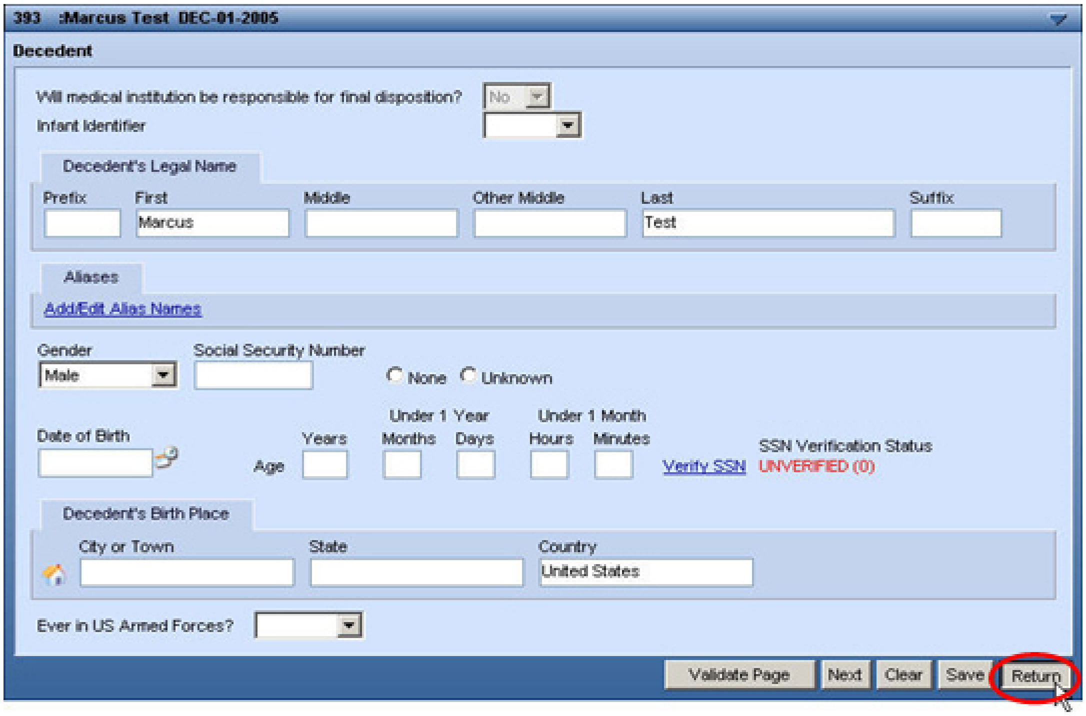
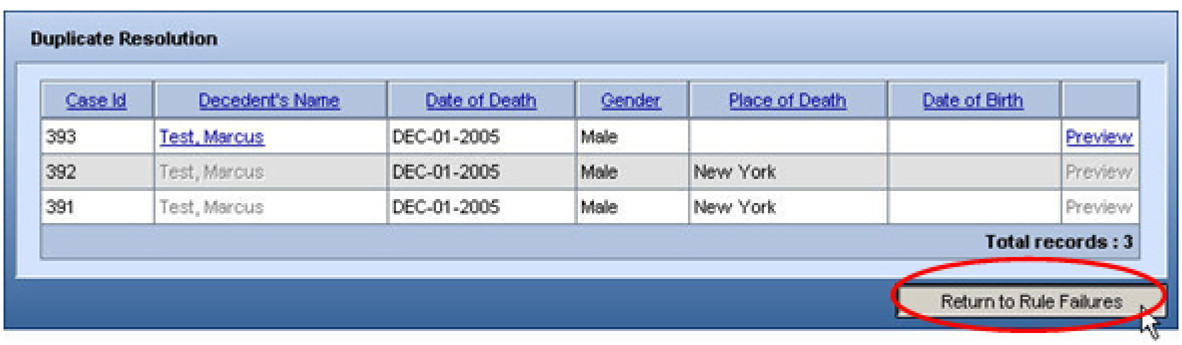
When you have finished looking over the opened record, click the **Return** link at the bottom of the page to return to the **Duplicate Resolution** window



If you are certain that the record you are working on is not a duplicate, then select the **Return to Rule Failures** button to return to the new record.



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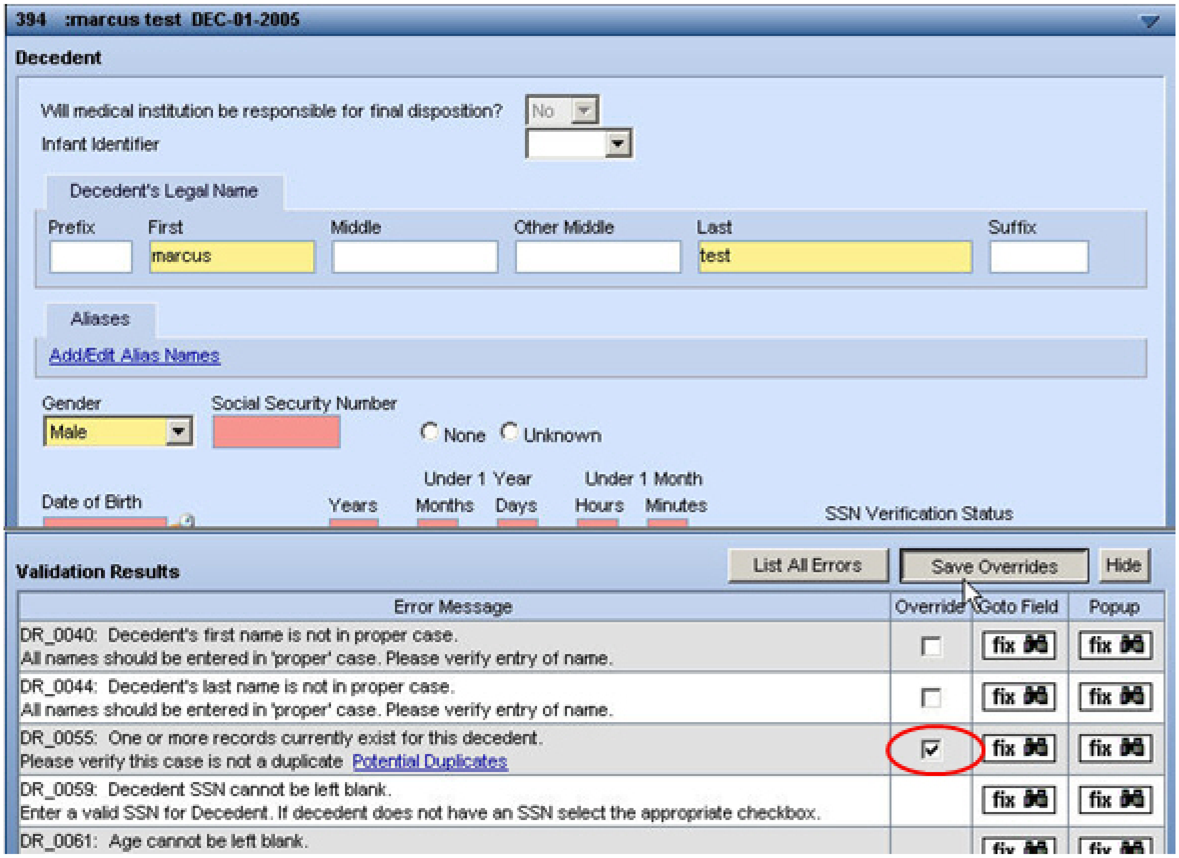
Place a checkmark in the checkbox located in the **Override** column and click the **Save Overrides** button.



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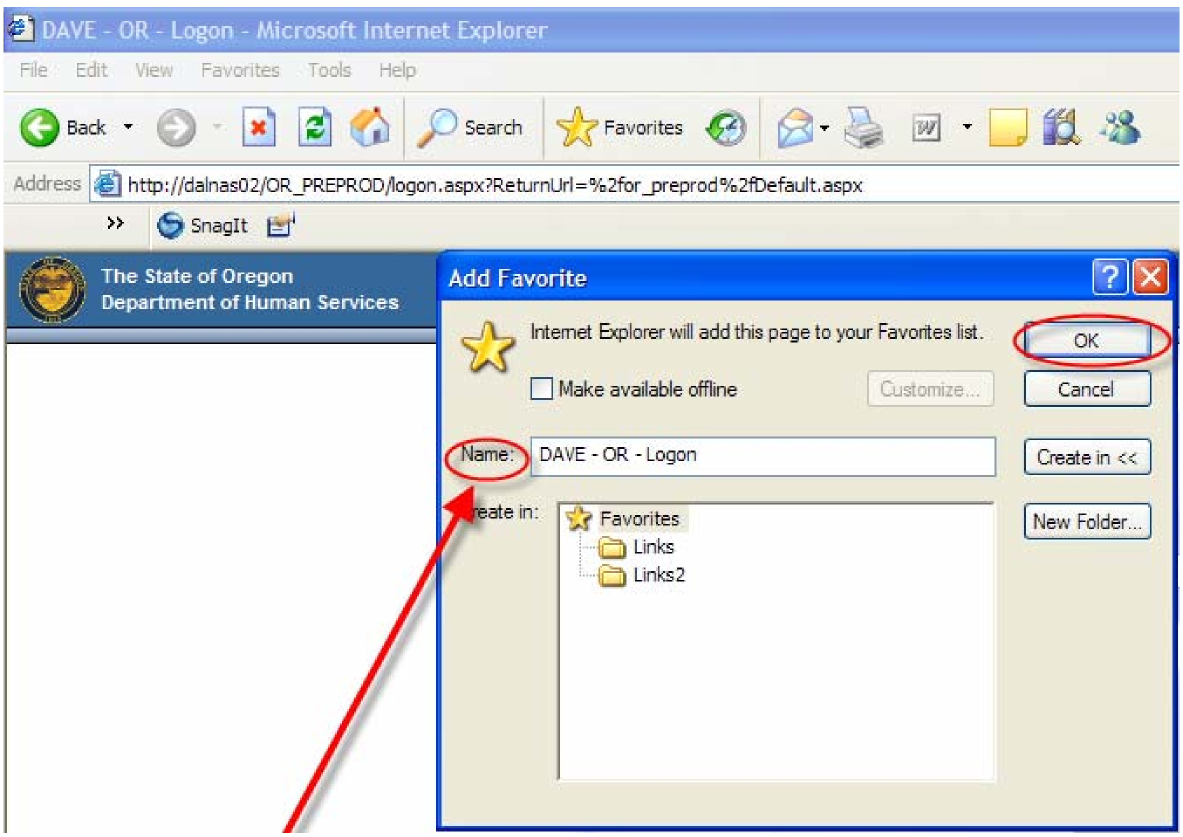
Main

Logging Into the DAVE™ Application

DAVE™ is a web-based application. All of your work in the **DAVE™** system will be done using Microsoft's Internet Explorer (IE) web-browser. Once you have accessed the system and have reached the login page you should add the **DAVE™** login page to your list of IE Favorites. Favorites are internet shortcuts that allow you to navigate to a specific website quickly and easily.

Creating an IE Favorite

You will be provided with a URL (Uniform Resource Locater) that will take you to the **DAVE™** login page. Once that page is displayed in your browser, then select **Favorites -> Add To Favorites** from the IE toolbar. This will launch the **Favorites** dialog shown below:



The **Name** field will automatically be filled in for you. To save the **Favorite** click the **OK** button. You will now be able to select the **DAVE™** website from your list of stored **Favorites**.

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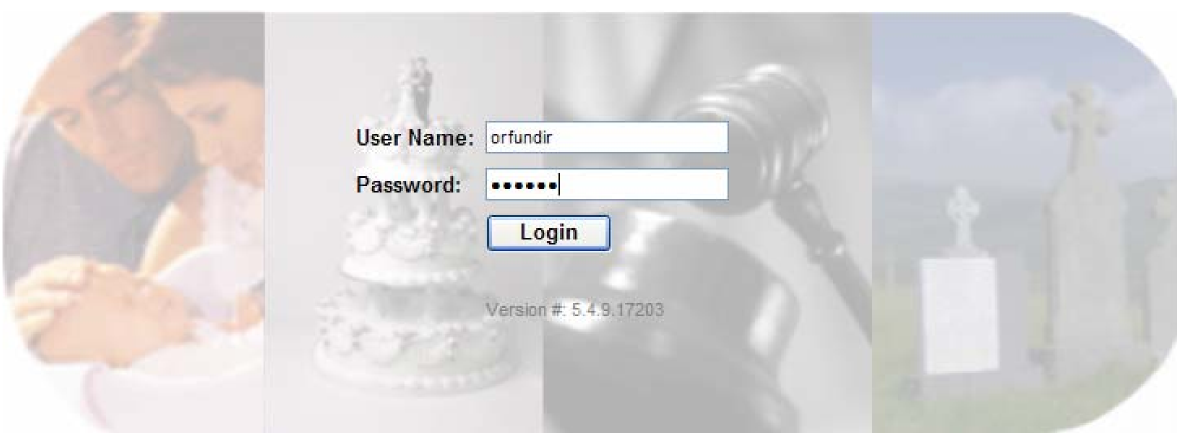
Desktop Shortcuts
Another way to provide for quick access to the **DAVE™** application is to create a **Desktop shortcut**. First, navigate to the **DAVE™** login page, shown below. Then, from the IE toolbar select **File -> Send -> Shortcut to Desktop**. This will create an IE icon on your desktop that, when selected, will automatically launch Internet Explorer and open the **DAVE™** login page.

Using either a **Desktop shortcut** or a pre-assigned IE **Favorite**, access the main **DAVE™** login page shown below:

Your system administrator will assign a unique **User Name** and **Password** for you to use when accessing the **DAVE™** system.

Enter your assigned username in the **User Name:** field and your password in the **Password:** field and click the **Login** button. Later, you will learn how to change your password.



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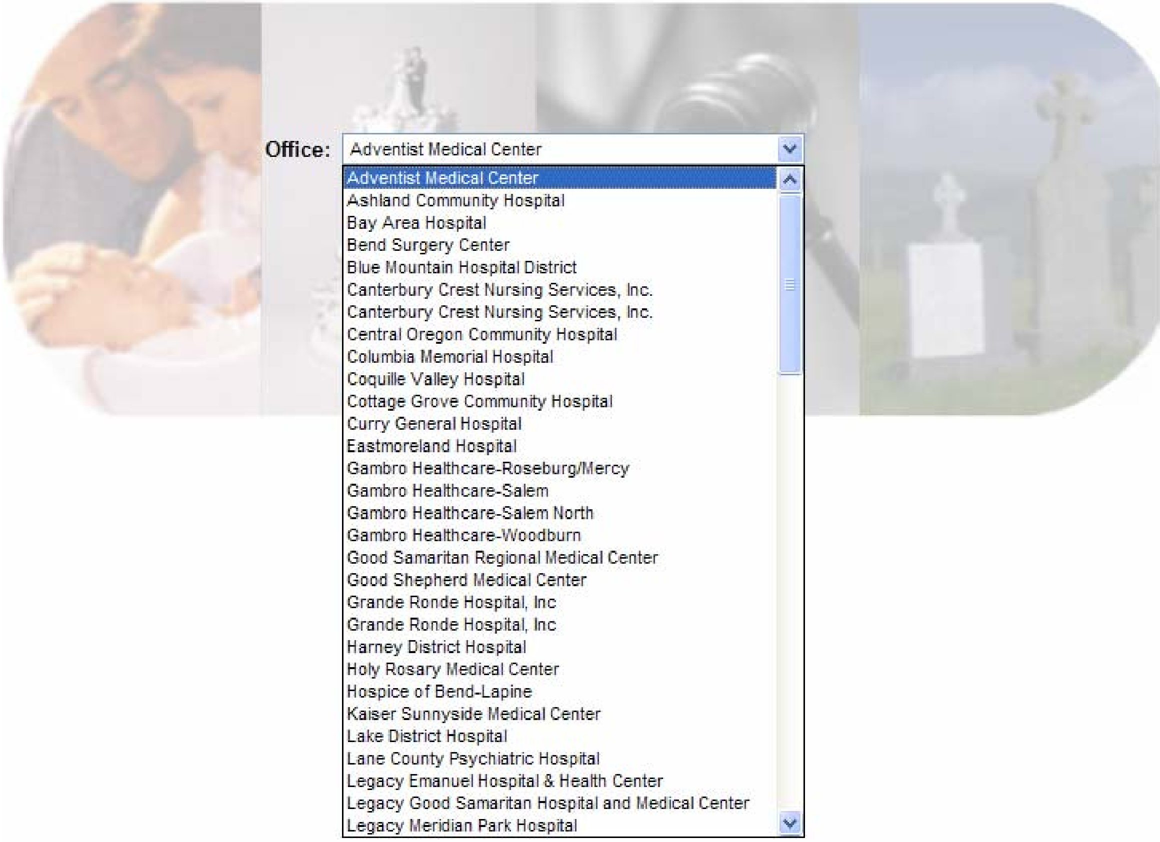
If your **User Name** is associated with more than one office or location, then you must also make a selection from the **Office:** dropdown list, shown below:



Once you have made your office selection, if necessary, click the **Continue** button to finish logging into the **DAVE™** application.

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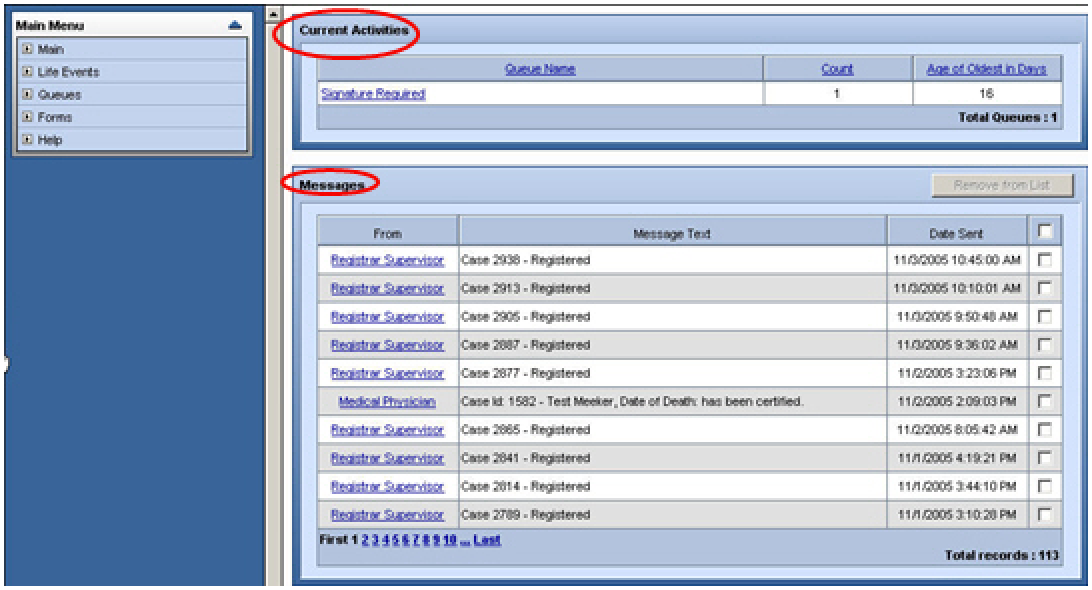
You should now be logged into the **DAVE™** application **Main Menu** page with the **Current Activities** and **Messages** frames displayed:



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Home

After successfully logging in, you will be presented with a user specific **Home** page. Each home page is unique to each user and shows a listing of vital records in need of attention. Essentially, your home page serves as a 'to do' list or reminder list of activities that you need to be working on.

Below is an example of the home page that a Registration Supervisor would see.

Notice on the left of the page is the **Main Menu**. From here, you will navigate throughout the **DAVE™** application.

The **Current Activities** pane displays a listing of the **Queues** that contain records requiring immediate attention. (See **Queues**, elsewhere in this training guide, for more information about **Queues**.) In the example below, there is 1 record in the signature queue needing attention. This record is 16 days old.

Clicking on the **Signature Required** link shown below would open the **Search by Registration Work Queue** page, allowing access to the records in the queue.

Current Activities

Queue Name	Count	Age of Oldest in Days
Signature Required	1	16
		Total Queues : 1

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We will look at how to access and edit records in the **DAVE™** system elsewhere in this manual.

Click the **Return** button to close this page and return to the **Main Menu**.

The other pane that appears when you first login to the **DAVE™** application is the **Messages** pane. Some **Messages** are text messages sent from User to User, while others are system generated and appear with no interaction from the user.

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

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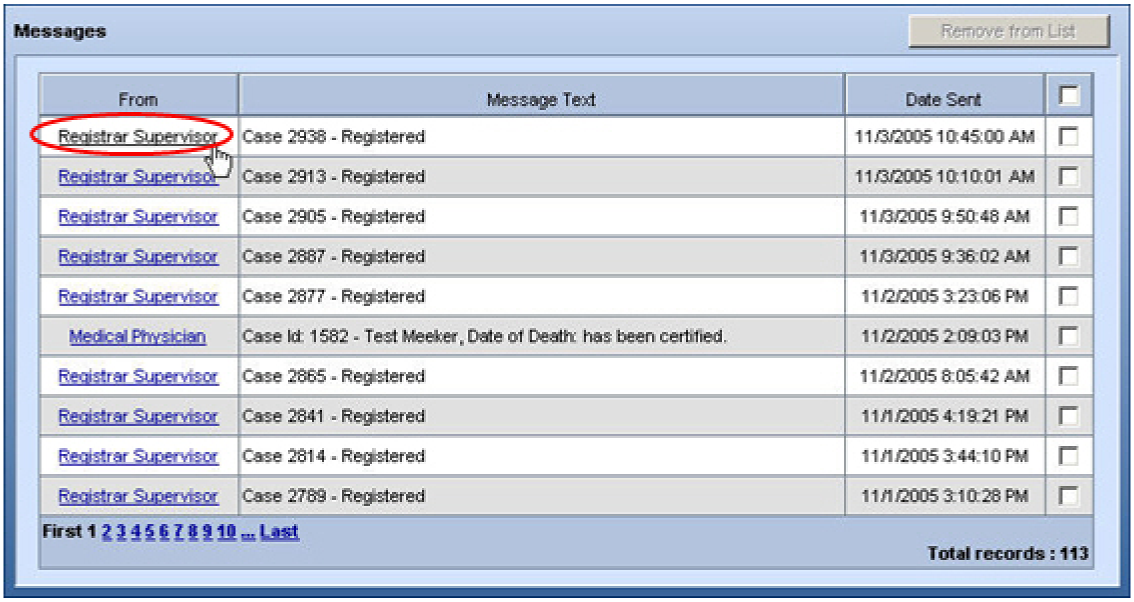
Clicking on any of the underlined links in the **From** column of the **Messages** pane will open that message for reviewing.



The **Message** window is a popup that appears on top of the main **DAVE™** page. After the **Message** has been read, click the **Close** button.

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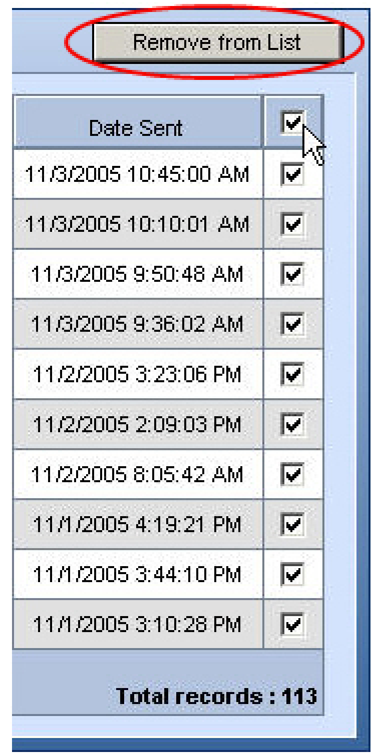
To remove a message from the **Messages** pane, place a checkmark in the checkbox next to the **Date Sent** column.



To remove all messages from the list, place a checkmark in the checkbox next to the **Date Sent** column header.

Notice that the **Remove from List** button is now active. Clicking the **Remove from list** button will remove any checked message from the list. If the checkbox next to the **Date Sent** column header is selected, all messages will be removed from the list.

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

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

You may return to the **Home** page from anywhere in the **DAVE™** application by selecting **Main -> Home**.

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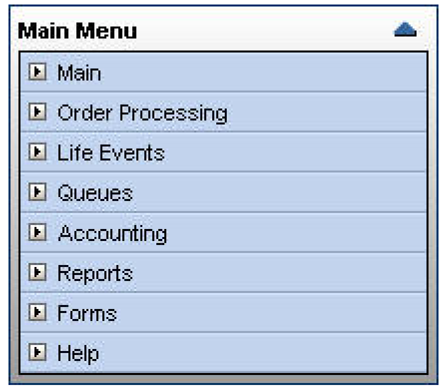
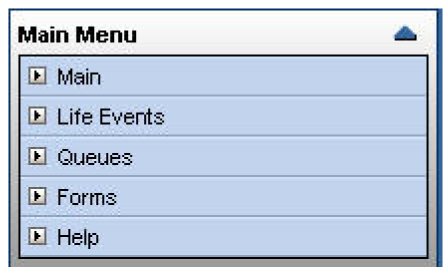
Main Menu

One thing to notice about the **Main Menu** is that it is dynamically created based on the profile of the user. In other words, no two types of users will have the same **Main Menu** options.

This is the **Main Menu** of a Registration Supervisor



This is the **Main Menu** of a Funeral Director



In the [Life Events](#) section we will see how menus such as the Death Registration and Birth Registration menus also vary according to user profile.

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Change Office

Some users may have access to records in more than one office or location. For example, a physician might serve as a resident in one hospital but work as a Medical Examiner in another. In this case, the physician would have one login, but would have access to multiple offices using that login. By selecting the **Change Office** link from the **Main Menu** the physician can quit working on cases in one hospital and begin working on cases in the other.

To change offices,

From the **Main Menu**, select **Main -> Change Office**

Click 'OK' on the pop-up window

The login page will refresh and display the **Office:** dropdown list, shown below. Select the desired office from the list.

At the login page, select the new office from the dropdown list, re-enter your password, and click **Login**.

You may now work cases from the new location or office.

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Change Password

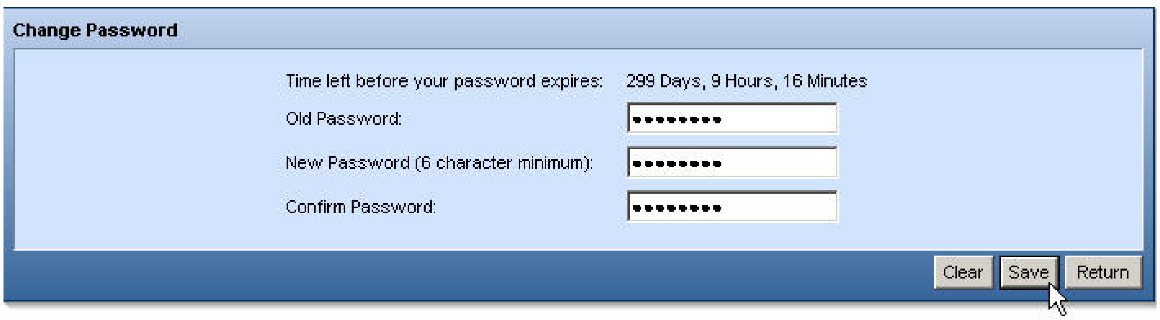
Your supervisor will provide you with a password that will enable you to login to the **DAVE**^{TM} system. This is just a temporary password and should be changed when you login for the first time.

To change your password,

From the **Main Menu**, select **Main -> Change Password**.

Enter your old or temporary password into the **Old Password** text entry box.

Enter your new password into the **New Password** text entry box. Passwords must be at least 6 characters in length and should be a combination of letters, number, uppercase and lowercase characters.



Re-enter the new password in the **Confirm Password** text entry box. NOTE: you must enter the exact same password both times.

Click the **Save** button.

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Messages

Throughout the course of your work day you will work on many cases. Some cases will be complete and others will be missing important data. Using **DAVE™** messaging, you will be able to send messages to any logged in user to request that information.

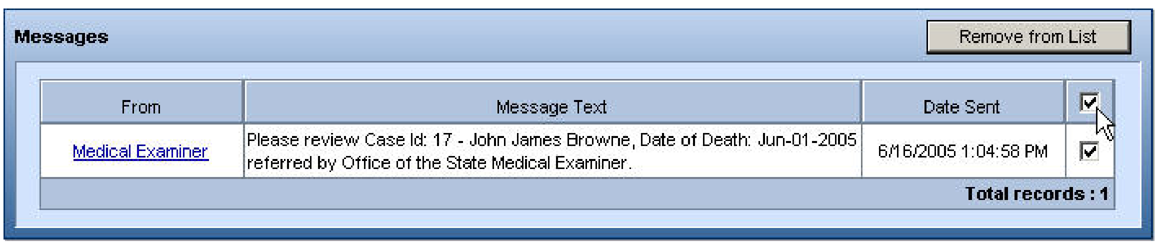
For example, you have a customer at the counter asking for a Death Certificate, but the Medical Examiner has not signed off on the case yet. Using the **Messages** utility you can send a message to the ME requesting that they complete the sign-off. Then, once they have certified the case they can message you back and let you know that the case has been signed. Additionally, performing certain actions within the **DAVE™** application will automatically trigger some, pre-programmed messages.

To send and receive messages,

From the **Main Menu**, select the **Main -> Messages**.

(Note: the **Messages** panel automatically displays when you login to the system.)

The **Messages** panel displays. The **From** column contains the name of the user that has sent the message. Click on the user name to open the message. Note: longer messages will not completely fit in the preview pane and will need to be opened to be read in their entirety.



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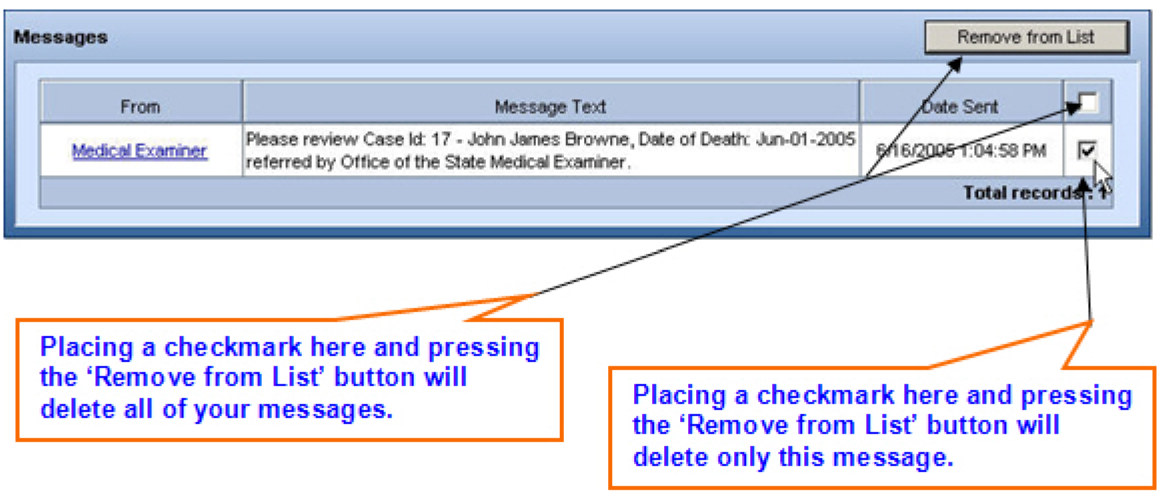
When you are done reading the message, click the **Close** button to close the message window and return to the **Main Menu**.

To delete a message, return to the **Main Menu** view and select a message by placing a checkmark in the corresponding checkbox. Then, click the **Remove from List** button to delete the message. Placing a checkmark in the checkbox to the right of the **Date Sent** column will check all messages. Do this only if you want to delete all messages.



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Logout

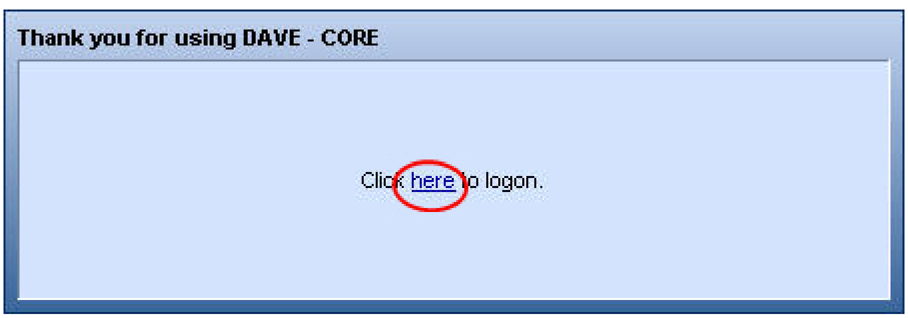
Whenever you are going to be away from your desk or workstation, whether you're going home for the day or just going to lunch, you should always log out of the **DAVE™** system.

To logout of the DAVE™ system,

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

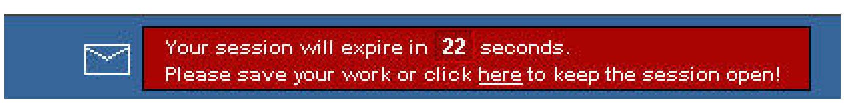
You will be prompted to "**Click OK to exit application**". Click the **OK** button to exit. If you do not want to logout of the application, click the **Cancel** button, instead.

From the "**Thank you for using DAVE™**" window, shown below, you can select the **here** link to return to the **DAVE™** Login page.



Automatic Time-Out Feature

If the user allows the DAVE™ application to sit idle an extended period of time, a time-out warning will appear at the top of the screen.



Once this warning appears, the user will have 60 seconds to click the here link to avoid being logged out of the system.

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Life Events

In this section you will learn about the various Life Event processing modules found in the **DAVE™** application. Life Events represent the bulk of what Vital Records processing is all about. Life Events include Birth, Death, Fetal Death, ITOP and Marriage and Divorce.

Death

VitalChek's **DAVE™** application includes a fully functional Electronic Death Registration System, or EDRS. The **DAVE™** EDRS allows both State staff and state partners such as Funeral Homes and Hospitals to initiate, update, and process death records. For example, a death record can be started by the Funeral Home, the Attending Physician, or an employee of the local registrar's office.

By enabling state partners to initiate and update vital records, state staff workers are free to work on other issues. Additionally, this gives the partners a vested interest in the overall death record process, making them active participants instead of just 'interested parties'.

Search

Most of your time will be spent working on pre-existing death records. These could be complete or incomplete records that were started by a funeral home or another member of the state's office staff. The **DAVE™** system provides a powerful search engine that can be used to locate a specific record, helping to eliminate the possibility of pulling up and working on an erroneous record.

Search By Identifier

The **DAVE™** application offers several different ways to search for a record. First, let's look at how to "**Search By Identifier**". "Identifiers" are individual data elements within a record. These consist of demographic data concerning the decedent, information about the involved partners, or even information relevant to the state itself. To begin a "Search By Identifier", follow these steps:

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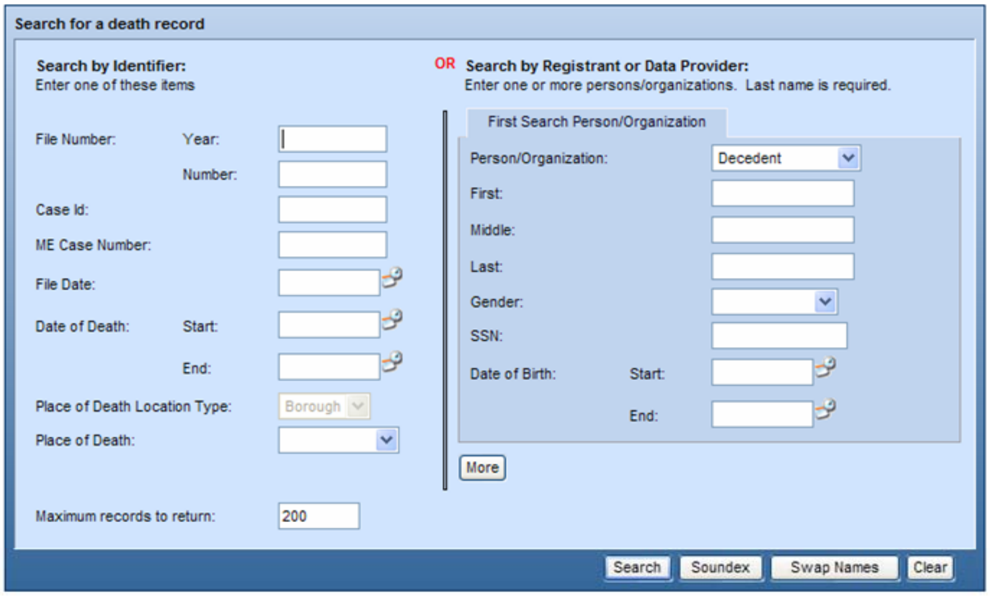
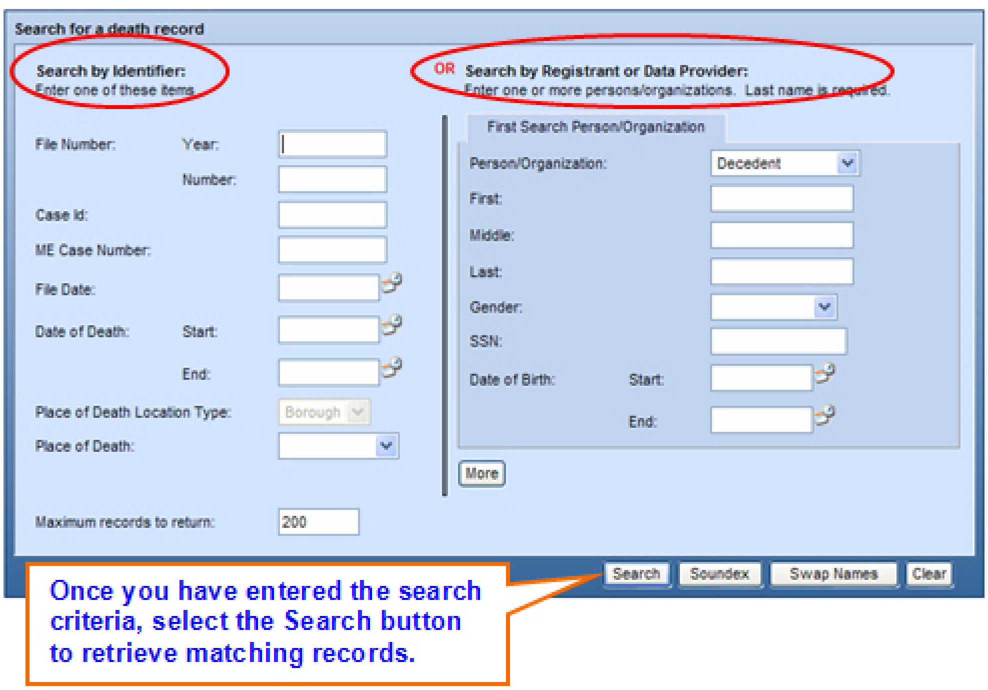
From the Main Menu select **Life Events -> Death -> Search**.



Notice that there are two search options: **Search by Identifier OR Search by Registrant or Data Provider**.



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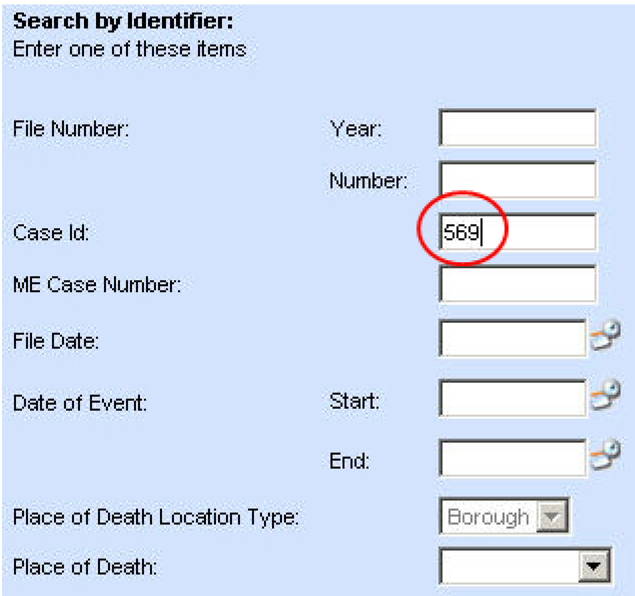
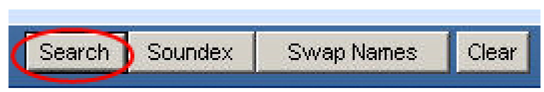
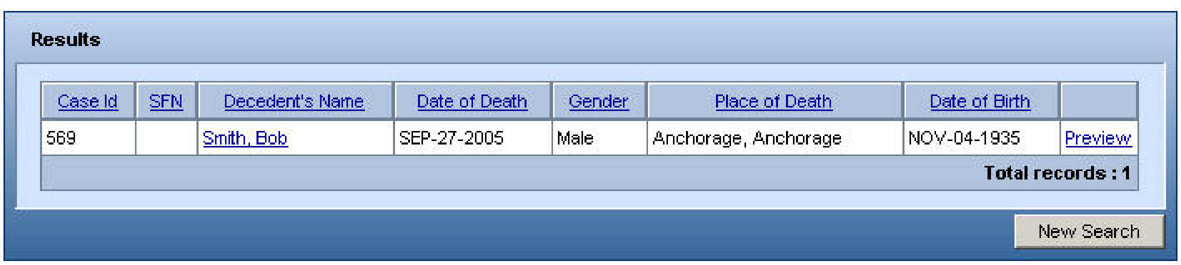
Search by Identifier using **File Number**, **Case Id**, or **ME Case Number** will always return a single registration. However, you must know at least one of the searchable identifiers.



In order to **Search by Identifier,** you must type in at least one of the identifiers shown on the left side of the page. In this example, we are searching for **Case Id:** number 569.

Click on the **Search** button at the bottom of the page to execute the search and display the **Results** page shown below.





Note: Search by Identifier will only work when you have specific, record related data. If you do not have any of this information then you will have to use the other search option: Search by Registrant or Data Provider.

In the example above, we used the **Search by Identifier** function to find a record based on its **Case ID**. However, there are other identifiers that can be used to locate records:

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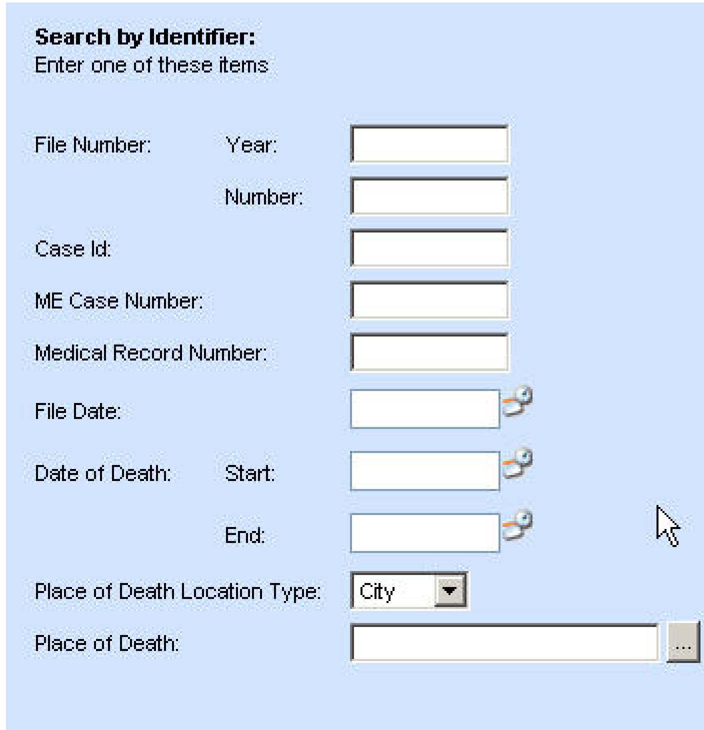
File Number: a file number is composed of two elements: **Year:** and **Number:**. **Year** represents the year in which the death occurred. **Number** is the unique number assigned to the record in question. Searching on either of these without the other will generate a system error.



ME Case Number: the unique number assigned to a record by a medical examiner. NOTE: not all records will have a corresponding **ME Case Number**.

Medical Record Number: If the registration in question has a known, unique Medical Record Number, key that here.

File Date: the exact date on which death occurred. When searching by **File Date**, all records filed on that date will be returned.

Date of Event: **Date of Event** allows you to search through a range of dates. By using both a **Start:** and **End:** date, the system will return all records with a **File Date** that falls within that range. If only a **Start:** date is used, then the system will look for an exact match, only.

Place of Death Location Type: is used in conjunction with the next control, **Place of Death**. The selection made here will determine the choices available below.

Place of Death: The choices available from the **Place of Death** control are based on the selection made in the **Place of Death Location Type** above.

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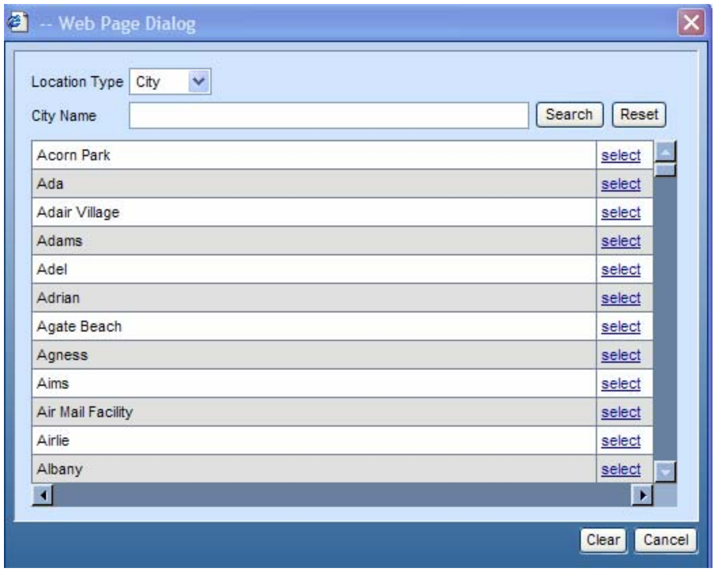
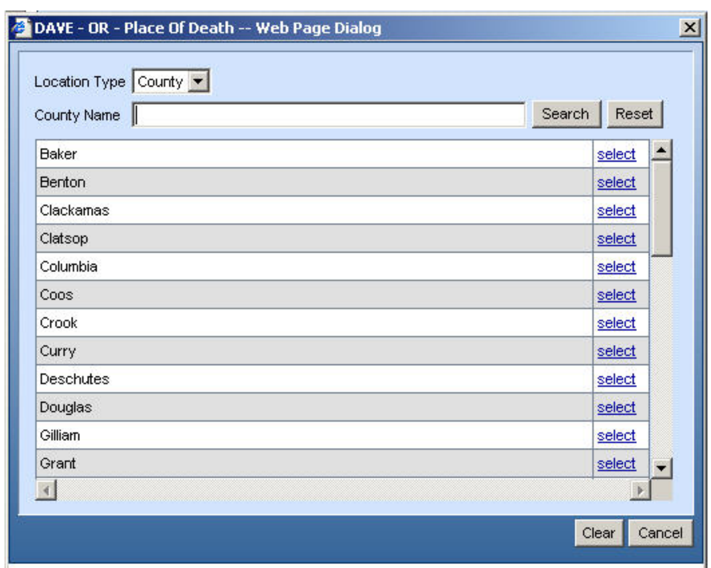
For example, if **City** is selected in **Place of Death Location Type**, then clicking on the **Place of Death** lookup button ( ) will display a list of cities to choose from:



If **County** is selected in **Place of Death Location Type**, then clicking on the **Place of Death** lookup button ( ) will display a list of counties to choose from:



For all of these searches, once you have keyed the search criteria click the **Search** button to proceed.

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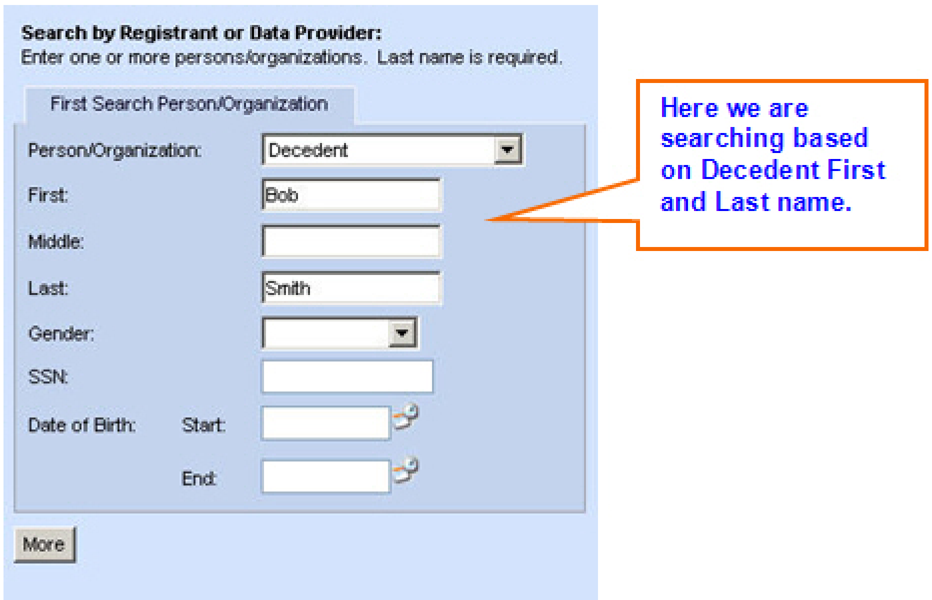
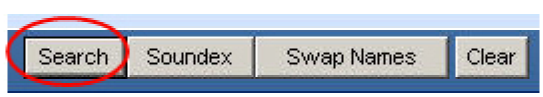
Search by Registrant or Data Provider
Searching by Identifier looks for data elements relevant to a specific case. **Search by Registrant of Data Provider** allows you to enter more general, entity related data for your search. For example, you can input the decedent's name, gender, data of birth or other demographic data. You can also search using state partner data, i.e., Funeral Home director, Attending Physician, etc… You can also search using criteria from more than one person related to the death record.

Make a selection from the **Person/Organization** dropdown list. In the example below, we selected **Decedent**.



Enter the decedent **First** and **Last** name in their corresponding controls.

Click the **Search** button to execute the search and retrieve matching records.



If only one entry matching our search criteria exists in the database, only one case will appear in the search **Results** box.

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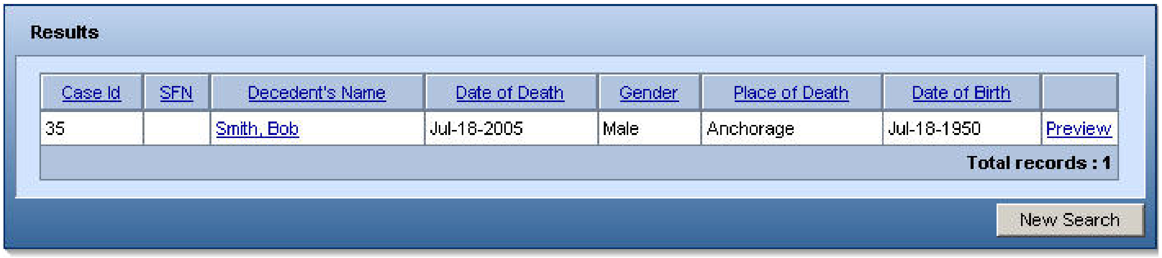

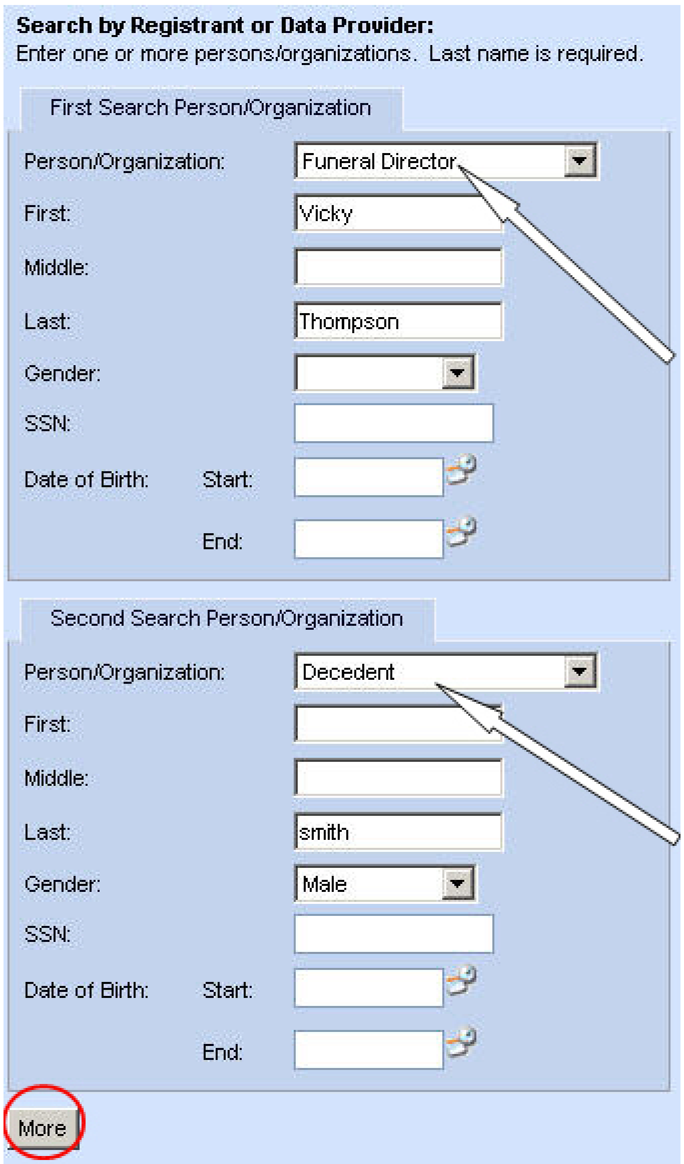

However, what if you do not know the decedent's name? What if you know only the decedent's gender, but you also know which Funeral Director filed the certificate? In this case you can search using the name of the funeral home AND the decedent's gender.

From the **Person / Organization:** dropdown list select **Funeral Director** and then type in the first and last name of any funeral director that has been added as a user in the system.

Locate and click the **More** button. A **Second Search Person/Organization** tab will appear.

In the second set of text box controls, select **Decedent** from the **Person/Organization** dropdown list, enter the decedent's **Last** name "Smith", and select **Male** from the **Gender** dropdown list.

Click the **Search** button.

The result of this search will be all of the male decedents with in the system, with a last name of Smith, who are associated with Funeral Director Vicky Thompson.

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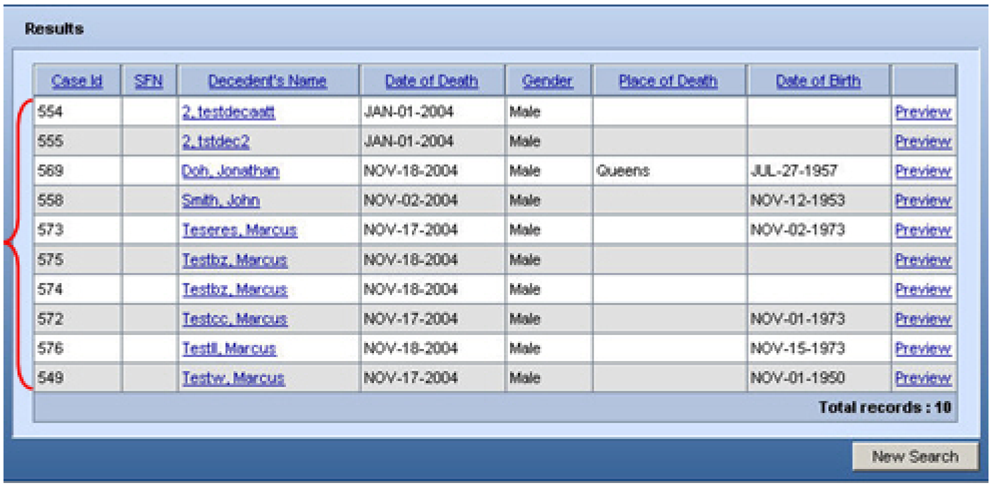
The More button can be used to add multiple search entities. Adding multiple search entities will help narrow the list of results returned. However, adding too many entities can result in no results being returned.



Results

Case Id	SFN	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
554		2, testdecaatt	JAN-01-2004	Male			Preview
555		2, tstdec2	JAN-01-2004	Male			Preview
569		Doh, Jonathan	NOV-18-2004	Male	Queens	JUL-27-1957	Preview
558		Smith, John	NOV-02-2004	Male		NOV-12-1953	Preview
573		Teseres, Marcus	NOV-17-2004	Male		NOV-02-1973	Preview
575		Testbz, Marcus	NOV-18-2004	Male			Preview
574		Testbz, Marcus	NOV-18-2004	Male			Preview
572		Testcc, Marcus	NOV-17-2004	Male		NOV-01-1973	Preview
576		Testl, Marcus	NOV-18-2004	Male		NOV-15-1973	Preview
549		Testw, Marcus	NOV-17-2004	Male		NOV-01-1950	Preview

Total records : 10

New Search

As you can see, this search returned 10 records. You will want to build your searches to be as specific as possible to minimize the number of entries found.

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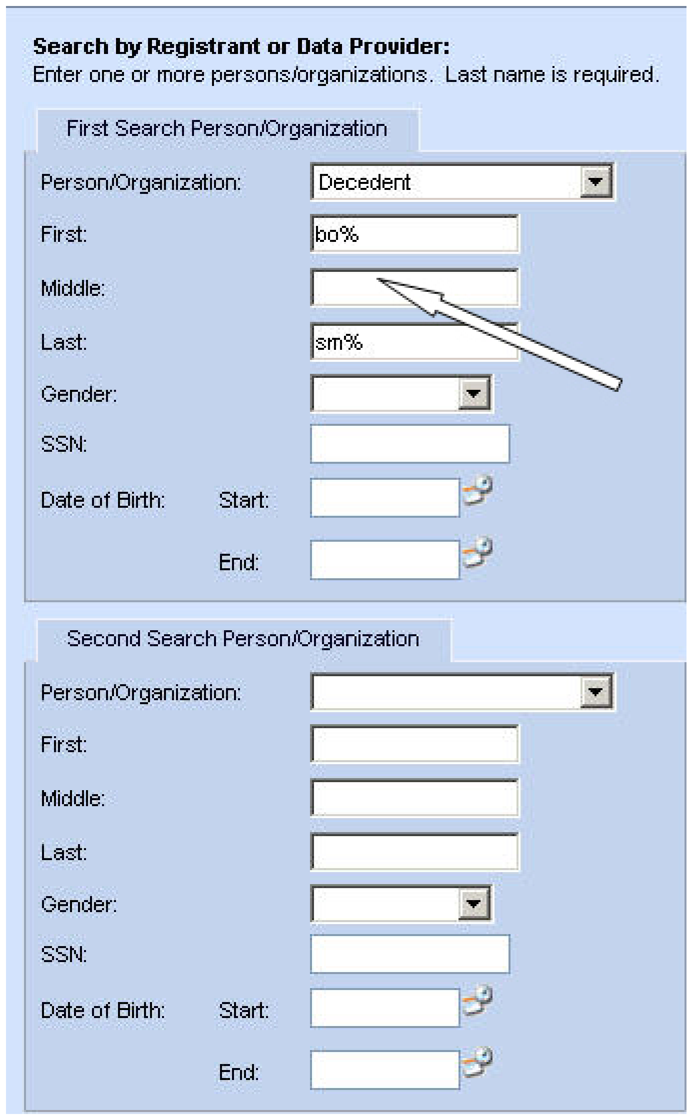
Wildcard Searches

Sometimes you may not be sure of the spelling of a name or maybe you only have a partial piece of information to use to locate a record. In these cases, **Wildcard Searches** can be used to locate records.

Wildcards are computer characters used to represent any missing or unknown value when searching for records.

Using the **Search by Registrant or Data Provider** search tabs, input the information that you do have followed by a "%" sign. In this example, we were not sure of the spelling of decedent's first name, but we did know that the name begins 'Bo'.

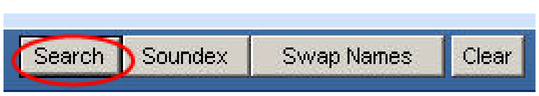


After typing in 'Bo' we follow that up with a percent sign (**%**).

In this case, the % sign tells **DAVE™** that we want to view all records with decedent's whose first name starts with 'Bo'.

Next, repeat these steps for the **Last** name field by entering 'sm%'.

Click the **Search** button to execute this search and view the records returned.



As you can see from the **Results** page displayed below, wildcard searches have the potential to return many rows. Again, build your searches carefully so that they return the fewest number of records possible, while still returning the case you are looking for.

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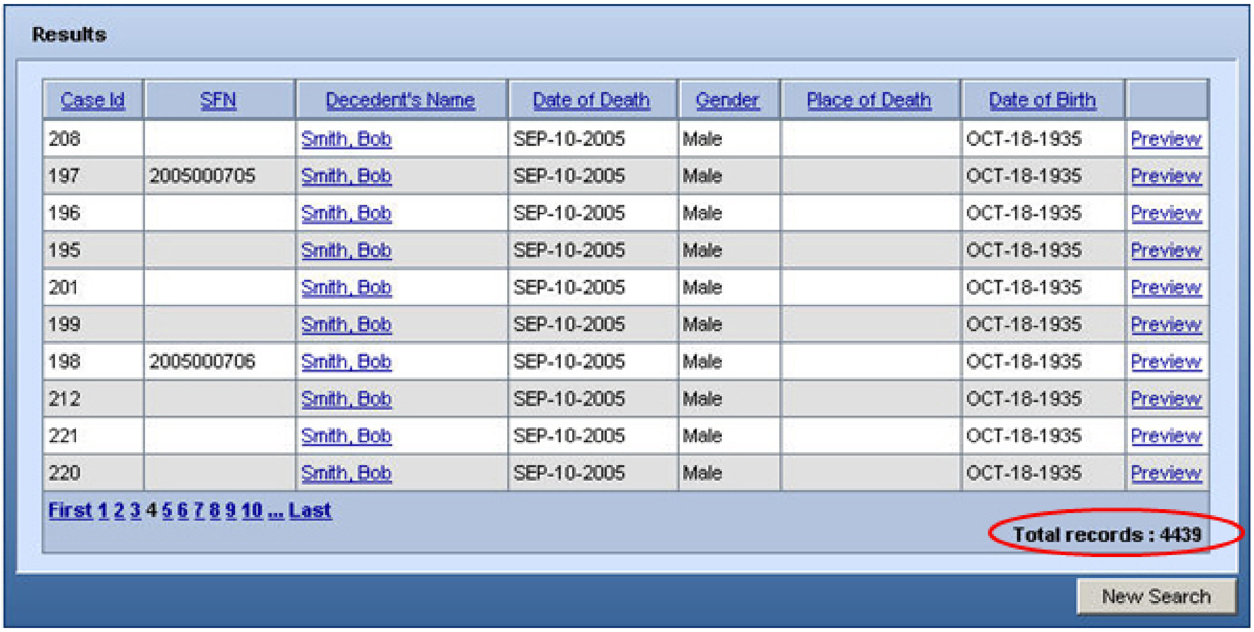

Results

Case Id	SFN	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
208		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
197	2005000705	Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
196		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
195		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
201		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
199		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
198	2005000706	Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
212		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
221		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
220		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview

First 1 2 3 4 5 6 7 8 9 10 ... Last

Total records : 4439

New Search

Wildcard searches will work only when using Search by Registrant or Data Provider. They *will not* work with Search by Identifier.

Wildcard searches can be performed against any of the criteria shown here: First Name, Middle, Last Name, or SSN.

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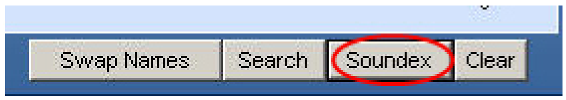
Soundex Searches

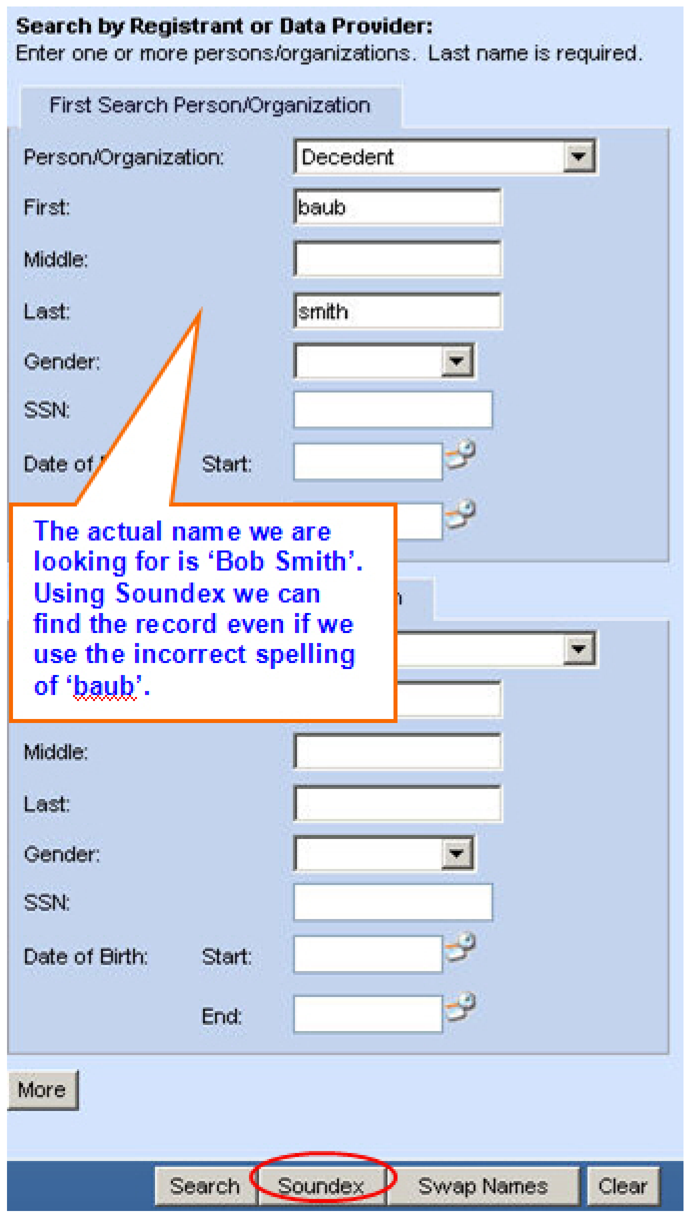
The searches above assume that you know how to spell the name of the decedent. For those times when you are unsure of the spelling of a name, you can use a **Soundex** search to locate a record. **Soundex** searches look for records with familiar sounding names to them. The **Soundex** button is located at the bottom of the main **Search** page next to the **Search** button.



From the main search page enter a partial name or sound-alike name into the **First** and **Last** name box under **Search By Registrant or Data Provider**.

In this example, the name we are looking for is 'Bob Smith'. However, using **Soundex** we should be able find the case using a sound-alike name of 'baub smith'.

Now, select the **Soundex** button, instead of the **Search** button.



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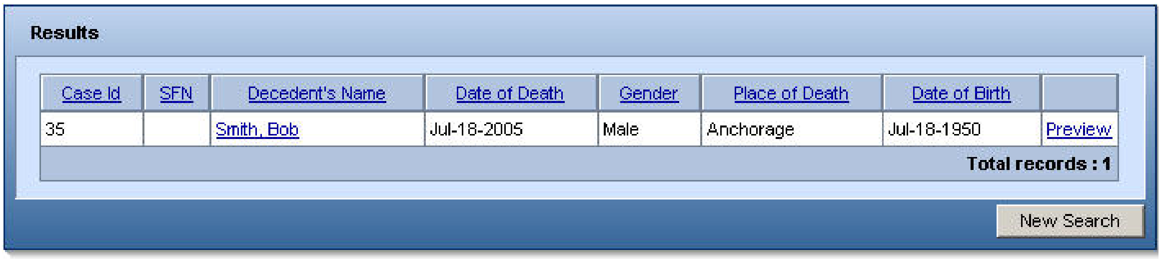
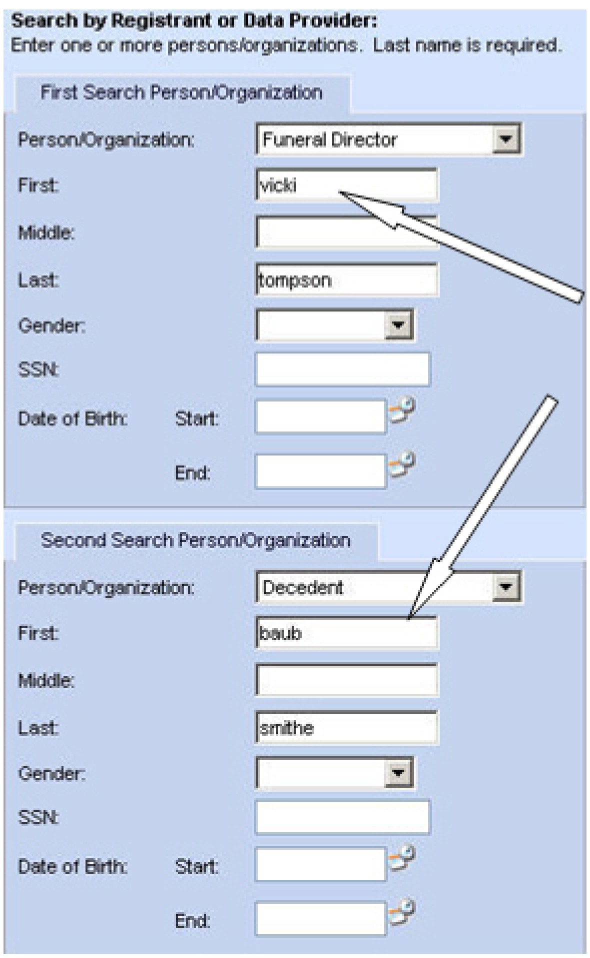
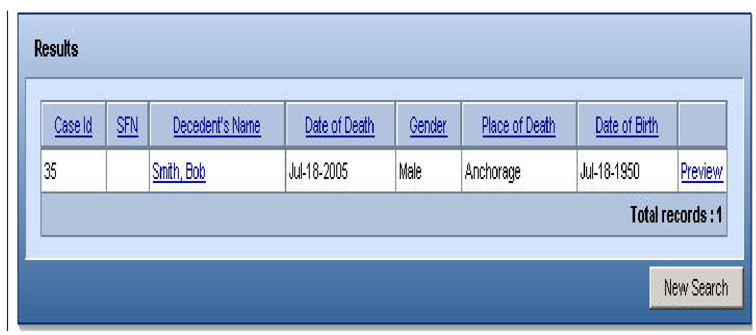
Notice that, even though we used a sound-alike name, **Soundex** was able to find the registration we were looking for.





Soundex can also be used to search for Decedent's, Funeral Homes, Funeral Directors or any combination of Person/Organization; *even when names have been misspelled.*

In this example, we have misspelled **Funeral Director** Vick***y*** Thom***p***son *and* the decedent's **First** and **Last** names, but **Soundex** found the registration anyway.



Like Wildcards, Soundex cannot be used with Search by Identifier.

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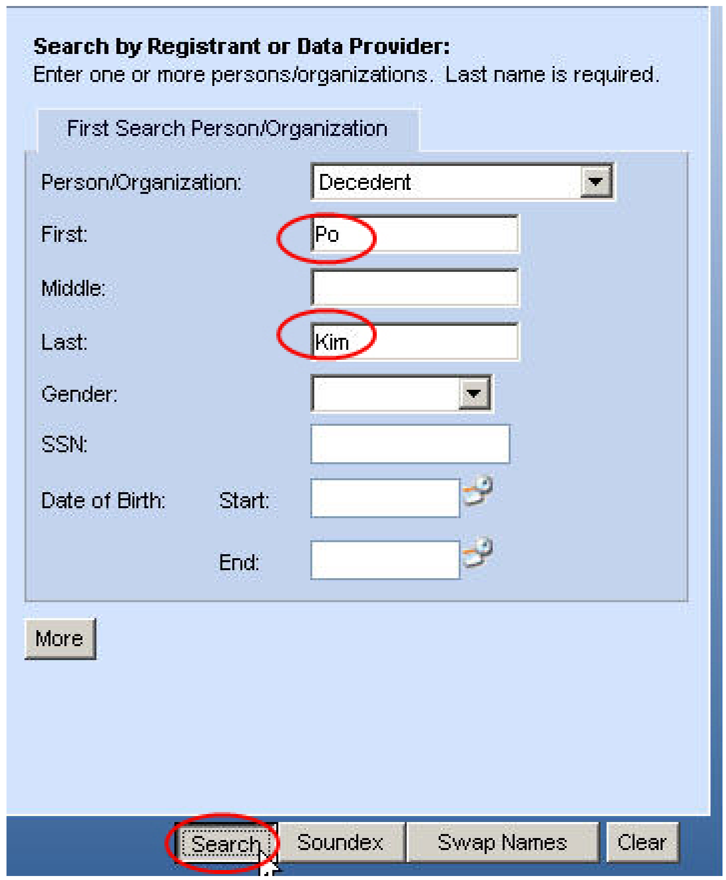
Swap Names

The **Swap Names** feature to search for cases when there is some ambiguity between the First and Last names. The **Swap Names** button is located at the bottom of the main search page next to the **Soundex** button.

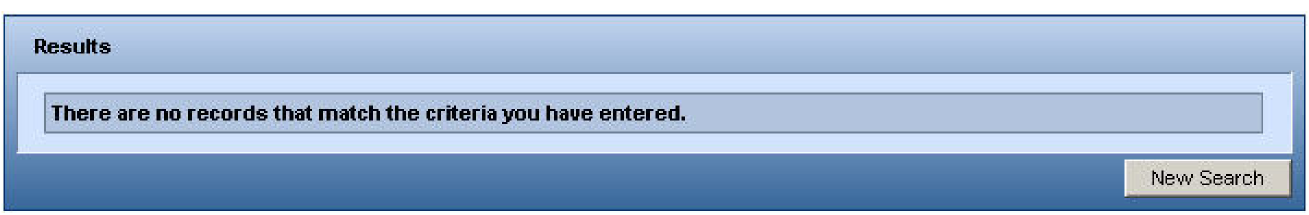
In certain cultures, a person's family name often comes before their given name. When this is the case, a standard search can sometimes fail to retrieve a record.

In the example shown here, we are searching for a decedent named **Kim Po**.

However, based on information we received from an applicant we have used **Po** as the **First** name and **Kim** as the **Last** name.



Clicking the **Search** button and initiating a standard search did not return the desired record:



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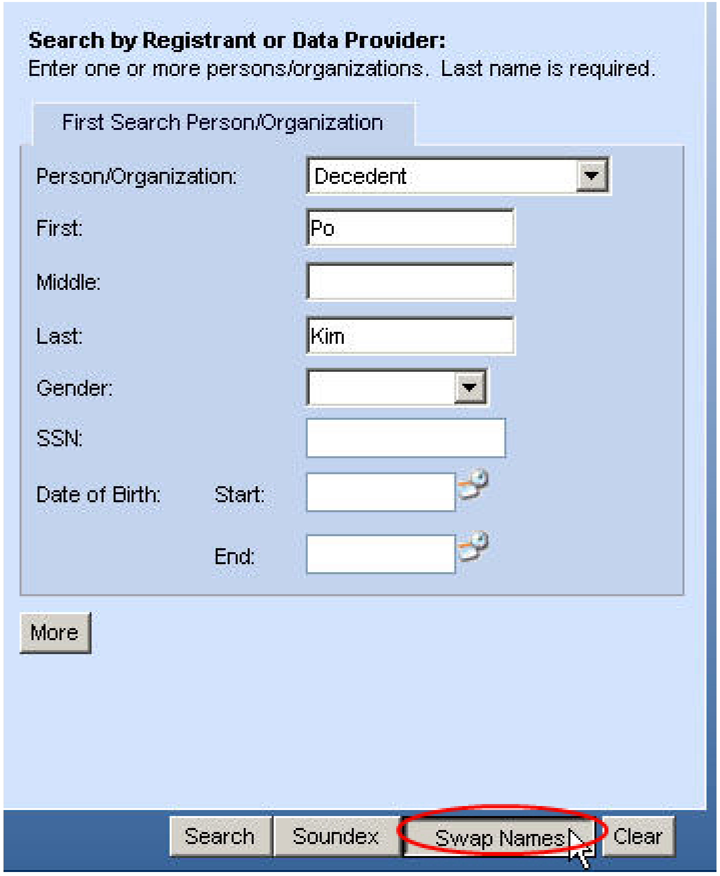
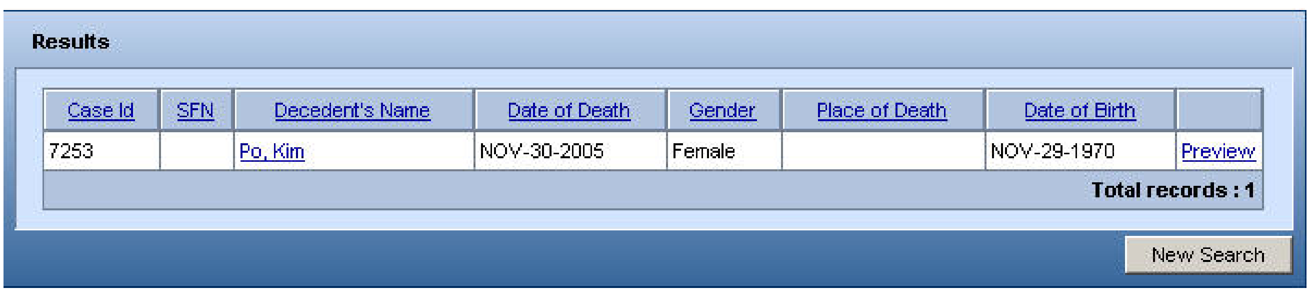


However, using the same search criteria we can find the record by using the **Swap Names** feature.

Using **Swap Names** found the record even though the names were out of order.



Like Wildcards and Soundex, Swap Names cannot be used with Search by Identifier.

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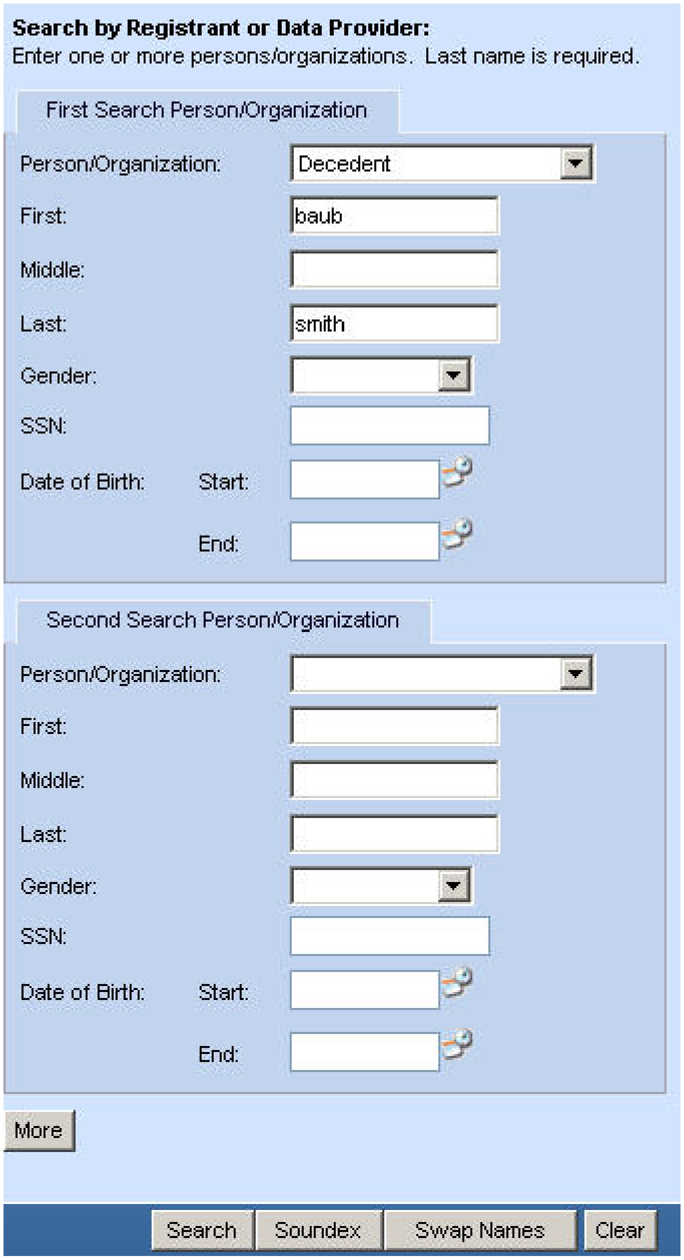
Search Results

Now that we have found some records, examine the results of our searches and learn how to access death records once you have found them.



Previously, we performed a search that retrieved all decedents with a **Soundex** equivalent name of "Bob Smith".

This search returned the records shown on the next page. Now, let's take a closer look at those results and how we can work with them.

Notice that, in the search results below, 4439 records were returned, sorted by decedent's last name. Searching for common names like Bob Smith, results in so many records being returned that this sort order is not very useful.

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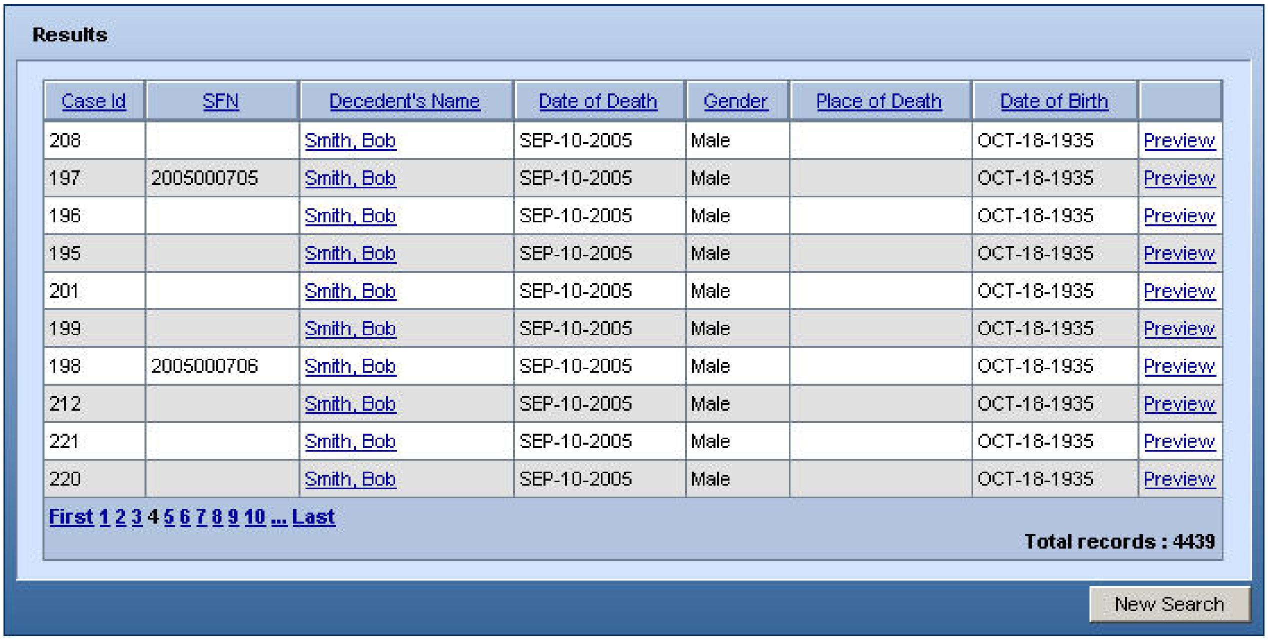


Results

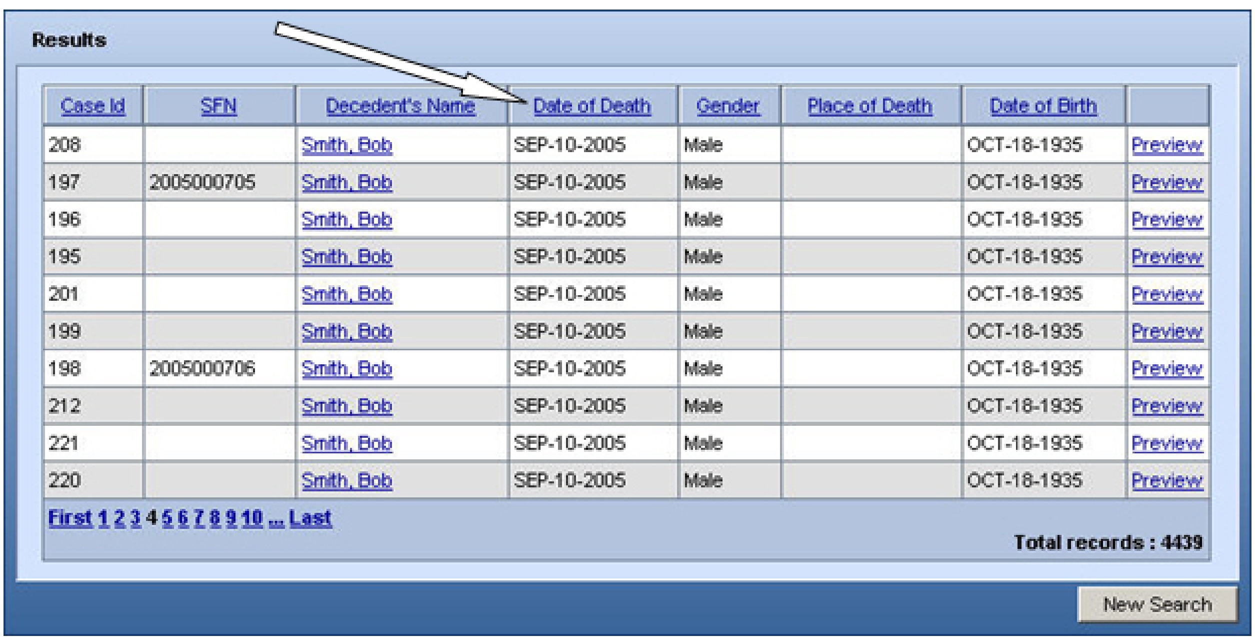
Case Id	SFN	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
208		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
197	2005000705	Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
196		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
195		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
201		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
199		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
198	2005000706	Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
212		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
221		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
220		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview

First 1 2 3 4 5 6 7 8 9 10 ... Last

Total records : 4439

New Search

However, all of the column headers in the results page are underlined links. These links allow you to change the sort order of the **Results** page. This can be very helpful in locating the specific case that you are looking for. In the example below, we have changed the sort order by selecting the **Date of Death** column header:



Results

Case Id	SFN	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
208		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
197	2005000705	Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
196		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
195		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
201		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
199		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
198	2005000706	Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
212		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
221		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview
220		Smith, Bob	SEP-10-2005	Male		OCT-18-1935	Preview

First 1 2 3 4 5 6 7 8 9 10 ... Last

Total records : 4439

New Search

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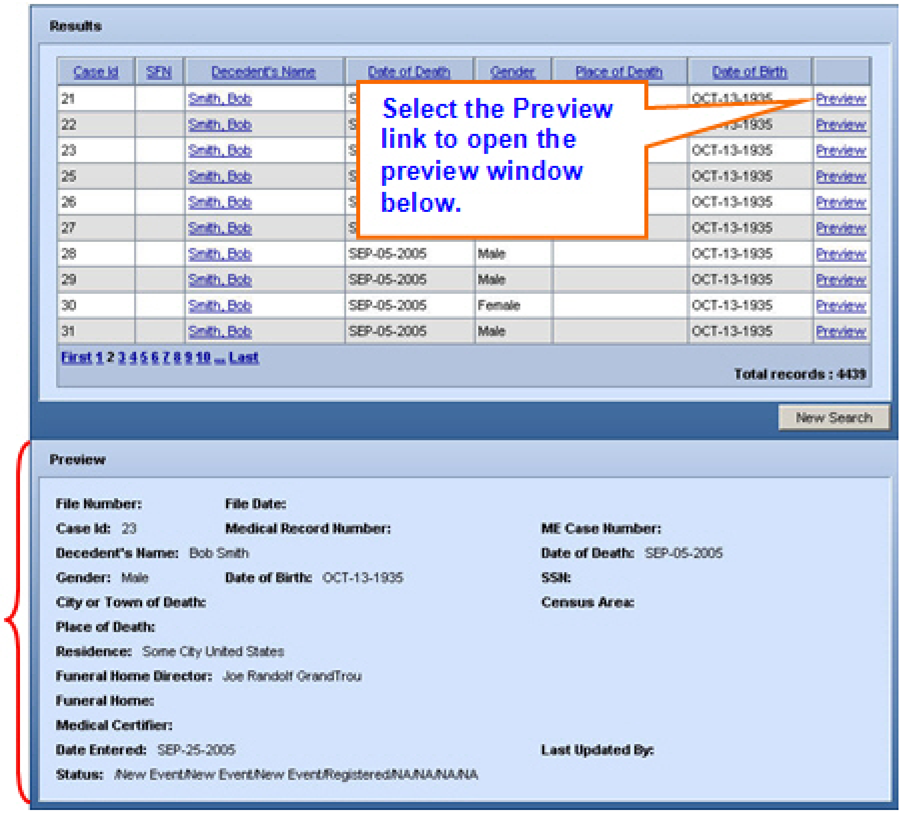
Previewing a Record

Still not sure if you have the correct case? Simply locate the **Preview** link in any of the entries and click on it. This will open a **Preview** page of that particular registration.



This preview panel helps you determine whether or not you have selected the right case.

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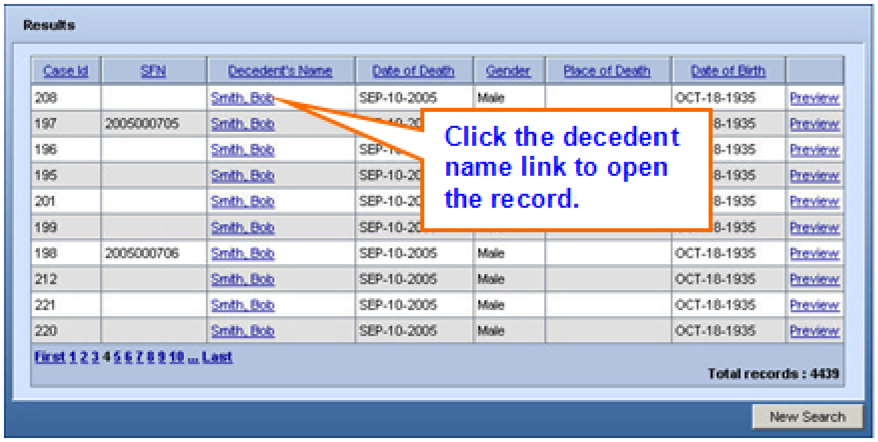
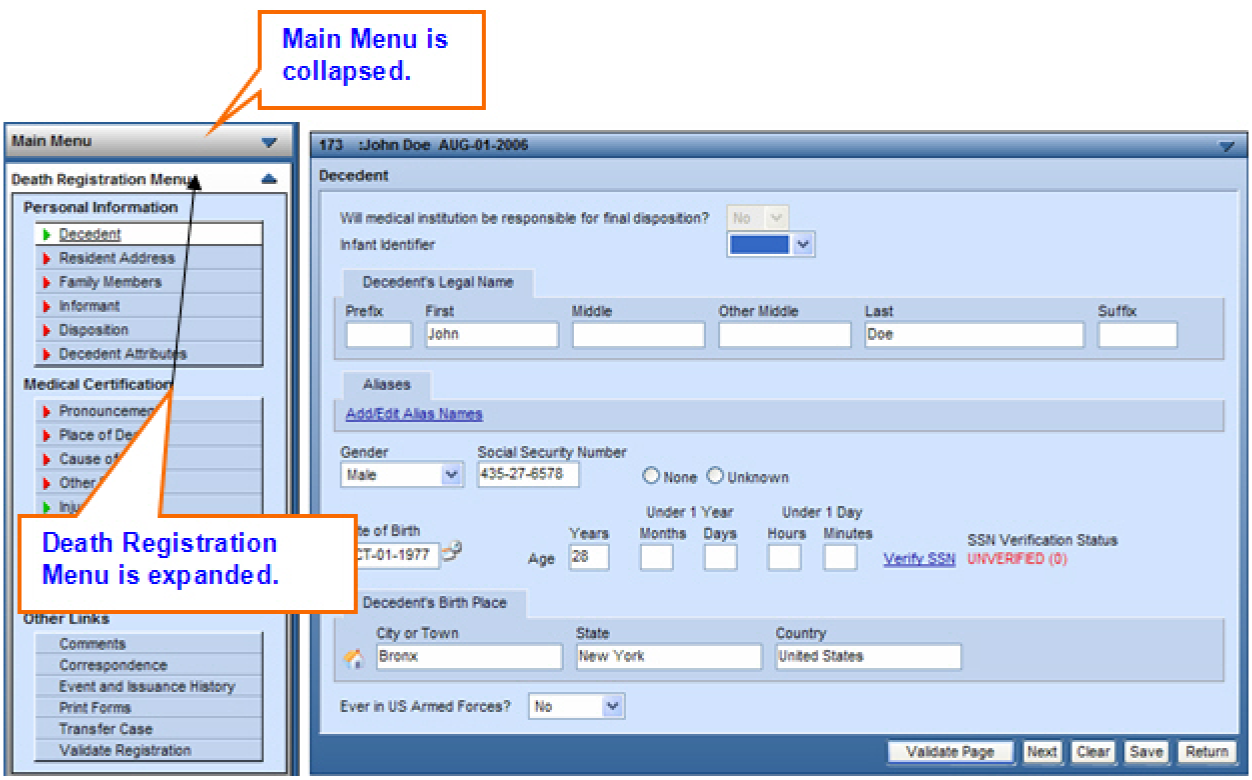
Once you have previewed the registration and are sure that you have located the correct record, click on the decedent's name to open the actual record.



You should now see the **Decedent Personal Information** page. Also, note that the **Main Menu** you have been working from is collapsed and a new, **Death Registration Menu** has been opened.



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Death Registration Menu

The **Death Registration Menu** provides links to a series of pages that are used for gathering all the information needed to Pronounce, Sign and Certify a death record.

Not all pages will be available to all users. For example, the **Medical Certification** pages will be available to physicians, but not funeral home directors. The role based security setup in the **DAVE™** application controls which pages are available to each user.

The list of pages in the **Death Registration Menu** is broken down into sub-menus. Again, not all sub-menus will be available to all users. Sometimes, a sub-menu may be available to multiple user role types, but a different set of pages will be available to each. The first category, **Personal Information**, contains those pages necessary to gather personal information about the decedent.

Personal Information

Here is where we begin to gather information about the decedent.

Decedent

The first page in the **Personal Information** sub-menu is the **Decedent** page. This page is available to all users, but write access is restricted based on user type and system security privileges. Any grayed out fields indicate that the current user does not have "write-access" to the information in these fields.

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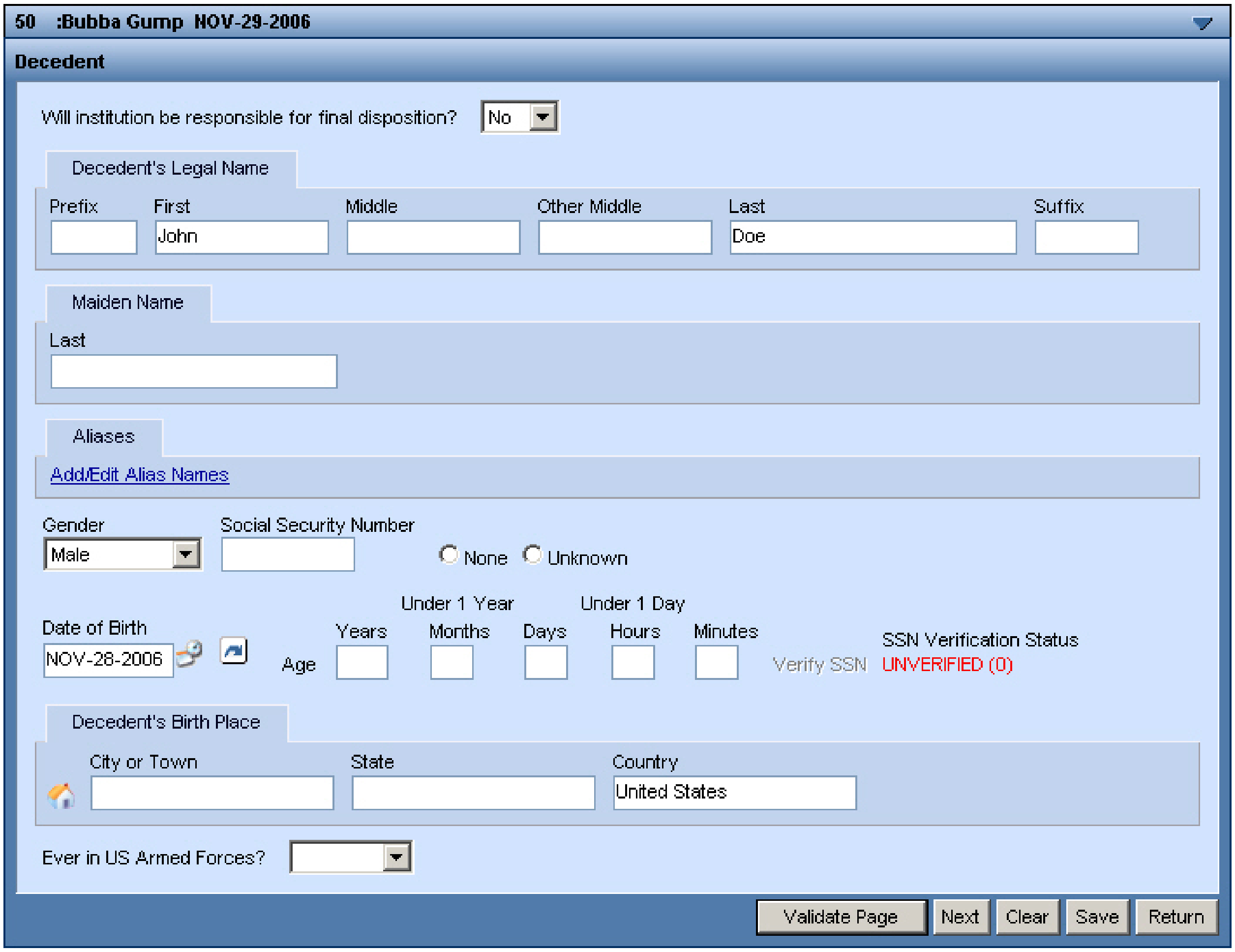

Will medical institution be responsible for final disposition? In the example above, **No** was selected. However, if no funeral director is going to be associated with the record then we would have selected **Yes**. If a funeral home will be responsible for final disposition, then a funeral home user will complete the **Decedent** page.

In the **Decedent's Legal Name** tab enter the decedent's first, middle and last name. Additionally, if a prefix is desired then enter that in the **Prefix** field. Lastly, if the decedent has a name suffix, such as Junior or Senior, enter that suffix in the **Suffix** field.

Maiden Name is available only if the decedent is a female and should only be completed if the decedent was married at the time of death.

The **Aliases** tab will allow you to enter any other names by which the decedent was known. For example, William is often shortened to Bill. In this case, you would enter "William" in the **Decedent's Legal Name** tab, but "Bill" in the **Aliases** tab. Select the **Add/Edit Alias Names** link to launch a pop-up the window shown below. Click the New Alias button to proceed.

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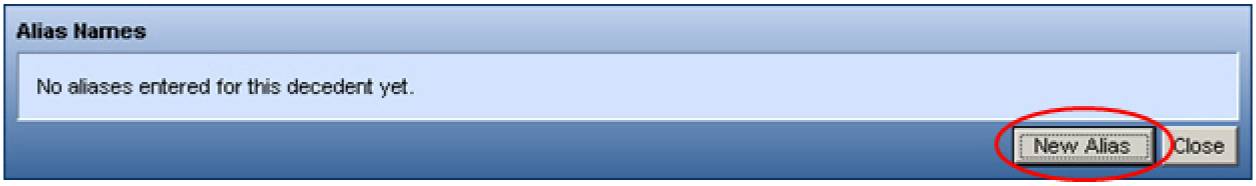
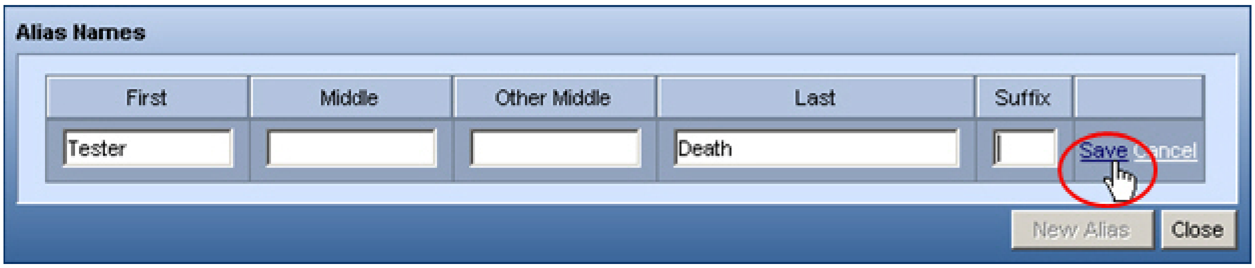
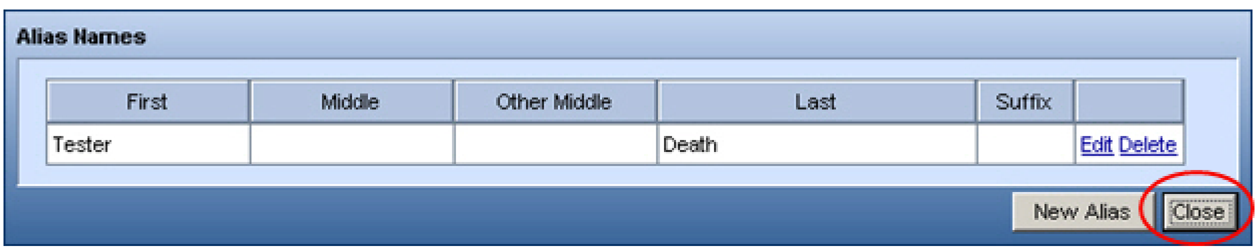


Enter the alias name using the **First**, **Middle**, **Other Middle**, **Last** and/or **Suffix** controls as needed. Select the **Save** button to save the new alias.



The page will refresh and display the new alias. Select the **Edit** link to change this alias, the **Delete** button to remove this alias from the system, or, if the decedent was known by more than one alias, the **New Alias** button to add another alias name. If there are no more aliases to enter, select the **Close** button.



The **Alias Names** window will close and the new alias will appear on the **Aliases** tab.

Gender – make a valid selection from the dropdown list.

Social Security Number – enter the decedent's social security number. It is not necessary to enter the hyphens between the 3rd and 4th numbers or the 5th and 6th numbers. Once you have tabbed out of this control the **DAVE™** system will automatically format the entry. Select the **None** radio button if the decedent does not

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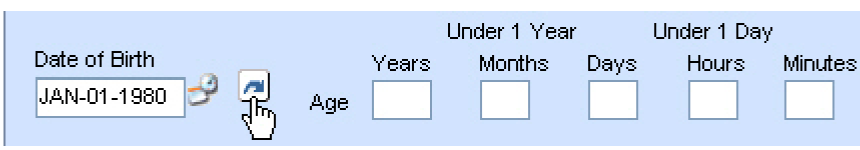
have an SSN. Select **Unknown** if the decedent has an SSN but it has not been provided.

SSN Verification Status consists of 2 controls: a Verify SSN link and a notification message. The **Verify SSN** link is used to notify the SSA that the decedent has passed and that any benefits currently being paid should be discontinued. Select the **Verify SSN** link to begin the notification process. Initially, the message displayed will be Unverified (0) with the number in parenthesis representing the number of attempts that have been made to contact the SSA. A maximum of 5 attempts can be made. If, after 5 attempts, verification cannot be established, the **Verify SSN** link will be disabled. If errors are detected, then a context sensitive message will displayed containing the information that needs to be corrected. Once verification has been completed, the message will change to **Verified**.

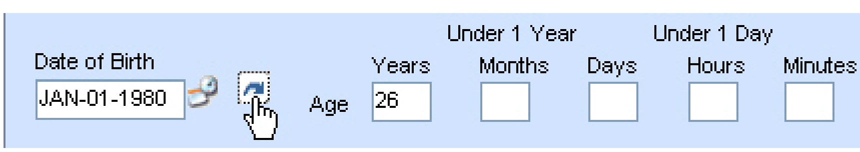
Using either the calendar control ( ) or manual date entry, key in the decedent's **Date of Birth**. Please see the **General System Navigation** section of this manual for more information on using calendar controls and date formats.

After keying in **Date of Birth**, select the auto-populate control ( ). Depending on the date of birth entered, **DAVE** will automatically calculate and display the correct age as follows:

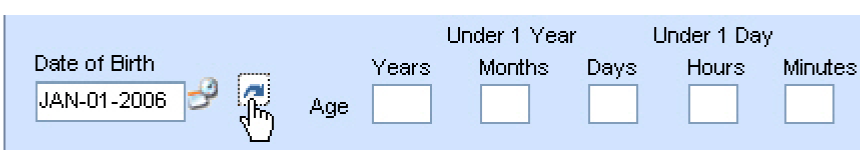
If the decedent was more than one year old at time of death…



…then the age in years will auto-populate in the **Years** control.



If decedent is **Under 1 Year** but more than 1 day old…



…then the age will auto-populate in the **Months** and **Days** controls.

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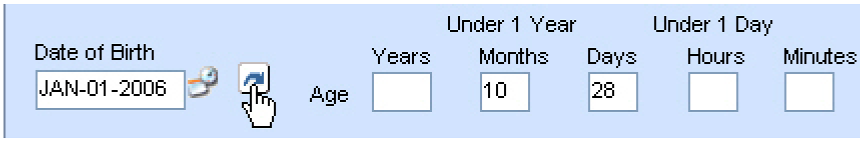
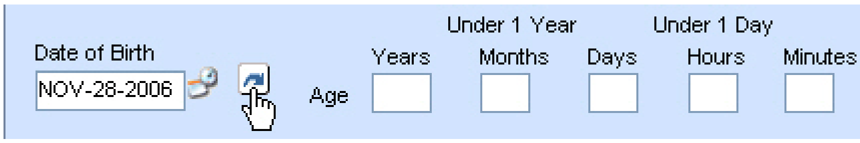


However, if decedent is **Under 1 Day** old…



…then selecting the auto-populate button will have no effect and manual entry of **Hours** and **Minutes** is required.

Use the **Decedent's Birth Place** tab control to capture the decedent's place of birth.

Lastly, make a valid selection from the **Ever in US Armed Forces?** dropdown list.

With all entries complete, use the **Validate Page** button at the bottom of the page to validate all entries for this record without leaving the page. Use the **Next** button to save your entries and proceed to the **Resident Address** page. Use **Clear** to clear all of your entries and start over. Use the **Save** button to save your data without leaving this page or validating any data. The **Return** button will return you to the **Main Menu**.

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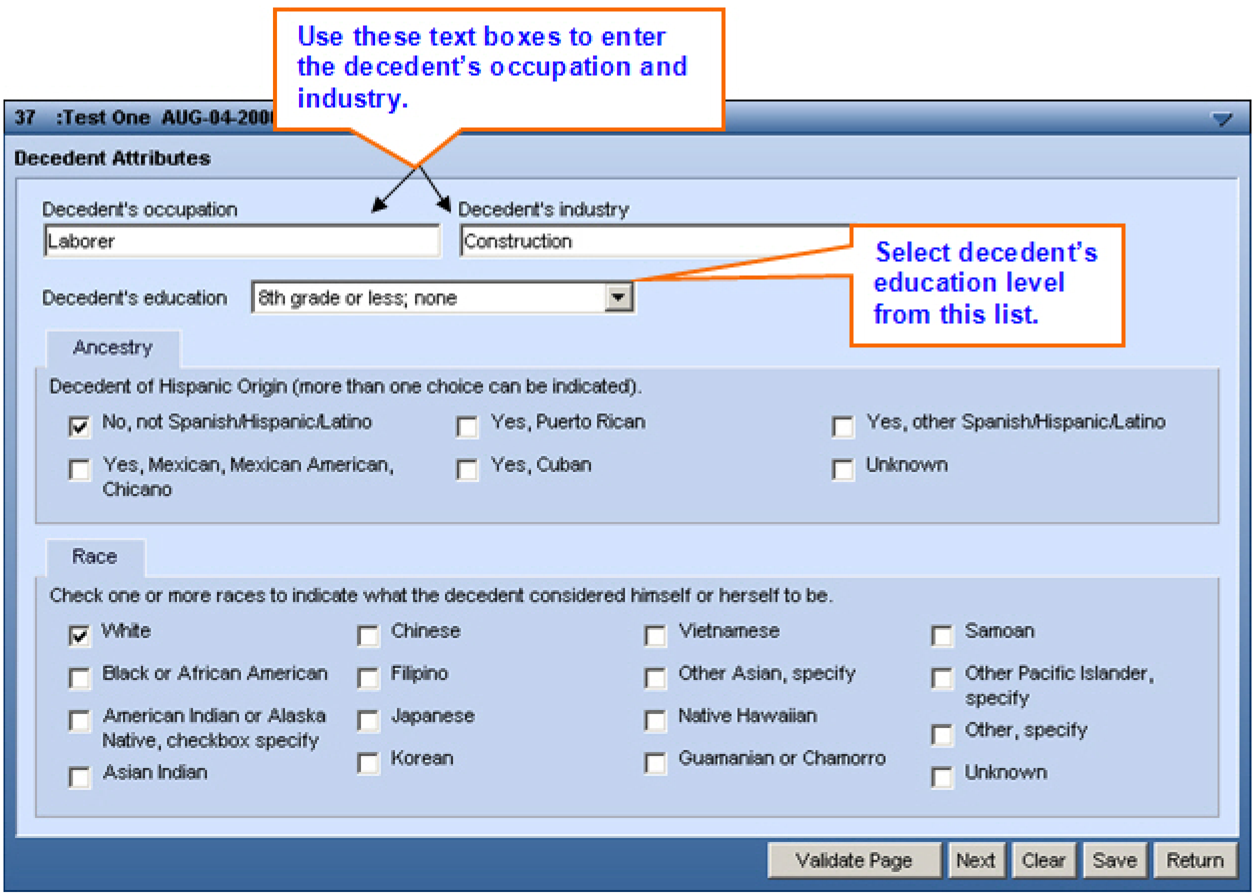
Decedent Attributes

The **Decedent Attributes** page is used to collect information relative to the decedent's occupation, education, ancestry and race. This is information that is vital to other state and federal agencies and can impact funding of various programs. Therefore, it is crucial that the information collected be as accurate as possible..

In the first two text entry boxes enter the **Decedent's Occupation** and **Decedent's Industry**. This information can be important in calculating work place mortality statistics and should be as specific as possible.

The **Decedent's education** dropdown provides a pick list of education levels to choose from. Again, this information may be used by other agencies within your state to determine funding for various programs and/or initiatives.



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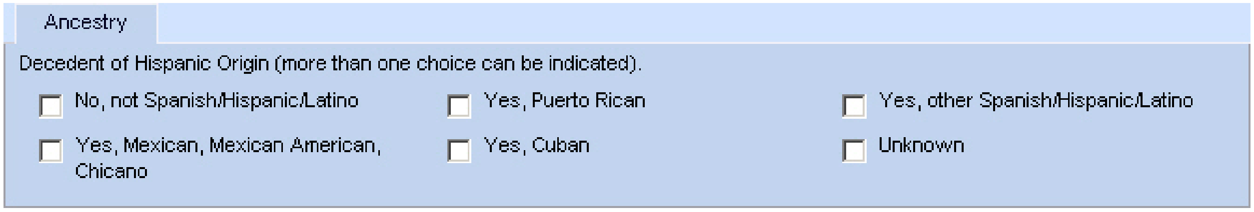
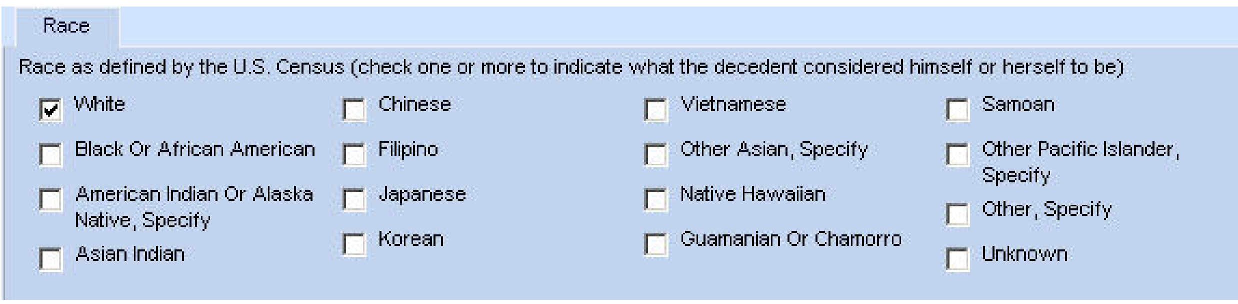
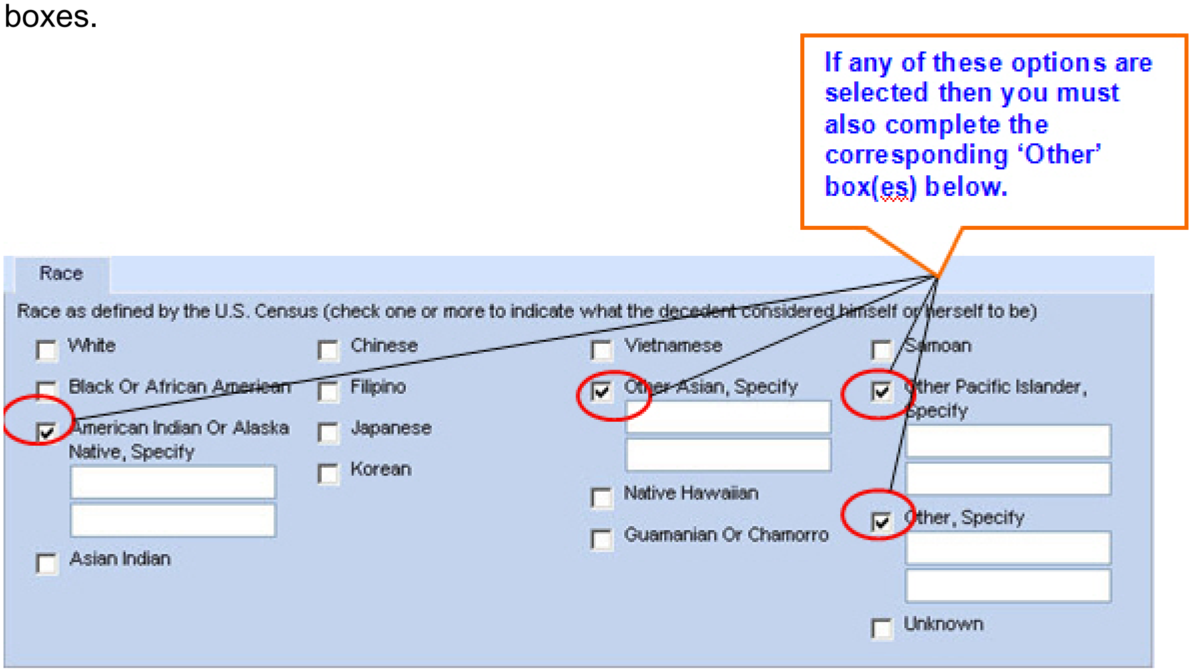
In the **Ancestry** tab select the one button that best describes the decedent. If unknown, select **Unknown**.



The next step in completing the **Decedent Attributes** page is to select at least one option from the **Race** tab. Note, if needed, you can select more than one race option.



Lastly, if **American Indian or Alaskan Native, Specify** or any of the **Other** options in the **Race** tab are selected then you must complete the corresponding **If Other** text boxes.



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Use the **Validate Page** button to validate all entries for this record without leaving the page. Use **Clear** to clear all of your entries and start over. Use the **Save** button to save your data without leaving this page or validating any data. The **Return** button will return you to the **Main Menu**.

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Medical Certification

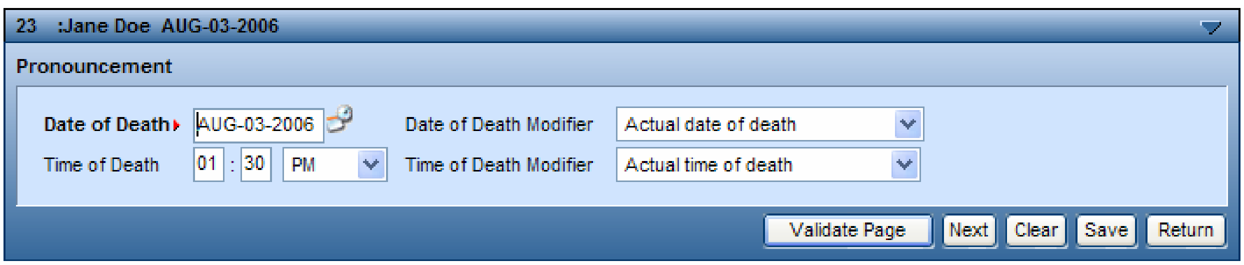
In the previous section we looked at **Personal Information** sub-menu pages. Those pages are used to collect information relative to the decedent. Now, we are going to take a close look at the **Medical Certification** sub-menu.

The **Medical Certification** sub-menu is, generally speaking, only available to Physicians, Medical Facility staff workers, and those Internal Staff members who have a need to review and/or edit the information found in these pages.

Pronouncement

The **Pronouncement** page is where the official date and time of death are recorded. Additionally, this page is also used to capture the pronouncer's information.

Under **Date and Time of Death** there are two entries to complete: **Date of Death** and **Time of Death**.



In the **Date of Death** field, enter the exact month, day and year that death occurred.

Use the calendar control ( ) or one of the valid **DAVE^{TM}** MM-DD-YYYY date formats. To enter the current date, just press your keyboard's 'f12' button key.

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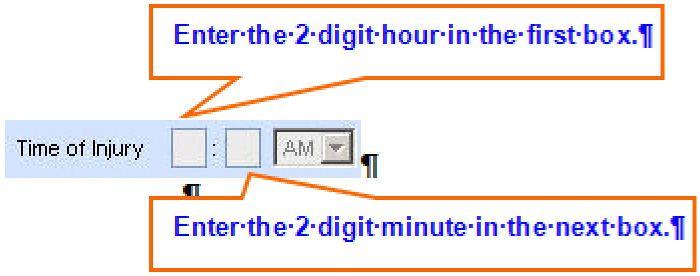
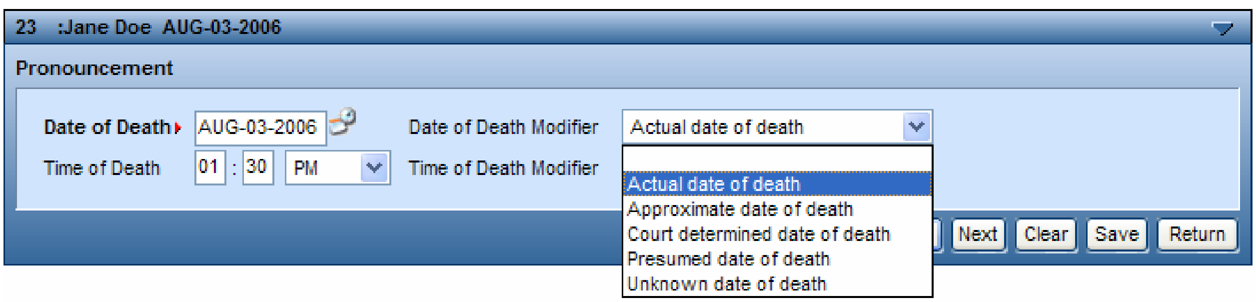
The **Time of Death** entry consists of 3 controls: 2 number entry boxes and one **AM/PM** dropdown list. In the first number entry box enter the 2-digit hour of the death. For example, if death occurred at 6:09 am, enter '**06**' in the first number box.

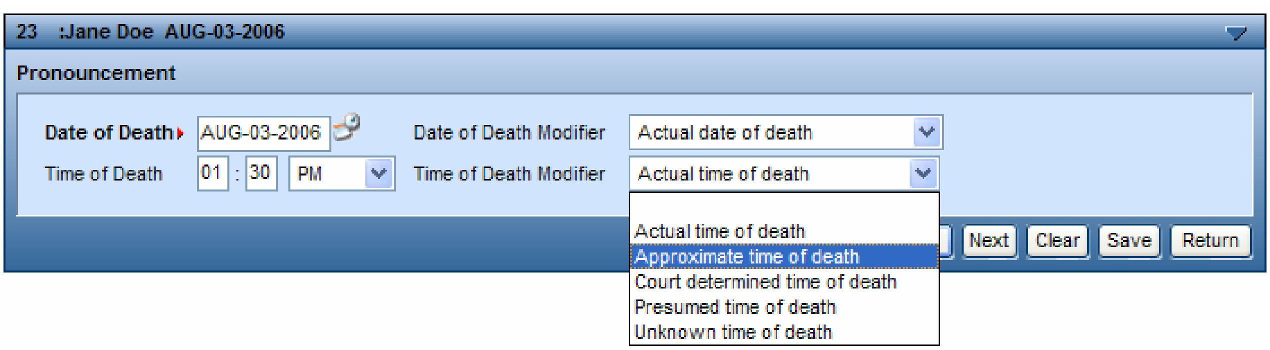


In the second number entry box enter the 2 digit minute at which death occurred. If death occurred at 6:09 am, enter '**09**' in the 2nd number box. To complete the **Time of Death** entry, make a valid selection from the **AM/PM/Military** dropdown list.

Complete the **Date of Death Modifier** by selecting a death registration death date *type*.



Next, complete the **Time of Death Modifier** by selecting a death registration death time *type*.



Lastly, use the **Validate Page** button to validate all entries for this record without leaving the page. Use **Clear** to clear all of your entries and start over. Use the **Save** button to save your data without leaving this page or validating any data. The **Return** button will return you to the **Main Menu**.

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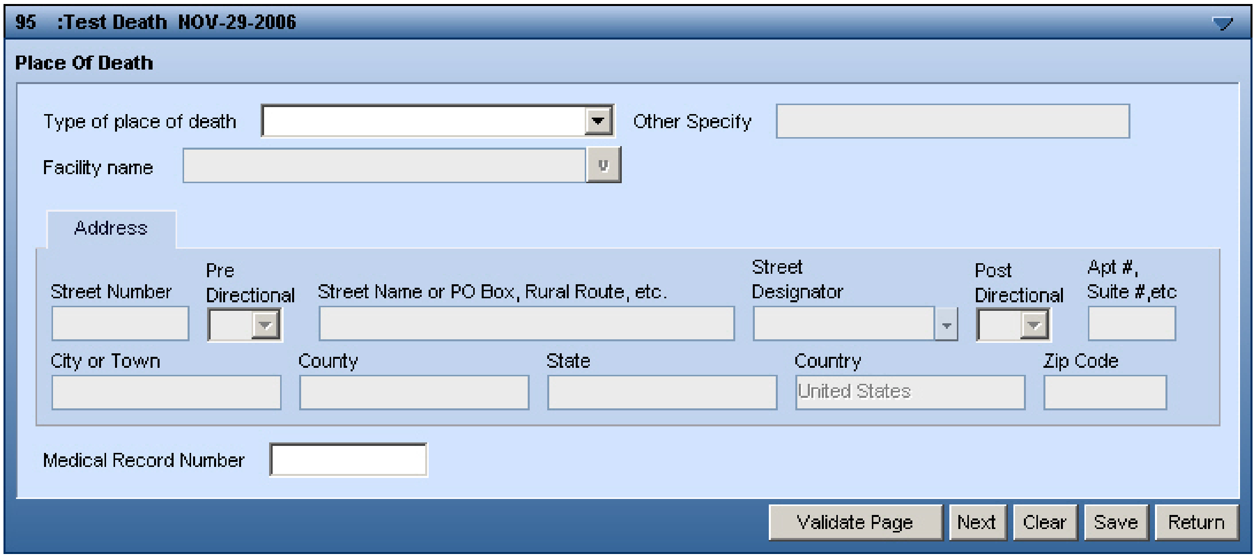
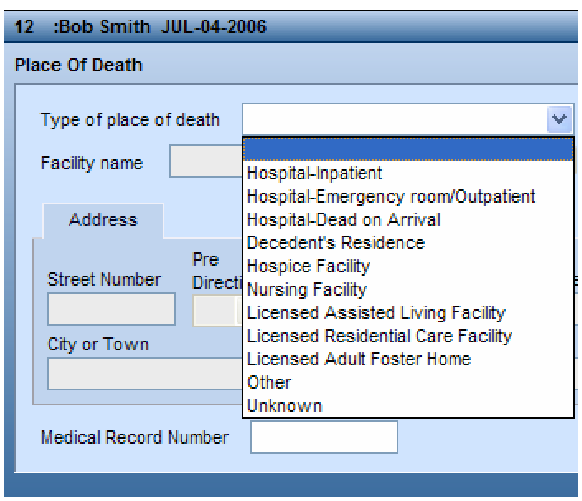
Place of Death

The **Place of Death** page is used to capture data relative to where the decedent actually passed away. This could be a hospital, home address or other location.



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



Next, use the **Lookup** control () to choose the actual facility where death occurred. The Places provided in the Lookup control are filtered based on the place Type selected above.

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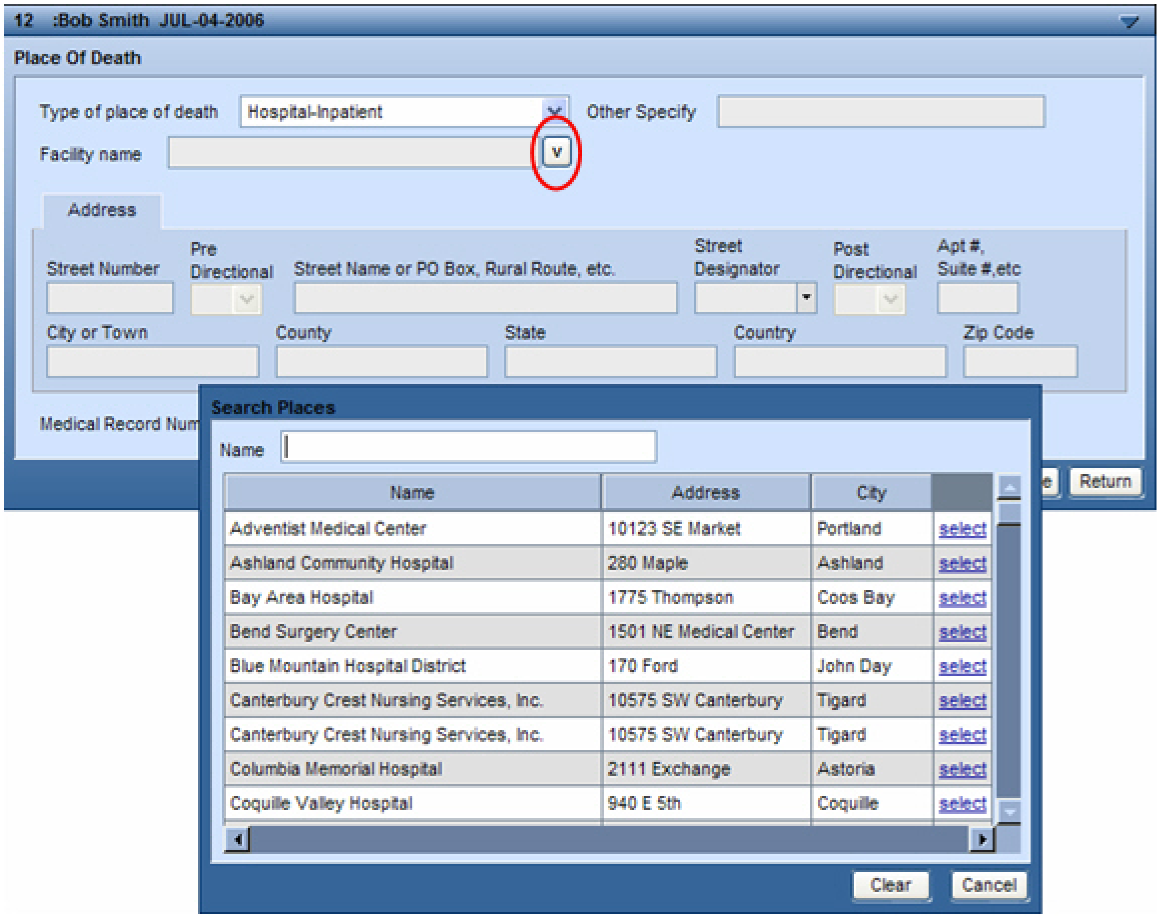

Click the **Select** link to add a facility. Notice that the **Facility**'s information automatically populates the page controls:

If you had select **Other** from the **Type of place of death** dropdown list then you must also fill in the **Other Specify** and manually complete the **Address** tab control.

Lastly, complete this page by adding a **Medical Record Number**, if one exists. This is not a mandatory entry.

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

Use the dropdown **list to select the type of place of death and the lookup control (v) to fill in the facility's data.**

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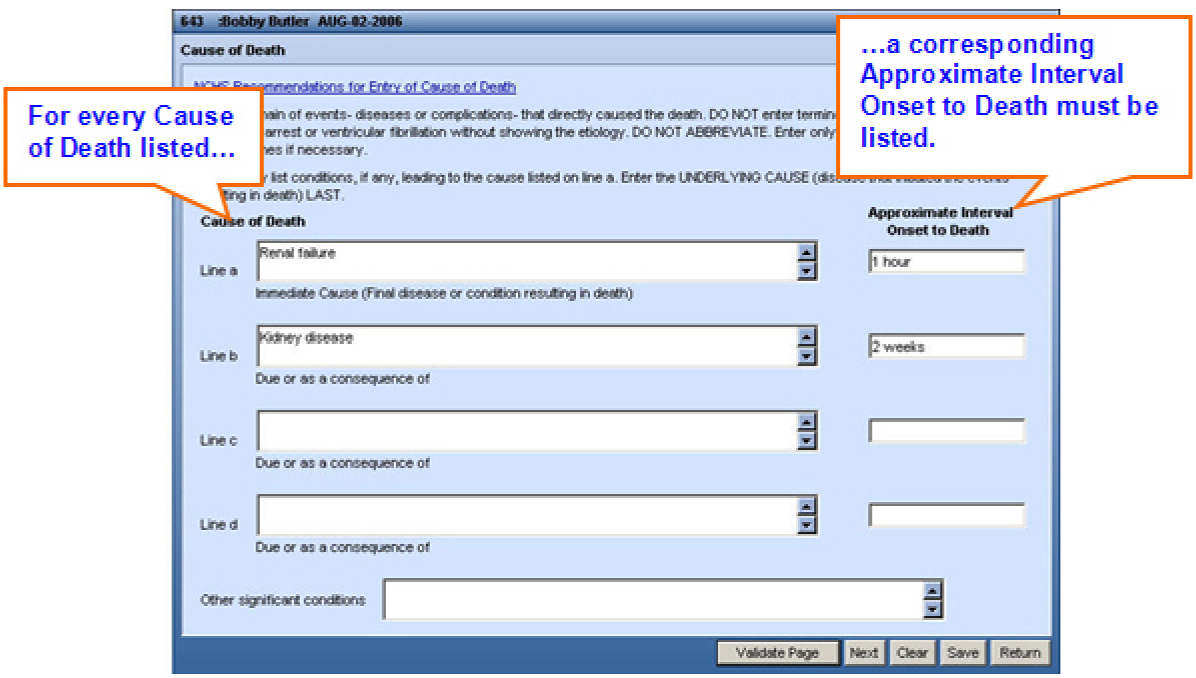
Cause of Death

The **Cause of Death** page is used to describe the conditions under which the decedent died. Attention to detail and specificity is essential when completing this page. The cause of death as listed will be used by various state agencies to track everything from workplace safety to the spread of contagious diseases.

Using the **Cause of Death** text boxes the pronouncer enters the cause(s) of death, the interval onset to death and any other contributing factors.

Notice that there are 4 **Cause of Death** text boxes. To the right of each Cause of Death text box there is a corresponding **Approximate Interval Onset to Death**. For each cause of death listed in Lines a-d, an approximate interval between onset and death must be filled in.



Again, be as specific as possible, using as many of the lines a-d necessary to give a complete picture of the cause(s) of death. You do not have to use every line on the page, but any lines you do use must be filled in sequentially. You cannot complete **Line a** and move to **Line c** without first completing in **Line b** as well.

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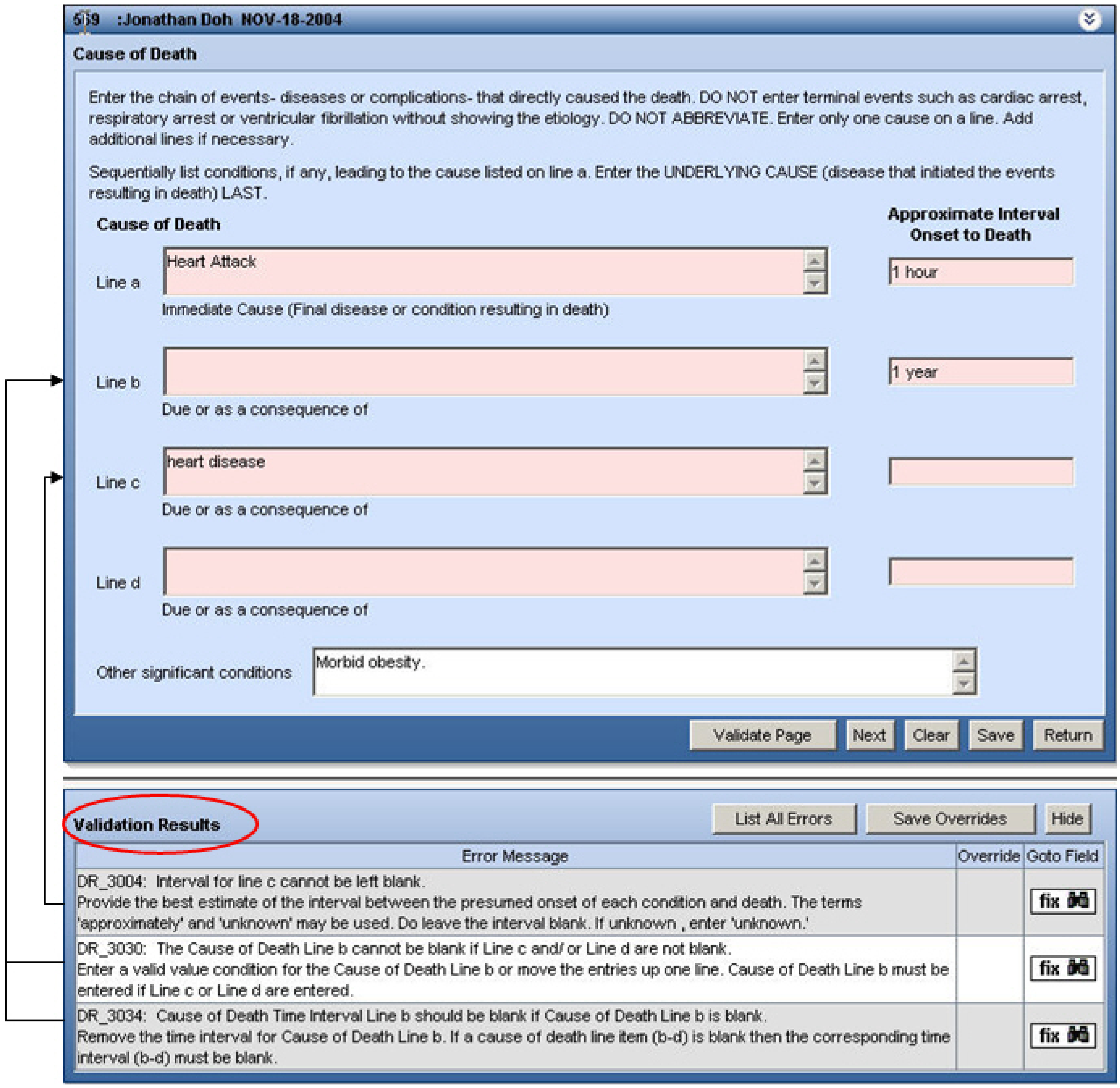
Listed below in the **Validation Results** window are some of the errors you might run across while completing the **Cause of Death** page.



DR_3004 was caused by leaving the **Approximate Interval Onset to Death** box empty, even though a cause of death was listed in **Line c**.

DR_3030 was caused by listing an **Approximate Interval Onset to Death** in **Line b** without a corresponding cause of death.

DR_3034 indicates that the **Approximate Interval Onset to Death** box should be blank if the corresponding cause of death line is also blank. As you can see, some errors can generate multiple error messages.

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Notice that all of these errors create hard edit failures, indicated by red shading, indicating that these errors must be corrected before the record can be certified.

Other errors can be caused by using abbreviations or by not being specific enough in describing the cause of death.

Use the **Validate Page** button to validate all entries for this record without leaving the page. Use the **Next** button to save your entries and proceed to the next page. Use **Clear** to clear all of your entries and start over. Use the **Save** button to save your data without leaving this page or validating any data. The **Return** button will return you to the **Main Menu**.

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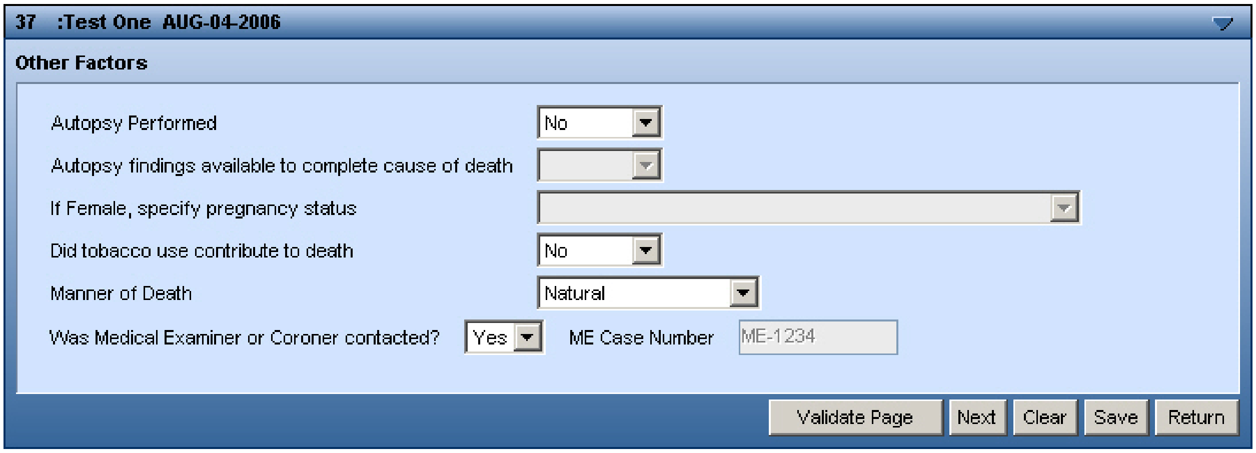
Other Factors

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



From the **Autopsy Performed** dropdown list select either **Yes** or **No**, accordingly.

If **Yes** is selected from **Autopsy Performed**, then you must make a selection from the **Autopsy findings available to complete cause of death** dropdown list.

Complete the **If Female, specify pregnancy status** section

Select **Yes**, **No**, **Probably**, or **Unknown** from the **Tobacco** use dropdown list.

Complete the **Manner of Death** section

Finish the page by making a selection from the **Was Medical Examiner or Coroner contacted?** dropdown list and, if applicable, entering a case number in the **ME Case Number** field.

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

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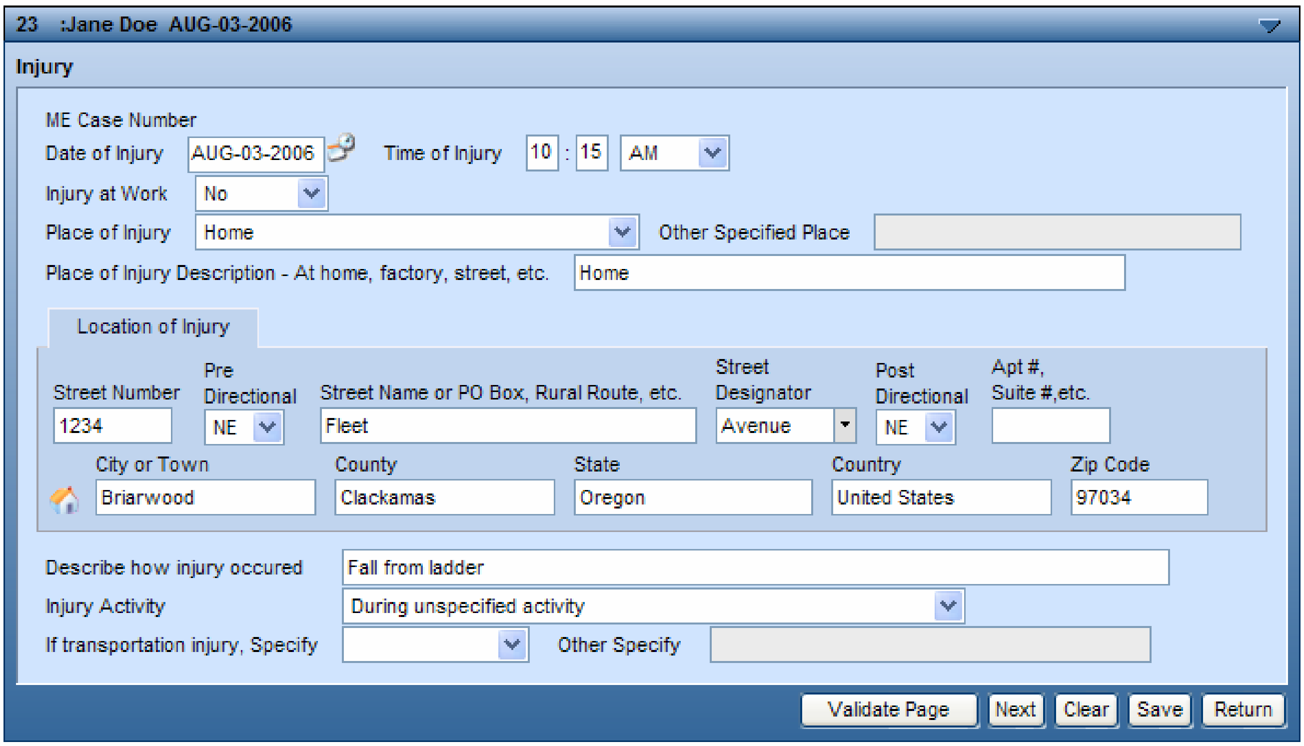
Injury

If you are logged in as a Medical Examiner or an Internal Office User AND the decedent died of non-natural causes, then you will need to complete the **Injury** page.

The **Injury** page, shown below, will only be displayed if the manner of death was accident, homicide, or suicide.



Place date fatal injury occurred in the **Date of Injury** control, without respect to actual date of death.

Place time fatal injury occurred in the **Time of Injury** control, without respect to actual time of death.

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

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

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

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

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Provide the circumstance surrounding the injury in the **Describe how injury occurred** text box control.

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

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

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

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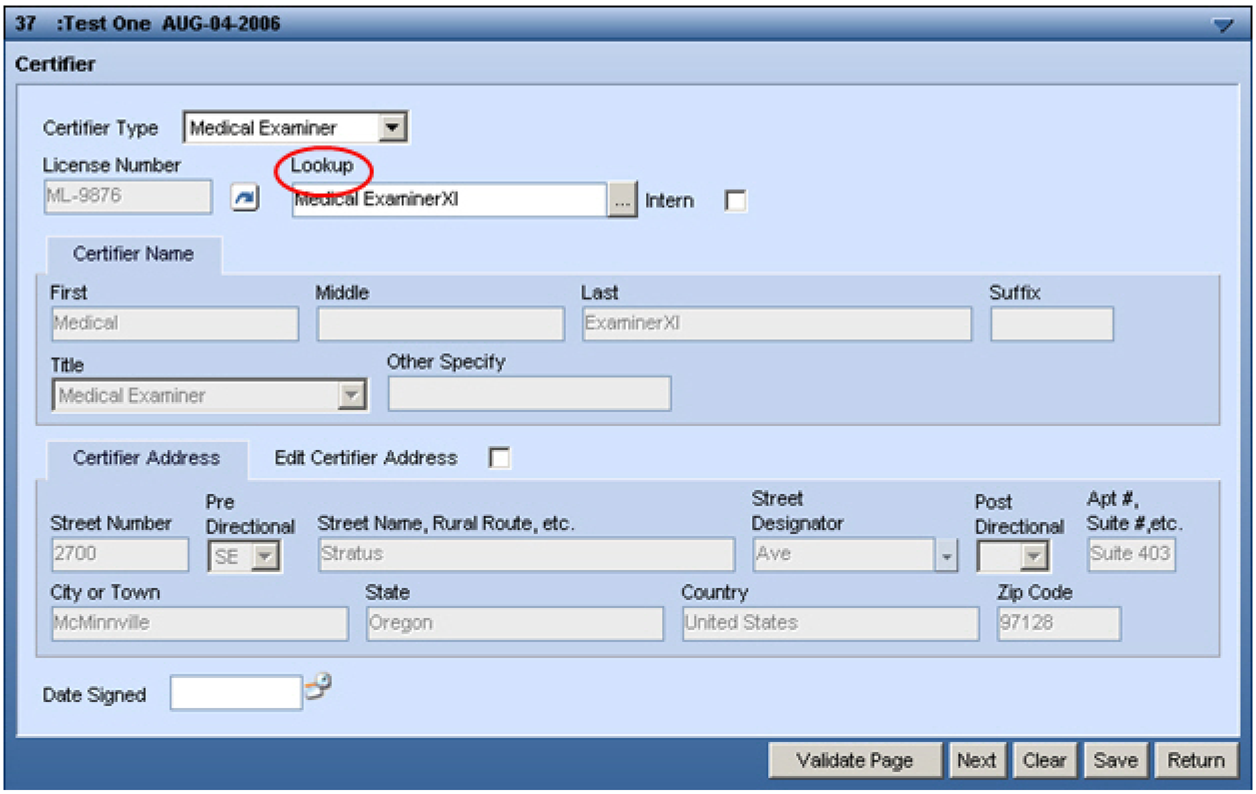
Certifier

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

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



Make a selection from the **Certifier Type** dropdown list. **Certifier Type** represents the role the certifier played in completing the case. If the certifier provided the cause of death only, select **Certifying Physician**. If certifier also pronounced death (provided date, time and place of death) select **Pronouncing and Certifying Physician**. If death registration was completed by a medical examiner, select **Medical Examiner/Coroner**.

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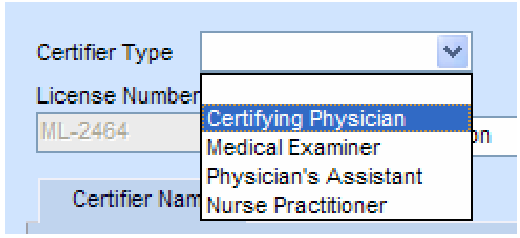
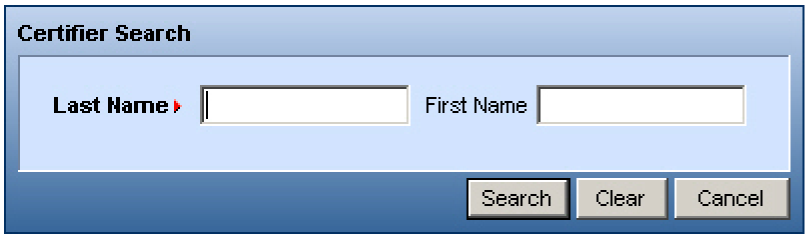
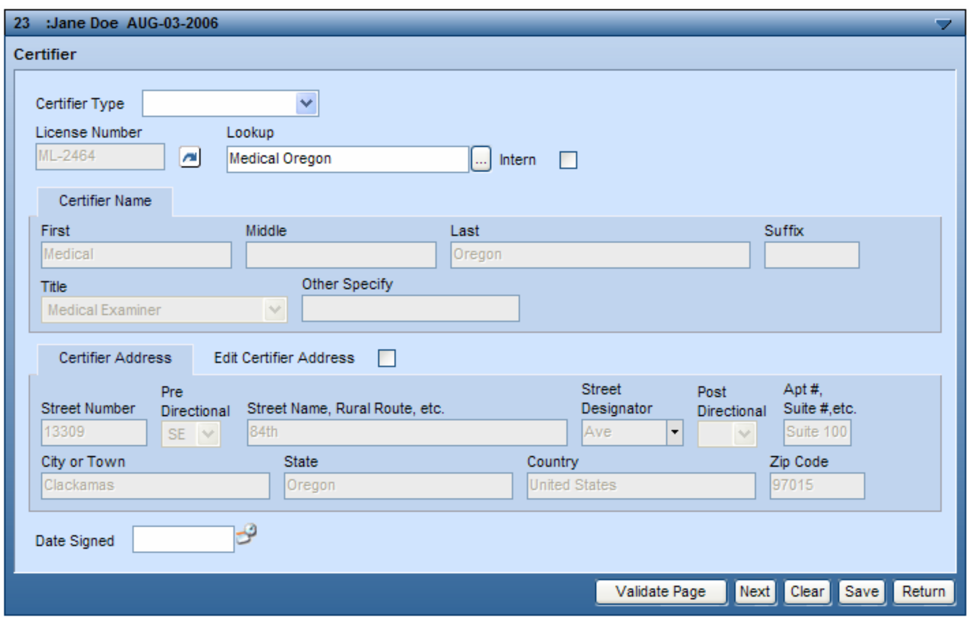


Click on the **Lookup** button to key in the certifier's Last and First name:



After accessing the correct certifier, click the **Select** link to auto-populate **Certifier Name** and **Certifier Address** tab controls.



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

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The **Date Signed** control will be system filled upon successful Biometric Authentication by the certifier.

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

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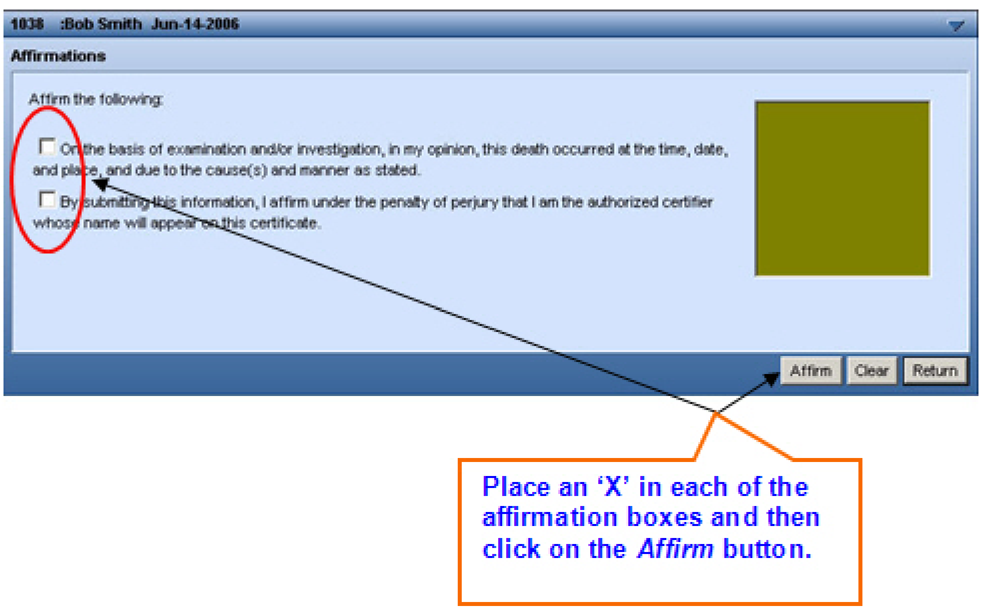
Certify

An affirmation is used to record the fact that the medical certifier is accepting legal responsibility for the accuracy of the information provided. In many jurisdictions these are legally binding statements made under the penalty of perjury. In the **DAVE**[TM] application, these affirmations are validated through Biometric Authentication.

The **DAVE**[TM] application uses fingerprint verification for **Biometric Authentication**. Before a user may electronically sign a certificate, the user must complete a biometric enrollment process. This process involves the identity verification of the user and then the capture of one or more fingerprints. These samples are stored in the **DAVE** database in a "biometric template" and are used for future comparison during authentication. Once enrollment and storage are complete, the **DAVE** application authenticates a user by matching the template against the current fingerprint scan. Comparison of the current scan and the template results in a simple binary yes/no match.

To access the **Certify** section, select **Death Registration Menu -> Medical Certification** sub-menu, then select **-> Certify**.

To **Certify** a death record, place a checkmark in the **Affirm the following:** checkbox(es) and click the **Affirm** button.



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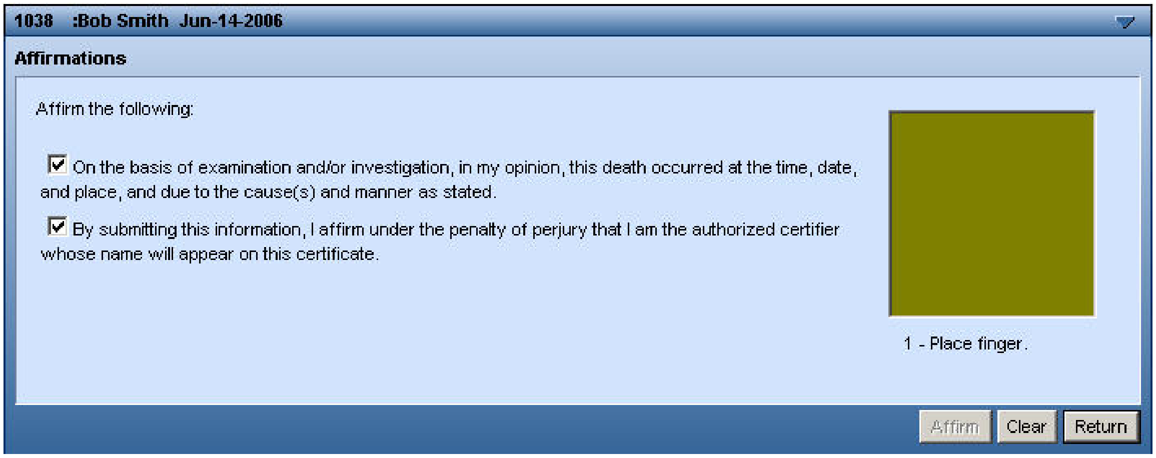
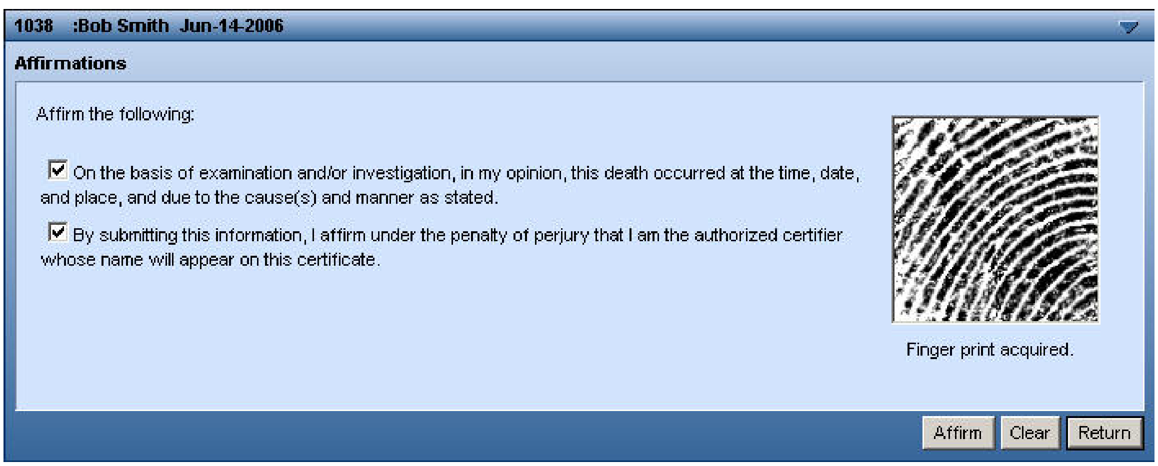
Selecting the **Affirm** button will cause the page to refresh and the instruction **1 – Place finger** to display.



Place a biometrically enrolled finger on the fingerprint scanner. The scanner will 'read' your fingerprint and display it onscreen. Once the fingerprint has been read the message Finger print acquired will be displayed.



If the fingerprint could not be read, an error message will be displayed.

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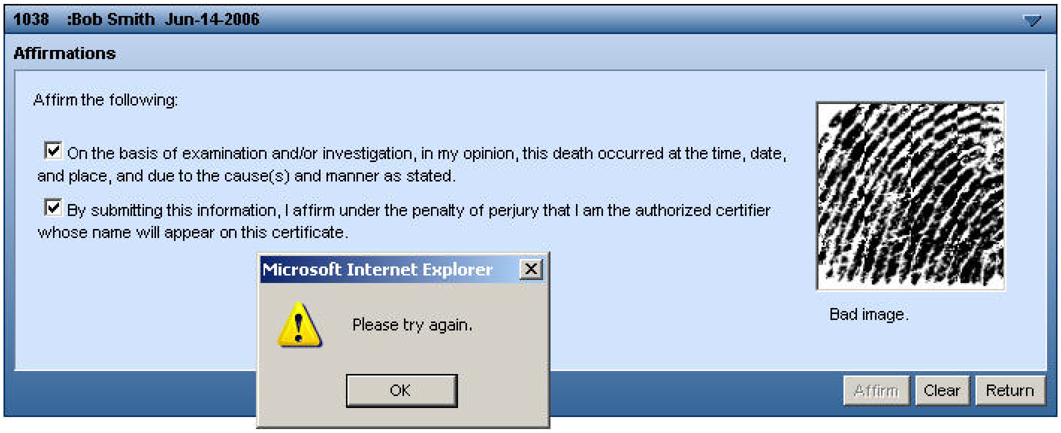
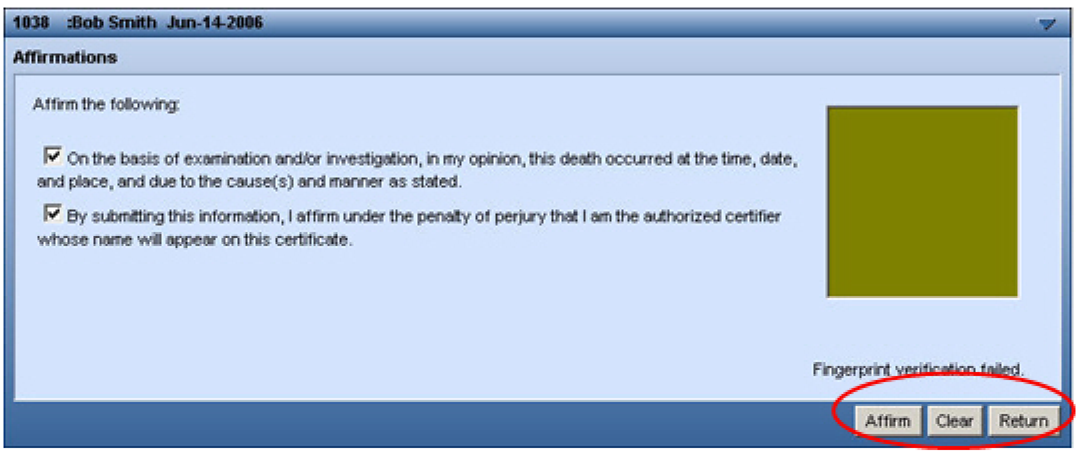
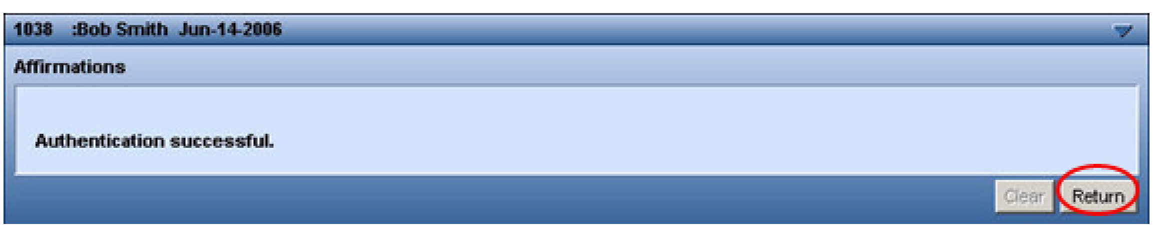


If the fingerprint could be read, but did not match any prints on record, a different error will appear:



If the fingerprint can be read and matched to a user enrolled print in the DAVE database then the record will be officially signed/affirmed and an **Authentication Successful** message displayed:



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

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Other Links

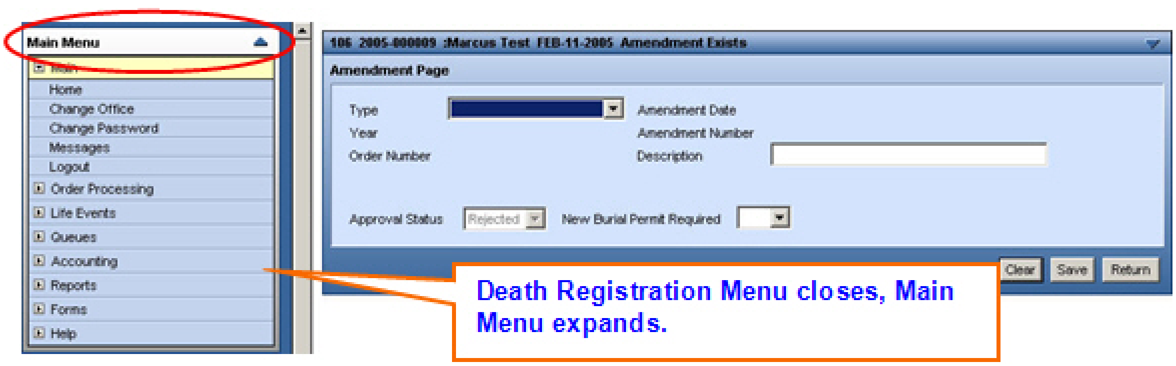
Amendments

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

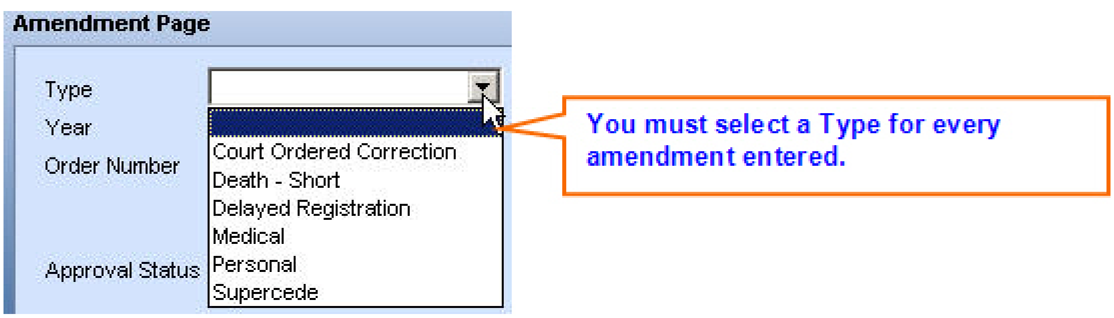
To access the **Amendments** link, select **Other Links -> Amendments**.

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

Notice that when the **Amendments** link is selected, the **Death Registration Menu** is removed from the page and only the **Main Menu** is displayed.



The first step in processing an amendment is to select an amendment **Type** from the dropdown list:



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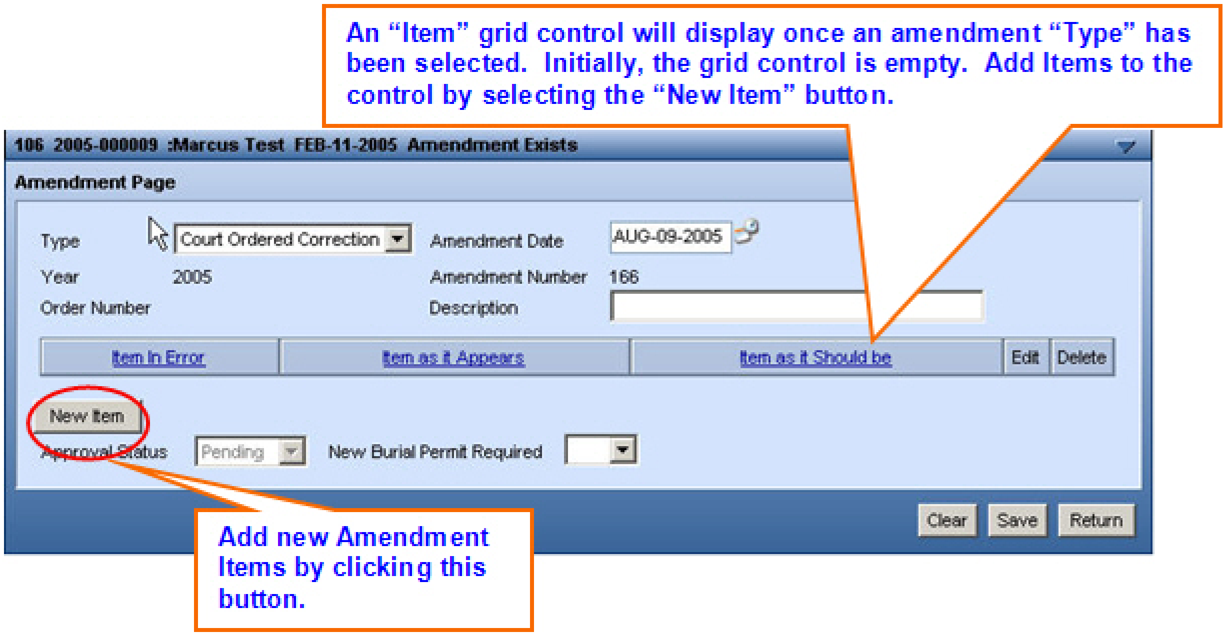
Add a description of the amendment in the **Description** text entry control and click **Save**.



The page will refresh and the **Amendment Date** calendar control will automatically fill in with the current system date. In addition, new controls appear onscreen. These controls consist of an **Item** grid control, a **New Item** button, an **Approval Status** control, and a **New Burial Permit Required** dropdown list.

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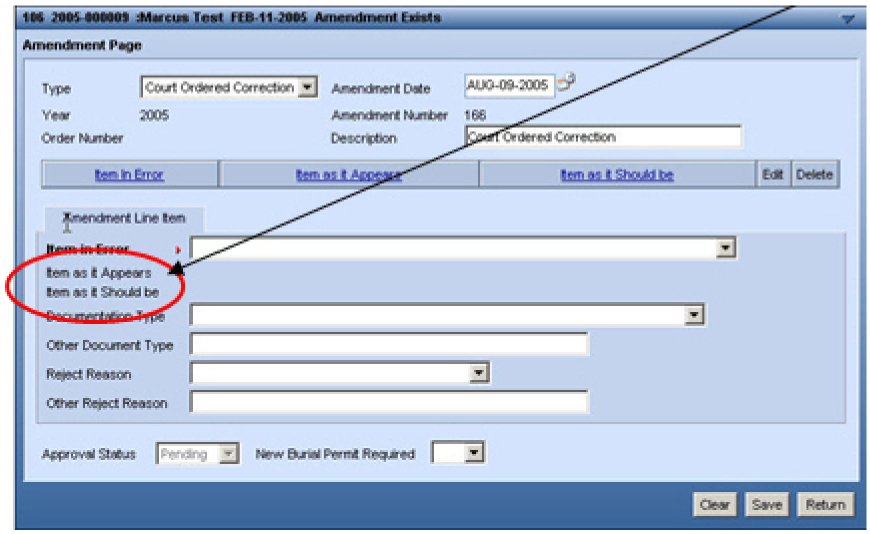
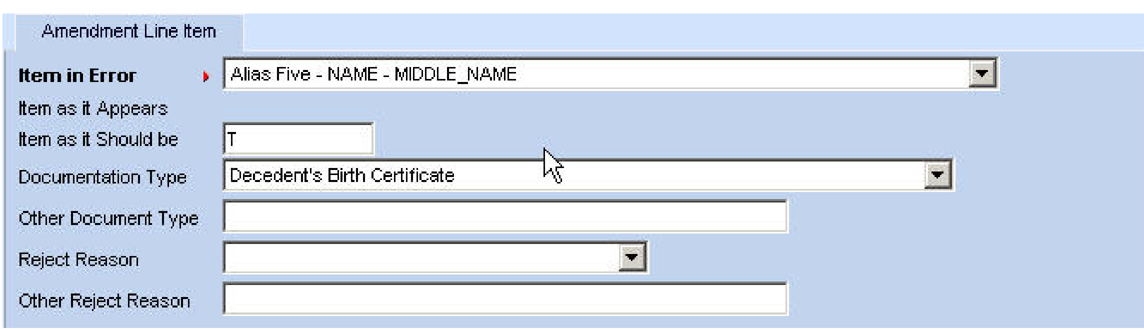
Next click the **New Item** button to refresh the page and display the **Amendment Line Item** tab. From the **Item In Error** dropdown list, select the item on this record that needs to be amended. This will cause line item tab to refresh, displaying the **Item As It Appears** and the **Item as it Should be** controls.



The **Item As it Appears** control will display the current value of the item to be changed. If there is no current value, then it will remain blank. In either case, place the desired value in the **Item As it Should** be text box.

From the **Documentation Type** dropdown list, select the category that best describes the documentation being used to justify the amendment. If the documentation type does not appear in the list, manually type it into the **Other Documentation Type** text control. To save the amendment, click the **Save** button.



The **Amendments** page allows the user to add multiple amendments to a record. If one of those amendments needs to be rejected, then select the amendment from the **Item In Error** list, select a reject reason from the **Reject Reason** dropdown or, if the reason is not included in the dropdown list, enter the reason in the **Other Reject Reason** text box.

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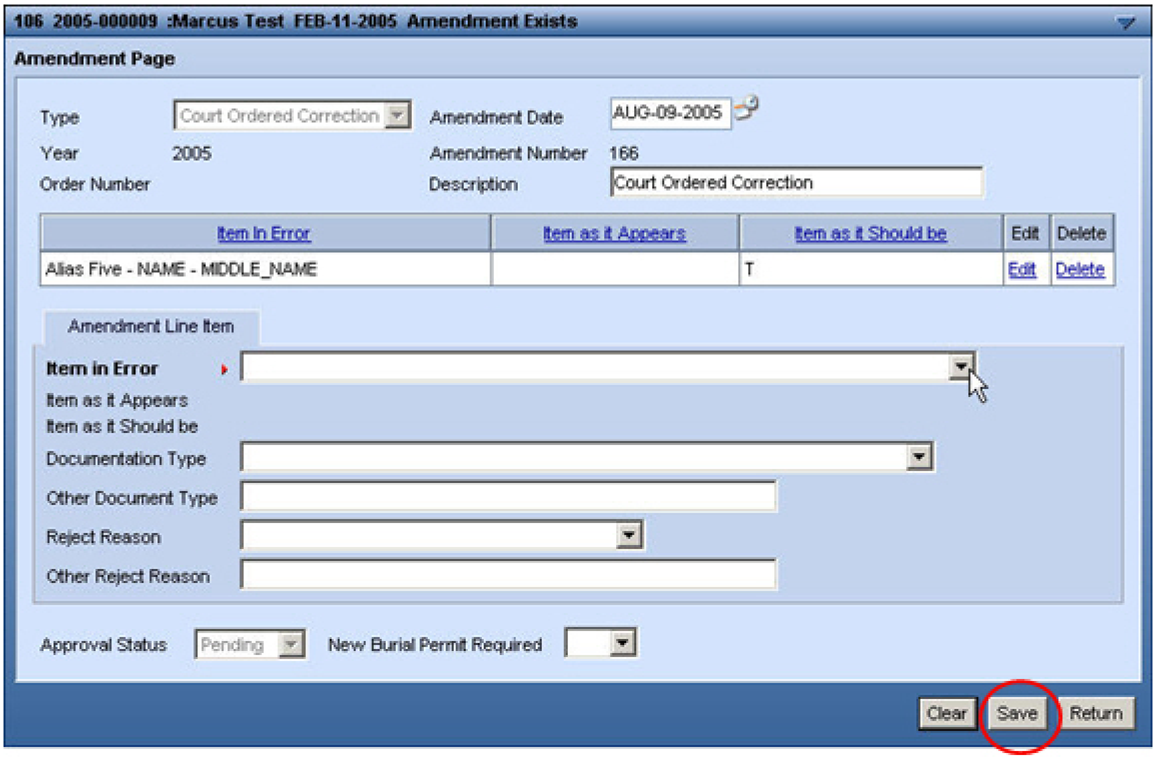
Approval Status is automatically filled in with a status of **Pending**. The next page in the amendment process, the **Amendment Processing History** page, is used to accept and finalize the amendments.

If a new burial permit is required as a result of this amendment, select **Yes** from the **New Burial Permit** dropdown list. Otherwise, set it to **No**. If Yes is selected then you will need to check the **Expedited Permit Required** box on the next page: **Amendment Processing History**.



Click the **Save** button. The page will refresh and display the new **Amendment** with a **Pending** status.

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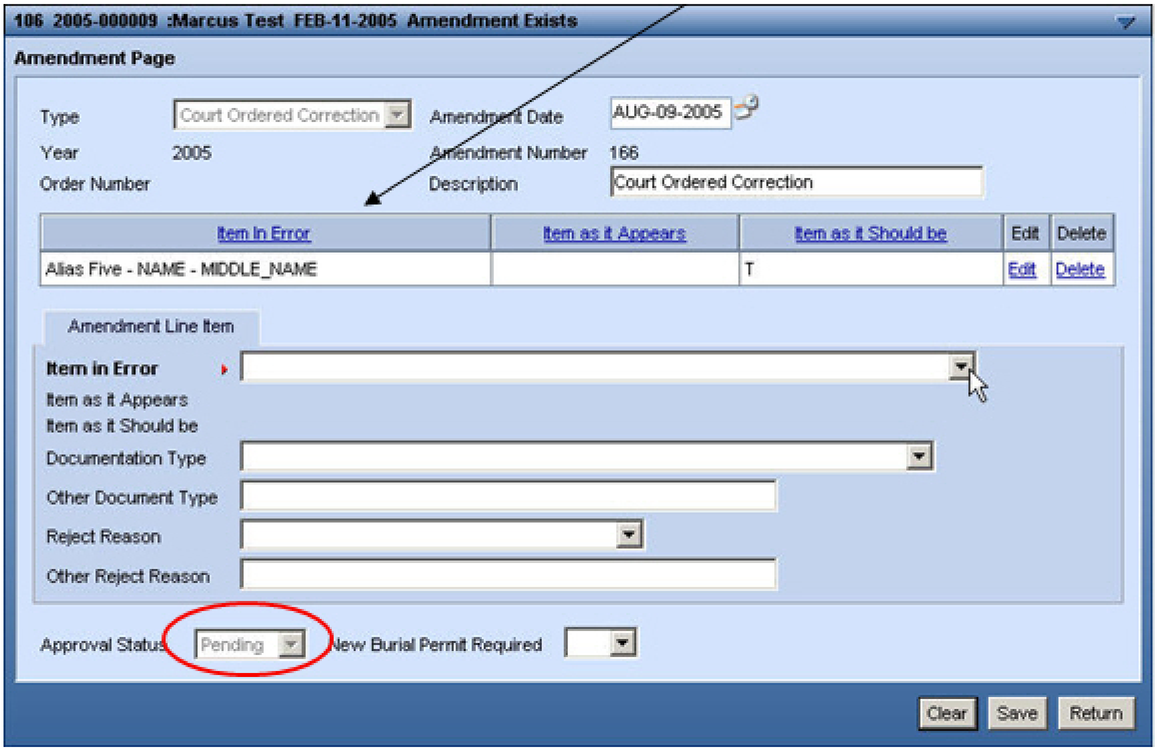
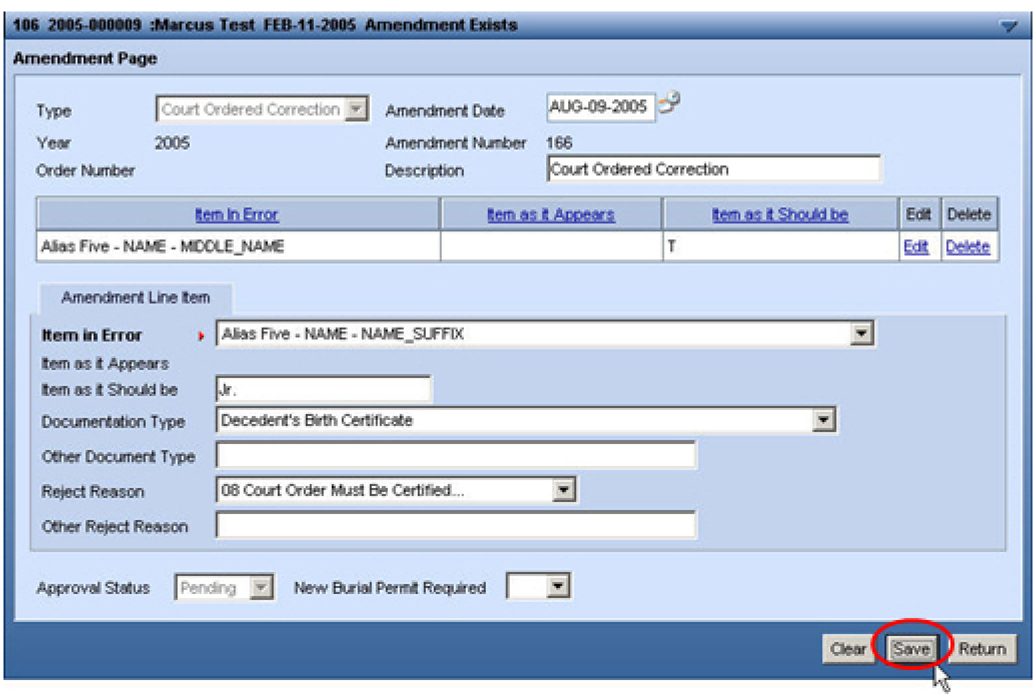
Notice that an amendment item now appears in the **Item** grid control.



Continue adding items by filling in the **Amendment Line Item** tab and clicking the **Save** button with each item added.



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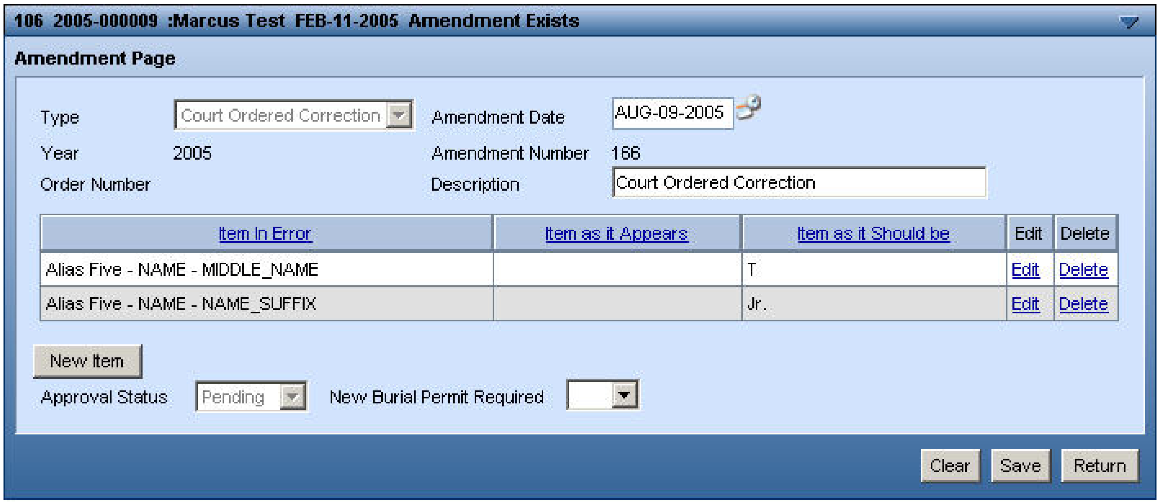
Notice that the **Item** grid control now displays two Amendments to this death registration.



Use the **Clear** button to clear all entries related to the current amendment being added, the **Save** button to save the amendment to the **Item** grid or the **Return** button to close this page and return to the **Death Registration Menu**. When all amendments have been entered and are displayed in the **Item** grid, select **Amendment Processing History** from the **Amendments** menu to proceed to the next step.

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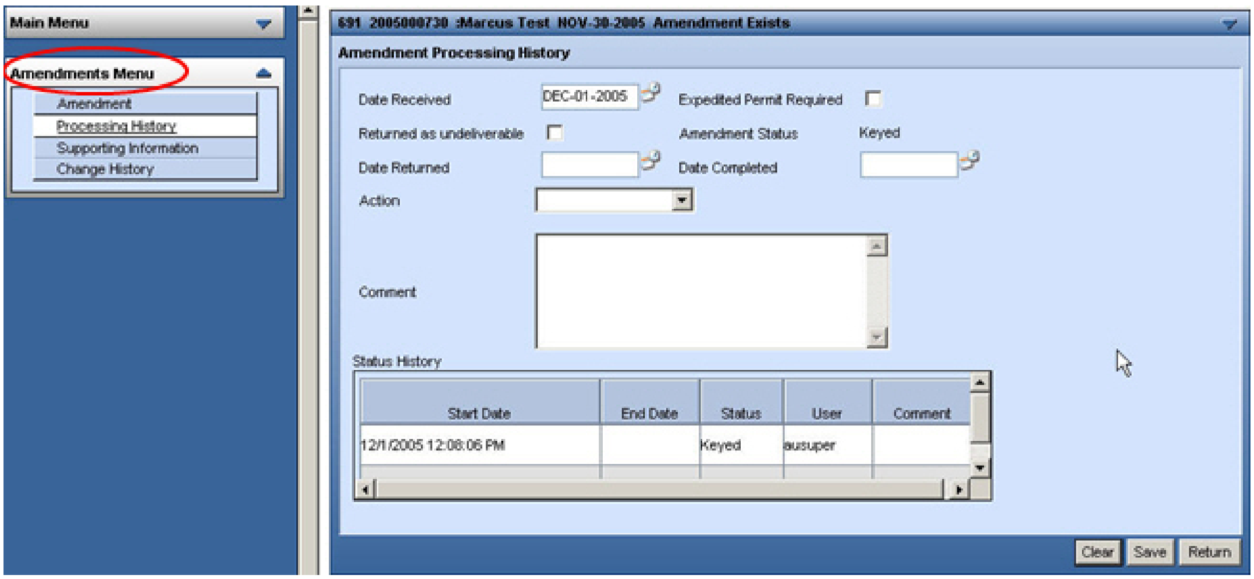
Amendment Processing History

The **Amendment Processing History** page is setup to support the processing of paper amendment requests.

Notice that the **Main Menu** collapses and the **Amendments Menu** opens.



Date Received is system filled with the current system date. However, this field is editable and can be changed if necessary.

If **New Burial Permit Required** on the **Amendment Page** above was set to yes, then a checkmark will automatically be placed in the **Expedited Permit Required** box.

Many times requests for amendments are made that cannot be granted. In these cases, a rejection notice is mailed to the individual(s) requesting the change. If the notice of rejection is returned by the USPS as undeliverable, then a checkmark should be placed in the **Returned As Undeliverable** checkbox. Also, complete the **Date Returned** control to indicate the date on which the rejection letter was returned.

Amendment Status is a system filled, non-updateable field. When an amendment request is first entered, the status defaults to **Keyed**. As the amendment is processed the status will change accordingly.

Date Completed will be auto-filled with the date the amendment was either approved or rejected.

From the **Action** dropdown list, select **Data Entry Complete**. Available actions include **Approve**, **Reject**, **Data Entry Complete**, etc… However, not all actions are available at all times. The first **Action** to be taken should always be **Data Entry Complete**.

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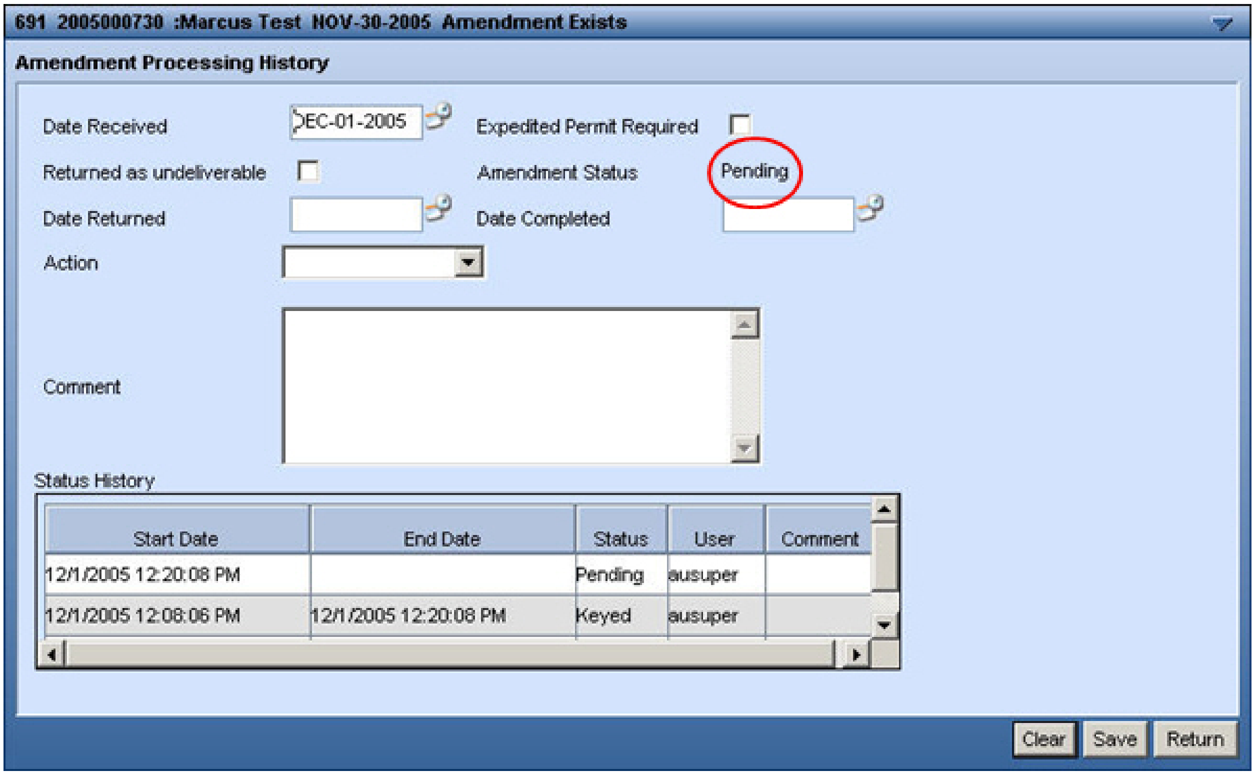
Then, as the amendment is processed further, additional actions will be available. At each step in the amendment process a valid action must be assigned.

Click the **Save** button. The page will refresh. Notice that the status has now changed to **Pending**.



While it is not necessary to enter a **Comment** as part of the amendment process, it is recommended. Detailed comments can provide much needed information to the next user working on the amendment and can help eliminate needless rejections or invalid approvals. To add a comment, simply click anywhere inside the **Comment** text box and being keying in your comment.

The **Status History** table provides an ongoing listing of all amendments and their respective statuses. No entry into this field is needed (or possible.) The table automatically updates each time an amendment status changes. Compare the screenshot in step 1 to the screenshot in step 13 and you will notice that the **Status** changed from **Keyed** to **Pending**.

Use the **Clear** button to clear onscreen entries related to the amendment, the **Save** button to save changes and update the **Status History** table or the **Return** button to close the **Amendments Menu** and return to the **Death Registration Menu**.

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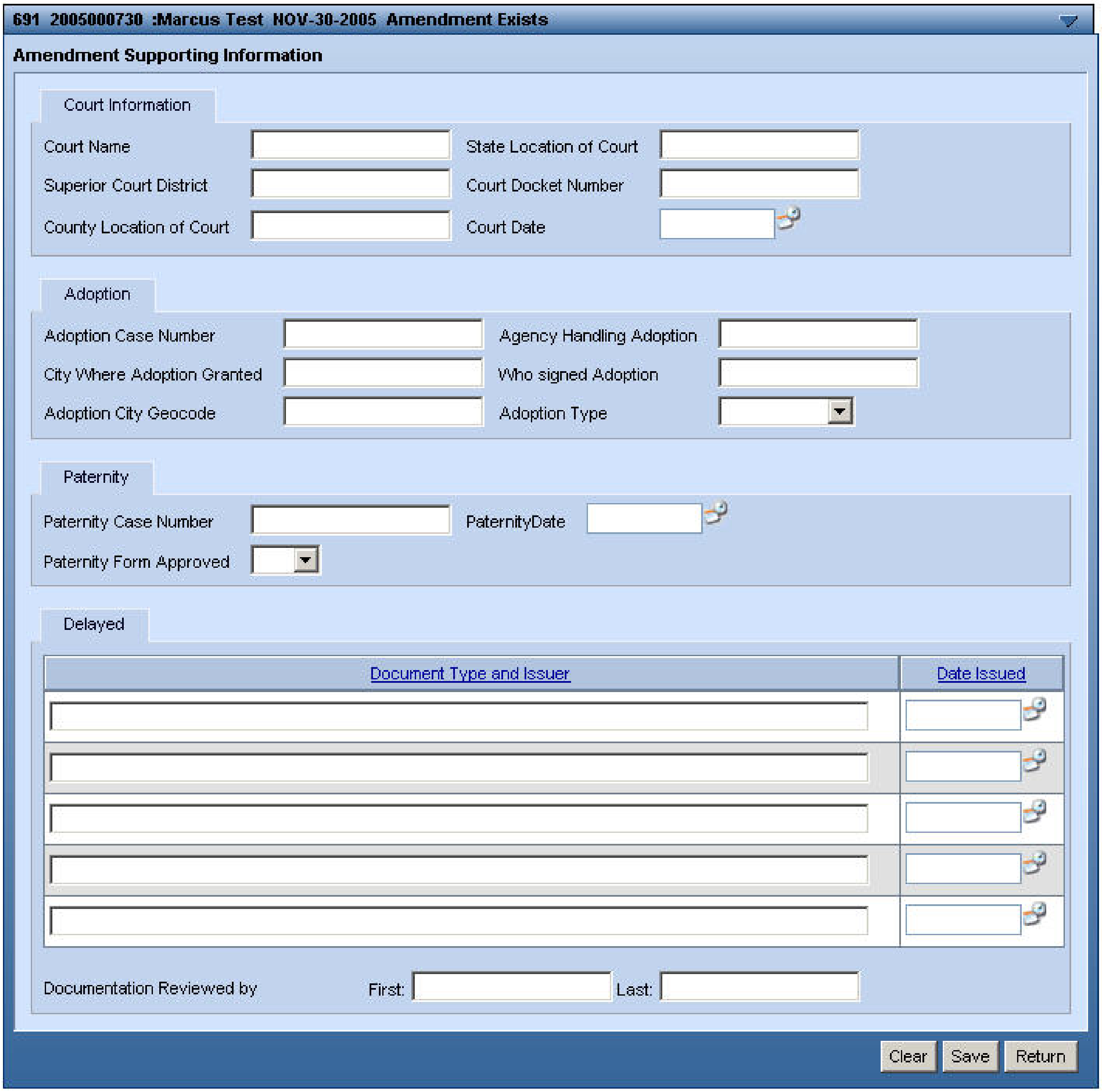
Amendment Supporting Information
All amendments to paper death certificates require either examination of documentation, or the retrieval of a copy of the original certificate. The Amendment Supporting Information page is used to capture types of supporting documentation used justify the amendment.

From the **Amendments Menu**, select **Supporting Information**:



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For court ordered amendments or other amendments that required judicial intervention, complete the **Court Information** tab. For the purposes of this exercise, complete this tab with information relevant to your jurisdiction.

If applicable to processing the amendment, complete the **Adoption** tab as well.

For amendments related to paternity, complete the **Paternity** tab by providing the case number, date filed, and indicate if the paternity form was approved by selecting **Yes** or **No** from the **Paternity Form Approved** dropdown list.

If the a registration filing is delayed beyond the registration time limit, the that death registration is said to be delayed. The **Delayed** tab is used to capture the documentation used to support the filing of a delayed death. For each piece of documentation listed, an **Issuance Date** must also be included.

Also part of the **Delayed** tab is the **Documentation Reviewed by** control. Here, the **First** and **Last** name of the person reviewing the supporting documentation must be provided.

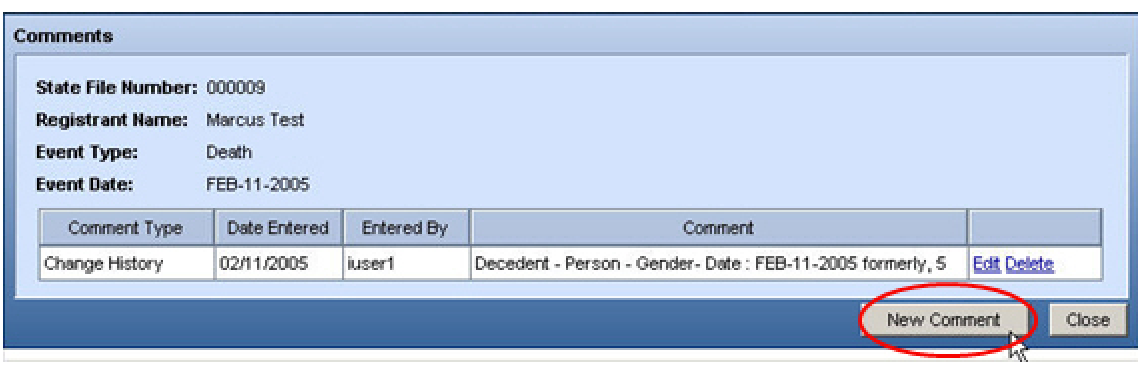
To complete this page, select the **Clear** button to clear all entries and start over, **Save** to save your work, or **Return** to return to the **Death Registration Menu** without saving your changes.

Amendment Change History

The **Amendment Change History** page provides a summary of all changes and enables the user to add or edit comments associated with the amendments.

To access this page, select the **Amendment Change History** link from the **Amendments Menu**.

This will open a popup window displaying the amendments and their associated **Comments**.



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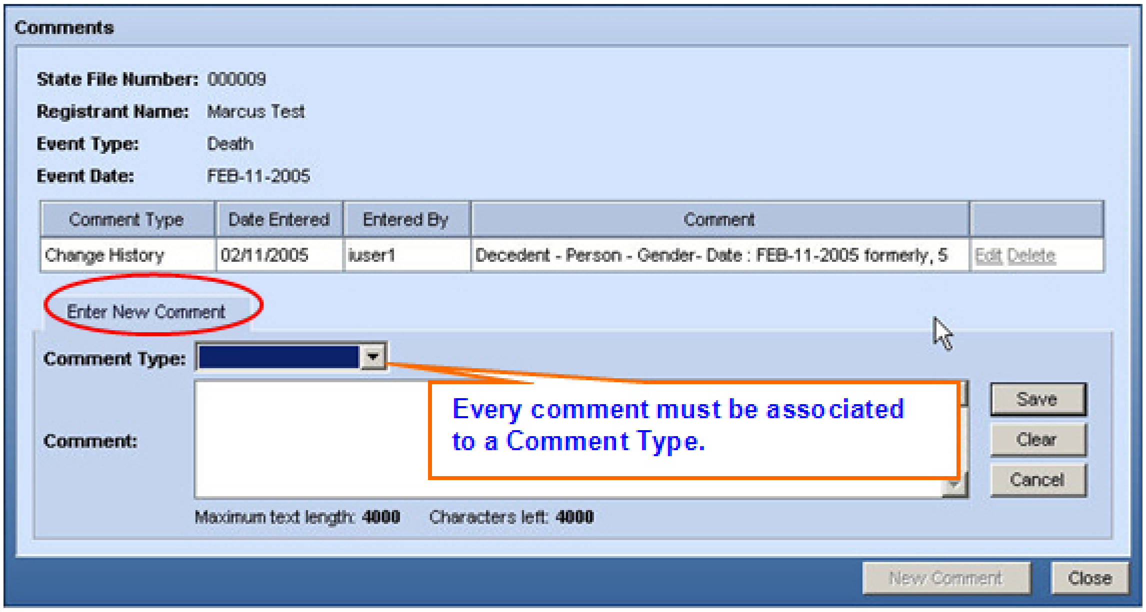
To add a new comment, click on the **New Comments** button.

This will display the **Enter New Comment** tab. Make a selection from the **Comment Type** dropdown list and then add your comment to the **Comment** text entry control.



Use the **Save** button to save your comment and close the popup window, the **Clear** button to clear all comments, or the **Cancel** button to close the **Comments** window without saving any changes.

Once you have clicked the **Save** button your changes will appear in the **Comments** popup window.

Click the **Close** button to close the popup and return to the **Amendments Menu**.

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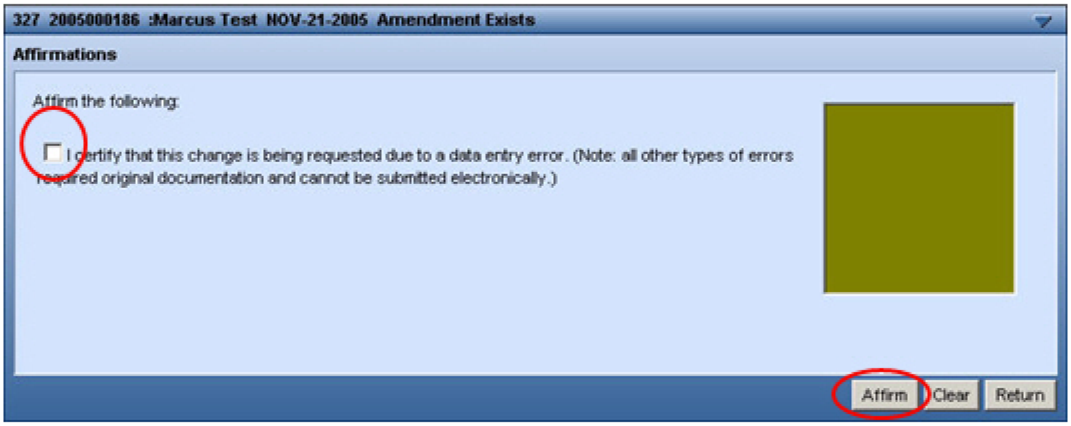
Amendment Affirmation
Skills Learned: In this exercise you will learn how to affirm and amendment.

NOTE: In many jurisdictions, death certificate amendments require signed statements, letters, or affidavits by a funeral home attesting that the amendment is being requested due to a data entry error. The Affirmation described here is used to replace that paper-intensive process. Therefore, for every electronic amendment request, the Funeral Director must affirm the request using the procedures described below.

From the **Amendment Menu**, select **Amendment Affirmation**. The affirmation page shown below will display.



Place a checkmark in the **Affirm the Following** checkbox and click the **Affirm** button.

Place a biometrically enrolled finger on the fingerprint scanner. The scanner will 'read' your fingerprint and display it onscreen. Once the fingerprint has been read the message Finger print acquired will be displayed.

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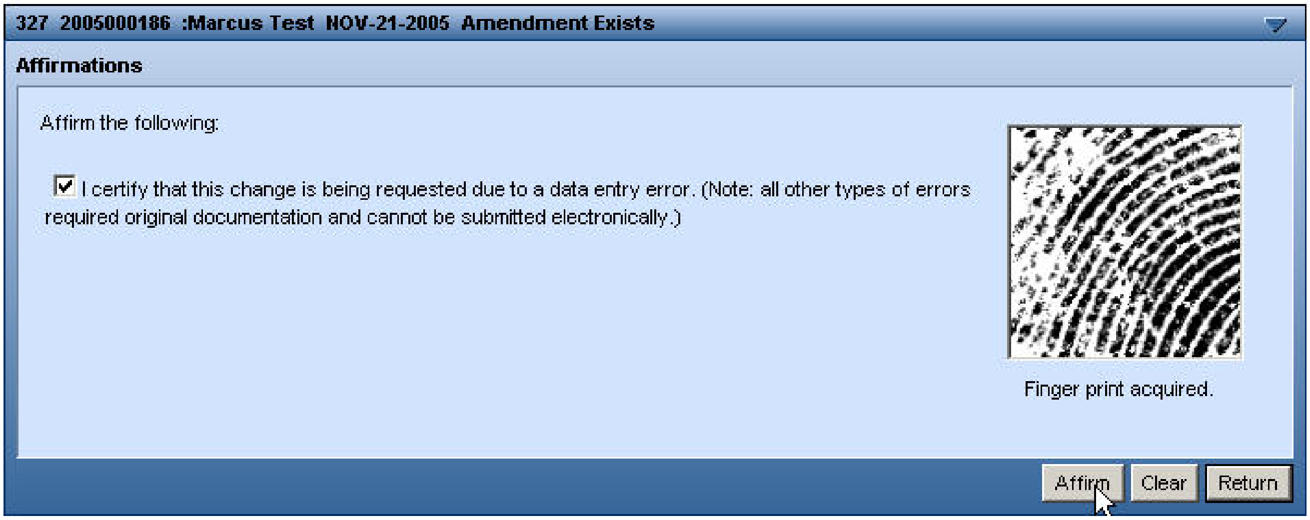
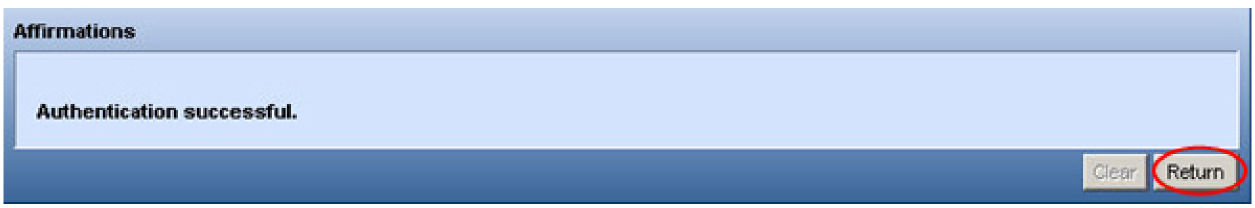


If the fingerprint can be read and matched to a user enrolled print in the **DAVE™** database then the record will be officially signed/affirmed and an **Authentication Successful** message displayed:



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Replacement Certificates

In this section you will learn how to use the **Amendments** process to request a **Replacement Certificate** of a certified record. Replacement certificates are required when it has been determined that the facts of death have been reported incorrectly.

Note: the ability to request Replacement Certificates is based on user security privileges and is typically limited to users with a Medical Examiner profile. You may or may not have access to this feature.

Access the record containing errors to be corrected. Then, from the **Death Registration Menu**, select **Other Links →Amendments**.

From the **Amendment Page**, locate the **Type** dropdown list and select **Replacement Certificate**.

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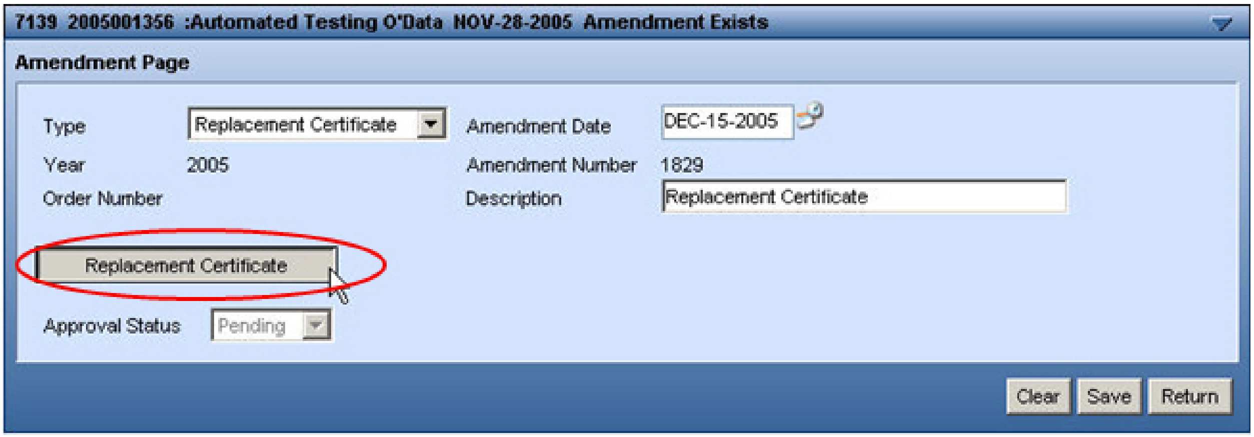
The page will refresh and include a **Replacement Certificate** button. Place a description of the change to be made in the **Description** text box and click the **Replacement Certificate** button.



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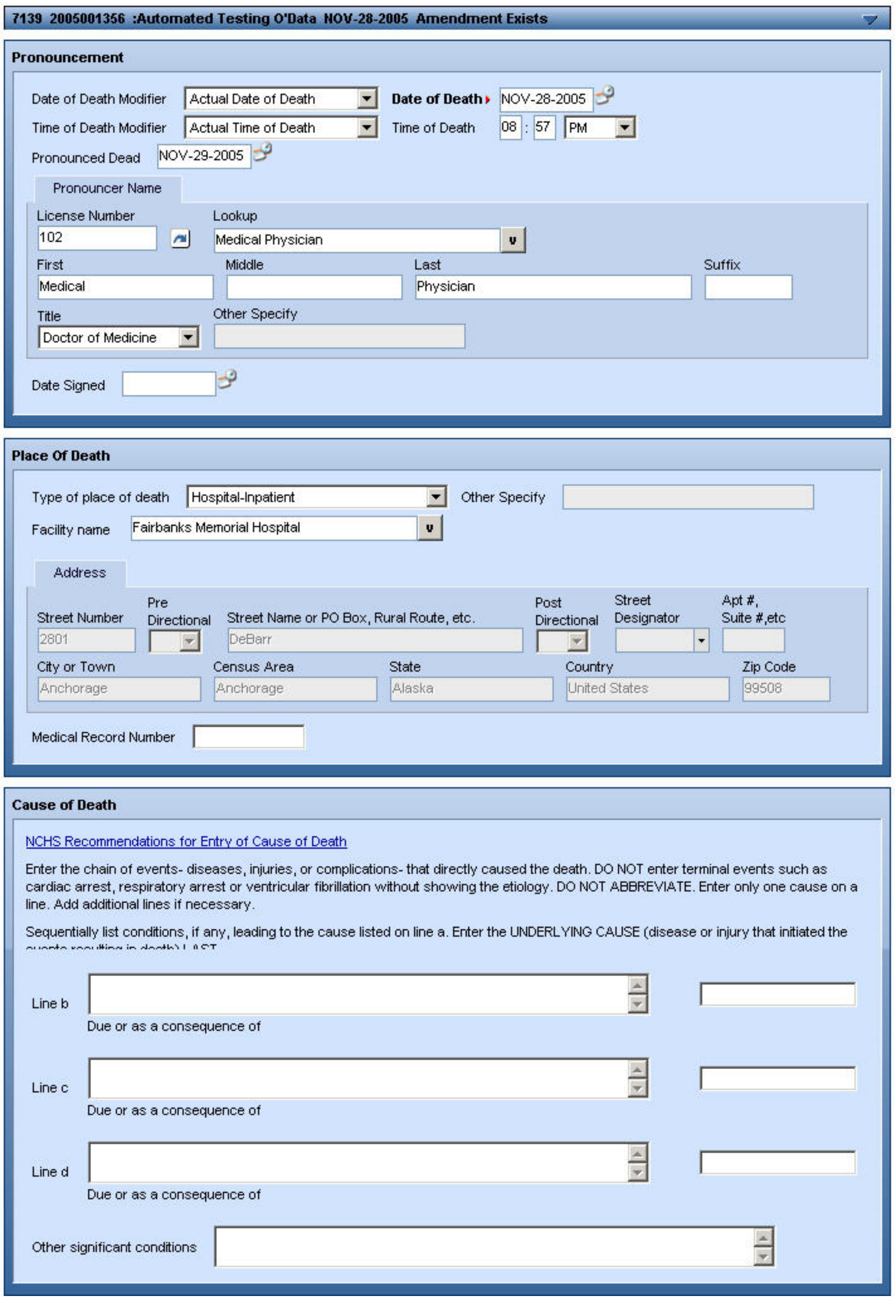
Selecting the **Replacement Certificate** button will cause the page to refresh and display a scrolling window containing all of the pages found on the **Medical Certification** sub-menu.



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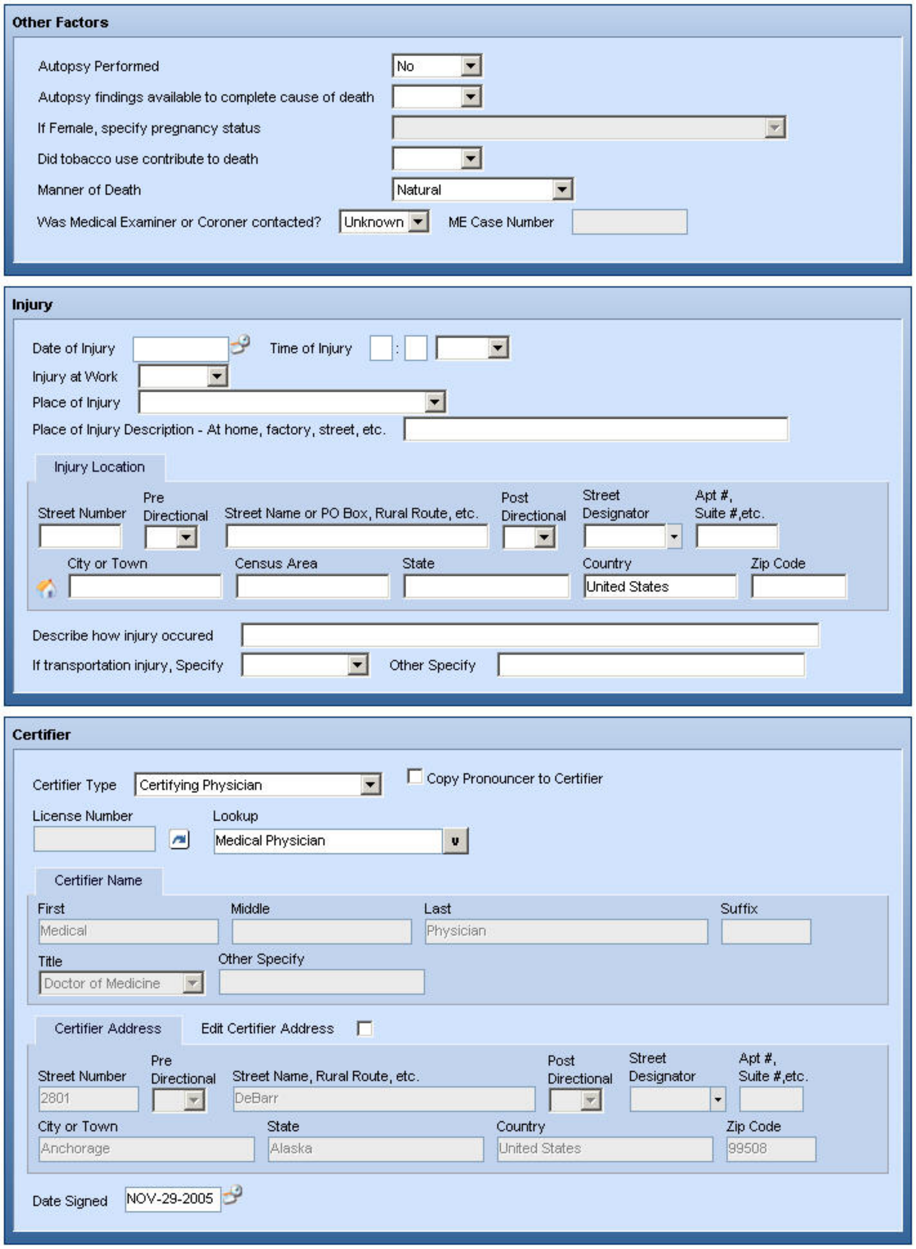
From among the pages displayed, locate the error to be corrected.



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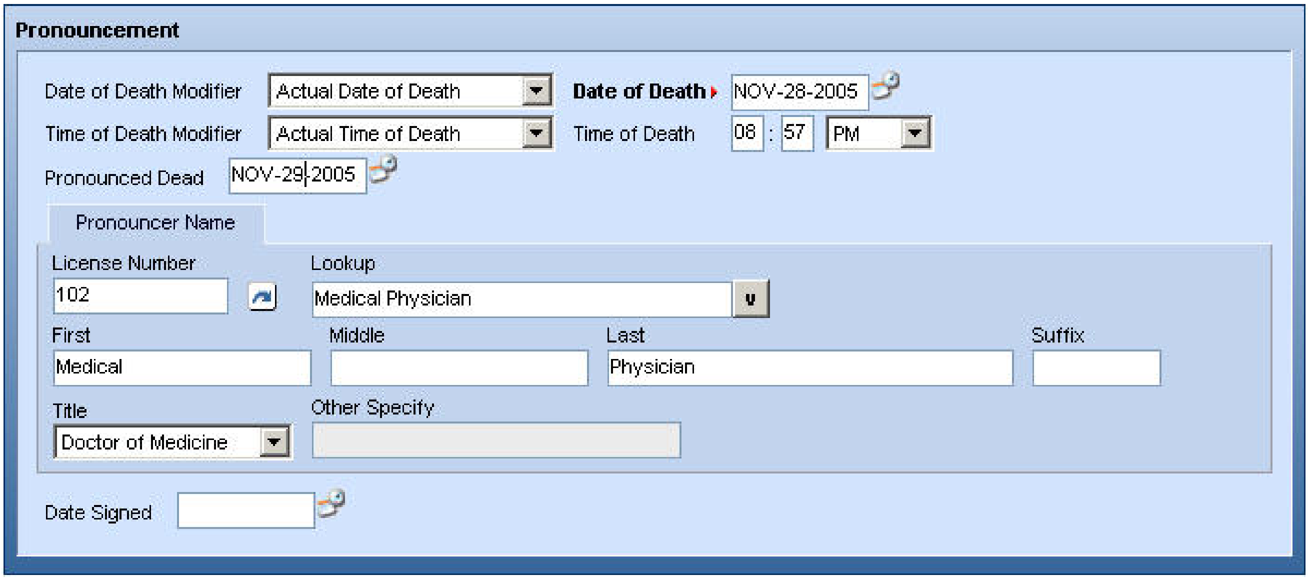
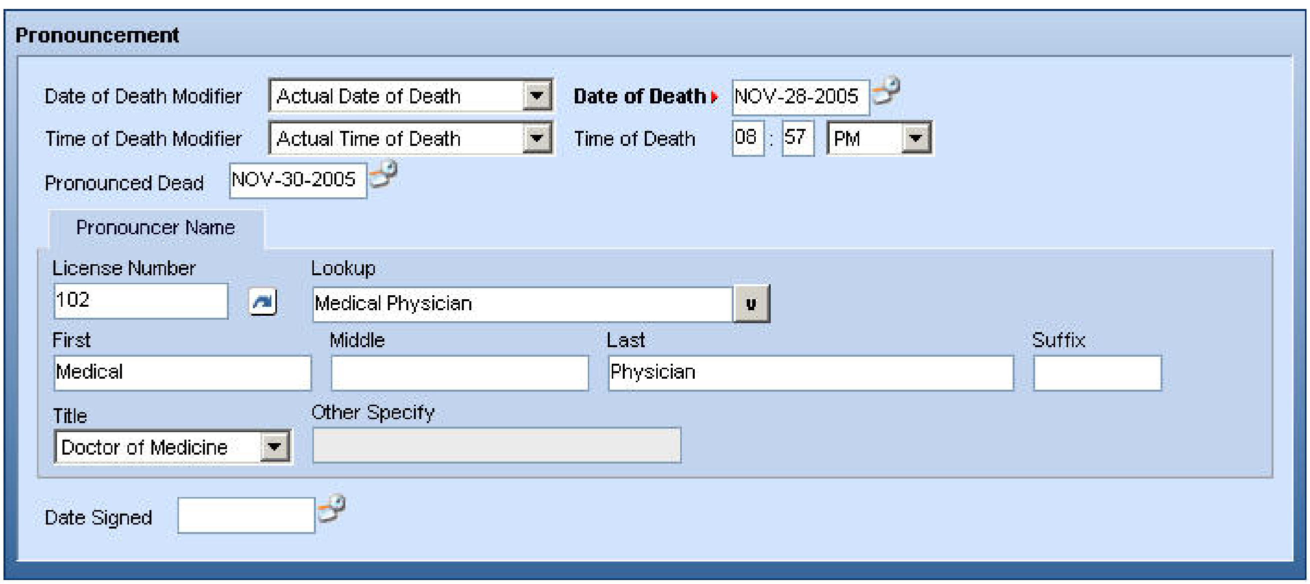
For the purposes of this exercise, locate the **Pronouncement** page and changed the **Pronounced Dead** date.



Here we have changed the **Pronounced Dead** date from **Nov-29-2005**, to **Nov 30 2005**.



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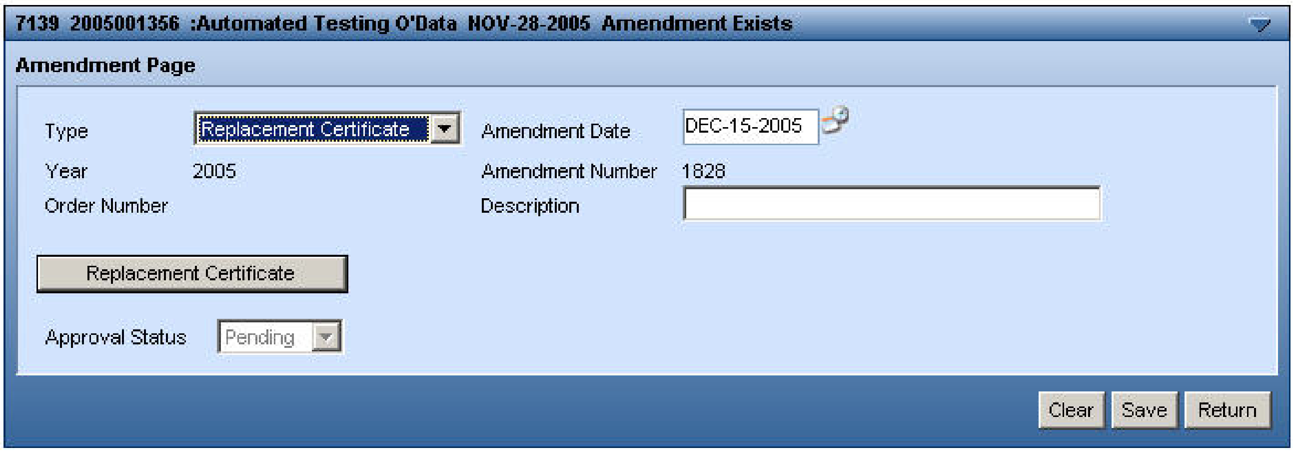
At the bottom of the scrolling window, locate and click the **Save** button:

Return to the **Amendments Menu** and select **Processing History**:



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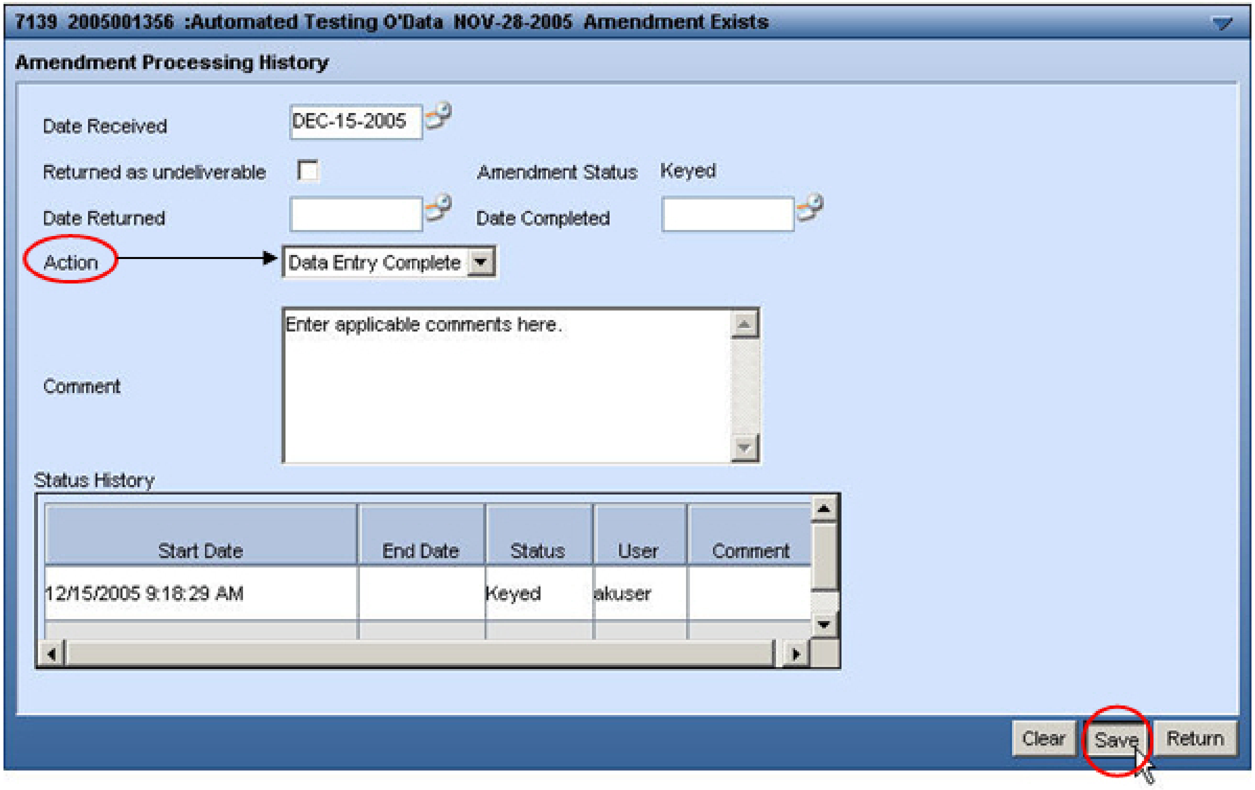
From the **Amendment Processing History** page, locate the **Action** dropdown list and select **Data Entry Complete**. Enter any applicable comments in the **Comment** box and click the **Save** button.



When the page has refreshed, select **Approve** from the **Action** dropdown list, enter any appropriate comments and, again, click the **Save** button.

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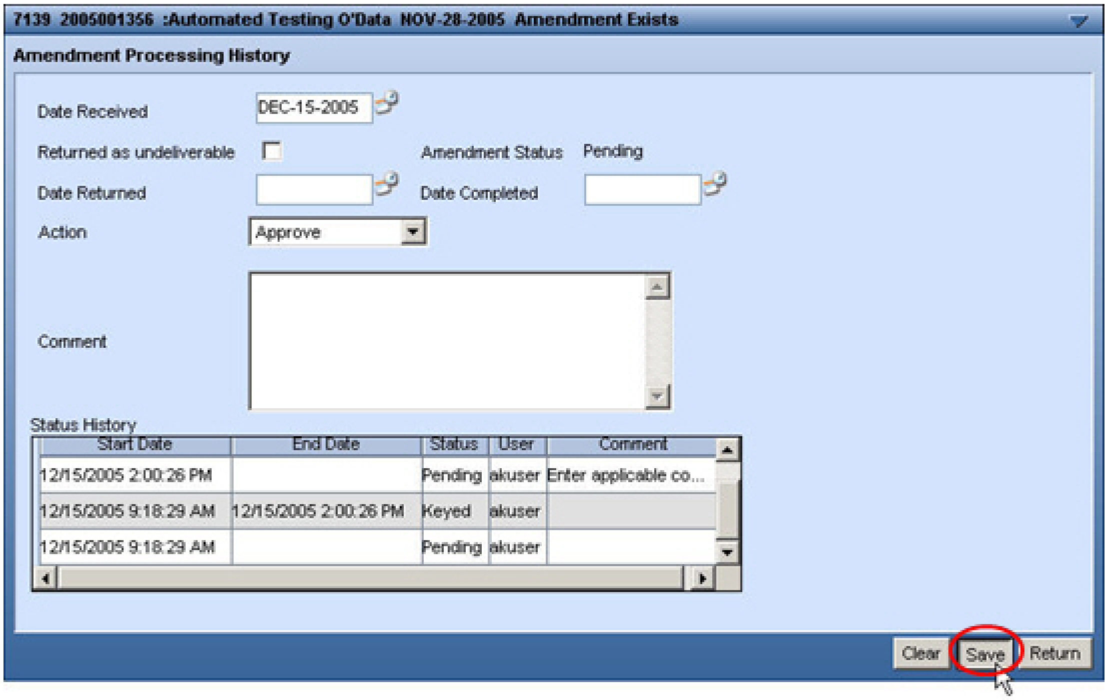
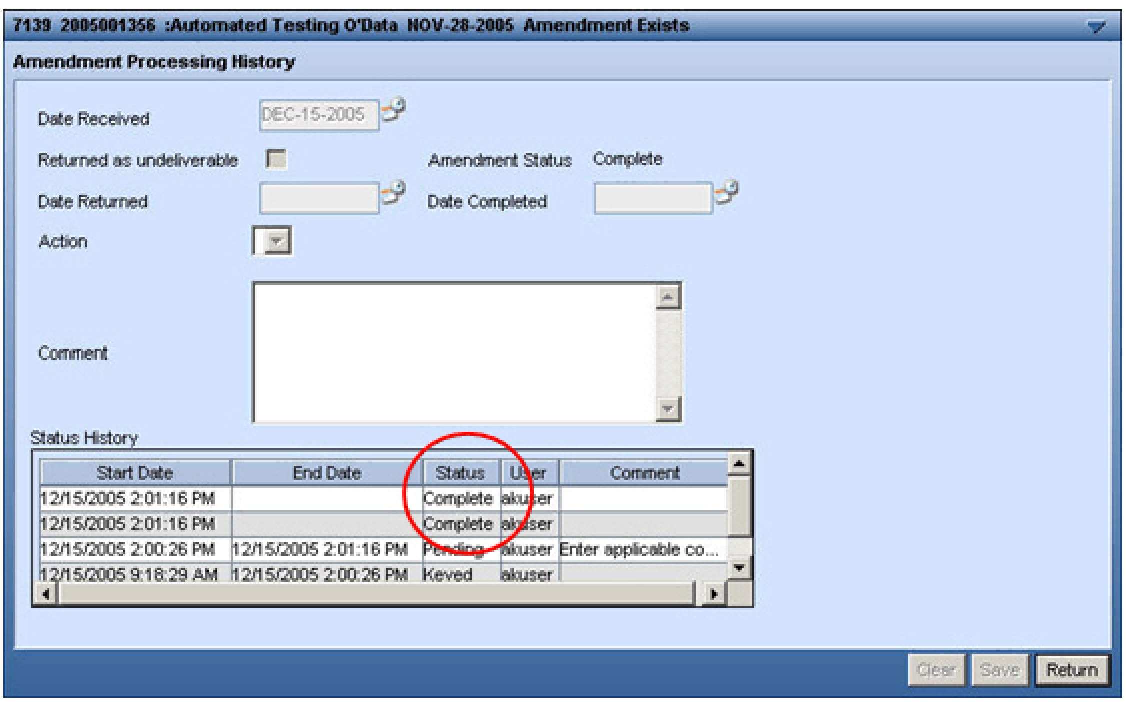


When the page refreshes this time, the **Status** of the **Amendment** will change to **Complete** and the onscreen controls will be disabled for this amendment.



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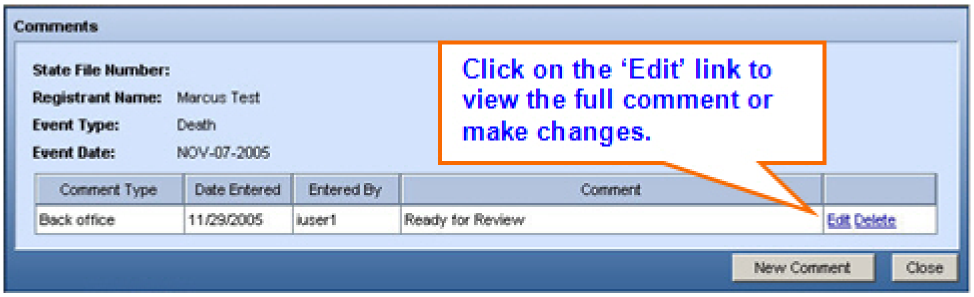
Comments

During the process of preparing and finalizing a death record it is sometimes necessary to store comments or remarks about the case. These comments can serve as reminders or as instructions to others who will work on the case.

Click on **Comments** in the **Other Links** sub-menu. The **Comments** window will pop-up on top of the currently displayed page.

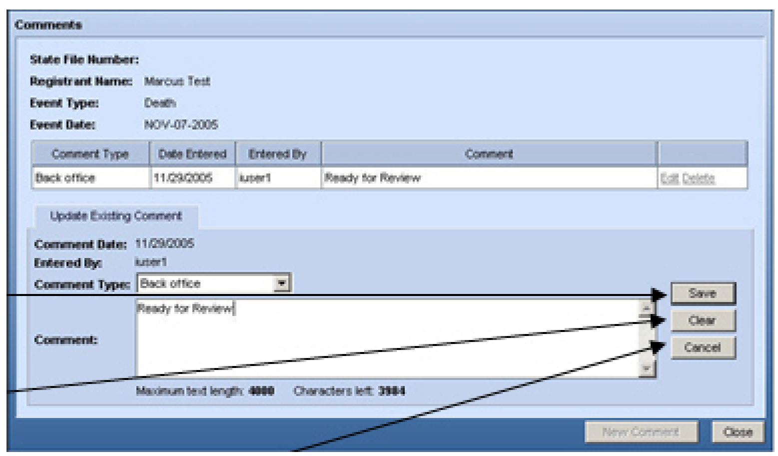


In this case, we were on the main Decedent page when we clicked the Comments link. The Decedent page can be seen behind the Comments window.

Clicking on the **Edit** link will open the **Update Existing Comment** tab for you to view and, if necessary, edit the comment.

If you do edit the Comment, click on the **Save** button to save your changes.

To clear and re-enter the comments, click **Clear**.



To exit without saving changes, click **Cancel**.

Click the **Delete** link to remove the comment from the system.

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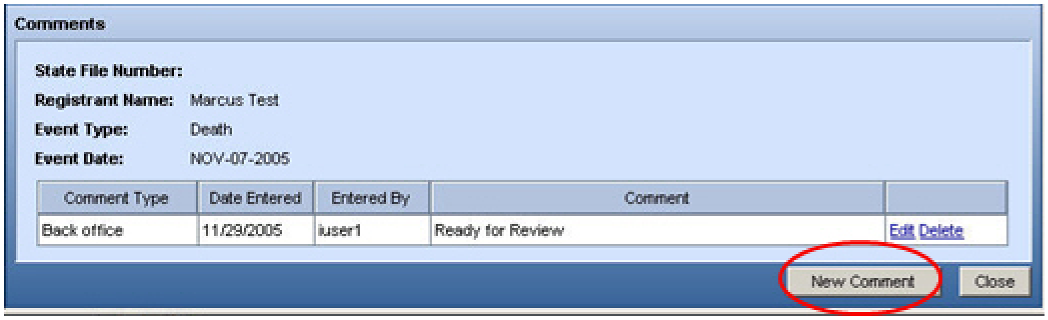
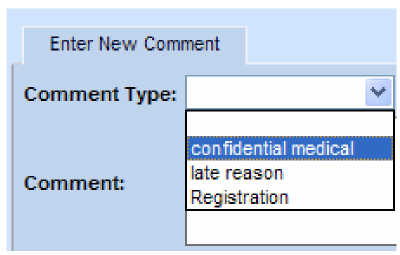
To add a new comment, click on the **New Comment** button located at the bottom of the **Comments** window.

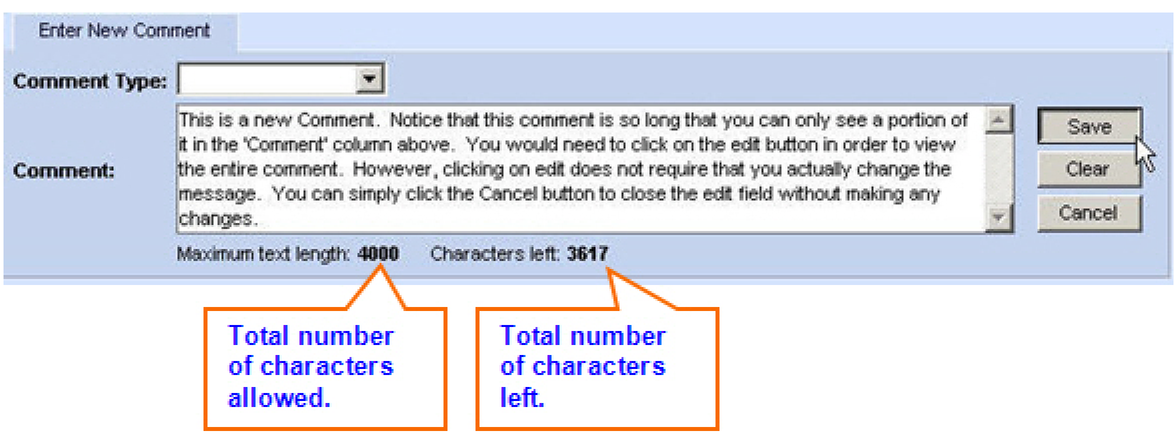


The **Enter New Comment** tab will open allowing you to enter your new comment. As before, click on **Save** to save your comment, **Clear** to clear the text box and start over or **Cancel** to close the tab without saving.

Select a **Comment Type** from the drop-down arrow, then enter a comment.



Note: comments are limited to 4000 characters. Fortunately, **DAVE™** keeps track of how many characters you've used and displays that information for you.



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NOTE: The ability to Edit or Delete comments is determined by the individual user's security configuration. You may or may not be able to Edit or Delete existing comments.

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Cremation Clearance

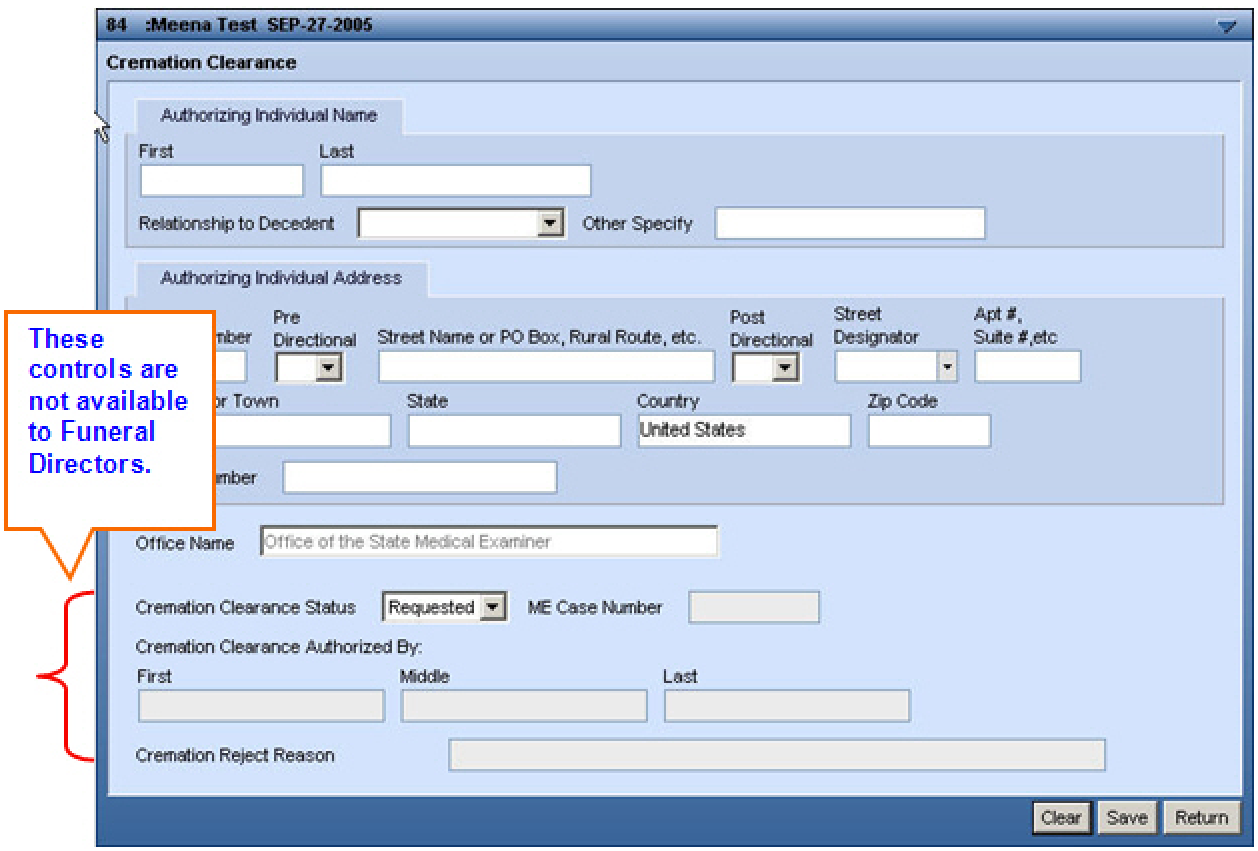
Note: The Cremation Clearance page is not used for the State of Oregon.

When cremation is to be used for final disposition, the **Cremation Clearance** page must be completed. However, there are two different ways to complete the Cremation Clearance page: as a funeral director or as a medical examiner.

Select **Cremation Clearance** from the **Death Registration Menu** - **Other Links** sub-menu. This form must be completed before final disposition will be authorized.

First, lets look at the steps necessary to complete the **Cremation Clearance** page from the perspective of a Funeral Home Director/User.

From the **Other Links** sub-menu, select **Cremation Clearance**. This page must be completed before final disposition will be authorized.



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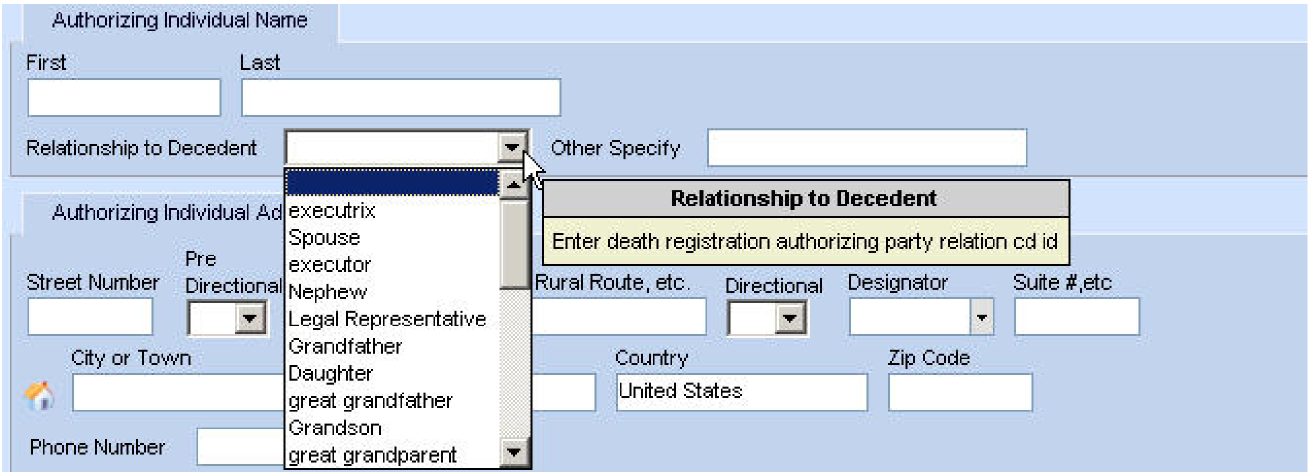
The **Authorizing Individual Name** should be the family member or person who requested cremation. In addition to filling in the authorizing individual's name, a selection must be made from the Relationship to Decedent dropdown list.



Complete the **Authorizing Individual Address** tab by filling in all the applicable address text boxes. If the street address has a **Pre-Directional** indicator, i.e. *East* 42nd St. then indicate that by selecting **E** from the **Pre-Directional** dropdown list. Do NOT type the **Pre-Directional** indicator in the **Street Name** text box.

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

Make a selection from the **Cremation Clearance Status** dropdown list. For Funeral Home users, there is only one option available in the **Cremation Clearance Status** dropdown list: **Requested**.

NOTE: The remaining fields on this page: ME Case Number, Cremation Clearance Authorized by, and Cremation Reject Reason can only be completed by a Medical Examiner.

Select the **Clear** button to clear your entries and start over, **Save** to save changes and return to the **Main Menu** or **Return** to return to the **Main Menu** without saving changes.

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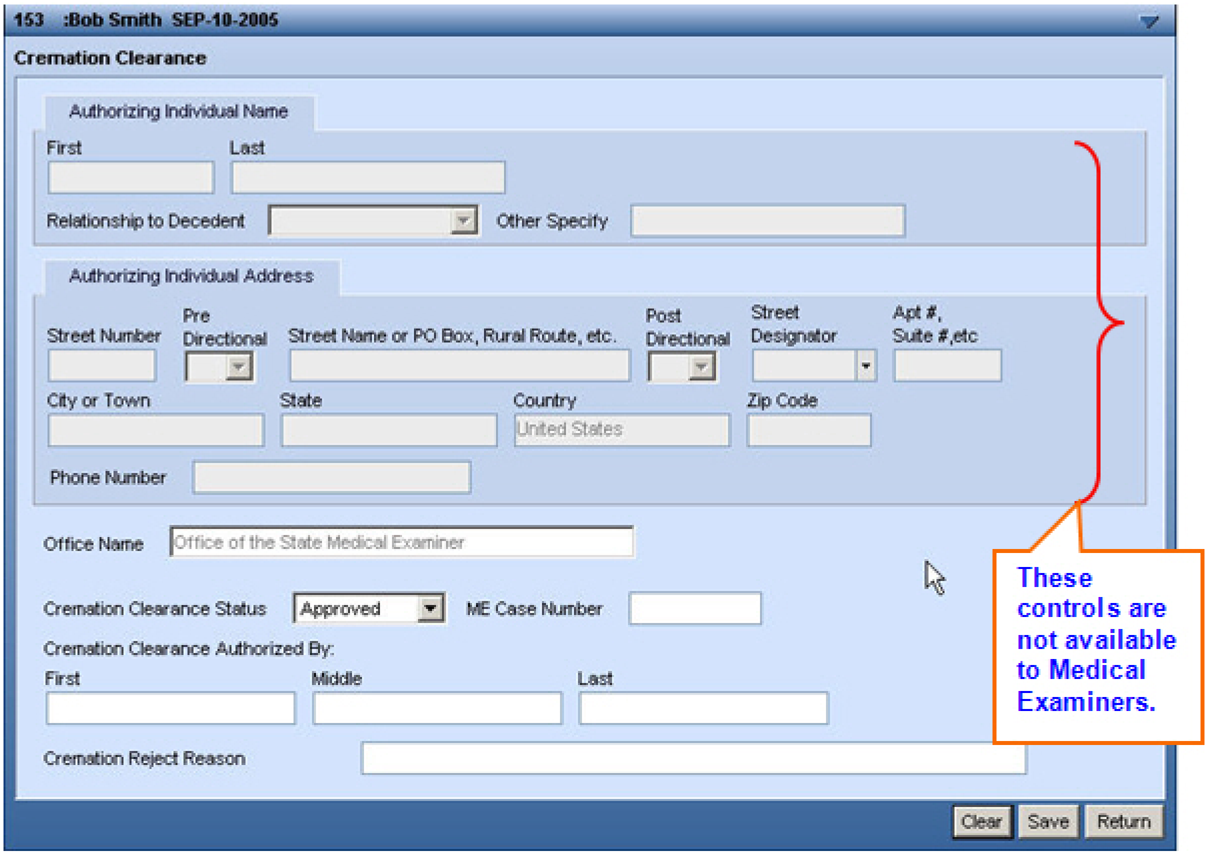
Now, let's look at the steps necessary to complete the **Cremation Clearance** page from the perspective of a Medical Examiner/User.

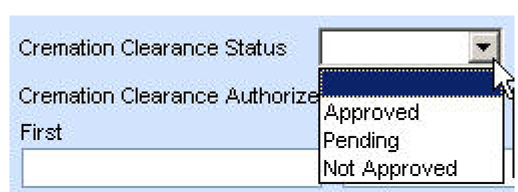
From the **Other Links** sub-menu, select **Cremation Clearance**. This page must be completed before final disposition will be authorized.



The **Authorizing Individual Name** will be system filled. The controls on this tab are not accessible by Medical Examiner users.

The **Authorizing Individual Address** tab will also be system filled. The controls on this tab are not accessible by Medical Examiner users.

Make a selection from the **Cremation Clearance Status** dropdown list.



If one has been assigned, enter the **ME Case Number**.

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Cremation Clearance Authorized By will be system filled with the name of the official authorizing the cremation.

If the cremation cannot be authorized, explain why in the **Cremation Reject Reason** text box control.

Select the **Clear** button to clear your entries and start over, **Save** to save changes and return to the **Main Menu** or **Return** to return to the **Main Menu** without saving changes.

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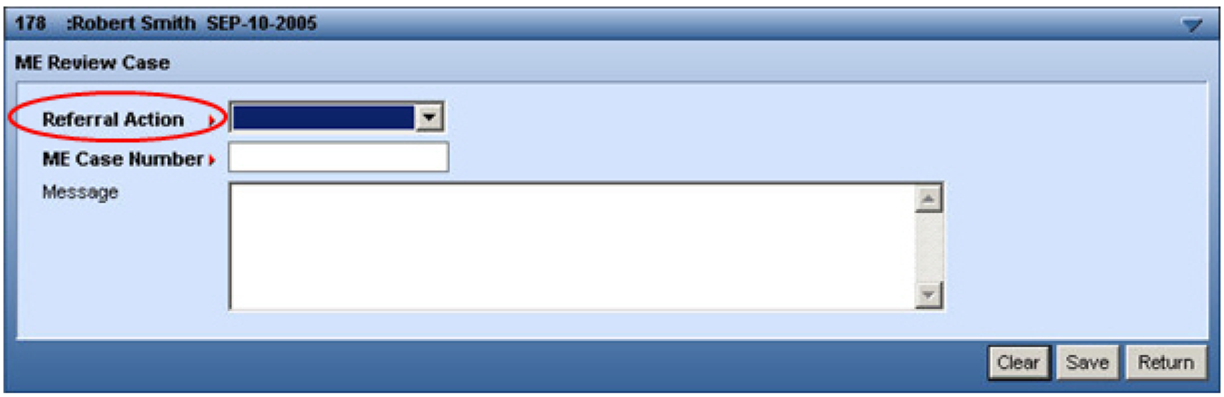
ME Review Case

ME Review Case page to accept, decline, pend, or take ownership of a record.

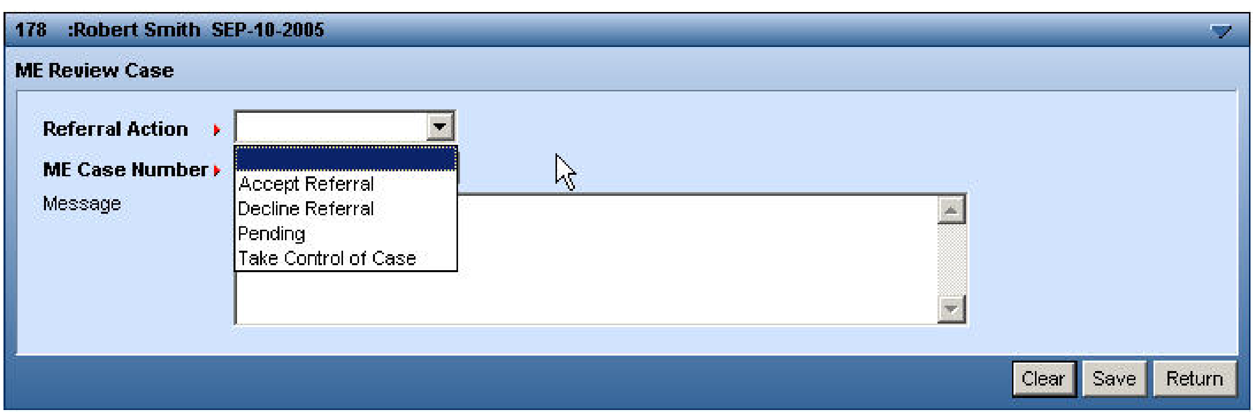
The **ME Review Case** page provides the ability for a medical examiner or coroner to accept a referral, decline a referral, take control of a case or to set the referral action to pending.

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



Note: Access to the ME Review Case page is restricted based on user security privileges. You may or may not be able to access this page.

Make a selection from the **Referral Action** dropdown list:



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About Referral Actions:

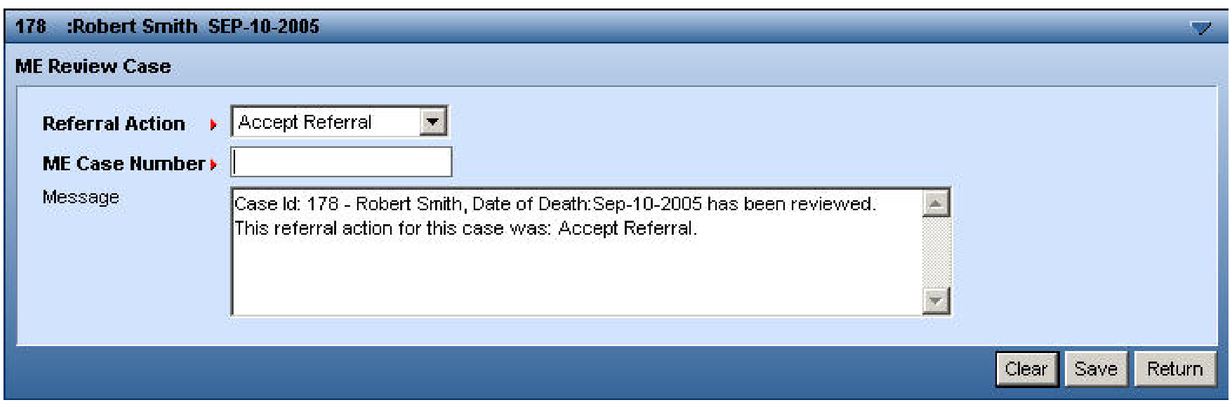
a. **Accept Referral** is used for cases referred to ME that can occur at any point in the registration process including after filing.

b. **Decline** is used to deny taking ownership or control of a record.

c. **Pending** is used to handle those cases where the ME determines that additional discussion is needed with the physician before making a determination on the case or when the cause of death is inadequate or incomplete.

d. **Take Control of Case** is used when the ME/Coroner is not the medical owner of the case, however, he/she determines that the case falls under ME jurisdiction. Once the ME/Coroner user accepts or takes control of a case then he/she is responsible for completing and certifying the medical information.

Note that once a selection has been made from the **Referral Action** dropdown list, a system message is automatically entered into the **Message** box. This message can be used as is, edited, or deleted entirely.



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

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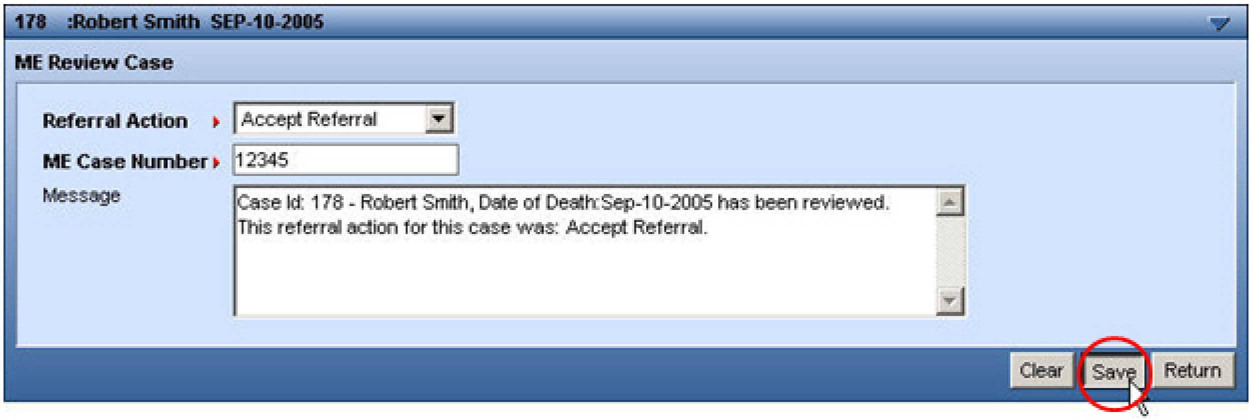

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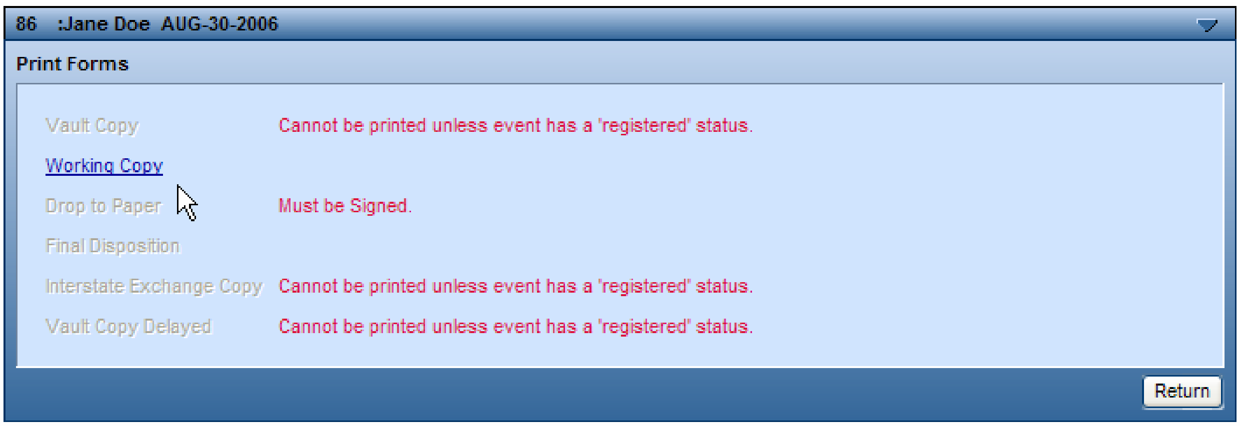
Print Forms

The **DAVE™** system includes a fully functional print engine that you can use to send working copies or permanent, vault copies of completed death certificates to your locally installed printed.

To print available forms from within the DAVE application, select **Death Registration Menu -> Other Links -> Print Forms**.

Note: Access to the Print Forms link is based on user security configuration. Also, available forms will vary according to user and user-type.



The **Print Forms** window displays forms available for printing as underlined links. Click on any available link to proceed.

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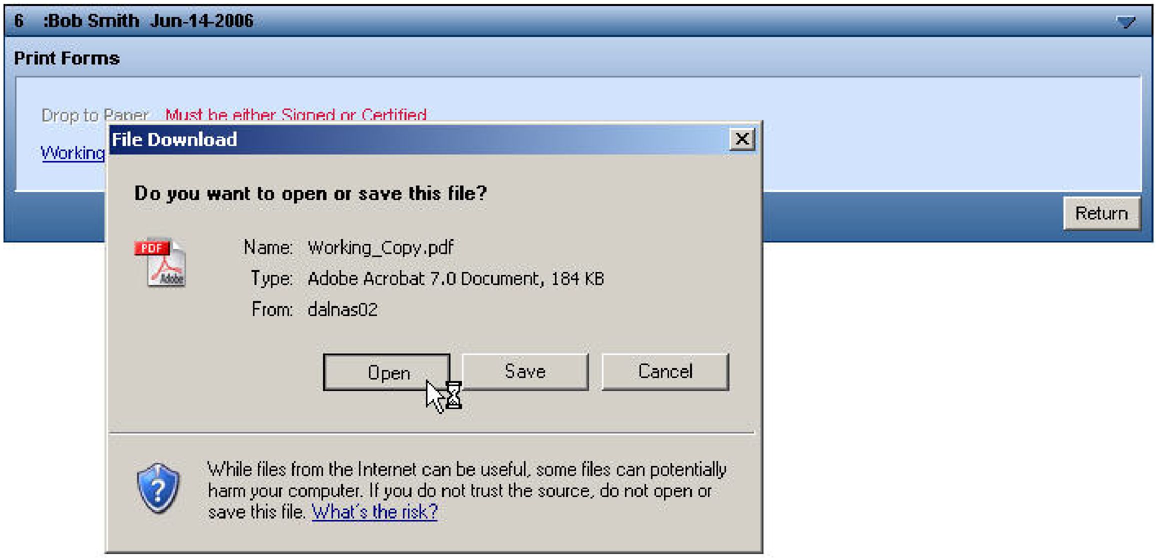
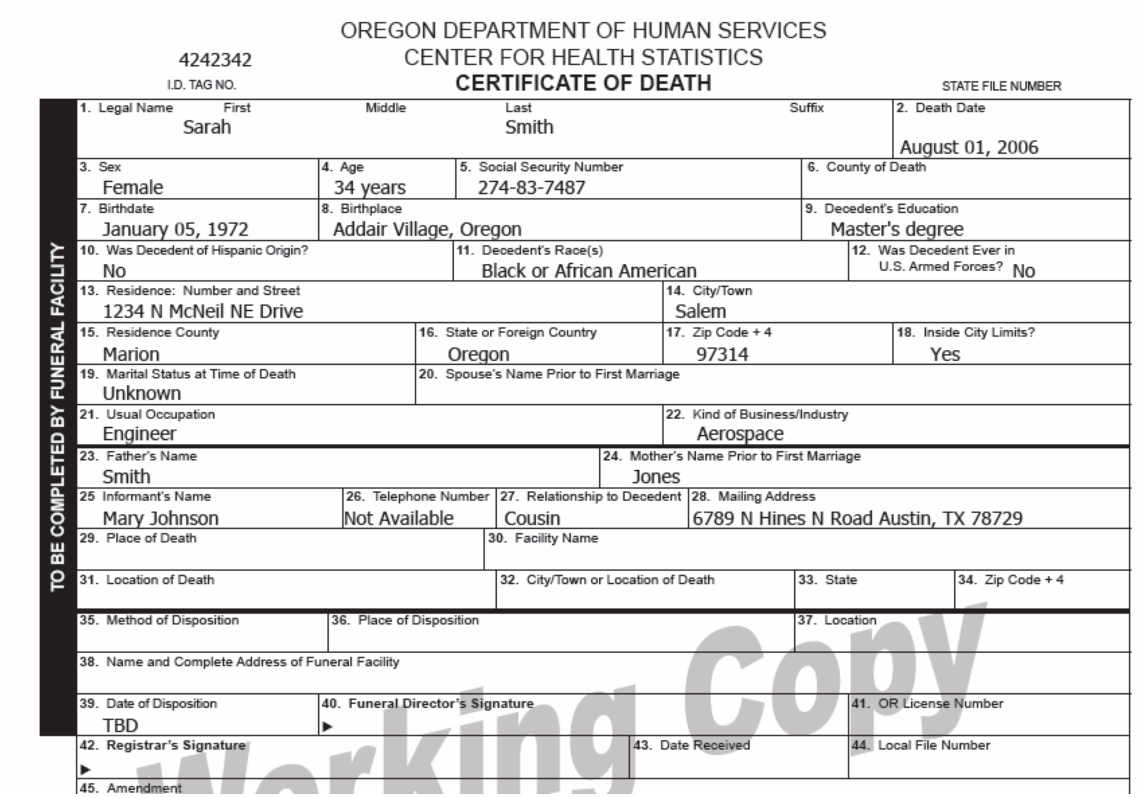
Selecting any printable form will launch the MS Windows **File Download** dialog. Select **Open** to download and view the form in Adobe Acrobat ".pdf" format.



With the form open, use the Adobe Acrobat print function to send the form to a locally installed printer.



OREGON DEPARTMENT OF HUMAN SERVICES
CENTER FOR HEALTH STATISTICS
CERTIFICATE OF DEATH

4242342
I.D. TAG NO.
STATE FILE NUMBER

TO BE COMPLETED BY FUNERAL FACILITY

1. Legal Name — First: Sarah; Middle; Last: Smith; Suffix
2. Death Date: August 01, 2006
3. Sex: Female
4. Age: 34 years
5. Social Security Number: 274-83-7487
6. County of Death
7. Birthdate: January 05, 1972
8. Birthplace: Addair Village, Oregon
9. Decedent's Education: Master's degree
10. Was Decedent of Hispanic Origin? No
11. Decedent's Race(s): Black or African American
12. Was Decedent Ever in U.S. Armed Forces? No
13. Residence: Number and Street: 1234 N McNeil NE Drive
14. City/Town: Salem
15. Residence County: Marion
16. State or Foreign Country: Oregon
17. Zip Code + 4: 97314
18. Inside City Limits? Yes
19. Marital Status at Time of Death: Unknown
20. Spouse's Name Prior to First Marriage
21. Usual Occupation: Engineer
22. Kind of Business/Industry: Aerospace
23. Father's Name: Smith
24. Mother's Name Prior to First Marriage: Jones
25 Informant's Name: Mary Johnson
26. Telephone Number: Not Available
27. Relationship to Decedent: Cousin
28. Mailing Address: 6789 N Hines N Road Austin, TX 78729
29. Place of Death
30. Facility Name
31. Location of Death
32. City/Town or Location of Death
33. State
34. Zip Code + 4
35. Method of Disposition
36. Place of Disposition
37. Location
38. Name and Complete Address of Funeral Facility
39. Date of Disposition: TBD
40. Funeral Director's Signature ▶
41. OR License Number
42. Registrar's Signature ▶
43. Date Received
44. Local File Number
45. Amendment

Working Copy

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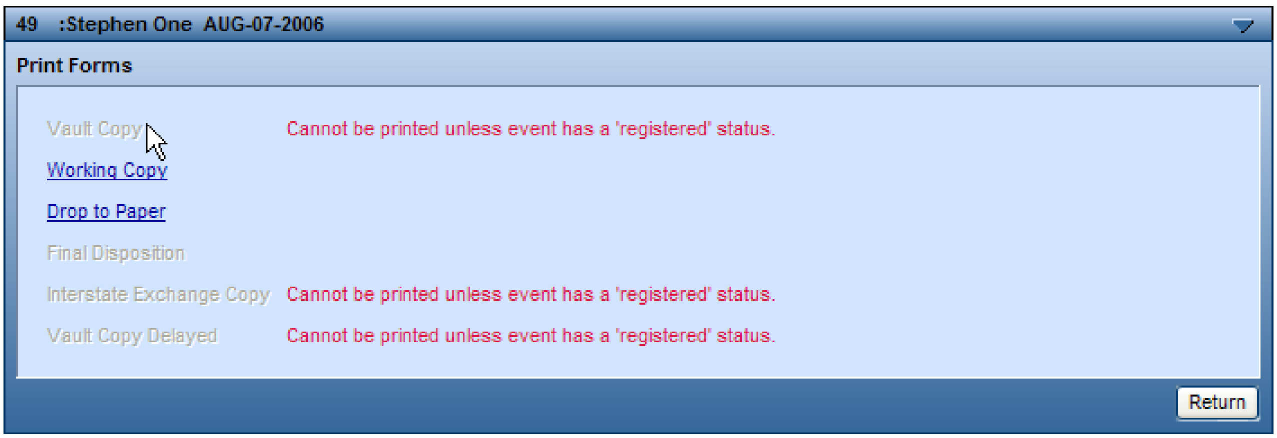
Vault Copy

Vault copies can only be printed when the death has been successfully registered. Vault copies are the permanent record of the death registration.

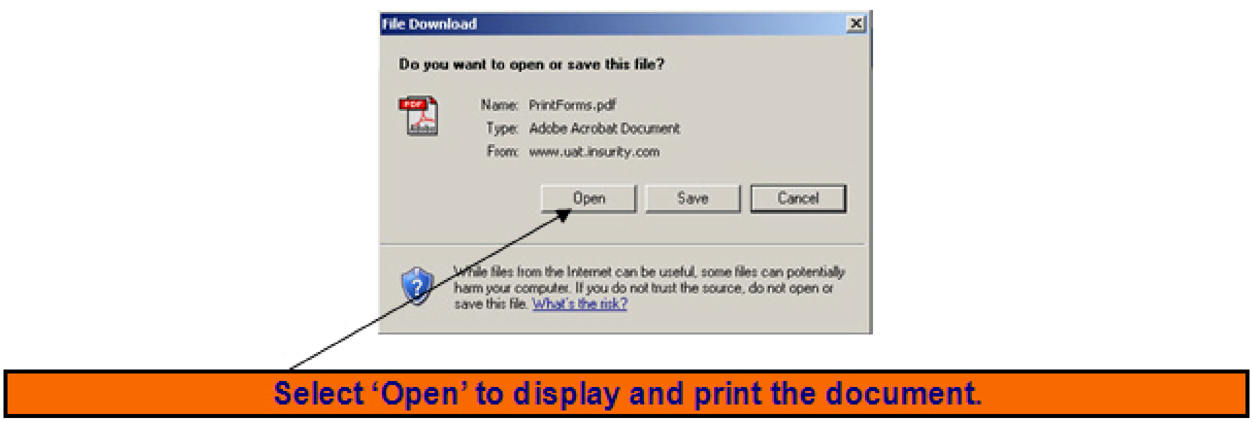
Note: The ability to print Vault Copies is based on user security privileges and the status of the registration itself. Typically, only state staff will be printing Vault Copies.

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

Locate the underlined **Vault Copy** link (if underlined and available to print).



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



Once the document displays, you can use the Adobe application to print the certificate.

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Number Paper Document

The purpose of the **Number Paper Document** process to number a paper death certificate for a registration that was not initiated in the **DAVE™** system. The number paper document feature provides the ability to print a system assigned State File Number (SFN), file date and other jurisdictionally determined information on a paper death certificate.

Typically, the **Number Paper Document** process begins when a funeral director enters the state registration office and presents a completed death certificate that he has completed on his own, without using the **DAVE™** application.

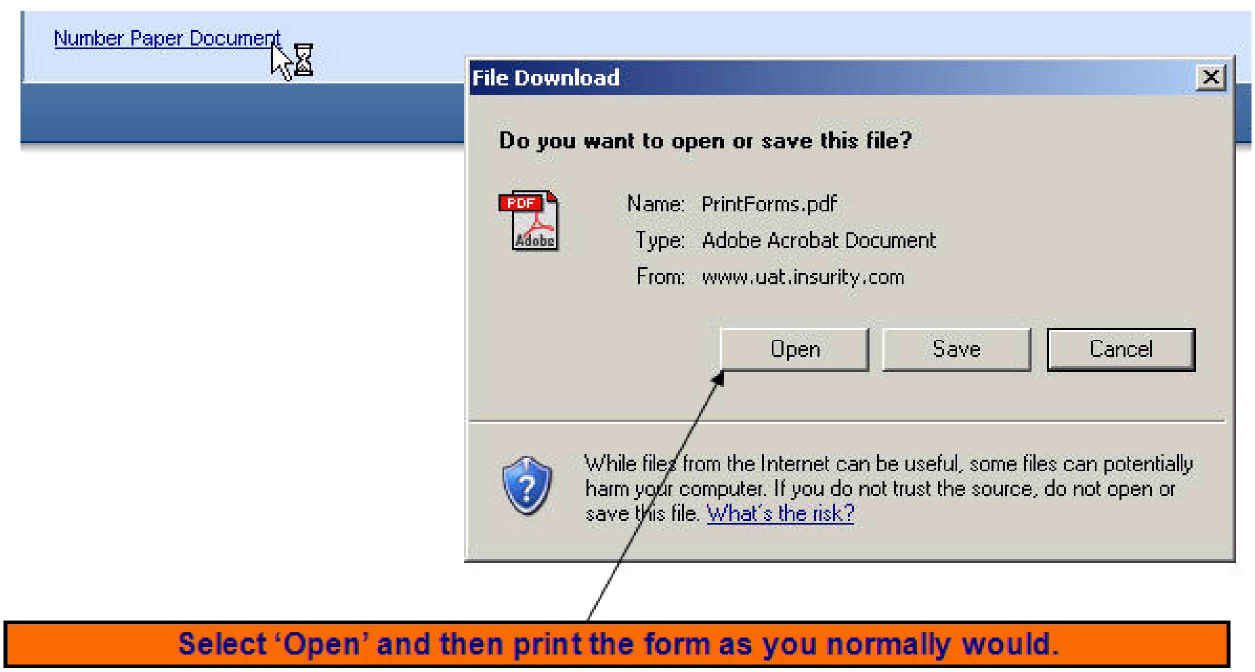
Upon receipt of the death certificate, the registration clerk will use the **Start/Edit New Case** feature to perform a search to determine if the case has been entered into the **DAVE™** application. This is done to prevent the entry of duplicate records.

If no matching records are found then the clerk will click the **Start New Case** button.

From the **Decedent** page the user will select **Other Links -> Print Forms**.

Select **Number Paper Document** from the **Print Forms** window. Upon selection of the **Print Forms** link, the next sequential file number will be system assigned and the file date will be updated with the current date.

Select **Open** from the **File Download** dialog box.



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When the .pdf file opens you will see the following message:

PLACE THE DEATH CERTIFICATE INTO THE PRINTER AND PRINT THIS FORM.

(THESE INSTRUCTIONS WILL NOT PRINT)

Insert the numbered security paper into your printer as instructed and print the form as usual. The onscreen instructions shown above will not print, just the SFN, file date and any other jurisdictionally determined information.

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Drop to Paper

The **Drop to Paper** link is used to print a paper death certificate for a registration for a case that was started in the **DAVE™** system, but which will have to be completed manually.

DAVE™ uses the **Drop to Paper** link to provide the ability for authorized users to print a death certificate when either the personal information or the medical certification has been authenticated and it is known that the other information will be completed manually.

For example, if the user is a Funeral Director and the record has a Signed status, or, if the user is a Medical Certifier and the record has a status of Pronounced and Certified, then the **Drop to Paper** link will be enabled. However, drop to paper should only be used if the certification process is to be completed outside of the **DAVE™** application.

Once a certificate is 'dropped to paper', previously authenticated signatures are printed along with all filled-in data. The paper document is then considered the official source of the death certificate information. At this point, **DAVE™** locks all "authenticated' information from further update in order to ensure the paper document matches the electronic record. Authorized users, such as state users still have the ability to update 'locked' items once the paper document is filed.

To access the **Drop to Paper** link, select **Death Registration Menu -> Other Links -> Print Forms**.

NOTE: Access to the Drop To Paper link is limited by both user security configuration AND the status of the record in question. Even with the proper security profile, you may or may not have access to the Drop to Paper link.

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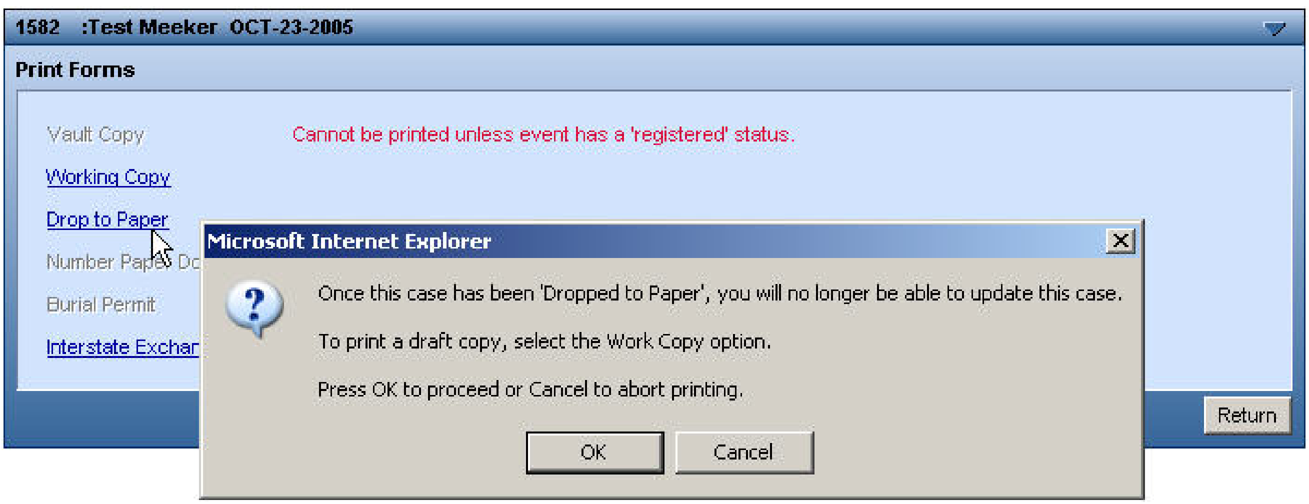
From the **Print Forms** page, locate and click on the **Drop to Paper** link:

Remember, once a record has been dropped to paper, **DAVE^{TM}** locks all "authenticated' information from further update in order to ensure the paper document matches the electronic record. The system will produce a warning to that effect. Select **OK** to proceed.



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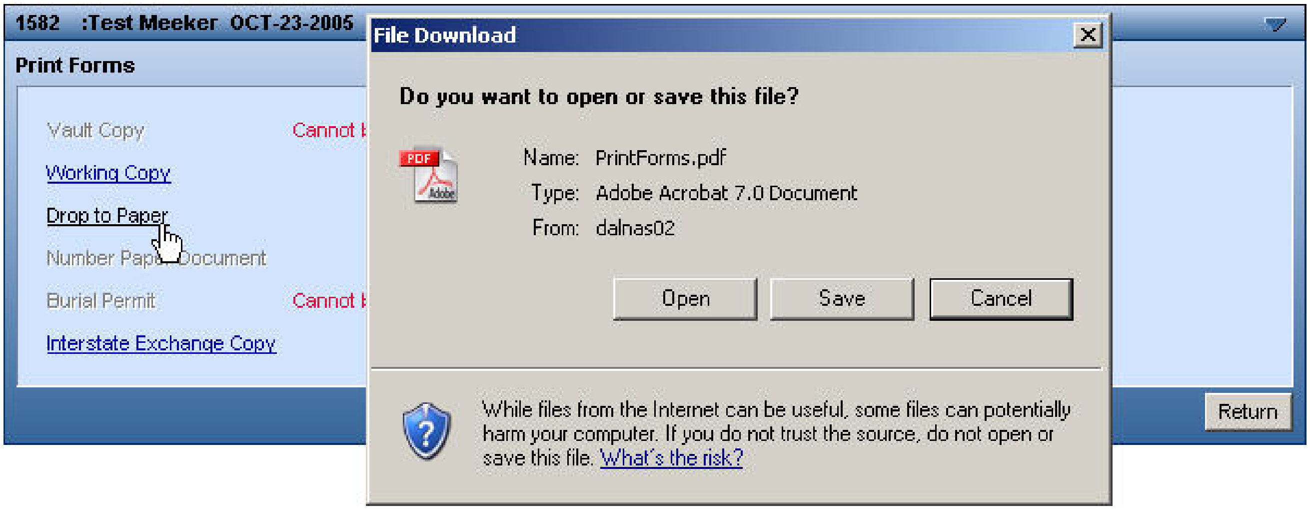
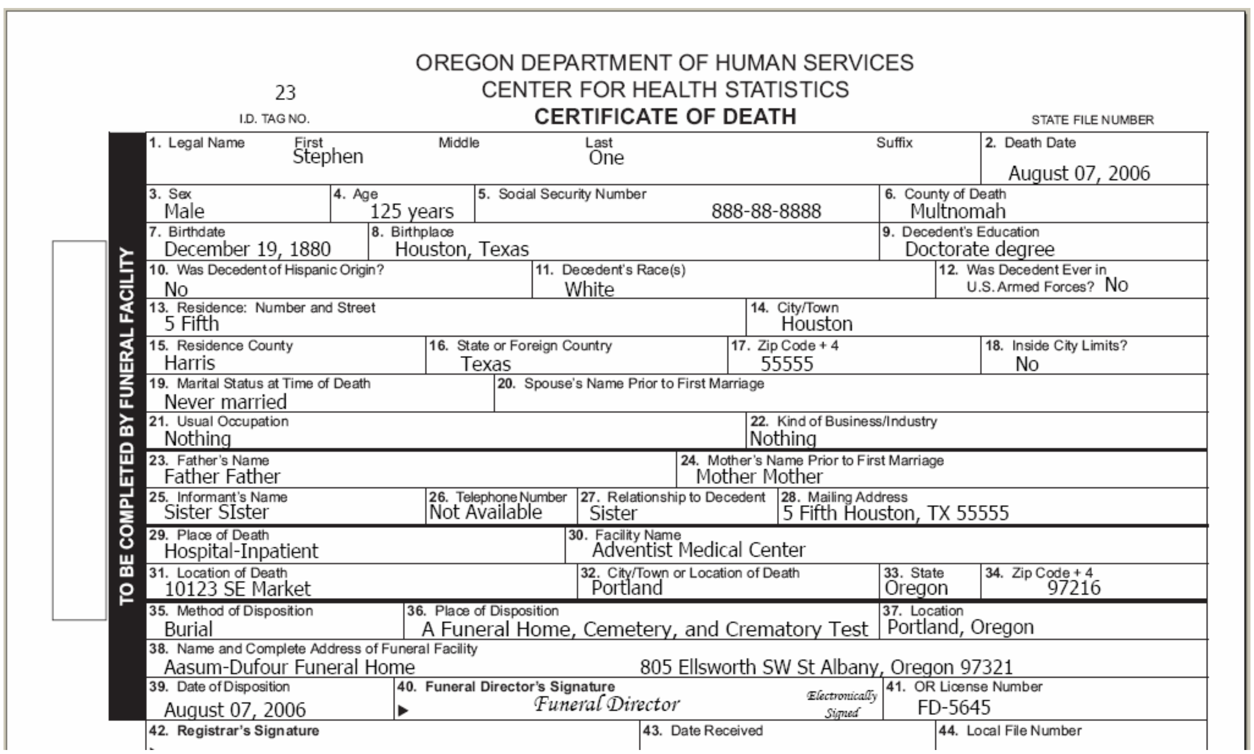
Selecting **OK** above will launch the **File Download** page shown below. Select **Open** to launch the Adobe Acrobat application to view and print the certificate.



Once the document displays, you can use the Adobe application to print the certificate.



OREGON DEPARTMENT OF HUMAN SERVICES
CENTER FOR HEALTH STATISTICS
CERTIFICATE OF DEATH

23
I.D. TAG NO.

STATE FILE NUMBER

TO BE COMPLETED BY FUNERAL FACILITY

1. Legal Name — First: Stephen; Middle; Last: One; Suffix
2. Death Date: August 07, 2006
3. Sex: Male
4. Age: 125 years
5. Social Security Number: 888-88-8888
6. County of Death: Multnomah
7. Birthdate: December 19, 1880
8. Birthplace: Houston, Texas
9. Decedent's Education: Doctorate degree
10. Was Decedent of Hispanic Origin? No
11. Decedent's Race(s): White
12. Was Decedent Ever in U.S. Armed Forces? No
13. Residence: Number and Street: 5 Fifth
14. City/Town: Houston
15. Residence County: Harris
16. State or Foreign Country: Texas
17. Zip Code + 4: 55555
18. Inside City Limits? No
19. Marital Status at Time of Death: Never married
20. Spouse's Name Prior to First Marriage
21. Usual Occupation: Nothing
22. Kind of Business/Industry: Nothing
23. Father's Name: Father Father
24. Mother's Name Prior to First Marriage: Mother Mother
25. Informant's Name: Sister SIster
26. Telephone Number: Not Available
27. Relationship to Decedent: Sister
28. Mailing Address: 5 Fifth Houston, TX 55555
29. Place of Death: Hospital-Inpatient
30. Facility Name: Adventist Medical Center
31. Location of Death: 10123 SE Market
32. City/Town or Location of Death: Portland
33. State: Oregon
34. Zip Code + 4: 97216
35. Method of Disposition: Burial
36. Place of Disposition: A Funeral Home, Cemetery, and Crematory Test
37. Location: Portland, Oregon
38. Name and Complete Address of Funeral Facility: Aasum-Dufour Funeral Home 805 Ellsworth SW St Albany, Oregon 97321
39. Date of Disposition: August 07, 2006
40. Funeral Director's Signature: Funeral Director — Electronically Signed
41. OR License Number: FD-5645
42. Registrar's Signature
43. Date Received
44. Local File Number

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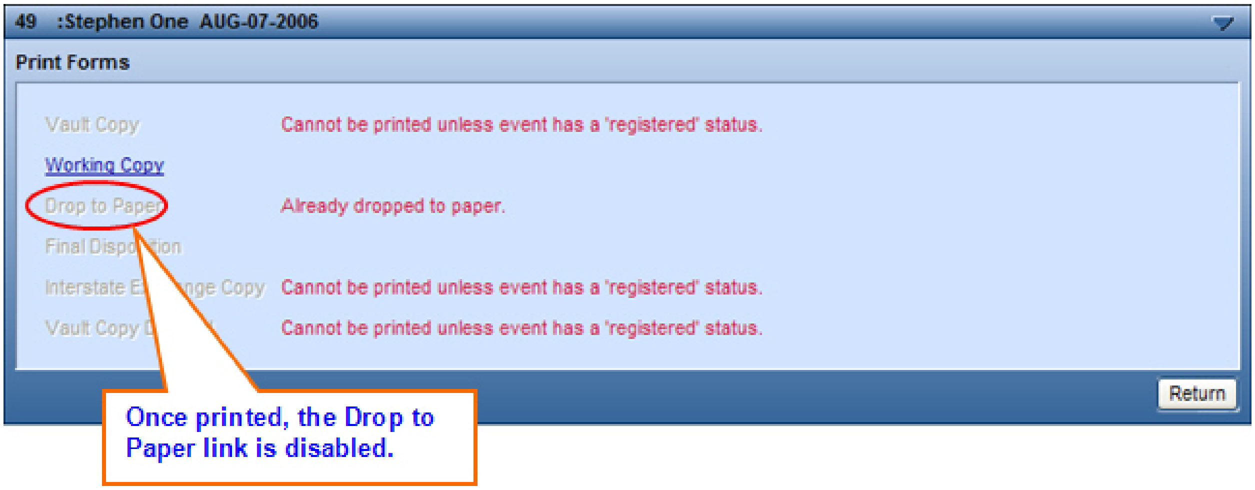
Certificates can only be dropped to paper once. Afterwards, the link is disabled.



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Relinquish Case

Once a Physician, Medical Examiner or Funeral Home Director has taken "ownership" of a record no other user will be allowed "write access" to the record. That is, only that physician, medical examiner, or funeral home director can make changes to the record.

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

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

From the **Relinquish Case –Web Page Dialog**, select **OK** to relinquish control or **Cancel** to retain ownership of the record.

To regain control of the record, access it from the **Life Events -> Death -> Search** link. A dialog will pop up asking the user if they want to take ownership of the record.

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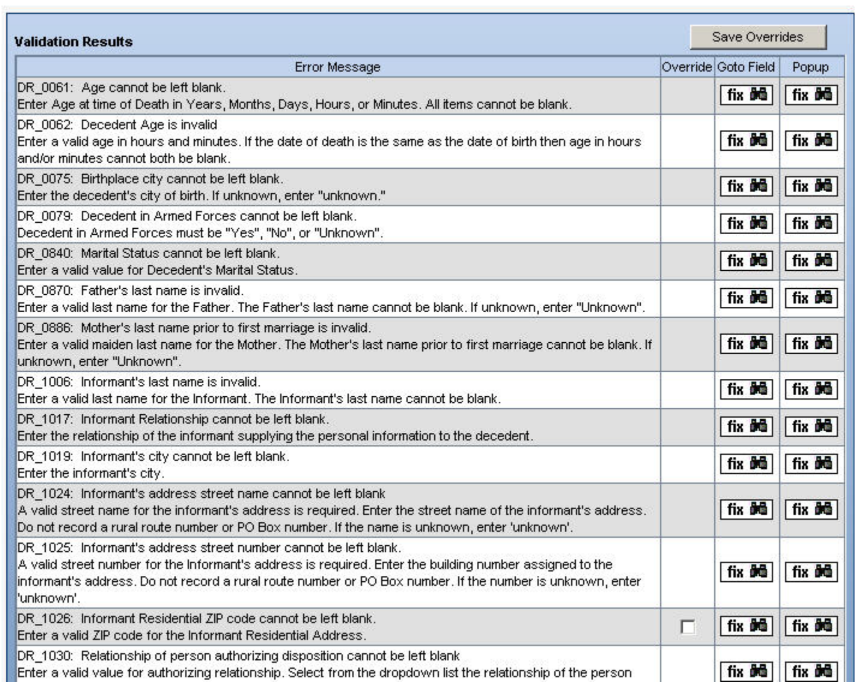
Validate Registration

The **Validate Registration** page does not have any controls such as click buttons or text entry boxes. This page serves as a Final Review of the Death Registration and is intended to show the user any outstanding issues such as missing or invalid data.

Clicking on the **Validate Registration** link on the **Other Links** sub-menu causes the **DAVE™** application to internally review every page of information that has been submitted. When the review is finished, the page will refresh with a display of all the errors that were found. (see below)

From the **Death Registration Menu**, select **Other Links -> Validate Registration**.

As you can see, **DAVE™** found many errors with this particular registration.


Validation Results — Save Overrides

Error Message	Override	Goto Field	Popup
DR_0061: Age cannot be left blank. Enter Age at time of Death in Years, Months, Days, Hours, or Minutes. All items cannot be blank.		fix	fix
DR_0062: Decedent Age is invalid Enter a valid age in hours and minutes. If the date of death is the same as the date of birth then age in hours and/or minutes cannot both be blank.		fix	fix
DR_0075: Birthplace city cannot be left blank. Enter the decedent's city of birth. If unknown, enter "unknown."		fix	fix
DR_0079: Decedent in Armed Forces cannot be left blank. Decedent in Armed Forces must be "Yes", "No", or "Unknown".		fix	fix
DR_0840: Marital Status cannot be left blank. Enter a valid value for Decedent's Marital Status.		fix	fix
DR_0870: Father's last name is invalid. Enter a valid last name for the Father. The Father's last name cannot be blank. If unknown, enter "Unknown".		fix	fix
DR_0886: Mother's last name prior to first marriage is invalid. Enter a valid maiden last name for the Mother. The Mother's last name prior to first marriage cannot be blank. If unknown, enter "Unknown".		fix	fix
DR_1006: Informant's last name is invalid. Enter a valid last name for the Informant. The Informant's last name cannot be blank.		fix	fix
DR_1017: Informant Relationship cannot be left blank. Enter the relationship of the informant supplying the personal information to the decedent.		fix	fix
DR_1019: Informant's city cannot be left blank. Enter the informant's city.		fix	fix
DR_1024: Informant's address street name cannot be left blank A valid street name for the informant's address is required. Enter the street name of the informant's address. Do not record a rural route number or PO Box number. If the name is unknown, enter 'unknown'.		fix	fix
DR_1025: Informant's address street number cannot be left blank. A valid street number for the Informant's address is required. Enter the building number assigned to the informant's address. Do not record a rural route number or PO Box number. If the number is unknown, enter 'unknown'.		fix	fix
DR_1026: Informant Residential ZIP code cannot be left blank. Enter a valid ZIP code for the Informant Residential Address.	☐	fix	fix
DR_1030: Relationship of person authorizing disposition cannot be left blank Enter a valid value for authorizing relationship. Select from the dropdown list the relationship of the person		fix	fix

More than just a listing of edit failures, the Validate Registration page also enables you to find the listed errors and correct them. There are two different ways to locate and correct errors:

Notice in the figure below the two columns to the far right of the error grid entitled **Goto Field** and **Popup**. Inside of each cell is the **fix** icon (fix).

Error Message	Override	Goto Field	Popup
DR_0061: Age cannot be left blank. Enter Age at time of Death in Years, Months, Days, Hours, or Minutes. All items cannot be blank.		fix	fix

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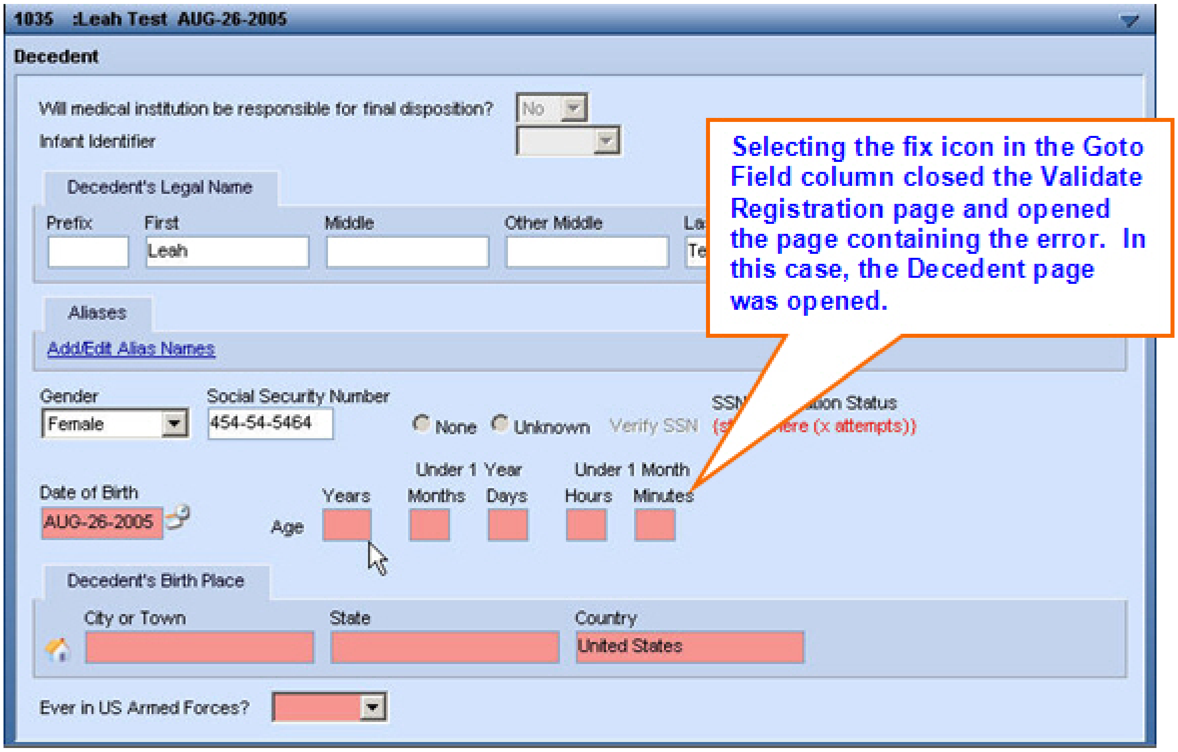
Clicking on the **fix** icon within any error messages **Goto Field** column will close the Validate Registration page and open the page that contains the actual error.



Notice that the **Date of Birth** and **Age** entry text boxes are highlighted in red. Red indicates that these are 'hard' edit failures that must be corrected before registration can occur.

Notice also that the **Decedent's Birth Place** tab and the **Ever in US Armed Forces?** dropdown list are also highlighted in red. Using the **Goto Field** fix option enables the user to fix multiple errors one the same page at one time.

The other option for correcting errors is the **fix** icon in the **Popup** column.

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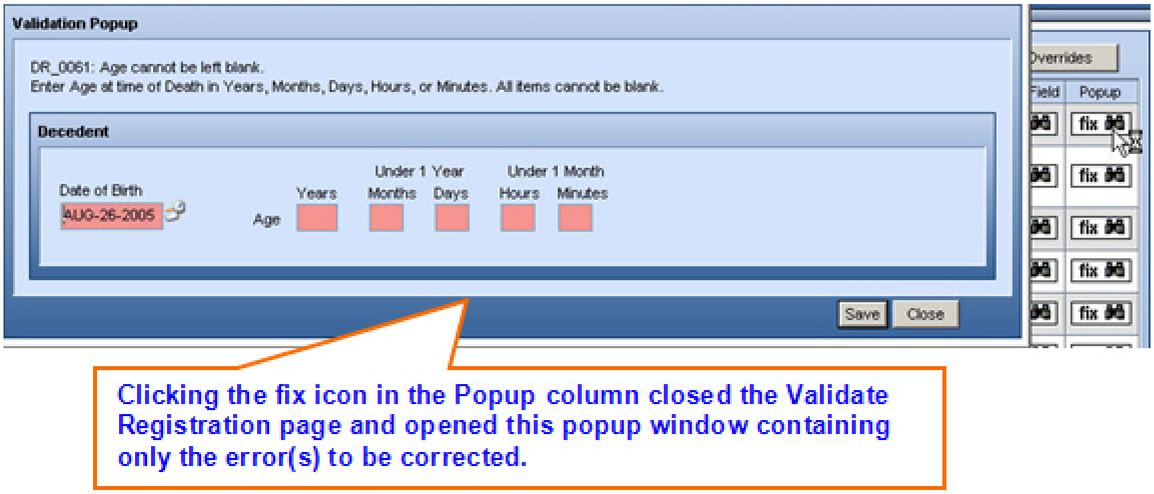
Clicking on the **fix** icon in the **Popup** column will cause a window to pop onscreen allowing the user to correct that particular error.



Notice that the only error that can corrected using the **Popup** option is the specific error listed in that single row of the **Validate Registration** error control. This feature is useful if there are only one or two errors to correct.

If there are multiple errors to correct then it is best to use the **Goto Field** option as that will display an entire page and all of its related errors at once.

Once all listed errors have been corrected, click on the Validate Registration link once again to verify that no errors remain.

Which Correction Option is Best?

Use the *Goto Field* option when you have multiple errors to correct. *Goto Field* displays entire pages at a time enabling you to fix many errors at once.

Use the *Popup* option when there are only one or two errors to correct.

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Queues

As death registration cases work their way through the **DAVE™** system, they will pass from one work queue to another. **Queues** are categories or status levels associated with death records.

Work Queues - Overview

From the **Main Menu**, select **Queues**. This will bring up a listing of all the available work queues containing cases. **Queues** contain registrations, orders, or amendments having a work queue status. If a queue does not contain any cases it will not be displayed in the list. Additionally, if a user does not have security access to a specific queue it will not appear in the list.

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

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

Registration Work Queue Summary

Queue Name	Count	Age of Oldest in Days
FIPS Coding Required	34	36
GIS Coding Required	61	36
ICD Coding Required	61	36
Medical Certification Requested	7	32
Medical Pending	15	33
Personal Pending	28	36
Potential Duplicate	26	36
Registration Approval Required	1	29
Signature Required	2	29
Temp Registration Work Queue 2	1	12
		Total Queues : 10

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

Click on any **Queue Name** to view a list of the death cases currently in that queue. In the example shown here there are 2 cases in the **Registration Approval Required** queue.

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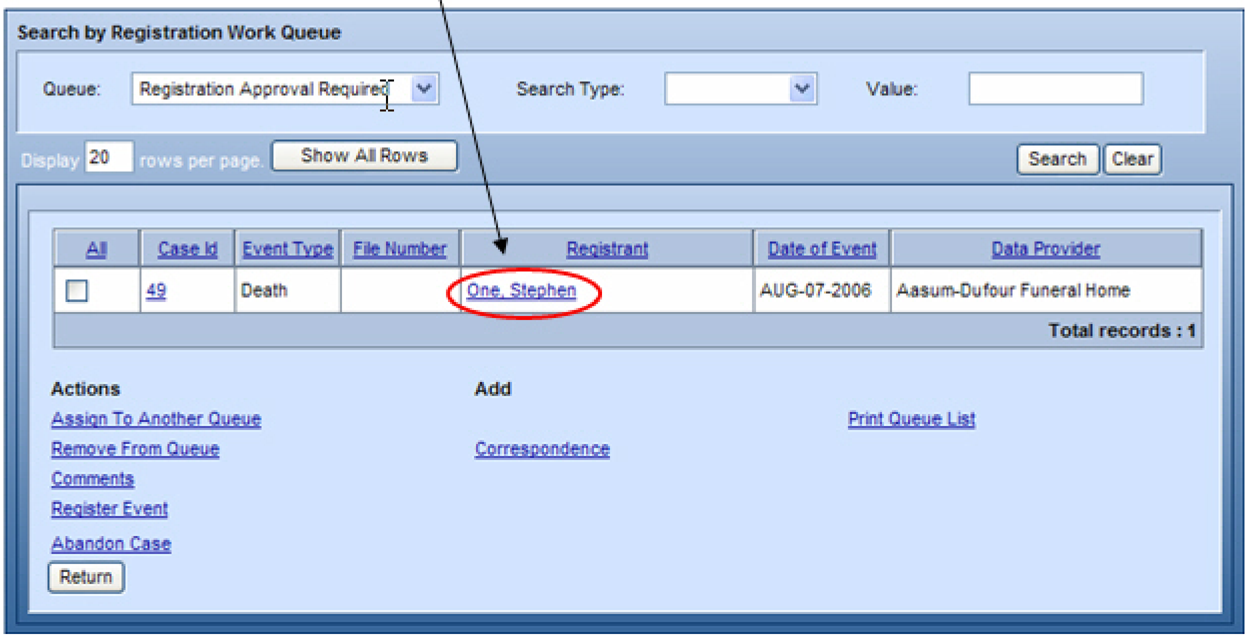
Registration Approval Required	1	29
Signature Required	2	29
Temp Registration Work Queue 2	1	12
		Total Queues : 10

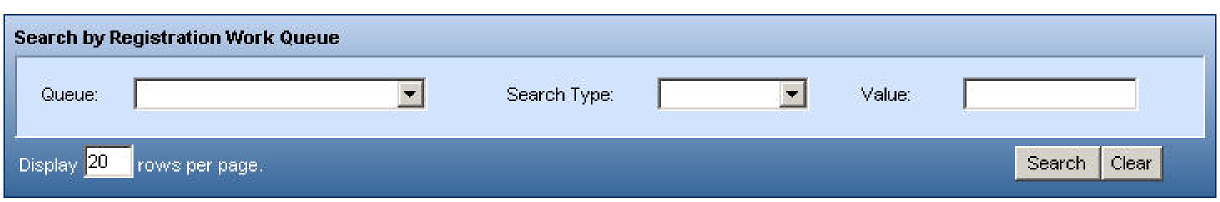
Click on the **Registrant** name link to display that record for review or editing.



Now, lets examine how to search for cases based on their queue status.

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

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



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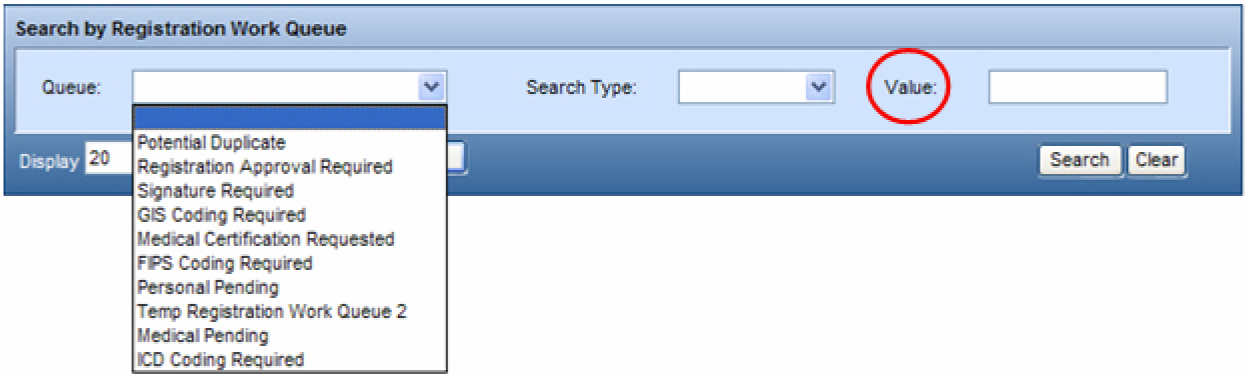
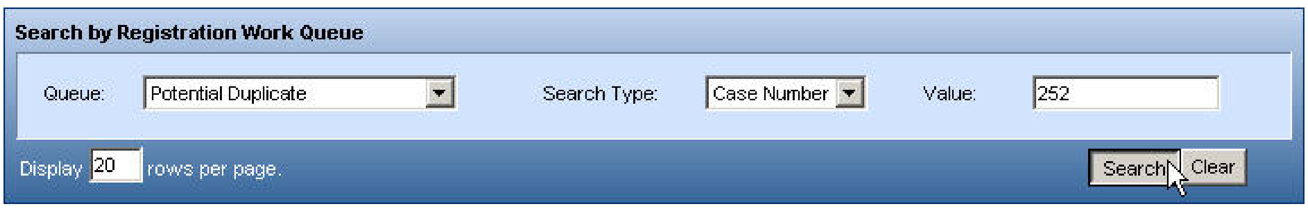
Select one of the available options from the **Queue**, or **Search Type** dropdown list or enter a value to search for in the **Value** text-entry box.

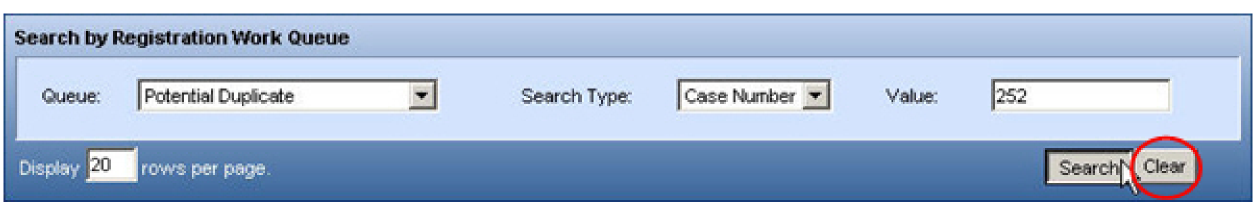


To narrow your search you can use all three or a combination of the three search parameters. However, you must always make a selection from the **Queue** dropdown list.



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

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



Now, let's take a look at how to use the **Assign to Another Queue** functionality to move a death record from one work queue to another.

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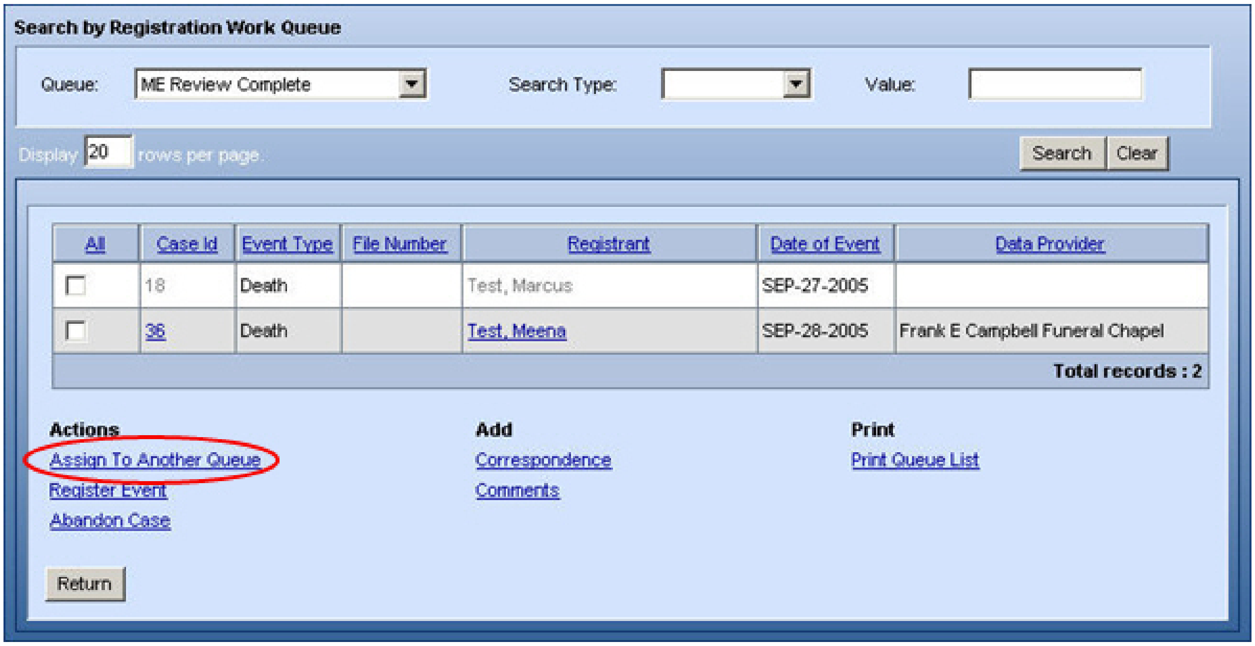
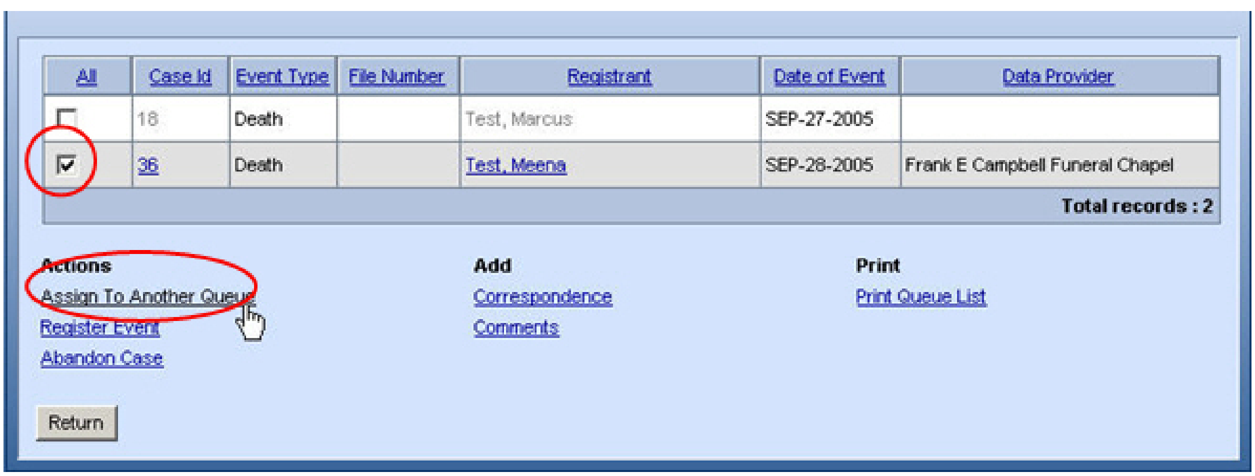
Sometimes, there may be many records in a single queue. In order to help evenly distribute the work load and more efficiently process records, cases can be moved into temporary work queues that are then assigned to specific personnel.



If a death case needs to be moved from one queue to another, put a checkmark (☑) in the checkbox ☐ next to the case to be re-assigned and click the **Assign To Another Queue** link.



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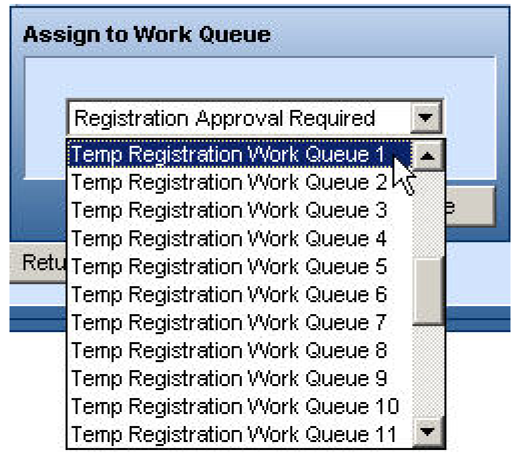
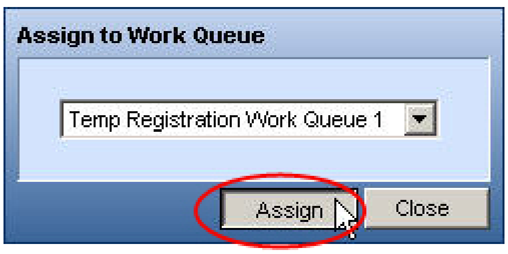
A dropdown list of the available queues will open.





Once the appropriate queue has been selected, click on the **Assign** button to move the case to the new queue. Again, this will vary based on user type and user security setup.

If the Assign button is grayed out then that case cannot be moved to the selected queue.

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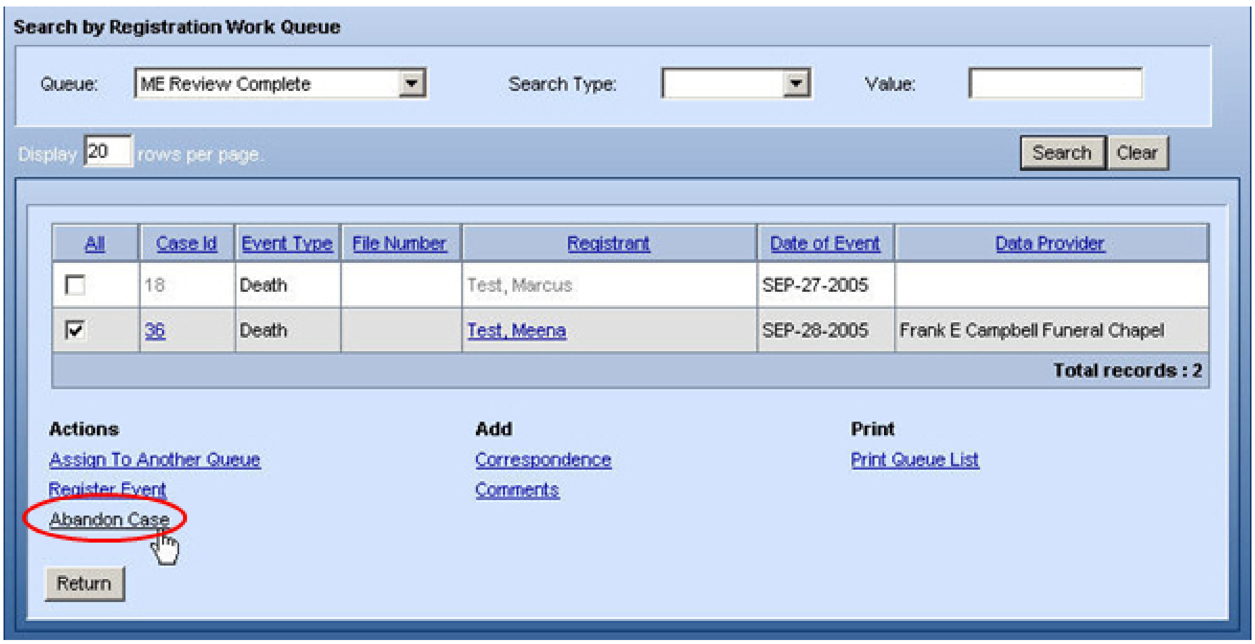
Abandon Case

Abandon Case is used by the registration office when it is determined that a record is an orphaned record; one that was started by a funeral home or medical certifier but never completed.

Additionally, the **Abandoned** status will be system assigned when it is determined that the jurisdictionally defined time limit has been exceeded for completion of cases.

To **Abandon** a case, put a checkmark ☑ in the checkbox ☐ next to the case to be abandoned.



Select the **Abandon Case** link. Upon selection of the **Abandon Case** link and the redraw of the page, the record will become disabled. No further work may be performed on a case once it has been abandoned.

To access the various queues found within the **DAVE™** application, select **Queues** from the **Main Menu**. In the following sections, we will examine the three different types of **Work Queues**: **Registration**, **Order**, **Issuance**, and **Amendment**.

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Registration Work Queues

Death registration cases in the **Registration Work Queues** represent records that are still missing certain pieces of information or that still require one or more layers of processing.

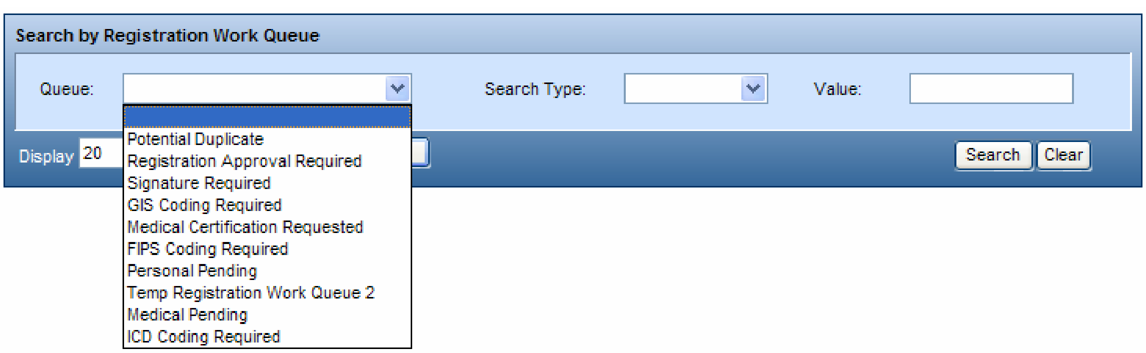
Sometimes these are cases that cannot be registered due to missing information. In many cases, though, a record can be missing some data or processing and still be registered. For example, a record that is still waiting on **FIPS coding** will be found in a **Registration Work Queue**, but can still be registered.

However, cases in the **Cause of Death Pending** queue cannot be registered until they have been moved from that queue.

Other registration work queues include:

- **Potential Duplicate**
- **Registration Approval Required**
- **Signature Required**
- **GIS Coding Required**
- **Medical Certification Requested**
- **FIPS Coding Requested**
- **Personal Pending**
- **Temp Registration Work Queues**
- **Medical Pending**
- **ICD Coding Requested**

To access the registration related queues, select **Queues -> Registration Work Queues** from the **Main Menu**. This will open the **Search by Registration Work Queue** page shown below.



Clicking on the **Queue:** dropdown lists will reveal a listing of all the various sub-queues that represent the **Registration Work Queue**. From here you can search from specific records within this queue.

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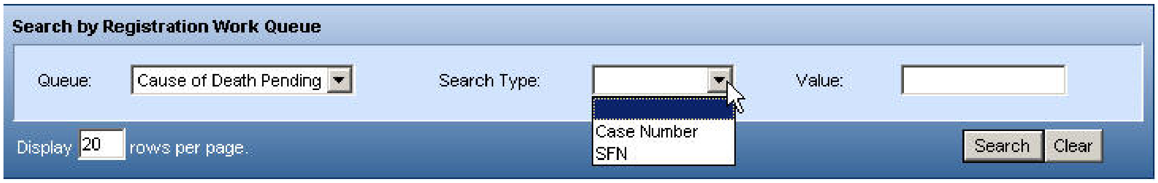
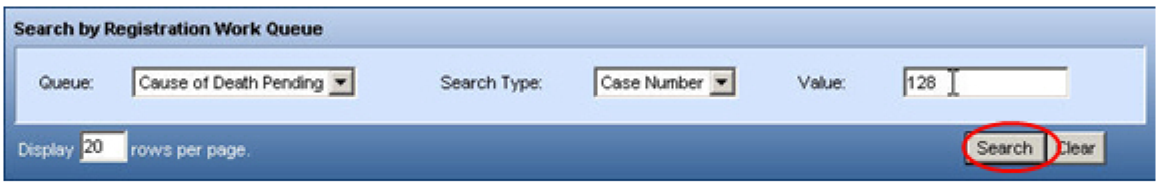
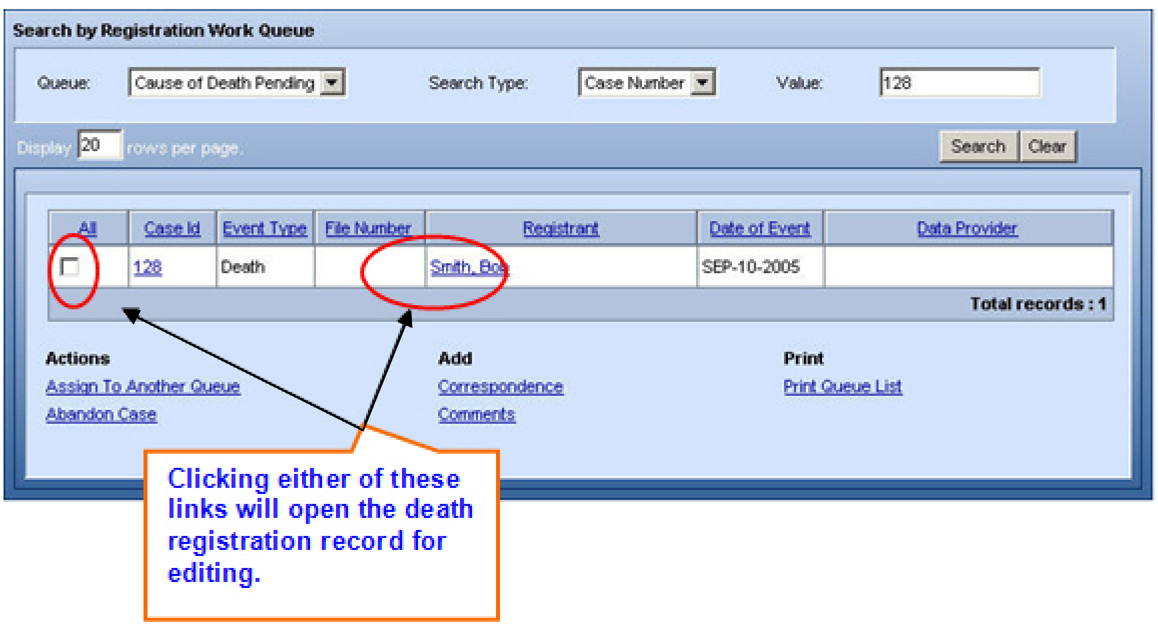
Next, make a selection from the **Search Type:** dropdown list; either a search by state file number (**SFN**) or **Case Number**.



Lastly, enter the numeric value corresponding the either the **Case Number** or **SFN** that you wish to search for and click the **Search** button.



This search yields the following results:



The user can now open the record by clicking on the **CaseID** number or the **Registrant** name. Additionally, the following functions can be performed by placing a checkmark in the checkbox under in the **All** column and clicking one of the links:

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Note: It is possible to view all the records in a specific queue by making a selection from the Queue dropdown list and NOT making a selection from the Search Type and Value controls. If you do this then all records in that queue will be displayed. However, if any selection is made from the Search Type dropdown list then a corresponding entry must be made in the Value control or an error will be generated.

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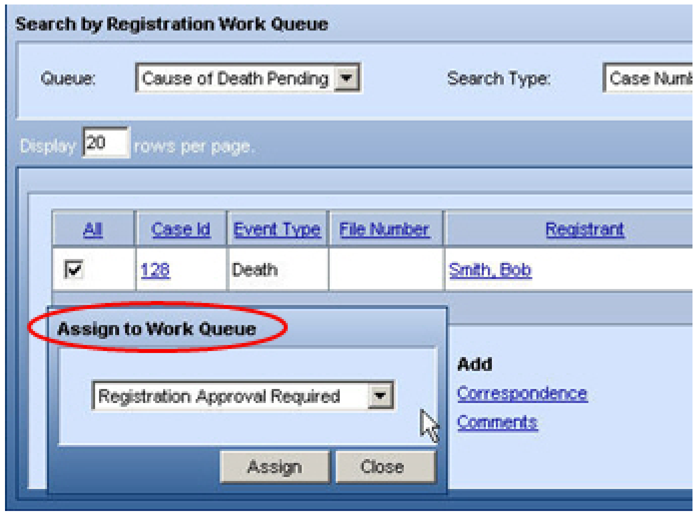
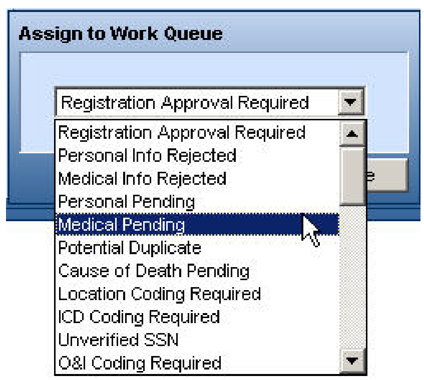
Actions – these links allow you to process actions against a record or case

Assign to Another Queue

Place a checkmark in the **All** column of the record to be accessed, then click on the **Assign to Another Queue** link. The **Assign to Work Queue** window will display on the page.



From the dropdown list, select the **Work Queue** that the record is to be moved to and click the **Assign** button. This will re-assign the record to a different queue.



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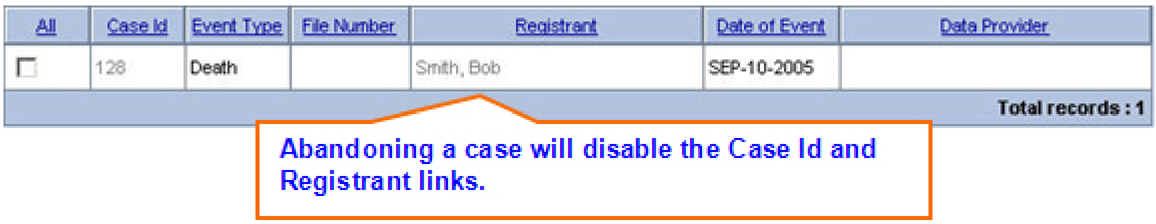
Abandon Case

Occasionally, it may become necessary to abandon a record. Perhaps the case has been in the system too long without being completed or maybe the record is a duplicate of another record. If a case needs to be abandoned, the place a checkmark in the checkbox in the **All** column and click the **Abandon Case** button.



The page will refresh and the selection links under **Case ID** and **Registrant** become disabled.

Important Note: Once a case has been abandoned it cannot be edited or restored. Abandoning is permanent.

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Add Correspondence

Occasionally, it is necessary for the State to correspond with its vital records partners or with vital records applicants. For example, most jurisdictions have Query Letters that they regularly send to Funeral Homes or Medical Offices requesting additional information that is needed in order to complete and certify a record.

Also, local offices often send letters to customers notifying them of a 'no record found' situation or simply to notify them that they are not eligible to receive a certified copy of a record. To facilitate the sending of these letters, the **DAVE™** system include a **Correspondence** feature.

The **Correspondence** feature allows the state to build 'template' documents that contain standard wording and 'blanks' that can be filled in with customer or partner specific information. For example, the State may build a correspondence template explaining that an applicant is not eligible to receive a record. The main body of the letter will always be the same, but the applicant information will always be different. So the template is built containing the standard wording, but the recipient information is left blank. Using the **Correspondence** feature, the template is stored in the system and, when needed, is printed from a record with information specific to that record or applicant.

From the **Search by Registration Work Queue** page, locate and click the **Correspondence** link.

The **Correspondence** dialog will open and display a listing of correspondences that have been issued on this record.

In the example above, no correspondences have yet been sent. To initiate a new correspondence, click the **New Correspondence** button.

The **New Correspondence – Registration** dialog will open and display a list of the correspondence documents available in the system. Click the **Select** link to continue.

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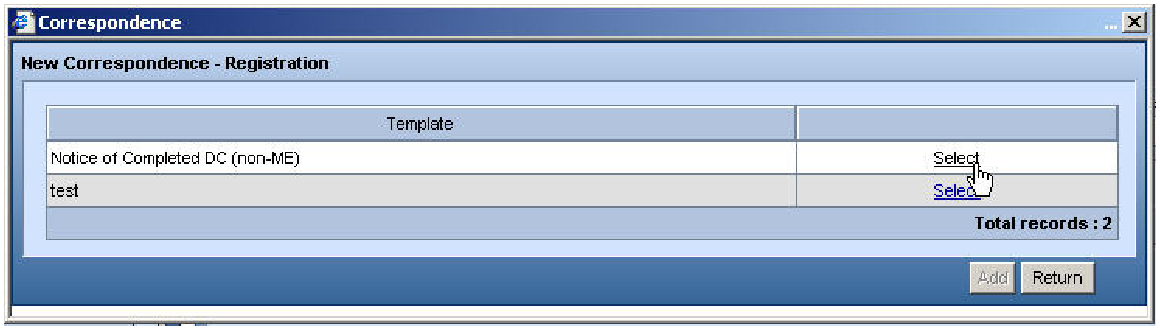
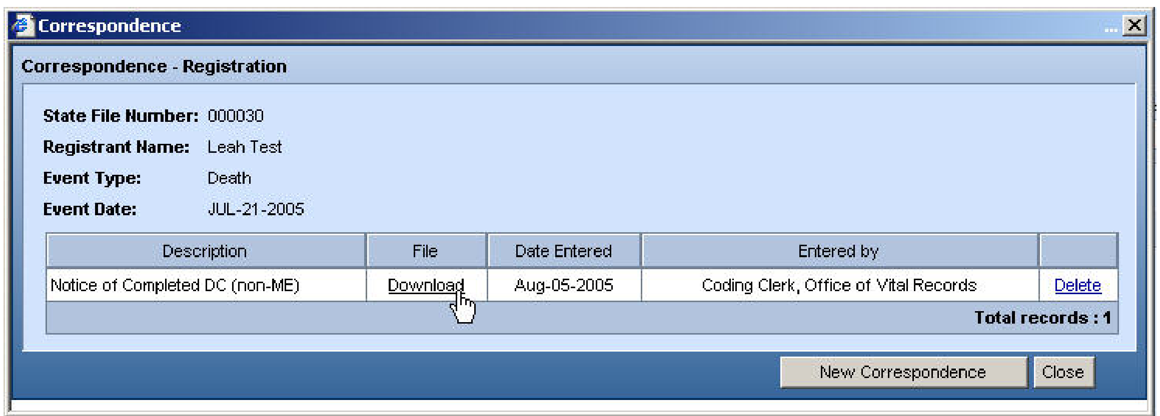
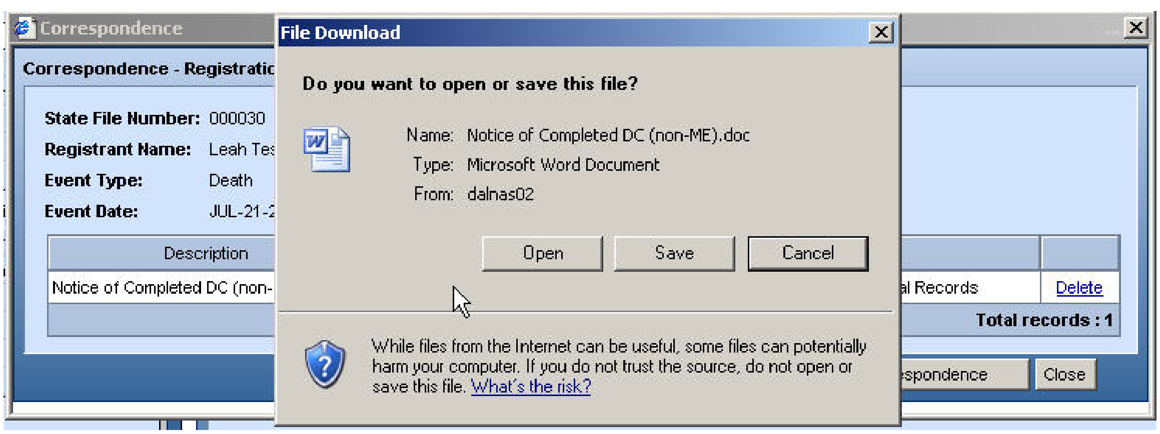


From the **File** column, select **Download** to download the available 'Notice of Completed DC (non-ME)' file.



This will bring up the **File Download** dialog. Select **Open** to continue.



The first time that a user accesses a correspondence letter, they will be prompted to download an XML expansion pack from the Insurity office in Richardson, TX. Select **Yes** to continue.

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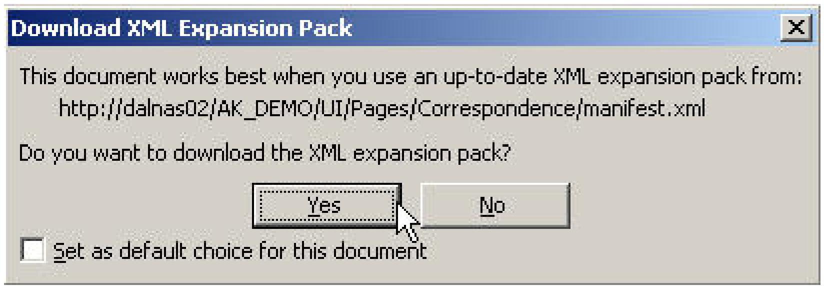

Selecting **Yes** above will launch the actual MSWord template and auto-fill the record specific data. The correspondence is now ready to be printed and mailed. The letter can also be saved to a hard disk for future use.

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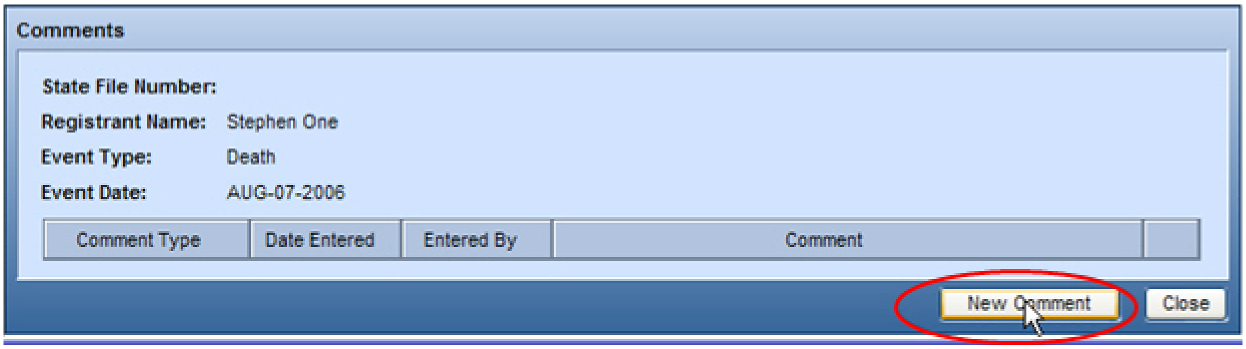
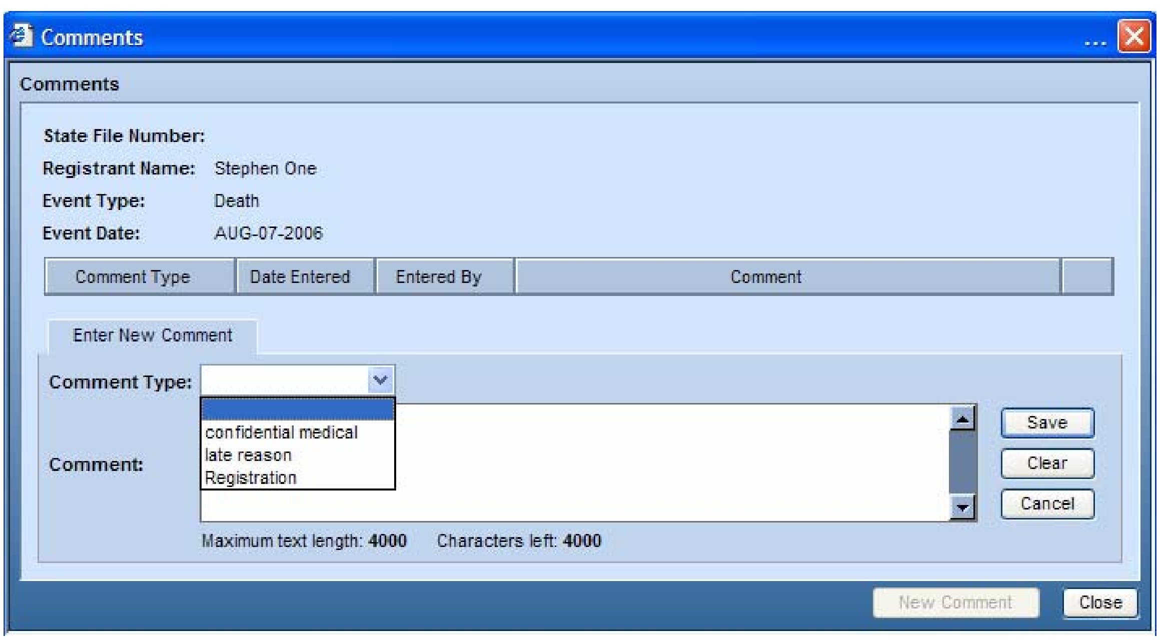
Comments

Comments are messages that you can associate with a particular record. These might be reminder notes to yourself concerning special conditions associated with the record or notes left behind so that other users will be aware of those special conditions.

Selecting the **Comments** link will open the dialog shown below. Here you will see a listing of previously left comments. Select the **New Comment** link to leave a new comment.



First, select a comment type from the **Comment Type** dropdown list. Every comment must be associated with a **Comment Type**. For the sake of this example, we have selected **Confidential Medical** as our type. Tab over to the **Comment** text box and add your new comment. Comments can be up to 4000 characters in length. Keep in mind, though, that spaces count as characters.



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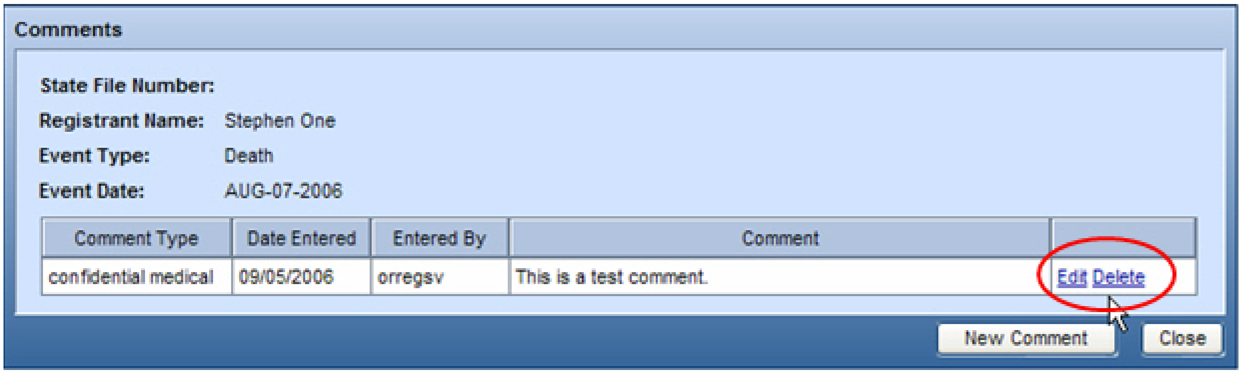
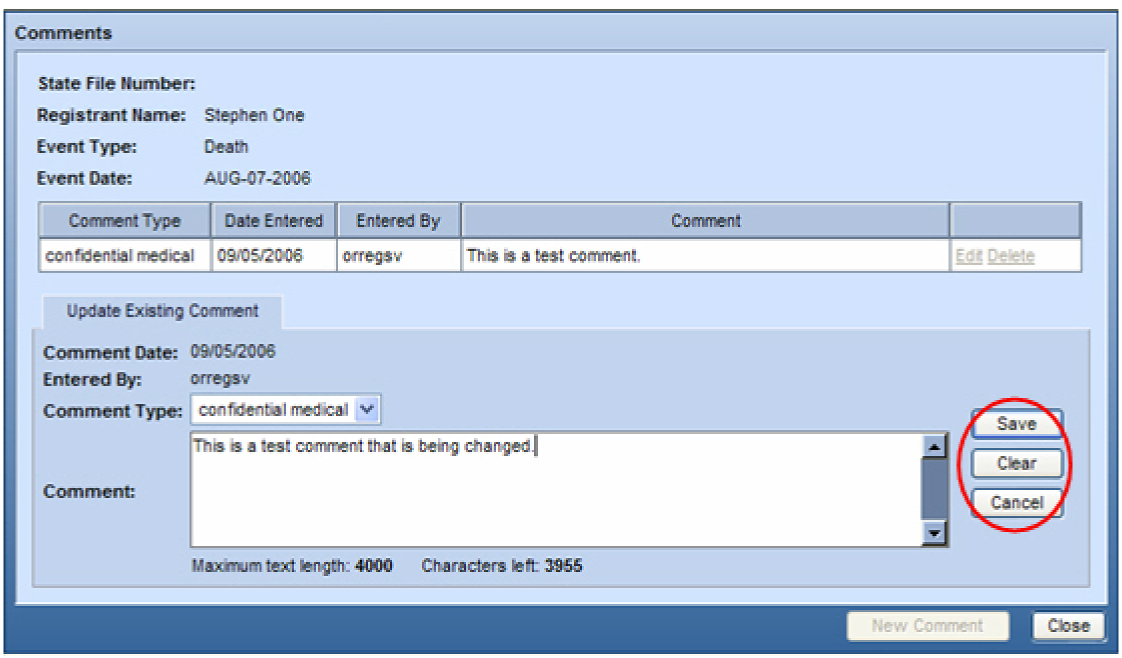
Once you have added your comment, click the **Save** button to save your comment, **Clear** to empty the **Comment** text box and start over, or **Cancel** to close the **Comments** dialog without saving your comment.



Once you have saved your message, it will appear in the **Comments** list. Notice that you can either **Edit** or **Delete** the link now. Click on the **Edit** or **Delete** link to change or remove the comment. By using these links, you can change the comment, add to it, or clear it out entirely.



Once you have edited the comment, click the **Save** button to save your changes, **Clear** to empty the Comment text box and start over, or **Cancel** to close the **Comments** dialog without saving your comment.

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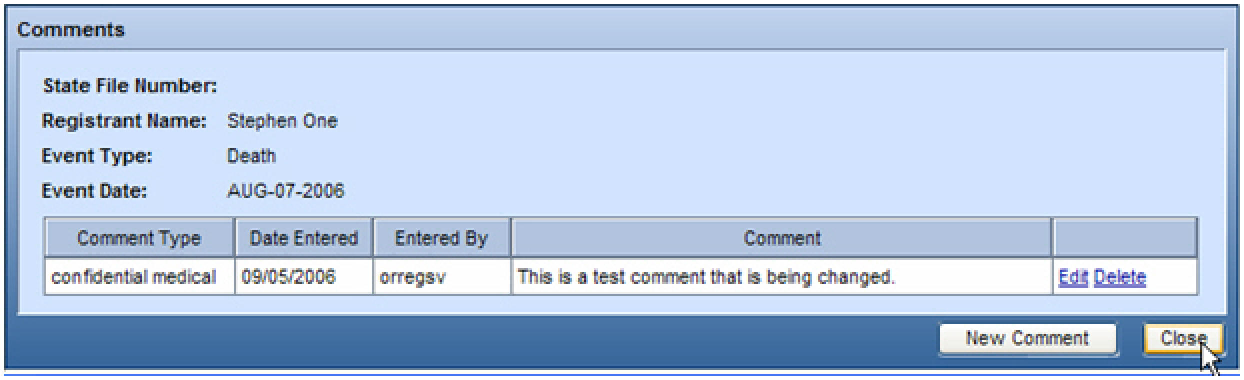

Select **Close** to exit the **Comments** dialog and return to the **Death Registration Menu**.

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Registration Work Queue Summary

Each work queue category has a corresponding summary page. These summaries can be selected from the **Main Menu** as shown below:

Registration Work Queue Summary

Queue Name	Count	Age of Oldest in Days
Cause of Death Pending	1	15
FIPS Coding Required	53	22
GIS Coding Required	53	22
ME Review Complete	1	20
Potential Duplicate	27	22
		Total Queues : 5

Clicking on the **Registration Work Queue Summary** link will display the page shown above.

Queue Name displays the names of the various queues that comprise the **Registration Work Queue**. **Count** indicates the number of records in the corresponding queue. **Age of Oldest in Days** indicates the age of the oldest record in that queue. Note that all of these column headers are underlined links, indicating that the table can be resorted by clicking on those links.

The summary queue can be valuable when a user does not have enough information to search for a record. Also, the summary page can be used as a 'to-do' list of records that need to be worked.

Clicking on any of the queue links shown…

Registration Work Queue Summary

Queue Name	Count	Age of Oldest in Days
Cause of Death Pending	1	15
FIPS Coding Required	53	22
GIS Coding Required	53	22
ME Review Complete	1	20
Potential Duplicate	27	22
		Total Queues : 5

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… will display that links' specific work queue. (see below) Using the techniques discussed above, the records within that queue can be accessed for editing and processing.

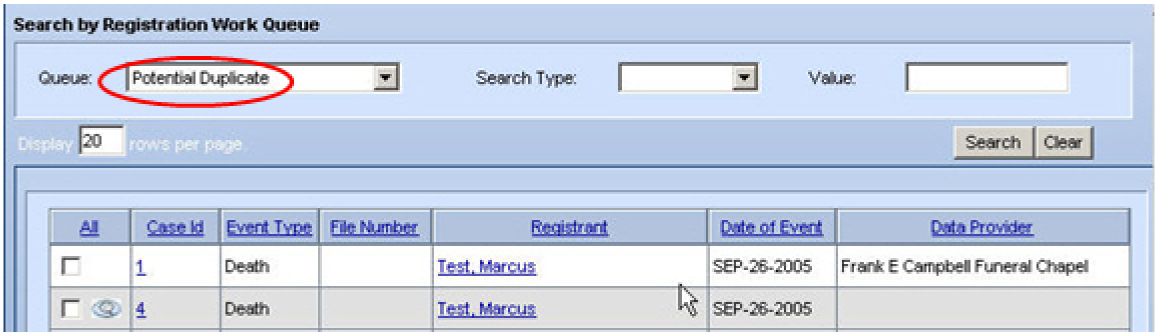

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Table Maintenance

The **Table Maintenance** feature of the **DAVE™** application is used by administrative personnel to add **Users**, **Data Providers**, **Facilities,** and other entities to the system. Additionally, **Table Maintenance** is also used to add **System Codes**, **Status Codes**, **File Numbers, Reports,** and other system based information. The term "**Table Maintenance**" refers to the fact that all of this system information is stored in the **DAVE™** database tables.

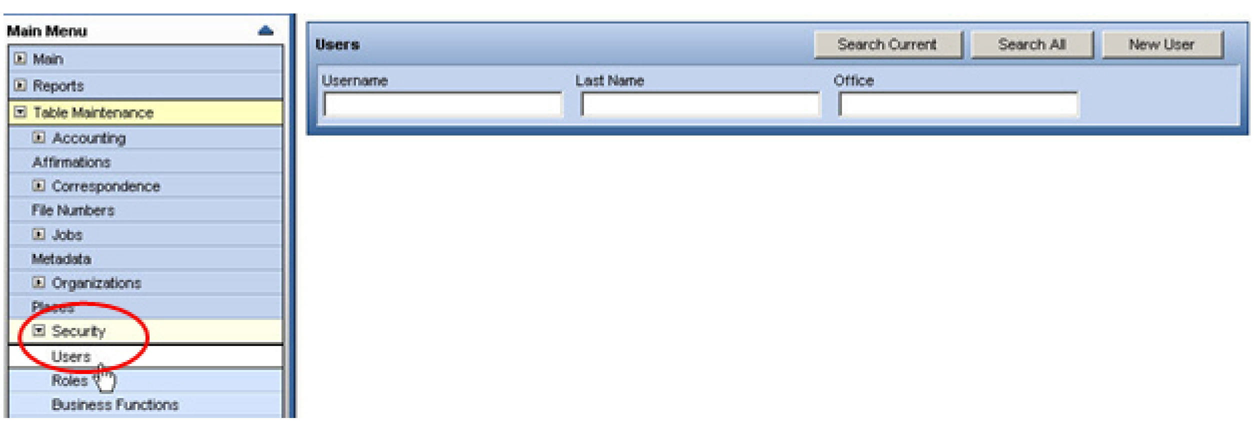
For example, the **Table Maintenance -> Security -> Users** feature would be used to add, edit, or remove users from the system. As information is added, edited, or deleted, the underlying **DAVE™** database tables are modified accordingly.

As mentioned above, only administrative personnel will have access to the **Table Maintenance** features of the **DAVE™** application. To perform **Table Maintenance** operations, log in using a system administrator **User Name** and **Password**. Then, select **Main Menu -> Table Maintenance.**

Security

Users

The **DAVE™** application features a simple, user-friendly interface for viewing, editing, and creating system users. To access this feature, select **Main Menu -> Table Maintenance -> Security -> Users**. The **Users** search page shown below will display. From this page, users can search for a specific user, return a listing of all users in the system, or create new users through the **DAVE™ New User** setup wizard.



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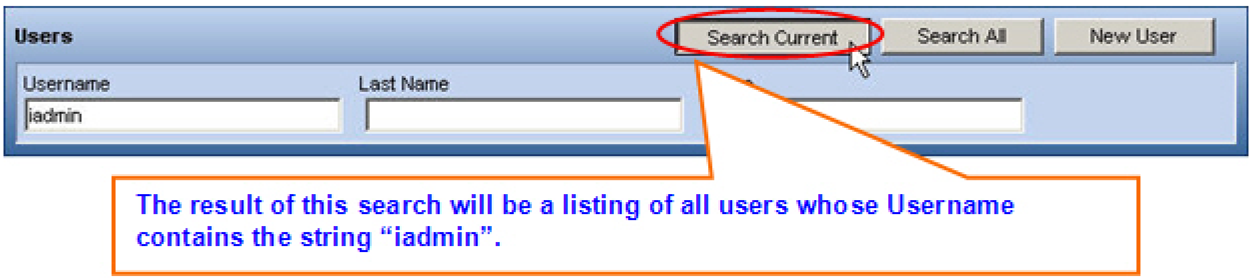
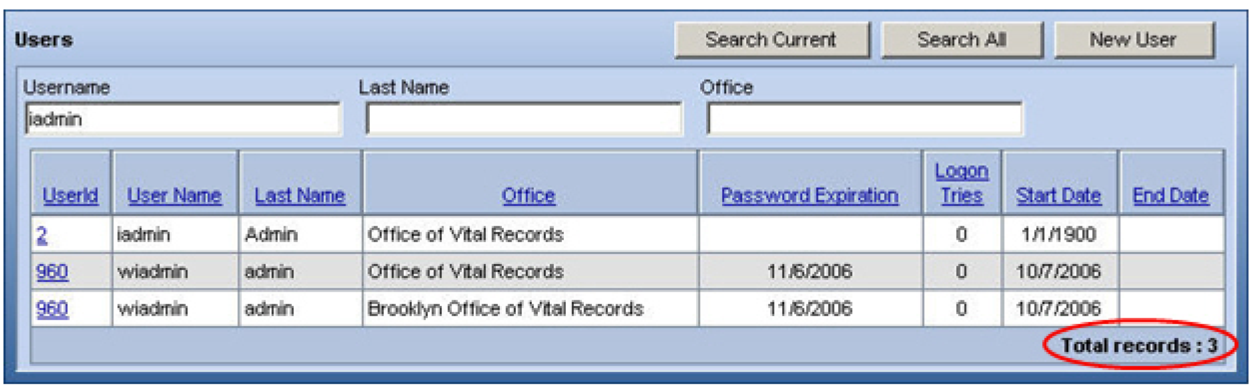
Note: the ability to select the various Table Maintenance features is based on user security privileges. You may or may not have access to these pages.

Search Current

To search for specific users within the system, enter either the **Username** or the user's **Last Name** and select the **Search Current** button:



As seen in the search results table below, **3 Total Records** were returned by this search.



UserId	User Name	Last Name	Office	Password Expiration	Logon Tries	Start Date	End Date
2	iadmin	Admin	Office of Vital Records		0	1/1/1900	
960	wiadmin	admin	Office of Vital Records	11/6/2006	0	10/7/2006	
960	wiadmin	admin	Brooklyn Office of Vital Records	11/6/2006	0	10/7/2006	

Total records : 3

Notice that each of the column headers in the above search results table are underlined links. Selecting any of these column header links will re-sort the results table according to that particular column's contents. The default sort order is by **UserId**.

In the example below, we have selected the **Office** link to re-sort the table of results:

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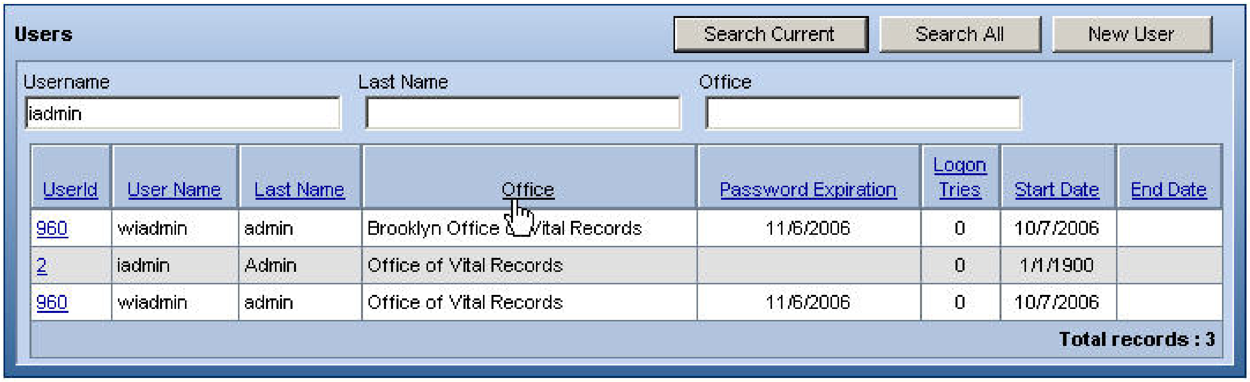


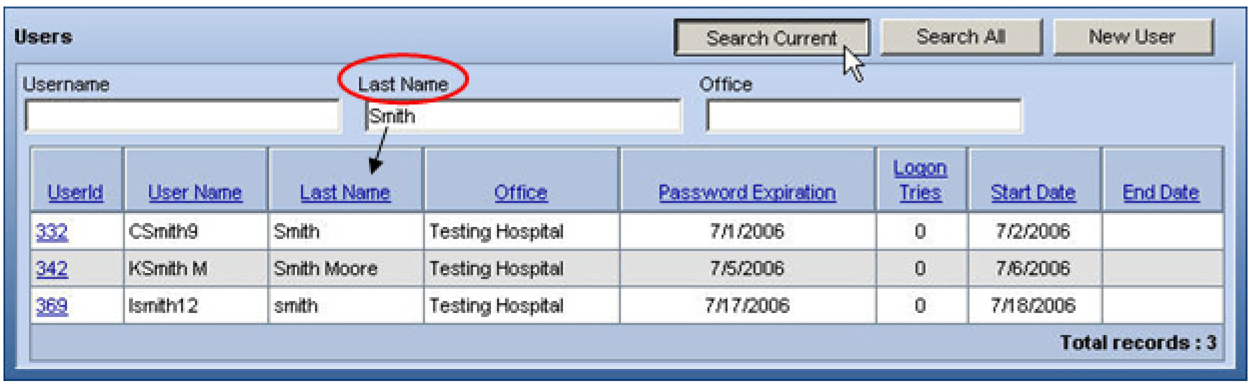
Users — Search Current | Search All | New User

Username: iadmin | Last Name: | Office:

UserId	User Name	Last Name	Office	Password Expiration	Logon Tries	Start Date	End Date
960	wiadmin	admin	Brooklyn Office of Vital Records	11/6/2006	0	10/7/2006	
2	iadmin	Admin	Office of Vital Records		0	1/1/1900	
960	wiadmin	admin	Office of Vital Records	11/6/2006	0	10/7/2006	

Total records : 3

Search Current can also be used to search for user, based on **Last Name**…



Users — Search Current | Search All | New User

Username: | Last Name: Smith | Office:

UserId	User Name	Last Name	Office	Password Expiration	Logon Tries	Start Date	End Date
332	CSmith9	Smith	Testing Hospital	7/1/2006	0	7/2/2006	
342	KSmith M	Smith Moore	Testing Hospital	7/5/2006	0	7/6/2006	
369	lsmith12	smith	Testing Hospital	7/17/2006	0	7/18/2006	

Total records : 3

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…or **Office**.

Users Search Current | Search All | New User

Username: [ ] Last Name: [ ] Office: Metropolitan

UserId	User Name	Last Name	Office	Password Expiration	Logon Tries	Start Date	End Date
949	ABurakgazi	Burakgazi	Metropolitan Hospital Center	9/1/2007	0	9/21/2006	
12	AlexMD	Doctore	Metropolitan Hospital Center	3/17/2008	0	2/18/2005	
261	almondg	Almond	Metropolitan Hospital Center	7/16/2008	0	6/16/2006	
883	APuplampu	Puplampu	Metropolitan Hospital Center	8/1/2009	0	8/23/2006	
405	ARodriguez	Rodriguez	Metropolitan Hospital Center	9/1/2010	0	7/26/2006	
412	ASoman	Soman	Metropolitan Hospital Center	7/1/2008	0	7/26/2006	
398	AValbuena	Valbuena	Metropolitan Hospital Center	7/1/2010	0	7/25/2006	
125	avallejo	Vallejo	Metropolitan Hospital Center	5/15/2008	0	5/15/2006	
795	BMoon	Moon	Metropolitan Hospital Center	8/1/2007	0	8/17/2006	
483	BShrestha	Shrestha	Metropolitan Hospital Center	8/1/2007	0	8/1/2006	

First 1 2 3 4 5 6 7 Last

Total records : 61

Additionally, **Search Current** can be used with a combination of any of the three search criteria to yield very specific results. In the following example we have used **Search Current** to return a listing of all users with a **Last Name** of **Moon** and an office association of **Metropolitan Hospital Center**:

Users Search Current | Search All | New User

Username: [ ] Last Name: Moon Office: Metropolitan

UserId	User Name	Last Name	Office	Password Expiration	Logon Tries	Start Date	End Date
795	BMoon	Moon	Metropolitan Hospital Center	8/1/2007	0	8/17/2006	

Total records : 1

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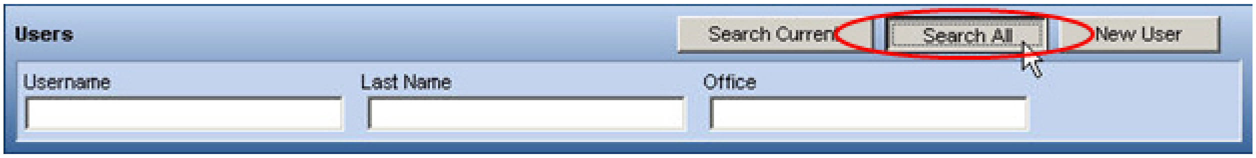
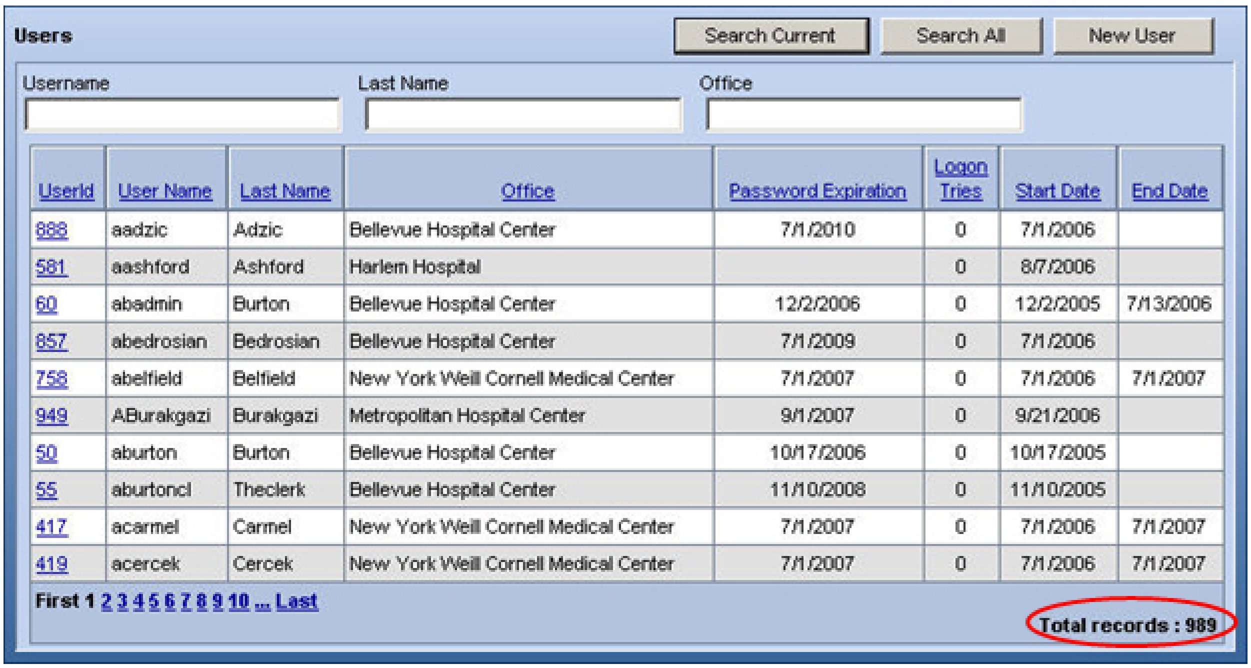
Search All

To return a listing of all users currently setup in the system, leave the search criteria controls empty and select **Search All**:



As shown below, this search returned **989 Total Records**.



UserId	User Name	Last Name	Office	Password Expiration	Logon Tries	Start Date	End Date
888	aadzic	Adzic	Bellevue Hospital Center	7/1/2010	0	7/1/2006	
581	aashford	Ashford	Harlem Hospital		0	8/7/2006	
60	abadmin	Burton	Bellevue Hospital Center	12/2/2006	0	12/2/2005	7/13/2006
857	abedrosian	Bedrosian	Bellevue Hospital Center	7/1/2009	0	7/1/2006	
758	abelfield	Belfield	New York Weill Cornell Medical Center	7/1/2007	0	7/1/2006	7/1/2007
949	ABurakgazi	Burakgazi	Metropolitan Hospital Center	9/1/2007	0	9/21/2006	
50	aburton	Burton	Bellevue Hospital Center	10/17/2006	0	10/17/2005	
55	aburtoncl	Theclerk	Bellevue Hospital Center	11/10/2008	0	11/10/2005	
417	acarmel	Carmel	New York Weill Cornell Medical Center	7/1/2007	0	7/1/2006	7/1/2007
419	acercek	Cercek	New York Weill Cornell Medical Center	7/1/2007	0	7/1/2006	7/1/2007

First 1 2 3 4 5 6 7 8 9 10 ... Last

Total records : 989

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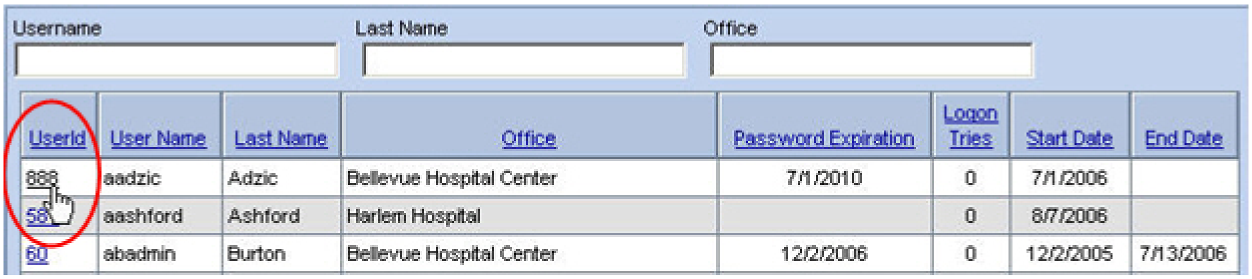
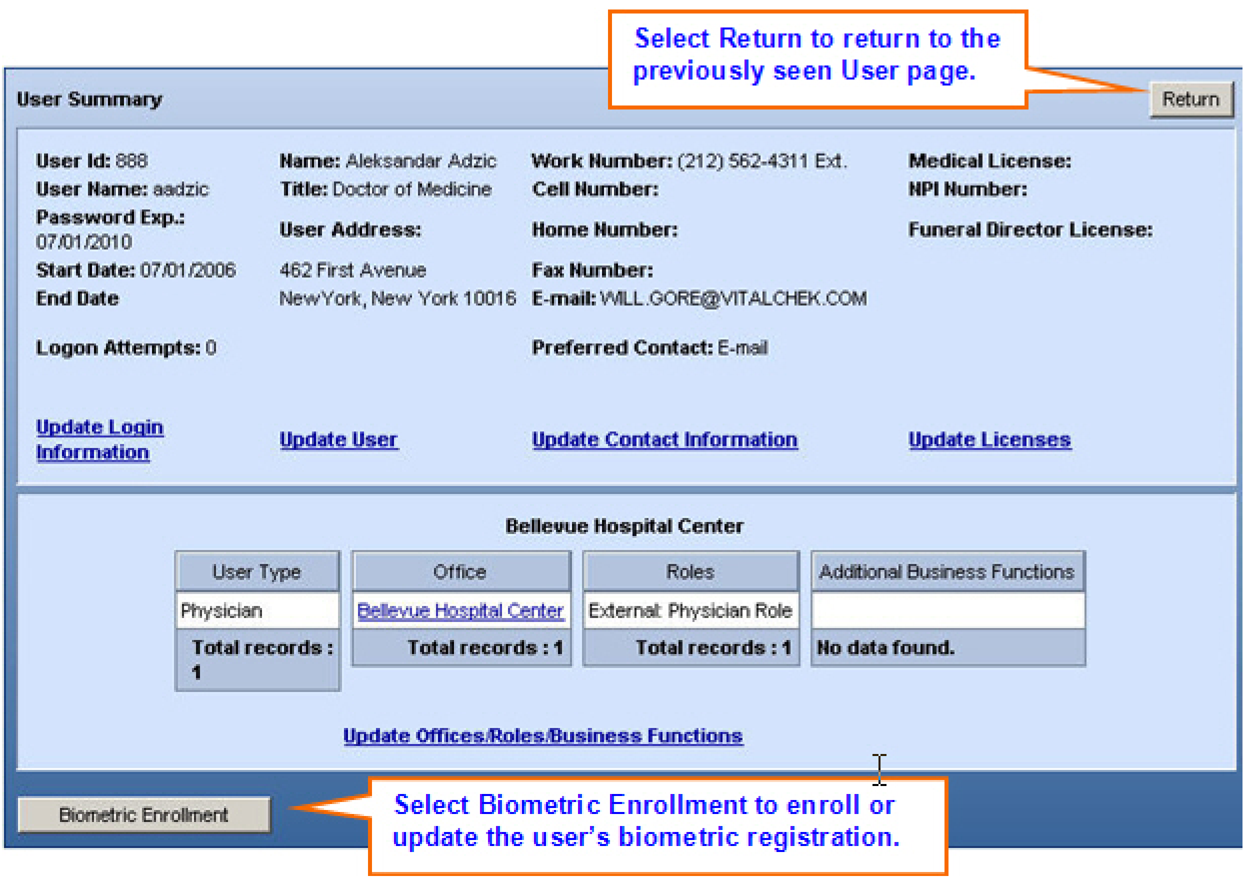
Update User

Regardless of the search method employed, notice that the **UserId** displayed for each user is actually an underlined link. Selecting any of these **UserId** links will open the **User Summary** page, enabling the user to view or edit the existing user's setup.



Selecting the **UserId** link above, opened the summary page shown here. Selecting any of the links on this page, **Update Login Information**, **Update User**, etc., will open a new window enabling the user to make specific changes to that aspect of the user's setup record. Select the **Biometric Enrollment** button at the bottom of the page to biometrically enroll or update the user's biometric registration.



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Select the **Return** button to return to the main **User** page.

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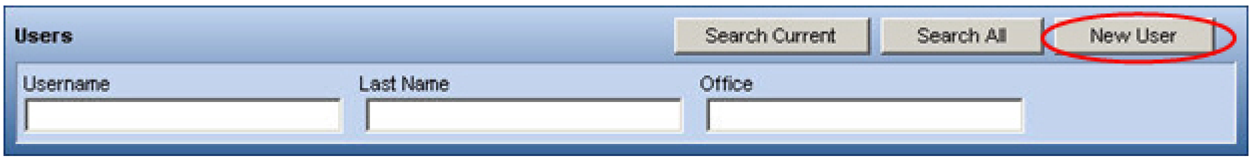
New User

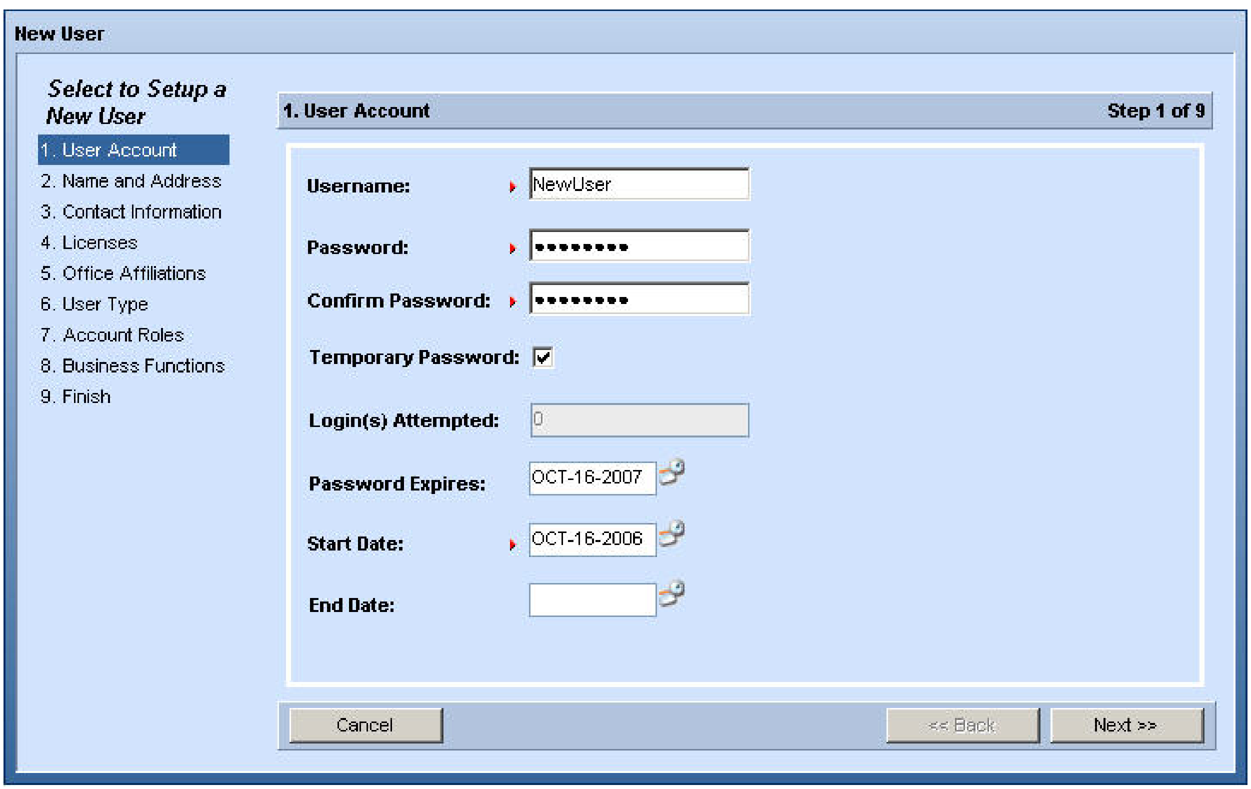
The **DAVE™** application includes a **User Setup** wizard designed to simplify the process of adding new users. Using the setup wizard, new users can be added in just a few minutes with multiple layers of security. System security is actually built as you add your new users.

Accessing the Wizard

From the main **Users** page, shown below, select the **New User** button to launch the setup wizard.



You have now accessed the **New User** creation wizard and should see the **User Account** page shown below. Please note that it is not always necessary to fill out every box on every page. Only those items marked by red arrows ( ) are mandatory entries which must be completed.



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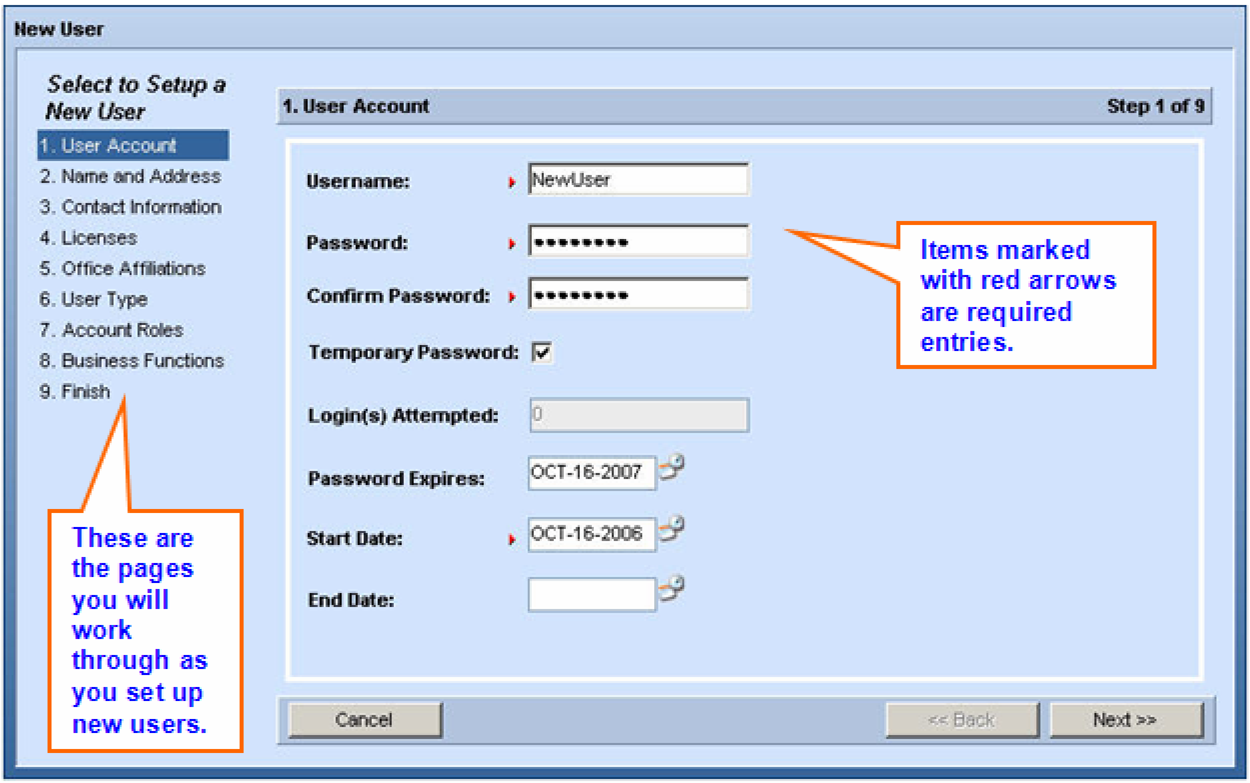
1. User Account

First, enter the new user's **Username**. The **Username** must be between 6 and 10 characters in length and may not contain any spaces. In addition, *user names are case sensitive*, so take care in how they are set up. Note that this entry box is marked by a red arrow ( ) and must be completed for every user.



The next two boxes are for **Password** entry. The password entered must be the same in both text entry boxes. Passwords must be at least 6 characters long and, like user names, *passwords are case sensitive*. Note that both of these entries are marked by red arrows ( ) and must be completed for every user.

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Temporary Password – When a new user is created, a temporary password is assigned. Additionally, if a user forgets or misplaces their password then a temporary password can be assigned. Placing a checkmark in the **Temporary Password** field will flag the account and require that the user change their password the next time they sign in.

Login Attempts keeps track of the number of unsuccessful user login attempts. Once the count reaches 3, the account will be locked. A system administrator can reset this number by returning to this screen and resetting the value to 0. At the same time, the system administrator should also create a new password for the user and select the **Temporary Password** box. As described above, tagging a password as temporary will require the user to create a new password the next time they log into the system.

Note: When a new user is created, the Login Attempts entry box is system filled with a zero. It is neither required nor possible to make an entry here.

In the **Password Expires** entry box, enter the date on which the user's password will expire. All dates must be entered using one of the following formats:

a. **MONDDYYYY** – where "MON" represents the letter abbreviation of the month's name, "DD" represents the two-digit day of the month, and "YYYY" represents a 4 digit entry for the year

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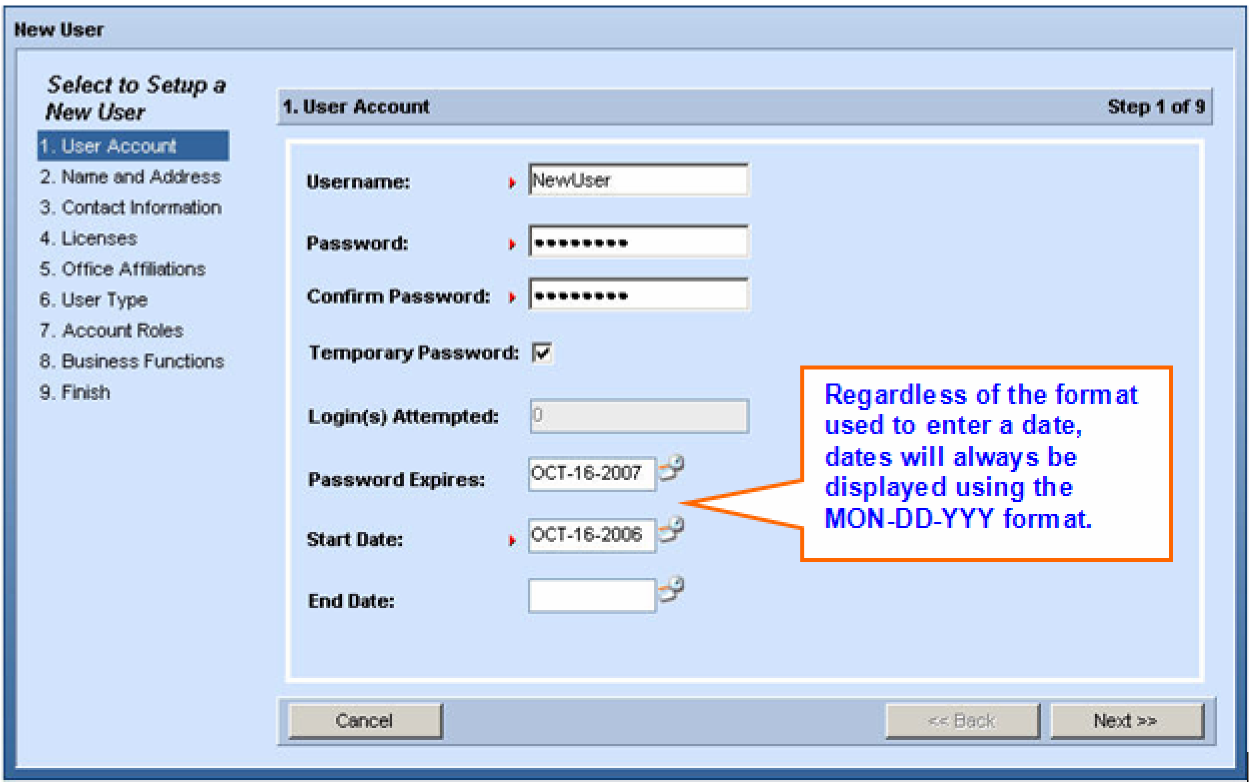
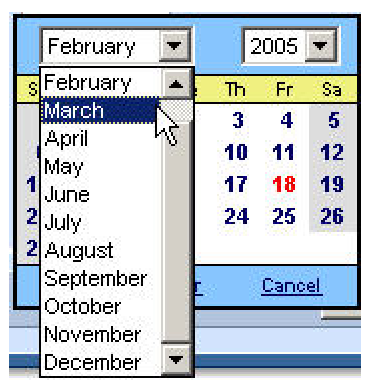
b. **MM/DD/YYYY** - where "MM" represents the 2 digit month number, "DD" represents the two-digit day of the month, and "YYYY" represents a 4 digit entry for the year
c. **MM-DD-YYYY** - where "MM" represents the 2 digit month number, "DD" represents the two-digit day of the month, and "YYYY" represents a 4 digit entry for the year
d. **MMDDYYYY** - where "MM" represents the 2 digit month number, "DD" represents the two-digit day of the month, and "YYYY" represents a 4 digit entry for the year



Another method for entering dates is to use the **Calendar Control**. By clicking on the calendar icon ( ) you will bring up the **Calendar Control** shown below. By default, the current Month, Day, and Year are pre-selected.

Click on the **Month** dropdown list and select the desired month from the list.



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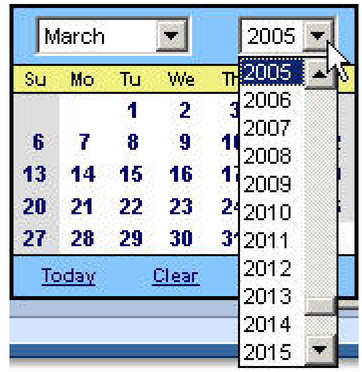
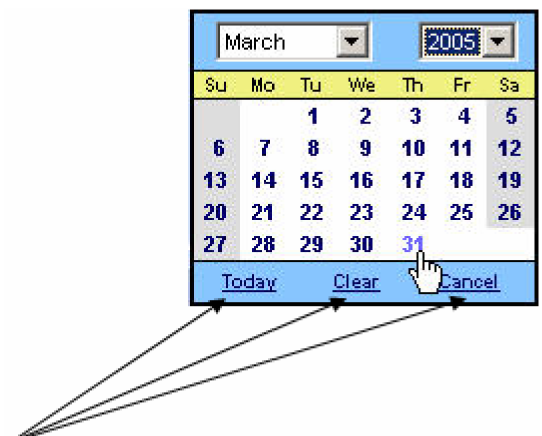
Next, click on the **Year** dropdown list and select the desired year.



Lastly, once the correct month of the correct year is displayed, select the desired day of the month and the correctly formatted date will automatically populate the date field.



Calendar Control Hints: To quickly key in the current day's date, click on the 'Today' link on the bottom of the control. Click 'Clear' to clear out a previously selected date or click 'Cancel' to close the control without saving any changes.

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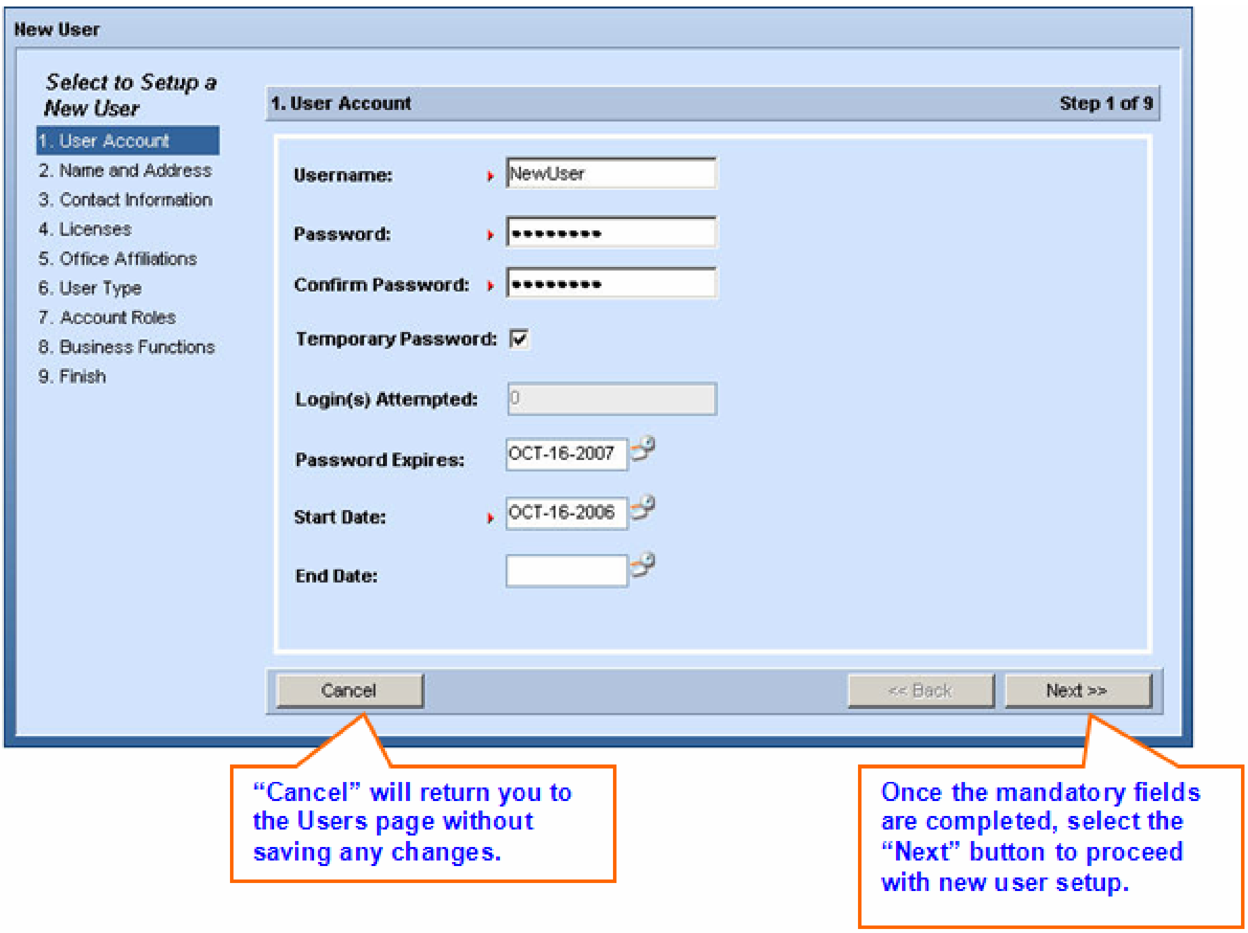
In the **Start Date** and **End Date** fields, enter the date that the password will take effect and the day on which it will expire, respectively. Try using the Calendar control for error-proof entries. Note: **Start Date** must be earlier than **End Date**. If **Start Date** is the same as **End Date** or later than **End Date** then you will receive an error message.

Helpful Hint: Placing the focus in any date entry box and pressing f12 will automatically place the current date in that field.



When all of the mandatory fields have been entered, select the **Next** button to proceed to the **Name and Address** page, or **Cancel** to exit the **User Setup** wizard without saving changes.

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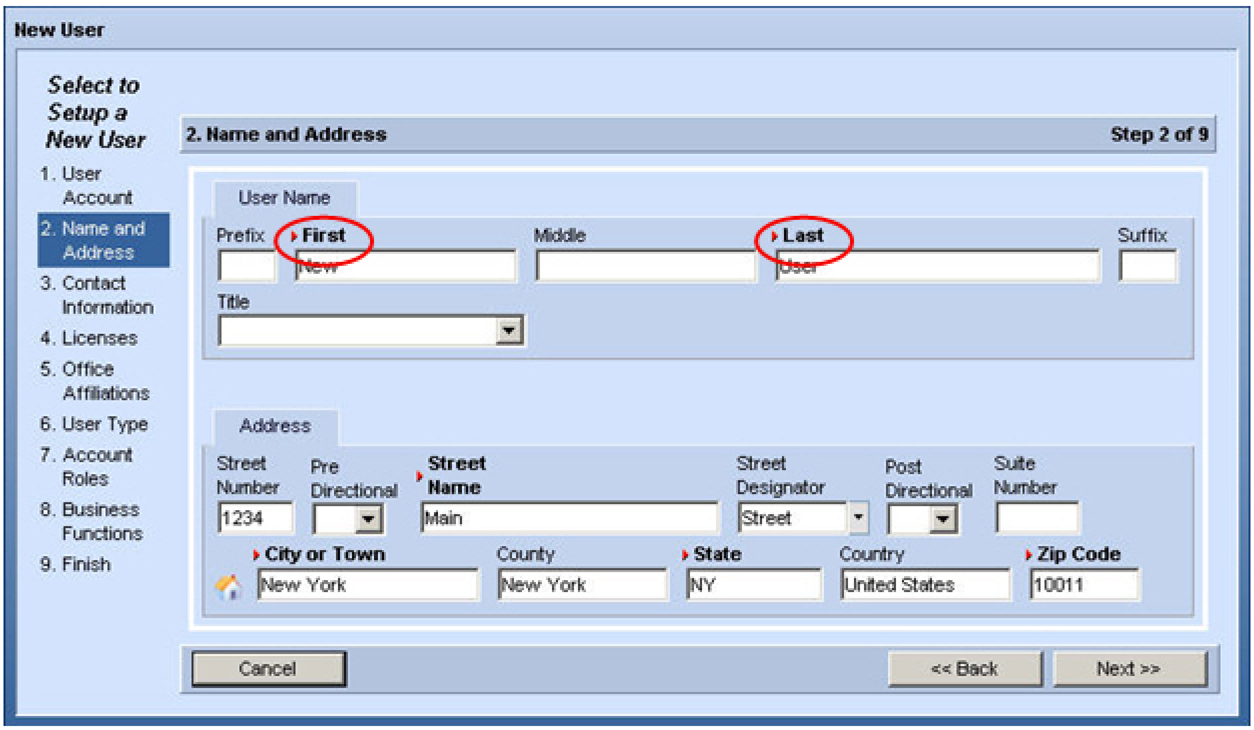
2. Name and Address

On the **Name and Address** page, notice that the **<<Back** button is now enabled. The **<<Back** button allows you to return to the previous page or pages if you need to make changes or corrections. This button is displayed but not active on the **User Account** page.

On the **User Name** tab, make the following entries:

a) **Prefix** – contains entries such as Mr., Mrs., Ms., Sister, Father, etc…
b) **First** – User's First Name
c) **Middle** – User's Middle Name or Middle Initial
d) **Last** – User's Last Name
e) **Suffix** – contains entries such as Jr., III, etc…
f) **Title** – contains entries such as Dr., MD, DO, etc. If the user is a Medical Certifier then a title should always be selected.



Important: Note that First and Last name are marked by red arrows ( ), indicating that these are required fields and must be completed.

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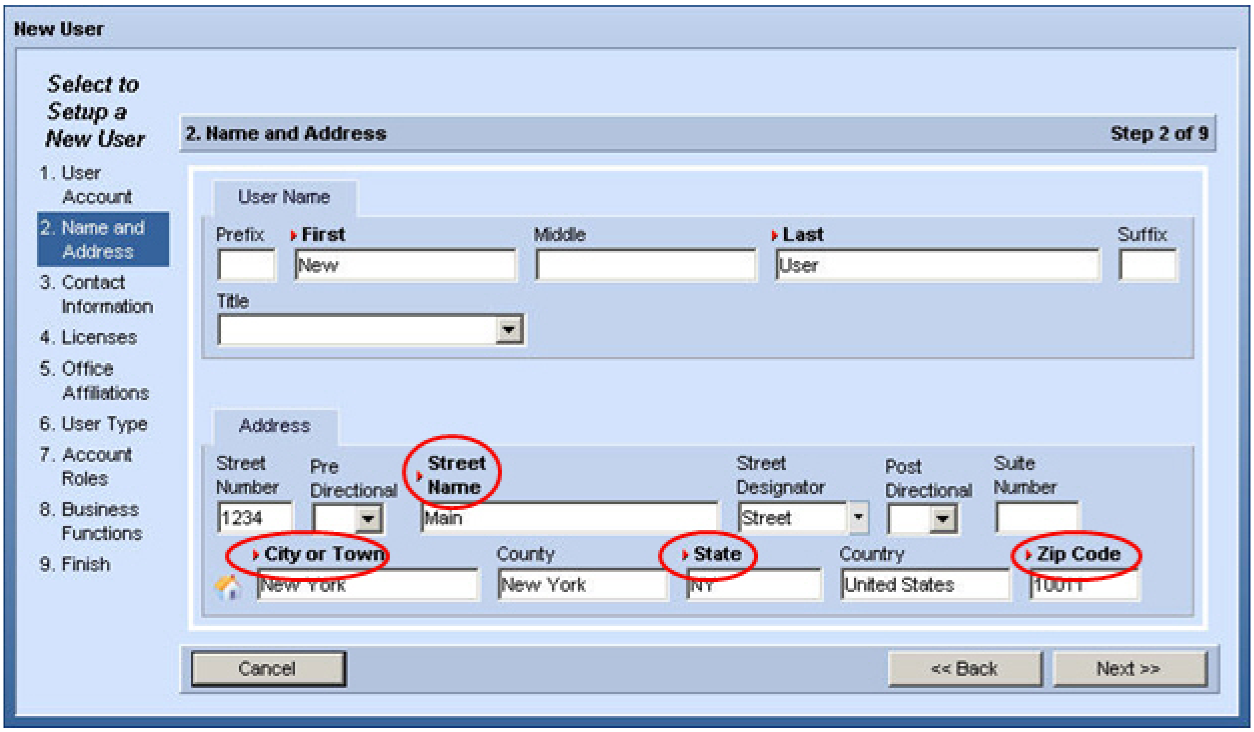
On the **User Address** tab, make the following entries:

a) **Street Number** – house street number
b) **Pre Directional** – street pre-directional indicator (if applicable)
c) **Street Name** – name of street where user lives
d) **Post Directional** – street post-directional indicator (if applicable)
e) **Street Designator** – Street, Blvd, Drive, etc…
f) **Suite Number** – Apartment number or suite number (if applicable)
g) **City or Town** – City or Town in which user lives
h) **County** – County in which user lives
i) **State** – User's state of residence
j) **Country** – User's country of residence
k) **Zip Code** – User's Zip Code using Zip or Zip+4



Important: Note that Street Name, City or Town, State, and Zip Code are marked by red arrows (▸), indicating that these are required fields and must be completed.

When you are finished inputting data, select the **Next>>** button to proceed with User setup, the **<<Back** button to change/update data on a previous page, or **Cancel** to exit the User Setup Wizard without saving changes

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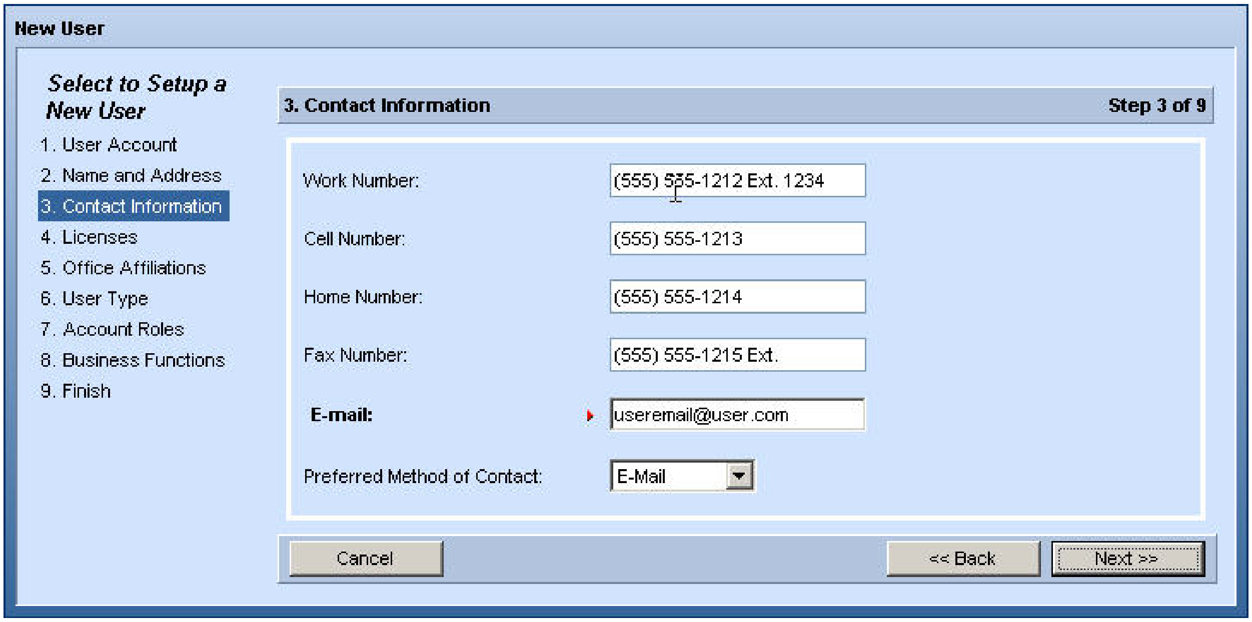
3. Contact Information

The **Contact Information** page is used to gather User related phone numbers and an e-mail address. Please note that the only field marked with a red arrow ( ) is **E-Mail**. Therefore, none of the other entries are required. However, filling in some or all of this data will help to create a more robust and useful EDRS system.



Enter the user's work phone number (if applicable) in the **Work Number** box. Notice that tabbing into any of the phone number entry boxes causes a phone number entry template to appear. Extension can be entered if one exists, but is not required. If no extension exists, then leave it blank.

Enter the user's cell phone number (if applicable) in the **Cell Number** box. Notice that tabbing into any of the phone number entry boxes causes a phone number entry template to appear.

Enter the user's home phone number (if applicable and desired) in the **Home Number** box. Notice that tabbing into any of the phone number entry boxes causes a phone number entry template to appear.

Enter the user's fax number (if applicable) in the **Fax Number** box. Notice that tabbing into any of the phone number entry boxes causes a phone number entry template to appear. Extension can be entered if one exists, but is not required. If no extension exists then leave it blank.

Enter a valid e-mail address in the **E-mail** box. Note that the **E-Mail** field is marked with a red arrow ( ) and is, therefore, a required field. Valid e-mail addresses always

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consist of a 'username,' followed by an '@' symbol, and end with the domain name of a mail server. Never use spaces in an e-mail address.

From the **Preferred Method of Contact** dropdown list, select the 'user's' contact preference.

Once all entries are completed, select the **Next>>** button to proceed with User setup, the **<<Back** button to change/update data on a previous page, or **Cancel** to exit the User Setup Wizard without saving changes.

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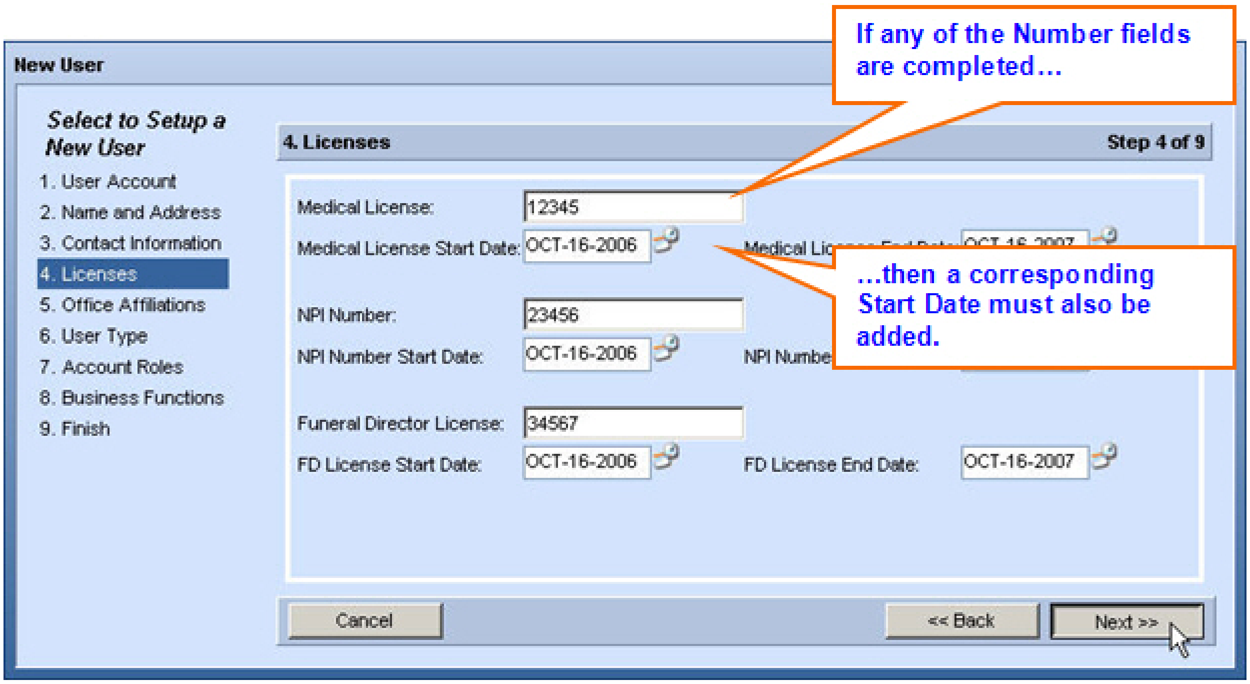
4. Licenses

The **Licenses** page is used to gather user-related, professional licensing information. Not all users possess or require licenses to perform their duties. Therefore, none of these fields are marked with a red arrow ( ) and all of them can be disregarded. However, it is strongly recommended that this information be included for all users who are licensed.



Enter the user's medical license number (if applicable) in the **Medical License Number** box.

If a medical license number is entered then a **Medical License Start Date** must also be entered. If not, this error message will be generated:

If a **Medical License Start Date** has been entered, then a **Medical License End Date** can also be entered. Though End Dates are not required entries, they can help you keep track of those Data Providers whose licensing credentials have expired
Enter the user's NPI number (if applicable) in the **NPI Number** box.

If an NPI number is entered, then an **NPI Number Start Date** must also be entered. If not, this error message will be generated:

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If an **NPI Number Start Date** has been entered, then an **NPI Number End Date** can also be entered. Though End Dates are not required entries, they can help you keep track of those Data Providers who licensing credentials have expired.

Enter the user's funeral director's license number (if applicable) in the **Funeral Director's License Number** box.

If a funeral director's license number is entered then a **Funeral Director's License Number Start Date** must also be entered. If not, this error message will be generated:

If a **Funeral Director's License Start Date** has been entered, then a **Funeral Director's License End Date** can also be entered. Though End Dates are not required entries, they can help you keep track of those Data Providers who licensing credentials have expired

Once all necessary entries are completed, or if you simply do not wish to enter any of the data, click on the **Next>>** button to proceed with User setup or the **<<Back** button to change/update data on a previous page. Select **Cancel** to exit the **User Setup** wizard without saving changes.

Important Note: If a License End Date has passed and that User/Data Provider tries to enter or update a record, the update will fail until the License End Date is extended.

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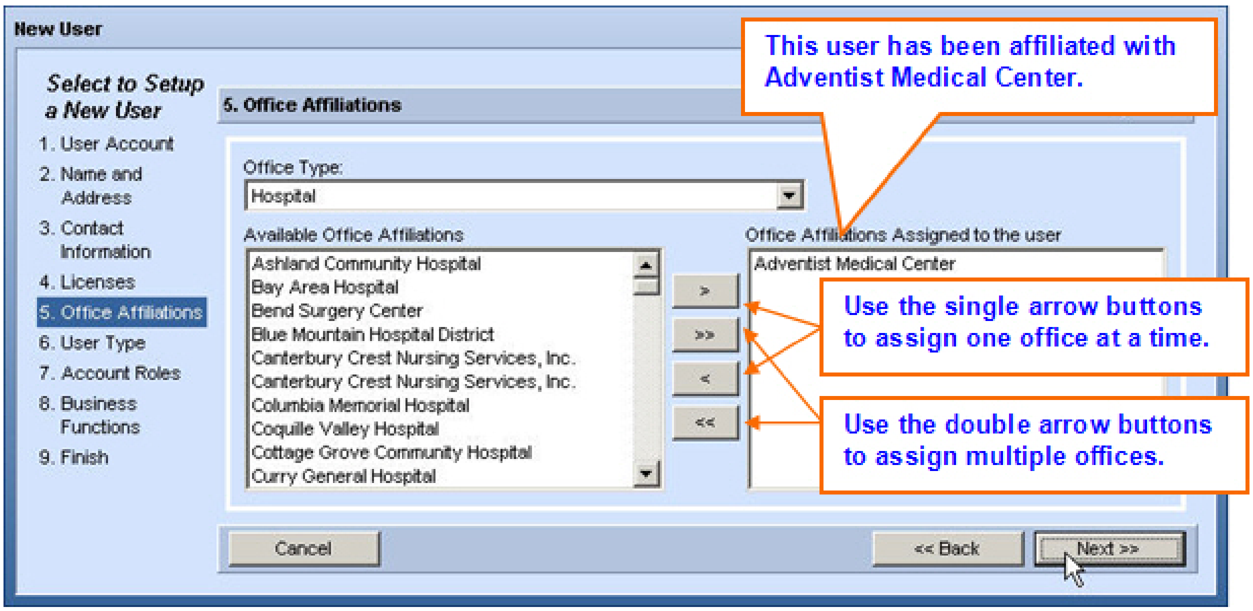
5. Office Affiliations

The **Office Affiliations** page is used to associate the User to a particular facility type. For example, if the user were a physician, then they would be associated with office types such as Birthing Centers, Hospitals, Clinics, etc… If the user were a state employee working at the registration office then they would be associated with the office type of Central Registration Office.

All users must have at least one office affiliation, though they may have more.



Select an appropriate office type from the **Office Type** dropdown list.

Select the appropriate available office(s) from the **Available Office Affiliations** dropdown list. To select a single office, single-click on the desired office and click the '**>**' button to move the office from the **Available Office Affiliations** list on the left, to the **Office Affiliations Assigned to the User** list on the right.

Multiple selections can be made by holding down the '**ctrl**' key on your keyboard while single-clicking multiple selections. Once all desired selections have been highlighted, click the '**>**' button to move the office(s) from the **Available Office Affiliations** list on the left to the **Office Affiliations Assigned to the User** list on the right.

To move all the available offices from the **Available Office Affiliations** list on the left to the **Office Affiliations Assigned to the User** list on the right, click on the '**>>**' button. All available offices will be associated with the user.

If you made a mistake you can move offices from the **Office Affiliations Assigned to the User** list on the right, back to the **Available Office Affiliations** list on the left by

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using the '**<**' button. Clicking the '**<<**' button will move all office selections back to the **Available Office Affiliations** list.

Select the **Next>>** button to proceed with User setup, the **<<Back** button to change/update data on a previous page, or **Cancel** to exit the **User Setup** wizard without saving changes.

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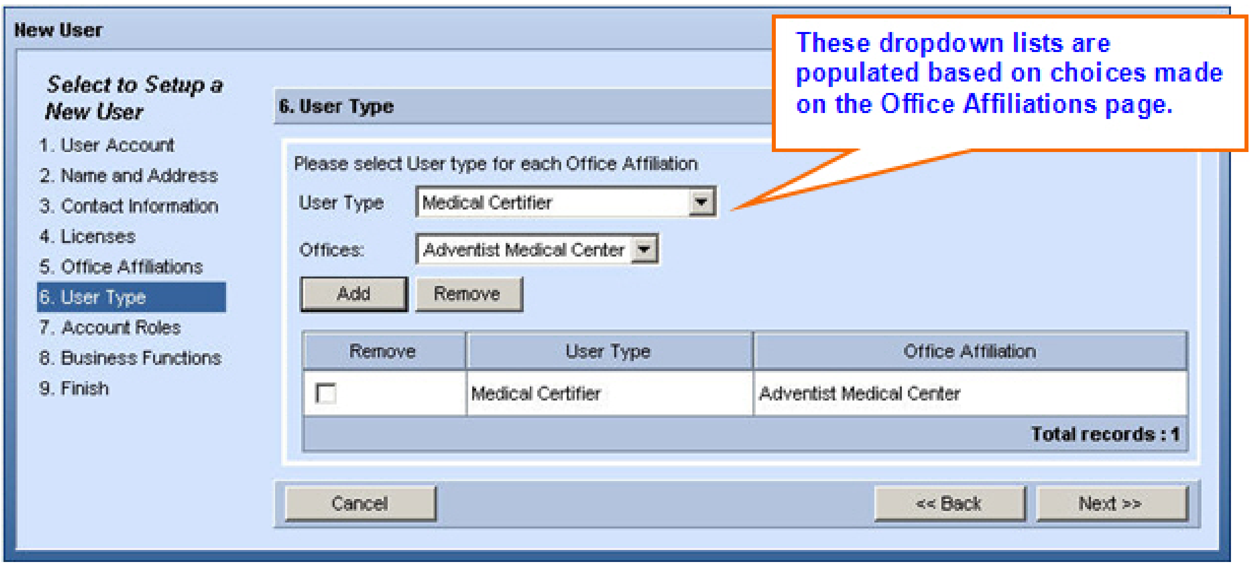
6. User Type

Similar to **Office Affiliations**, the **User Type** page is used to associate the user to specific user type(s). For example, if the user were a Physician, then they would be given the **User Type** of Physician.

Note, the user must be assigned a **User Type** for every office with which they are affiliated. For example, if the user is affiliated with more than one hospital, then their user type at each hospital must be defined. Their user type will probably be the same at each hospital, but each must be entered separately.



Select the appropriate **User Type** from the **User Type** dropdown list.

Note: the **Offices** dropdown list is populated based on the offices that the user was affiliated with on the **Office Affiliations** page. Select the first office from the list and click the **Add** button. A spreadsheet control will display the selected **User Type** and **Offices**.

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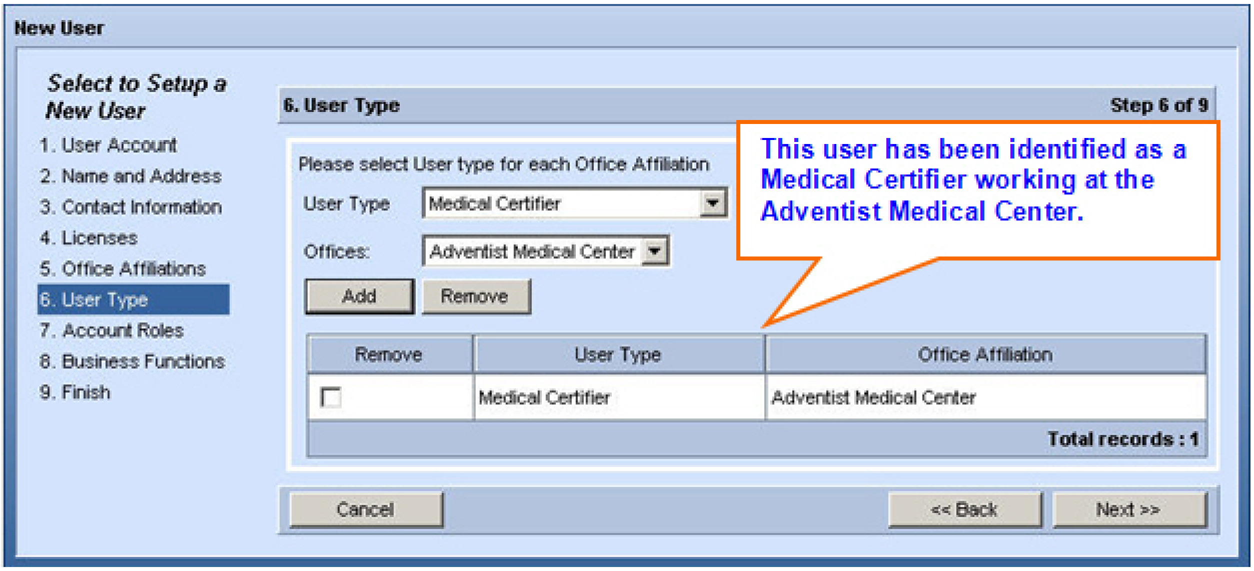
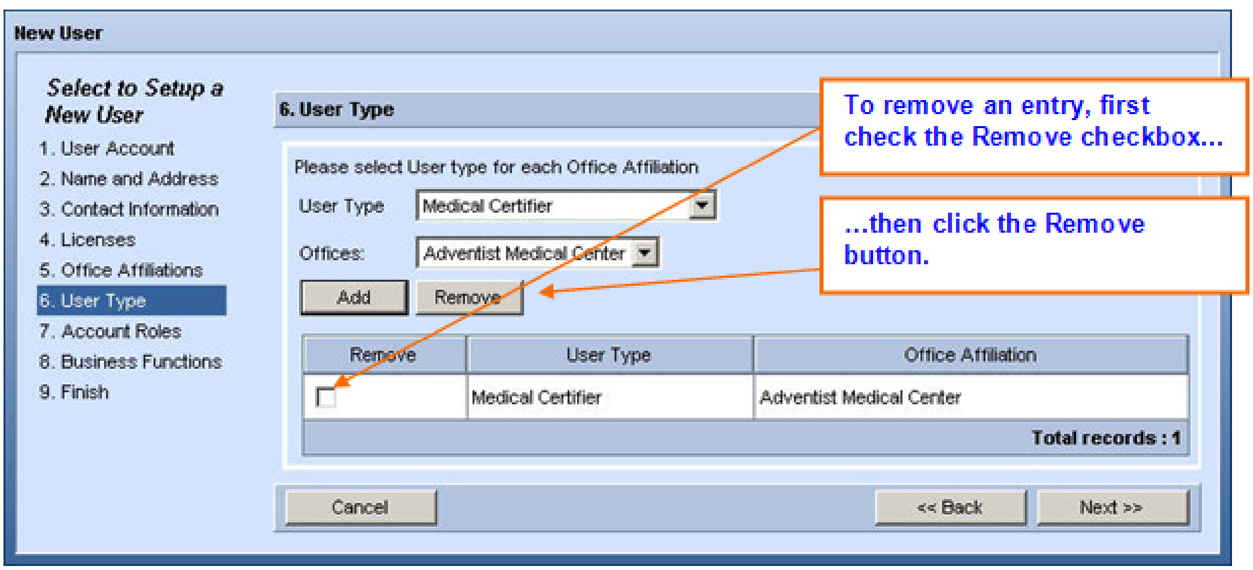


Continue selecting offices from the **Offices** dropdown list and adding them to the spreadsheet by clicking the **Add** button. Alternatively, you can automatically populate the spreadsheet control with all affiliated offices by selecting **All** from the **Offices** dropdown list and clicking the **Add** button.

To remove any erroneous entries place a checkmark in the **Remove** checkbox and click on the **Remove** button.



Once a **User Type** has been assigned to all affiliated offices, select the **Next>>** button to proceed with User setup, the **<<Back** button to change/update data on a previous page, or **Cancel** to exit the **User Setup** wizard without saving changes.

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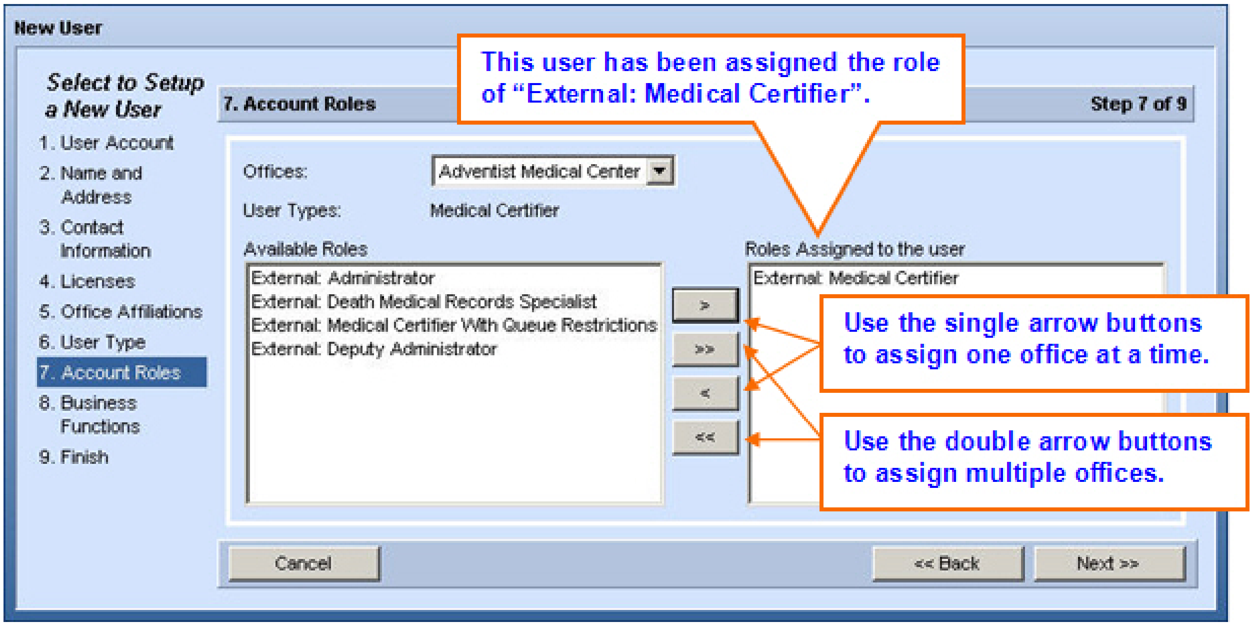
7. Account Roles

Now that we have affiliated our users with general office types and specific offices, we must define the roles that they will fulfill within those offices.



Select an office from the **Offices** dropdown list. Again, this dropdown list is populated based on the office affiliations assigned on **Page 5: Office Affiliations**. At least one user role must be assigned for each affiliated office.

User Types is automatically filled in and displayed based on the user type assigned on the previous page.

Select the appropriate available role(s) from the **Available Roles** list. To select a single role, single-click on the desired role and click the '**>**' button to move the role from the **Available Roles** list on the left to the **Roles Assigned to the User** list on the right.

Multiple selections can be made by holding down the 'ctrl' key on your keyboard while single-clicking multiple selections. Once all selections have been highlighted click the '**>**' button to move the role(s) from the available roles list on the left to the **Roles Assigned to the User** list on the right.

To move all the available offices from the available roles list on the left to the **Roles Assigned to the User** list on the right, click on the '**>>**' button. All available roles will be associated with the user.

If you made a mistake you can move offices from the **Roles Assigned to the User** list on the right back to the **Available Roles** list on the left by using the '**<**' button. Clicking the '**<<**' button will move all role selections back to the **Available Roles** list.

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After assigning at least one user role to each affiliated office, select the **Next** button to proceed with User setup, the **<<Back** button to change/update data on a previous page, or **Cancel** to exit the **User Setup** wizard without saving changes.

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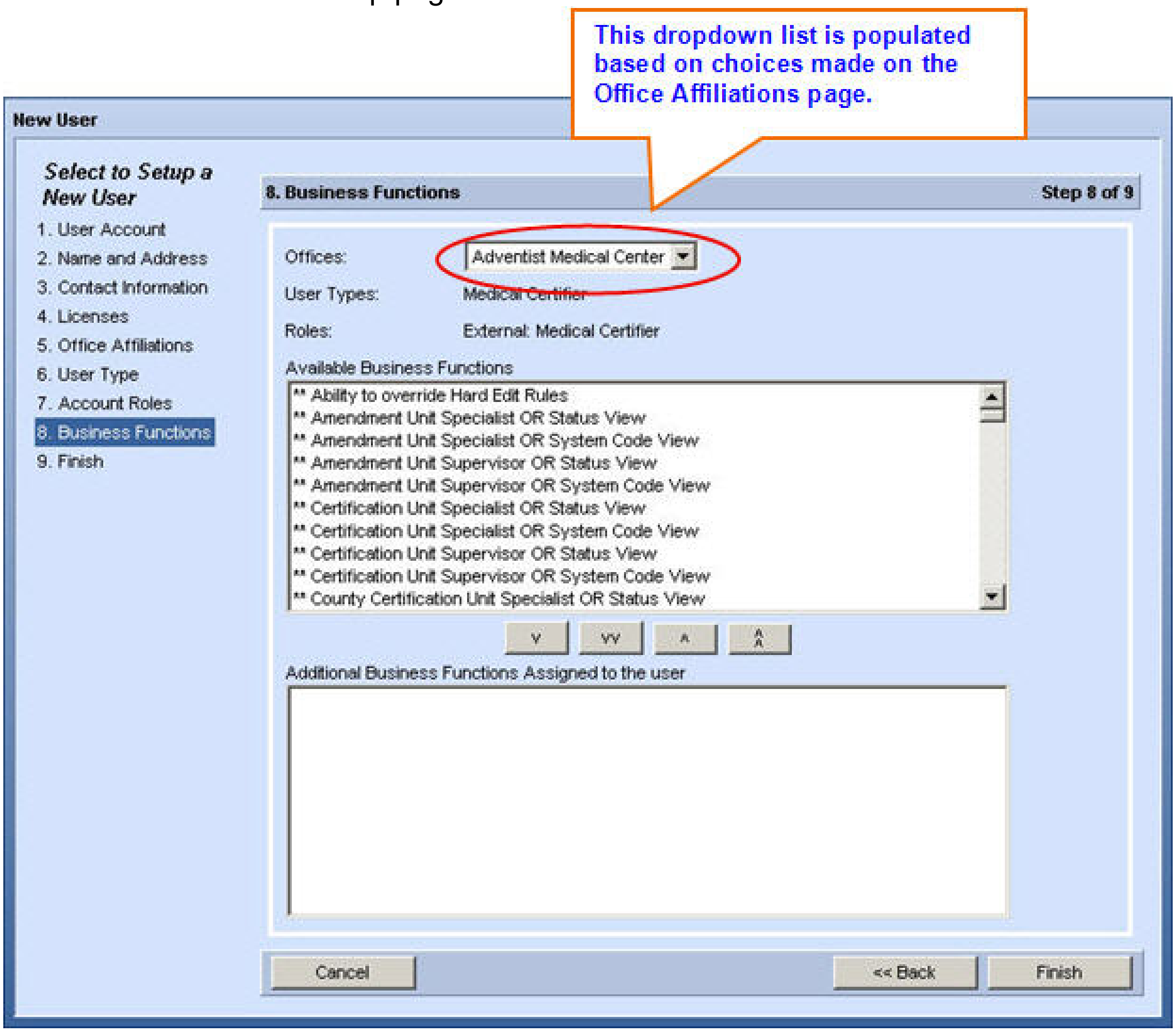
8. Business Functions

On the previous page, a **Role** was assigned to the User. Each role has a pre-defined set of **Business Functions** associated with it. These **Business Functions** define not only how the user will use the **DAVE™** application, they also define and establish the user's security within the system.

However, there may be situations in which a user needs access to functions outside of those normally associated with their pre-defined role. For example, a user with the pre-defined role of Registration Clerk may also be responsible for geo-coding. This is where the **Business Functions** setup page comes into play.

Locate the **Offices:** dropdown list. This list is populated based on the choices made on the **Office Affiliations** setup page.



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The **Available Business Functions** control lists all of the available functions that can be assigned to a user. Select a single function by clicking on it. The function will be highlighted in blue. To select multiple functions, click on one function, press and hold down the 'ctrl' button on your keyboard, and click on additional functions. All selected functions will be highlighted in blue. Once you have made all of the appropriate selections, click on the down-arrow ('**v**') button to move them to the **Additional Business Functions Assigned to the user** control.

Note: This is an optional setup feature. If no additional Business Functions are needed then simply click the 'Finish' button to complete the user setup.

To remove Business Functions from the Additional Business Functions Assigned to the user control, highlight the function by clicking on it and press the up-arrow ('**^**') button. The function will move back to the **Available Business Functions** list.

Note: It is possible, but not advisable, to assign all Business Functions to a user. Simply click the double-down arrow button ('vv') to assign all functions to a user. Use the double-up arrow ('^^') to undo this and move all available functions back to the Available Business Functions list.

Remember, adding additional **Business Functions** effects system security. Be sure that the user has a legitimate need for the functions before adding it.

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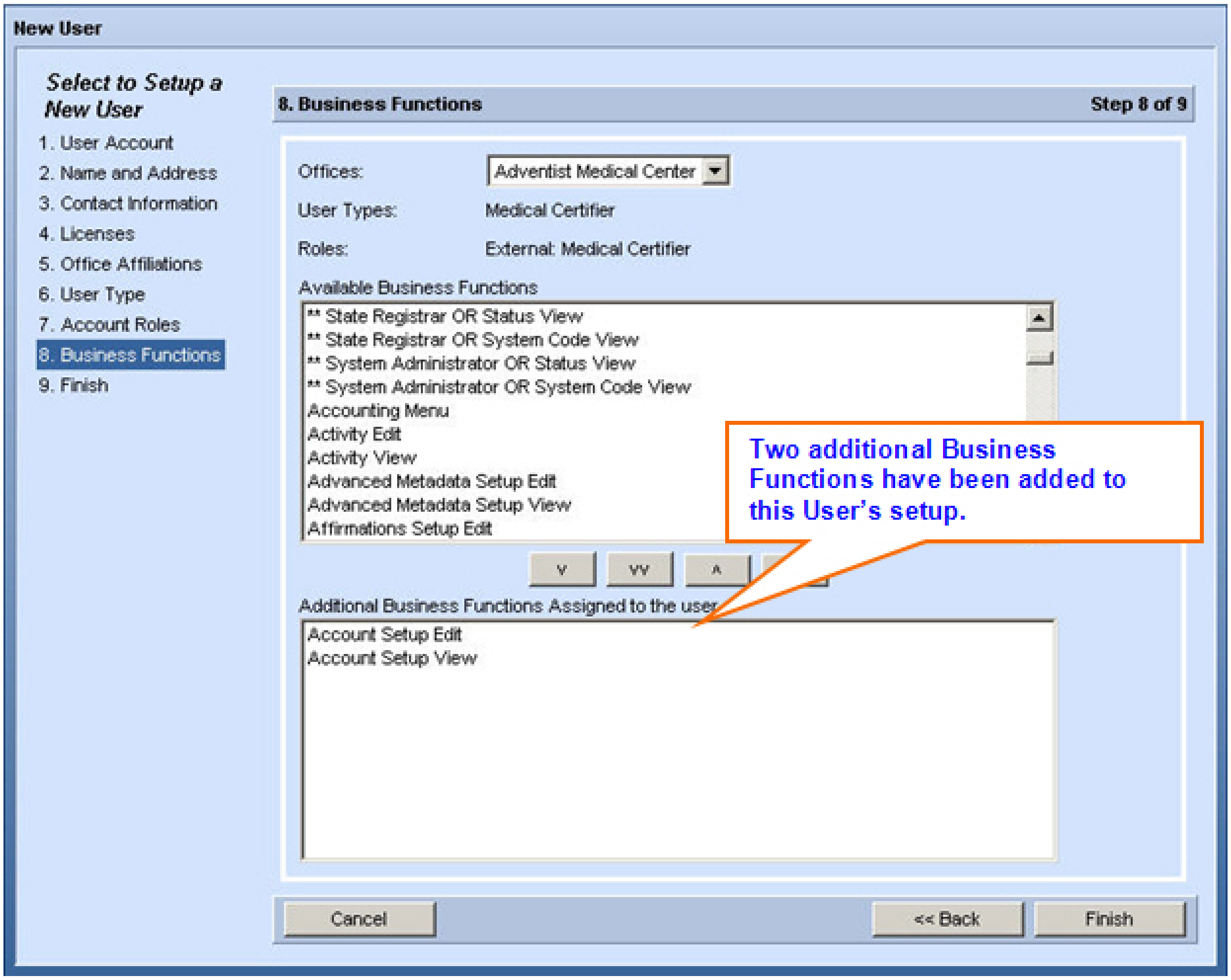
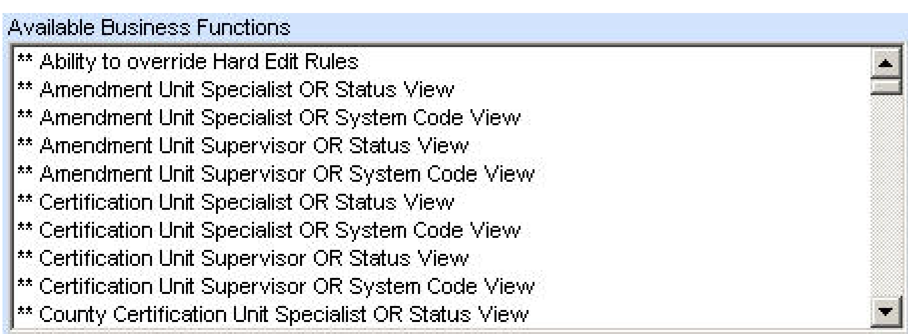


Some business functions are preceded by double-asterisks (**). These functions are referred to as **Allowable Options** and are covered elsewhere in this manual.



Once you have assigned all of the desired business functions, select the **Finish** button to save your User setup data and return to the **Users** page, the **<<Back** button to change/update data on a previous page, or **Cancel** to exit the **User Setup** wizard without saving changes.

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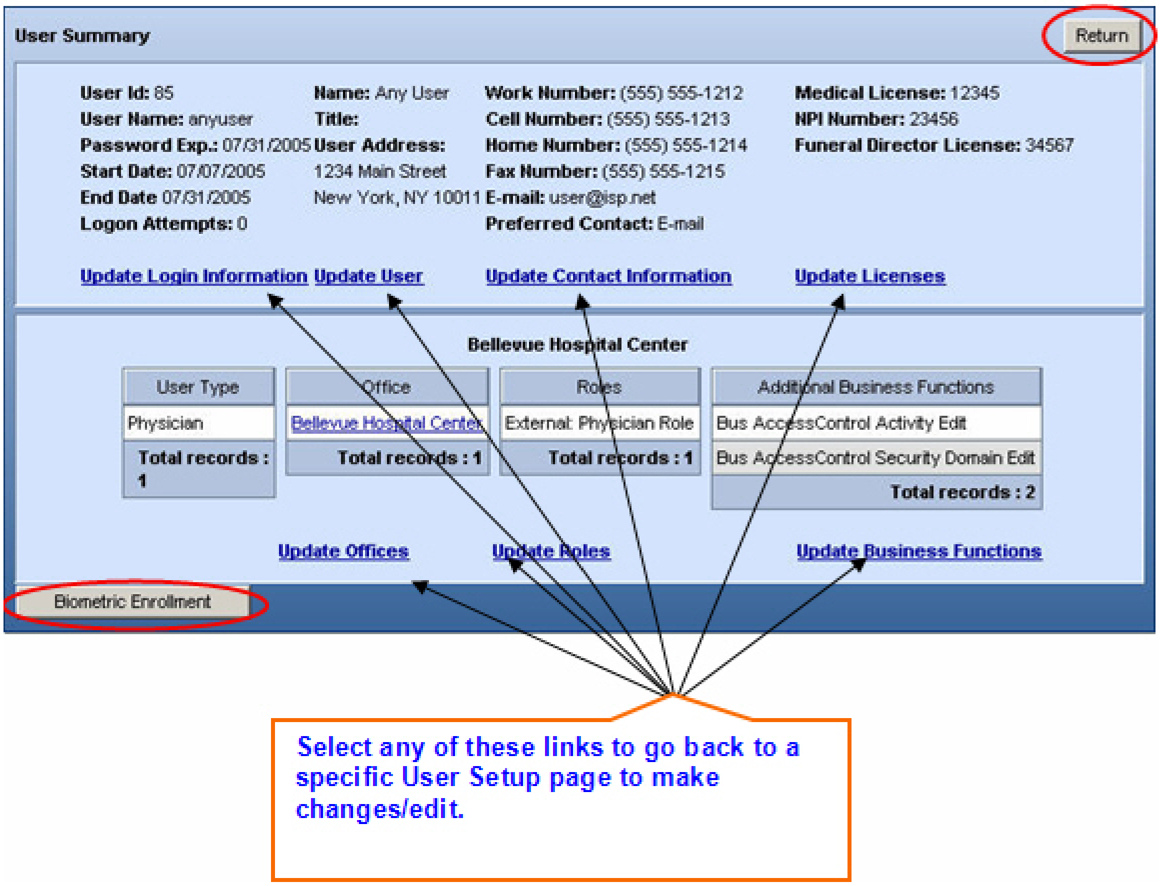
When the setup is complete, you will be taken to the **User Summary** page, shown below. From here, any of the user setup pages can be edited by clicking on the relevant link. This is also the page you will see when you choose to update/edit the information on an existing user.



Select the **Biometric Enrollment** button to launch the biometric application described in the next section. Click the **Return** button to go back to the **Users** page.

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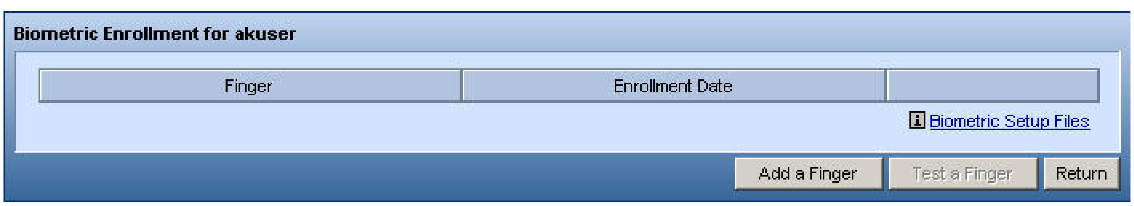
Biometric Enrollment

The **DAVE™** application uses fingerprint verification for **Biometric Authentication**.

A biometric is best defined as measurable human physiological and/or behavioral characteristics used to verify identity. In practice, biometric authentication systems typically combine a username and PIN with a fingerprint or other biometric identification mechanism. Combining these two authentication factors – "something you know" and "something you are," provides a higher level of security. **DAVE™** uses fingerprint verification since it is highly reliable and fingerprint devices tend to be small, have a relatively low cost, and are easily integrated.

Before a user may electronically sign a certificate, the user must complete a biometric enrollment process. This process involves the identity verification of the user and then the capture of one or more fingerprints. These samples are stored in the **DAVE™** database in a "biometric template" and are used for future comparison during authentication. Once enrollment and storage are complete, the **DAVE™** application authenticates a user by matching the template against the current fingerprint scan. Comparison of the current scan and the template results in a simple binary yes/no match.

Click the **Biometric Enrollment** button in the lower, left-hand corner of the **User Summary** page (shown above) to register one or more of this user's fingerprints. **Biometric Enrollment** is only necessary if the user will be Signing, Certifying or Pronouncing a vital record.



Before a user can be enrolled, the system administrator must have the proper software installed on their PC and the PC must be equipped with a biometric enrollment fingerprint reader. The **DAVE™** application currently supports fingerprint devices manufactured by Targus and APC, only. Contact the customer support desk to verify that the fingerprint devices in your office are compatible with **DAVE™**.

Once you have verified that your fingerprint devices are compatible, you will need to install the proper software on your PC. This software only needs to be installed once and should only be installed on those PCs that will be equipped with fingerprint scanning devices.

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NOTE: DO NOT install the software that comes with the fingerprint device. DAVE™ specific software must be installed instead. Software must be installed by qualified personnel.

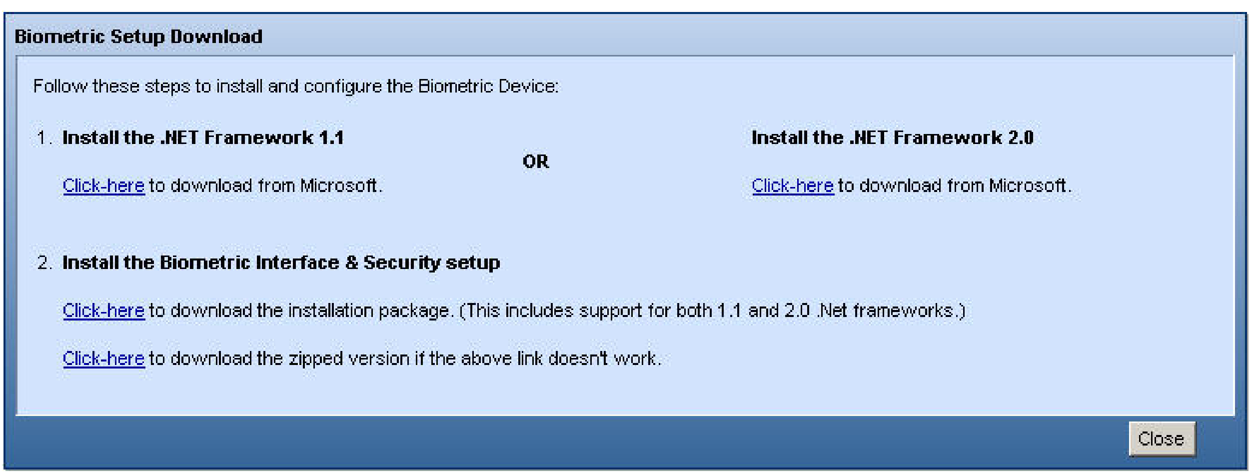
To install the software, locate and click the **Biometric Setup Files** link as shown below:

The **Biometric Setup Download** page will pop-up on-screen. There are two steps:

1. **Install the .NET Framework 1.1** OR **Install the .NET Framework 2.0** software.
2. **Install the Biometric Interface & Security setup** software

First, click the **Click-here** link to download and install the **.NET Framework 1.1** or **.NET Framework 2.0** files.

NOTE: You must first check with your System / Network Administrator before choosing which Framework to install. The .NET Framework selected can impact the performance of other programs you have installed on your local PC or Laptop.



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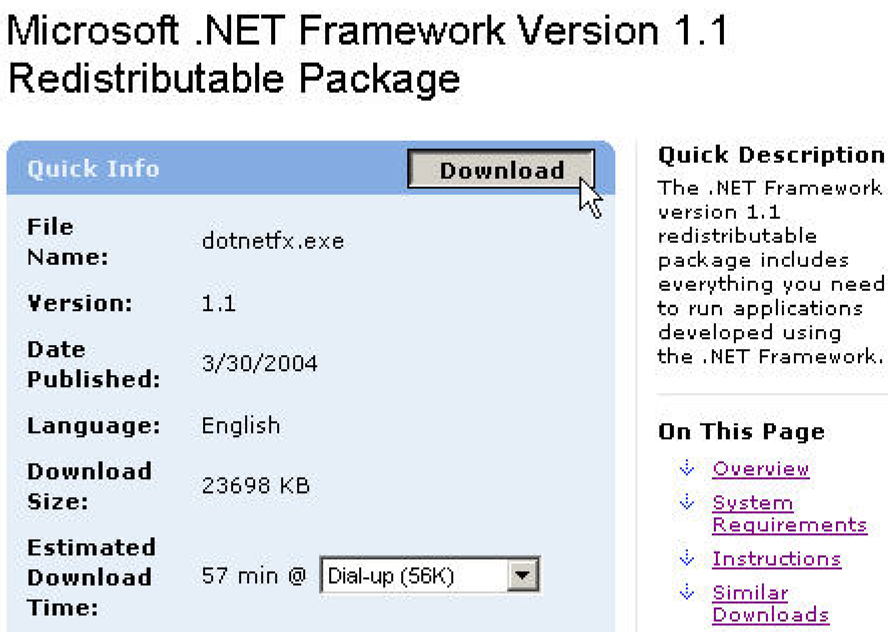
A new web-browser will be launched and will automatically connect with the MS download site. When prompted, click the **Download** button to download and install the selected **Microsoft .NET Framework Redistributable Package**.



When the **.NET Framework** package has been installed, return to the **Biometric Setup Download** page and select the **Click-here** link to **Install the Biometric Interface & Security setup** software. Two links are provided. The first link is attached to an executable file. If your network security will allow you to download and run applications directly, then click the first link.

A **File Download** dialog will pop onscreen. Select **Run** to run the executable and install the **Biometric Setup** files.

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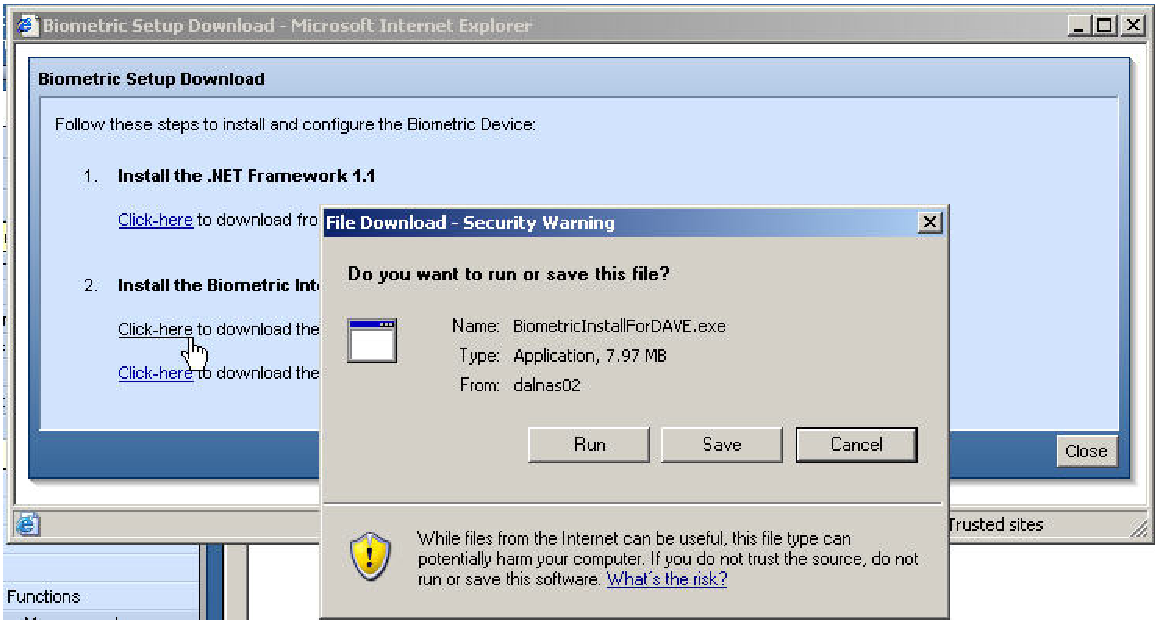
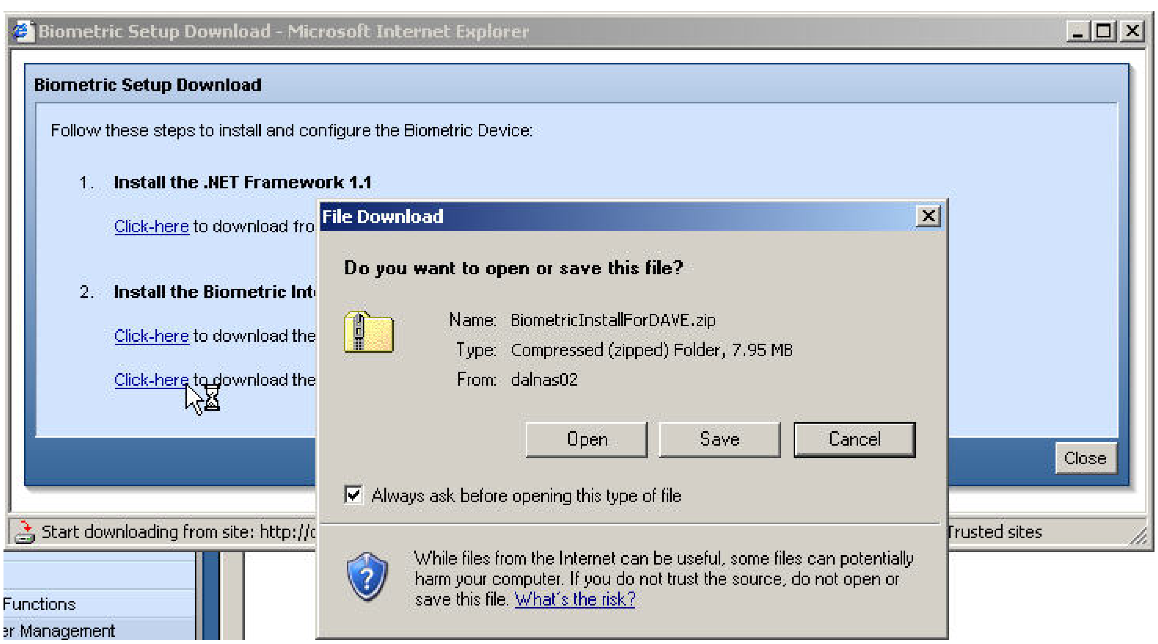


If your network security will not allow you to download and run applications directly from the server, then click the 2nd link, **Click-here to download the zipped version if the above link doesn't work**, to download a compressed file containing the setup files. These files will have to be unpacked and installed manually. If you cannot complete this procedure yourself, contact your network administrator for assistance.



Once the software and the fingerprint device have been installed, return to the **Biometric Enrollment** page and click the **Add a Finger** button.

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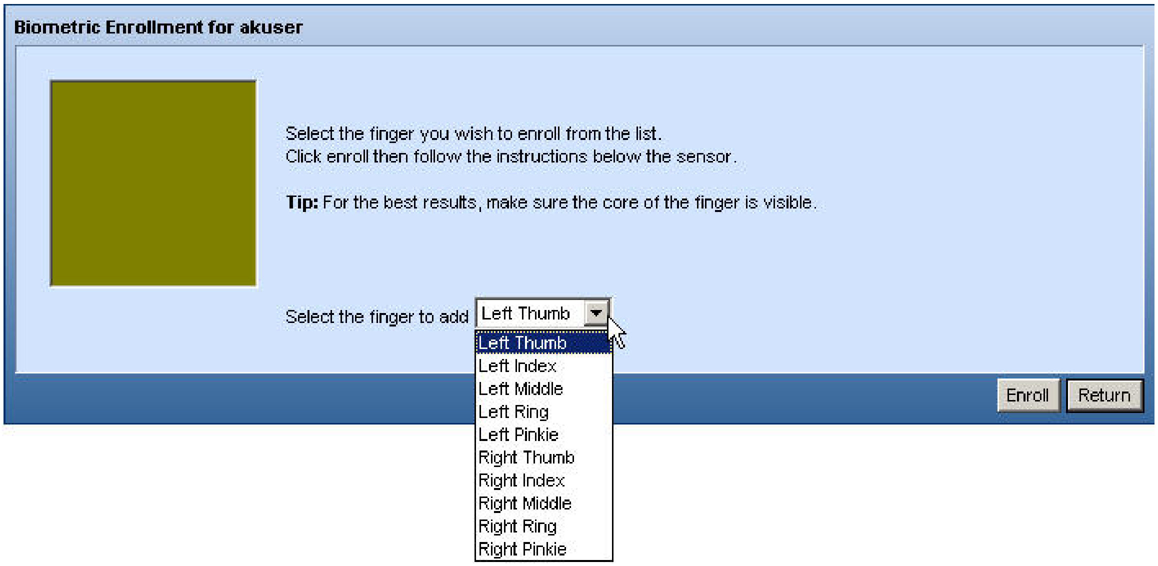
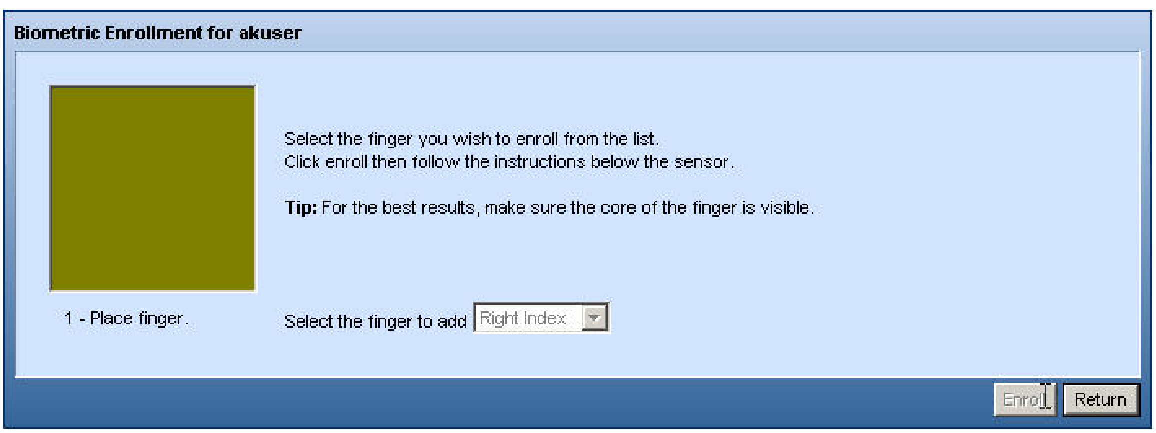
The **Biometric Enrollment** page will refresh displaying a large, dark green square and a dropdown list. From the **Select the finger to add** dropdown list, select the finger to be enrolled.



With the finger selected from the list, click the **Enroll** button. The following label will appear underneath the green square: **1 – Place Finger**.



Place the finger to be enrolled on the metallic, gold colored pad on the fingerprint device. The **DAVE™** application will 'read' the fingerprint and display it onscreen in place of the green square. After the device has read the fingerprint once, the label will change to read: **2 – Lift and replace finger**.

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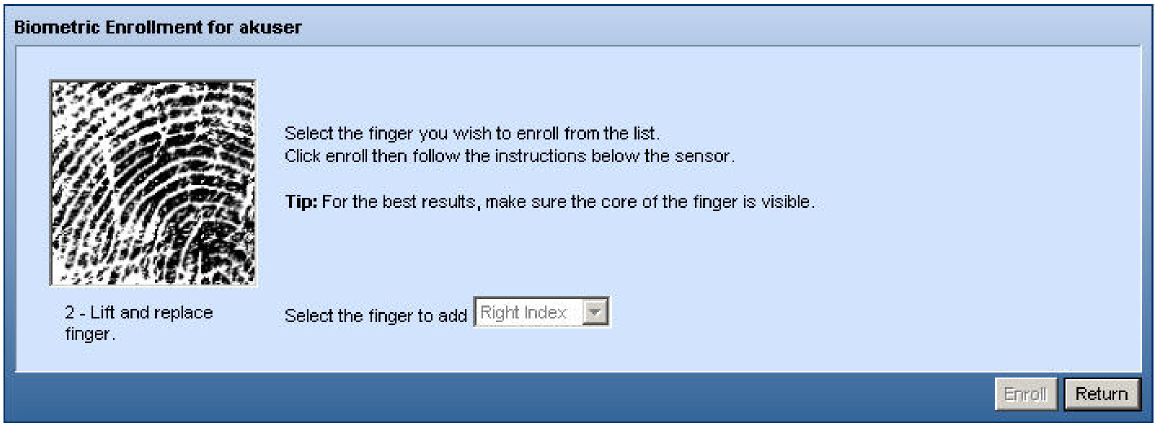
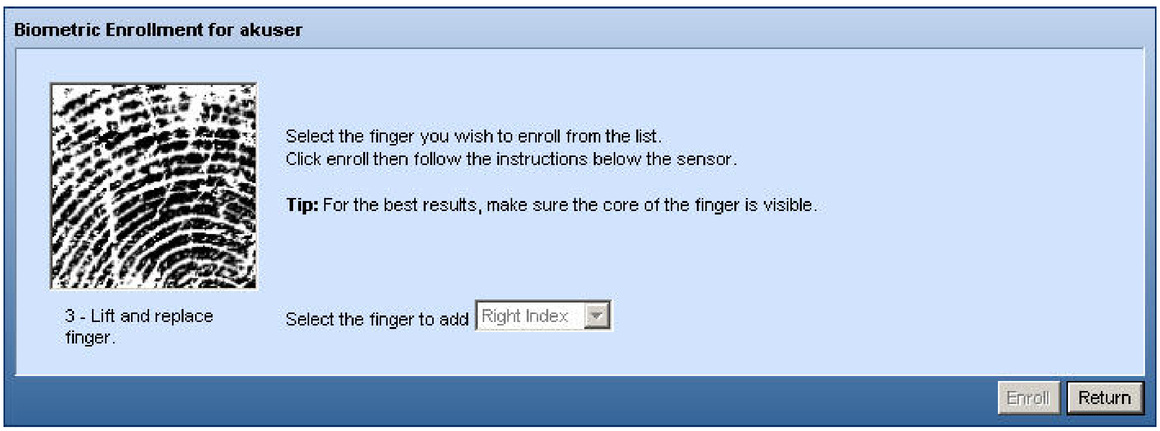
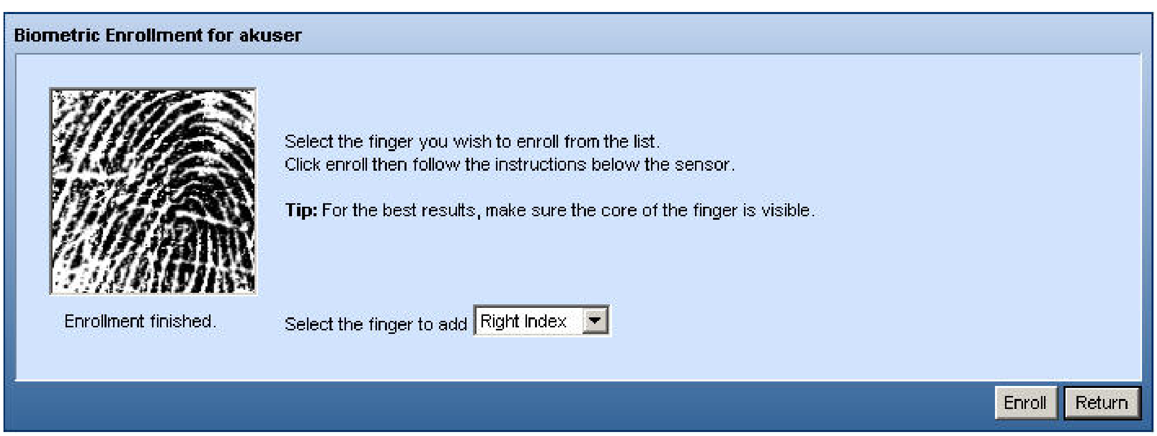


Carefully lift and replace the user's finger so that the same portion of the finger touches the pad again. It will be necessary to repeat this action up to 8 times in order to obtain a usable impression of the user's finger.



When the system has been able to successfully read and store the fingerprint a new label will appear: **Enrollment Finished**.



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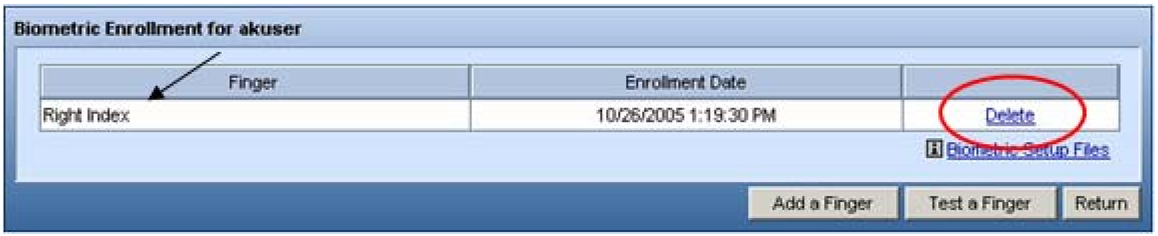
The page will automatically refresh and display a table of successfully registered fingerprints on the **Biometric Enrollment** page.

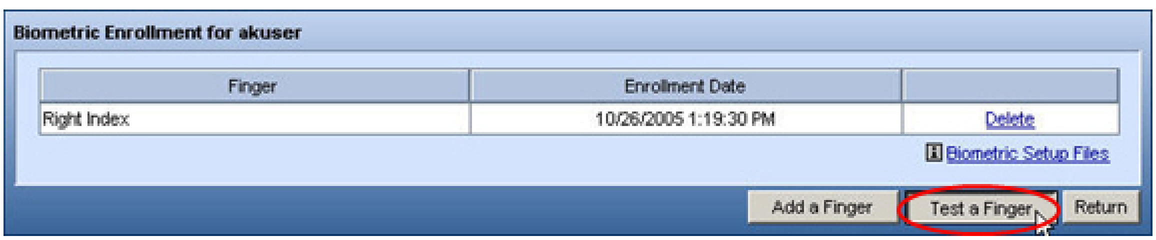


As shown above, this user has successfully enrolled a **Right Index** finger. This print can be deleted by clicking the **Delete** button.

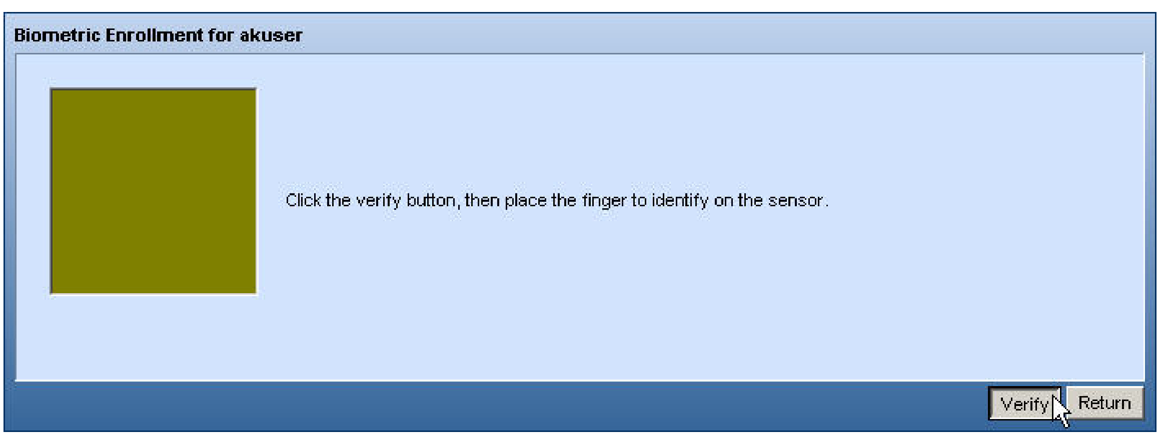
Test a Finger

The **DAVE™** application also allows the user to test a finger to determine whether or not it has been successfully enrolled.

From the **Biometric Enrollment** page, select the **Test a Finger** button.



The now familiar green square will appear onscreen with instructions to click the **Verify** button…



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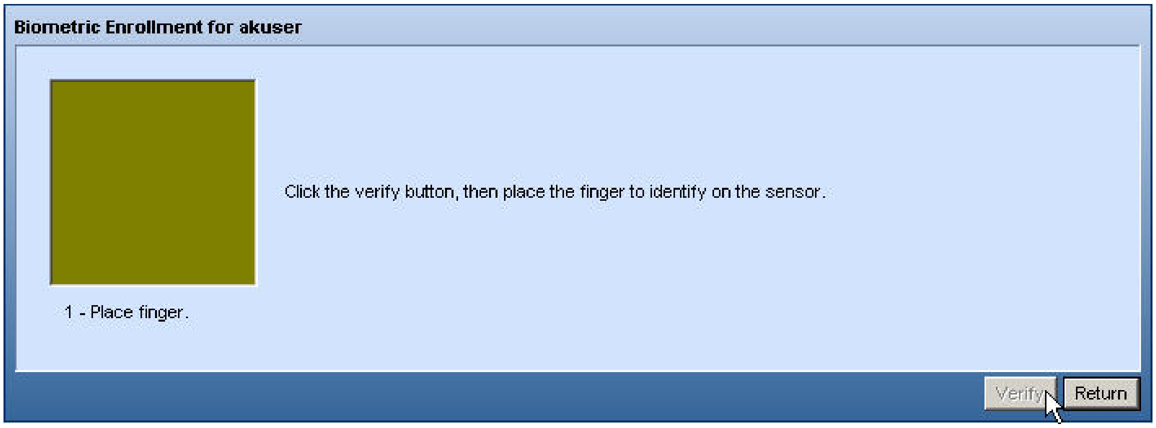
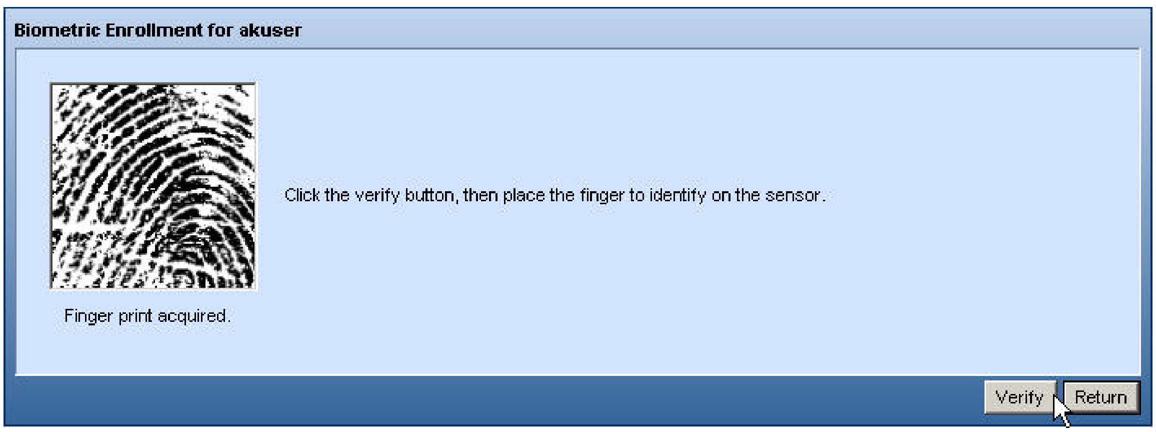
…and then place the finger to identify on the sensor:



DAVE™ will read the fingerprint and attempt to match it to a print on file in the **DAVE™** database.



If a match is found then the page will refresh and a success message posted on the bottom of the page. If no match is found then an error message will be generated instead.

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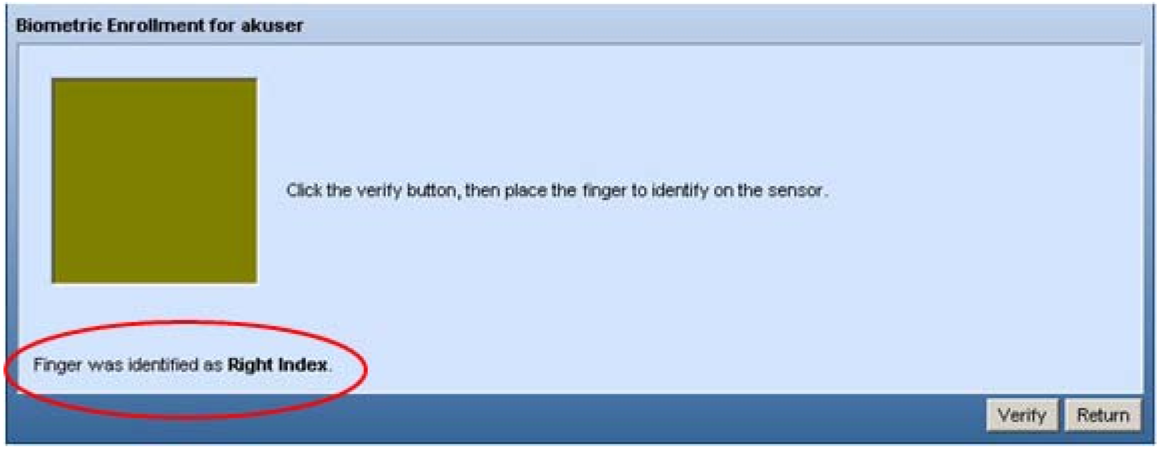

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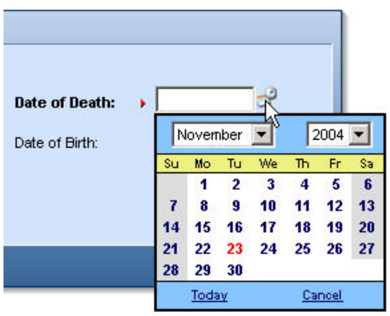
Appendices

Appendix 1: Glossary of Icons and Controls

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

 - **Auto-populate Button** – this is a control that can be clicked on using your mouse's left click button. This control is used in conjunction with a dropdown list to auto-fill information relevant to the entity selected within the dropdown list.

- **Auto-populate Tool Tip**: this is an onscreen tool-tip that appears whenever the cursor is allowed to 'hover' over an Auto-populate button. This is simply a visual indicator that the auto-populate feature can be used.



Calendar Control: this is an onscreen control containing several other controls. There are two dropdown lists, one for selecting the month and the other for selecting the year. The default calendar displayed will be for the current month and year with the current day displayed in red. Clicking on any day of any date will cause that date to be displayed in the corresponding **Date Entry** text box using a MMDDYYYY format.

 - **Calendar Icon**: this is an onscreen control that can be clicked on using your mouse's left click button. This icon is used in conjunction with Date Entry text boxes. Clicking on this icon will bring up the Calendar control that can be used to select a specific date.

 - **Checkboxes**: these are universal, onscreen controls that can be clicked on using your mouse's left click button. Checkboxes are used for making selections among various onscreen options. More than one checkbox can be selected at a time. (This compares to **Radio Buttons** which can only be selected one at a time.) **Checkboxes** exist in two states: **Checked** and **Unchecked**. To Check a checkbox just click in the box with your mouse. Clicking on unchecked checkboxes will place a checkmark () in the checkbox. Clicking on a checked checkbox will remove the checkmark.

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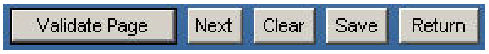
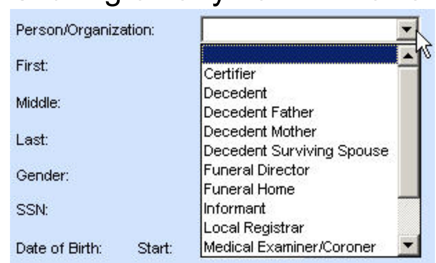
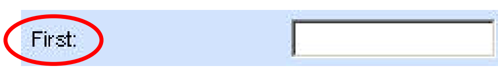


- **Click Buttons**: these are universal controls that can be clicked on using your mouse's left click button. They are used to accept data inputs, write information to databases and usually trigger the processing of underlying system code.

- **Dropdown Lists**: these are universal controls that can be selected from using your mouse's left click button. Clicking on the down-arrow button will cause a list of selectable options to dropdown. Clicking on any item in the list will select it and cause it to be displayed in the text box portion of the control.

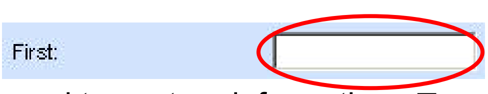


- **Fix Icons**: this is an onscreen icon that appears only in the **DAVE™ Validation Frame**. Clicking on this icon will send the cursor to an item containing invalid information so that it may be corrected.



Labels –are universal controls. Actually, most controls have labels. A **Label** tells you what type of information is displayed in a control or what type of information to place in a control. In our example here, the textbox control has a label containing the word **First:**. That tells you to place the Decedent's first name in this box.

- **Radio Buttons**: these are universal controls that can be selected using your mouse's left click button. Clicking on a radio button will fill in (●) it's circle. Unlike **Checkboxes**, which allow for multiple selections, only one **Radio Button** per group of buttons may be selected at one time. For example, you might use a radio button to select a brand of car to purchase, but use checkboxes to add all the features you want.



- **Text Entry Boxes**: these are universal controls used to capture information. **Text Entry Boxes** can be formatted to accept only text, a combination of text and numbers, numbers only, or dates. In this example, the **Text Box** is being used to capture a person's **First** name. In this case, the text entry box is formatted to prevent the entry of any numbers or special characters. Some **Text-Entry Boxes** are display only.

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

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

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

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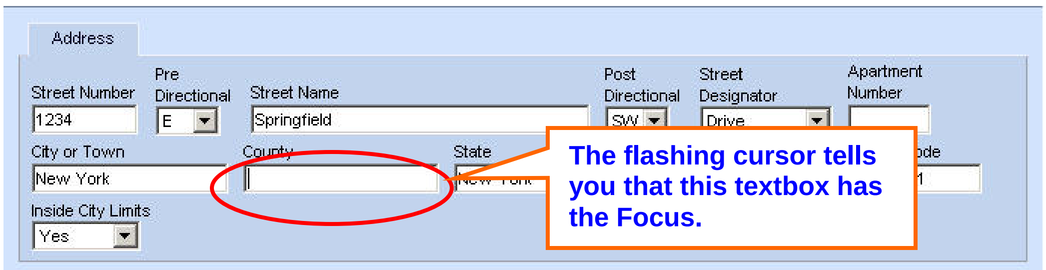
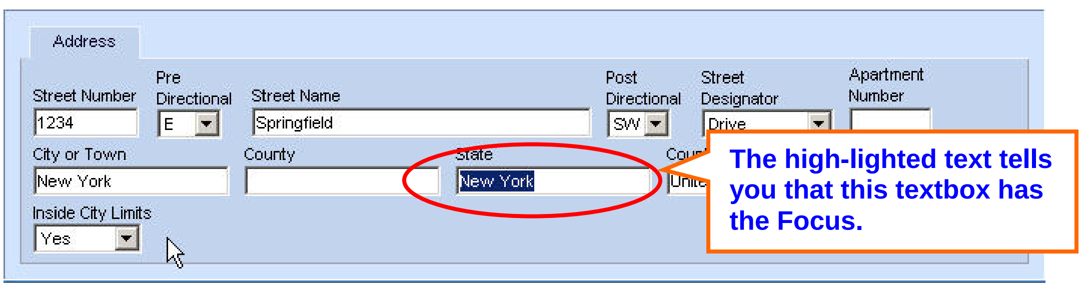
Appendix 2: Usage and Common Conventions

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

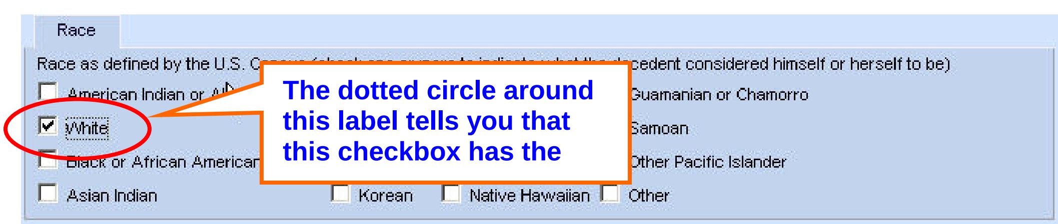
1. Focus – **Focus** determines which control on the page will receive the action. For example, if an empty text box has the focus then a flashing cursor will appear in the far left hand side of the box. Anything you type will appear in the text box.



If a pre-filled textbox has the focus then the text in that box will be highlighted. If you type here with the text highlighted, the current text will be deleted.



If a **Checkbox** or **Radio Button** receives the focus then a dotted line will surround the control's label



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2. Passing the Focus There are two ways to pass the focus to a control: clicking on the control with your mouse or pressing the **Tab** key until the desired control is highlighted. The most common way of placing the focus on a control is by clicking on the control

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with your mouse. This is also the slowest and least efficient way of passing the focus from one control to the next.

Instead, learn to use **Tab** and **Alt-Tab** to pass the focus back and forth among the controls. Using **Tab** will advance the focus forwards. **Alt-Tab** , which is triggered by holding down the **Alt** key while pressing the **Tab** key, will pass the focus back to the previous control.

Every page is structured a little differently. Exactly where **Tab** and **Alt-Tab** sends the Focus will vary, but it should always advance you logically from one control to the next.

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

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

If a **Checkbox** or **Radio Button** has the **Focus**, then pressing the spacebar will check or uncheck the control.

If a **Dropdown List** receives the **Focus** then you have several options:

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

If a Click Button receives the focus you have two options:

- Use the **Spacebar** to "press" the button, or
- Use the **Enter** key to "press" the button

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