

Funeral Home User Guide

VERS

VERS

Funeral Home User Guide

ManTech International
Suite 600
13755 Sunrise Valley Drive
Herndon VA, 20171

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Chapter 1 introduces you to VERS.

Chapter 2 presents information about different browsers that you may use, as well as when and how to request technical support.

Chapter 3 introduces you to the VERS dashboard.

Chapter 4 guides you through the record creation process including saving unfinished records, updating records, approving completed records, assigning and transferring cases, removing (cancelling) unfinished records, and creating/submitting amendments.

Chapter 5 provides guidelines for searching for one of your records.

Chapter 6 explains how to print.

Chapter

1

VERS: Getting Started

1 Introducing VERS

In this chapter

Regardless of whether you work with birth records, death records, marriage records, divorce records, ITOP records or customer orders there are **VERS** features that you will all see and use. This chapter explains what to expect when you start working in the **VERS** application and how to open the application.

Because the **VERS** system includes many modules (i.e., birth, death, etc.) this chapter may include references to and screen shots from multiple modules to best demonstrate application features. Specifically, this chapter contains the following topics:

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About VERS security

As you know, vital event records store important information. Because of this it is important that this information be protected. Protection begins each time you log in to the application. The logon procedure is designed to prevent unauthorized entry by others, as well as provide a way for you to recognize that the web site (**VERS**) that you have launched is indeed the real **VERS** site.

Important: The security of any system depends on its built-in security features and the actions and reactions of its users. If you suspect unauthorized or inappropriate use of **VERS**, you should report it to the help desk.

About this user guide

This user guide is organized into chapters to provide information and instruction regarding **VERS** functionality that you may need to do your vital records work. Procedures in this guide are presented as numbered steps. They tell you how to open the page or record you need to complete a task. They assume that if you are filling in a form, you are starting from the first field of the first page and going to the last field on the last page. If this is not the case, you can move through the pages in any order. Either way, it is likely that you will not need these instructions very often.

Figures used in this guide generally only include the first page of the record. To provide supplemental information about these figures the following symbols are used:



This arrow shows where to click on the near side of the figure.



This dashed arrow shows where to click on the far side of the figure.



This box arrow points out a list from which you should make a selection.



This cloud provides information beyond the information that is provided in the figure's caption.

Tips: It is good practice to always log out before leaving your work area, even if only for a moment!

If you are entering a record, you must return to the **VERS** Dashboard to access the **Logout** option after saving the record.

Security Alerts! After you logout, you should completely exit by closing all open browser windows.

If you do not log out, **VERS** may “time out.” Please refer to “System inactivity limits” on page 1-11 for more information about this feature.

Application conventions

To make it easier for you to enter information, the **VERS** application provides a variety of features that are used consistently throughout the application. These features include:

- **Required information:** Some information may be a mandatory requirement before you can continue to another field or process a transaction.
- **Protected information:** Field values that you are not able to modify appear in grey text.
- **Auto-populated information:** The application automatically populates some fields based on data you entered or selected in a previous field.
- **Application Messages:** The **VERS** application uses many messages to help guide you through your data entry. These messages may appear at the top of a data-entry record or in a separate window. For examples:
 - ◆ Some rules do not fire until you try to go to another page. Messages for these rules appear below the field.

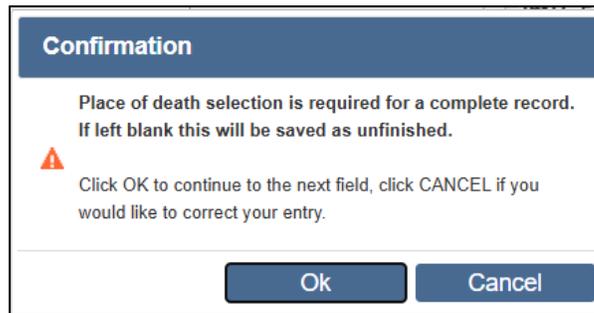
A screenshot of a data entry form. It shows a label "Date of death (MMDDYYYY)" followed by a red-outlined text input field. To the right of the field is a calendar icon. Below the field, there is a red warning triangle icon followed by the text "Date of death is required."

- ◆ Some fields are required; that is, you must enter information in these fields before you can move to another field or save the record. If you try to skip these fields, messages will alert you to the problem. The following shows this type of message. Note that it has one button only—the **OK** button. You must click this button to return to the field where you must enter the requested information.

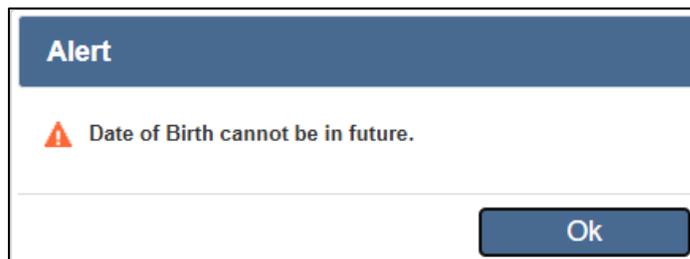
A screenshot of an alert dialog box. The title bar is blue and says "Alert". The main area has a red warning triangle icon followed by the text "Decedent's Last Name is required. If not known, please enter Unknown." At the bottom right, there is a blue button labeled "Ok".

- ◆ Some fields can be left blank during the data entry process, but information must be entered before the system recognizes the record as being complete. The following shows this type of message. Note that that this type of message has two buttons. Click **Cancel** to keep the cursor in the field so that

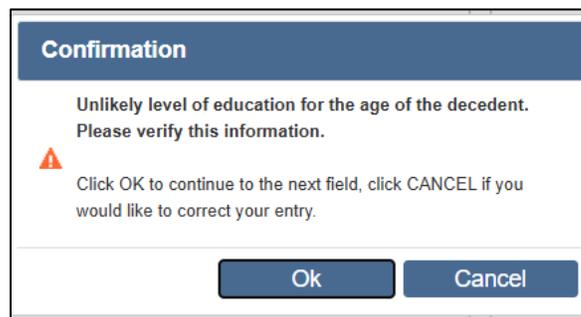
you can enter the information at this time or click **OK** to go to the next available field.



- ◆ Sometimes information you enter is an unacceptable entry, usually entered in error. In these cases, a message informs you that there is a problem. These messages have one button only—the **OK** button. You must click this button to return to the field where you must correct your entry.



- ◆ Sometimes information you enter is a questionable entry, which may have been entered in error. In these cases, a message informs you of the potential problem. This type of message has two buttons. Click **Cancel** to keep the cursor in the field so that you can correct the information or click **OK** to go to the next available field.



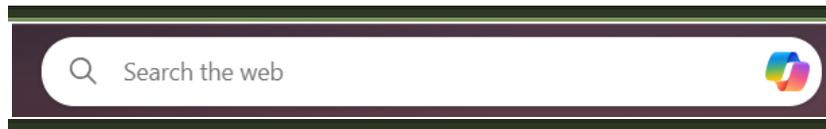
- **Tab Order:** As you enter information on any page, your cursor will move through the fields in a predetermined order. This order is called the tab order. You should use your **Tab** key to move forward through the fields and **Shift + Tab** to move backward. Using your **Tab** key is the recommended method of moving from field to field. This method allows for faster data entry than using a mouse to move the cursor.
- **Page Navigation:** You can enter data in order using the **Previous** and **Next** buttons or you can click on a tab to open pages in any order.

- **Cancel Button:** As with most applications, the **VERS** application has a **Cancel** button at the bottom of each page if you do not want to save your changes. Any previously saved information remains saved and unchanged in the database.

Launching VERS

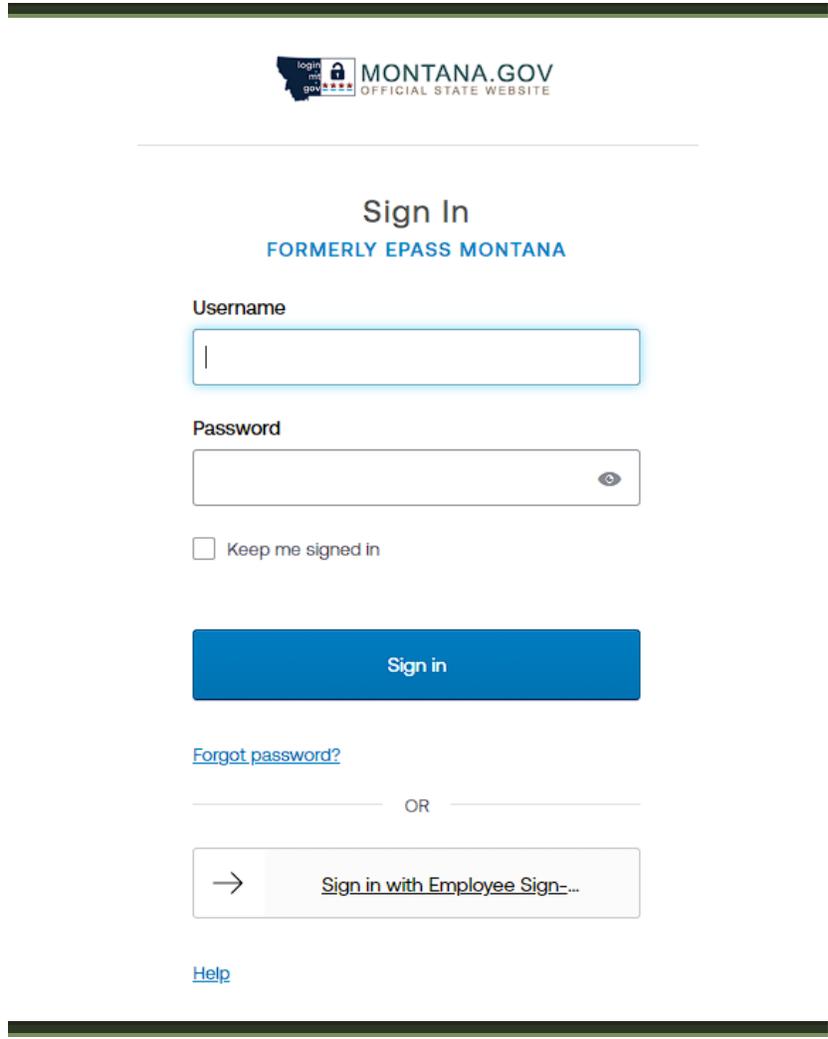
You will receive the URL and OKTA information when you set up your account information with the state. After your account is set up and you have entered the security information required by OKTA, you be able to open the VERS application. To do so:

- Step 1** Enter the internet address (URL) that points to VERS.

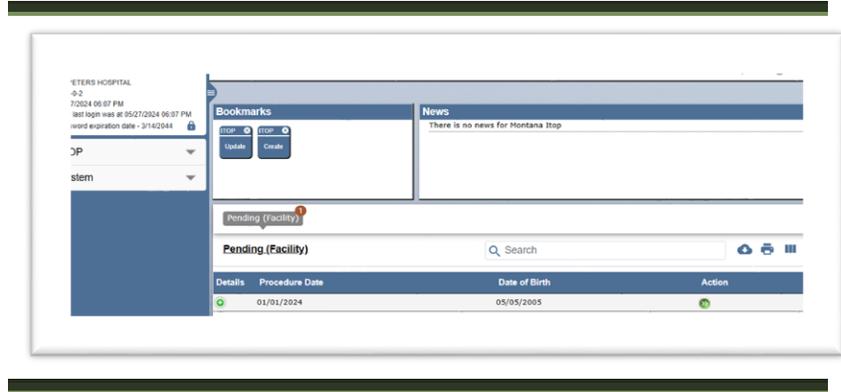


Tip: To avoid entering the URL each time you want to login, you can create and use a browser bookmark.

- Step 2** Enter your username and password. Then click Sign in.



Step 3 When you sign in, the VERS Dashboard opens. See Chapter 3 VERS Dashboard to learn more.



Data entry pages

When adding or modifying cases in any of the **VERS** modules (e.g., Death) you will notice that each data entry record has multiple pages. Each page of the record contains multiple fields categorized into sections as shown in the following figure.

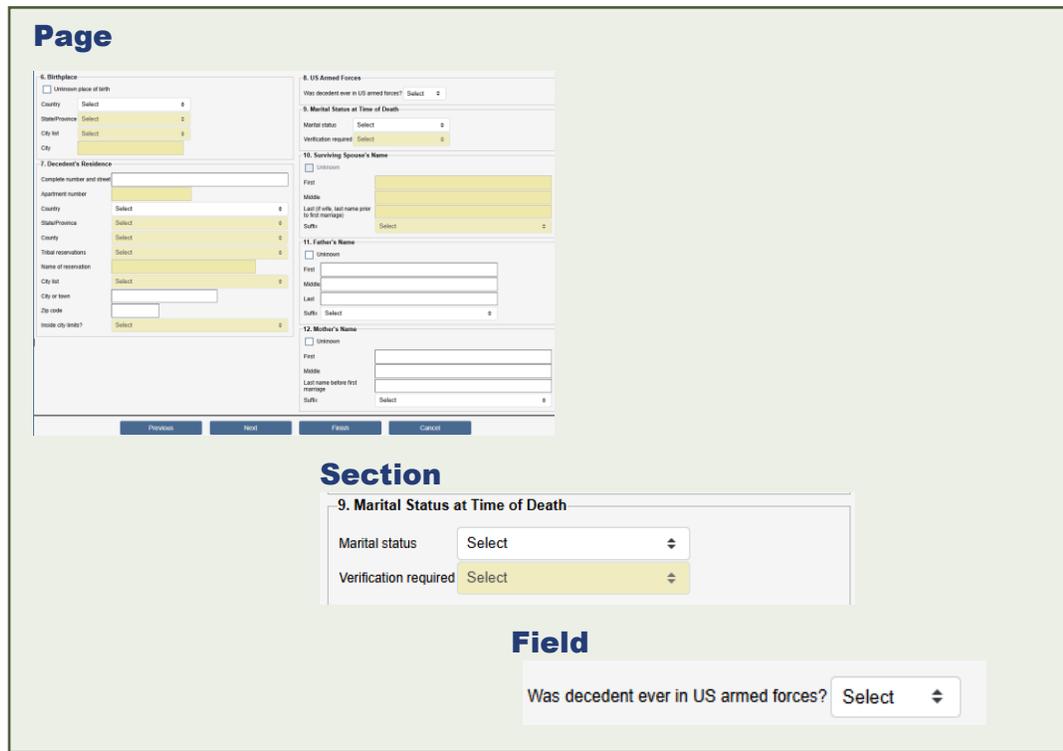


Figure 1-1 Page - Section - Field Relationships: A record may contain multiple pages; each page may contain multiple sections; and each section may contain multiple fields.

Page tips

Note the following when entering information in the **VERS** records:

- You can open a page by clicking the page's name in the left menu panel or by clicking the **Next** button to move forward through the pages or the **Previous** button to move back a page.
- If you do not see a page, it may be hidden. In some cases, a page only opens if the information requested on that page is pertinent to the record you are working on. For example, you may not see a page to enter AKA/aliases unless you have indicated that there are AKA/aliases associated with the record.
- You will be required to correct certain types of errors before you can continue.
- You will be reminded to enter information required for saving a complete case and what to enter if an actual value is unknown.
- The selections you make in drop-down lists (e.g., state) may determine what appears in subsequent drop-down lists (e.g., county).
- Remember to click the **Finish** button to save your work.

Keyboard Shortcuts

You can use your keyboard to make data entry faster. Below are some tips that you may or may not already know.

- Press your **Tab** key to move forward.
- Press your **Shift + Tab** keys to move back.
- Checkbox: Use your **spacebar** to select or deselect.
- Press your **Alt + T** keys to insert the current date (without having to type it in manually).
- Drop-down list: Begin typing your selection until the list jumps to that selection.
- Press your **Alt + N** keys to open the next page of the form.
- Press your **Alt + P** keys to open the previous page of the form.
- Press your **Alt + Page Up** keys to open the first page from any other page of the form.
- Press your **Alt + Page Down** keys to open the last page of the form from any other page of the form.
- Press your **Alt + ↓** keys to “open” a list box.
- Press your **Ctrl + F** keys to specify text you want to find on a page.

Help/Field definitions

If you are unsure as to what information goes in a particular field, position the cursor over the field label (e.g., First name) When you hold the cursor over the label, no clicking

necessary, you will see hover text appear as to what type of information you should enter in that field.

Time of death	01:01
Time of death	Enter the time of death if known. If not known, enter 9999.

Figure 1-2 Sample Field Definition: This shows the hover text or tool tips for a field. It appears when you move the mouse over the field label.

Duplicate record alert

Whenever you start a record, the system performs a duplicate record check. The purpose of this is to identify record(s) that potentially match the one you are entering so that you are not duplicating your work effort and to avoid the need to cancel records. If no match is found, the full form opens so you can continue filling out the form.

If the system finds such a record, a potential duplicate record warning will be displayed.



Last Name	First Name	Date of Death	County of Death	Sex	Funeral Home	Certifier Location	SFN	Reg	Action for FH	Action for MC
SMITH	JOHN	09/27/2024	BEAVERHEAD	M	RETZ FUNERAL HOME AND CREMATORY		0		»	

1 to 1 of 1

Rows per page: 25 |< < 1 > >|

Create New Case Exit

Figure 1-3 Sample Duplicate Information Warning: This message informs you that the record you are entering may already exist. If it is already in the system, you do not need to re-enter it.

Notice the Action for FH column. If this is the record (already one of your location's records), you can click the double arrow to open the record. Or if you know that it is not the same as the one you just started to create you can click **Create New Case**. If you are not sure if it is a duplicate, you can click **Exit** and investigate further to determine if you are trying to enter a duplicate record.

If the record shown does not belong to your location, you will not see a double arrow. The location that owns the record is shown in the Funeral Home column. If you know that it is not the same as the one you just started to create, you can click **Create New Case**. If you are not sure if it is a duplicate, you can click **Exit** and investigate further to determine if you are trying to enter a duplicate record.

Logging out

Before you get started you should know how to get out of the system once you are in it. You should always use the **Logout** option upper right-hand corner of the **VERS** Dashboard.



Note: Besides logging out to exit the application, you should always log out before leaving your work area, even if only for a moment!

Security Alert! After logging out, you should always close all open Internet Browser windows to completely exit the application.

System inactivity limits

If you are working in the **VERS** system and are not actively entering information or navigating the menu for an extended period, your session may be terminated. This feature is included for extra security in the event your **VERS** work is interrupted, and you have not logged out of the system. If you have an open case, you will be notified before the application closes to give you the opportunity to continue work (Figure 1-4).

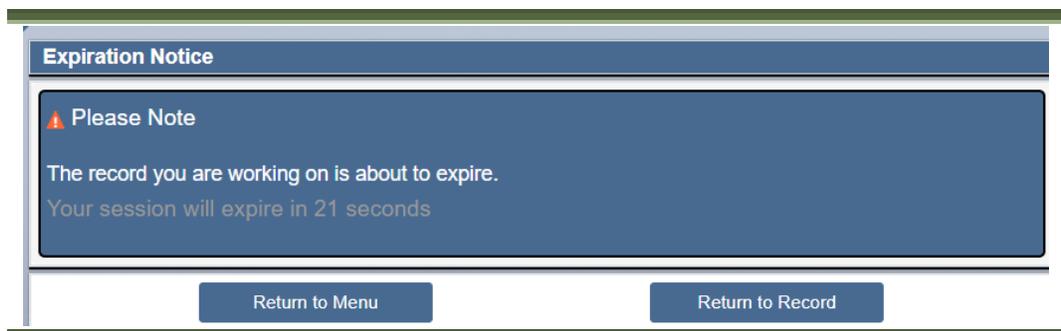


Figure 1-4 Sample VERS Expiration Notice: This alerts you that you are about to be logged out of the system and allows you to continue your current task.

If you notice the above **VERS Inactivity Timeout** message and want to continue working in the **VERS** application, click the **Return to Record** button. If you miss this opportunity, the application will close the open record automatically (Figure 1-5). If you miss this opportunity to keep the application open, you will have to log back in to resume work in the **VERS** system. Note that if this happens you may lose the information entered if you did not save it.

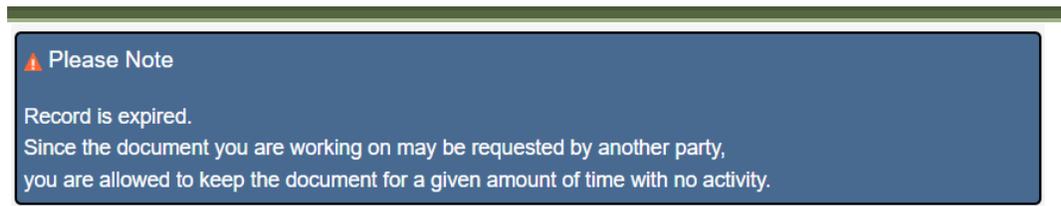


Figure 1-5 Sample VERS Inactivity Timeout Message: This alerts you that your session timed out.

Chapter

2

Technical Support

VERS

2 Technical Support

In this chapter

This chapter explains what to do if you encounter problems when using the **VERS** application. If you are still having problems after trying the recommended resolution, or if you are not comfortable implementing any of the recommended resolutions, you should refer to “About technical support for VERS” starting on page 2-5 or contact your **VERS** help desk at 406-444-9500.

Note: You should call the help desk (406-444-9500) if you need to reset your password (OKTA).

Specifically, this chapter contains the following topics.

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Technical requirements

The **VERS** application is designed for viewing and use on a standard high-resolution color monitor with the screen display set to (at least) 800 X 600 pixels. Screen resolutions at less than 800 X 600 (for example, 600 X 480) will enlarge the pages, buttons and fields, but may make navigation through the application more difficult (more scrolling).

Higher resolutions are acceptable. Higher resolution will not change functionality and you will be able to view more information on some pages, but text and images will appear much smaller and may be difficult to read.

To run the **VERS** application and print your documents you need to have downloaded/installed an internet browser. The recommended browsers are Edge, Firefox and Chrome.

These browsers are available at no cost via the internet. If one of these browsers is not already installed, go to <https://www.mozilla.org/en-US/firefox/new/>, <https://www.google.com/chrome/> or <https://www.microsoft.com/en-us/edge> and follow their instructions for downloading their product. Contact your helpdesk for further assistance

Prerequisites for browser configuration

If you experience problems with how VERS works in your browser, especially when printing, please check the items listed in this section. If you need more information about checking and/or changing browser settings, please contact your IT department or help desk. The following information is provided as a guideline: The way to make the suggested adjustment depends on your browser type and version.

Add application URL to browser trusted sites

Your VERS website's URL should be added to your browser's list of trusted sites. The way to set this up depends on your browser. Find your browser below and follow the steps for that browser.

Note: You may need to have your local IT department set the URL as a trusted site on the network.

Microsoft Edge

- 1) Search in the **Start Menu** for the **Control Panel**.
- 2) Click or double-click the **Internet Options** icon.
- 3) In the *Internet Properties* window, click the **Security** tab.
- 4) Select the **Trusted sites** entry and click the **Sites** button.
- 5) Enter the URL for your **VERS** website in the **Add this website to the zone** text field.
- 6) Click the **Add** button, then click **OK** to save the website addition.

Mozilla Firefox

- 1) Click the menu icon in the upper right-hand corner of the browser.
- 2) Click **Options**.
- 3) Click **Privacy and Security**.
- 4) Scroll down to the "**Permissions**" section and click on **Exceptions** to the right of "Warn you when websites try to install add-ons."
- 5) Type the URL for your **VERS** website into the "Address of website" field.
- 6) Click **Allow**.
- 7) Click **Save Changes**.

Google Chrome

- 1) Click the Chrome **Menu** icon on the far right of the **Address bar**.
- 2) Click on **Settings**, scroll to the bottom and click the **Show Advanced Settings** link.
- 3) Click on **Change proxy settings** (under **Network**)
- 4) Click the **Security** tab > **Trusted Sites** icon, then click **Sites**.
- 5) Type the URL for your **VERS** website, then click **Add**.
- 6) Click **Close** > **OK**.

Safari

- 1) At the top of the screen, click **Bookmarks**.
- 2) Click "**Add Bookmark...**"
- 3) Click "**Top Sites**" from the dropdown menu.
- 4) Click **Add**.
- 5) Type the URL for your **VERS** website, then click **Add**.

iPad

- 1) Go to Settings app on the iPad
- 2) Select '**SCREEN TIME**'
- 3) Select '**Content & Privacy Restrictions**'
- 4) Make sure **Content & Privacy Restrictions** is toggled (in Green), then select **Content Restrictions**.
- 5) Select '**Web Content**'
- 6) If your restrictions are set to "Limit Adult Content", then click on the Add Websites button to enter the URL for your **VERS** website.

PDF opens in the same browser window

The documents you generate should open in a new window. If they do not, contact your local IT support group or call the Help desk.

About technical support for VERS

Your **VERS** help desk team can provide assistance in a variety of areas. You can help them help you by knowing when to ask for help and what information will help them help you.

When to request technical support

You may experience a situation where some part of the application is not doing what you want it to do or think it should do. This may be due to a configuration problem as explained in “Prerequisites for browser configuration” starting on page 2-3 or “PDF opens in the same browser window” on page 2-5. If not listed or if you still have problems, you should contact your local IT Support or your **VERS** help desk. Problems can fall into the following categories:

- Connectivity – These problems prevent you from accessing the **VERS**. Entry page or from successfully logging into the **VERS** system. You can check this by trying to access a different website. If you cannot access another website, then contact your Local IT. If the connection to **VERS** is lost, try pressing **F5** to refresh the page.
- Hardware – These would be problems with your computer, mouse, keyboard or printer. (Printing problems may also be application problems.) Please contact your Local IT.
- Application usage – These problems arise because you are uncertain how to use the application.
- Application problems or "bugs" – These problems are the ones where the application is not performing the way in which it should. For example, you can't save a record for which you have entered all required information.
- Database – These problems can result in unexpected Oracle (database) errors.

Note: Most Connectivity and Hardware problems will be the responsibility of your local IT Support, for other categories please contact your **VERS** help desk. Depending on the nature of your problem, it could be “fixed” immediately, or it may take a while to reproduce the problem, identify the cause, correct the problem, and release another version.

How to request VERS technical support

If you encounter a problem that requires technical support, you should contact your **VERS** help desk. If a support officer is not available or if you call outside of the regular business hours (9:00 to 5:00 Monday-Friday) you should leave a message. If this

happens, leave your name and telephone number and a help desk team member will return your call as soon as possible.

What to expect from technical support

When you talk to a help desk team member, you may be asked a variety of questions concerning how to contact you and the nature of the problem. The more information you can provide in response to these questions, the easier it may be to determine the cause of the problem and, therefore, the way to correct the problem.

- Information about you:
 - Your name
 - Where you work
 - Your telephone number
 - Your job role (why you access **VERS**)
- System information
 - Browser name and version
 - Which **VERS** module/function you were using when the problem occurred
- Problem information
 - Describe the problem, giving as much detailed information as possible including the sequence of actions prior to the problem.
 - Are there any error messages?
 - Have you been able to complete the task successfully in the past?
 - Have you experienced this problem before?
 - Can you recreate the problem?

Chapter

3

VERS

Dashboard

VERS

3 VERS Dashboard

In this chapter

This chapter provides an overview of the “look and feel” of the VERS dashboard. Note that the screen shots show what a funeral director sees; however, the processes described are the same regardless of your user role.

Dashboard (See Dashboard (Home Page) on page 3-3)

The VRVCloud dashboard has many features. This document shows answers to the following:

- Where are the menu options? See “Dashboard Navigation panel” on page 3-3.
- Do I always have to select a menu option? See “Add/remove bookmarks” on page 3-4.
- How can I access helpful information? See “Other actions” on page 3-4.
- How can I change my location if I am a multiple-location user? See “Other actions” on page 3-4.
- How do I log out? See “Logout” on page 3-5.
- Where is the news message panel? See “News” on page 3-5.
- What is the purpose of the icons in the queue panel, and how can I use them? “See Work Queues” on page 3-5.

Create New Record

- How do I start the process of creating a new record? See “Create a record” on page 3-9.
Note: you will only see this option if your user role allows you to create records.

Update a Record

- How do I start the process of updating a record? See “Update a record” on page 3-10.

Search Results

- What is the purpose of the icons on the search results panel, and how can I use them? See “Search Results Page” on page 3-11 for a look at the search results page and See “Work Queues” on page 3-5 for information about icons and how to use them.

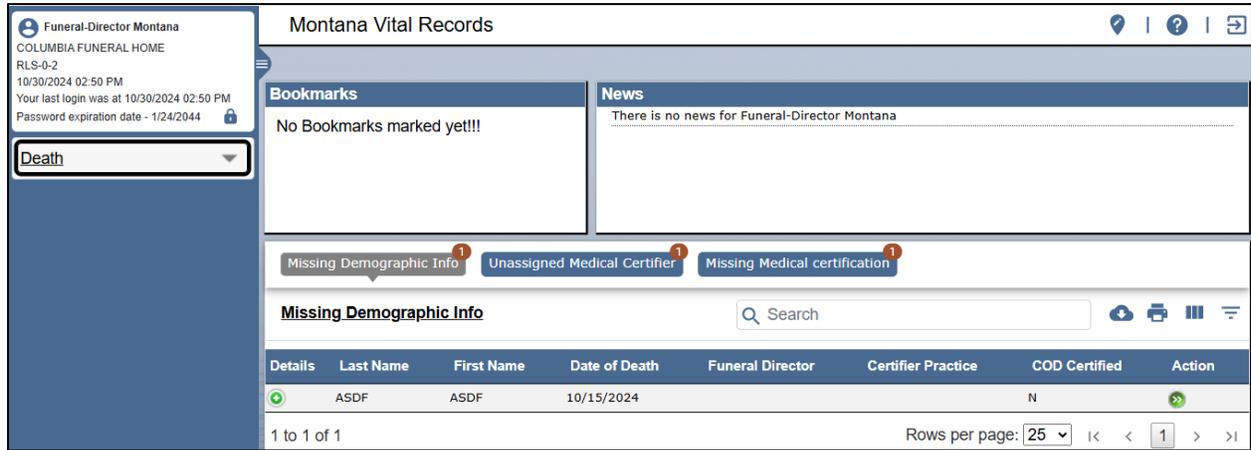
Record Data Entry Pages

See “Record data entry pages” on page 3-12 to see how you can return to the dashboard or logout.

See “Screen navigation panel” on page 3-13 for answers to the following.

- Can I see what sections are on a page without opening each page?
- Can I see what fields are in a section without opening the page?

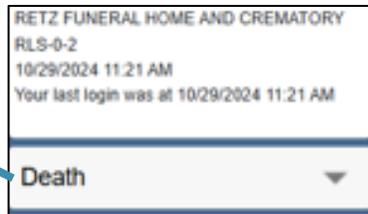
Dashboard (Home Page)



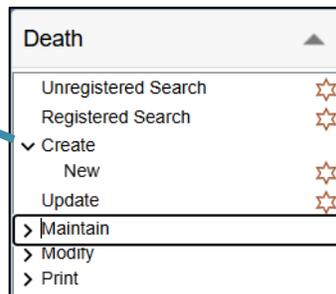
Dashboard Navigation panel

Expand/collapse the menu

Click items with arrows to expand and collapse the menu.

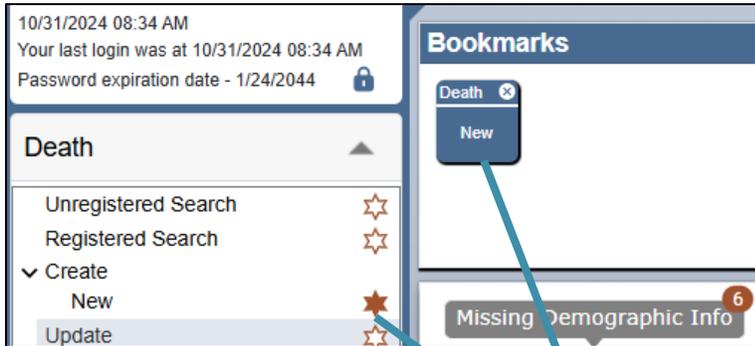


Click items with arrows to expand and collapse submenus.



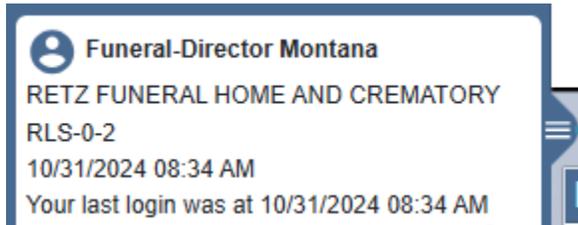
Add/remove bookmarks

Bookmarks can be used instead of the navigational panel.



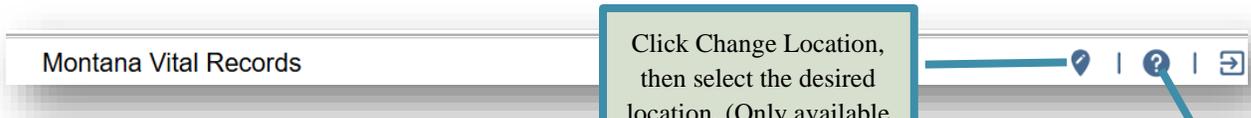
Click a star to add or remove a bookmark

Hide/show navigation panel



Click to hide or show the navigation panel.

Other actions



Click Change Location, then select the desired location. (Only available if you are assigned to multiple locations.)

Click the Help button to see available help links, then click the desired link.

News

The screenshot shows a sidebar with a 'Bookmarks' section containing an 'ITOP' item with a 'Create' button. The main content area is titled 'News' and displays a welcome message: 'Welcome to VERS! Ready for you to create and file ITOP records'. A callout box points to this message with the text: 'Read your system news here.'

Logout

The screenshot shows the top header bar of the application, which reads 'Montana Vital Records'. On the right side of the header, there are several icons: a location pin, a vertical bar, a question mark, and an exit icon. A callout box points to the exit icon with the text: 'Click the exit icon to log out of the application.'

Work Queues

The screenshot shows the 'Work Queues' interface. At the top, there is a 'Pending (Facility)' queue with a red notification badge showing the number '1'. A callout box points to this badge with the text: 'Click the desired queue. The number shows how many records are on the queue.' Below this, there is a search bar and a table of records. The table has columns for 'Details', 'Procedure Date', 'Date of Birth', and 'Action'. A single record is shown with a procedure date of '01/01/2024' and a date of birth of '05/05/2005'. At the bottom, there is a pagination control showing '1 to 1 of 1' and 'Rows per page: 25'.

Show/hide additional record details

Missing Demographic Info ⁶ Missing Medical certification ³ Approve ¹ Declined Record ² Missing State Approval ⁵

Approve    

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
	JILL	JACK	10/01/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	

1 to 1 of 1 Rows per page: |<< < 1 > >>

Click the plus sign to show additional record details.

Click the minus sign or the Close button to hide the details.

Details	Last Name	First Name	Date of Death	Funeral Director	Certified
	JILL	JACK	10/01/2024	JOHN KRAKE	COMMUNITY HEALTH CARE Y

Additional Record Details

First	JACK	Date of death (MM/DD/YYYY)	10/01/2024
Last	JILL	Date of birth (MM/DD/YYYY)	02/18/1989
State comments	History 10/18/2024 User 1050002 created record -- 10/18/2024 User ID 1050002 assigned case to MONTGOMERY PAUL at COMMUNITY HEALTH CARE -- 10/18/2024 User ID 1050002 assigned case to MONTGOMERY PAUL at COMMUNITY HEALTH CARE		

Click process to update the record.

Search for a record on the queue

Start typing what you want to find.

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
	DEC-LNAME	DEC-GNAME	08/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	
	PRONOUNCER	CHECK	10/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	N	

Export queue contents

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
	MOUSE	MICKEY	07/19/2024	JOHN KRAKE	BEAVERHEAD COUNTY CORONER	Y	
	BUG	BIG	07/26/2024	STAN HARDING	COMMUNITY HEALTH CARE	Y	
	DEC-LNAME	DEC-GNAME	08/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	
	STARTED	CORONER	09/23/2024	JOHN KRAKE	BEAVERHEAD COUNTY CORONER	N	
	PRONOUNCER	CHECK	10/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	N	
	COLD	NOTSO	10/29/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	

Export

Excel CSV PDF

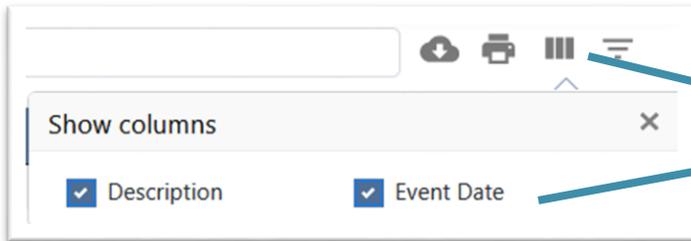
Click the export icon, then click the desired file type.

Print queue content

Click the print icon to begin the print process.

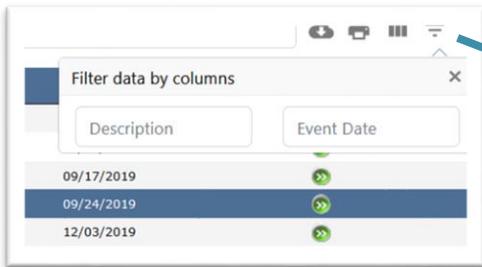


Change displayed columns

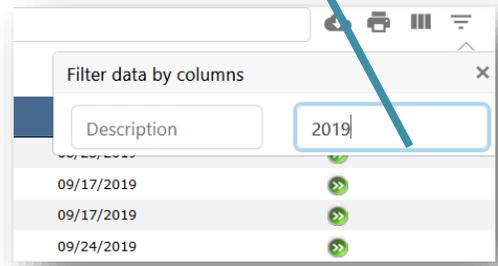


Click the columns icon, then check the desired columns.

Filter records



Click the filter icon, then enter the filter value.



Adjust number of rows to show

The screenshot shows a table titled "Missing Demographic Info" with columns: Details, Description, Event Date, Certified, and Action. A dropdown menu is open over the "Rows per page" field, showing options: 50, 100, 150, and All. The table contains four rows of data.

Details	Description	Event Date	Certified	Action
▶	BRYANT WILLIAM 09/24/2019	09/24/2019	N	50
▶	PHILLIPS MARY 12/19/2019	12/19/2019	N	100
▶	THIESSON NIEL 01/02/2020	01/02/2020	Y	150
▶	PHILLIPS MEGHAN 01/02/2020	01/02/2020	N	All

Select the number of records to show on the same page.

Create a record

The screenshot shows a sidebar menu with the following items: Unregistered Search, Registered Search, Create, New, and Update. The 'New' item is highlighted with a blue line. A 'Bookmarks' section is also visible with 'Death' and 'New' options.

Click the Create Bookmark if it is available or the Create New menu option.

Update a record

Use Update menu option or bookmark or select record from the Queue.

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
+	MOUSE	MICKEY	07/19/2024	JOHN KRAKE	BEAVERHEAD COUNTY CORONER	Y	➡
+	BUG	BIG	07/26/2024	STAN HARDING	COMMUNITY HEALTH CARE	Y	➡
+	DEC-LNAME	DEC-GNAME	08/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	➡
+	STARTED	CORONER	09/23/2024		BEAVERHEAD COUNTY CORONER	N	➡
+	PRONOUNCER	CHECK	10/14/2024		COMMUNITY HEALTH CARE	N	➡
+	COLD	NOTSO	10/29/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	➡

Click the plus sign to show additional record details, then click the Process button.

Or...

Click the double arrow Action icon.

Additional Record Details	
First	BIG
Last	BUG
Date of death (MMDDYYYY)	07/26/2024
Date of birth (MMDDYYYY)	01/01/1940
State comments	
History	07/26/2024 User 1050002 created record - 07/26/2024 User ID 1050002 assigned case to COMMUNITY HEALTH CARE - TACOMA -- 07/26/2024 User ID 1050002 assigned case to COMMUNITY HEALTH CARE - TACOMA -- 09/23/2024 User ID 9 unapproved case
Close Process	

Search Results Page

Records List (Showing 1 - 7 of 7 records)

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Record ID	Last Name	Mid Name	First Name	Date of Death	Disposition Date	Demographic Status	Cause Status	Manner	Date Created
L1726770	STARTED		CORONER	09/23/2024		Case pending	Case pending		09/24/2024...
L1841770	JILL		JACK	10/01/2024	10/22/2024	Ready for appro...	Certified	Natural	10/18/2024...
L1821769	PRONOUNCER		CHECK	10/14/2024		Case pending	Case pending	Natural	10/14/2024...
L1816769	SEND		DONT	10/14/2024		Approved	Certified	Natural	10/14/2024...
L1881772	JONES		JAMES	10/23/2024	10/25/2024	Approved	Certified	Natural	10/28/2024...
L1891769	COLDER		EVEN	10/28/2024	10/28/2024	Approved	Certified	Natural	10/28/2024...
L1896769	COLD		NOTSO	10/29/2024		Case pending	Certified	Natural	10/30/2024...

1 to 7 of 7 Rows per page: 25 |< < 1 > >|

Cancel

See "Work Queues" on page 3-5 for information about these features.

Records List (Showing 1 - 7 of 7 records)

📄 ☰ ☰

Record ID	Last Name	Mid Name	First Name	Date of Death	Disposition Date	Demographic Status	Cause Status	Manner	Date Created
L1726770	STARTED		CORONER	09/23/2024		Case pending	Case pending		09/24/2024...
L1841770	JILL		JACK	10/01/2024	10/22/2024	Ready for appro...	Certified	Natural	10/18/2024...
L1821769	PRONOUNCER		CHECK	10/14/2024		Case pending	Case pending	Natural	10/14/2024...
L1816769	SEND		DONT	10/14/2024		Approved	Certified	Natural	10/14/2024...
L1881772	JONES		JAMES	10/23/2024	10/25/2024	Approved	Certified	Natural	10/28/2024...
L1891769	COLDER		EVEN	10/28/2024	10/28/2024	Approved	Certified	Natural	10/28/2024...
L1896769	COLD		NOTSO	10/29/2024		Case pending	Certified	Natural	10/30/2024...

1 to 7 of 7 Rows per page: 25 |< < 1 > >|

Cancel

Record data entry pages

Click the Home icon to return to the Dashboard. If you click this while in the record, you changes will not be saved.

Funeral-Director Montana
RETZ FUNERAL HOME AND CEMETERY
RLS-9-2
10/31/2024 09:40 AM
Your last login was at 10/31/2024 09:40 AM

Montana Vital Records

Death -- First:NOTSO Last:COLD Date of death (MMDDYYYY):10/29/2024 Signed by:PAUL MONTGOMERY, MD Death - Update

Edit Information

- Un-certify and edit Medical Information **EDIT MI**
- Un-sign and edit Personal Information **EDIT PI**
- ME/coroner acting as funeral home

1. Decedent's Legal Name

First: NOTSO
Middle:
Last: COLD
Suffix: Select
Does decedent have AKAs? No
 Prefer parent/parent

2. Decedent's Sex

Sex: MALE

3. Decedent's Social Security Number

SSN: 999-99-9999
Reason not available: None

Previous Next Finish Cancel

Navigation panel.

Click buttons to navigate between pages, or to save (Finish) or Cancel your changes.

Screen navigation panel

The screenshot shows a vertical navigation menu with the following items:

- 1 Decedent (highlighted in blue, with a right-pointing arrow)
- 2 Case Assignment (with a downward-pointing arrow)
- 3 Decedent Info I (with a downward-pointing arrow)
- 4 Decedent Info II (with an upward-pointing arrow)
- > 51. Decedent's Education
- > 52. Decedent's Hispanic Origin
- > 54. Decedent's Occupation
- > 55. Kind of Business/Industry
- > 53. Decedent's Race
- 5 Informant/Disposition/Funeral Home (with a downward-pointing arrow)
- 6 Certifier/Pronouncer (with a downward-pointing arrow)
- 7 Cause of Death (with a downward-pointing arrow)
- 8 Manner of Death (with a downward-pointing arrow)
- 9 Injury Info (with a downward-pointing arrow)

Two callout boxes provide instructions:

- A box on the left says "Click to open a page." with a line pointing to the "1 Decedent" item.
- A box on the right says "Click arrows to show or hide the sections on the page." with a line pointing to the upward-pointing arrow on "4 Decedent Info II".

Chapter

4

Working with Death Records

VERS

4 Working with Death Records

In this chapter

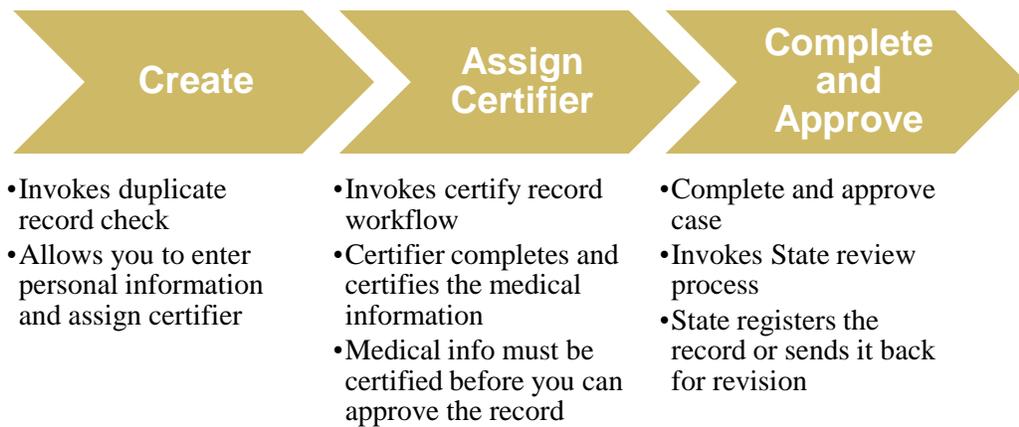
This chapter explains the process of creating, completing and approving Death records. It also provides instructions for amending your registered records. Specifically, this chapter contains the following topics:

4 WORKING WITH DEATH RECORDS	4-2
IN THIS CHAPTER	4-2
INTRODUCTION	4-2
CREATING A DEATH RECORD	4-3
<i>How to create cases</i>	4-3
<i>How to proceed if duplicate record(s) found</i>	4-10
Matching record is owned by your location	4-10
Matching record is owned by another location.....	4-10
<i>How to save your record</i>	4-11
CASE ASSIGNMENT PAGE	4-12
<i>How to assign case to a medical facility</i>	4-12
<i>How to assign case to a certifier</i>	4-13
<i>How to assign case to a coroner</i>	4-13
VERIFICATIONS	4-13
<i>SSN verification</i>	4-13
<i>Information Verification</i>	4-15
UPDATING RECORD INFORMATION	4-15
<i>How to update records</i>	4-15
THE SUCCESSFUL TRANSACTION PAGE	4-16
<i>How to print from the Print Confirmation section</i>	4-16
<i>How to mark a record as ready to approve from the Other Options section</i>	4-17
<i>How to approve a record from the Other Options section</i>	4-18
CANCELING A RECORD.....	4-19
<i>How to cancel a record</i>	4-19
AMENDING RECORDS.....	4-20
<i>How to submit an amendment</i>	4-20
<i>How to resubmit an amendment</i>	4-21

Note: Not all functions and fields discussed in this chapter are available to all users.

Introduction

This chapter includes instructions on how to complete a death record. This process begins when you create the case and ends when you indicate that you approve the completed record.



Creating a Death Record

The instructions in this section tell you where to find the correct menu option you need for creating a new case, what pages and sections are on the record, and provide various tips to guide you through the process of filling out the record. If the place of death is not in Montana, you cannot not enter the record in VERS.

Note: It is good practice to save your record periodically. Please refer to “How to save your record” starting on page 4-11 if you are not familiar with this process.

How to create cases

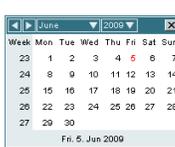
The procedure below includes references to all sections on the record; however, your user role may restrict the fields to which you have access.

Note: The instructions in this chapter assume that you have all the information needed to enter all information to save a complete record. If this is not the case, you may open the pages in any order to enter the information you have collected. Remember to save your work. The process of saving begins when you click the **Finish** button at the bottom of any page as explained in “How to save your record” starting on page 4-11. See “Updating record information” on page 4-15 for instructions on continuing work on a pending (i.e., unfinished) record.

To create a death case:

- Step 1** From the Main menu click **Death → Create → New**. The *Start Case* page appears (Figure 4-1).

Figure 4-1 Start Case Information: Information on this page is required and serves as search criteria to see if the case already exists.



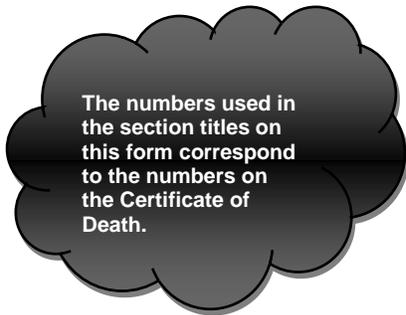
- Step 2** Enter the requested information in all sections on this page. To enter the **Date of death** or the **Decedent's Date of Birth** from a calendar, click the calendar icon next to the date field and then find and click the correct date. Alternatively, you may enter the date by entering a two-digit month, two-digit day and four-digit year. The system adds slashes (e.g., 01212025 is formatted as 01/21/2025).

- Step 3** Click the **Search** button. The system searches existing cases to find those that potentially match the one you are creating.

- Step 4** If no potential matches are found, the first page of the form opens with the information you entered on the *Start Case* page already entered. If any potential matches are found, you will see a list of potential matches. Refer to section “How to proceed if duplicate record(s) found” on page 4-10 for information about what to do if this happens.

Tips: The *Decedent* page includes fields that you must complete to be able to save the case.

You can save the case by clicking the **Finish** button any time after you enter the required information on the *Decedent* page. Until the case is approved/filed you may add or correct information as explained in “Updating record information” starting on page 4-15.



The numbers used in the section titles on this form correspond to the numbers on the Certificate of Death.

Figure 4-2 Death Form: This page is populated with the information you entered on the Start Case page.

Tip: Tabs 1, 3, 4, and 5 contain personal information. The medical information begins on tab **6 Certifier/Pronouncer**

Step 5

Enter/modify or select information in the **Edit Information, Decedent’s Legal Name, Decedent’s Sex, Decedent’s Social Security Number, Decedent’s Date of Birth and Age, Actual or Presumed Date and Time of Death, and Place of Death** sections.

Application notes for the *Decedent* page:

Note: The Edit information section allows you to edit personal information on a record you approved as long as the State has not completed their review of the record.

- In the **Decedent’s Legal Name** section:
 - If the decedent has any AKA/alias, select **YES** to **Does decedent have AKAs?** In this case, the Decedent AKAs page opens when you click Next so that you can enter the AKA/alias.
 - Check the **Prefer parent/parent** checkbox if the informant wants parent/parent to be used when printing the certificate instead of mother/father
- When the **First name, Last name, Sex, Date of Birth** and **Social Security number** info is entered, this information will be sent for SSN verification when you save the record. For more information about SSN verification, please refer to “SSN verification” on page 4-13.
- If you are not able to obtain the SSN, select the reason it is not available.

- In the **Decedent's Date of Birth and Age** section:
 - The selected **Age measure** determines what other information you will be able to enter in the other Age fields (i.e., years, months, etc.).
 - The age is calculated and displayed in the corresponding age field. If this is not the correct age, you should verify that you have entered the correct Date of birth and the correct Date of death.
 - You will have to enter the age that is correct for the date of death and the date of birth before you can successfully finish the personal information section.
- In the **Actual or Presumed Date and Time of Death** section **Date modifier** and **time indicator time** are automatically set when you create a record. You can change these as needed.
- In the **Place of Death** section:
 - After you select the **Place of Death** and **County**, the other fields open for data entry.
 - Your selection of **Place of Death** determines whether the **Hospital list** becomes enabled.
 - When you select from the **Hospital list**, the name and address are populated for you.
 - If the facility is not listed in the drop down, select **Hospital not in list** and enter the name and address manually.
 - Changing the **Place of death** may remove the place of death name and address information previously entered.
 - If you select **Check if residence is the same as place of death**, you will not be able to enter the place of death address. Instead, you will enter/modify the residence address on Tab 3. This address will be copied for you to the Place of Death address fields.
 - You must specify the other place if you select **OTHER** in the **Place of Death** list.
 - If you check the **Check if death occur on a reservation** checkbox, you can then select the **Reservation**.

Step 6 Click the **Next** button or use the **Alt + N** keys on your keyboard. If you indicated that the Decedent has AKA/alias, the *Decedent AKAs* page opens.

Note: If the decedent does not have any AKA/alias, the *Decedent AKAs* page does not open, and you should skip to Step 8.

Step 7 Enter or select information in the **Number of AKAs being added**, **First AKA** through **Fifth AKA** sections.

Application note for the *Decedent AKAs* page:

- Your answer to **How many AKAs will you be adding** determines how many AKA sections become available for data entry.

Step 8 Click the **Next** button, the **Case Assignment** page tab or use the **Alt + N** keys on your keyboard. The *Case Assignment* page opens.

Application notes for the *Case Assignment* page:

- Allows you to transfer a case to another funeral home and assign it to a medical certifier.
- See “Case Assignment Page” on page 4-12 for information about making assignments.

Step 9 Click the **Next** button, the **Decedent Info I** page tab or use the **Alt + N** keys on your keyboard. The *Decedent Info I* page opens.

Step 10 Enter or select information in the **Birthplace, Decedent’s Residence, US Armed Forces, Marital Status at Time of Death, Surviving Spouse’s Name, Father’s Name and Mother’s Name** sections.

Application notes for the *Decedent Info I* page:

- In the Birthplace section:
 - If the birth country is not known, select the **Unknown place of birth** checkbox.
 - If the birth country is the United States or Canada, but the state or province is not known, select **Unknown** in the **State/province** list.
 - If the country and state/province are known, but the city is not known, enter **Unknown** in the **City** textbox.
- In the **Decedent’s Residence** section:
 - If the address is not known, enter **Unknown** for the **Complete number and street** field.
 - If the country is not known, select **Unknown** in the **Country** list. In this case, you will not be able to enter any other information in this section.
 - If the country is the United States or Canada, but the state or province is not known, select **Unknown** in the **State/province** list. In this case, you will not be able to select a county, but you can enter the name of the city if know or enter **Unknown** in the **City** text box if it is not known.
 - If the **Zip code** is not known, enter **99999**.
 - If it is not known if the residence is **Inside city limits**, select **Unknown**.
- If the **Marital Status** of the decedent is married or separated, enter the spouse’s name in the **Surviving Spouse’s Name** section. If the name of the spouse is not known, select (check) **Unknown**.
- In the **Father’s Name and Mother’s Name** sections, if the name of the decedent’s mother and/or father is not known, select/check the corresponding **Unknown** checkbox.

Step 11 Click the **Next** button, the **Decedent Info II** page tab or use the **Alt + N** keys on your keyboard. The *Decedent Info II* page opens.

Step 12 Enter or select information in the **Decedent's Education, Decedent's Hispanic Origin, Decedent's Occupation, Kind of Business/Industry** and **Decedent's Race** sections.

Application notes for the *Decedent Info II* page:

- In the **Decedent's Education** section, you will be asked to verify the selected education level if it is not in alignment with the age of the decedent.
- In the **Hispanic Origin** section:
 - Select (check) the appropriate checkbox that best describes decedent's Hispanic Origin.
 - If you select **Yes, other Spanish/Hispanic/Latino**, enter additional information in the **Specify other** textbox.
- If the **Decedent's Occupation** and/or **Kind of Business/Industry** are not known, enter **Unknown**.
- In the **Race** section:
 - Select (check) all pertinent checkboxes.
 - Enter additional information in the textboxes as needed.

Step 13 Click the **Next** button, the **Informant/Disposition/Funeral Home** page tab or use the **Alt + N** keys on your keyboard. The *Informant/Disposition/Funeral Home* page opens.

Step 14 Enter or select information in the **Informant's Name/Relationship/Mailing Address, Method of Disposition, Place of Disposition, Funeral Facility, Funeral Licensee or Other Person in Charge of Disposition, and Date of Disposition** sections.

Application notes for the *Informant/Disposition/Funeral Home* page:

- In the **Informant's Name/Relationship/Mailing Address** section:
 - If the relationship of the informant to the decedent is not listed, select **Other**, and then enter the unlisted relationship in the **Other – specify relationship** textbox.
 - If the informant shared the same residence as the decedent, select (check) the **Copy decedent's residence address to informant's Address** checkbox to avoid re-entering the same information.
 - If the country is not known, select **Unknown** in the **Country** list. If the country is the United States or Canada, but the state or province is not known, select **Unknown** in the **State/province** list.
- If the **Method of disposition** is not specifically listed, select **Other** and then specify the method in the **Other – specify** textbox.
- In the **Method of Disposition** section your selection of the method determines what fields open in the **Place of Disposition** section.

- If the method is **Burial, Cremation** or **Entombment**, you can select the place from the **Cemeteries/Crematories/Entombments** list or enter the name and address manually.
- If the method is **Body not recovered** or **Unknown**, you cannot enter name and address information.
- For all other methods, you must enter the name and address manually.
- In the **Place of Disposition** section, you must enter the **Address and/or coordinates** for home burials when you select the **Home burial** checkbox.
- The **Funeral Facility** section contains information based on your logged-on location. You will not need to enter any information in this section.
- In the **Funeral Licensee or Other Person in Charge of Disposition** section, only those funeral directors associated with your facility are listed.
- You can request disposition approval by checking the **Disposition approval needed** in the **Date of Disposition** section.

Step 15 Click the **Finish** button at the bottom of the page. At this point the **VERS** system will display a list of missing information (Figure 4-3).

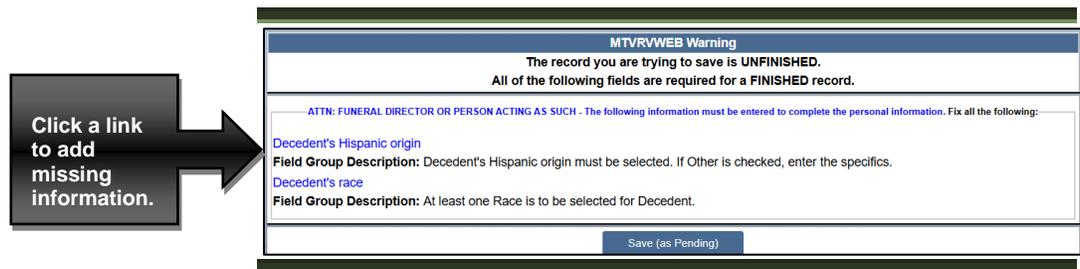


Figure 4-3 Sample Pending Information List: From here you can save the record as it is or reopen the record to add the missing information.

Step 16 At this point you can:
 Enter the missing information by clicking a link on the **VERS** Warning page to return to the record and add the missing information. When you are ready, click the **Finish** button as you did before in Step 15.

Or

Save the record as unfinished by clicking the **Save (as Pending)** button. If you still need to add information before submitting it to the state, you can update the case at a later time as explained in “Updating record information” on page 4-15.

Step 17 When you click the **Save (as Pending)** button, you will receive a successful transaction message as shown in Figure 4-4. You will also see a **Print Confirmation** section that allows you to print relevant death document(s) for your record. See “How to print from the Print

Confirmation section” on page 4-16 for more information about the print section.

Figure 4-4 Successful Transaction: From this page, you can print a selected document, return to the record, repeat the current task or return to the Main page.

- Step 18** Click the **Return to Record** button to continue work on the record. Otherwise click the **Main Menu** button or **Repeat Task** button.

How to proceed if duplicate record(s) found

If records matching the information you entered on the Create New Case page are found, what you can do next depends on who already owns the matching record.

Matching record is owned by your location

You have three options if your location is the funeral home on the record.

- Click the **double arrow** next to the record to continue working on it.
- Click **Create New Case** if you are sure that the case you want to create is not the one shown as a matching case.
- Click **Exit** if you are not sure which option to take and need to do some research.

Matching record is owned by another location



Last Name	First Name	Date of Death	County of Death	Sex	Funeral Home	Certifier Location	SFN	Reg	Action for FH	Action for MC
SMITH	JOHN	10/17/2024	BEAVERHEAD	M	ACACIA MEMORIAL PARK AND FUNERAL...			0	Owned by another Location	

You have two options if your location is not the funeral home on the record.

- Click **Create New Case** if you are sure that the case you want to create is not the one shown as a matching case.
- Click **Exit** if you are not sure which option to take and need to do some research.

How to save your record

Step 1 Click the **Finish** button at the bottom of any page. The **VERS** system displays a list of missing information. If all information has been entered, you will not see this page and you can skip to Step 3.

MTRVWEB Warning

The record you are trying to save is **UNFINISHED**.
All of the following fields are required for a **FINISHED** record.

ATTN: FUNERAL DIRECTOR OR PERSON ACTING AS SUCH - The following information must be entered to complete the personal information. Fix all the following:

[Decedent's Hispanic origin](#)
Field Group Description: Decedent's Hispanic origin must be selected. If Other is checked, enter the specifics.

[Decedent's race](#)
Field Group Description: At least one Race is to be selected for Decedent.

Save (as Pending)

Figure 4-5 Sample Warning Page: This page advises you that more information must be entered before you will be able to save a complete record.

Step 2 At this point you can:
Enter the missing information by clicking a link on the **VERS Warning** page to return to the record and add the missing information. When you are ready, click the **Finish** button at the bottom of any page.

Or

Save the record as unfinished by clicking the **Save (as Pending)** button. You can update the record at a later time as explained in “Updating record information” on page 4-15,

Step 3 Whether you enter all missing information and click **Finish** again or click the **Save (as Pending)** button, the *Successful Transaction* page opens (Figure 4-6). See “The Successful Transaction page” on page 4-16 for information about using the options on this page.



Successful Transaction	
Your transaction has been saved successfully.	
Record Details	
Decedent's First Name	YOUNG
Decedent's Last Name	YOUNG
Date of death	10/24/2024
Record ID	11886769
Print Confirmation	
Your actions have triggered the following documents to be printed. Please select all documents you wish to print.	
HIPPA Proof Copy:	<input checked="" type="radio"/>
Skip this print option:	<input type="radio"/>
ART form:	<input checked="" type="radio"/>
Skip this print option:	<input type="radio"/>
<input type="button" value="Print"/>	
Other Options	
Following options are available:	
<input type="button" value="Approve"/>	
<input type="button" value="Return to Record"/>	
<input type="button" value="Main Menu"/> <input type="button" value="Repeat Task"/>	

Figure 4-6 Sample Successful Transaction page: This page provides information and options further action.

- Step 4** Complete any options presented if you are ready to do so.
- Step 5** Click the **Main Menu** or **Repeat Task** button if you have finished the other options.

Case Assignment Page

This page allows you to assign a case to a medical certifier – physician or coroner and transfer a case to another funeral home.

Assign/Transfer to Funeral Home Assigned funeral home: ACACIA MEMORIAL PARK AND FUNERAL HOME - SEATTLE - (804)587-4587 Type/select funeral home's name or city <input type="text" value="Select"/>	Declined by Medical Certifier/Facility <input type="checkbox"/> Check this if you decline assignment Reason <input type="text" value=""/>
Assign/Transfer to Medical Certifier (select facility OR select certifier) Assigned facility: Type/select facility's name or city <input type="text" value="Select"/> Assigned certifier: Type/select certifier's name or facility <input type="text" value="Select"/>	Assign to ME/Coroner County of occurrence: BEAVERHEAD <input type="checkbox"/> Check this to assign directly to ME/Coroner Assigned ME/coroner office: NOT CURRENTLY ASSIGNED Select ME/coroner office <input type="text" value="Select"/>

How to assign case to a medical facility

- Step 1** In the **Assign/Transfer to Medical Certifier** section, start typing the name of the certifier's practice/office or the city where the practice is located. As you type, the list narrows to show entries that contain the text that you type.
- Step 2** Select the practice. When you save the record, the case is added to the workload for the practice you selected.

How to assign case to a certifier

- Step 1** In the **Assign/Transfer to Medical Certifier** section, start typing the name of the certifier or the name of the practice. As you type, the list narrows to show entries that contain the text that you type.
- Step 2** Select the certifier. When you save the record, the case is added to the workload for the certifier's practice.

How to assign case to a coroner

- Step 1** In the **Assign to ME/Coroner** section, check the checkbox to assign a case directly to the ME/coroner.
- Step 2** Select the coroner office (county) where the death occurred. When you save the record, the case is added to the workload for the coroner office you selected.

Verifications

Creating a case includes a process by which social security information is checked (verified) by the Social Security Administration (SSA). Another type of verification is needed to verify a value you have entered if that value is not consistent with expected values.

SSN verification

After you have entered all information required for the SSN verification process, the application sends this information to the SSA when you save the case. The information that is required consists of the decedent's first and last names, sex, SSN and date of birth as shown on Figure 4-7.

Figure 4-7 SSN Verification Fields: This shows the information that must be entered before the SSN verification process can be initiated.

Following the verification process the results are displayed in the **Verification status** field (Figure 4-8).

Figure 4-8 SSN Verification Status: Initially the status indicates that no SSN verification has occurred. Once information has been entered in the SSN verification fields and the record has been saved, the status will be updated.

Once the SSN is verified you may not change it. Results of the process may indicate the following:

- The verification was successful, and the information provided resulted in a match.
- The SSN provided is not an established number and has never been issued by SSA.
- The name and date of birth matched, but the gender did not.
- The name and gender matched, but the date of birth did not.
- The name matched, but the date of birth and gender did not.
- The name did not match, and the date of birth and gender were not checked.
- Unable to perform verification request. System may be down.

The number of times you can initiate the process is limited to five (5) attempts. You will receive a message if you try to initiate the process after the fifth attempt.

Once the SSN process results in a verified status, you may not change the SSN. You may, however, change any of the other information that was sent for SSN verification (i.e. first name, last name, sex and date of birth).

Information Verification

For certain fields your entry may not be in a pre-defined expected range. This may be due to a typographical error or it may be the correct value. To minimize the possibility of a typographical error, a message (Figure 4-9) will alert you to the potential problem. In this case you should check your information to be sure that you have entered it in correctly. If incorrect, please enter the correct value. If it is correct, you need to select the verification status in the Verification required list.

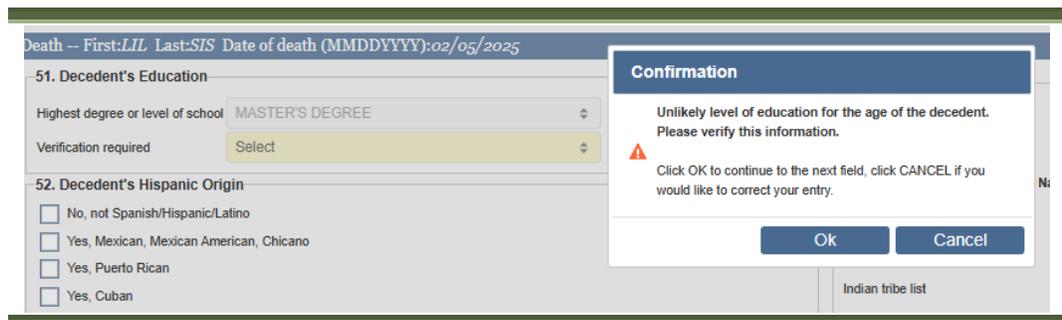


Figure 4-9 Sample Verification Needed Message: If you enter or select an out-of-expected range value a message appears asking you to verify the information.

Updating record information

If you were unable to complete and approve a record at the time you created it, you can complete it later as explained in this section. Once you complete and approve the record you will not be able to use this process to change information on the record.

How to update records

Any case that your funeral home owns remains on your dashboard's **Missing Demographic Info** queue until it is complete, and you approve it. You can update a record on this queue, or you can use the Update menu option.

To update a case from your work queue:

- Step 1** From your **Missing Demographic Info** queue, click the **double arrow** next to the record you want to update. The selected record opens.
- Step 2** Make your changes and then click the **Finish** button. Please refer to "How to create cases" on page 4-3 if you need additional information about entering information in the report.

To update a case from the menu panel:

- Step 1** From the Main menu click **Death** → **Update**. The *Search Criteria* page opens.

- Step 2** Enter your search criteria and click the **Search** button. A search results page displays records that match the criteria you entered.
- Step 3** Click the **double arrow** next to the record you want to update. The *Record Details* page opens.
- Step 4** Click the **Continue** button at the bottom of any *Record Details* page. The selected record opens.

Note: If you are unfamiliar with the search process or need more help, please refer to the chapter called “Viewing & Retrieving Records.”

- Step 5** Make your changes and then click the **Finish** button. Please refer to “How to create cases” on page 4-3 if you need additional information about the record or about saving a case.

The Successful Transaction page

When you save a record, you will see the *Successful Transaction* page. This page includes a **Print Confirmation** section that allows you to select and print any or all of the listed documents. The documents that are listed depend on the record and your user role.

The *Successful Transaction* page also includes an **Other Options** section that allows you to return to the record. Depending on the status of your record and your user role, it also includes buttons that initiate additional workflow.

How to print from the Print Confirmation section

The *Successful Transaction* page, the **Print Confirmation** section includes a list of documents and a **Print** button. The default is to print each listed document. If you do not want to print all listed documents, select the corresponding Skip this print option. If you do not want to print at this time do not press the Print button.

Figure 4-10 Print Confirmation Section of Successful Transaction page: Begin the process of printing a document from this section.

- Step 1** With the document/s you want to print selected, click the **Print** button.



Figure 4-11 Print Confirm page: Generate the document from here.

- Step 2** Click the **Generate Document** button. The generated document is shown in a new tab in your browser or in Adobe Acrobat where you can view and print the document.
- Step 3** After you have generated the document, click **Continue** to move forward in the process,

How to mark a record as ready to approve from the Other Options section

If the record you are working on is complete (medical information and personal information) you will see a **Ready to Approve** button in the **Other Options** section of the *Successful Transaction* page. This button is shown to persons designated as data entry staff (not funeral directors who are responsible for approving records).

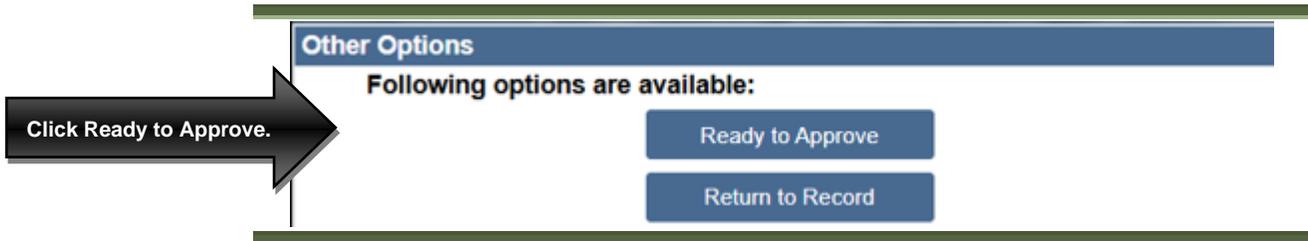


Figure 4-12 Other Options Section of Successful Transaction page: Begin the process of approving a record (data entry role) from this section.

- Step 1** Click the **Ready to Approve** button.

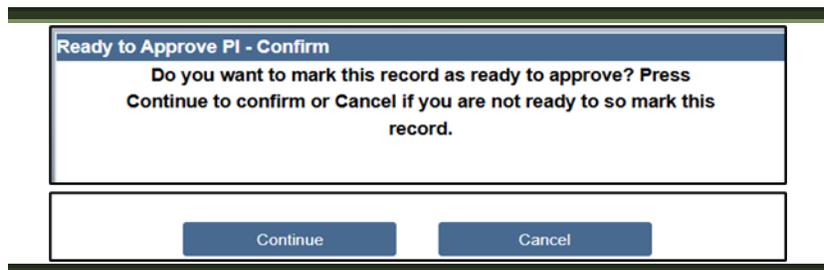


Figure 4-13 Confirm Ready to Approve PI: Continue the process of approving a record (data entry role).

- Step 2** Click **Continue** to complete the process and save you work as noted on the Successful Transaction page.

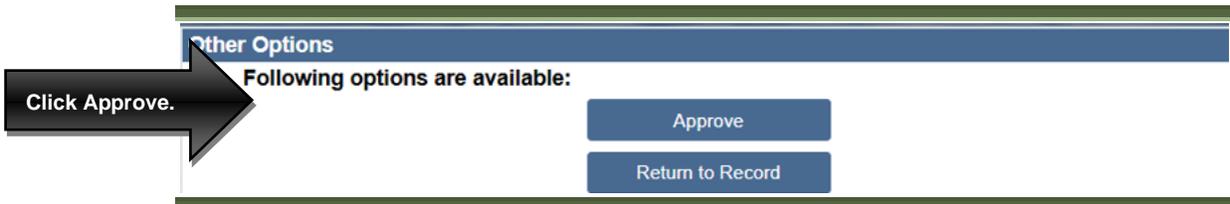
Successful Transaction	
Your transaction has been saved successfully.	
Record Details	
Decedent's First Name	NOTSO
Decedent's Last Name	COLD
Date of death	10/29/2024
Record ID	11896769
<div style="display: flex; justify-content: space-around;"> Main Menu Repeat Task </div>	

Figure 4-14 Successful Transaction: Record successfully saved. Click Main Menu to return to the Main Menu.

Note: Records ready to approve are added to the funeral director's Approve queue.

How to approve a record from the Other Options section

If you are a funeral director and the record you are working on is complete (medical information and personal information) and the medical information is certified, you will see an **Approve** button in the **Other Options** section of the *Successful Transaction* page.



Other Options	
Following options are available:	
<div style="display: flex; justify-content: space-around;"> Approve Return to Record </div>	

Figure 4-15 Other Options Section of Successful Transaction page: Begin the process of approving a record from this section.

Step 1 Click the **Approve** button.

Approve PI - Confirm	
I approve the content of this section of the death report. Information about the decedent was obtained from the informant listed. Disposition will occur at the time, date, and place and in the manner stated.	
<div style="display: flex; justify-content: space-around;"> Continue Cancel </div>	

Figure 4-16 Confirm Approve PI: Continue the process of approving a record (funeral director role).

Step 2 Click **Continue** to complete the process and save you work as noted on the *Successful Transaction* page.

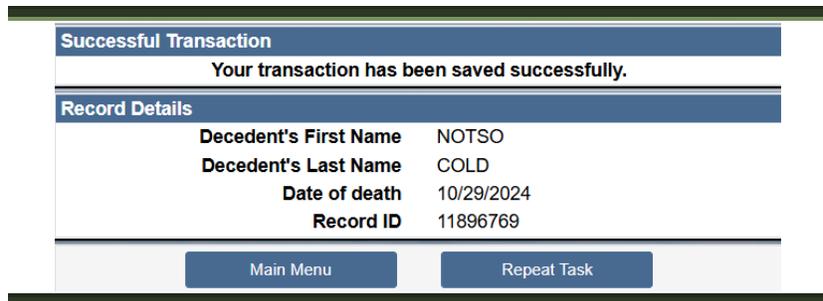


Figure 4-17 Successful Transaction: Record successfully saved. Click Main Menu to return to the Main Menu.

Note: Approved records are ready for State review.

Canceling a record

In the rare instance that you create and save a record in error (e.g., a duplicate record), you can do so via the **Cancel** menu option if the decedent’s SSN has not been verified and it is not registered. If you are unable to cancel it, contact the state.

How to cancel a record

- Step 1** Navigate to **Death → Maintain → Cancel**. The *Death Search Criteria* page opens so that you can search for the record that you want to cancel.
- Step 2** Use the *Search* page to find the record you want to correct. When you find the record, click **Details** for that record.

Note: Refer to the chapter called “Viewing & Retrieving Records” if you are unfamiliar with the search process.

- Step 3** Once the correct record appears on the *Record Details* page click the **Continue** button at the bottom of the page. You are asked to provide the reason you are deleting this record.

Figure 4-18 Reason for cancelling: Use this to briefly explain why you need to cancel this record.

- Step 4** Enter your **Reason** to cancel, and then click the **Finish** button. The Successful Transaction page opens allowing you to return to **Main Menu** or **Repeat Task**.

Amending Records

You can amend a registered record. The process for doing so begins when you select the record you want to amend using the **Submit Amendment** option on your menu panel (See “How to submit an amendment” below). The amended record is then available for the state to review and either approve or deny/reject. If it is approved, then it becomes the issuable record. If it is denied/rejected, you can review the reason that it was not approved and correct it (See “How to resubmit an amendment” on page 4-21).

How to submit an amendment

- Step 1** Navigate to **Death → Modify → Submit Amendment**. The *Death Search Criteria* page opens so that you can search for the record that you want to amend.
- Step 2** Enter your search criteria and click the **Search** button. A search results page displays records that match the criteria you entered
- Step 3** Click the **double arrow** next to the record you want to amend. The *Record Details* page opens.
- Step 4** Click the **Continue** button at the bottom of any *Record Details* page. The selected record opens.

Tip: You cannot begin an amendment to a record if another amendment is already in process. In this case you will see an informative message. Click **Continue** to close the message.



- Step 5** Modify the record as needed, and then click the **Finish** button. The *Record Modify Confirm* page opens displaying a list of changes made to the record.

Field (DB Name)	Original Value	Changed Value	Remove Change
Black or African American (RACE2)	N	Y	Remove
(AMEND_HISTORY)	02/26/2025 -- 1 -- 2025 -- AFF -- MIDDLE NAME	02/26/2025 -- 1 -- 2025 -- AFF -- MIDDLE NAME 03/03/2025 -- AMENDED BY FUNERAL HOME	Remove

Some system columns will be changed. [Show system columns](#)

Make Another Change Continue Cancel Full Transaction

Step 6 Ensure that the change you made is listed, and then click **Continue**. You are asked to confirm your amendment submission.

I submit the changes I have made to the death record for approval by the state.

Please note: Amendment is not saved until you press Continue

Continue Cancel

Step 7 Click **Continue**. The *Successful Transaction Page* opens.

Successful Transaction

Your transaction has been saved successfully.

Record Details

Decedent's First Name	ROBIN
Decedent's Last Name	DIANNA
Date of death	02/26/2025
Record ID	12321769
State file number	202501-000029

Print Confirmation

Your actions have triggered the following documents to be printed.
Please select all documents you wish to print.

Death Certificate Proof Copy: ®

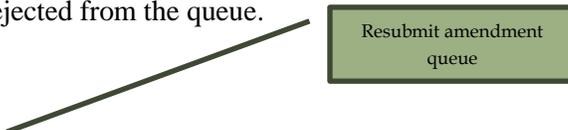
Print

Main Menu Repeat Task

Step 8 From here you can print a document from the **Print Confirmation** section. (You can also print from the Print option of the menu panel.) Click **Main Menu** to return to your Dashboard.

How to resubmit an amendment

If the state denies/rejects an amendment that you submitted, you will see it on your **Resubmit Amendment** queue. You can open the amendment and see why it was denied/rejected from the queue.



Details	Last Name	First Name	Date of Death	State Declined	Action
	FHSTARTED	CONCERTIFIER	02/07/2025	Yes	

Notice the State comments below the State File number.

Click the **double arrow** for the record on your **Resubmit Amendment** queue that you want to correct. This opens the *Record Details*.

Tip: You can also use the **Resubmit Amendment** option on the menu panel to find the rejected/denied record.

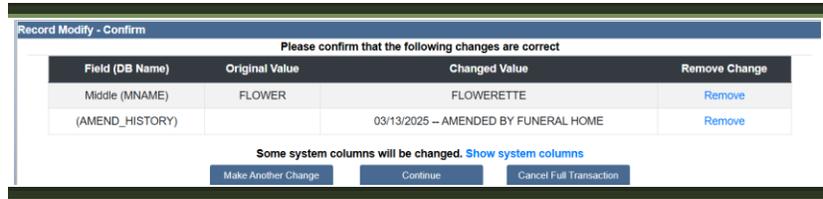
Step 2 Click **Continue** on any *Record Details* tab. The *Confirm Rescind - Confirm* page opens.

Step 3 The *Confirm Rescind - Confirm* page provides instructions on how to proceed. When you proceed to resubmit the amendment, you will need to make sure that you that you make all the changes needed that were rescinded, so you should make a note of the **comments** in the **Record Summary** section

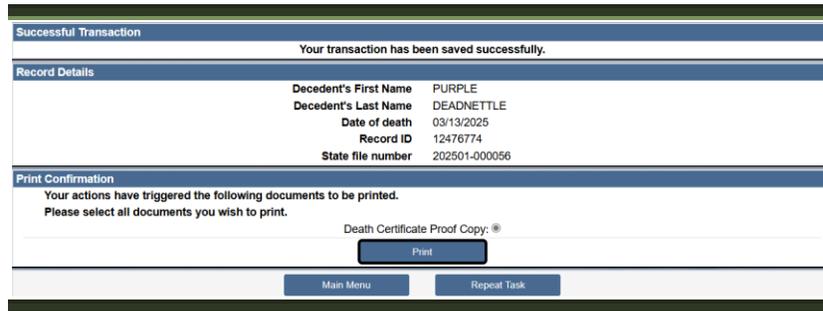
Step 4 Click **Continue**. A second confirmation window opens.

Step 5 Click **Continue** to open the record.

Step 6 Modify the record as needed, and then click the **Finish** button. The *Record Modify Confirm* page opens displaying a list of changes made to the record.



Step 7 Ensure that the change you made is listed, and then click **Continue**. The *Successful Transaction Page* opens.



Step 8 From here you can print a document from the **Print Confirmation** section. (You can also print from the Print option of the menu panel.) Click **Main Menu** to return to your **Dashboard**.

Chapter

5

Viewing & Retrieving Records

VERS

5 Viewing & Retrieving Records

In this chapter

You can invoke a search to find a record. For example, you may want to view the details of the record or print a document related to one of your records. This chapter introduces you to the **VERS** search feature. Specifically, this chapter contains the following topics:

5 VIEWING & RETRIEVING RECORDS	5-2
IN THIS CHAPTER.....	5-2
WORKING WITH SAVED RECORDS	5-3
<i>How to search for records</i>	5-3

Note: Not all functions and fields discussed in this chapter are available to all users.

Working with saved records

You may need to view or work with a record that has already been entered for a variety of reasons, depending on your user role, including the following:

- ❖ Printing documents
- ❖ Viewing record details
- ❖ Updating records

Before you can complete any of the above from a menu option you must first retrieve the record. Note that you can also update a record by selecting the record off of your unfinished record queue.

How to search for records

When you want to retrieve an existing record, you must first find and display it. You use a **VERS** search page to help find the record. The information you enter on the *Search* page is referred to as the search criteria.

If the search page includes a name and you use a common last name, such as Smith, that may return many records, you should also enter additional search criteria such as the date of the event to narrow the search.

To search for a record:

- Step 1** Navigate to the desired menu point (e.g., **Death → Print, Maintain, Update, Search**, etc.) If necessary, select the desired option, such as Proof Copy. The corresponding *Search* page appears.



Record Identifiers State file number <input type="text"/> Death record number <input type="text"/>		Decedent's Sex Sex: Select <input type="text"/>	
Decedent's Name First <input type="text"/> Middle <input type="text"/> Last <input type="text"/> <input type="checkbox"/> Soundex on last name		Decedent's Social Security Number SSN <input type="text"/>	
Date of Death Date of death (mm/dd/yyyy) <input type="text"/> From <input type="text"/> To <input type="text"/>		Date of Birth Date of birth <input type="text"/>	
Month and Year of Death Month: Select <input type="text"/> Year <input type="text"/>		Location of Death Country of death: UNITED STATES <input type="text"/> States: WASHINGTON <input type="text"/> County: Select <input type="text"/> City list: Select <input type="text"/> City <input type="text"/>	
		Spouse's Name First <input type="text"/> Middle <input type="text"/> Last <input type="text"/>	
Special Criteria <input type="checkbox"/> Check to find records with Pending manner of death			

Figure 5-1 Sample Search Page (Death): This allows you to enter information to help find a specific record.

- Step 2** Enter additional search criteria to help find the record. Most types of searches (updating, printing, etc.) have their own set of fields and search criteria requirements that must be used for the search.
- Step 3** Click the **Search** button. If you need to add information a message will appear when you click **Search**. If you see such a message, add/modify your criteria as specified and click the **Search** button

again. The screen shot below shows a list of records that matched the search criteria that was entered.



Figure 5-2 Sample Search Results: Find your record and then click its Details link to continue your work.

Tip: If no record appears in the list or if you do not see the record you want, you can click **Cancel** to return to the *Search* page where you can refine your search criteria.

Step 4

Click the **Details** link in the right-hand column for a specific record to view record details and confirm that you have selected the correct one. The **Record Details** page appears.

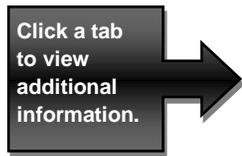


Figure 5-3 Sample Record Details page (first tab): Use the tabs to review the record details.

Step 5

If you determine that this is the record you want, click the **Continue** button at the bottom of any page (or press your **Enter** key). The corresponding procedure executes (e.g., the record opens so that you can add or edit information or the print process begins or you return to the main menu).

Notes: If you clicked the **Search** menu option, you will be able to view the record details. When you click the **Continue** button, there is no opportunity to modify the record.

If you determine that this is not the record you want or if you do not want to continue, click the **Cancel** button to return to the *Records List* page.

Chapter

6

Printing

VERS

6 Printing

In this chapter

This chapter provides information about printing documents from the **Print** menu option.

6 PRINTING	6-2
IN THIS CHAPTER.....	6-2
OVERVIEW	6-3
HOW TO PRINT FROM YOUR BROWSER.....	6-3
HOW TO PRINT VIA ADOBE ACROBAT	6-3
YOUR PRINT MENU.....	6-5
<i>How to print record-specific documents</i>	6-5
<i>How to print blank forms</i>	6-5

Note: Not all functions and fields discussed in this chapter are available to all users.

Overview

Most documents you can print are generated as PDFs. Newer versions of most browsers (e.g., Firefox, Edge, and Chrome) have their own PDF readers. If you are using one of these browsers, your document will open in a new tab of your browser. If this does not happen, it will open in Adobe Acrobat, which must be installed in addition to your browser.

How to print from your browser

If a new tab opens in your browser when you select to generate a document, you can print it directly from the tab that is showing the document. Click on the **printer icon** or press **Ctrl + P** on your keyboard to open your print dialog box and print to the selected printer.

How to print via Adobe Acrobat

Anytime you begin a print job from a browser that does not have its own PDF reader, you should see the document displayed in the Acrobat window. Once displayed, you can print it.

Note: If you encounter print problems with Adobe Reader, please check the *Troubleshooting* section in the “Technical Support” chapter or contact your help desk.

To print via Acrobat:

- Step 1** When you begin a print process that uses Adobe Acrobat, the **VERS** application may display a *File Download* dialog box. If the file (i.e., document) is displayed in Acrobat without first displaying the *File Download* dialog box, skip to Step 3.

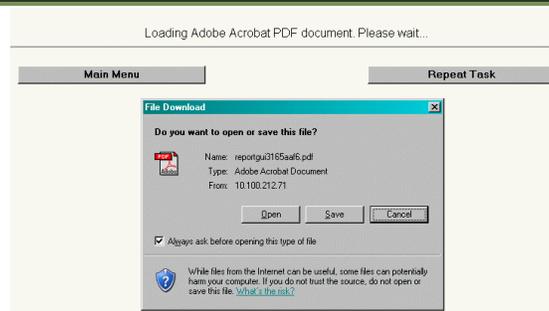


Figure 6-1 File Download Dialog Box: It may take a moment for the document to load. When the File Download dialog box opens, you can open the file, save the file or cancel the process from this box.

- Step 2** To allow you to view the file and then print it click the **Open** button. The generated file is displayed in Acrobat.
- Step 3** Once the document is displayed select **File → Print** from the Adobe Acrobat menu bar or the **Printer icon** on the toolbar. The *Print* dialog box appears.

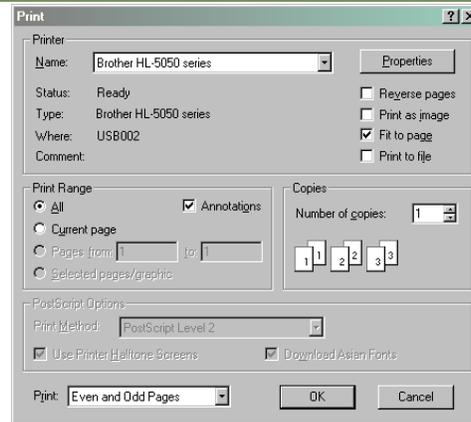


Figure 6-2 Sample Adobe Print Options: From here you can specify your print settings.

- Step 4** Specify your print/printer information in the *Print* dialog box, and then click the **OK** button. The document prints to the selected printer.
- Step 5** Close Adobe Acrobat.

Notes: Every printer is different, so if you must feed the paper back into the printer to print double sided, make sure the paper is loaded correctly.

Do not close Adobe Acrobat until you have a good print.

When closing Adobe Acrobat, you should remain within the **VERS** system. If this is not the case and you are taken to the log on page, contact your help desk to discuss your PC settings.

Your print menu

Some types of documents may be printed when saving a record (e.g. HIPPA Proof Copy). These documents may also be printed using the **Print** menu option in case there was a printing problem when printing during the save process. Some documents associated with a specific record can only be printed from the Print menu. Because these documents are record-specific you must find the record. See “How to print record-specific documents”.

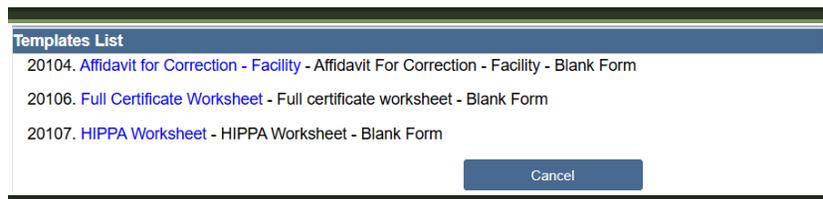
You also have the option to print blank forms, such as the Full certificate worksheet. no need to find a specific record. These forms can be completed manually as explained in “How to print blank forms”.

How to print record-specific documents

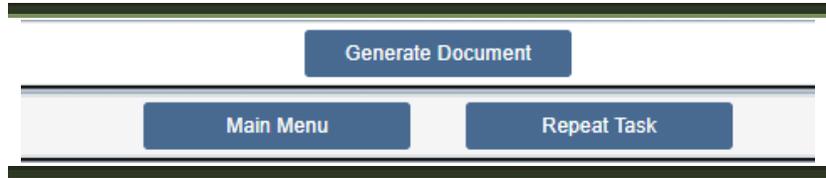
- Step 1** From the Main menu, click **Death → Print → <name of document>**. The *Search* page appears.
- Step 2** Use the *Search* page to find the desired record. See the chapter called “Viewing & Retrieving Records” if you need more information.
- Step 3** Click **Details** for the record you want to print.
- Step 4** Once the correct record appears on the *Record Detail* page, click the **Continue** button at the bottom of the page
- Step 5** Click **Generate Document**. The document opens on a new tab in your browser or is sent to Adobe Acrobat from which you can print it.
- Step 6** After you print the document, click **Main Menu** or **Repeat Task** depending on what you want to do next.

How to print blank forms

- Step 1** From the Main menu, click **Death → Print → Blank Forms** to see a list of available forms such as shown below.



- Step 2** Click on the form you want to print.



- Step 3** Click **Generate Document**. The blank form opens on a new tab in your browser or is sent to Adobe Acrobat from which you can print it.
- Step 4** After you print the document, click **Main Menu** or **Repeat Task** depending on what you want to do next.