DAVE ™
One Integrated System for All Your Vital Record Business Needs

Database Application for Vital Events
A LexisNexis© Product

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Maine Death Module Funeral Home User Training Exercises

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Section 1: General DAVE™ Navigation

Exercise 1.1 – Logging Into DAVE™

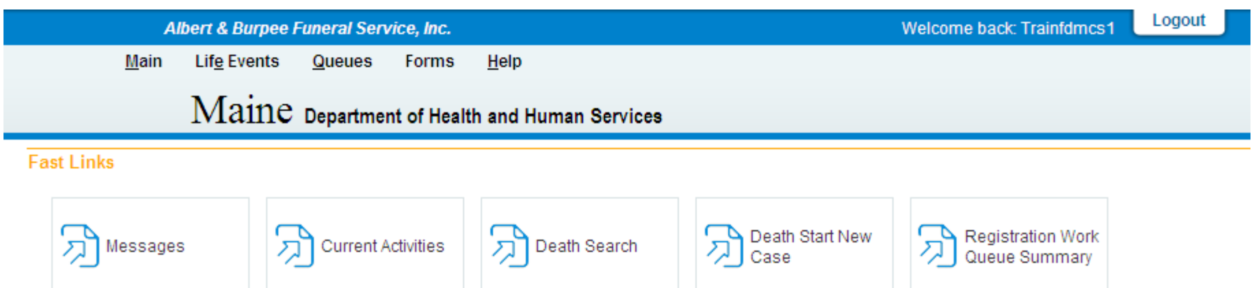
Skill Learned: How to log into the **DAVE™** application.

1. Double click the **DAVE™** icon on your desktop or select **DAVE™** from the Favorites Bookmark) from within your web-browser.
2. Enter your **User Name** and **Password**.
3. Click the **Login** button.

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

5. Click on the office selection, to finish logging into the **DAVE™** application.

You should now be logged into the **DAVE™** application **Home** page with the **Current Activities** and **Messages** frames displayed.



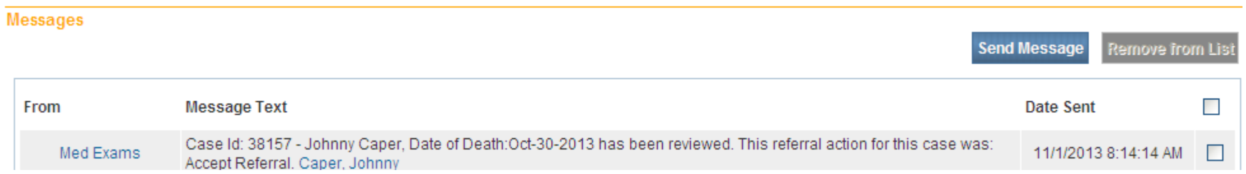
Exercise 1.2 – Messages

Skill Learned: Basic Navigation within the **Messages** window.

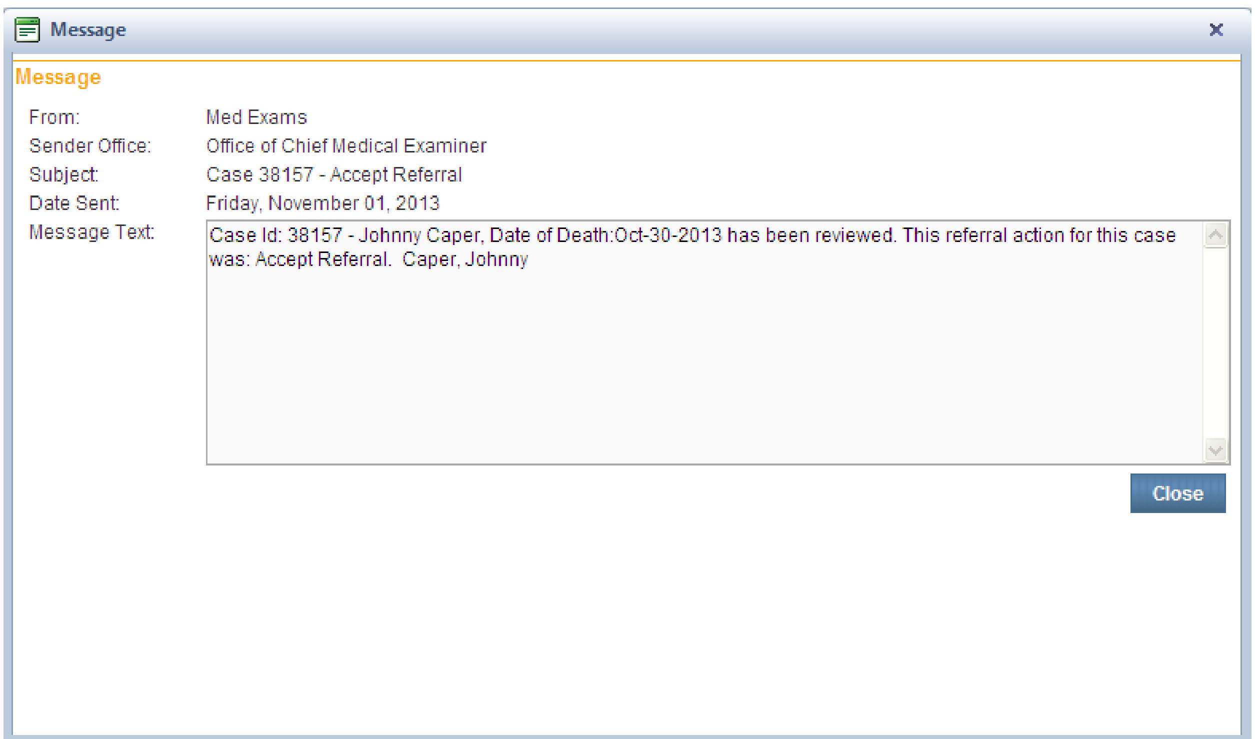
The **Messages** window is one of the fast links that display upon logging into **DAVE™**. Initially, this window is minimized. Click on the **Messages** fast link to open the **Messages** window. Some **Messages** are text messages sent from one system user to another, while others are automatically system generated during the registration process.

The **Messages** window is a grid 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 the underlined link in the **From** column. The **Message Text** column displays all or a portion of the message that was sent, depending on message length. **Date Sent** displays the date and time the message was sent. Notice that the **Remove from List** button is initially grayed out or disabled.

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



2. The **Message** window is a popup that appears on top of the **DAVE™** page. After reading the message, click the **Close** button.



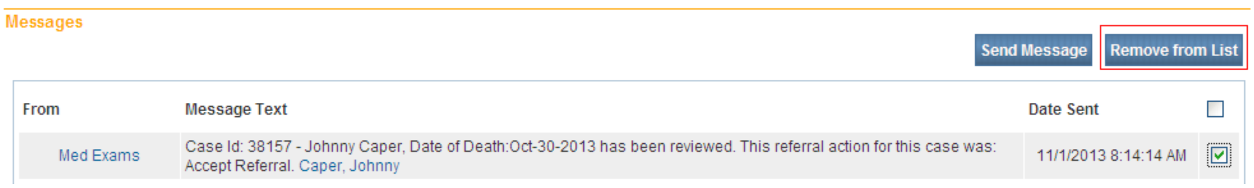
3. Place a checkmark in the checkbox next to the **Date Sent** column header.

4. Notice that the **Remove from List** button is now active. Clicking the **Remove from List** button with the **Date Sent** checkbox selected will delete all selected messages from the list.

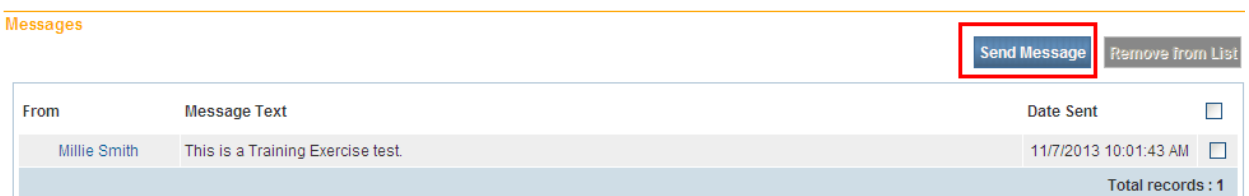
> **Note: Deleted messages cannot be restored. Do not delete messages unless you are sure that you will not need them.**

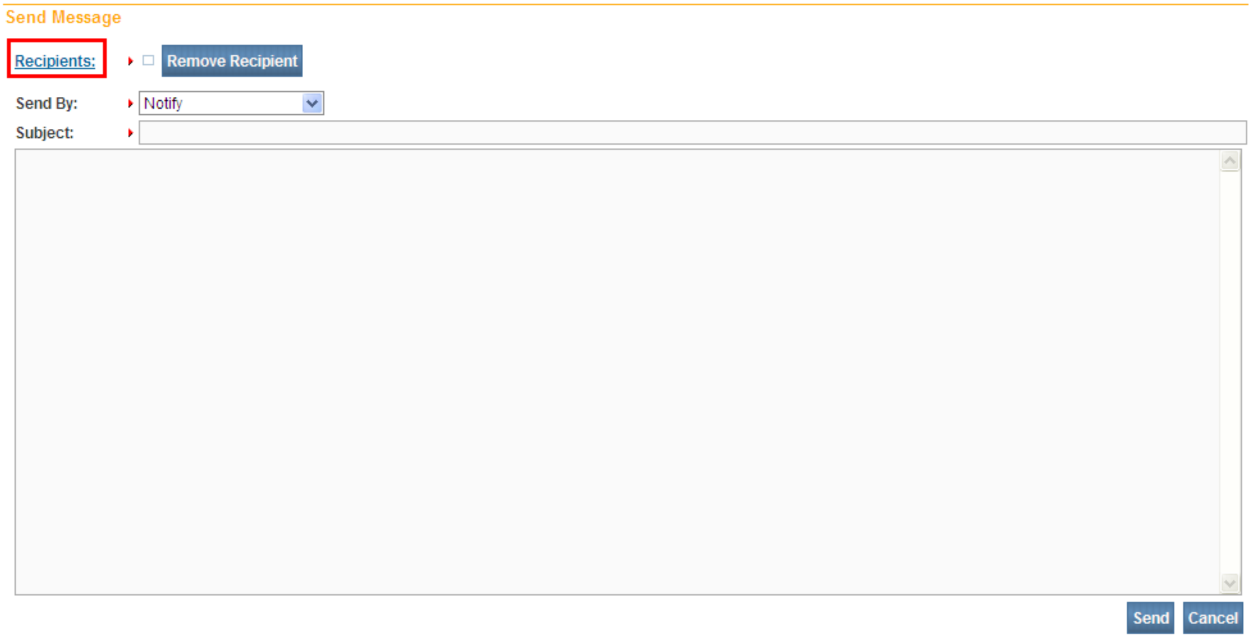
5. Remove the checkmark from the checkbox next to the **Date Sent** column header and place a checkmark in any of the boxes next to a single message.

6. Click the **Remove from List** button to remove a single message from the list.

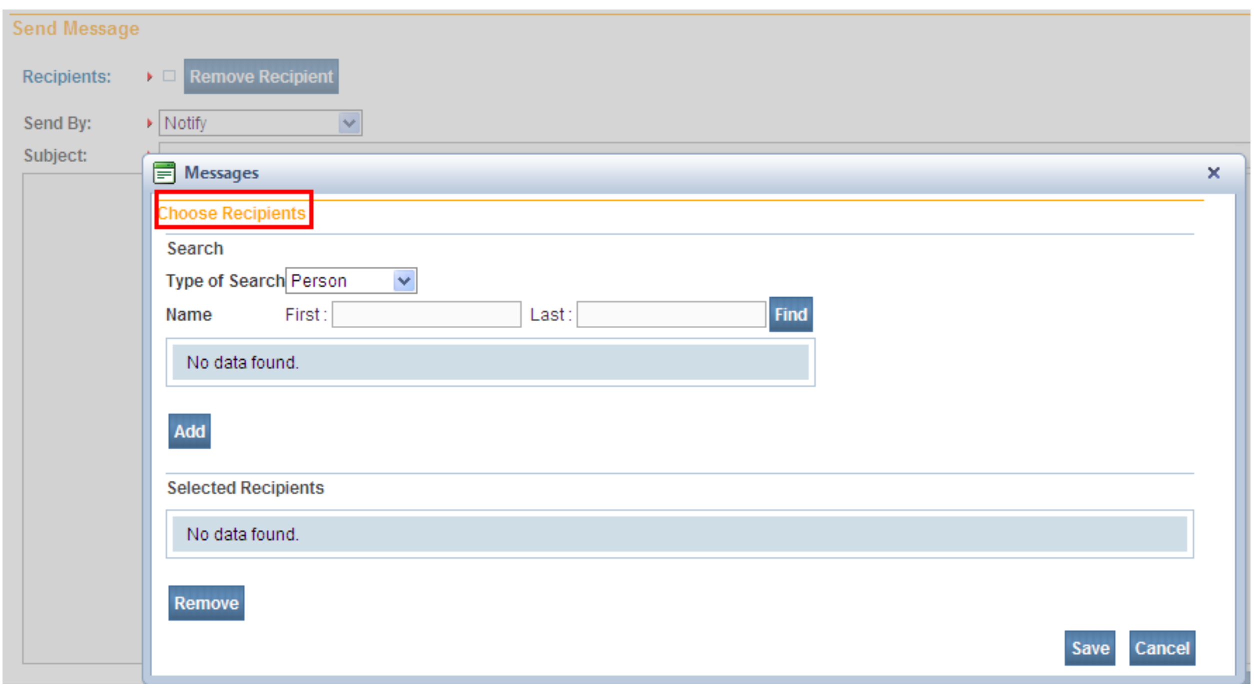


7. To create a message select the **Send Message** button. The Send Message box will expand.



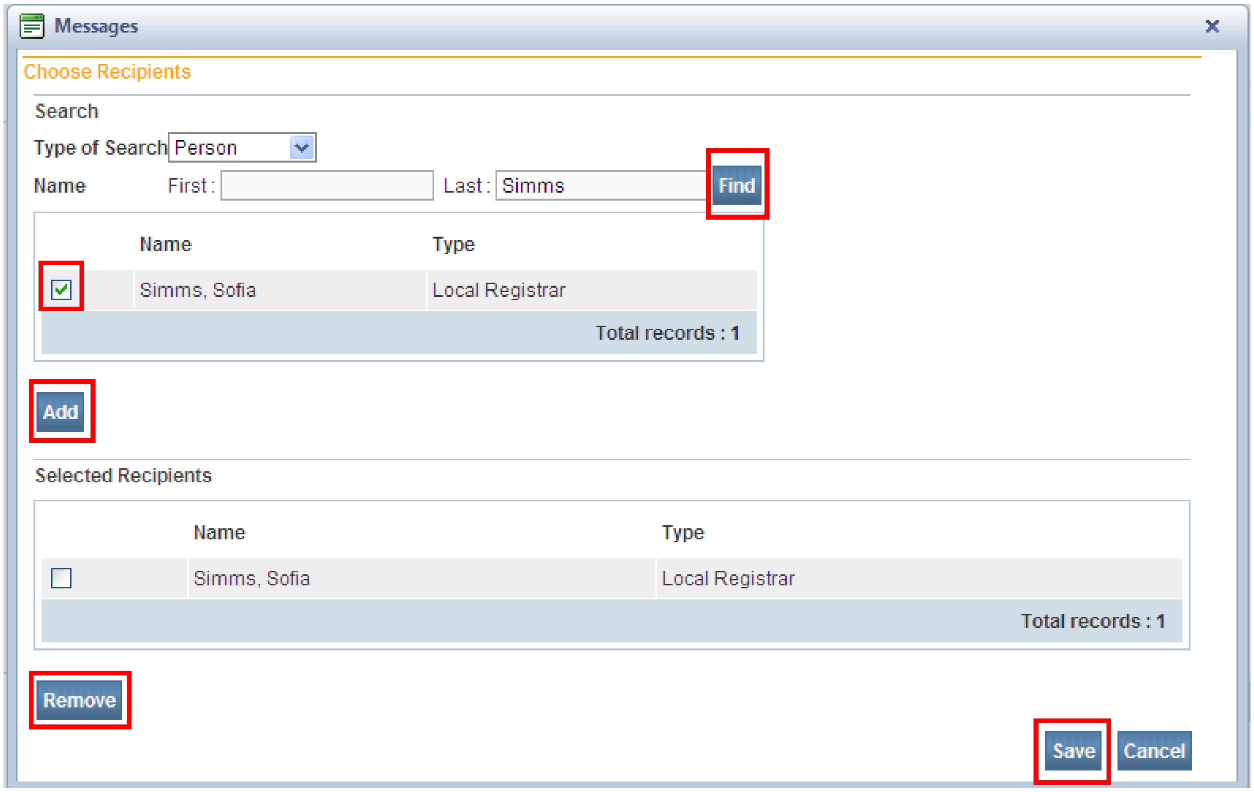


8. Click the **Recipients** link. The Choose Recipient box will open. The Type of Search defaults to “Person”. A search can be made on a “Person” or an “Organization”.

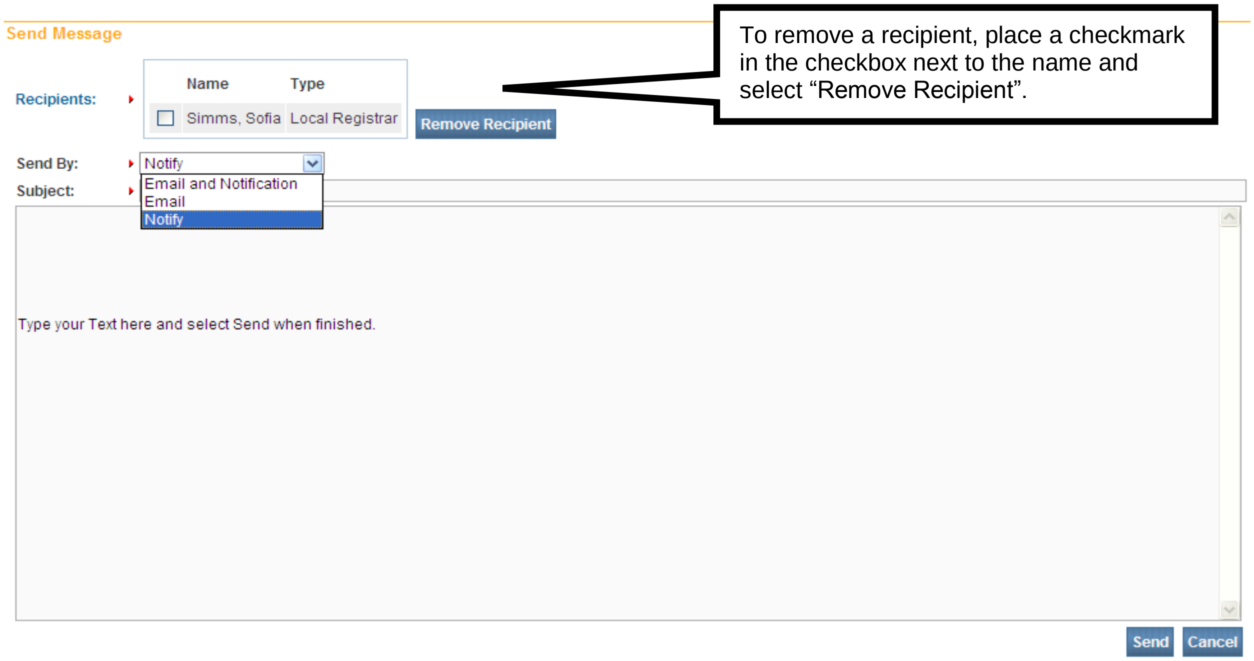


9. Type in the first and last name of the person you wish to send a message to.
10. Select FIND.
11. Place a checkmark in the checkbox next to the name of the person you wish to send a message.

12. Click the "**Add**" button.



13. Click SAVE. The name will appear near the "**Recipients**" link.



14. To remove a name, place a checkmark in the checkbox next to the name in the **Selected Recipients** section, and click on the **Remove Recipient** button, and click SAVE. The Send Message screen will show you the recipients selected.

15. To send the message, select the Send By dropdown to indicate if the message should be sent using both Email and Notification, Email only or Notify only.

    Selecting Notification and/or Notify will send an “internal” message.

16. Type the message in the message box.

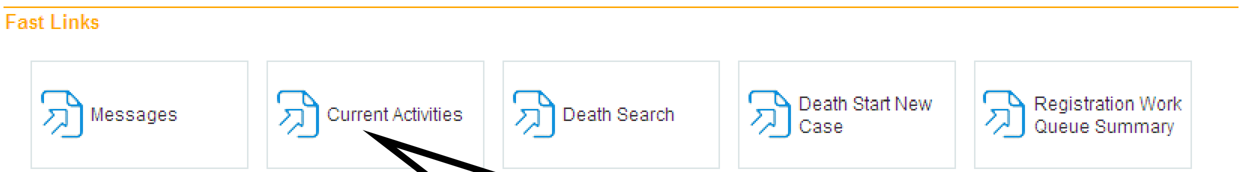
17. Select the Send button.

Exercise 1.3 – Current Activities

Skill Learned: Basic navigation within the **Current Activities** pane.

The **Current Activities** window is one of the fast links that display upon logging into **DAVE™**. Initially, this window is minimized.

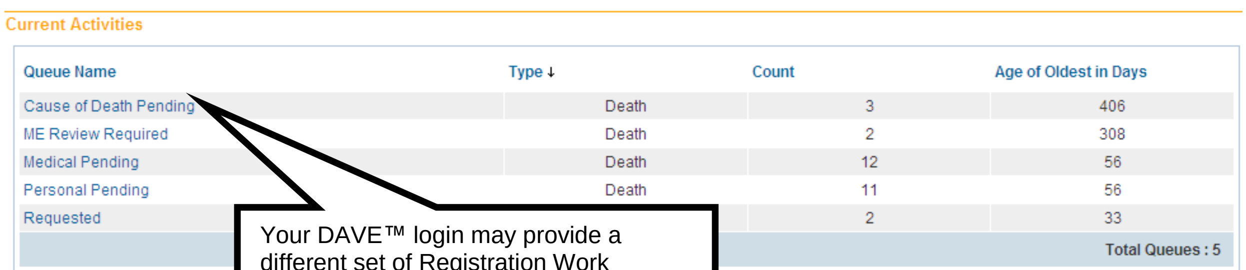
1. Select the **Current Activities** fast link to open the **Current Activities** window.



Click on the Current Activities fast link to open the Current Activities window.

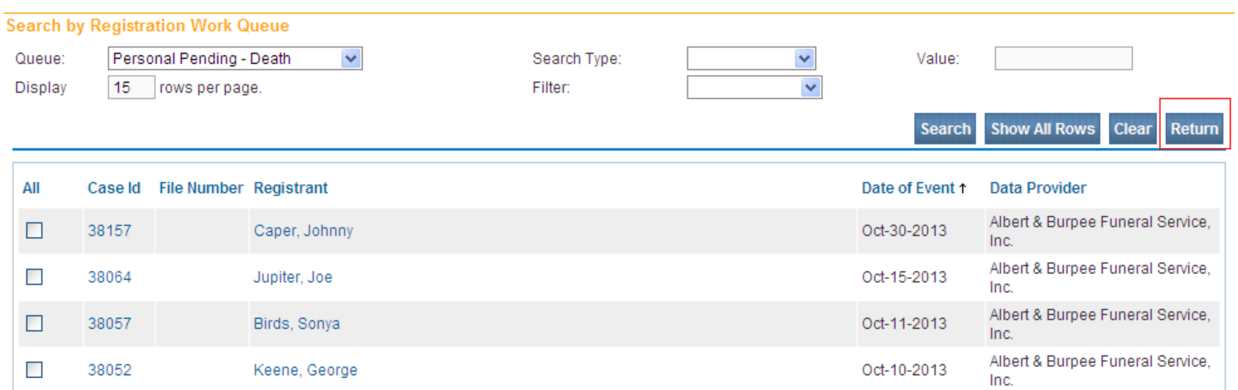
The **Current Activities** window displays a listing of the **Queues** that contain records requiring immediate attention. (See Work Queues for more information). In the example below, there are 11 records in the Personal Pending queue needing attention. The oldest record in that queue is 56 days old.

2. Click the Personal Pending link to open the **Personal Pending Work Queue** page allowing access to the records in the queue.



Your DAVE™ login may provide a different set of Registration Work Queues.

3. Review the various fields on the **Personal Pending Work Queue**. We will look at how to access and edit records in the **DAVE™** application elsewhere in these exercises.



4. Click the **Return** button to close this page and return to the **Home** page.

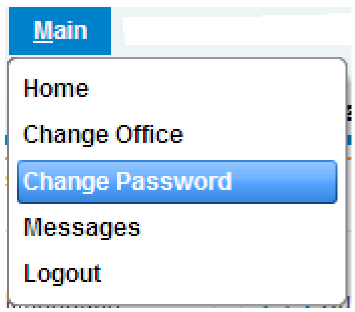
Exercise 1.4 – Change/Forgot Password

Skill Learned: How to change your **DAVE™** system password.

The EDRS Application Support Specialist will provide you with a password that will enable you to log into **DAVE™**. This is a temporary password that must be changed when you login for the first time.

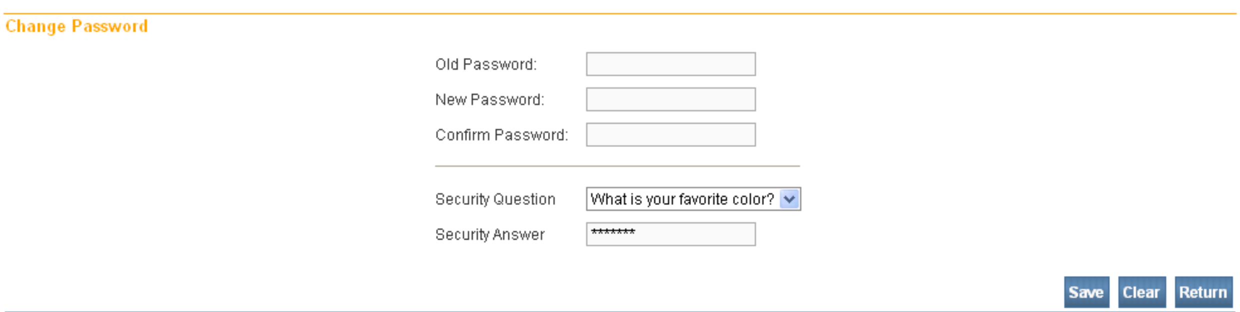
To change your password:

1. From the **Home** page, select **Main menu -> Change Password**.



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

3. Enter your new password into the **New Password** text entry box. Passwords must be at least 8 characters in length and should contain at least one number, one uppercase and one lowercase character.



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

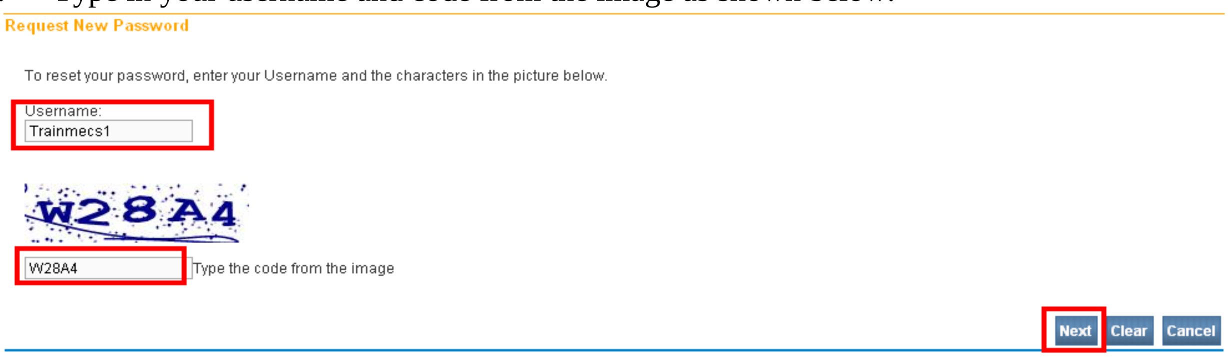
5. Answer the Security Question and Security Answer.

6. Click the **Save** button.

Forgot your Password

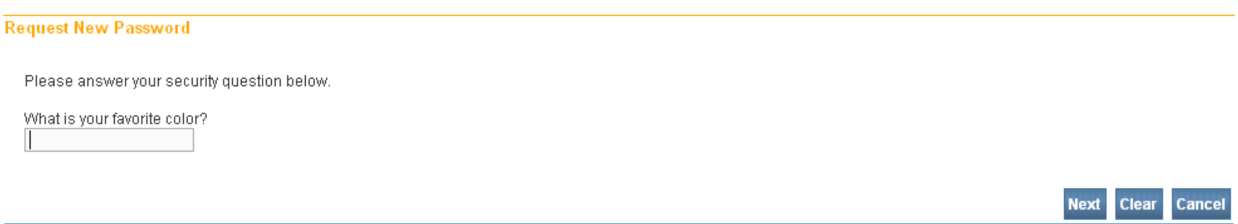
1. At the Login screen, type in your username.
2. Click the “Forgot your password?” link.

3. Type in your username and code from the image as shown below.

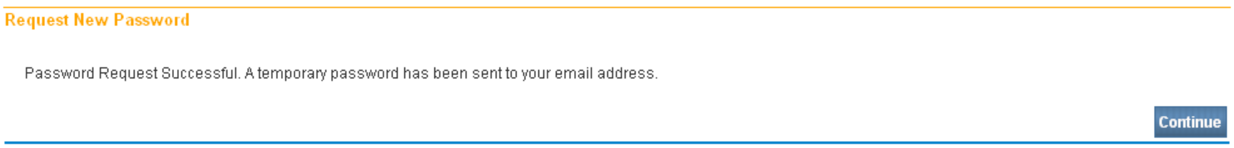


4. Select the Next button.

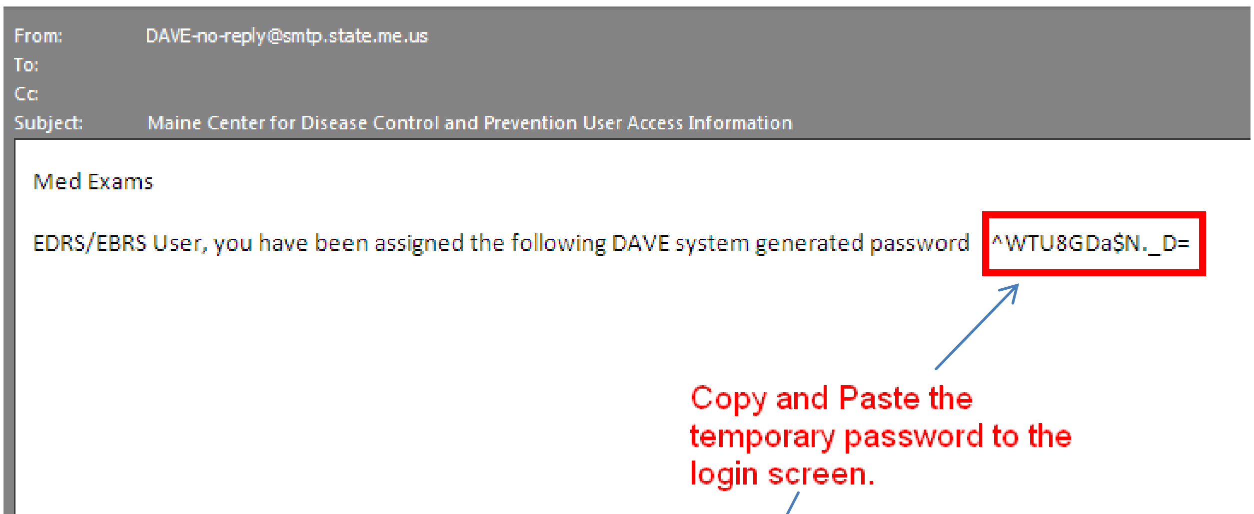
5. At “Please answer your security question below”, type in the answer to the security question you completed earlier in Step 5 above of the “Change Your Password” section.



6. Select the Next button.
7. A message will appear stating a temporary password has been sent to your email address.



8. Select Continue.
9. You will be returned to the Login screen.
10. Retrieve the automated email message with the temporary password.

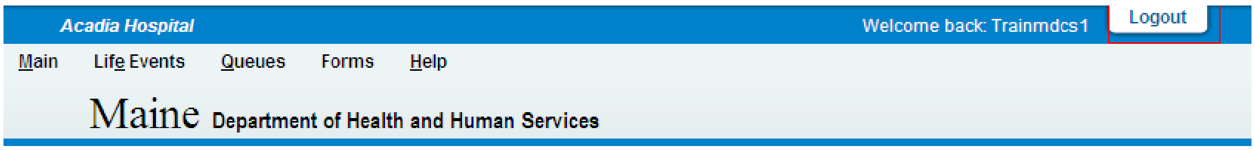


11. Copy and paste (or type in) the temporary password onto your login screen.

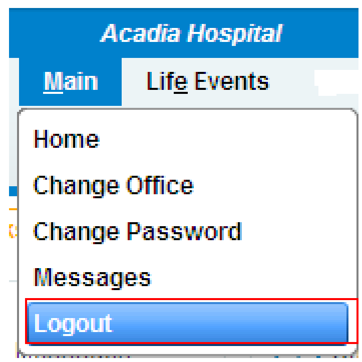
Exercise 1.5 – Logging out of DAVE™

Skill Learned: How to Log out of the **DAVE™** application.

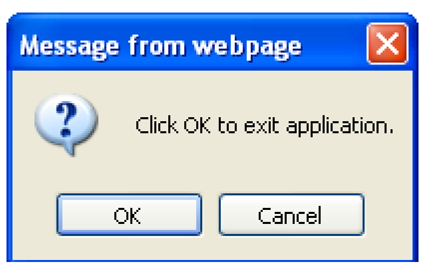
1. Locate and select the **Logout** button in the upper right corner of the Home **DAVE™** page. Upon selection of the upper-right hand corner **Logout** button, **DAVE™** will return you to the login screen.



2. Another way to Logout from **DAVE™** is to select **Logout** from the **Main Menu**.



3. **DAVE™** will prompt you to make sure you intend to exit the system. Click **OK** to logout of **DAVE™** or **Cancel** to remain in the application.



4. From the **DAVE™** login window shown below you can enter your username and password to log back in.

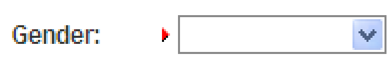
Section 2: Page Controls and Features

Exercise 2.1 – Dropdown Lists

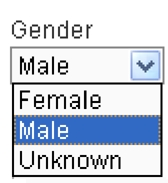
Skill Learned: How to navigate through **DAVE™** using the various fields and icons.

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

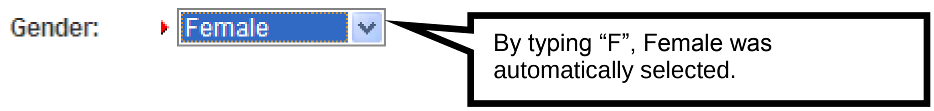
1. One of the first dropdown lists you are likely to encounter is the **Gender** dropdown list on the **Start/Edit New Case** page. To view all options in the list, click the down-arrow on the right side of the field.



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



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



Note: If more than one word in the list starts with the same letter, typing that letter again will scroll through the list for you.

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

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

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

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

Exercise 2.2 – Standard Date Format

Skill Learned: How to properly enter dates into the **DAVE™** system. While processing death registrations, you will frequently be inputting dates. **DAVE™** allows you much flexibility in using several different date formats.

1. Practice entering dates using the various allowable formats shown below. Note the date format displayed is always the same regardless of the format entered.

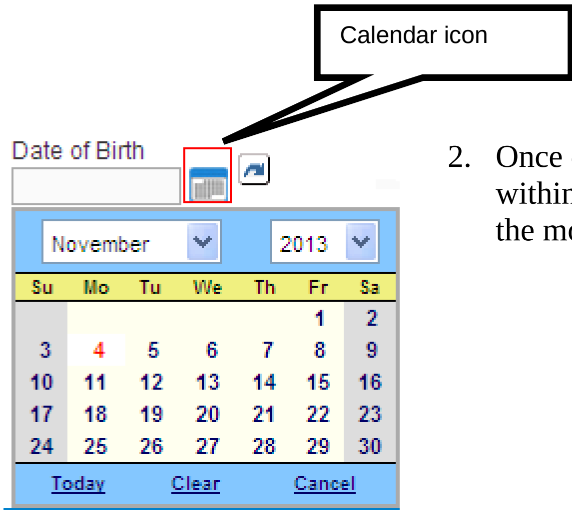
	If user enters:	**System will display:**
MM-DD-YYYY:	Date of Death: 06-09-2004	Date of Death: JUN-09-2004
MM/DD/YYYY:	Date of Death: 06/09/2004	Date of Death: JUN-09-2004
MMDDYYYY:	Date of Death: 06092004	Date of Death: JUN-09-2004
MONDDYYYY:	Date of Death: jun092004	Date of Death: JUN-09-2004

Note: In all cases a 2 digit must be entered for the Month and Day, and 4 digits for Year. The only exception is the MonDDYYYY format that allows the entry of a 3-letter abbreviation for the Month. The MonDDYYYY format also supports Mon/DD/YYYY and Mon-DD-YYYY formats.

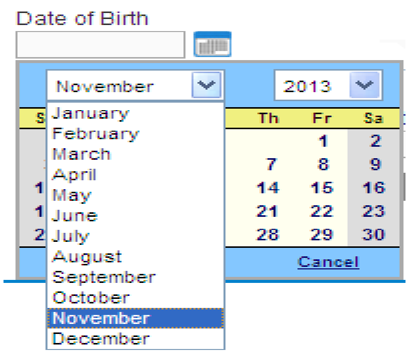
Exercise 2.3 – Using Calendars

Skill Learned: How to use the **Calendar** control to input dates without entering them in manually.

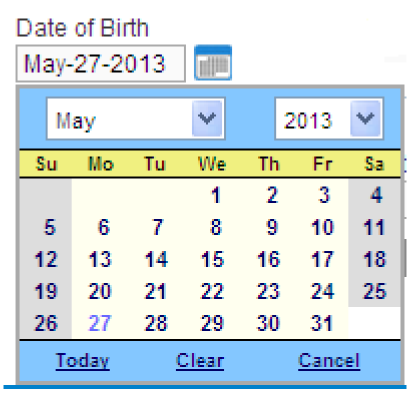
1. In addition to manual date entry, you can also click the **Calendar icon** next to a date entry box to bring up a **Calendar** control.



2. Once displayed, there are two drop-down lists within the **Calendar** control; one for selecting the month and the other for selecting the year.



3. By default, the current Month, Day, and Year are displayed. Clicking the down arrow next to the month (in this example, November), will open the full list. Or, type the first letter of a month for quick select or the up and down arrows on the keyboard can be used to scroll to the desired selection.



4. Selection of any day of any month will populate that date in the corresponding **Date Entry** text box in the MON-DD-YYYY format. For example, using "May" and "2013" in the dropdown lists and clicking on "27" will display the date format:

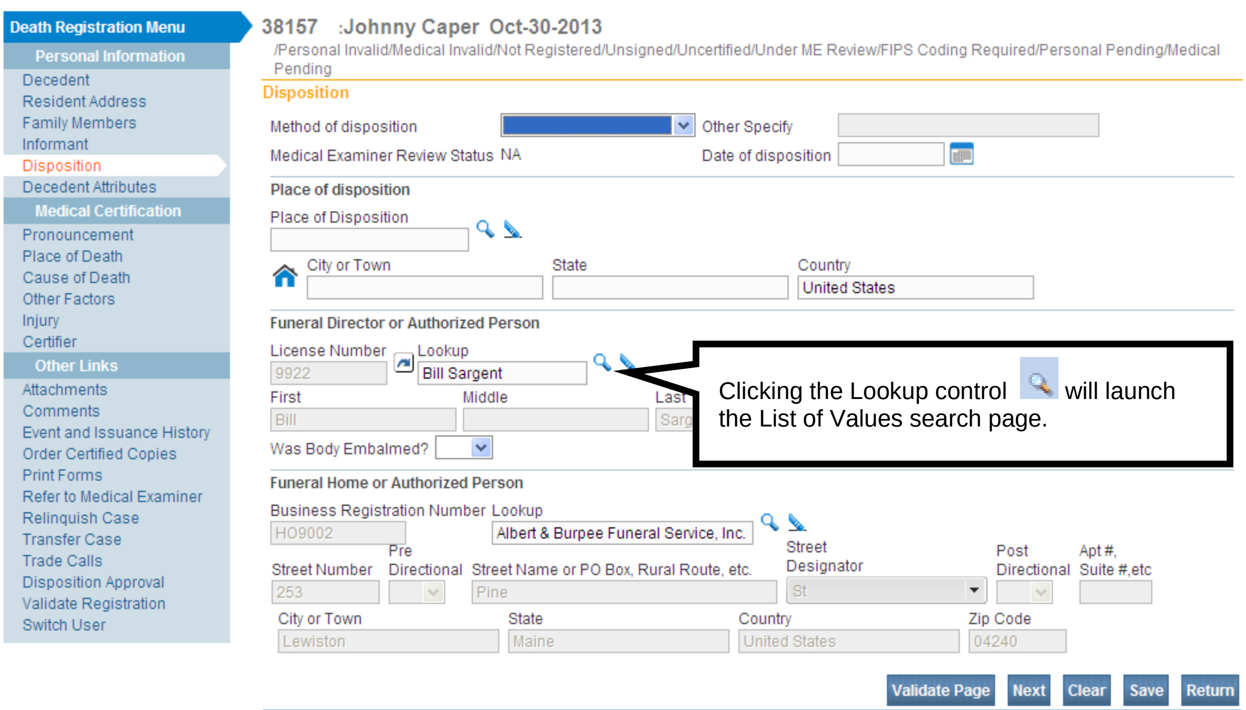
.

Date Entry Shortcut: Place the cursor inside a date field and press the F12 button on your computer keyboard. Pressing F12 will automatically populate the date field with the current system date.

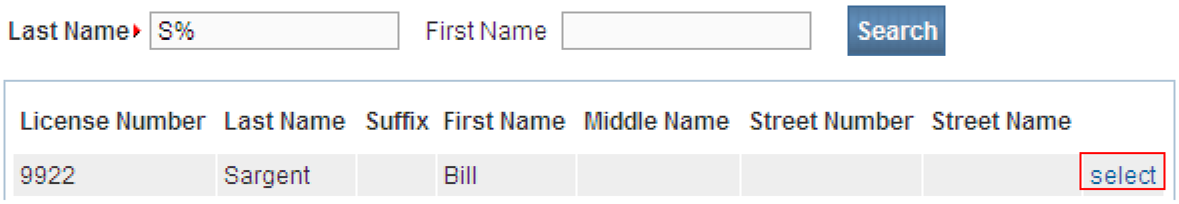
Exercise 2.4 – Lookup Controls

Skill Learned: How to use **Lookup Controls** that launch **Lists of Values** that display a grid of selectable data.

1. On the **Disposition** page shown in the example below, locate the **Lookup** button. The **Lookup** control appears onscreen as a magnifying lens ( ). Click the **Lookup** control to launch the **Name** search field.

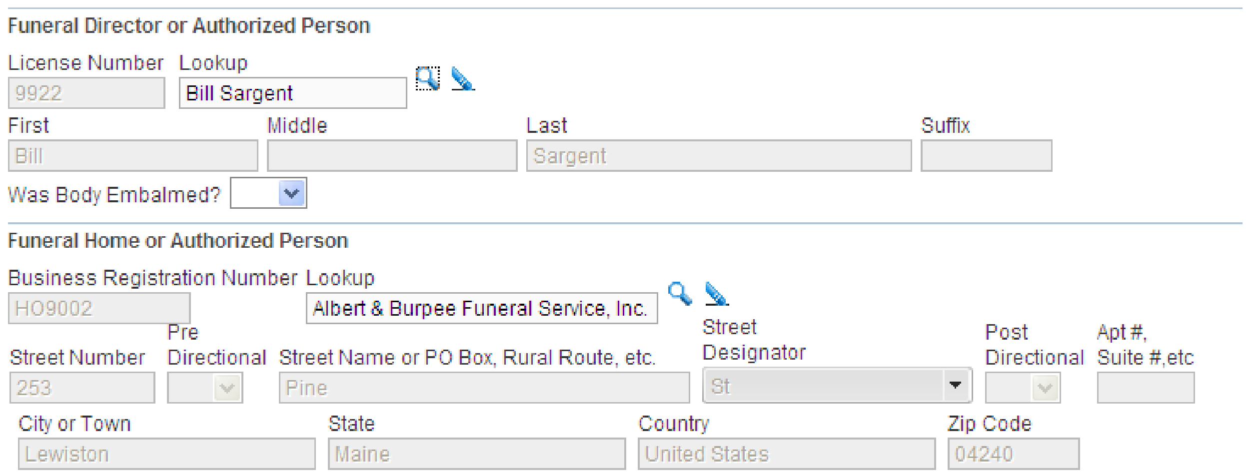


2. If the exact name of the Funeral Director is known, enter the first and last name and click the **Search** button. The **Last Name** field also supports Wild Card (%) searches. Entering the letter “S” with a trailing percent sign (**%**) character and clicking **Search** will return a list of all potentially matching funeral practitioners with last names that begin with the letter “S.” Note that **First Name** is not a required field.



3. The **List of Values** (LOV) control above lists all of the funeral practitioners in the system beginning with the letter "S". Click the Select link next to any corresponding name to auto-populate the funeral practitioner's name and address fields on the **Disposition** page.

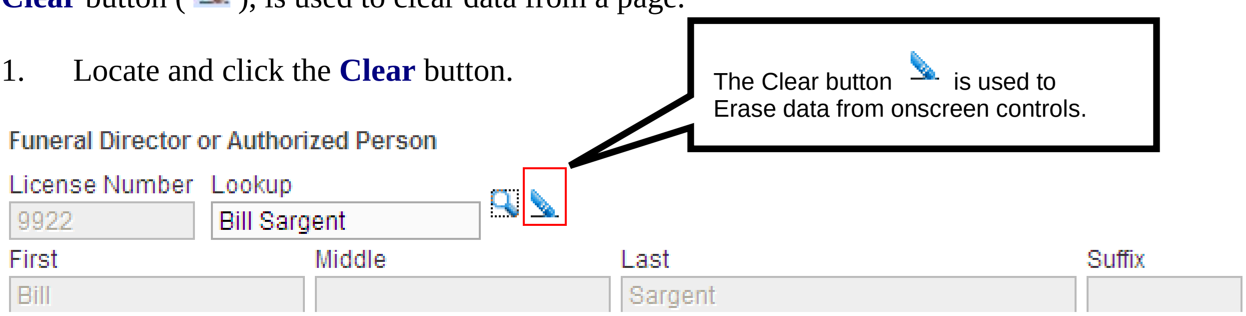
4. The **Funeral Director** tab is now complete.



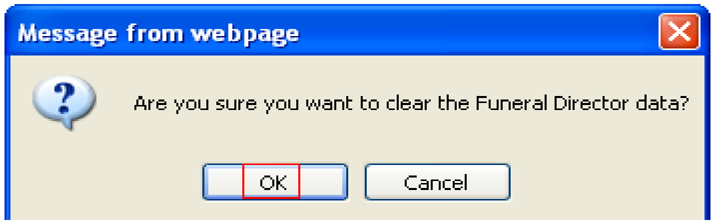
Exercise 2.5 – Clear Data Controls

Skill Learned: In the previous exercise, we saw how to use the **Lookup** control ( ) to quickly locate a funeral practitioner and enter that funeral practitioner's data into a record. The **Clear** button ( ), is used to clear data from a page.

1. Locate and click the **Clear** button.



2. **DAVE™** displays a warning message. Select **OK** to clear the facility data or **Cancel** to keep the data as displayed.



3. Selecting **OK** above will clear the Funeral Director name data.

Section 3: Record Validation

Exercise 3.1 – Status Bar

Skill Learned: How to use the **Status Bar** to help you track 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.

DAVE™ provides work flow and data quality management through the assignment of statuses. The death registration process consists of several sub-processes that are often completed by different users. In order to track these steps **DAVE™** assigns one or more statuses to the record when an action is performed (e.g., the **Validate Page** button is clicked) or an event occurs (e.g., a validation rule fails).

The initial status assigned to a new electronic death record is **/New Event/New Event/Not Registered/NA/NA/NA**. The goal of all parties in the registration process is to obtain a 'perfect' status. A perfect status indicates the highest data quality and completion of all steps in the registration process (e.g. **Personal Valid/ Medical Valid/Registered**). 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 with a **Personal Valid with exceptions / Medical Valid with exceptions / Registered** status or any combination of valid and valid with exceptions.

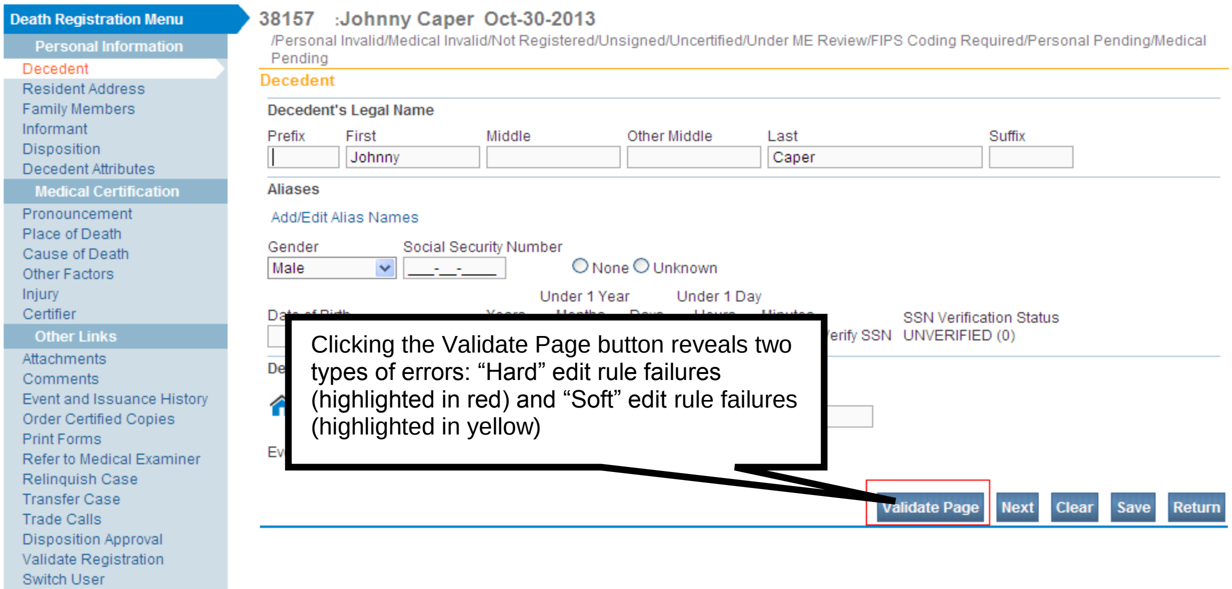
1. The **Status Bar** is viewable from any of the **Death Registration Menu** data entry pages. Simply locate the bar at the top of the page that displays the case number, registrant name, and date of death.

38157 :Johnny Caper Oct-30-2013
/Personal Invalid/Medical Invalid/Not Registered/Unsigned/Uncertified/Under ME Review/FIPS Coding Required/Personal Pending/Medical Pending

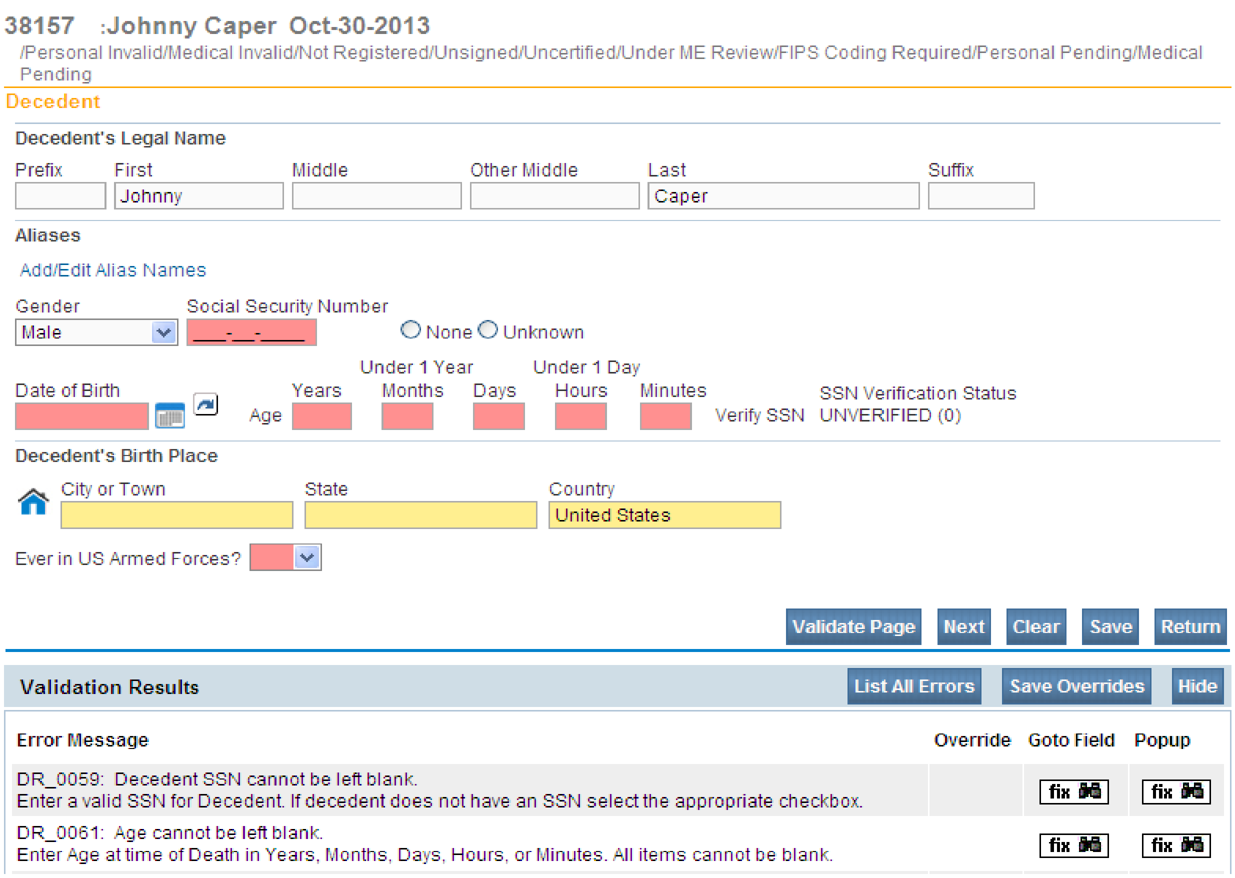
Exercise 3.2 – Record Validation and Error Correction

Skill Learned: How to validate death records and prepare them for registration.

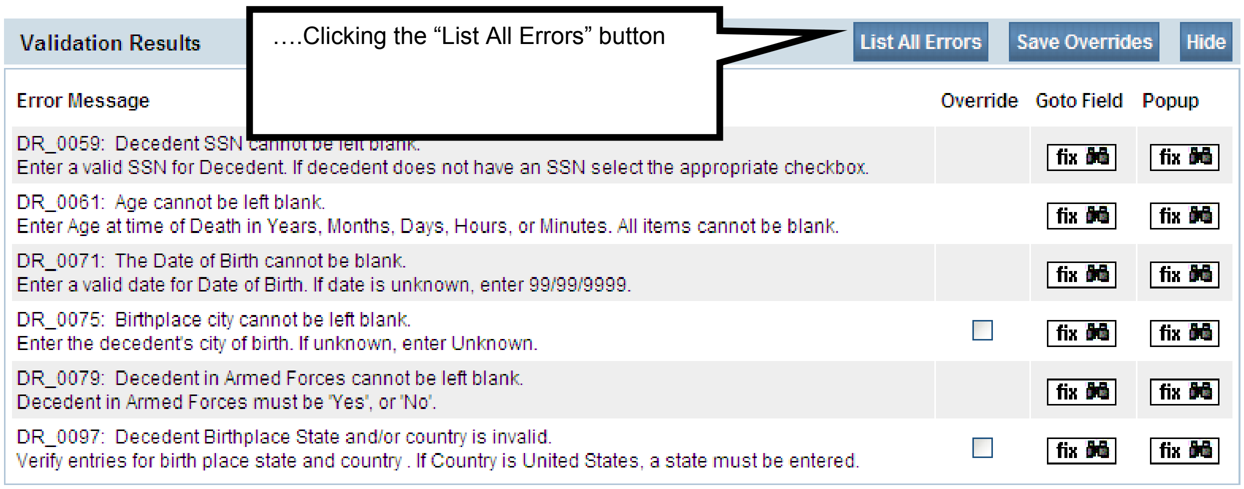
1. Click the **Validate Page** button to validate the registration data entered into the system.



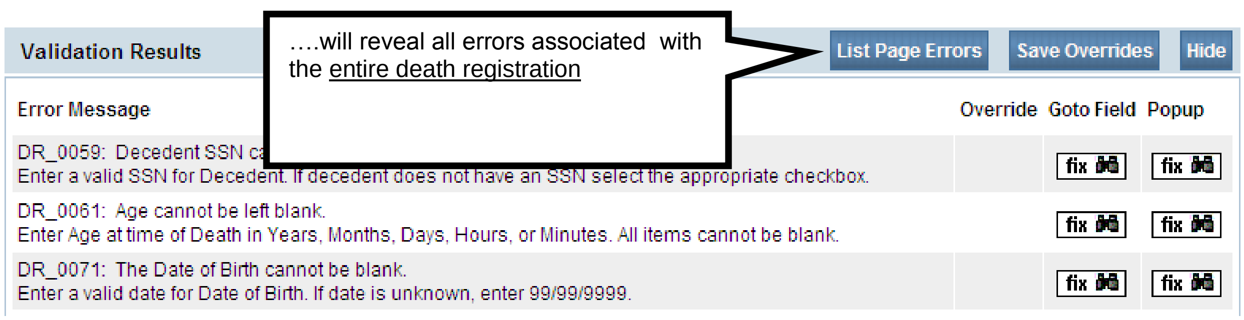
2. When you click the **Validate Page** button, the **Validation Results** frame will list all of the errors associated with that page.



3. Initially, the **Validation Results** frame will only display those errors associated with the current registration page. All of the errors in the example below are related to the **Decedent** page. However, if you then click the **List All Errors** button…

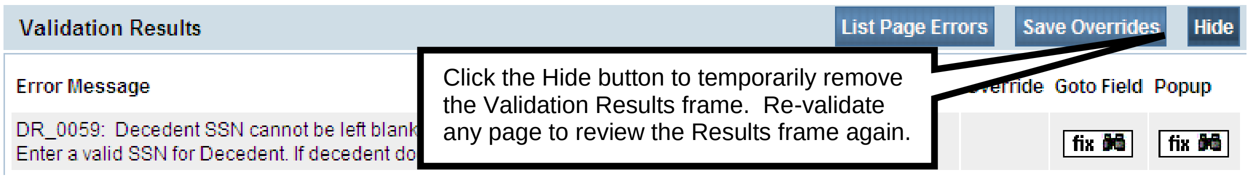


…the **Validation Result** frame will refresh and display all of the errors associated with the current registration.



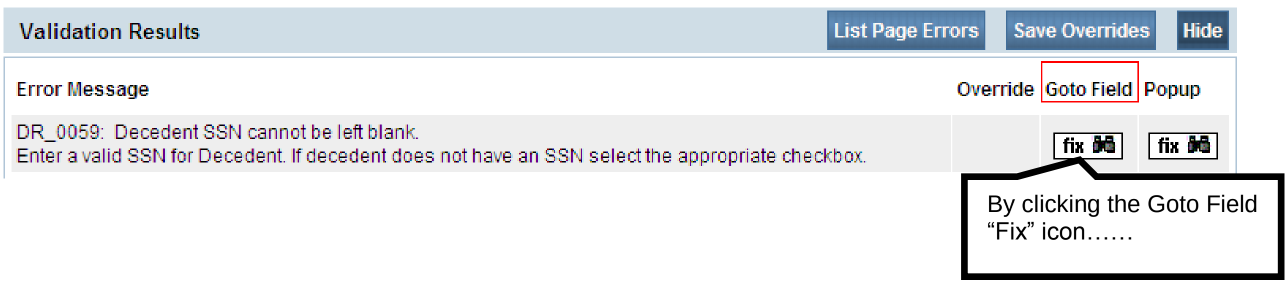
4. Notice also that the **List All Errors** button has now become the **List Page Errors** button. Clicking this button again will remove any errors not associated with the current registration page.

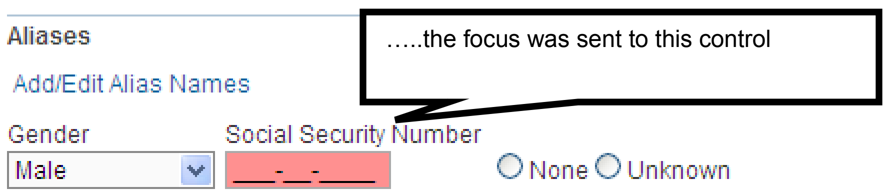
5. Click the **Hide** button to close the **Validation Results** frame. Re-validate any registration page to view the **Validation Results** frame again.



Error Correction Using the Goto Field Button

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

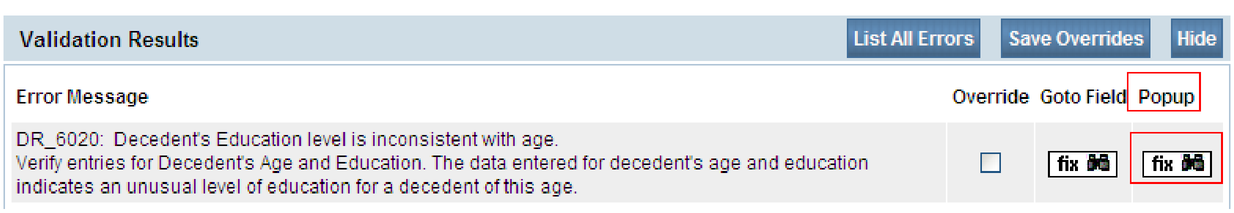




Note: "Focus" determines which onscreen element is the target of action. If a text box "has the focus", then anything typed on the keyboard appears in the text box. If a dropdown list "has the focus", the down-arrow will open the list and the up-arrow will close the list.

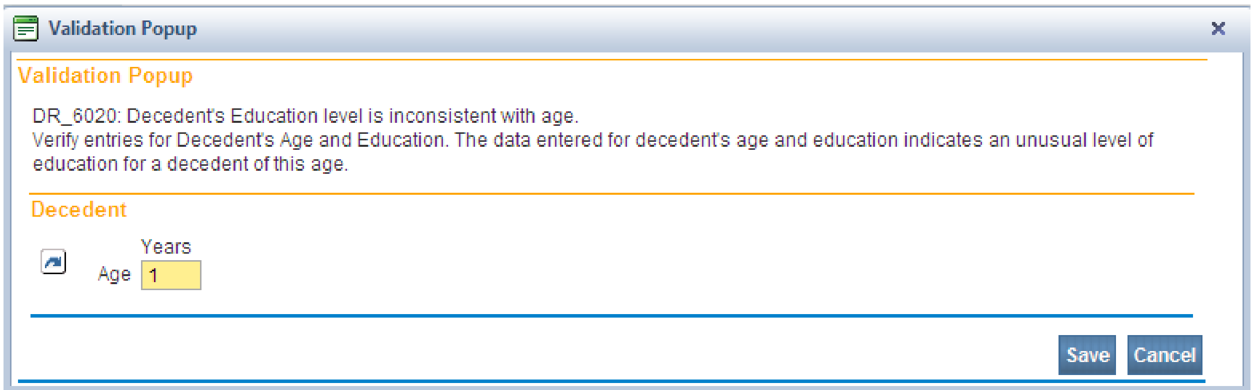
Error Correction Using the Popup Icon

7. Another method of correcting errors is to click the fix icon in the **Popup** column



to launch a popup window containing the error or errors to be corrected. This functionality is useful when an error is caused by conflicting entries across multiple registration pages. Rather than searching across many pages trying to determine which field contains the error, **Popup** presents all of the conflicting fields in one window.

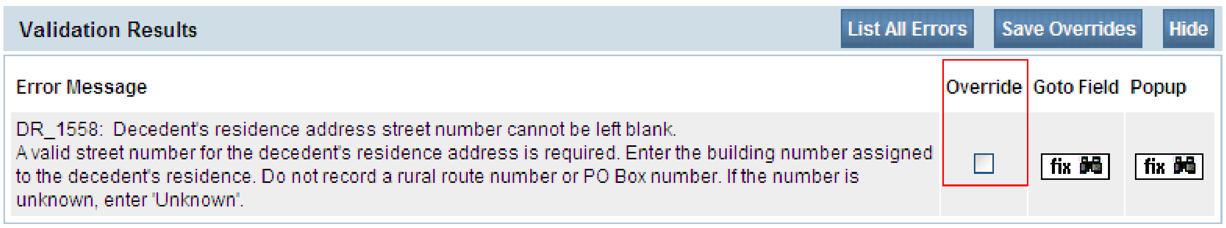
In the example below, a conflict between two separate fields generated error number **DR_6020**. Correcting either of the entries may correct the issue; however, more than one correction may be needed in some cases.



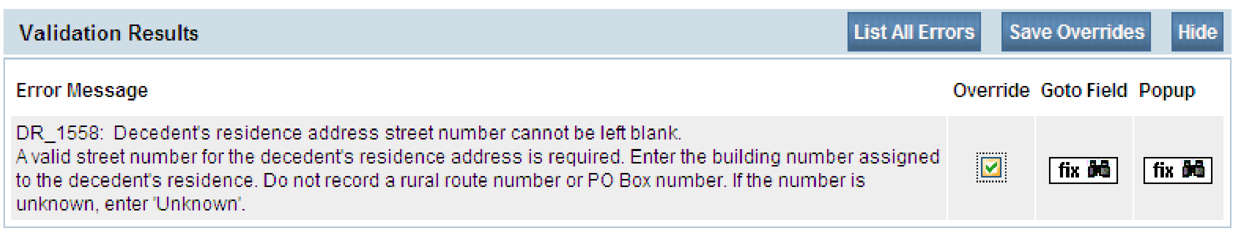
8. Correct the error and click the **Save** button to submit your changes. The popup will close and your changes will appear on the registration page. Click the **Cancel** button to close the popup without making any changes.

Overridable Errors

In certain instances, a record may still be registered, even if it contains types of errors. For those errors, a checkbox will be provided in the **Override** column.

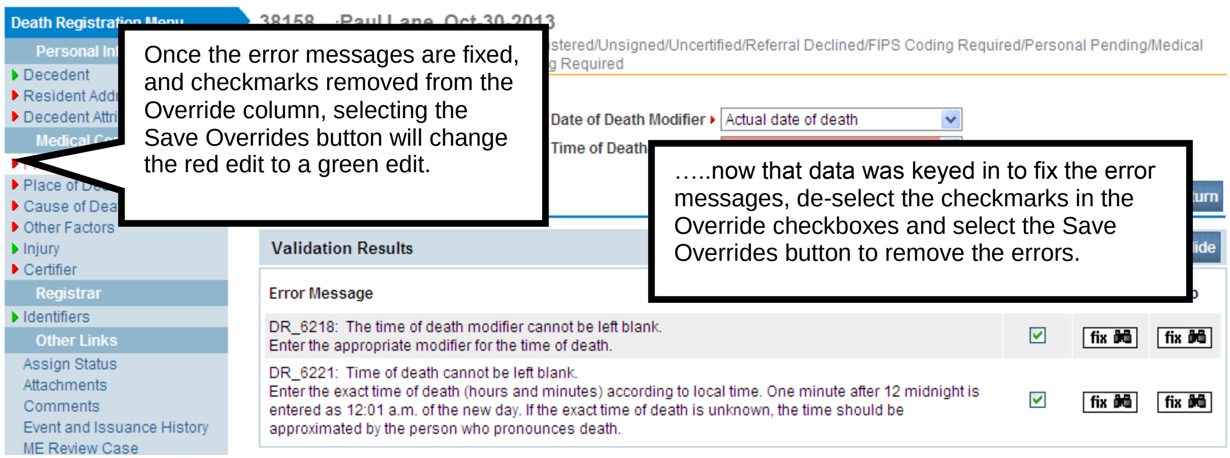


9. Place a checkmark (☑) in the **Override** box next to the error to be overridden and click the **Save Overrides** button. Select the Validate Page button again. This allows you to process a death record even if some errors are present.

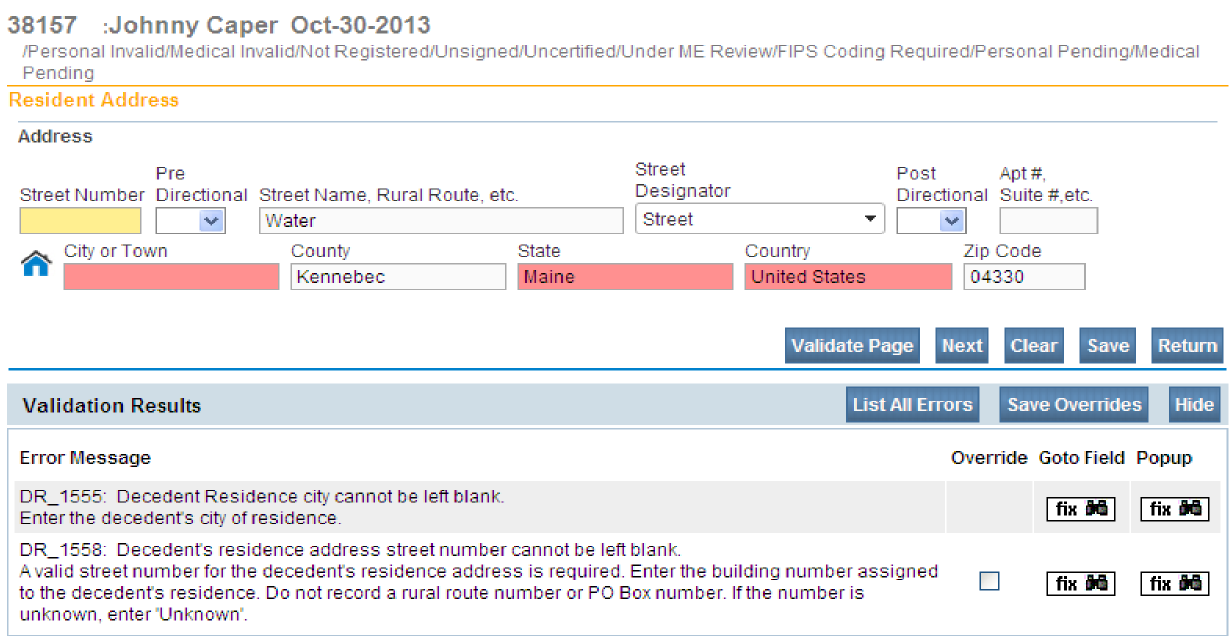


Note: If a checkmark is placed in the Override checkbox, and later the error is fixed, take the checkmark out of the checkbox, and select the Save Override button again. This will remove the error from the Validation Results page, and remove the hard edit (highlighted in red).

In the example below a checkmark was placed in the two Override checkboxes as the missing data was not available. Eventually, the missing data was keyed in (Time of Death and Time of Death Modifier). The checkmarks were then removed from the checkboxes, and the Save Overrides button was selected.



10. There are two types of errors in **DAVE™**: Hard and Soft. Hard edits are highlighted onscreen in red. Soft edits are highlighted in yellow.

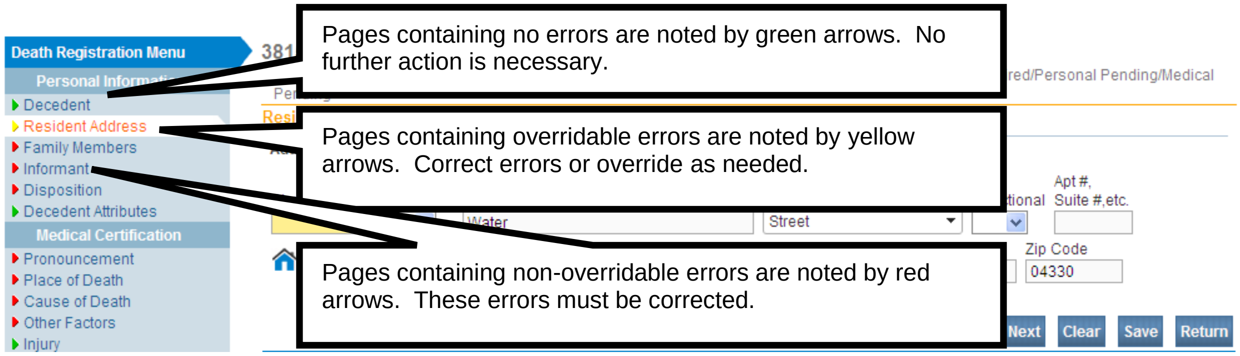


Notice that the City or Town field is highlighted in red. Registration will not be permitted until this error has been corrected. Note that there is no way to override error DR_1555 as there is no checkbox under the Override column.

Street Number is highlighted in yellow. Using the **Override** feature described above, this entry can be accepted as submitted and registration permitted.

Additionally, notice that certain pages on the various registration menus are marked with red, yellow, or green arrows.

These arrows serve as indicators as to which pages contain errors and which pages pass validation.



For example, pages marked with a green arrow contain no errors.

Pages marked with a red arrow contain hard edit rule failures that must be corrected before registration can be completed.

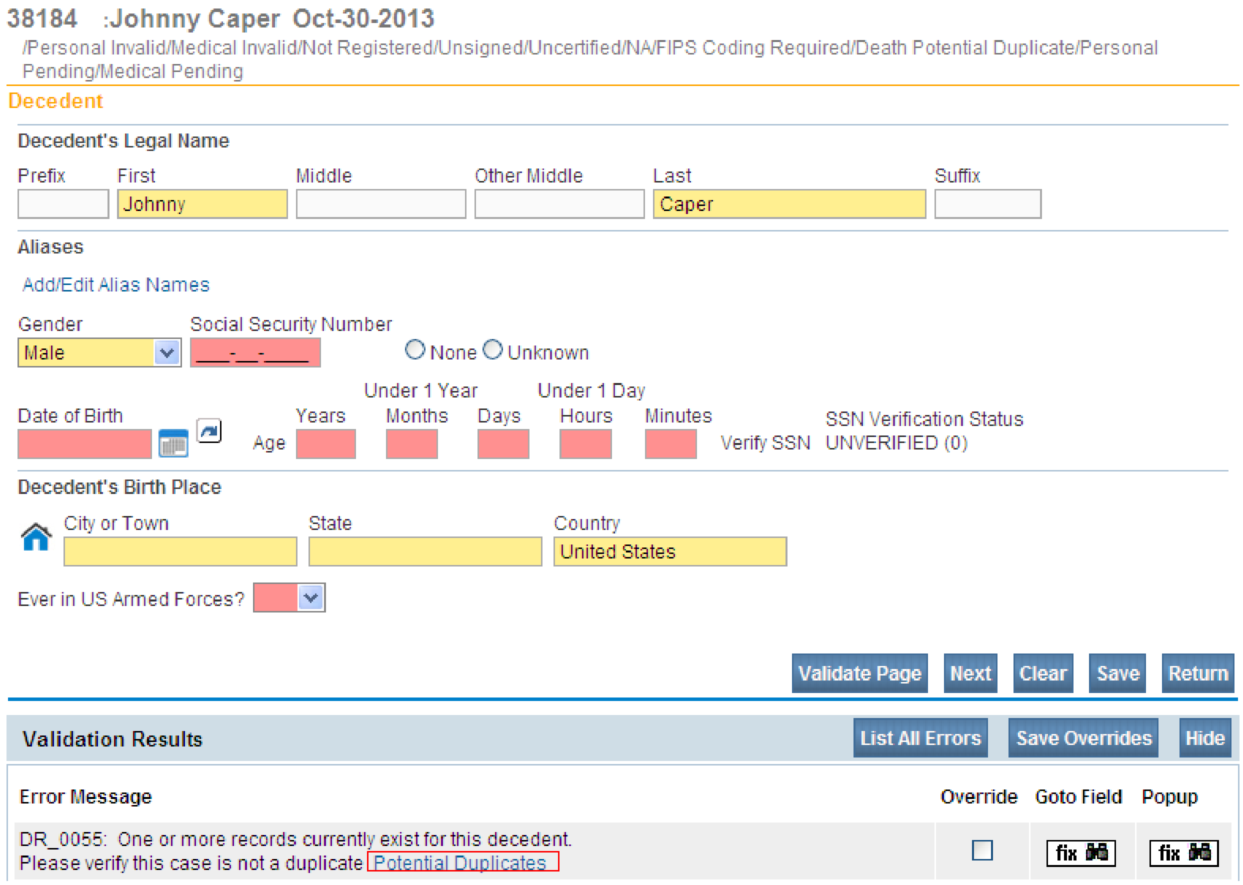
Pages marked with a yellow error contain soft edit rule failures that may be overridden or that have already been overridden.

Note: Anytime the Validate Page button is clicked the system will evaluate all pages and mark them accordingly with red, yellow, or green arrows.

Exercise 3.3 – Duplicate Record Resolution

Skill Learned: How to use the Potential Duplicates link to resolve duplicate records.

1. 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.

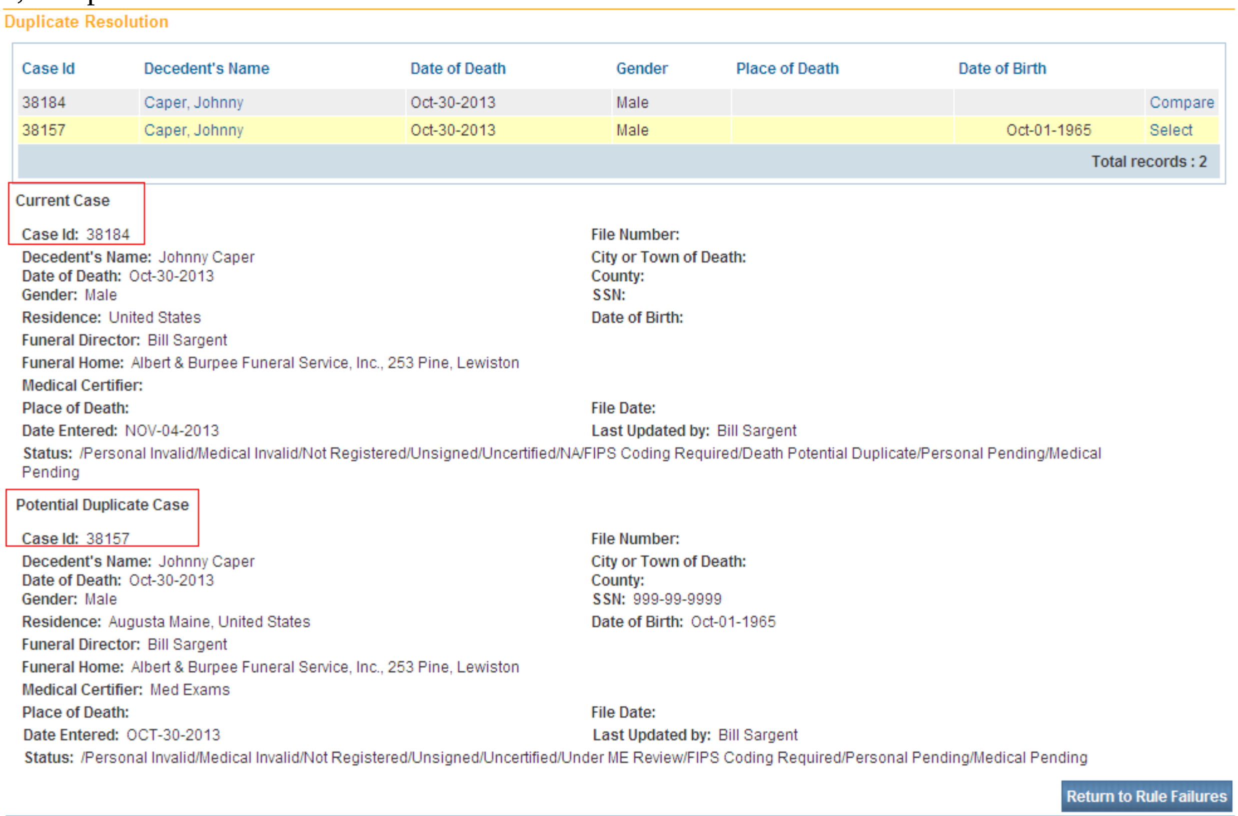


2. If **DAVE™** finds potential duplicates, an error message will appear in the **Validation Frame** containing the following message and link:

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

3. Click 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. Please note that all records may not be accessible. Access to the records displayed is based on the user's security profile. If one of the duplicate cases is not owned by the current office, it will be disabled.

4. Click the Compare 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.



Duplicate Resolution

Case Id	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
38184	Caper, Johnny	Oct-30-2013	Male			Compare
38157	Caper, Johnny	Oct-30-2013	Male		Oct-01-1965	Select
						Total records : 2

Current Case

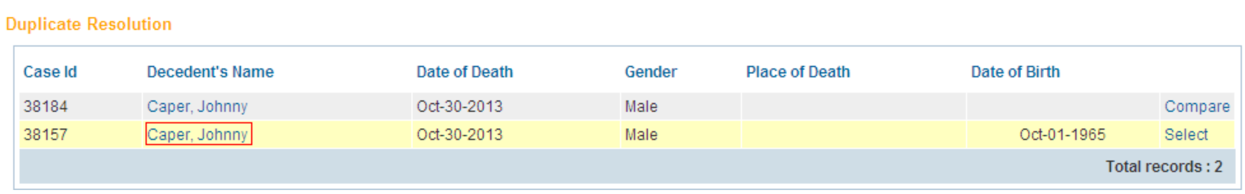
Case Id: 38184
Decedent's Name: Johnny Caper
Date of Death: Oct-30-2013
Gender: Male
Residence: United States
Funeral Director: Bill Sargent
Funeral Home: Albert & Burpee Funeral Service, Inc., 253 Pine, Lewiston
Medical Certifier:
Place of Death:
Date Entered: NOV-04-2013
File Number:
City or Town of Death:
County:
SSN:
Date of Birth:
File Date:
Last Updated by: Bill Sargent
Status: /Personal Invalid/Medical Invalid/Not Registered/Unsigned/Uncertified/NA/FIPS Coding Required/Death Potential Duplicate/Personal Pending/Medical Pending

Potential Duplicate Case

Case Id: 38157
Decedent's Name: Johnny Caper
Date of Death: Oct-30-2013
Gender: Male
Residence: Augusta Maine, United States
Funeral Director: Bill Sargent
Funeral Home: Albert & Burpee Funeral Service, Inc., 253 Pine, Lewiston
Medical Certifier: Med Exams
Place of Death:
Date Entered: OCT-30-2013
File Number:
City or Town of Death:
County:
SSN: 999-99-9999
Date of Birth: Oct-01-1965
File Date:
Last Updated by: Bill Sargent
Status: /Personal Invalid/Medical Invalid/Not Registered/Unsigned/Uncertified/Under ME Review/FIPS Coding Required/Personal Pending/Medical Pending

Return to Rule Failures

5. If the **Preview** window does not provide enough information, then click the Decedent's Name link to open the actual record.

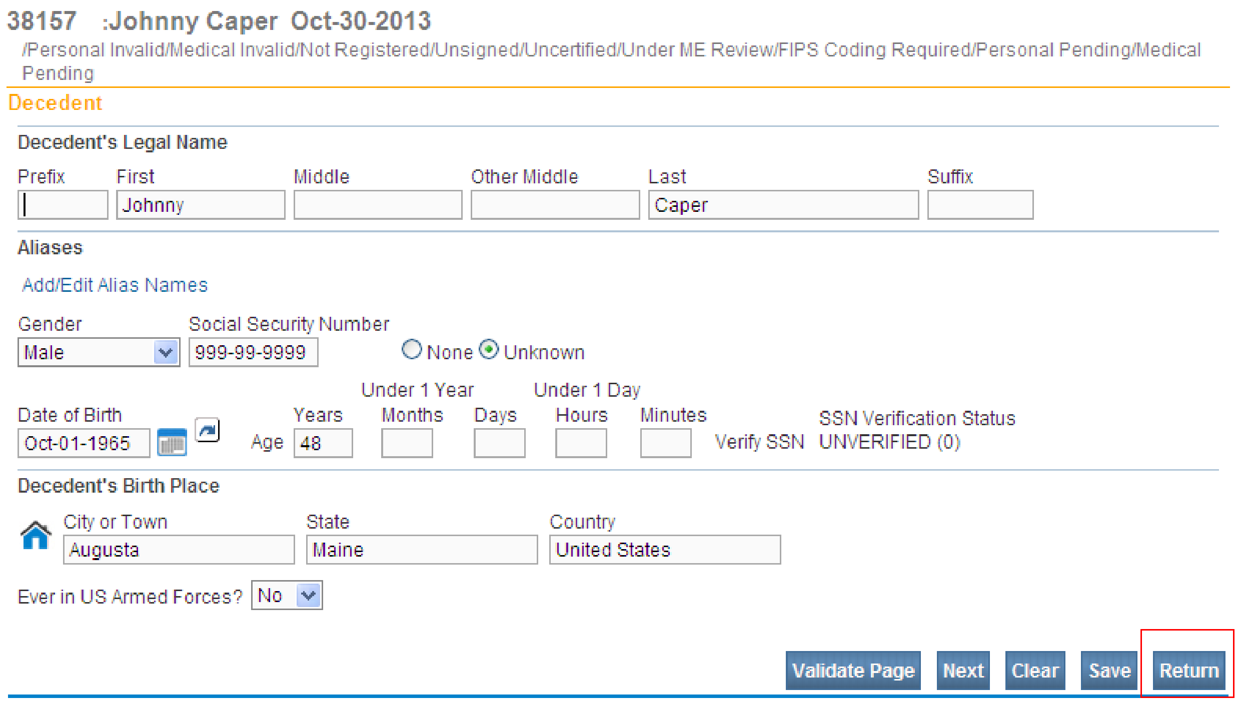


Duplicate Resolution

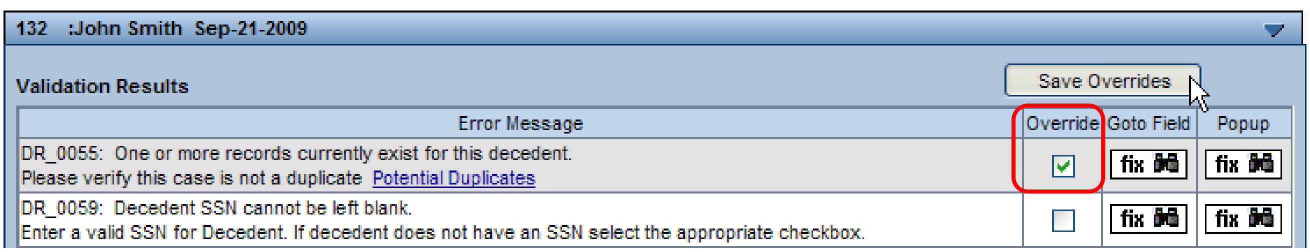
Case Id	Decedent's Name	Date of Death	Gender	Place of Death	Date of Birth	
38184	Caper, Johnny	Oct-30-2013	Male			Compare
38157	Caper, Johnny	Oct-30-2013	Male		Oct-01-1965	Select
						Total records : 2

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

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



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

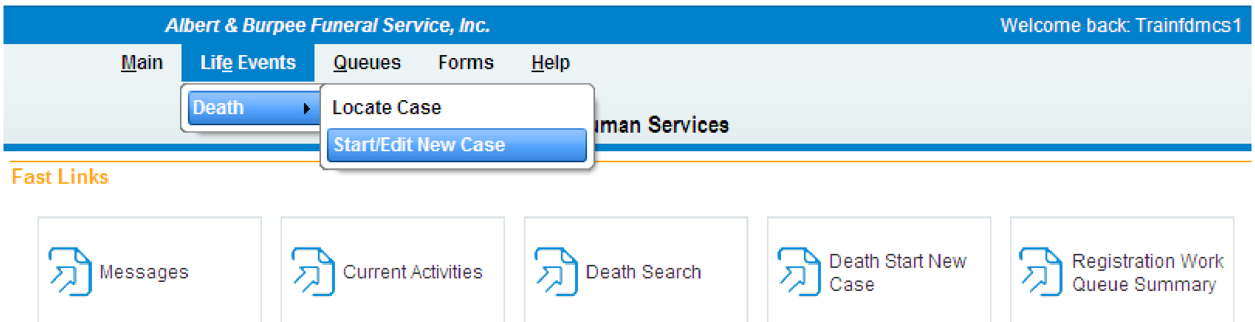


Section 4: Start/Edit New Case as Funeral Home User

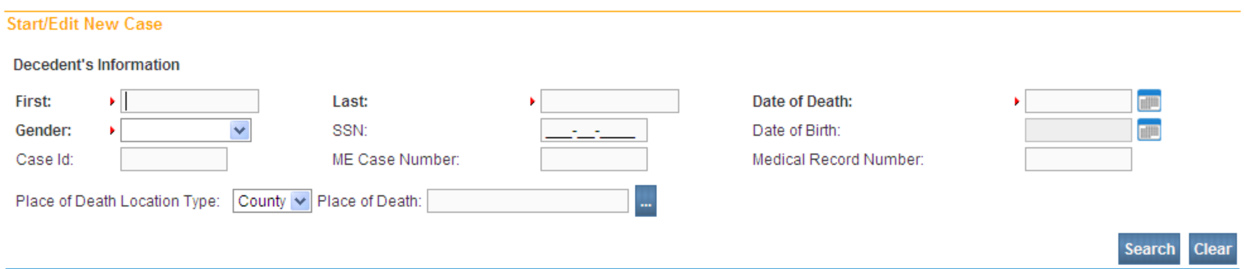
Exercise 4.1 – Required Fields

Skill Learned: Completion and execution of the **Start/Edit New Case** page.

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

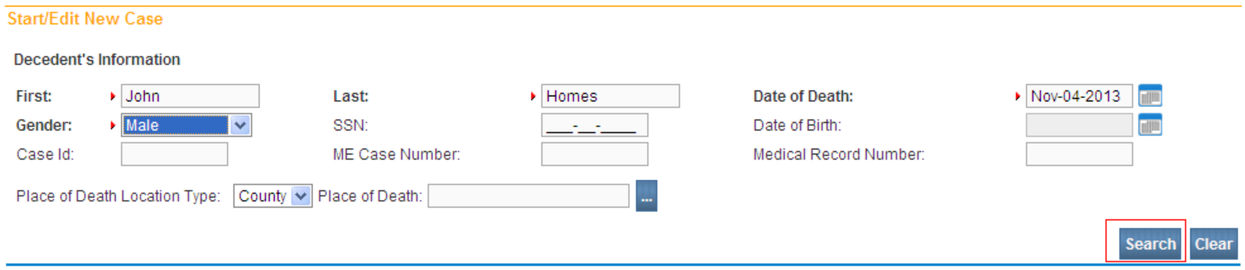


2. This will bring up the **Start/Edit New Case** page shown below. Notice that **First:**, **Last:**, **Date of Death:**, and **Gender** are all marked with red arrows(). Fields denoted by red arrows are required entries that must be completed before you will be allowed to proceed.

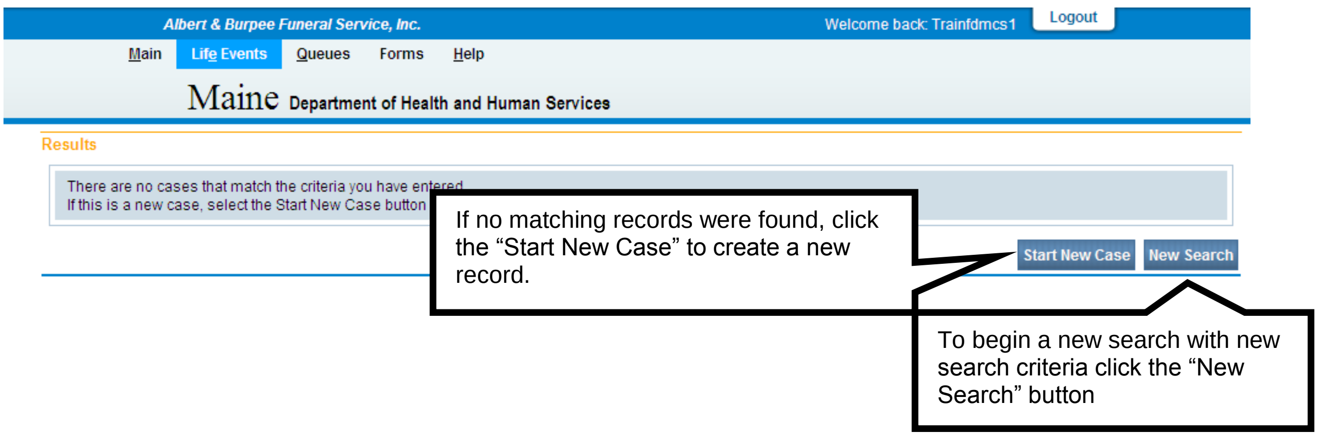


Note: Before you create a new Death Record you must first search for a possible existing record by selecting the Start/Edit New Case. This is to prevent the creation of duplicate Death Records.

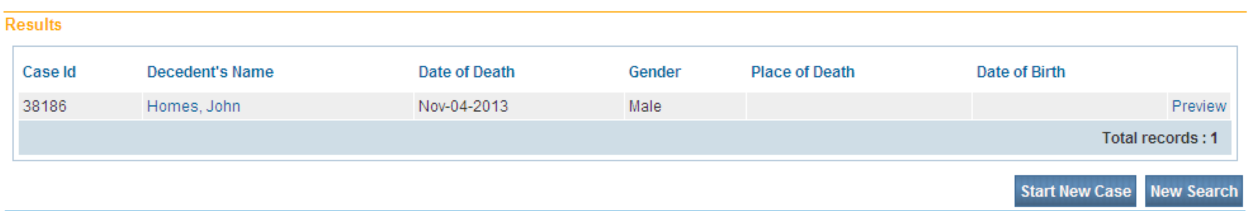
3. Once you have filled in the required fields, click the **Search** button to proceed or, if you need to, click the **Clear** button to clear all entries and start over.



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



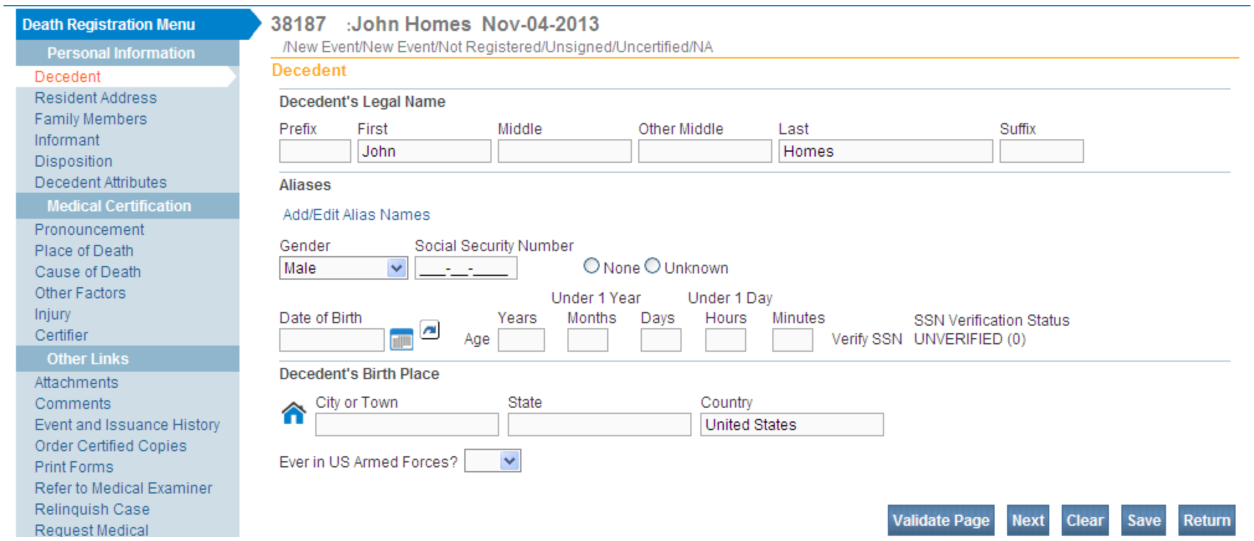
5. If a matching event was found, click the **Decedent's Name** to open the record, or the Preview link to check if this record could possibly be a duplicate record.



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

Note: All of the column headers on the search Results page are underlined links. Clicking any of these links will re-sort the table data accordingly.

7. Clicking the **Start New Case** button above will launch the **Decedent** page, as shown below. The **Home** page collapses and the **Death Registration Menu** expands.

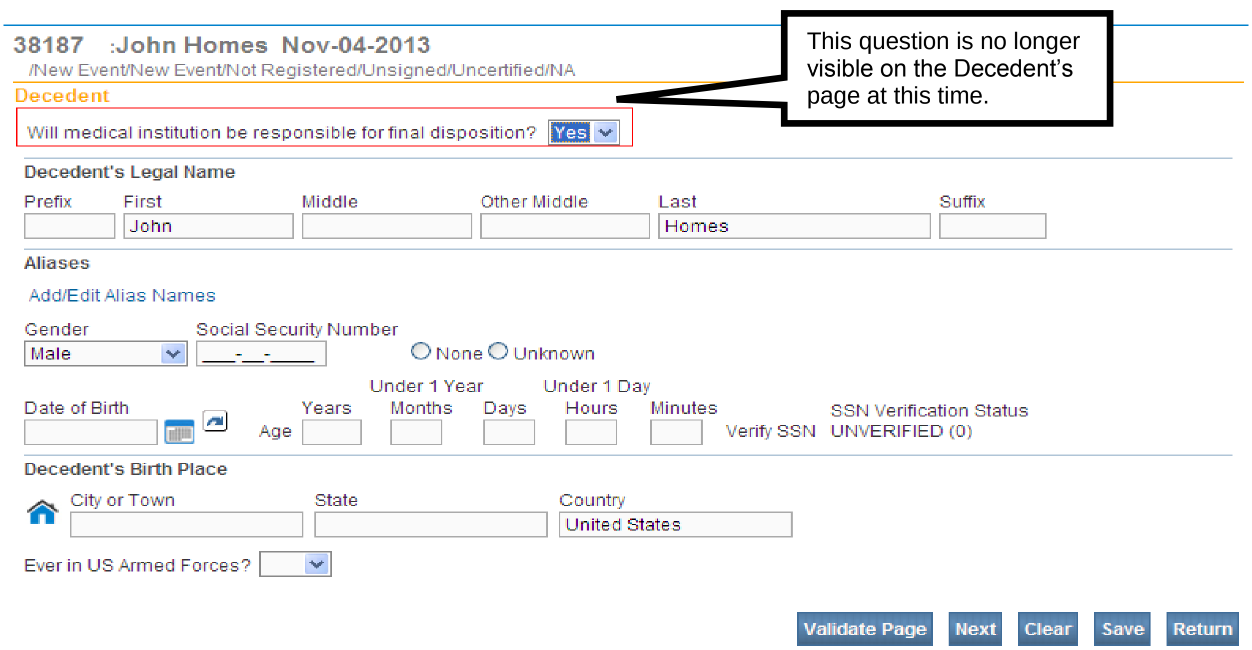


Exercise 4.2 – Decedent

Skill Learned: How to complete the **Decedent** page.

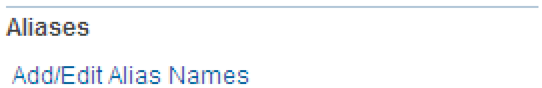
1. The **Will medical institution be responsible for final disposition?** defaults to **Yes**.

Note: Currently this question is "not visible".

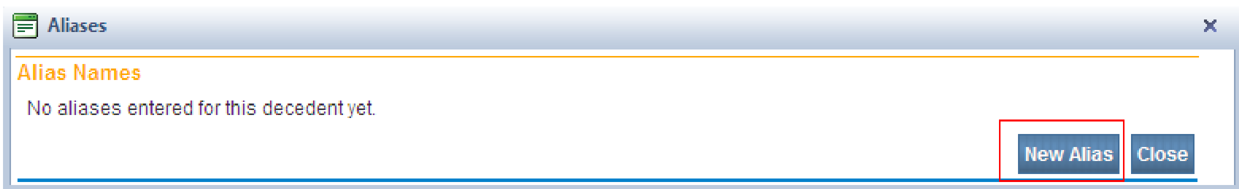


2. Complete the **Decedent's Legal Name** tab. **Prefix** is used to record titles such as Mr., Mrs., Father, Sister, Monsignor (Msgr), etc. Enter the **First**, **Middle**, and **Last** name of the decedent. If the decedent had more than one middle name, include it in the **Other Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc.

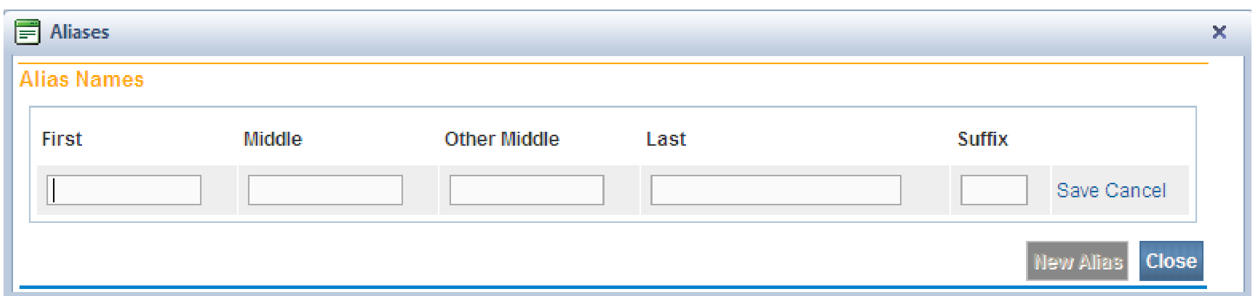
3. If the decedent was known by more than one name, click the **Add/Edit Alias Names** on the **Aliases** tab.



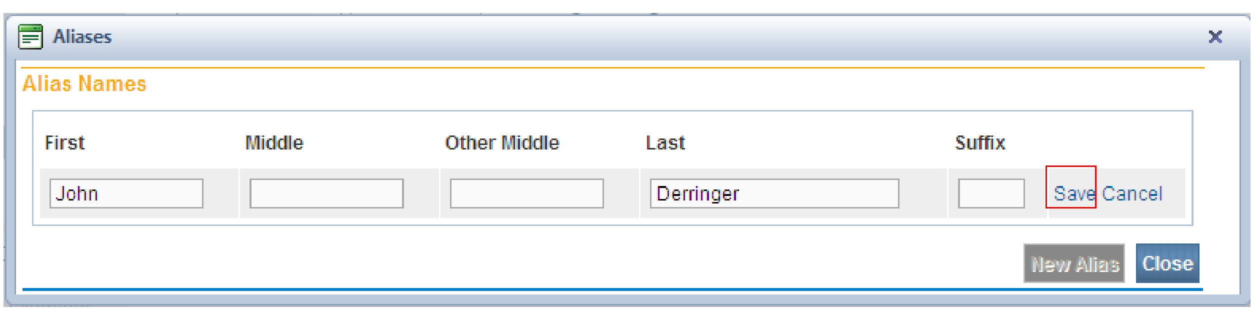
4. The **Aliases** pop-up page will appear onscreen. To add a new alias, click the **New Alias** button.



5. Clicking the **New Alias** button will open the **Alias Names** page shown below.

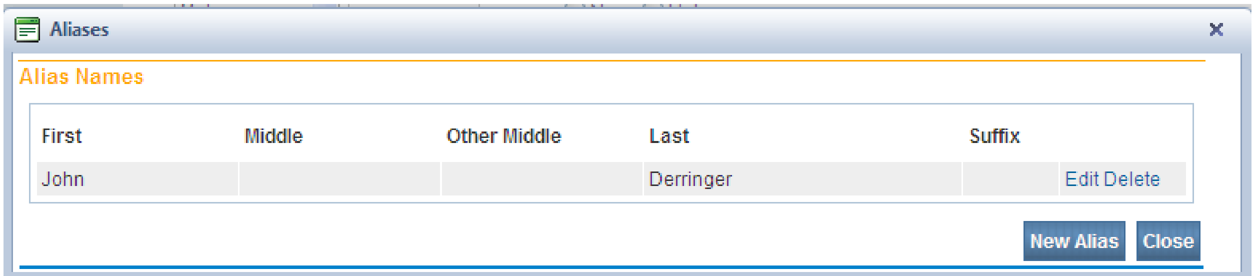


6. Once you have entered the **New Alias** information, click the Save link to save your changes. Click **Cancel** to close the page without saving changes.



7. Saving the changes above will cause the page to refresh and display the **Alias Name** summary page shown below. Notice that the Save and Cancel links now read Edit and Delete. Click the Edit link to change the alias or the Delete link to remove the alias from the record.

8. Click the **Close** button to return to the **Decedent** page.



9. Notice that the **Aliases** tab now displays the newly added **Alias**.

10. The **Gender** dropdown list will be pre-populated based on the selection that was made on the **Search** page.

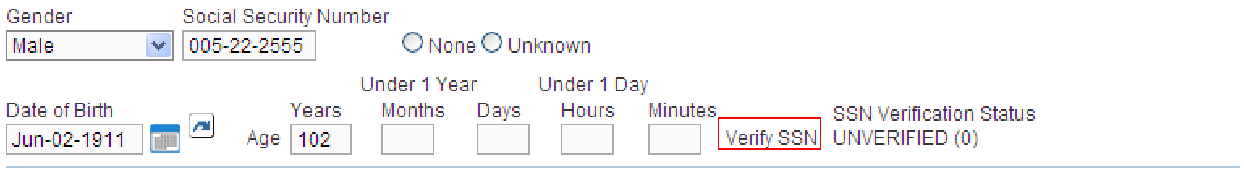
11. Enter the decedent's Social Security Number in the **Social Security Number** field. If decedent has no SSN then select the **None** radio button. If the decedent's SSN is not known, select the **Unknown** radio button.

12. Enter the decedent's **Date of Birth.**

13. The **Age** fields must be completed before registration can occur. In the **Age** field, enter the decedent's age at time of death. If the decedent was **Under 1 Year** old at the time of death then leave the **Age** field empty and fill in the **Months** and **Days** fields. If decedent was **Under 1 Month** old at the time of death, then fill in the **Hours** and **Minutes** fields.

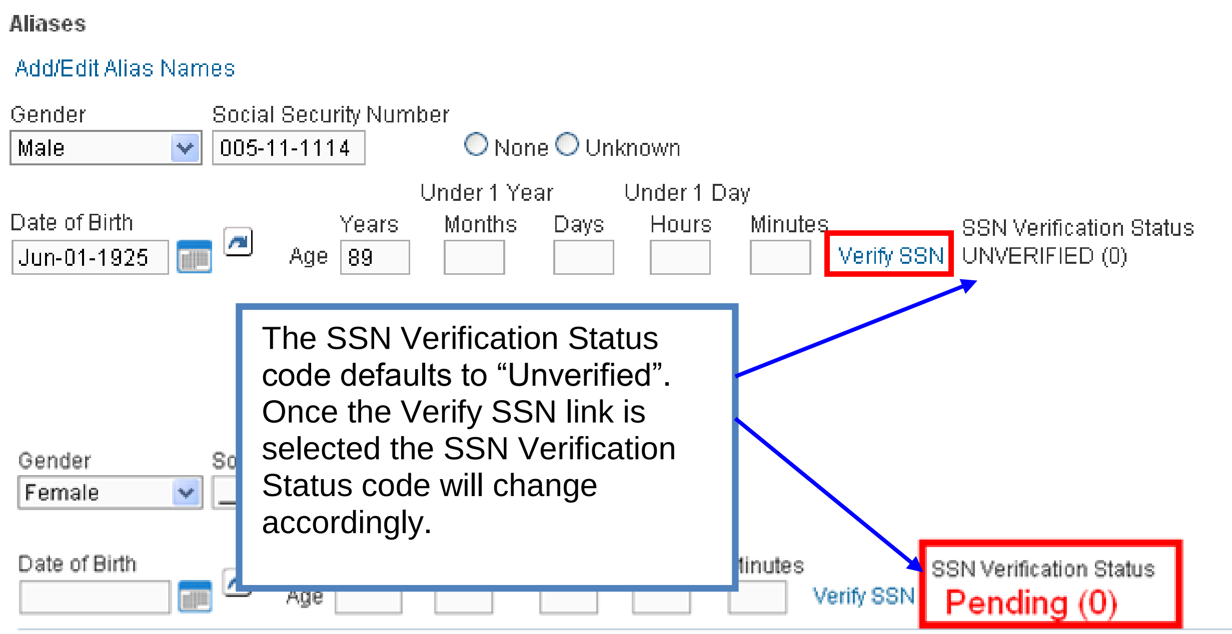
Note: Before clicking on the Verify SSN link (next step) it is mandatory that the decedent's first name, last name, gender, social security number, and date of birth fields be completed. Also, do not click the Verify SSN link if the Social Security Number is "none" or "unknown".

14. Click the Verify SSN link as shown below.



When the user clicks the Verify SSN link, the DAVE™ application sends a request to the Social Security Administration (SSA) to verify that the social security number (SSN) on the case matches their records. The Social Security Administration will return a status code indicating the success or failure of the verification request. All requests sent to the SSA are encrypted ensuring both the security and integrity of the data.

The **Decedent** page will refresh and the SSN Verification Status code will change from UNVERIFIED(0) to PENDING (0) , or another status code depending on the situation. Once the SSN has been verified or failed verification, the page will refresh once more with an appropriate status code such as, "Passed", "Invalid", etc.



15. The **Decedent's Birth Place** tab is used to record the decedent's birth place.

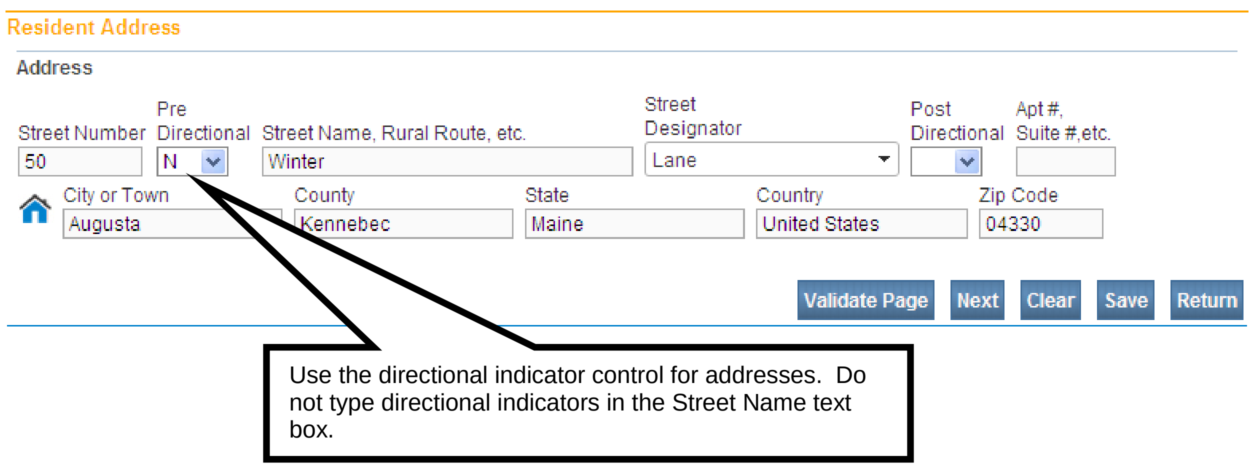
16. Lastly, select **Yes** or **No** from the **Ever in US Armed Forces?** dropdown list.

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

Exercise 4.3 – Residence Address

Skill Learned: How to complete the **Resident Address** page.

1. Make sure that the **Resident Address** page records the decedent's last known address.



2. If the street address has a **Pre-Directional** indicator, i.e. *East* Eastern St. West, then indicate that by selecting "E" from the **Pre-Directional** dropdown list. Do NOT type the **Pre-Directional** indicator in the **Street Name** field.

3. If the street address has a **Post-Directional** indicator, i.e. East Eastern St. *W*, then indicate that by selecting "W" from the **Post-Directional** dropdown list. Do NOT type the **Post-Directional** indicator in the **Street Name** field.

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

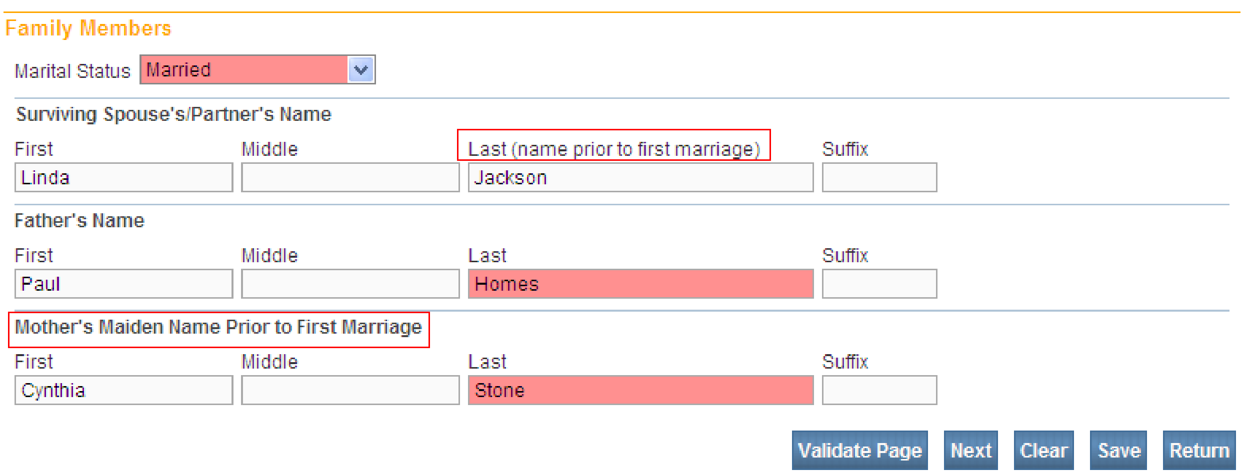
Exercise 4.4 – Family Members

Skill Learned: How to complete the **Family Members** page.

1. First, make a selection from the **Marital Status** dropdown list. Above the **Surviving Spouse Name** field is a dropdown list entitled **Marital Status**. The decedent's marital status must be entered here. If status is not known, then select **Unknown**.

2. Most of the fields on this page are self-explanatory. If, however, the **Surviving Spouse's/Partner's Name** is that of the wife, then her maiden name must be used in the **Last** name field.

3. Likewise, the decedent's **Mother's Maiden Name Prior to First Marriage** must also be completed.



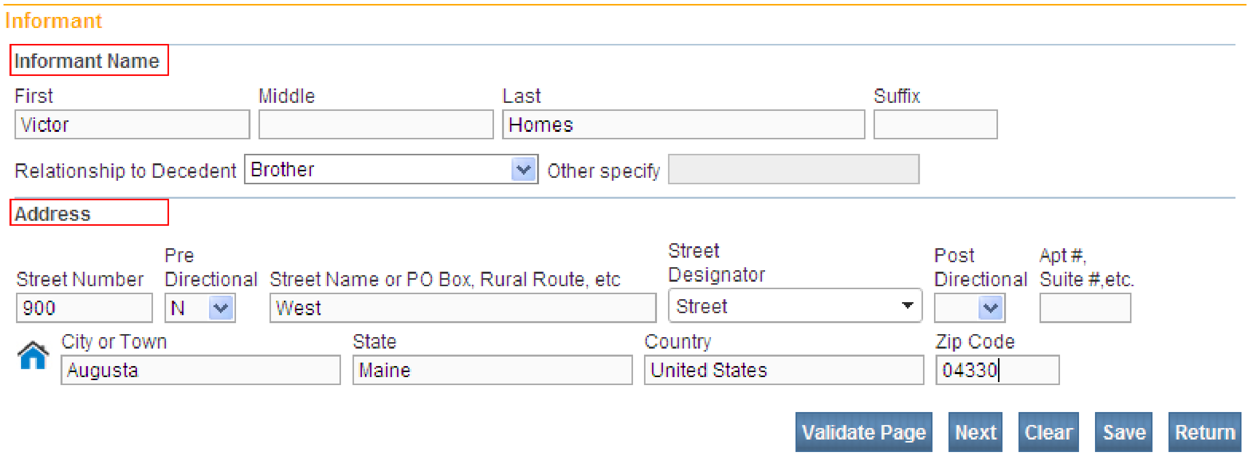
Note: If surviving spouse is the wife, then her Maiden name must be entered. Likewise, decedent's mother's maiden name must also be used.

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

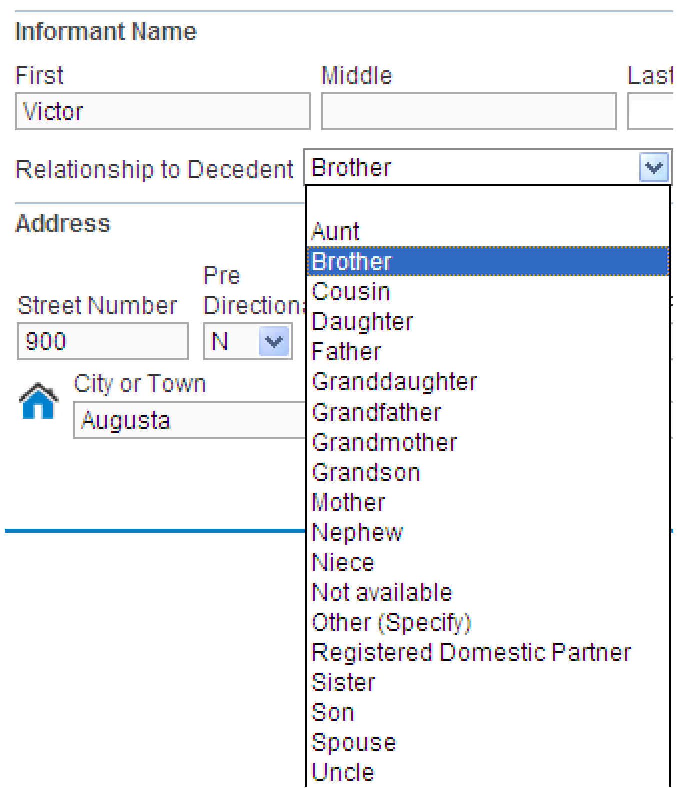
Exercise 4.5 – Informant

Skill Learned: How to complete the **Informant** page. The **Informant** page is used to gather information concerning the person reporting the death.

1. Enter the informant's name in the **Informant Name** tab.



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



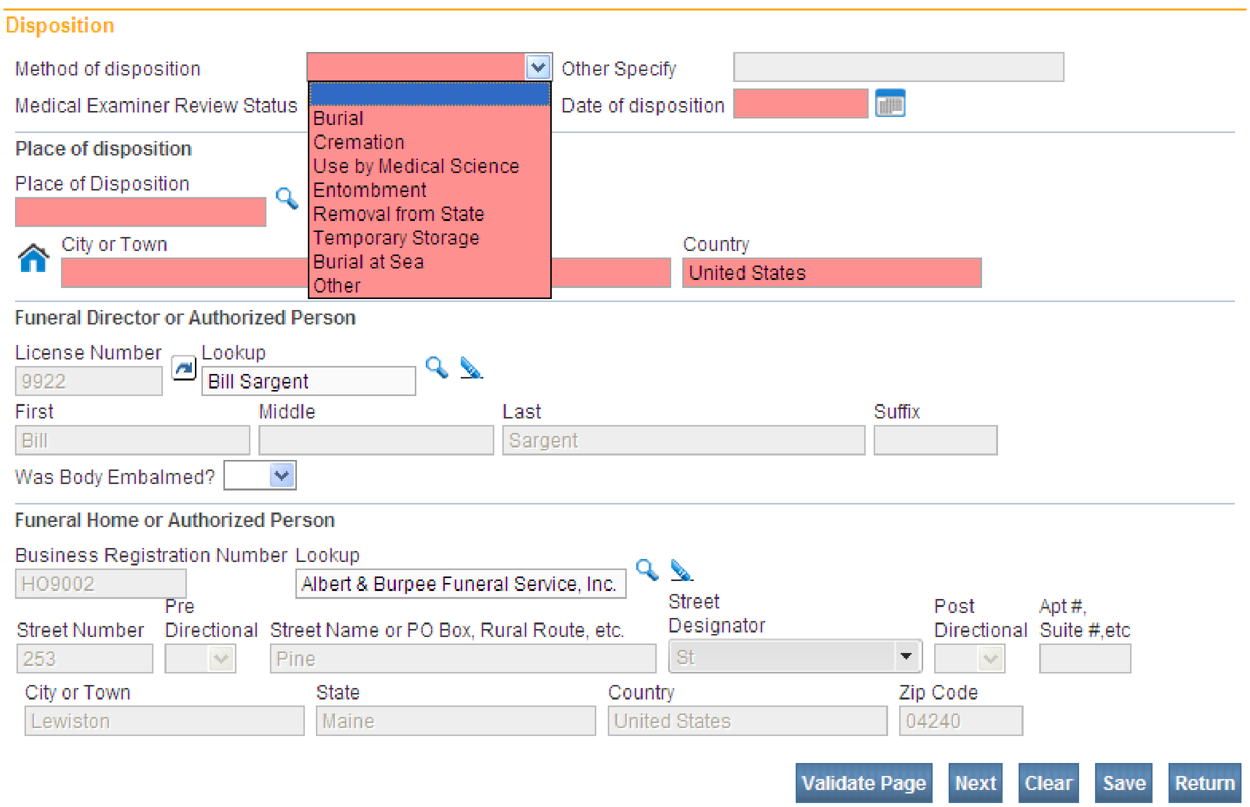
3. If the appropriate relationship cannot be found in the list then select **Other** and fill in the correct relationship in the **Other Specify** field.

4. Complete the **Address** tab by entering the informant's address information.

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

Exercise 4.6 –Disposition

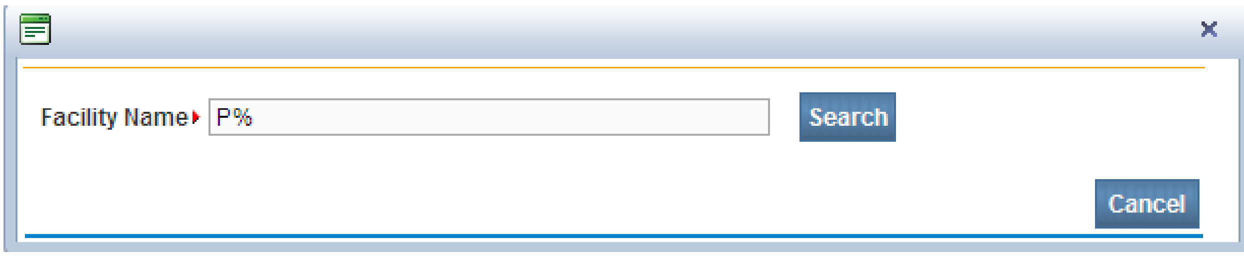
Skill Learned: How to complete the **Disposition** page. For funeral home users, the fields on this page will be auto-filled based on the facility with which the user is associated. If the user is associated with more than one facility, then the fields on this page will be auto-filled based on the office selected at login.

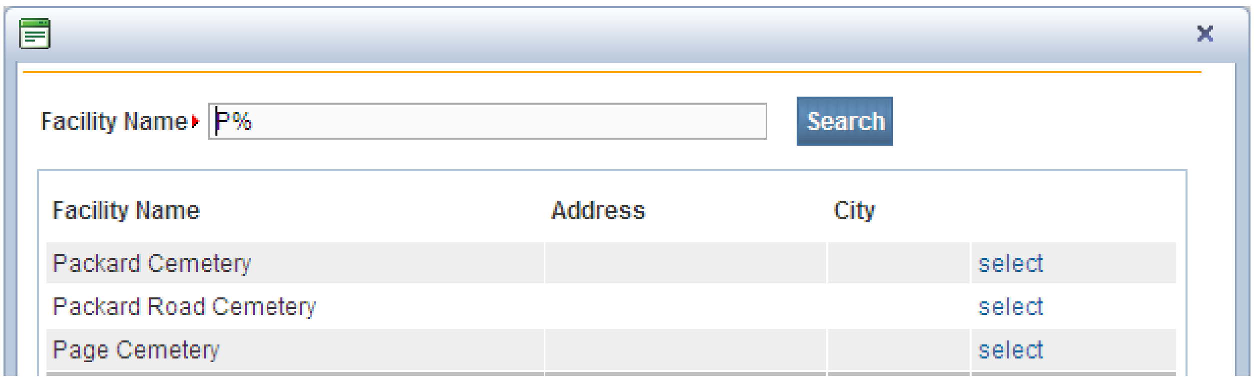


1. Make a selection from the **Method of Disposition** dropdown list. In the example above, we have chosen **Burial**. If the method used does not appear on the list, then select **Other** and enter the correct method of disposition in the **Other Specify** field.

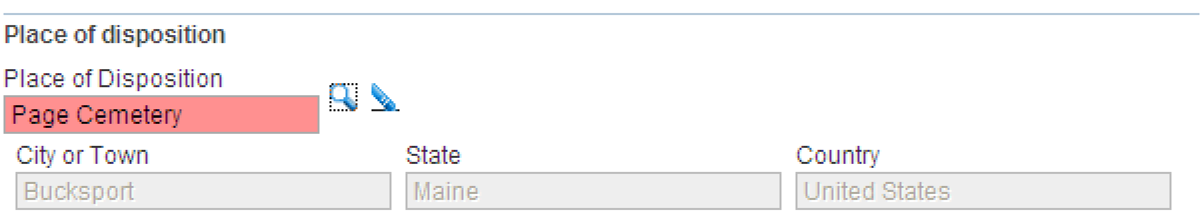
2. Next, enter a valid **Date of disposition** manually or use the **Calendar** icon ( ) to launch the **Calendar** control (see Using Calendars).

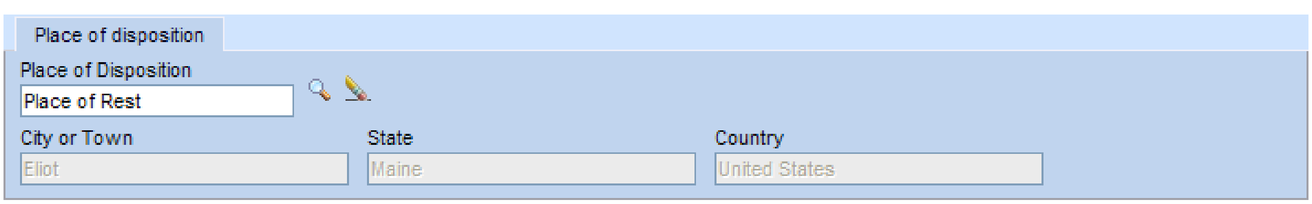
3. Clicking the **Place of disposition Lookup** ( ) control will launch the **Facility Name** search tool shown below. Enter all or a portion of the facility name in the field and click the **Search** button. Note: **Facility Name** lookup controls are compatible with Wild Card searches.





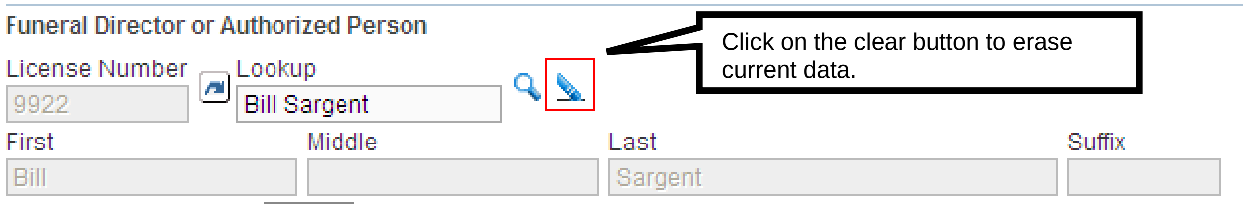
4. Clicking the select link will auto-fill the **Place of Disposition** field.



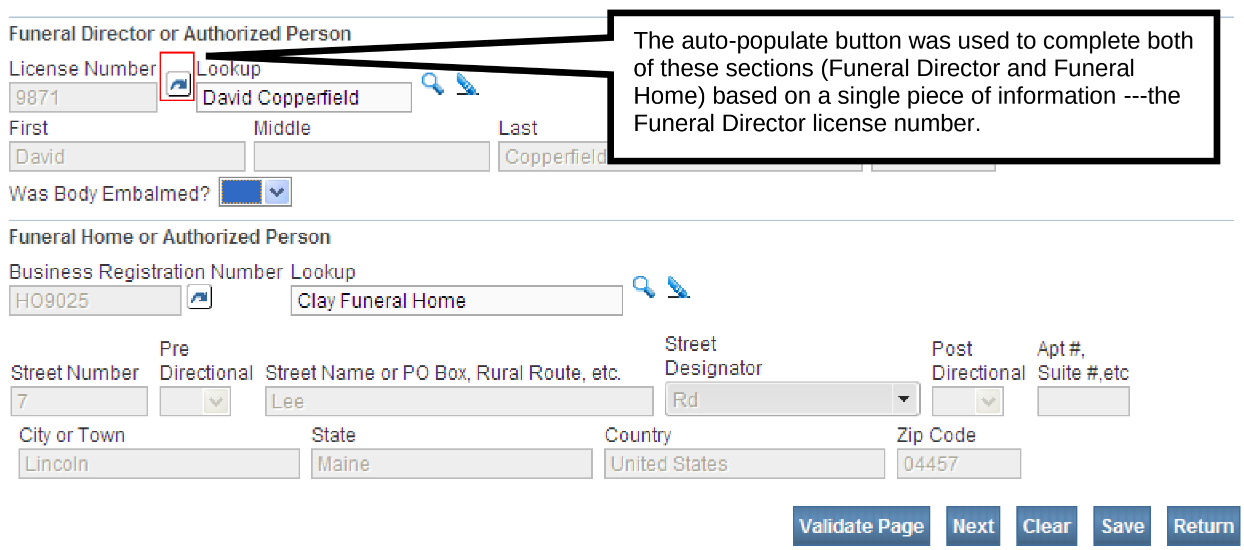


The **Funeral Director** and **Funeral Home** information will be system filled based on the office the user selected at login. However, if one funeral home were completing a case for another funeral home as part of a Trade Call then this data may need to change. In those instances, there are two ways these fields can be changed and the data re-entered. One way is to use the standard **LookUp** controls as described in Lookup Controls. Alternatively, you can enter the Funeral Director **License Number** or the Funeral Home **Business Registration Number** and use the auto-populate button ( ) to complete the fields.

5. Locate and click the **Clear** button ( ) to erase current Funeral Director and Funeral home data.



6. In the example below, we have entered a known license number: 9871. Clicking the auto-complete button ( ) will automatically locate the funeral director corresponding to that license number and insert that funeral practitioner's data into the fields. Notice that both the **Funeral Director** and the **Funeral Home** data are auto-populated.



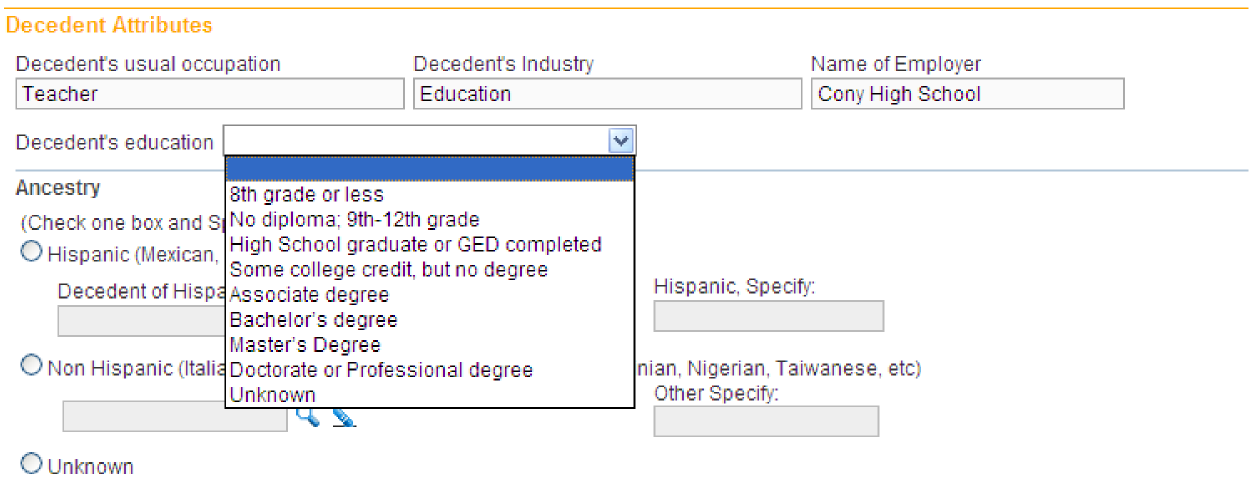
Note: Auto-population of the funeral home data will only occur if the funeral practitioner selected is associated with a single funeral home. If the funeral director is associated with multiple funeral homes, the funeral home data must be entered here.

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

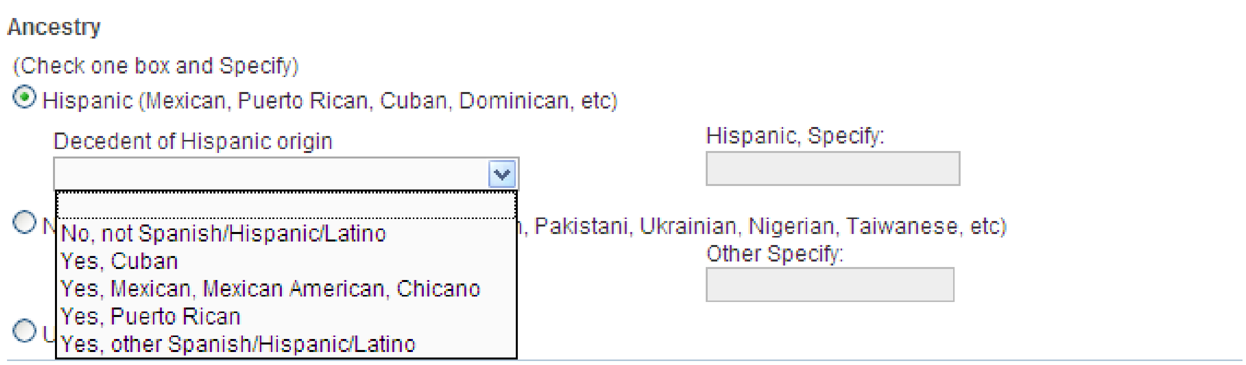
Exercise 4.7 – Decedent Attributes

Skill Learned: How to complete the **Decedent Attribute** page. All information entered on this page should be relative to the decedent.

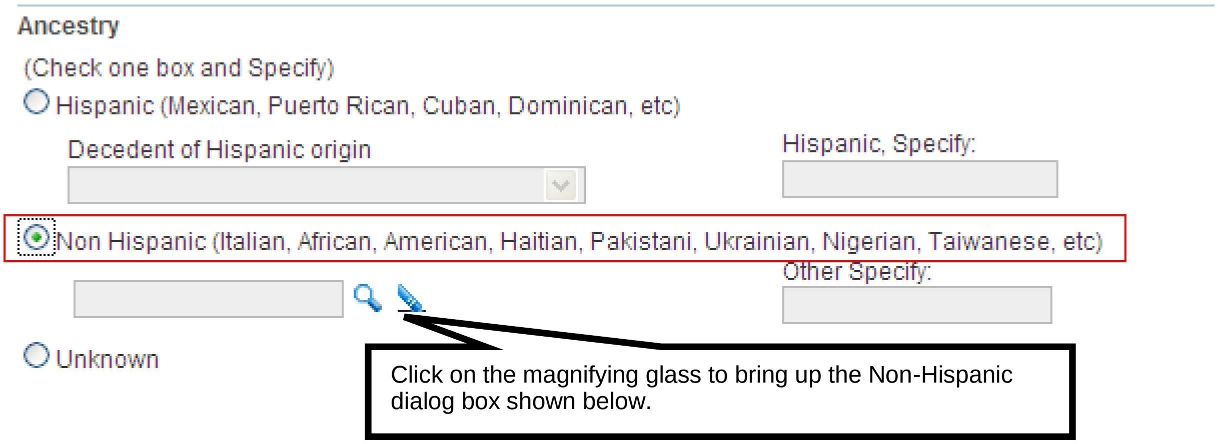
1. Complete the top portion of this page by entering the decedent's last known **Occupation**, **Industry,** and **Employer**. Also, make a selection from the **Decedent's education** dropdown list.



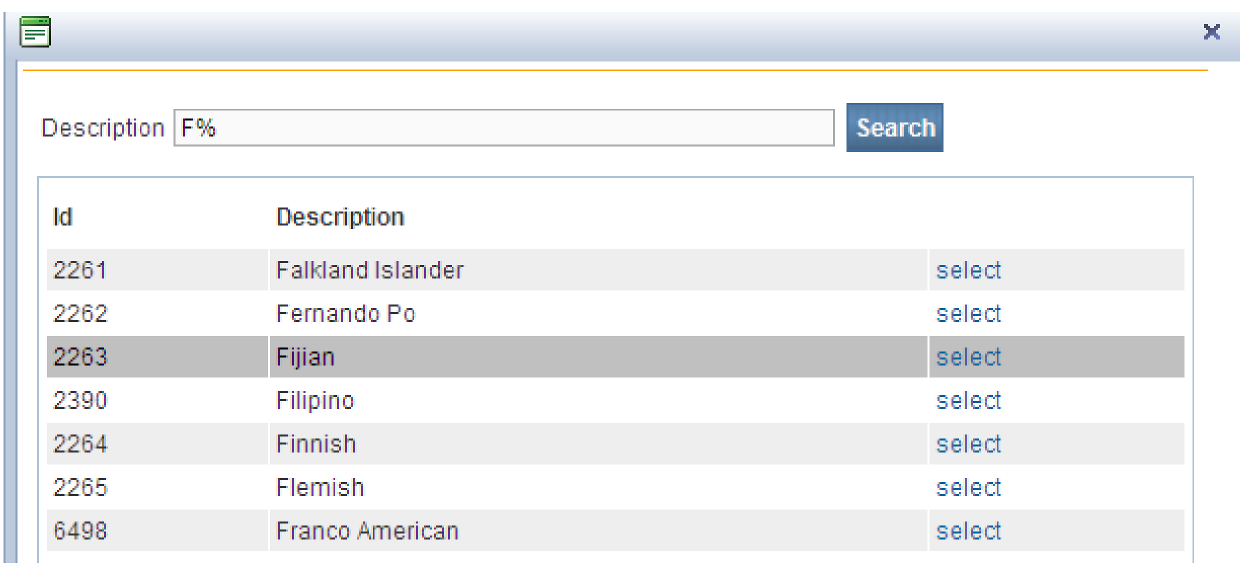
2. If the mother/parent is of Hispanic origin, click the **Hispanic (Mexican, Puerto Rican, Cuban, Dominican, etc.)** radio button and make a selection from the **Decedent of Hispanic Origin** dropdown list. If **Yes, Other Spanish/Hispanic/Latino** is selected, then the **Hispanic, Specify** field will be activated and must also be completed.



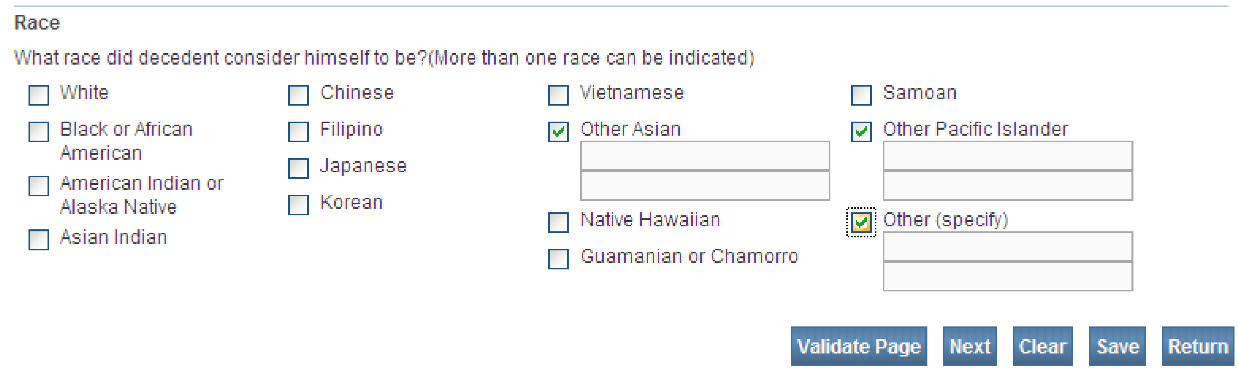
3. If the decedent is of non-Hispanic origin, select the **Non Hispanic (Italian, African American, Pakistani, Ukrainian, Nigerian, Taiwanese, etc)** radio button. This will activate the **LookUp Non-Hispanic** field. Click the magnifying lens icon to launch the ancestry **LookUp** control.



4. From the ancestry **LookUp** control, enter the ancestry type associated with the mother/parent and click **Search**. If you are unsure of the ancestry spelling, a Wild Card character can be used. By entering "F%" and clicking the **Search** button, the user is instructing **DAVE™** to LookUp and return a list of all ancestry types that begin with the letter "F". Once the ancestry type has been located, click the select link to auto-fill the **Ancestry** controls on the **Decedent Attributes** page.



5. Lastly, complete the **Race** tab by selecting one or more races that the decedent considered himself/herself to be. Notice that if **Other Asian (Specify)**, **Other Pacific Islander (Specify)**, or **Other (Specify)** are selected, then the page will expand and display additional fields in which to enter other specific race(s). Note: Multiple race selections are permitted.

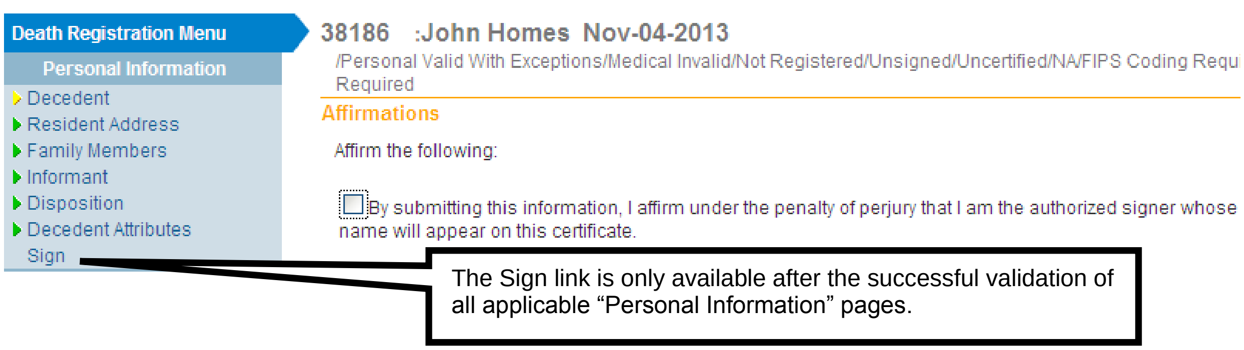


6. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Sign/Affirmation** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Home** page.

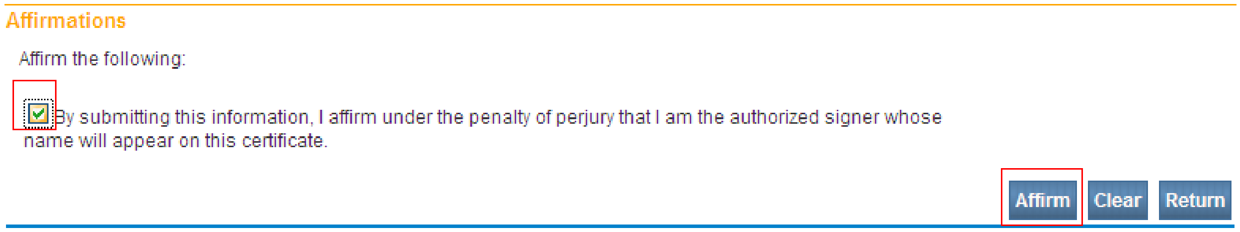
Exercise 4.8 – Sign

Skill Learned: How to complete the **Sign/Affirmations** page. An affirmation is used to record the fact that the person signing the record is accepting legal responsibility for the accuracy of the information provided.

1. Upon completion and successful validation of all death registration pages, the **Sign** page will be made available to funeral practitioners.



2. To Sign the record and achieve a status of "Signed", place a checkmark in the **Affirm the following** checkbox, and click the **Affirm** button.



3. Click the **Return** button to return to the **Decedent** page.

Exercise 4.9 – Un-Sign

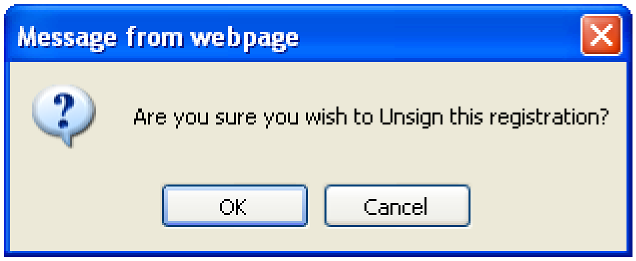
Skill Learned: How to remove the **Affirmation** from the **Personal Information.** Once the Personal Information has been signed, the information is locked and can no longer be changed. If the user decides that further record updates are necessary, he/she can un-sign the record, make the changes, and sign again.

Please note: A record cannot be un-signed after it has been Registered or Dropped to Paper.

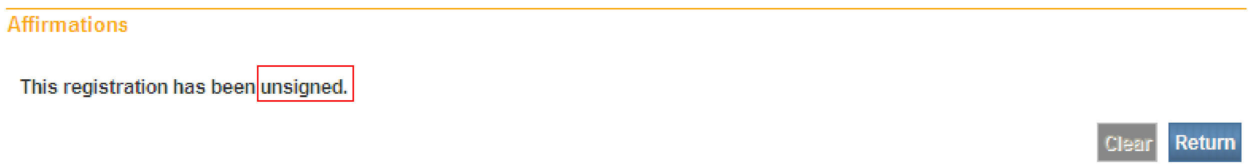
1. To un-sign a record, click on the Sign link as shown below.

2. The Affirmations Page will be displayed. Select the Unsign button to remove the affirmation and un-sign the case.

3. The user will be prompted with a confirmation pop-up. Click OK to continue or Cancel to leave the case as is.



The Affirmations Page will display a confirmation message.



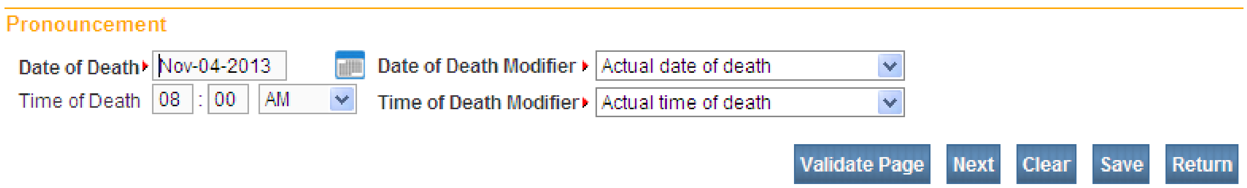
Exercise 4.10 – Pronouncement

Skill Learned: How to complete the date and time of death and the date and time death modifiers.

Funeral practitioners complete the Medical Certification pages when the medical certifier is not an EDRS user. The funeral practitioner will obtain the information from the medical certifier, key the data into the registration pages, scan the paper death certificate, and attach it to the record.

Note: All information keyed into the Medical Certification pages (Pronouncement, Place of Death, Cause of Death, Other Factors and Certify) should be keyed in "exactly" as the medical certifier entered it on the paper death certificate. Contact the medical certifier for any missing data on the medical certifier's paper death certificate.

1. Click the Pronouncement page link to open the Pronouncement page.



2. **Date of Death** will be auto-filled based on the date entered on the **Start Edit New Case** page.

3. Select from the dropdown the **Date of Death Modifier**, **Time of Death Modifier** and **Time of Death** as shown on the medical certifier's paper death certificate.

Note: If the Time of Death is Unknown, key in 99 for hour and 99 for minutes as shown below. The AM/PM/Military indicator will automatically change to Unknown.

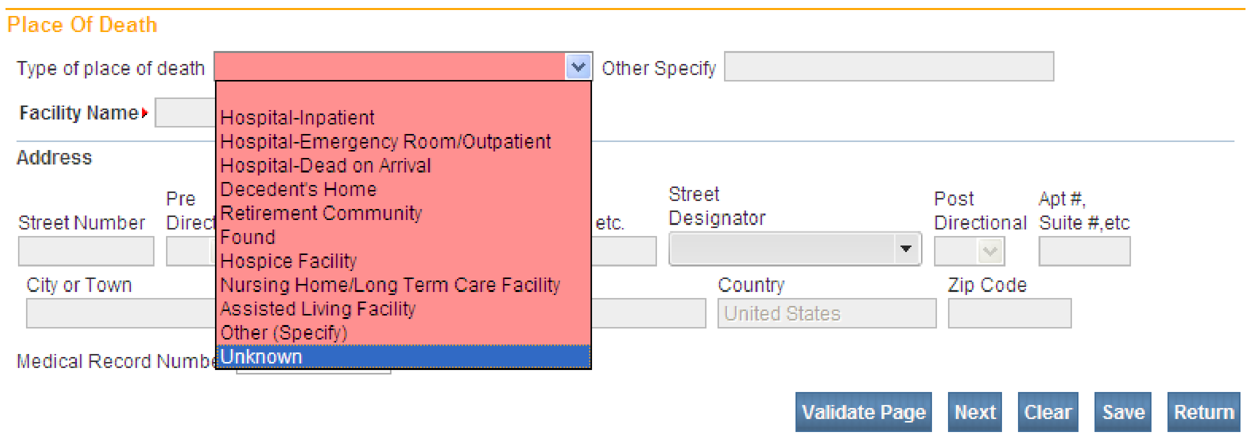
4. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Place of Death** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Home** page.

Exercise 4.11 – Place of Death

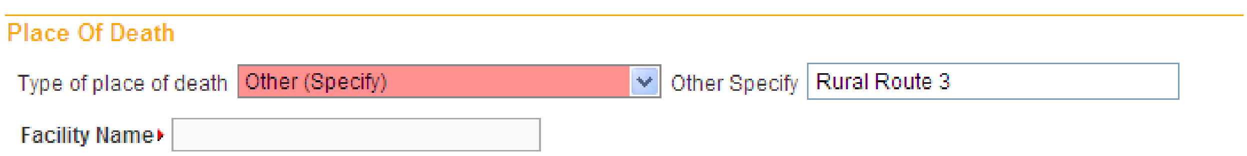
Skill Learned: How to complete the **Place of Death** page.

Note: All information keyed into the Medical Certification pages (Pronouncement, Place of Death, Cause of Death, Other Factors and Certify) should be keyed in "exactly" as the medical certifier entered it on the paper death certificate. Contact the medical certifier for any missing data on the medical certifier's paper death certificate.

1. First, make a selection from the **Type of place of death** dropdown list.



2. If **Other (specify)** is selected as the **Type of place of death**, complete the **Other Specify** field as well.

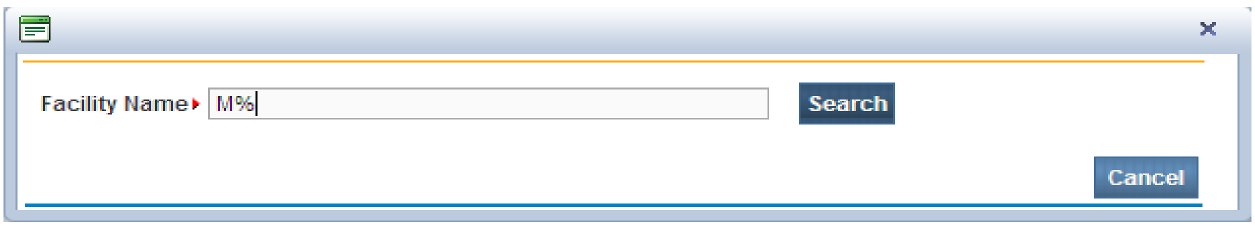


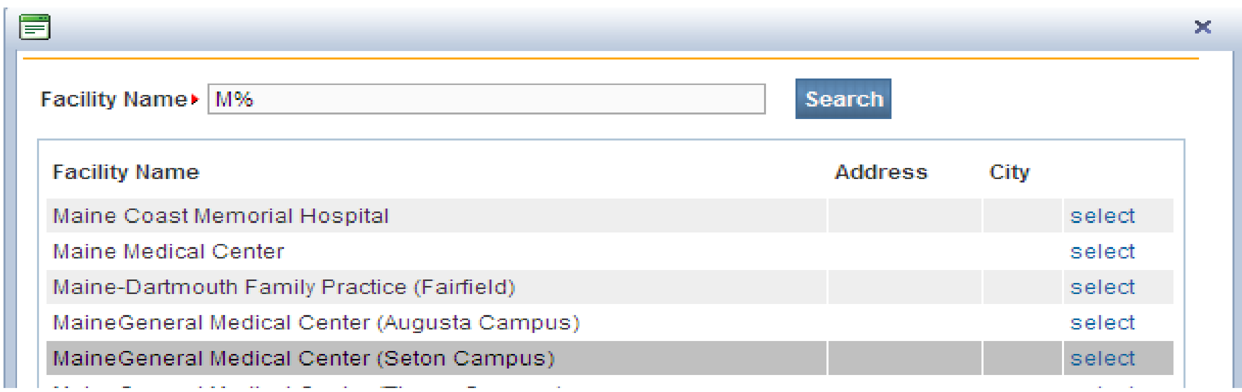
3. Use the **Lookup Place of Death Facility** (LOV) control  to locate and assign the correct facility to the death record.

4. Click on the LOV

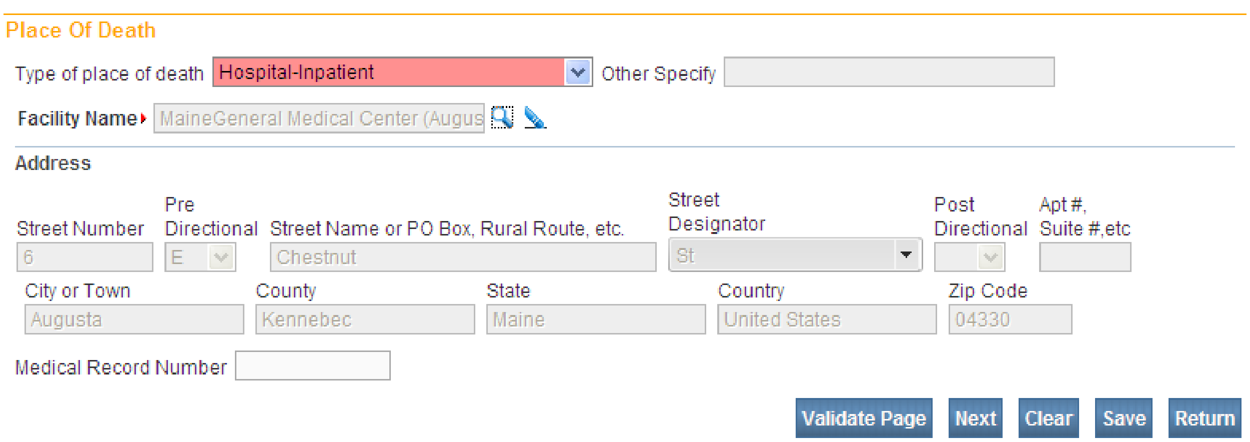
5. Key in the name of the Facility or use a Wild Card (%) to locate the facility. In the example below (M%) will search for all facilities that begin with the letter “M”.

6. Click Search.





7. On the search results page, click on “select” on the same row as the desired facility. The page will auto-fill with the facility selected.



8. Enter the decedent’s **Medical Record Number** in the space provided.

9. 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 **Home** page.

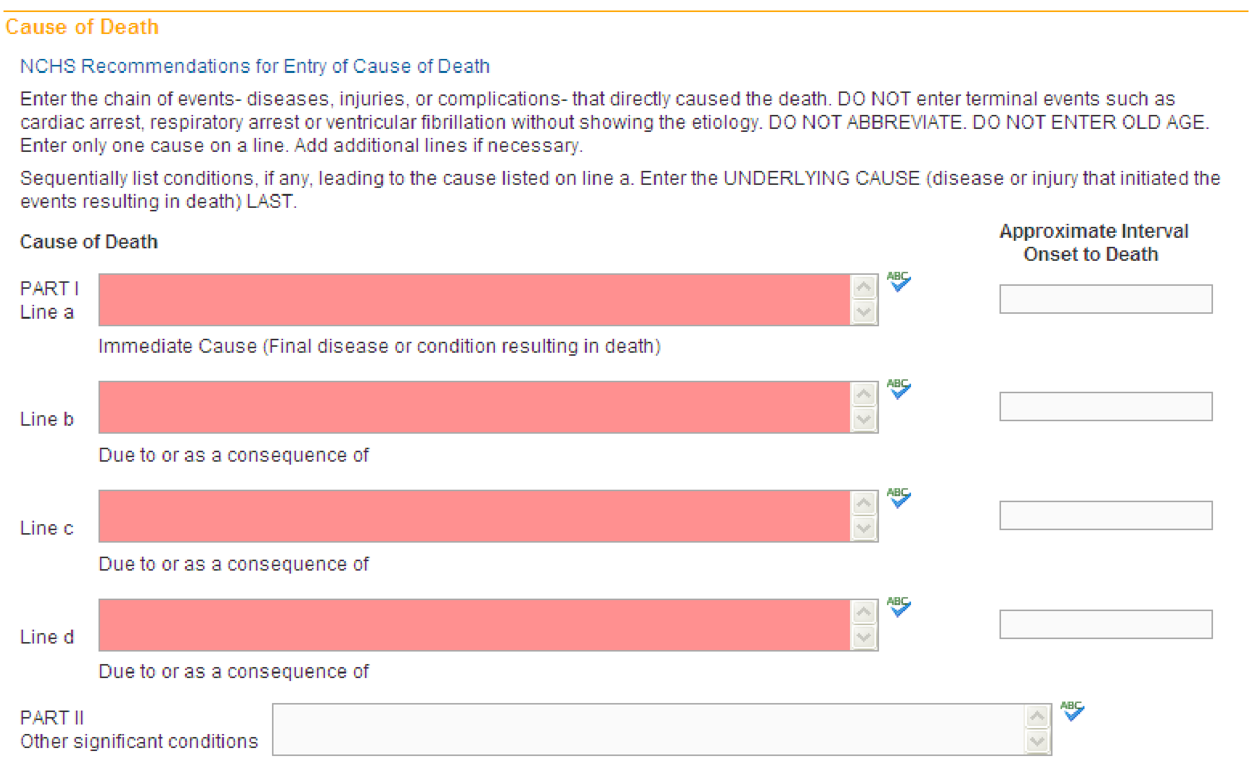
Exercise 4.12 – Cause of Death

Skill Learned: How to complete the **Cause of Death** page.

> **Note: All information keyed into the Medical Certification pages (Pronouncement, Place of Death, Cause of Death, Other Factors and Certify) should be keyed in "exactly" as the medical certifier entered it on the paper death certificate. Contact the medical certifier for any missing data on the medical certifier's paper death certificate.**

> **Note: If the Medical Certifier's paper death certificate shows abbreviations, please type in the abbreviations exactly as written by the Medical Certifier. DO NOT spell out the abbreviations.**

1. The **Cause of Death** page is composed of text boxes used to enter the cause(s) of death, the approximate interval onset to death, and any other contributing factors.



2. Key in the Cause of Death <u>exactly</u> the way the medical certifier has written it on the paper death certificate.

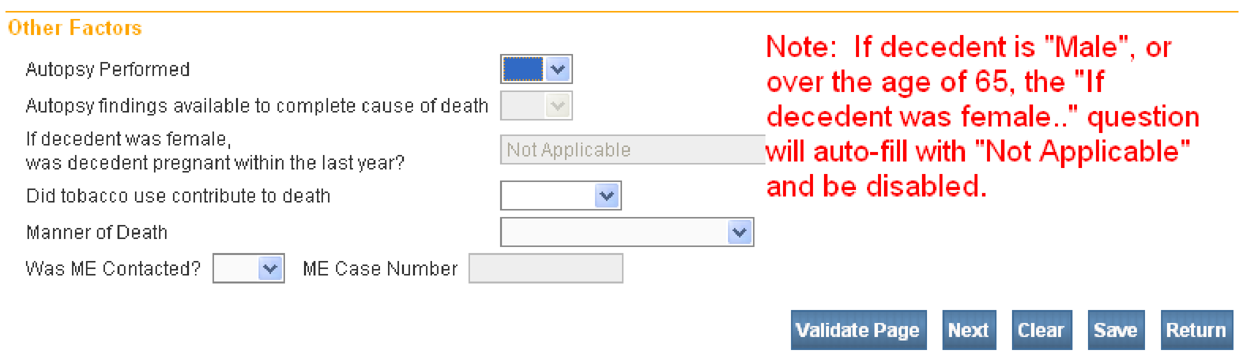
3. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Other Factors** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Home** page.

<u>Exercise 4.13 – Other Factors</u>

Skill Learned: How to complete the **Other Factors** page.

> **Note: All information keyed into the Medical Certification pages (Pronouncement, Place of Death, Cause of Death, Other Factors and Certify) should be keyed in "exactly" as the medical certifier entered it on the paper death certificate. Contact the medical certifier for any missing data on the medical certifier's paper death certificate.**

1. The **Other Factors** page is used to record other data relevant to the death: **Autopsy Performed**, **Tobacco Use, Manner of Death,** etc.



2. Key in the data on the Other Factors page <u>exactly</u> as shown on the paper death certificate from the medical certifier.

> **Note: If the case was referred to a medical examiner, the "Was ME Contacted?" field will be auto-filled <u>once</u> the Medical Examiner has performed a referral action such as "accept", "pending", etc.**

Exercise 4.14 – Certifier

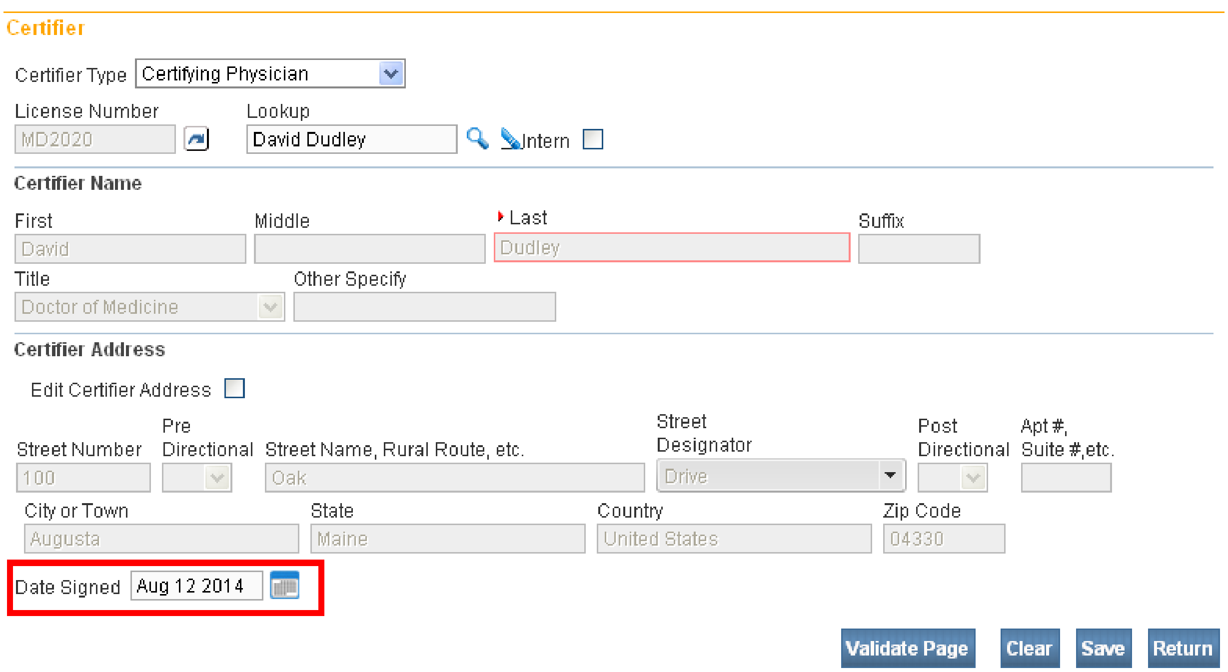
Skill Learned: The **Certifier** page is used to record the name and other data related to the person legally responsible for certifying the decedent's cause of death.

Note: All information keyed into the Medical Certification pages (Pronouncement, Place of Death, Cause of Death, Other Factors and Certify) should be keyed in "exactly" as the medical certifier entered it on the paper death certificate. Contact the medical certifier for any missing data on the medical certifier's paper death certificate.

1. Select the Certifier type from the Certifier Type dropdown.

2. Select the Certifier Name and Certifier Address from the LOV ( ) as shown on the medical certifier's paper death certificate.

3. Key in the Date Signed as shown on the medical certifier's paper death certificate.

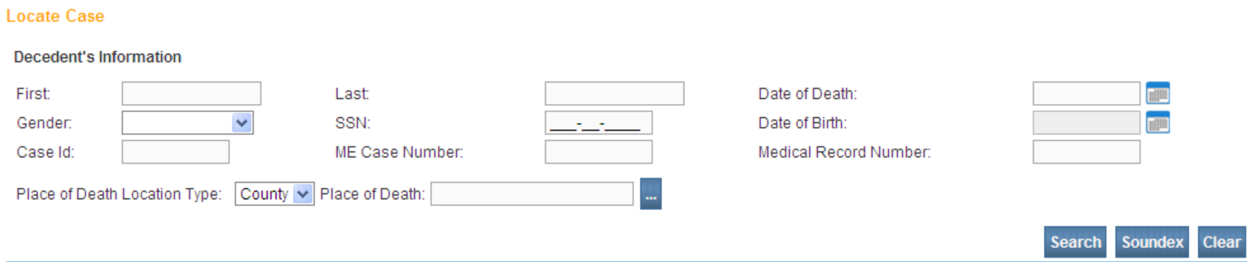


4. Click the **Validate Page** button to check this page for errors, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Home** page.

Exercise 4.15 – Locate Case

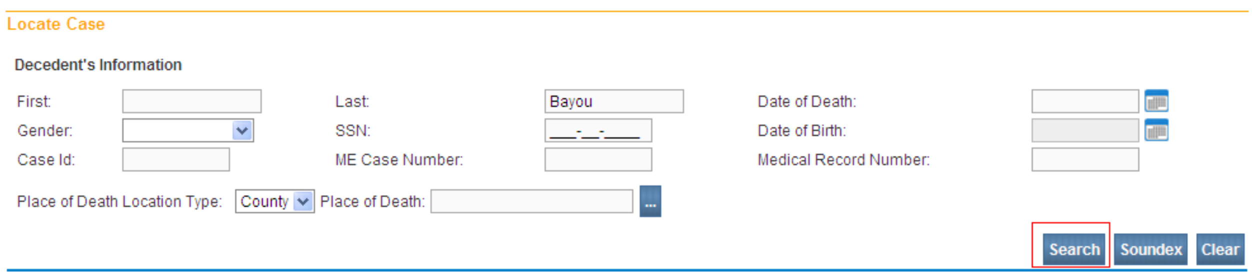
Skill Learned: How data providers such as funeral practitioners, clinicians and medical examiners can use the **Locate Case** page to locate pre-existing cases "**owned**" by the office to which the current user is associated.

1. From the **Home** page, select **Life Events -> Death -> Locate Case**.

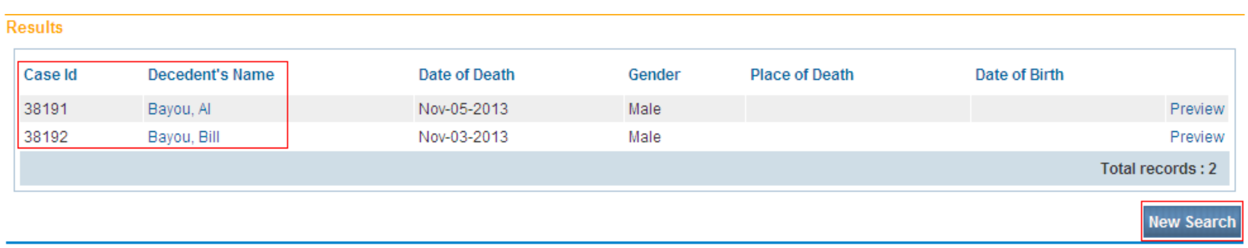


2. The **Locate Case** page offers many different identifiers on which to base a record search. While there are no required fields, as when using the **Start/Edit New Case** page, it is recommended that as much information as possible be included in each search in order to minimize the number of records returned.

3. In the example below, we are searching only on **Last** name. Enter the decedent's last name and click the **Search** button.

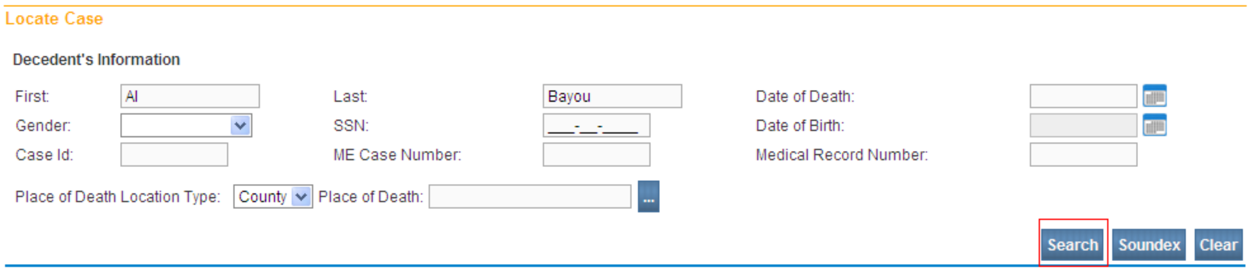


4. Searching on **Last** name returns the following results:

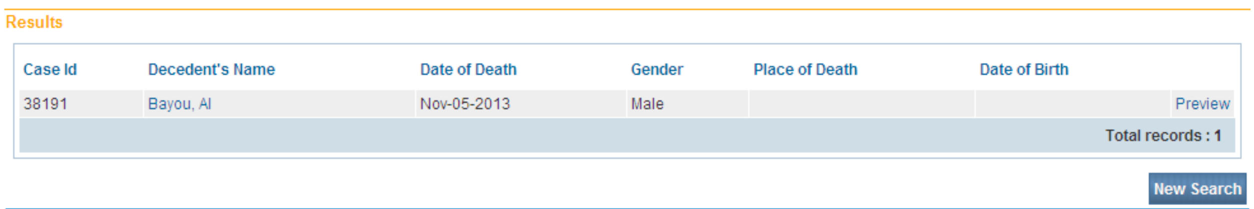


5. Click the **New Search** button in the lower, right-hand corner of the **Results** window.

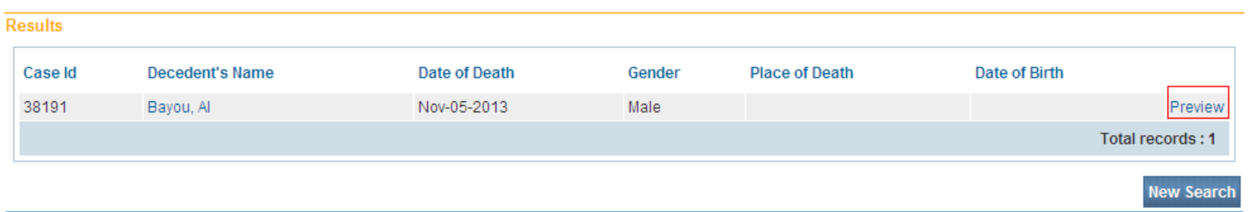
6. For this search, enter both the decedent's **First** and **Last** name, then click the **Search** button.



7. Notice that this search returned only the specific record desired.

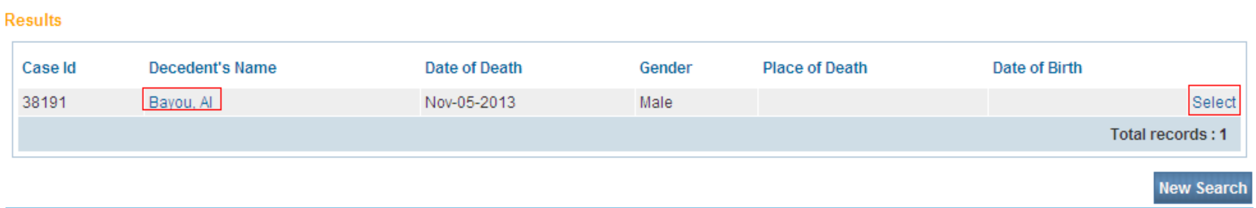


8. Locate and click the Preview link in the far right column of the **Results** window.

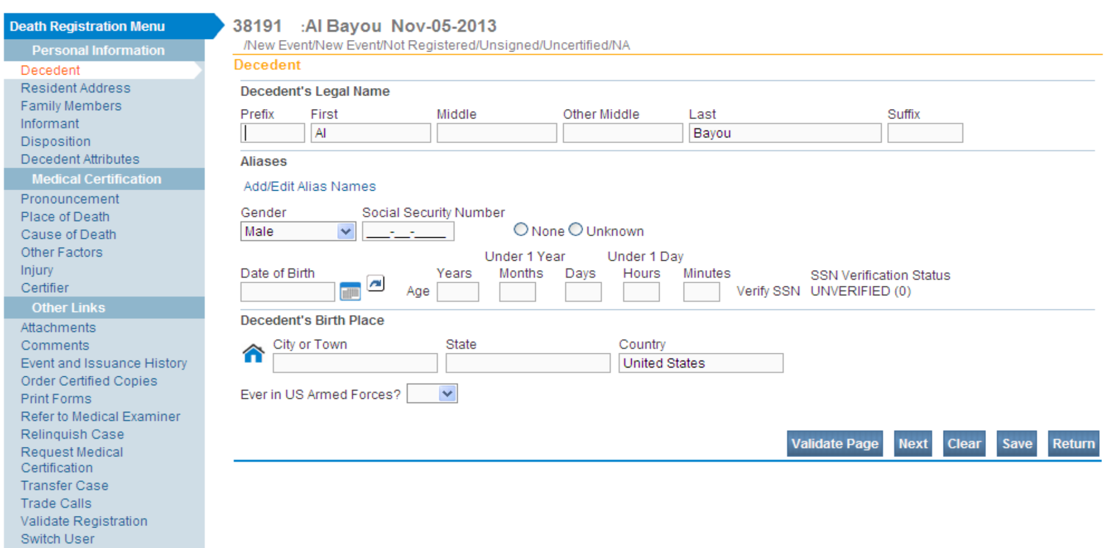


9. Clicking the Preview link will open a preview window offering a brief summary of the selected record.

10. If, after examining the preview pane, you are confident that you have located the desired record, then click the Decedent's Name link or the Select link to open the record.



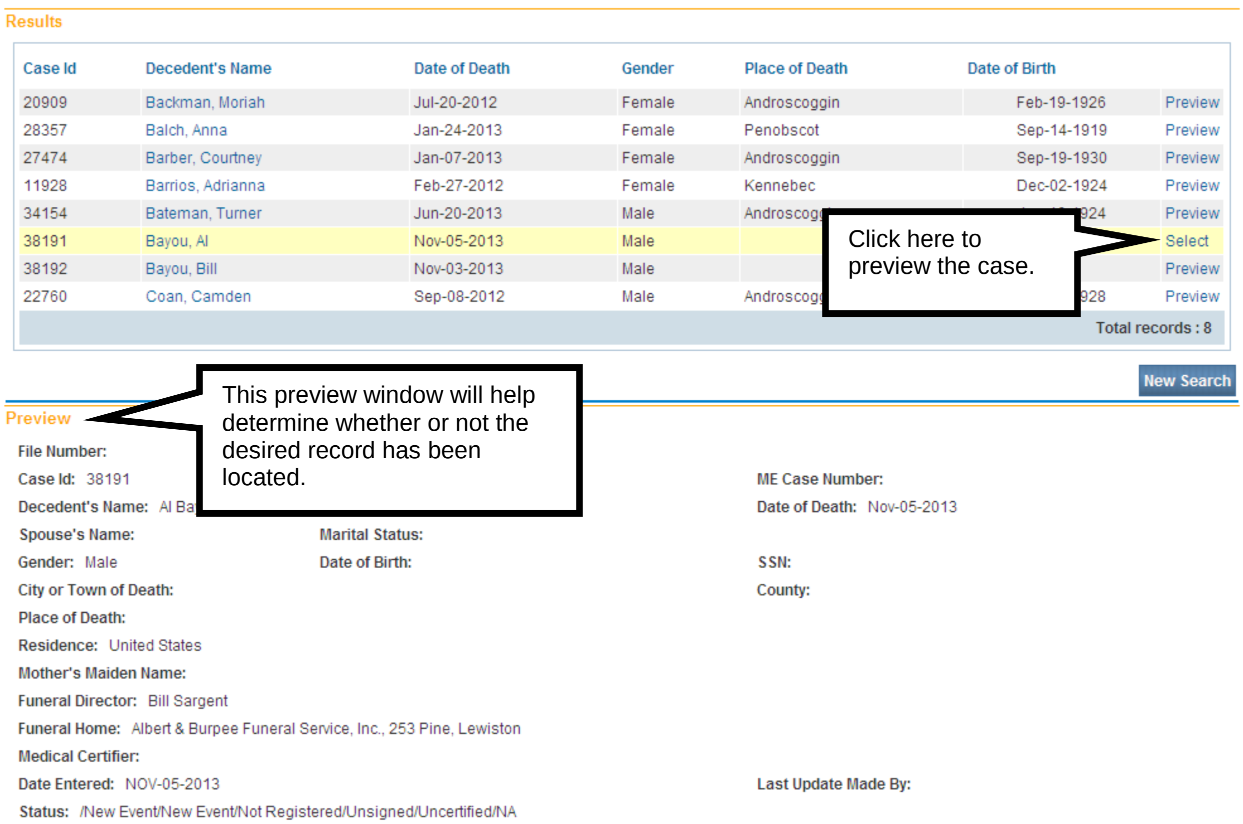
11. With the record open, it can now be reviewed and/or edited.



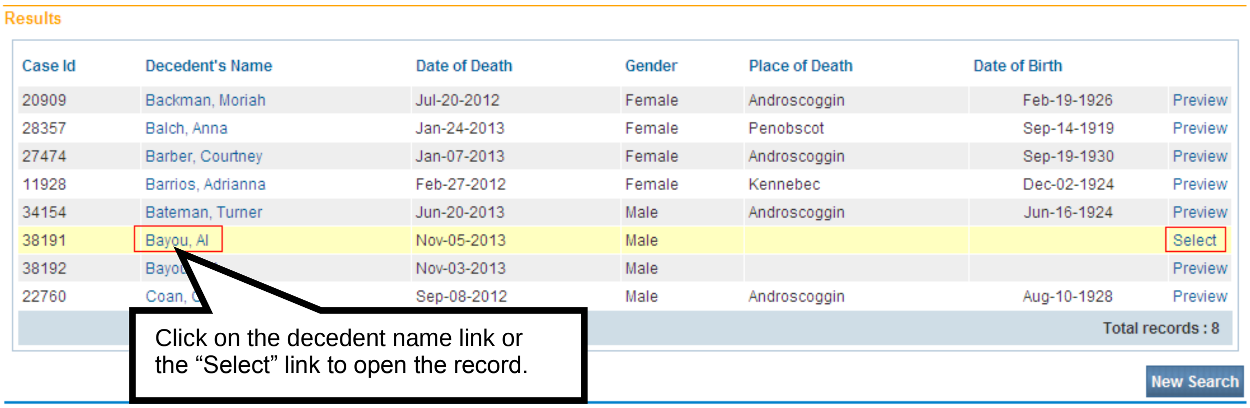
Exercise 4.16 – Preview Case

Skill Learned: How to preview a record prior to opening it.

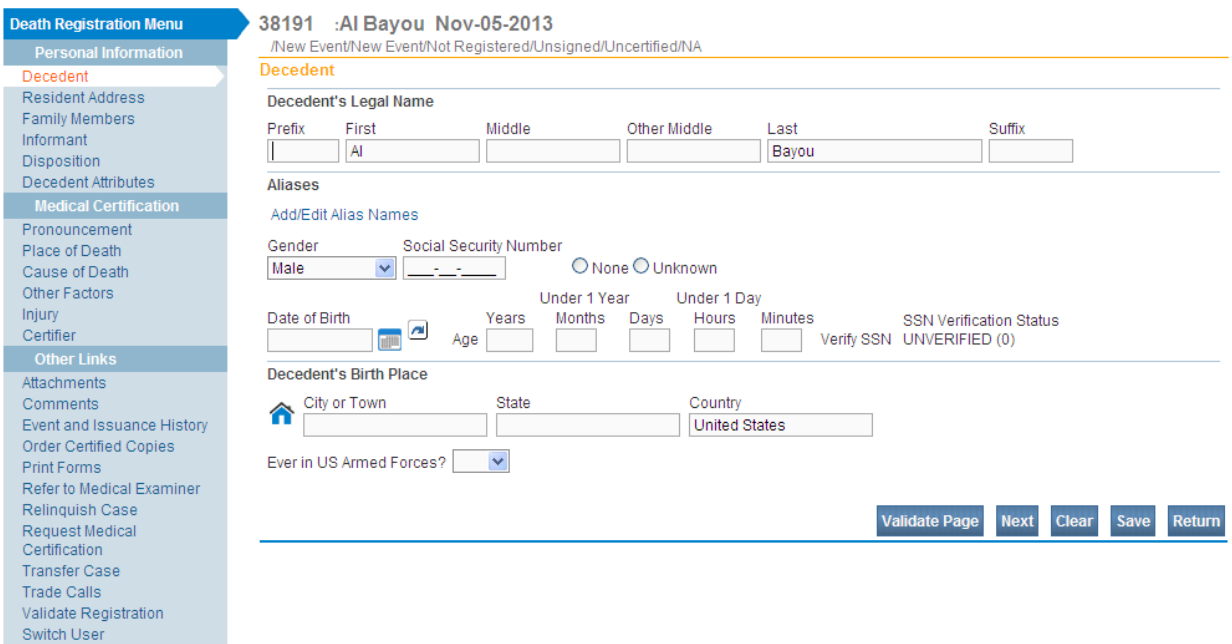
1. Still not sure if you have located the desired record? Simply locate and click the Preview link in any of the search result entries. This will generate a **Preview** page of that particular registration.



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



3. You should now see the **Decedent** page.

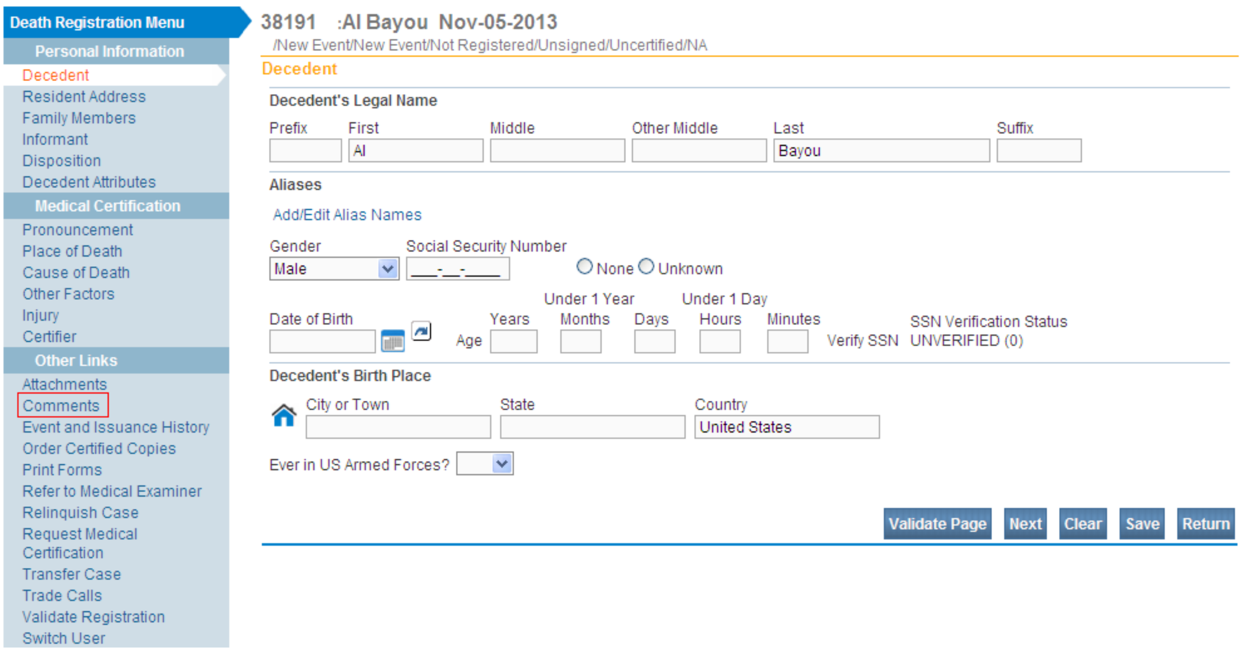


Section 5: Other Links

Exercise 5.1 – Comments

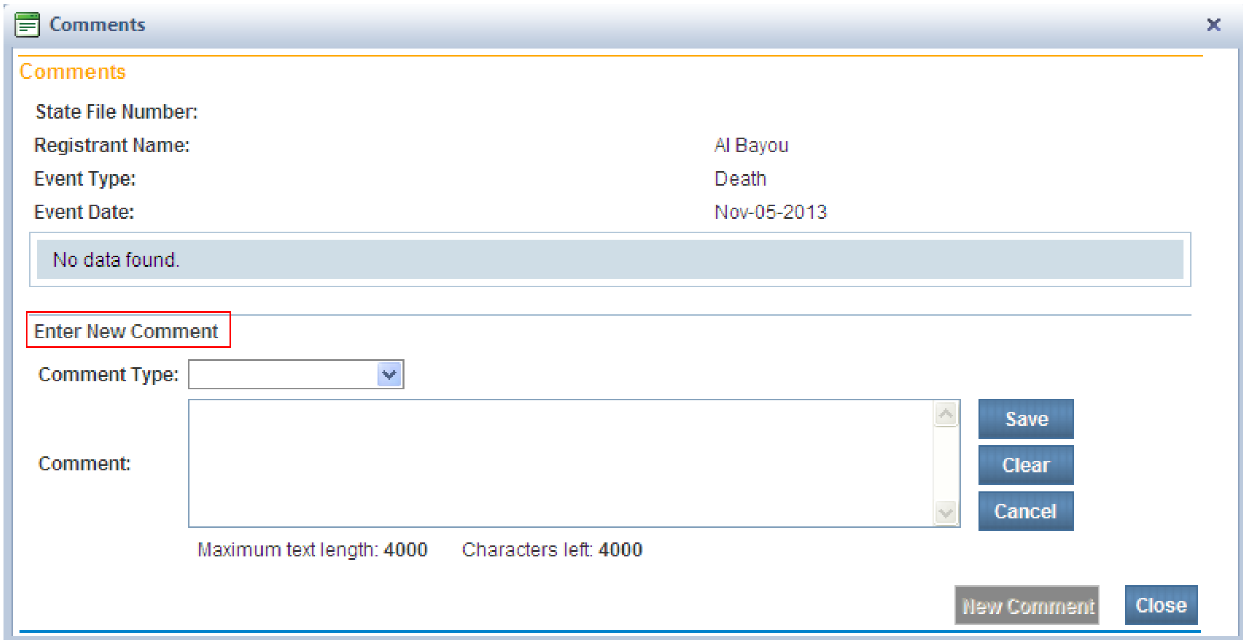
Skill Learned: How to read and enter comments. During the process of entering and registering death records, it is sometimes necessary to store comments or remarks about a case. These comments can serve as reminders or as instructions to others who will work on the case.

1. From the **Death Registration Menu** select **-> Other Links-> Comments.**

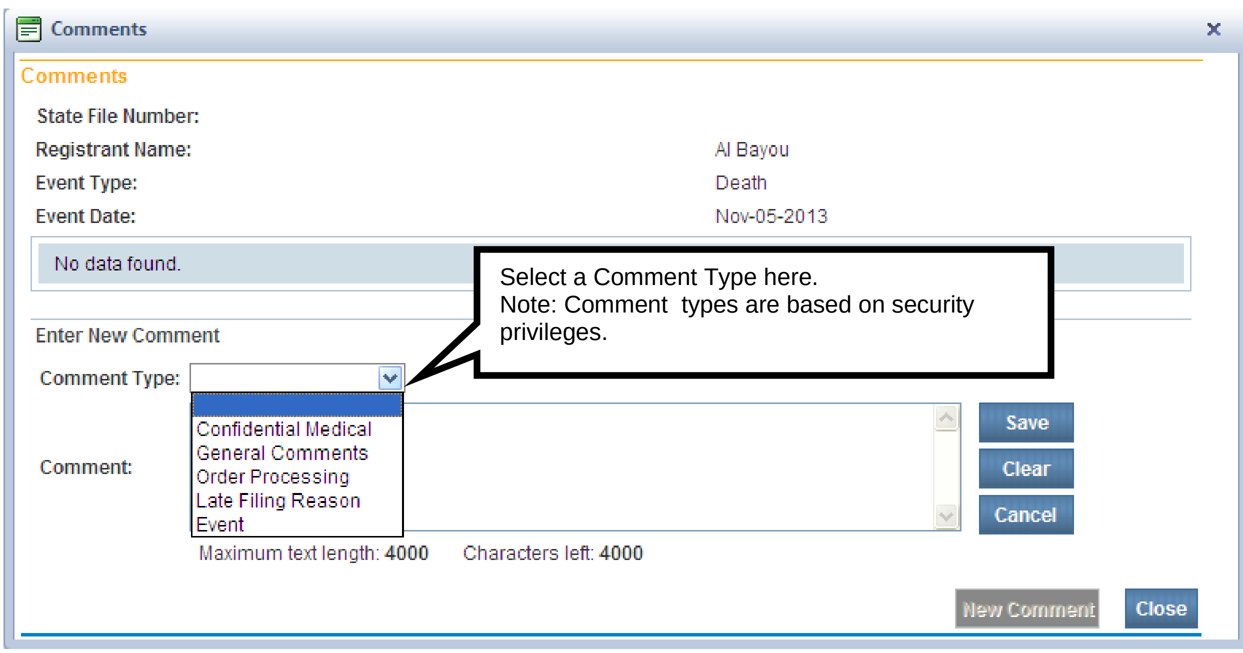


2. The **Comments** dialog will appear onscreen as a pop-up window. To add a new comment, click the **New Comment** button located at the bottom of the **Comments** window.

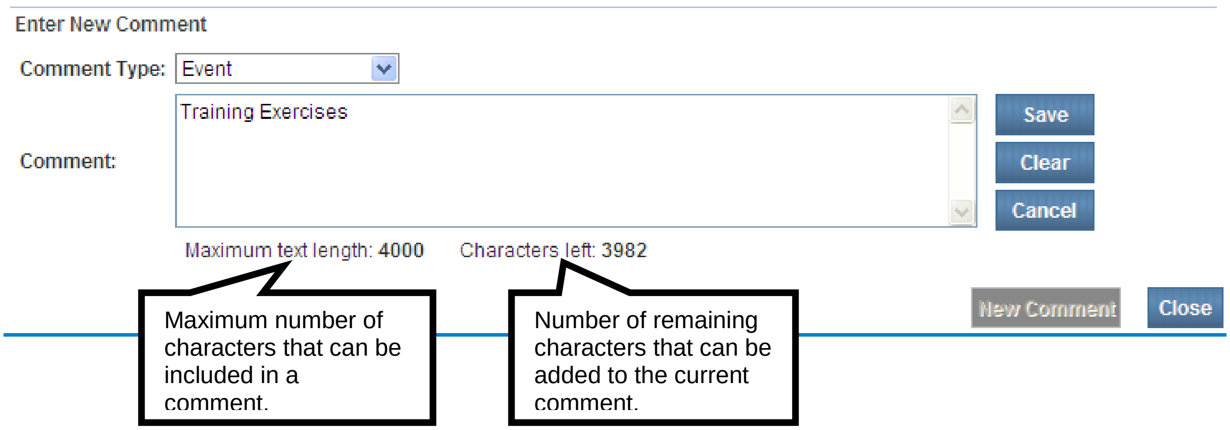
3. The **Enter New Comment** tab will open allowing you to enter new comments.



4. The first step in adding a new comment is to select a **Comment Type**. Every comment must have a type assigned to it.

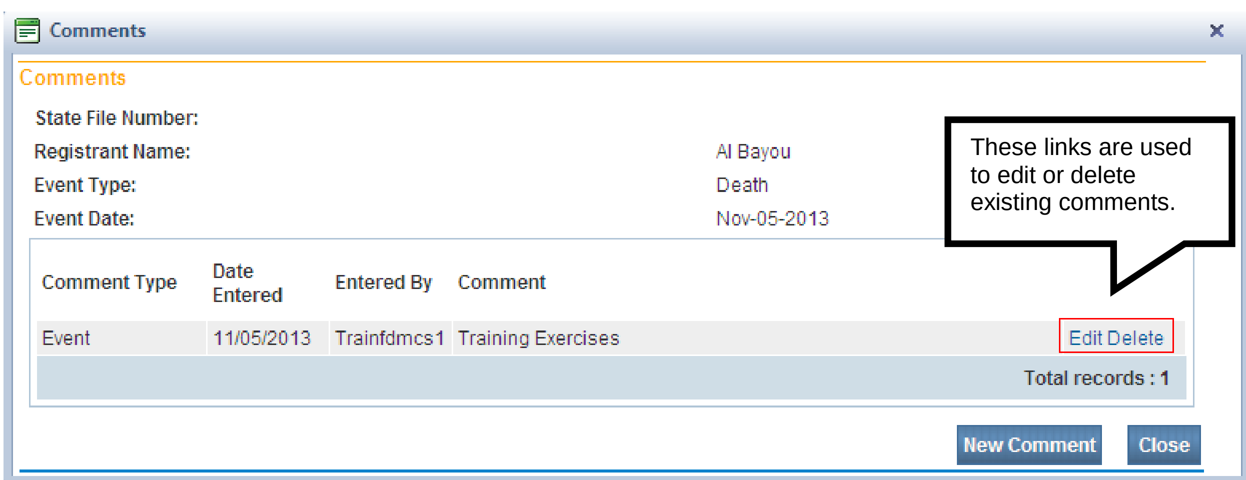


5. Comments are limited to 4000 characters. Fortunately, **DAVE™** keeps track of the number of characters used and displays that information onscreen.

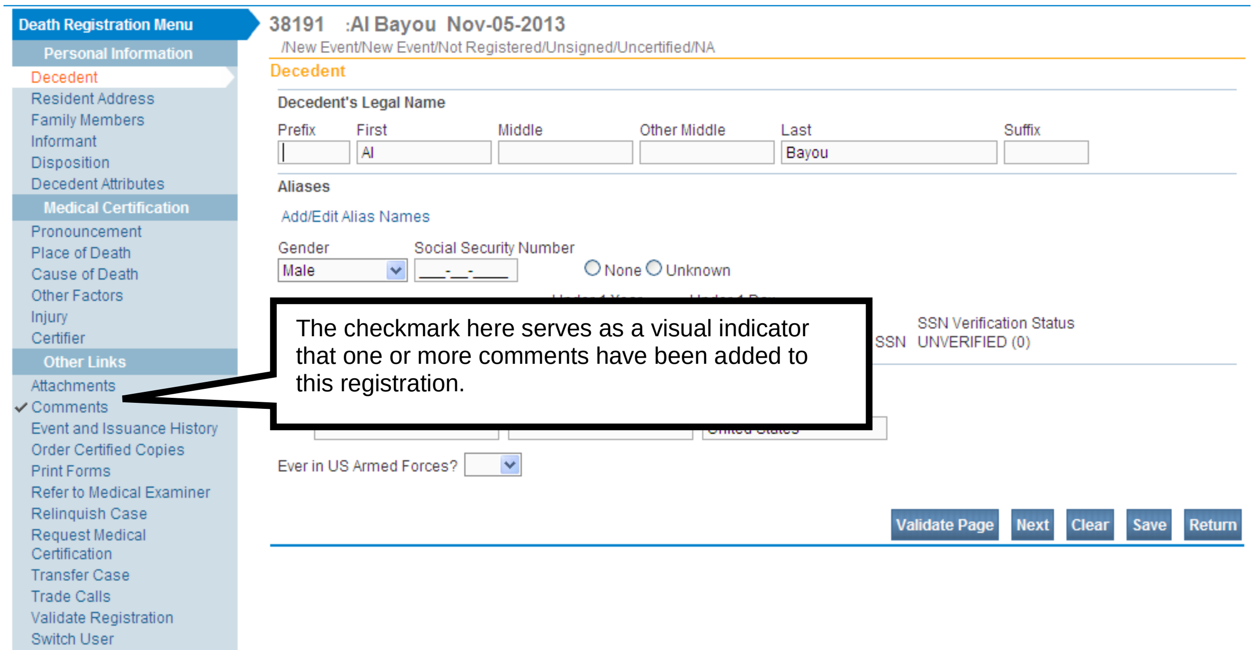


6. When you have finished entering the comment, select the **Save** button to save the comment, **Clear** to clear the entry, or **Cancel** to close the comment window without saving changes.

7. Selecting **Save** above will write the comment to the **DAVE™** database and return you to the main **Comments** window, shown below. Notice that a portion of the comment can be read in the **Comment** window. Lengthy comments will have to be opened in order to be read in their entirety. Clicking the Edit link will open the **Update Existing Comment** tab for you to view and, if necessary, edit the comment.



8. Once a comment has been added to a record, a checkmark will appear next to the **Comments** link. This serves as a visual cue to all users that comment(s) exist on a record.



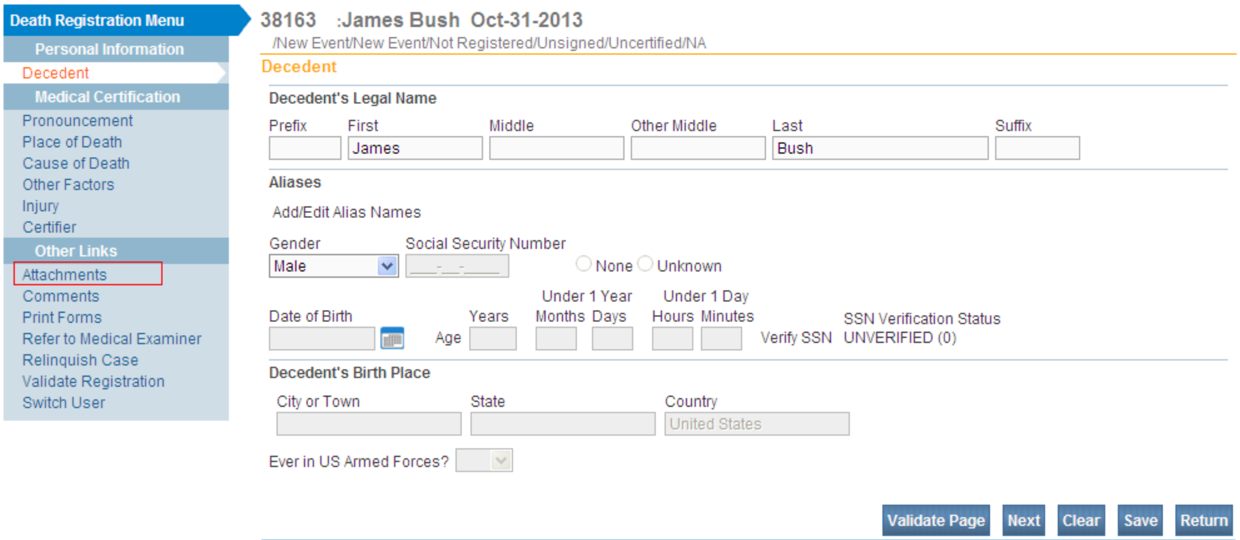
Note: The ability to Edit or Delete comments is determined by the individual user's security configuration.

Exercise 5.2 – Attachments

Skill Learned: How to add attachments. It is sometimes necessary to attach documents to a case. If the attachment is too large, reduce the size of the document in your copier, scan the attachment and save it to your computer file directory prior to attaching the document to the case.

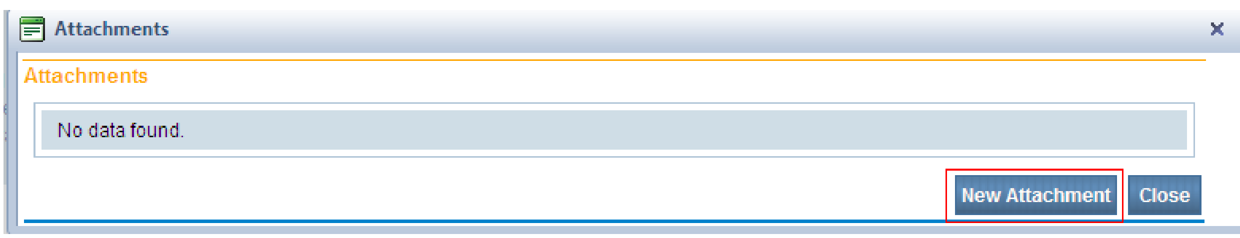
Note: There is a 4MB size limitation on attachments.

1. Scan the document and save it to your computer file directory.
2. Open the case the attachment belongs to.
3. From the **Death Registration Menu** select **Other Links ->Attachments.**



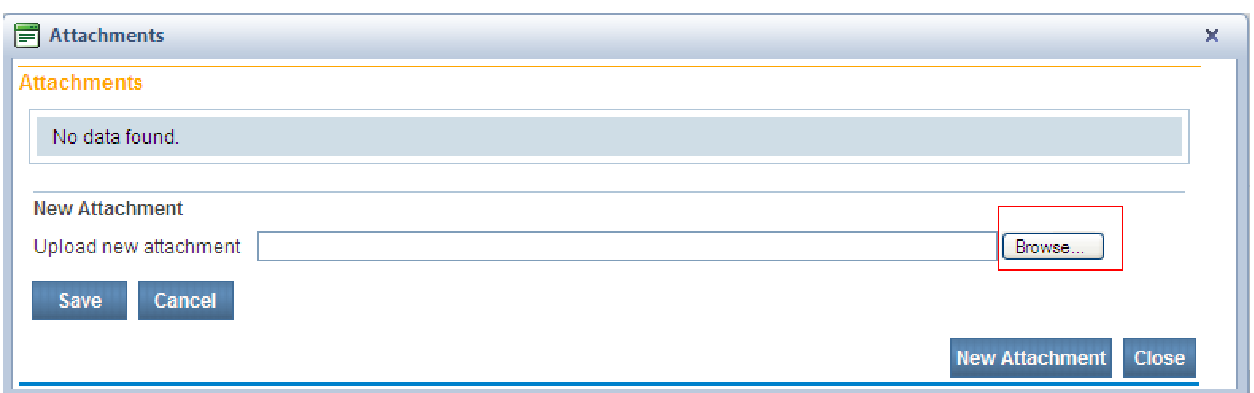
4. The **Attachments** dialog box will open.

5. Select the **New Attachment** button.



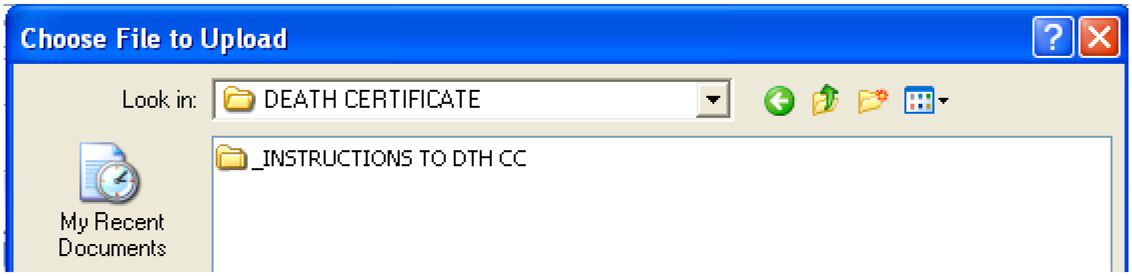
6. The Attachment tab will open allowing you to add an attachment.

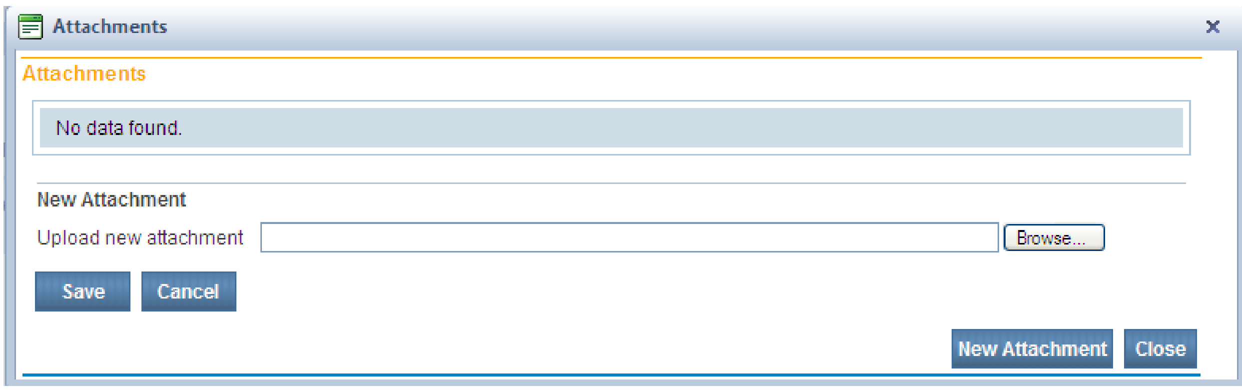
7. Click on the Browse button.



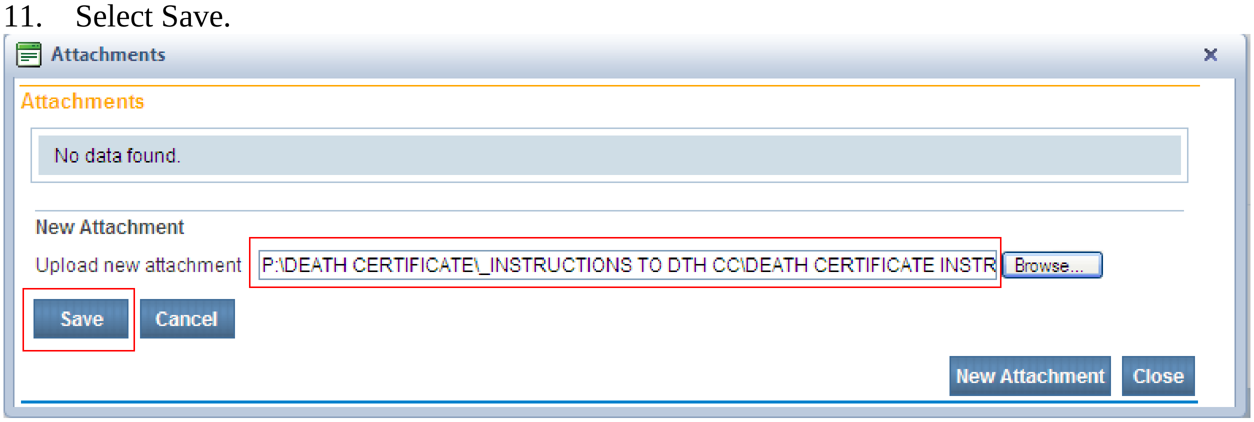
8. Clicking on the Browse button will open the Choose File to Upload directory.

9. Click on the file that needs to be attached to the record.

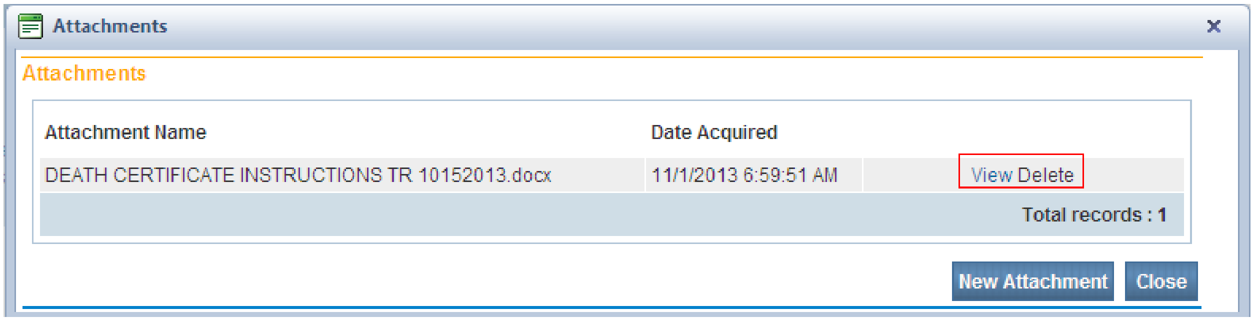




10. The file name will show in the Upload new attachment box.
11. Select Save.



12. Once the file is saved, the attachment can be viewed or deleted. (This is based on user security privileges.)



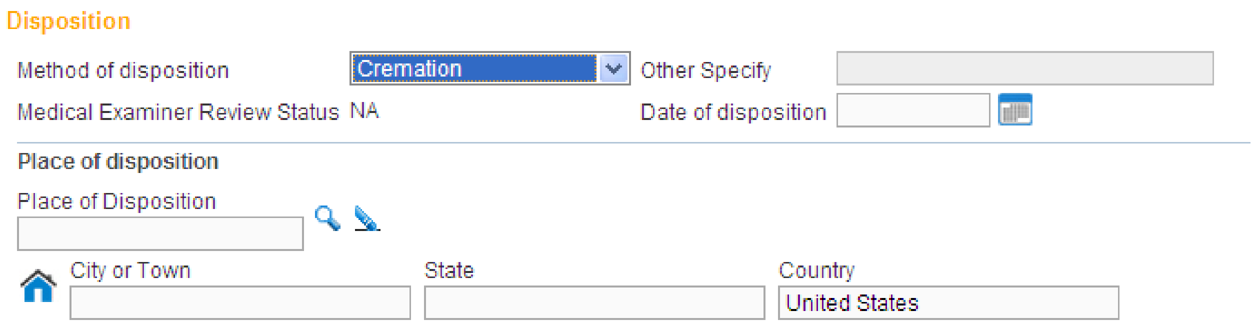
13. A checkmark indicator will be shown in front of the Attachments link when there is an attachment included with the case.

Exercise 5.3 – Cremation Clearance - Funeral Director

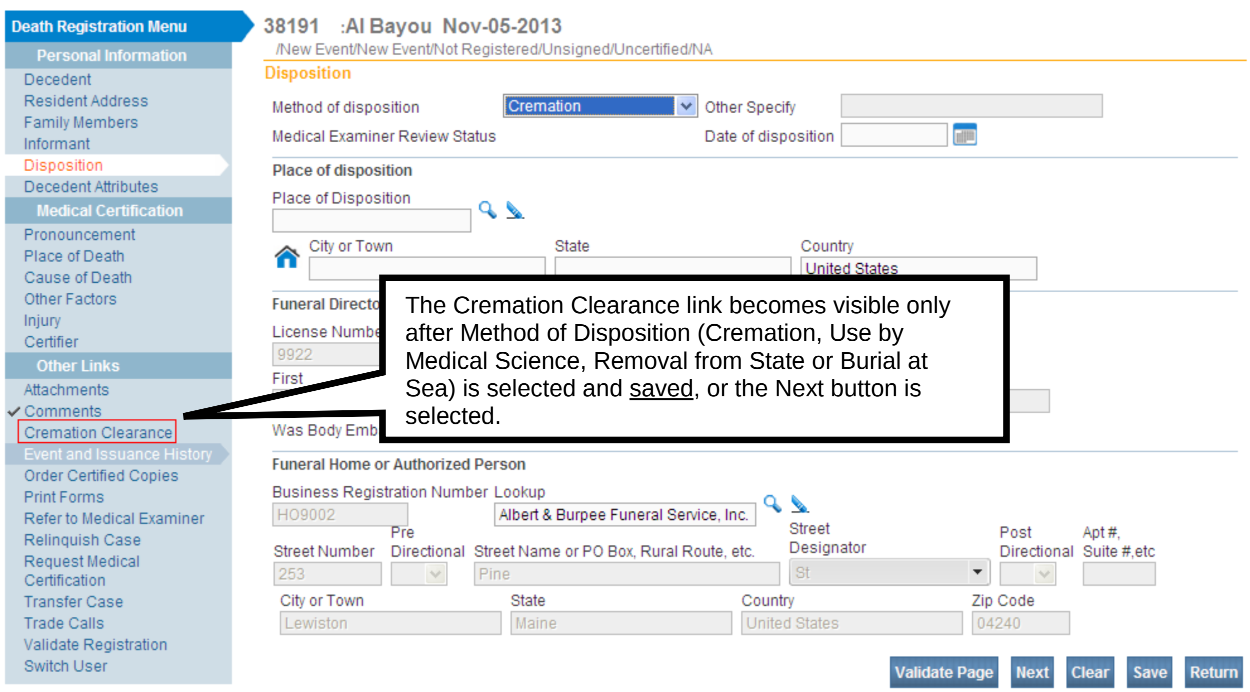
Skill Learned: How to complete the **Cremation Clearance** page from the perspective of a funeral home practitioner.

> **Note: The ability to request a cremation clearance from the medical examiner is determined by the system configuration. This feature may or may not be turned on.**

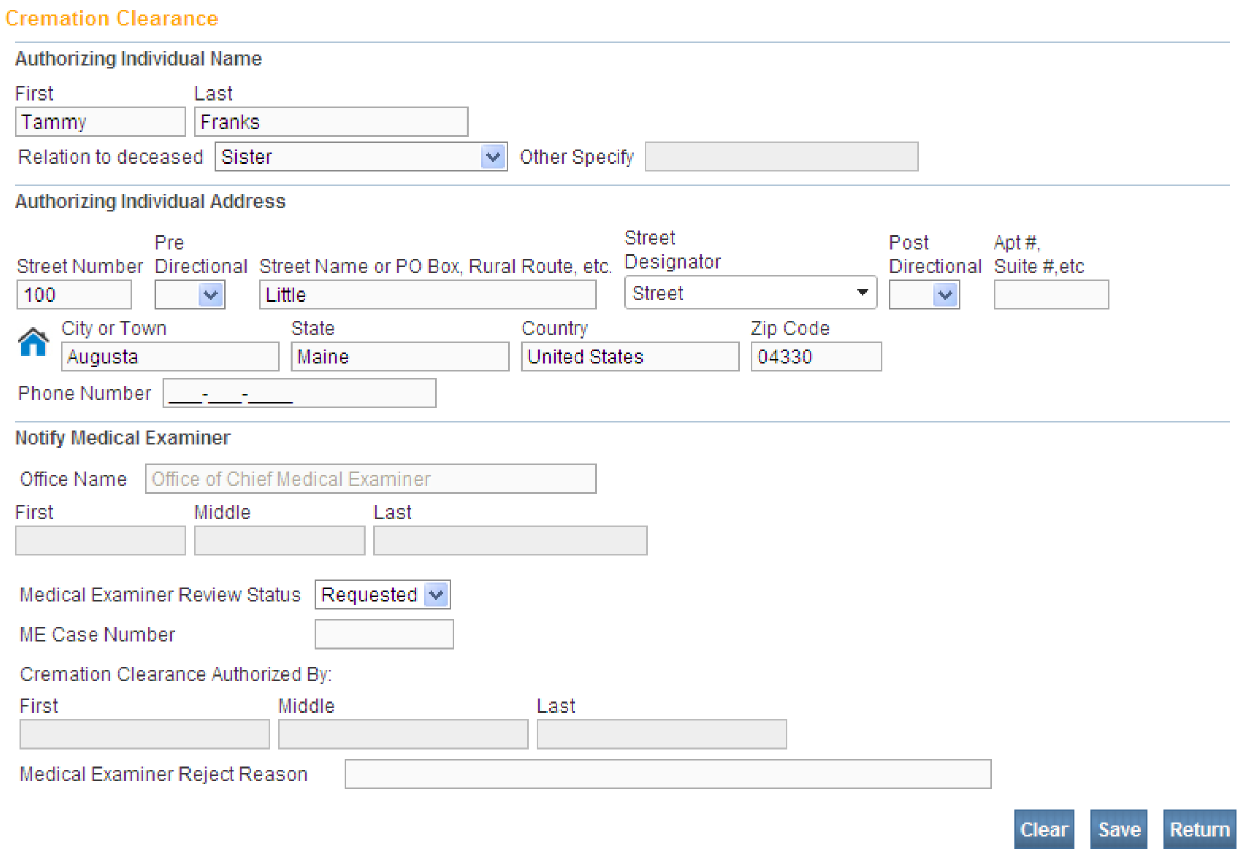
1. Login to **DAVE™** as a funeral practitioner and begin a new case. On the **Disposition** page, select **Cremation** as the **Method of Disposition**.



2. **Save** or click the **Next** button and a new option, "**Cremation Clearance**", will become available from the **Other Links** sub-menu. Click the **Cremation Clearance** link to proceed.



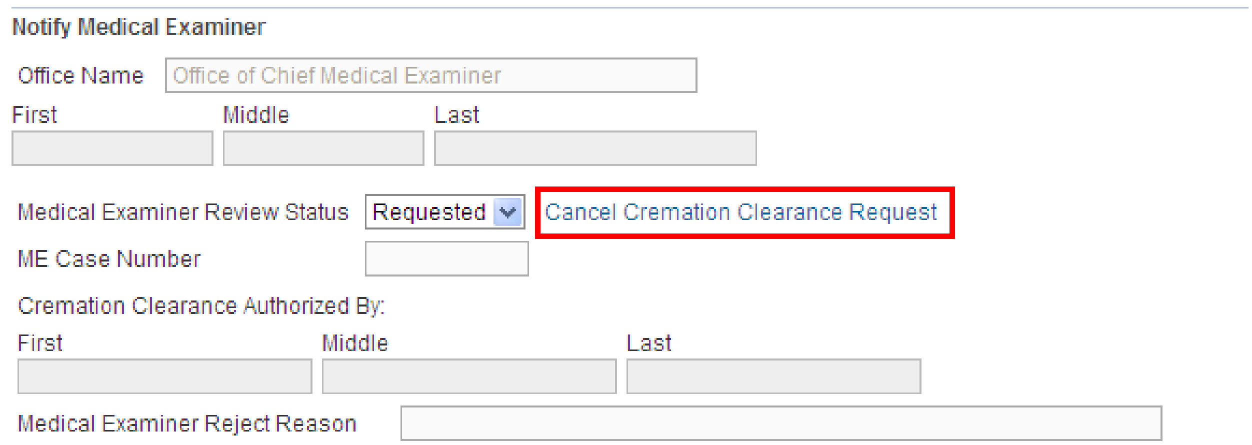
3. The **Authorizing Individual Name** should be the family member or party requesting cremation of the remains. In addition, a selection must be made from the **Relationship to Deceased** dropdown list.



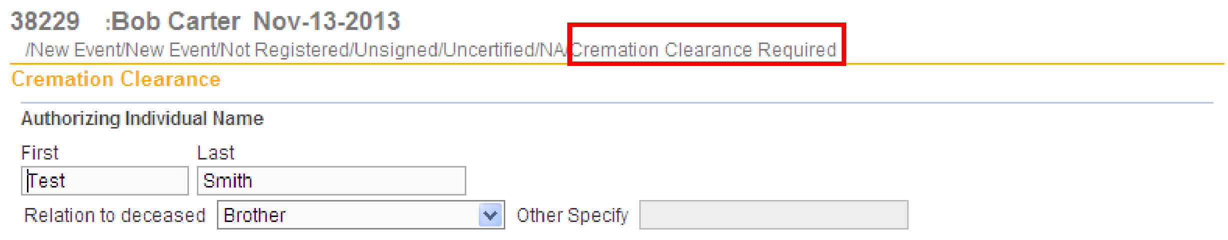
4. Complete the **Authorizing Individual Address** tab and click the **Save** button.

5. The page will refresh and change the **Medical Examiner Review Status** to **Requested**. Additionally, a new Cancel Cremation Clearance Request link will appear onscreen. Clicking this link will cancel this request.

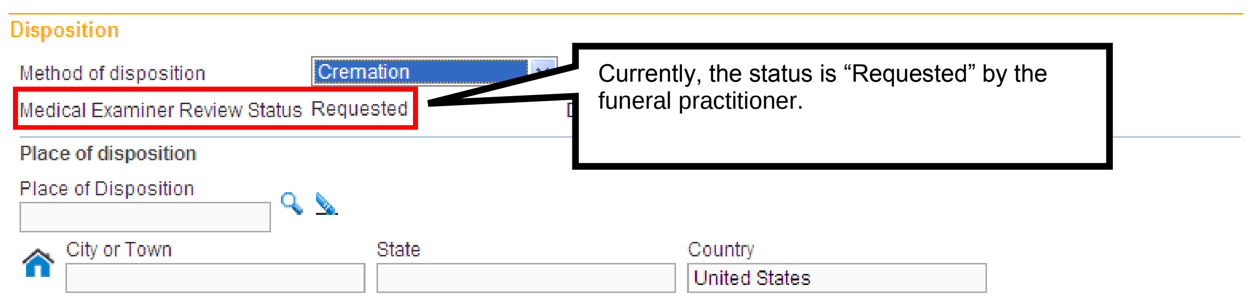
   When the funeral practitioner requests a cremation clearance, the medical examiner will automatically receive an email and an internal message. However, if the funeral practitioner requests a cremation clearance, but decides to cancel the request, the medical examiner will not receive an email and/or internal message. (Please contact the medical examiner if the request is cancelled.)

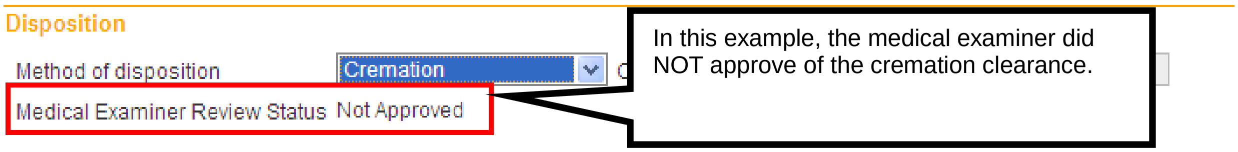


6. The Status bar will indicate that a Cremation Clearance is required. Once the Medical Examiner has selected the “approved” or “pending” status, the “Cremation Clearance Required” will no longer show in the status bar.



7. Click on the Disposition page to check the Medical Examiner Status.





If the Medical Examiner does NOT approve the cremation clearance, both an email and an internal message will be sent to the funeral practitioner.

If the Medical Examiner selects "Pending" an email and internal message is NOT sent to the funeral practitioner.

The funeral practitioner can check the status of the cremation clearance by checking the Medical Examiner Review Status on the Disposition page as shown above.

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

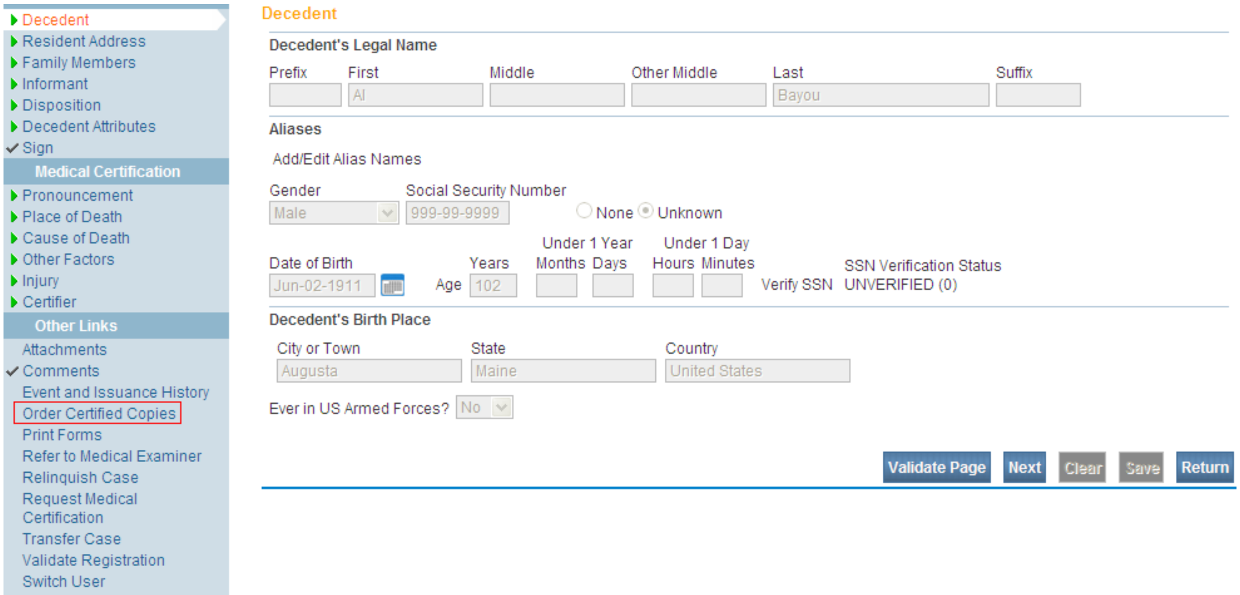
8. Click the **Return** button to return to the **Home** page.

Exercise 5.4 – Order Certified Copies

Skill Learned: How funeral home practitioners may use the Order Certified Copies feature of **DAVE™** to place orders on behalf of their customers.

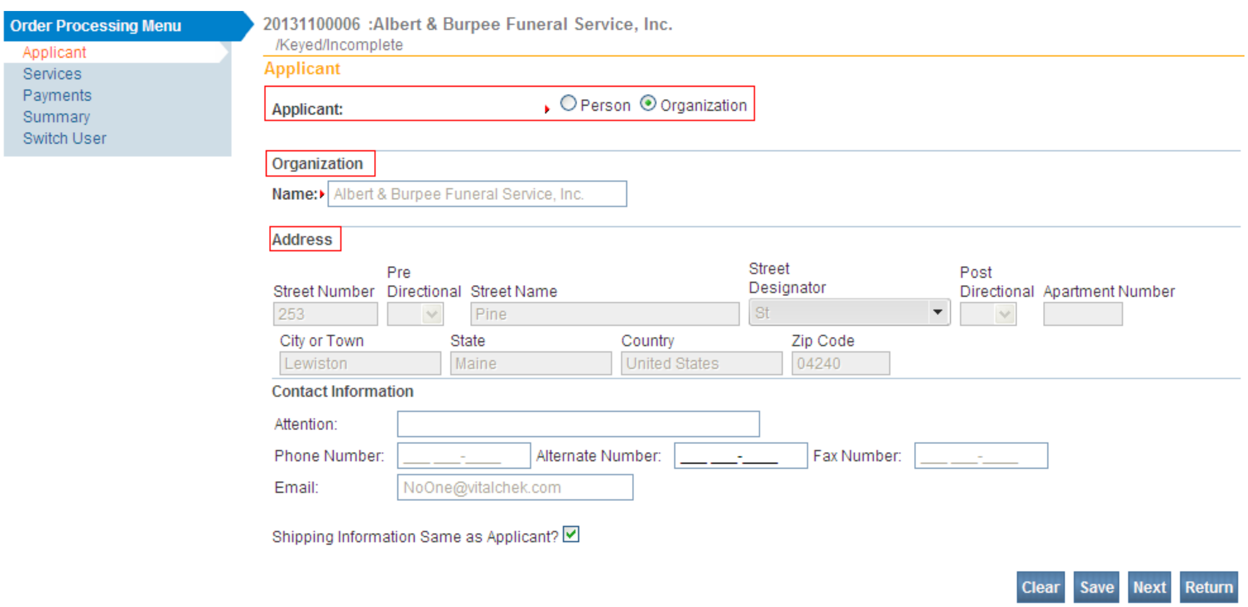
One of the many services offered by funeral homes is the placement of orders for certified copies of death certificates on behalf of their clientele. To facilitate this service, **DAVE™** offers a link exclusively to funeral home users: **Order Certified Copies**.

1. From the **Death Registration Menu** select **Other Links-> Order Certified Copies.**



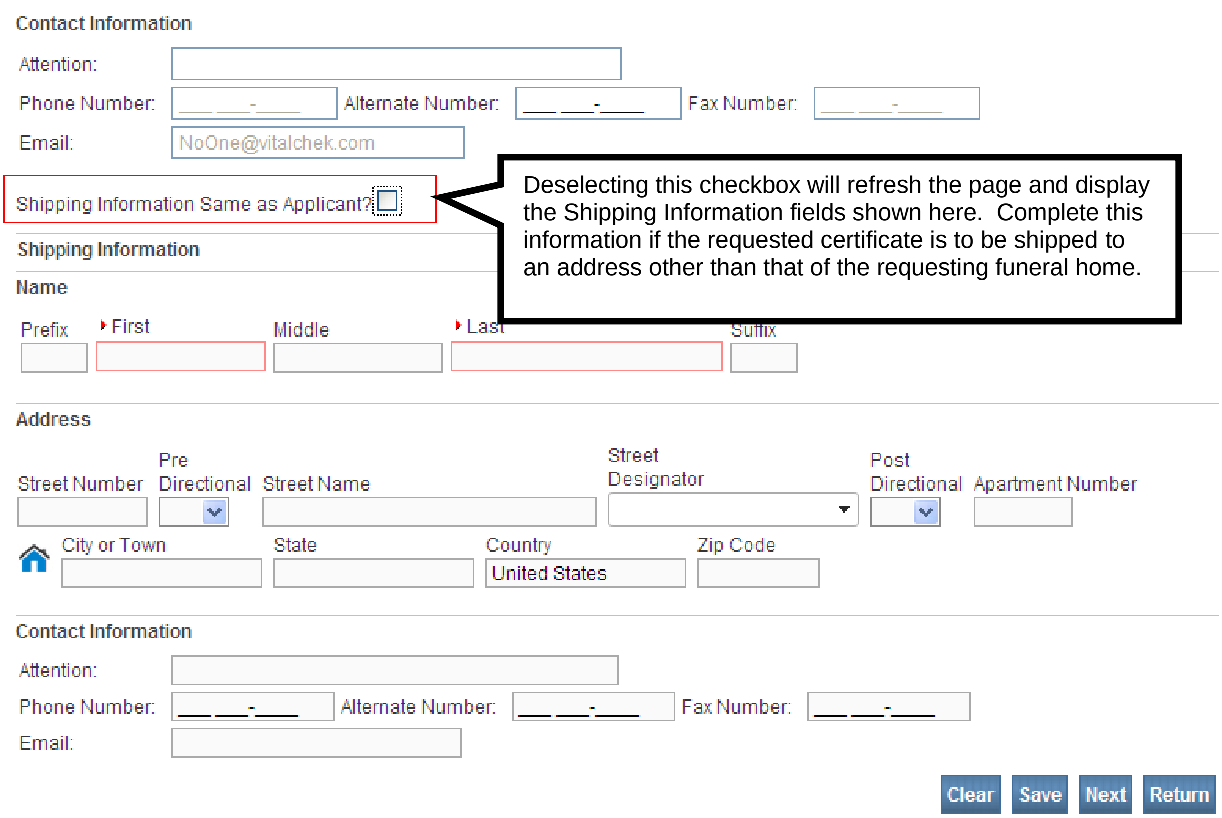
Applicant Page

2. Notice that the **Applicant** page is now displayed and that:
   - the **Applicant** radio button is automatically set to **Organization**,
   - the **Organization** tab is auto-populated with the name of the Funeral Home associated with the current user, and
   - the **Address** tab is auto-populated with the address of the Funeral Home associated with the current user.



3. The **Contact Information** tab contains optional, order-specific contact information such as the person who placed the order and the phone numbers and/or e-mail address at which they can be contacted.

4. By default, requested certificates are mailed to the originating Funeral Home's address on file. However, the **DAVE™** application allows Funeral Homes to request a certificate and have it mailed to the original requestor. This is accomplished by deselecting the **Shipping Information Same as Applicant** checkbox and completing the **Shipping Information** tab that displays. The **Shipping Information** tab is used to capture the third party's **Name**, **Address** and **Contact Information**.



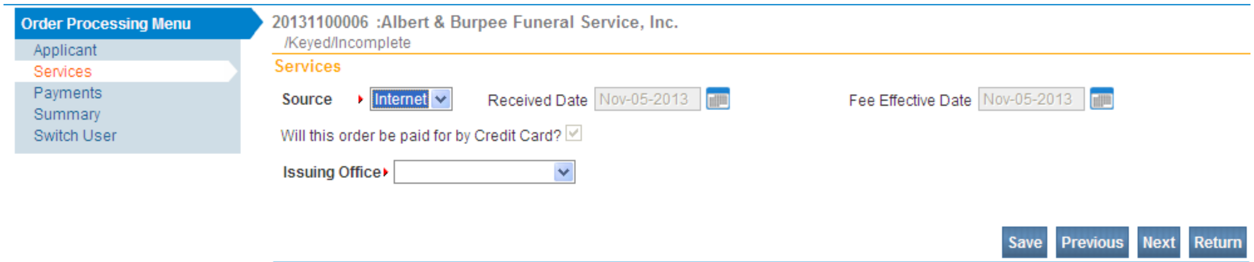
5. Re-select the **Shipping Information Same as Applicant** checkbox to hide the additional **Shipping Information** tab.

6. Locate the navigational buttons located at the bottom of the **Applicant** page and click **Next** to save entries and proceed to the **Services** page.

Services Page

The **Services** page is used to define the type of service requested. This page is also used to describe the source of the application and the office that will issue the certificate.

7. When the **Services** page is loaded, notice that the **Received Date** and **Fee Effective Date** are auto-populated and disabled.

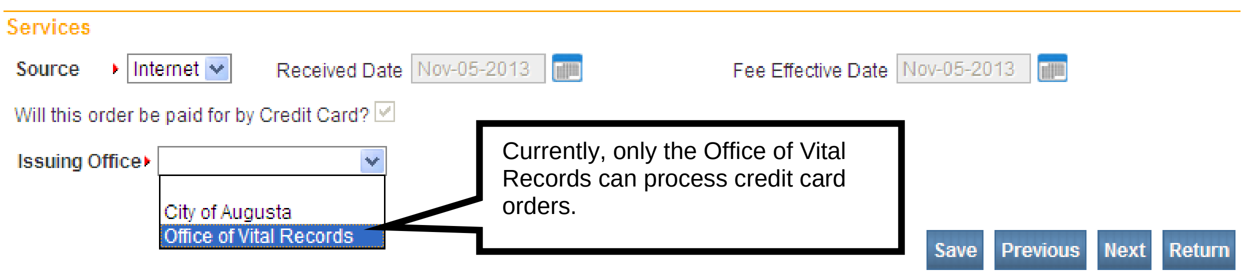


8. Make a selection from the **Source** dropdown list. In this example, Internet has been selected.

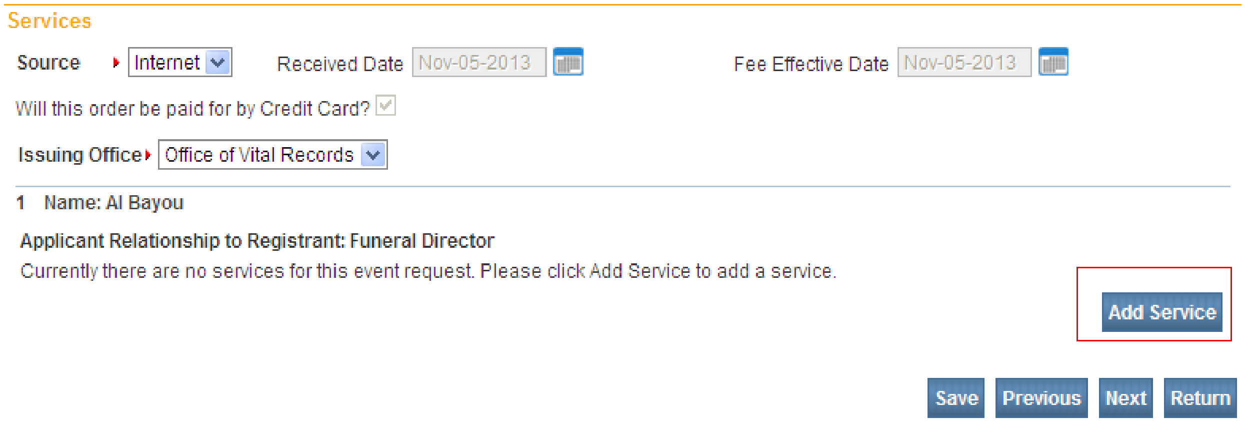
   Please Note: The **Will this order be paid for by Credit Card** checkbox is pre-selected and disabled. Funeral Homes must pay for any services which are ordered online by credit card.

9. Select an Issuing Office for where it is desired to have the services processed as shown below.

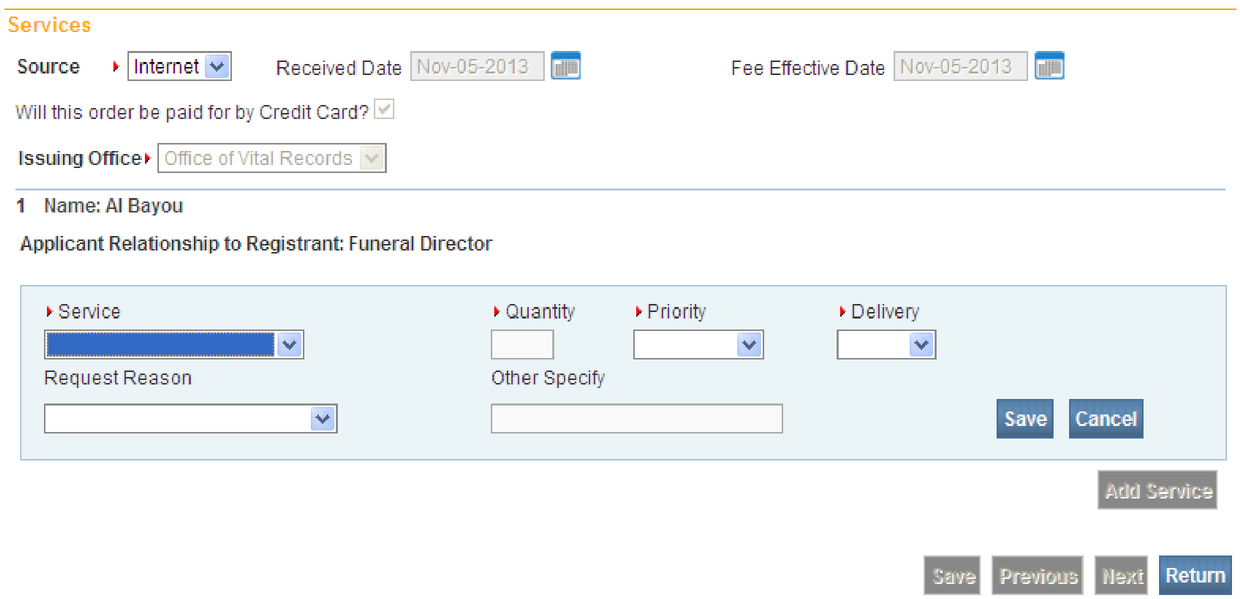
   NOTE: ONLY THE OFFICE OF VITAL RECORDS CAN DO INTERNET/CREDIT CARD ORDERS.



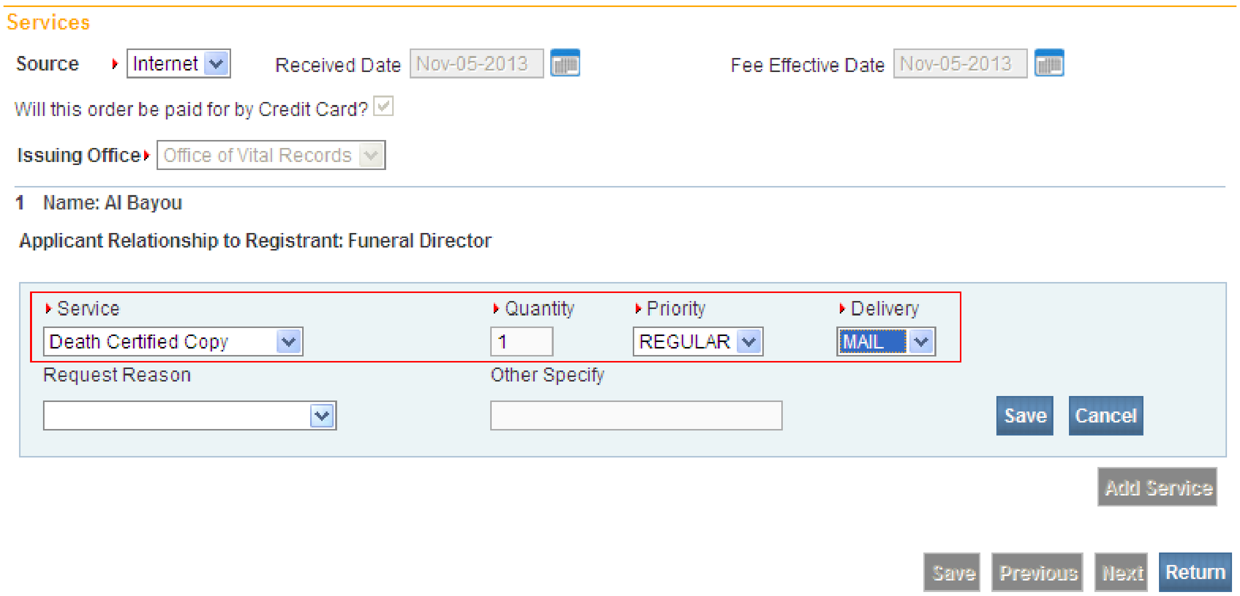
10. The page is redrawn as shown below. Click the **Add Service** button to proceed.



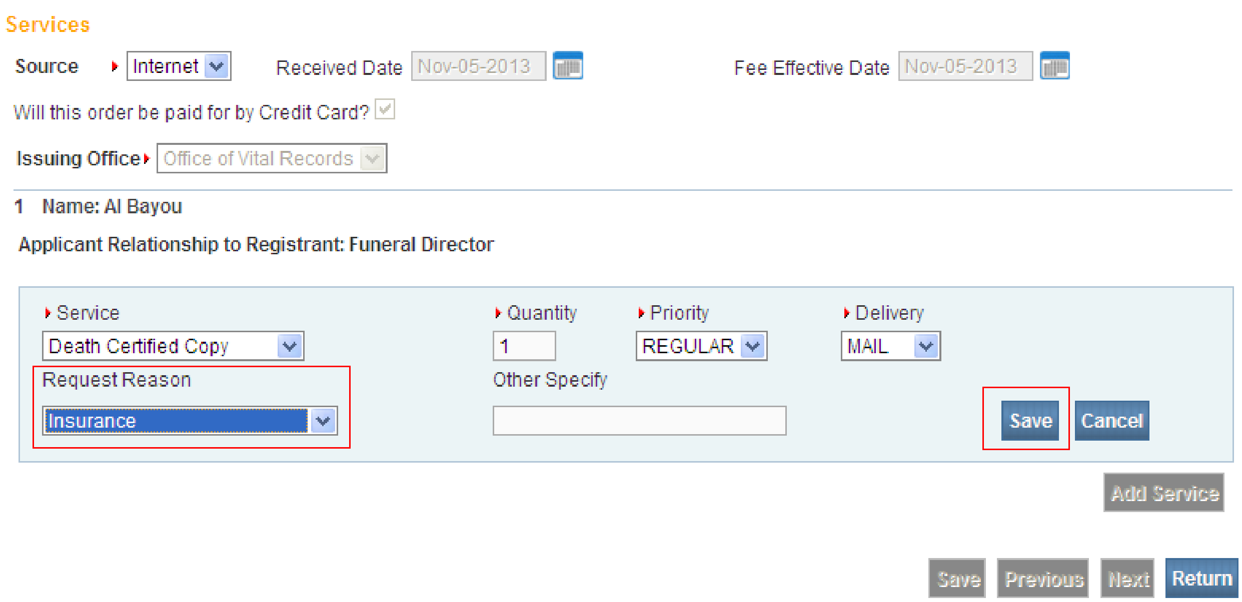
11. The page will refresh and display a new set of fields. From the **Service** dropdown list, select the type of service desired.



12. Continue completing this page by entering a **Quantity** and making selections from the **Priority** and **Delivery** dropdown lists.



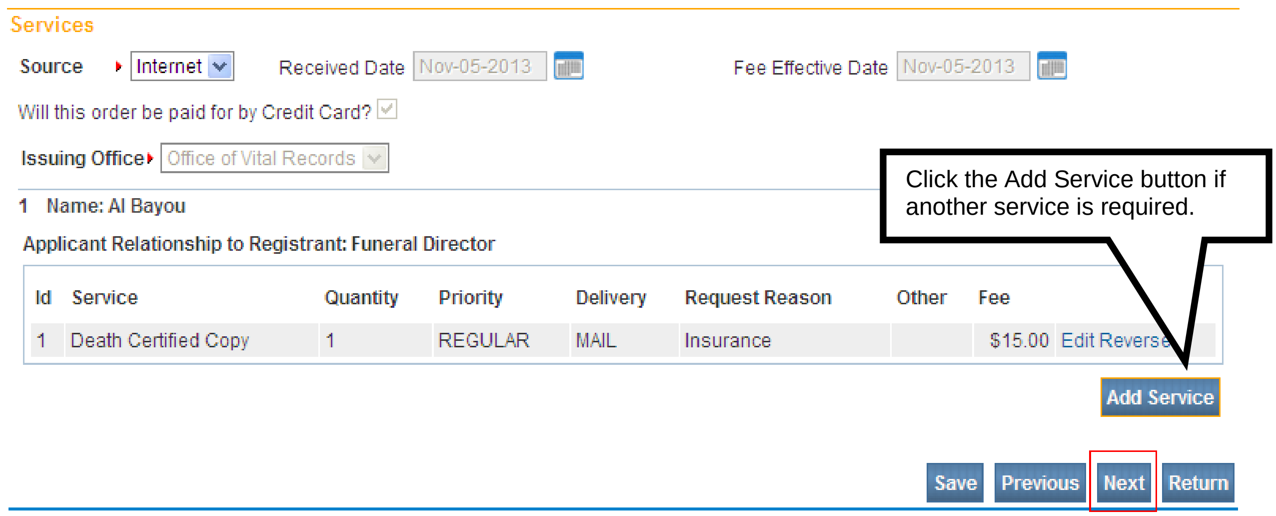
13. Complete the **Services** page by selecting a **Request Reason** and clicking the **Save** button.



14. Again, the page will refresh and replace the various fields with a grid containing the details of this service(s) requested.

    Please Note: Fees may be different; this is only an example.

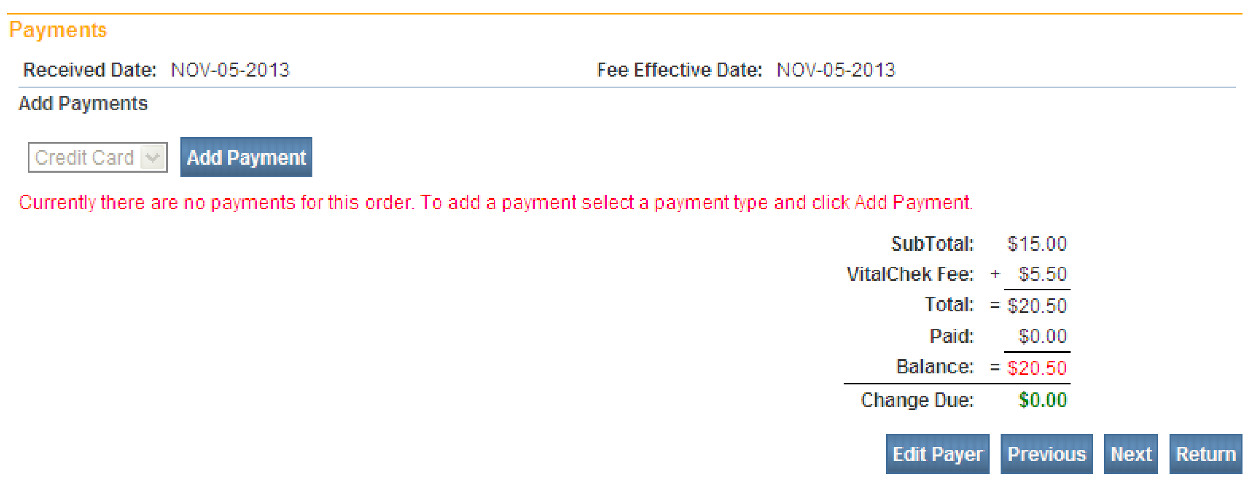
15. Click the **Add Service** button to continue adding services to the order or click the **Next** button to proceed to the **Payments** page.



Payments Page

16. The **Payments** page is used to record the type of payment received and to facilitate payment collection.

Note: Currently, only Credit Card payments are accepted through the Internet.



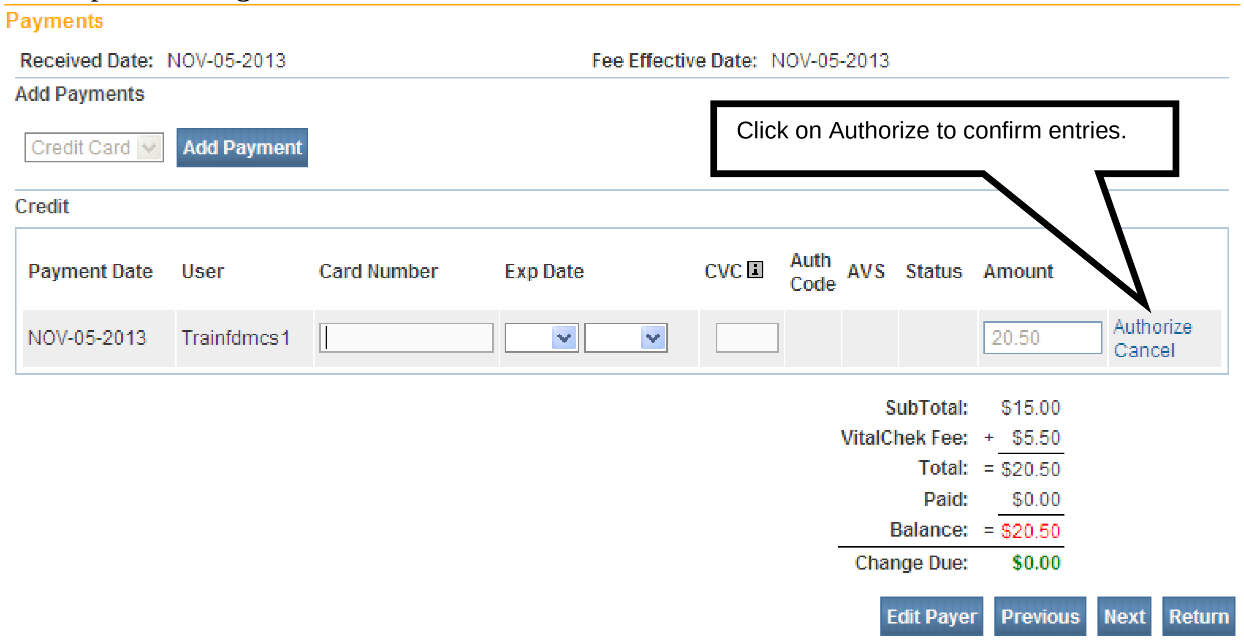
17. Select the **Add Payment** button. The page will be expanded showing the credit data grid.

18. In the **Credit** data grid, enter the applicant's credit card number within the **Card Number** field.

19. Then, enter the credit card expiration date within the **Exp Date** column by selecting the month from the first dropdown list, then the year from the second dropdown list.

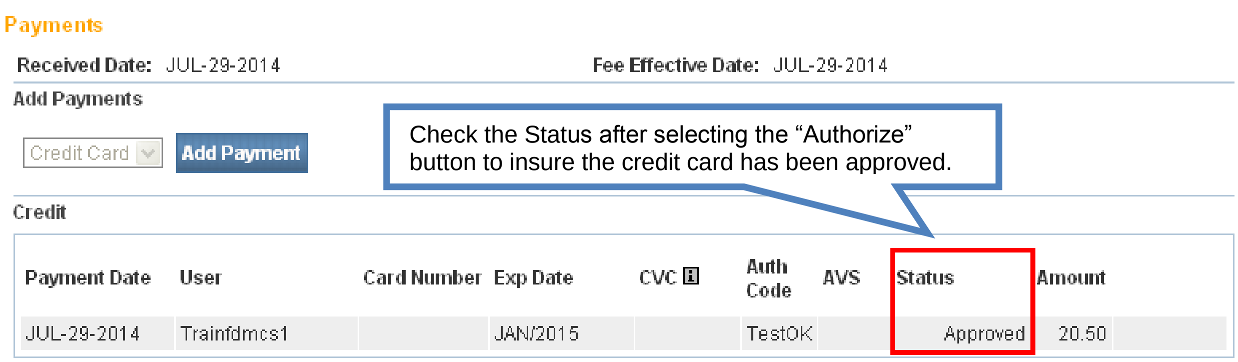
20. Next, enter the **CVC** code that can be found on the back of the credit card.

21. Upon entering the CVC code, select Authorize or Cancel to confirm entries.



Note: The "Authorize" button must be selected. If the authorize button is not selected, the payment will not be recorded.

Once the "Authorize" button is selected, the Status will indicate "Approved" as shown below if the credit card has been approved.

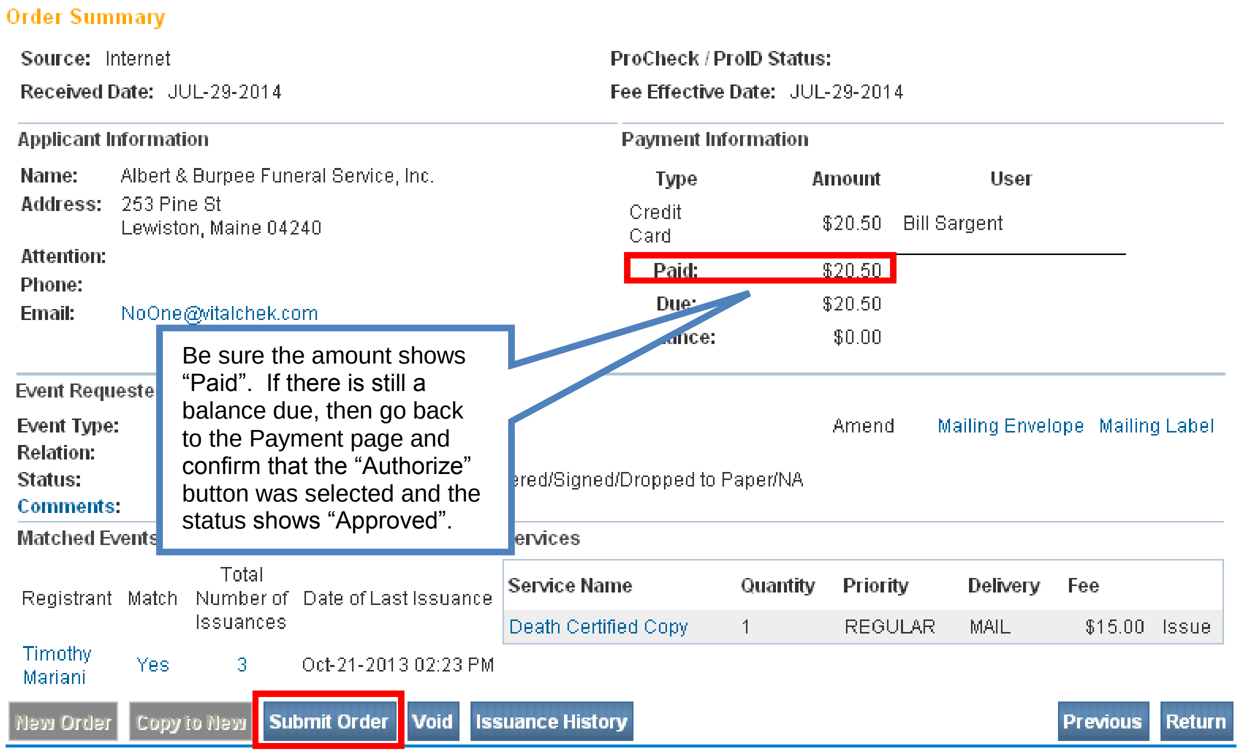


22. Select the **Next** button to proceed to the **Order Summary** page.

Order Summary Page

The **Order Summary** page provides a brief summary of all order data collected and is used to submit the order for processing.

23. Click the **Submit Order** button located at the bottom of the page to submit the order for processing.



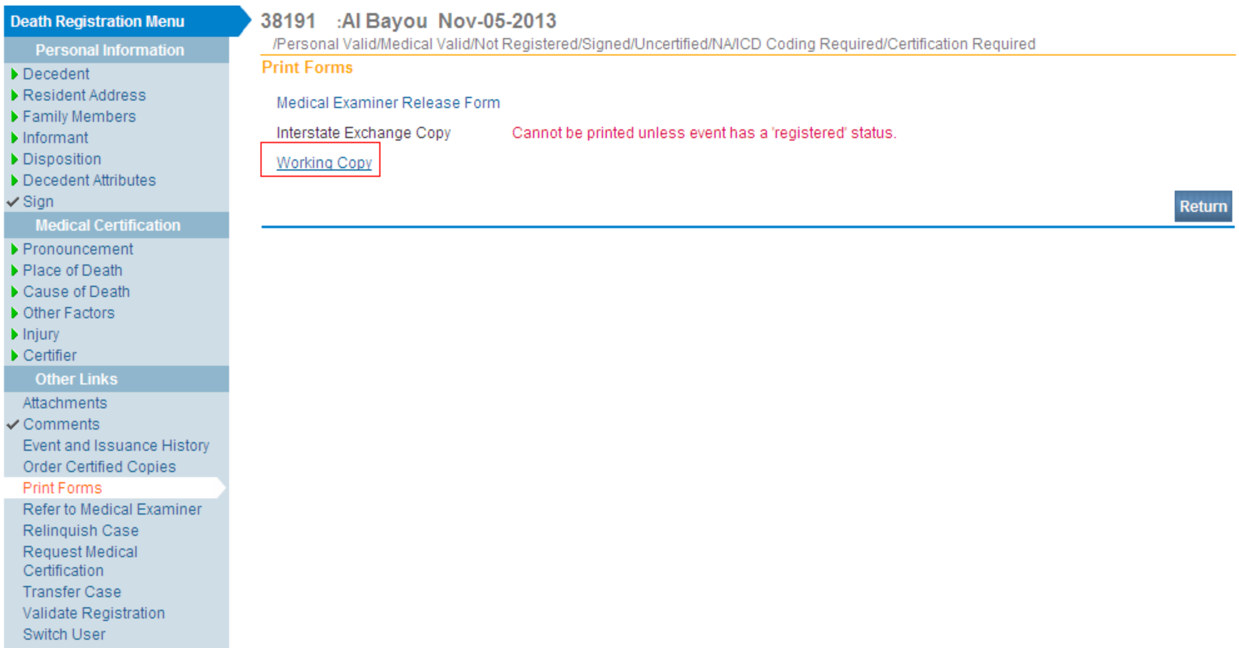
Exercise 5.5 – Print Forms - Working Copy

Skill Learned: How to send working copies of death certificates to an installed printer.

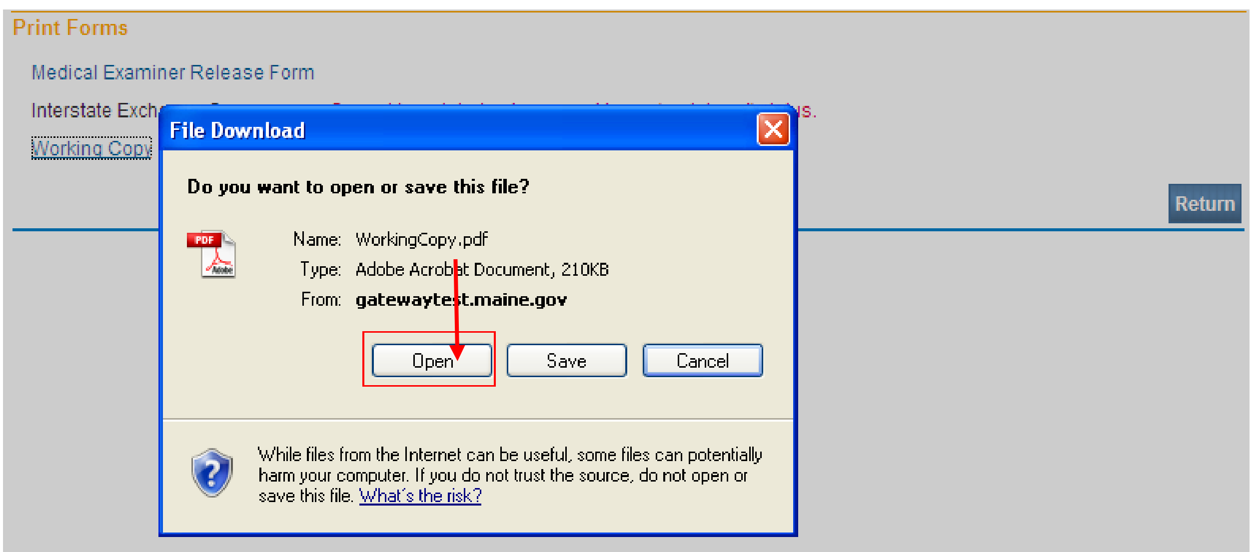
Note: The ability to print a Working Copy of a registration is based on user security privileges.

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

2. Locate the underlined Working Copy link.

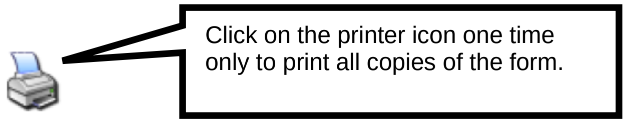


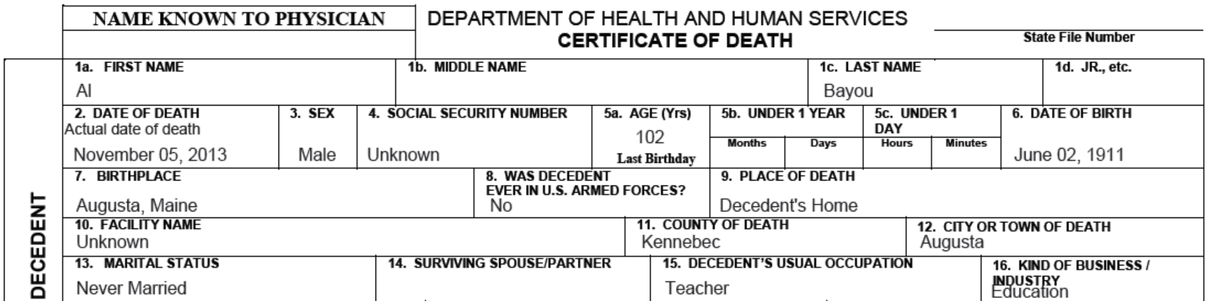
3. Clicking any form link will open the **File Download** dialog box and launch the document for printing.



4. Click the Open button to open the death certificate.

5. Click on the Printer icon only once in the top left-hand corner of the death certificate to print all copies of the form.





NAME KNOWN TO PHYSICIAN

DEPARTMENT OF HEALTH AND HUMAN SERVICES
CERTIFICATE OF DEATH

State File Number

DECEDENT

1a. FIRST NAME Al		1b. MIDDLE NAME		1c. LAST NAME Bayou		1d. JR., etc.	
2. DATE OF DEATH Actual date of death November 05, 2013	3. SEX Male	4. SOCIAL SECURITY NUMBER Unknown	5a. AGE (Yrs) 102 Last Birthday	5b. UNDER 1 YEAR Months / Days	5c. UNDER 1 DAY Hours / Minutes	6. DATE OF BIRTH June 02, 1911	
7. BIRTHPLACE Augusta, Maine		8. WAS DECEDENT EVER IN U.S. ARMED FORCES? No		9. PLACE OF DEATH Decedent's Home			
10. FACILITY NAME Unknown			11. COUNTY OF DEATH Kennebec		12. CITY OR TOWN OF DEATH Augusta		
13. MARITAL STATUS Never Married		14. SURVIVING SPOUSE/PARTNER		15. DECEDENT'S USUAL OCCUPATION Teacher		16. KIND OF BUSINESS / INDUSTRY Education	

Exercise 5.6 – Print Forms - Drop to Paper

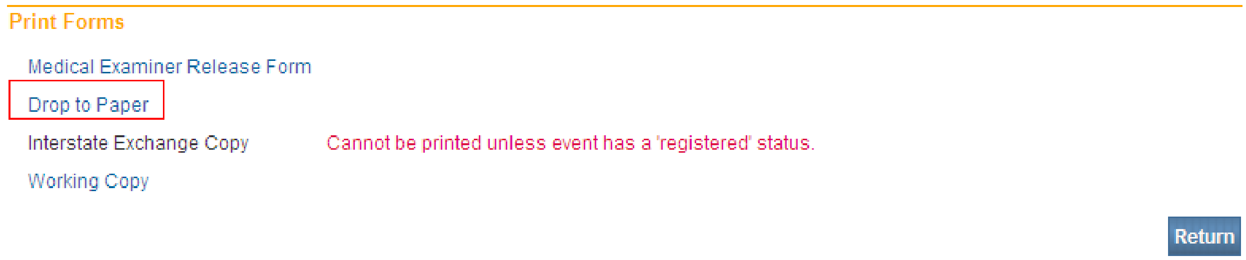
Skill Learned: How to use the Drop to Paper link in order to print a death certificate when either the personal information or the medical certification has been electronically entered and validated but the remaining information will be completed manually.

Note: Access to the Drop To Paper links 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.

For example, if the user is a Funeral Practitioner and the record has a Signed status, or, if the user is a Medical Certifier and the record has a status of Certified, then the Drop to Paper link will be enabled. The Drop to Paper feature should only be used if the death certificate will be completed on paper.

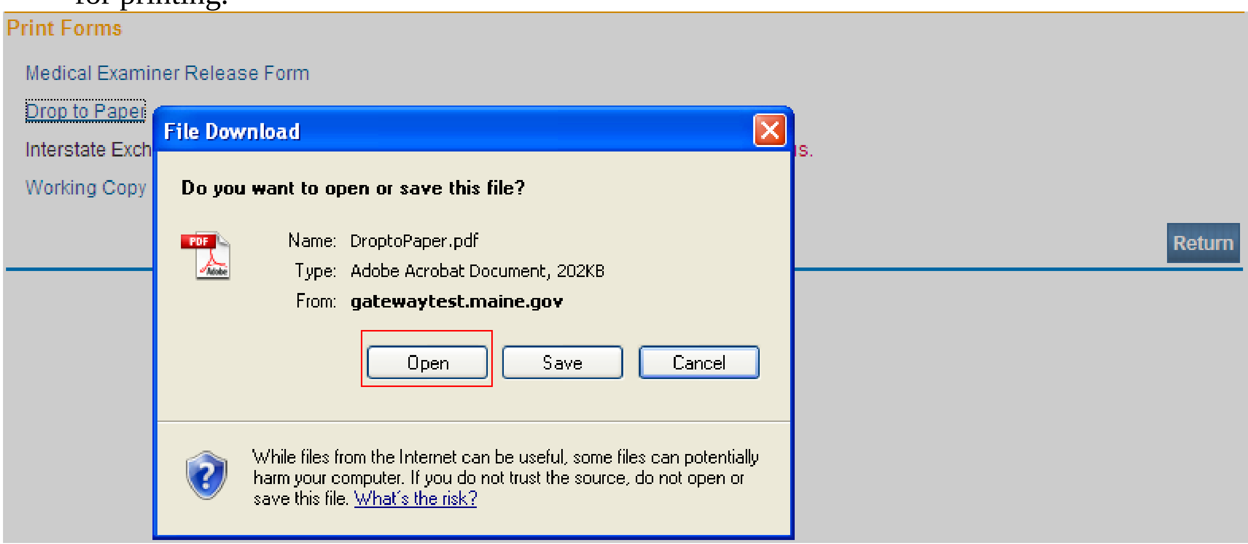
Once a certificate is "dropped to paper", previously authenticated signatures are printed along with all filled-in data. The paper document is then considered the official source of the death certificate information. At this point, **DAVE™** locks all "authenticated" information from further update in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

1. From the **Death Registration Menu**, select **Other Links -> Print Forms -> Drop to Paper**.



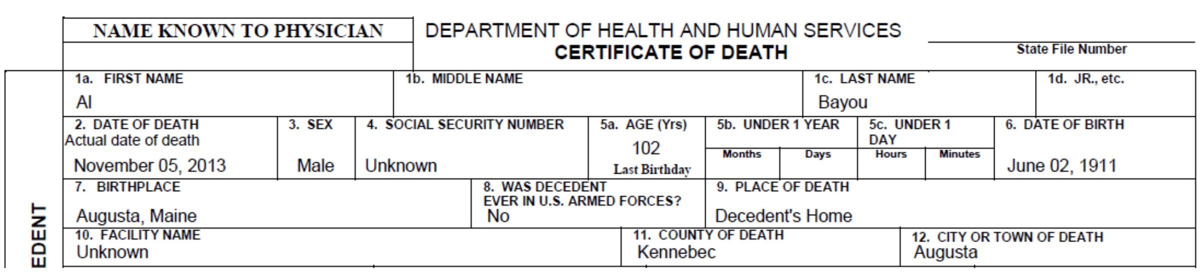
2. In the example above, the Personal Information has been entered, validated and signed. We are going to drop this record to paper in order to complete the **Medical Certification** information. From the **Print Forms** page, locate and click the Drop to Paper link.

3. The File Download box will open. Click the Open button to open the form in pdf format for printing.



4. The form will launch in PDF format for printing.

Click on the Printer icon to send the form to the printer.

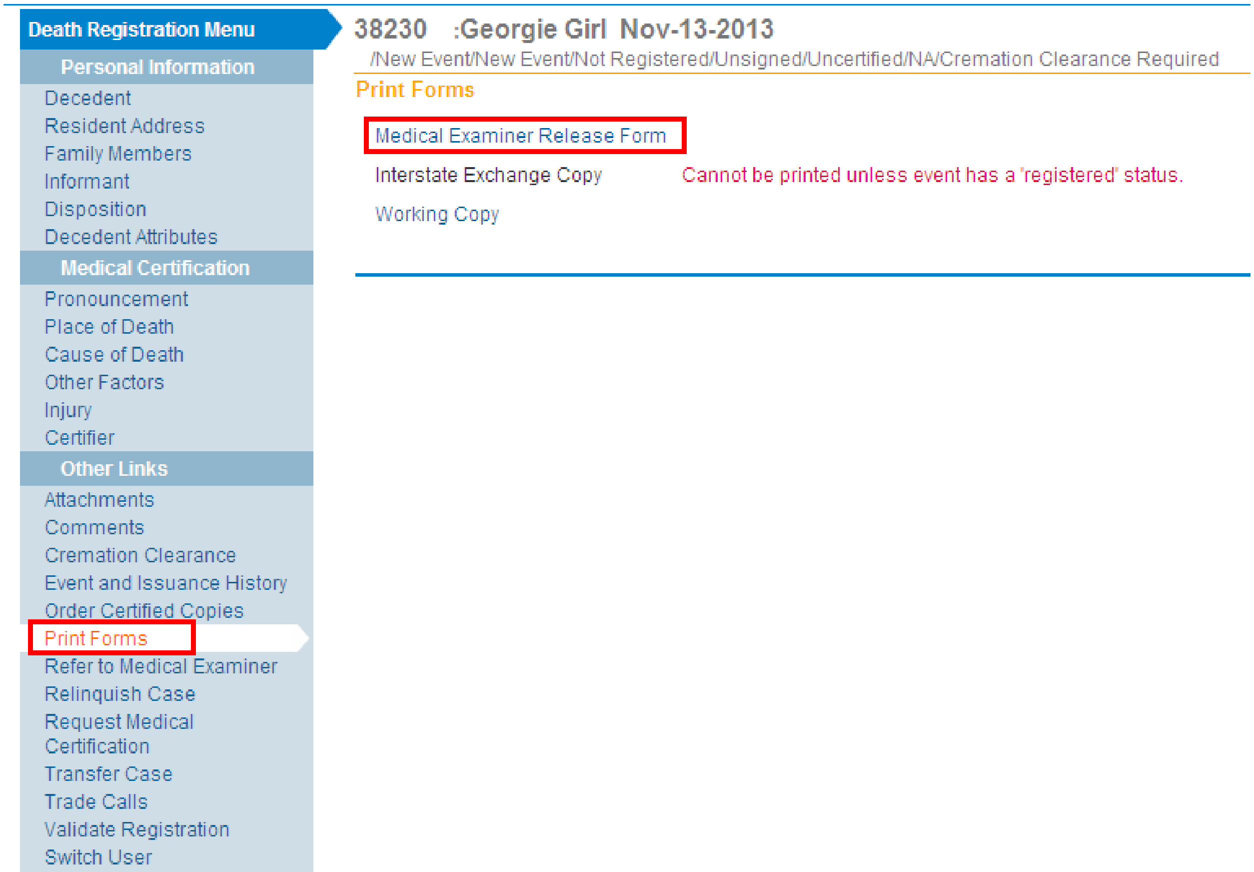

NAME KNOWN TO PHYSICIAN
DEPARTMENT OF HEALTH AND HUMAN SERVICES
CERTIFICATE OF DEATH
State File Number

1a. FIRST NAME Al	1b. MIDDLE NAME			1c. LAST NAME Bayou		1d. JR., etc.	
2. DATE OF DEATH Actual date of death November 05, 2013	3. SEX Male	4. SOCIAL SECURITY NUMBER Unknown	5a. AGE (Yrs) 102 Last Birthday	5b. UNDER 1 YEAR Months Days	5c. UNDER 1 DAY Hours Minutes	6. DATE OF BIRTH June 02, 1911	
7. BIRTHPLACE Augusta, Maine		8. WAS DECEDENT EVER IN U.S. ARMED FORCES? No		9. PLACE OF DEATH Decedent's Home			
10. FACILITY NAME Unknown			11. COUNTY OF DEATH Kennebec		12. CITY OR TOWN OF DEATH Augusta		

EDENT

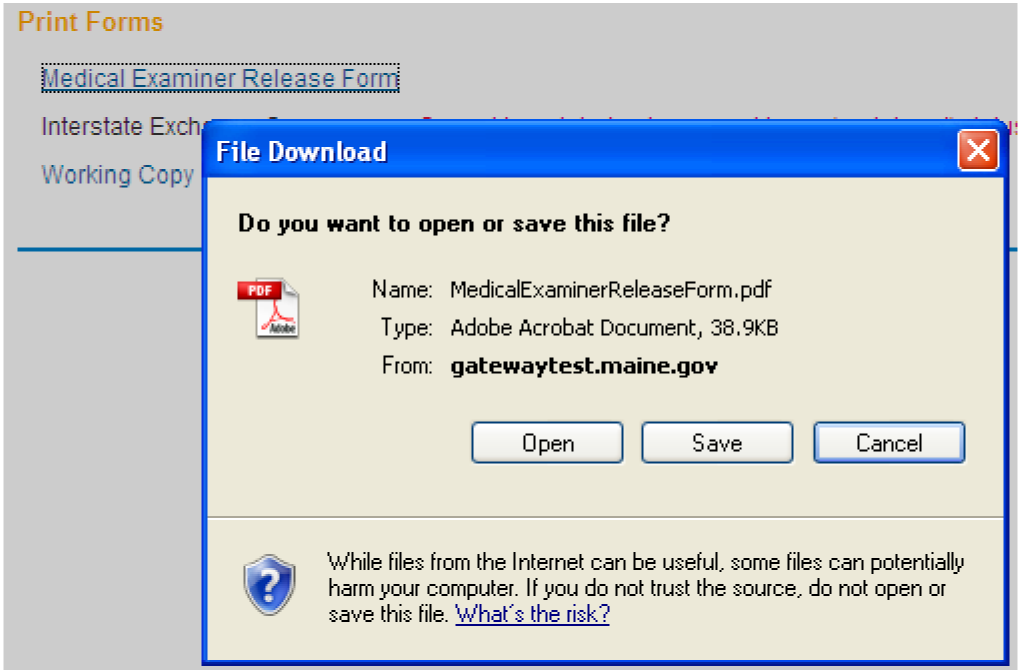
Exercise 5.7 – Print Forms – Medical Examiner Release Form

Skill Learned: How to use the Medical Examiner Release Form link in order to print the Medical Examiner's Release of Human Remains form.



1. From the **Death Registration Menu**, select **Other Links -> Print Forms -> Medical Examiner Release Form**.

2. The File Download box will open. Click the Open button to open the form in pdf format for printing.



3. The form will launch in PDF format for printing.

DISTRIBUTION OF COPIES: ☐ **Facility of Final Disposition** ☐ **Place Permit Issued**

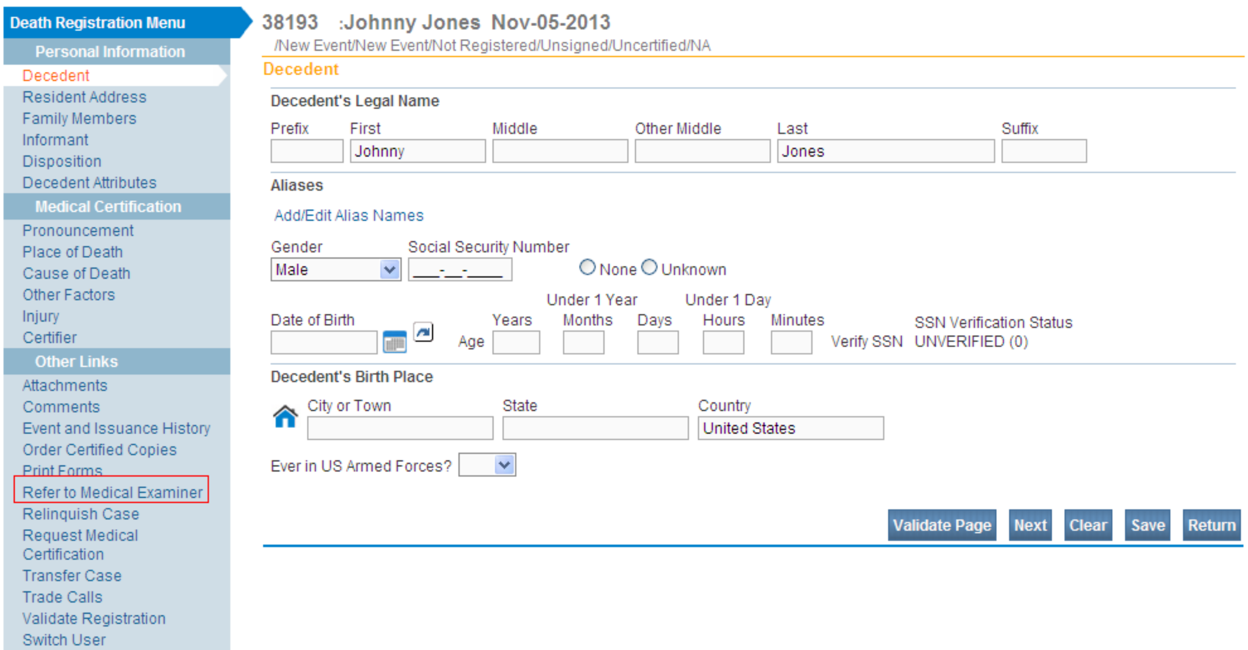
STATE OF MAINE
Department of Health and Human Services
MEDICAL EXAMINER'S RELEASE OF HUMAN REMAINS

1. FULL NAME OF DECEASED (First, Middle, Last, Jr., etc.) Georgie Girl		2. DATE OF DEATH (Mo., Dy., Yr) November 13, 2013	
3. PLACE OF DEATH (City or Town) Maine			
4. TYPE OF DISPOSITION	☒ Cremation ☐ Use by Medical Science	☐ Removal from State ☐ Burial at Sea	

Exercise 5.8 – Refer To Medical Examiner

Skill Learned: How to refer a case to the medical examiner for official review. The purpose of the **Refer to Medical Examiner** page is to notify a medical examiner of a death that was due or may have been due to unnatural causes.

1. From the **Death Registration Menu** select **Other Links -> Refer to Medical Examiner** link.



2. This will launch the **Refer to Medical Examiner** page as shown below. Notice, that the **Message** field is auto-filled with a pre-formatted message. This message can be sent as is, edited, or deleted and replaced entirely.

3. Click **Save** to complete the referral process. The next time the medical examiner logs in, this case will appear in their work queue and/or messages.

Exercise 5.9 – Relinquish Case

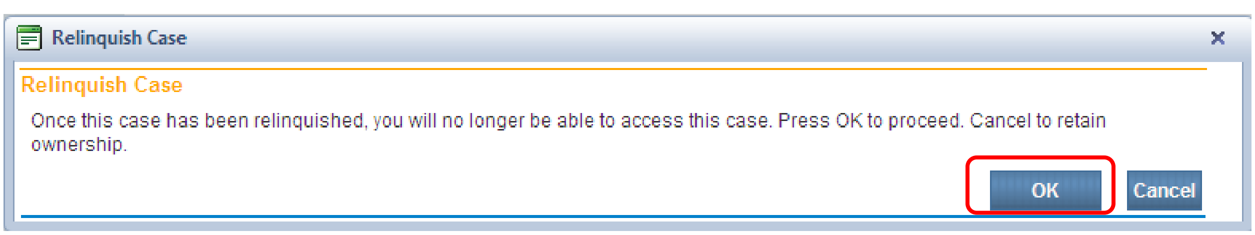
Skill Learned: How to surrender ownership of a record. Once a funeral practitioner has taken "ownership/signed" the personal portion of a record, no other user has "write access" to that portion of the record. The Relinquish Case link allows a user to relinquish control of their portion of a record so that a different user can login and take ownership.

For example, if the case is "signed" it will become "un-signed" once the owner relinquishes the case giving another user access to the case.

NOTE: The person relinquishing the case will no longer have access to the case **once the other user has accepted ownership**. If the other user has not yet accepted ownership, the person who relinquished the case can regain access to the case by going to Life Events>Death>Start/Edit New Case.

1. From the **Death Registration Menu** select **Other Links -> Relinquish Case**.

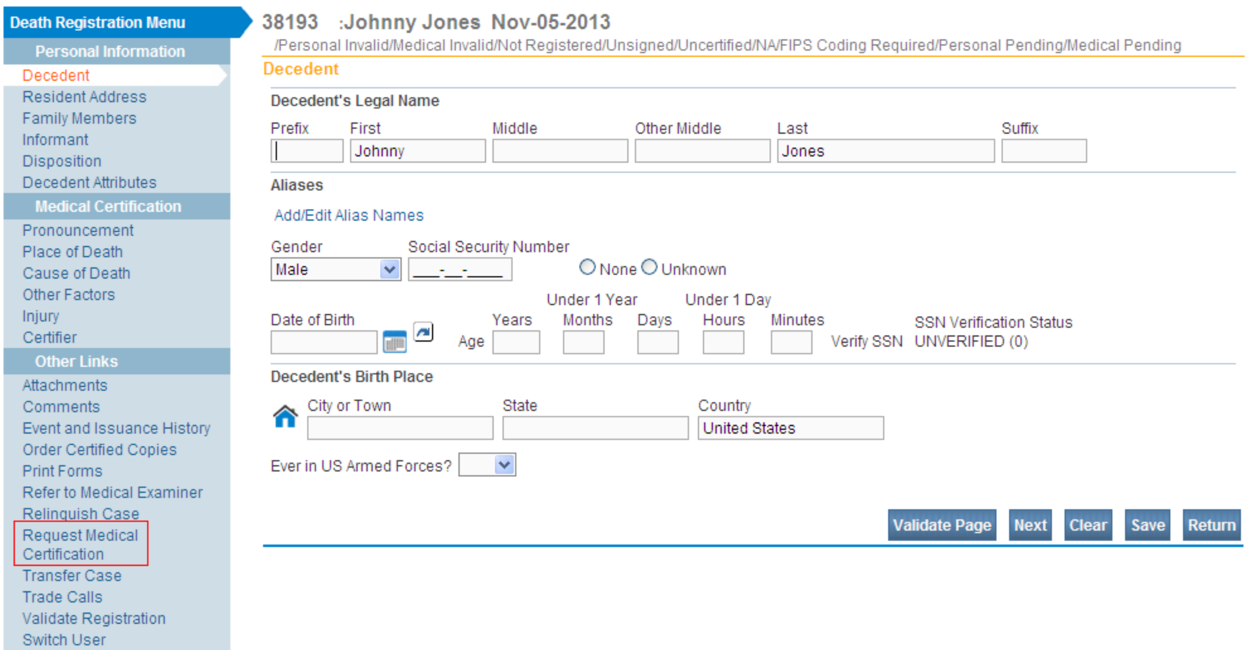
2. The **Relinquish Case** window will pop onscreen. Select **OK** to relinquish control of the record or **Cancel** to retain ownership of the record.



Exercise 5.10 – Request Medical Certification

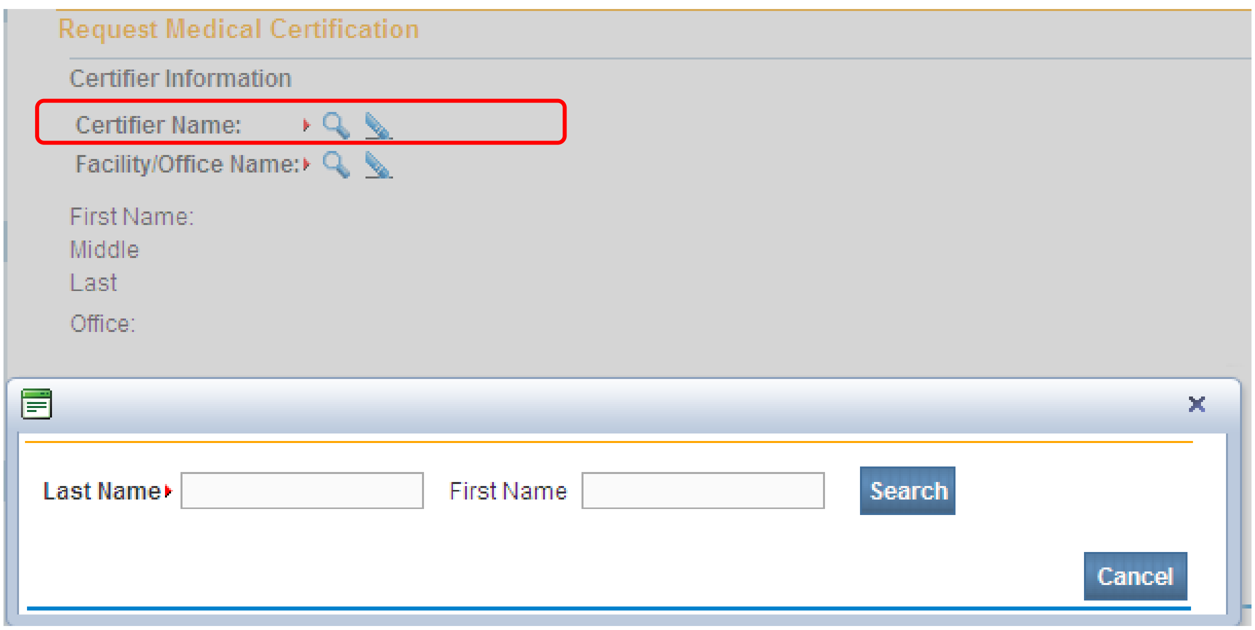
Skill Learned: How to use the Request Medical Certification page. The **Request Medical Certification** page is used when the Funeral Practitioner has finished inputting their data and is ready to hand the case off to a physician for certification. A medical facility user may also use the **Request Medical Certification** feature to notify a physician that a case is ready for review.

1. From within any death record, select from the **Death Registration Menu->Other Links->** the **Request Medical Certification** link.

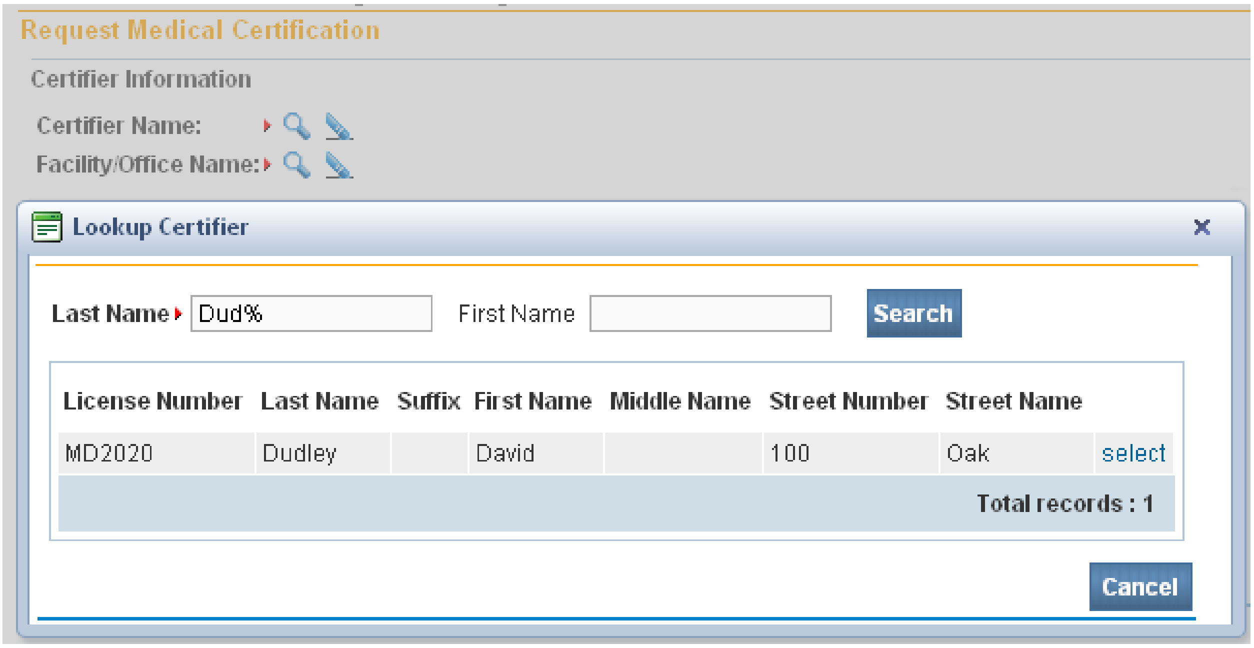


2. This will launch the **Request Medical Certification** page as shown below. Notice, that the **Message** field is auto-filled with a pre-formatted message. This message can be sent as is, edited, or deleted and replaced entirely.

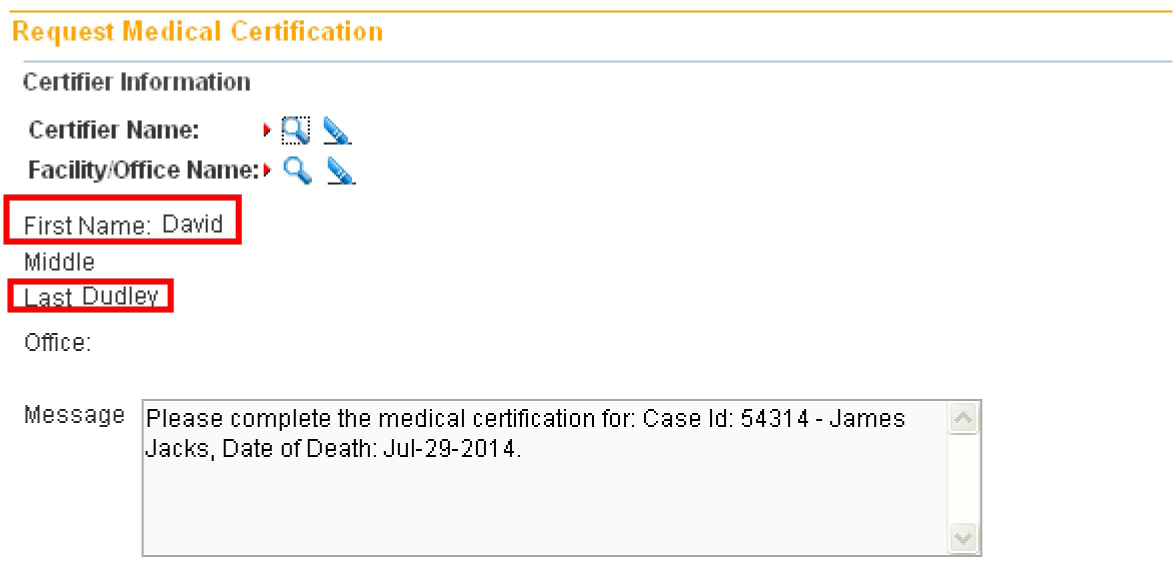
3. Next, locate the appropriate medical certifier by clicking the **LookUp** control ( ).



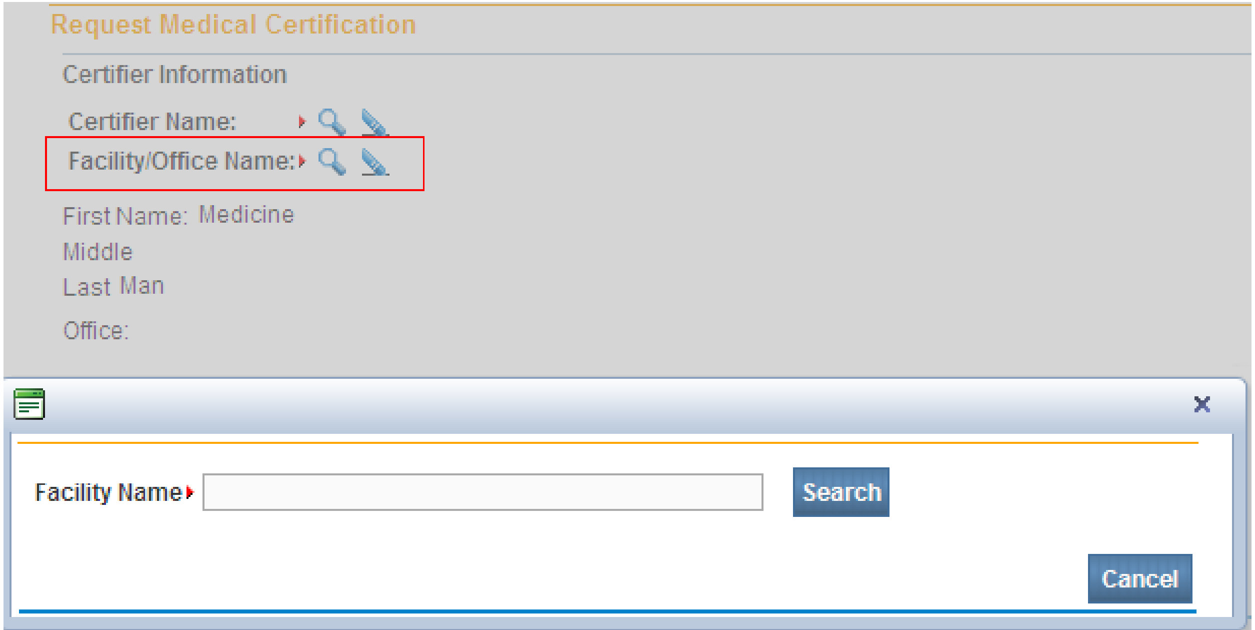
4. Search for a certifier from the **Search Certifiers** dialog, shown above, by entering all or a portion of the last name and the wildcard character "%". Click the Search button to perform the search.



5. From the resulting list, choose the Medical Certifier by clicking the corresponding select link. This will close the **Search Certifiers** dialog and insert the certifier name into the **Name** field.

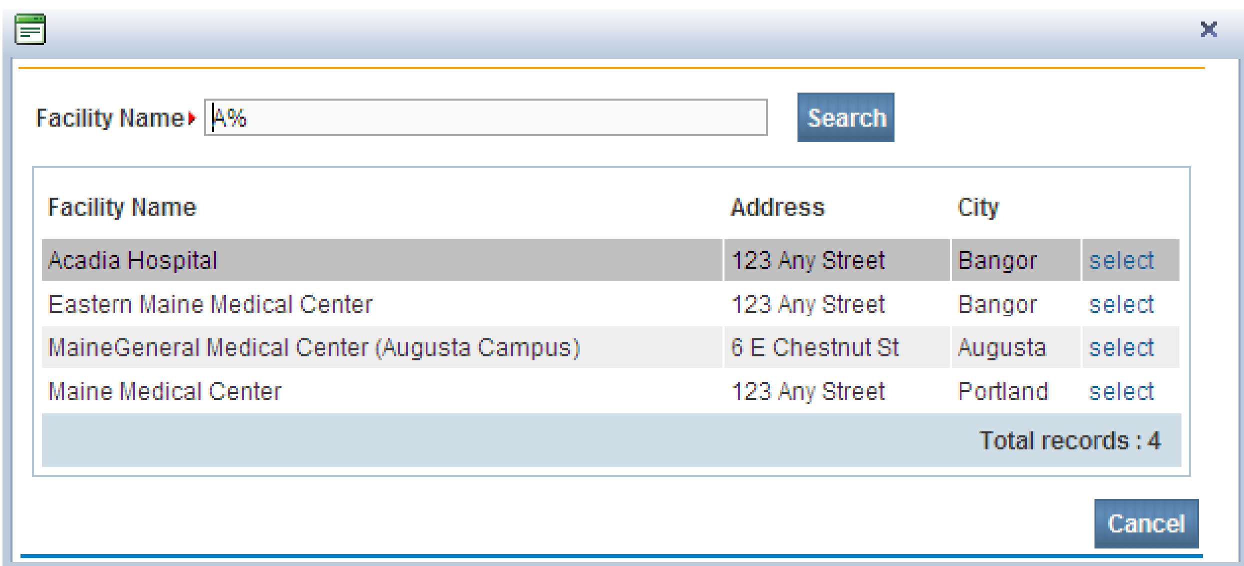


6. Next, select the Facility/Office Name in the same manner. Click on the lookup icon next to the Facility/Office Name as shown above.



7. Enter a few characters of the facility name along with the wild card, (%), character or just the wild card character alone to show all facilities the selected certifier is associated with.

8. Use the Select link to choose a facility and load the information.



9. Select **Clear** to clear all entries and begin again, **Save** to save changes and request certification or **Return** to leave this page without saving changes and return to the previous page. If you select **Save**, the next time the selected certifier logs into **DAVE™,** the current record will appear in their **Current Activities** work queues.

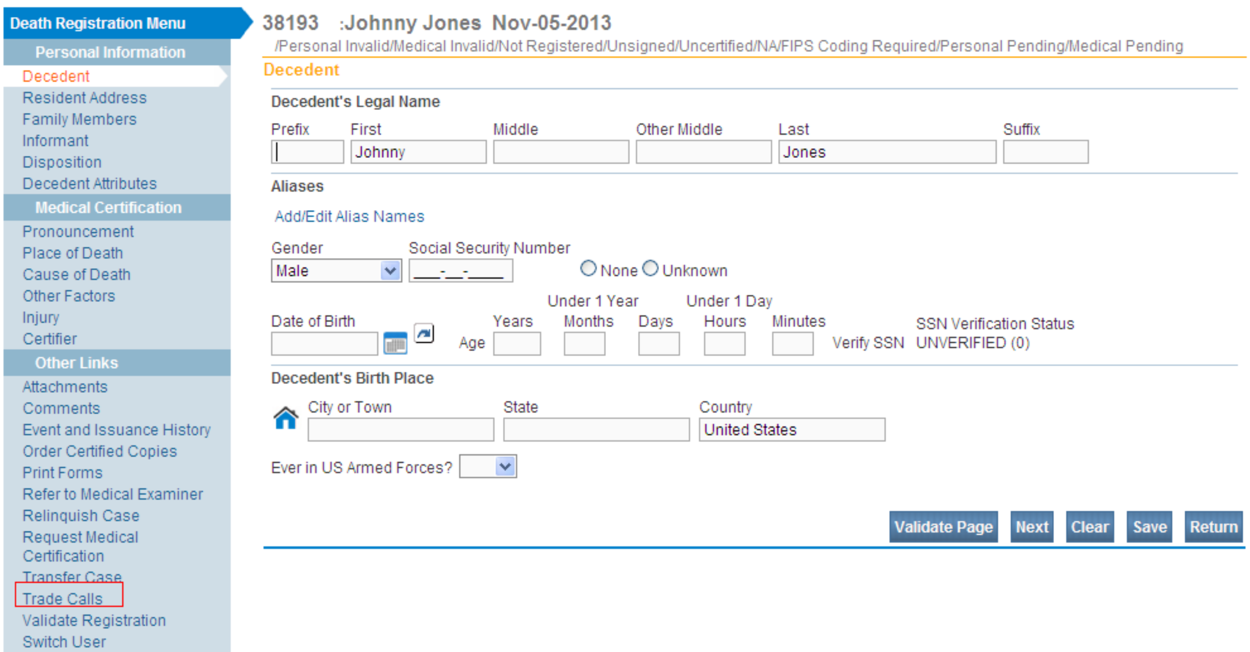
Exercise 5.11 – Trade Calls

Skill Learned: How to use the **DAVE™** application to process **Trade Calls**. Trade Calls occur when one funeral home acts as a broker for another funeral home; frequently one that is out of state. In these cases, a funeral home user will enter all death information including the name of the funeral home for which they are performing the service.

Key Points:

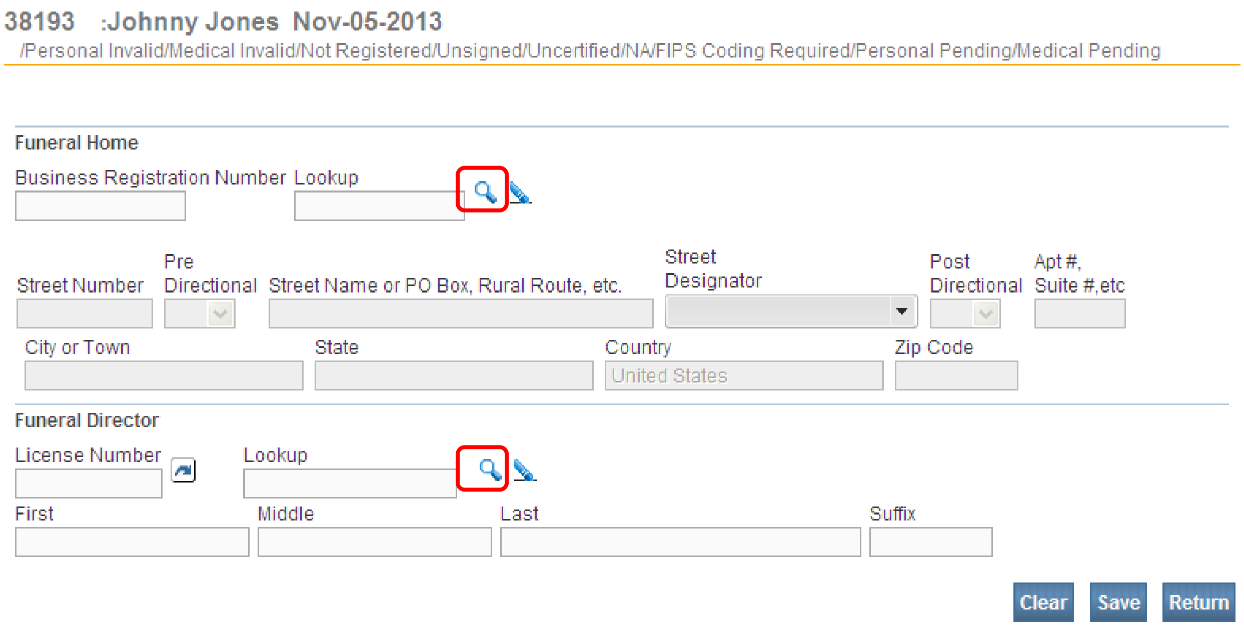
- The Funeral Home that is responsible for filing the certificate should be entered on the **Disposition** page.
- The trade call Funeral Home should be entered on the **Trade Calls** page.
- The funeral home on the **Trade Calls** page cannot change the funeral home listed on the **Disposition** page.

1. Select the **Death Registration Menu**->**Other Links->Trade Calls** link**.**

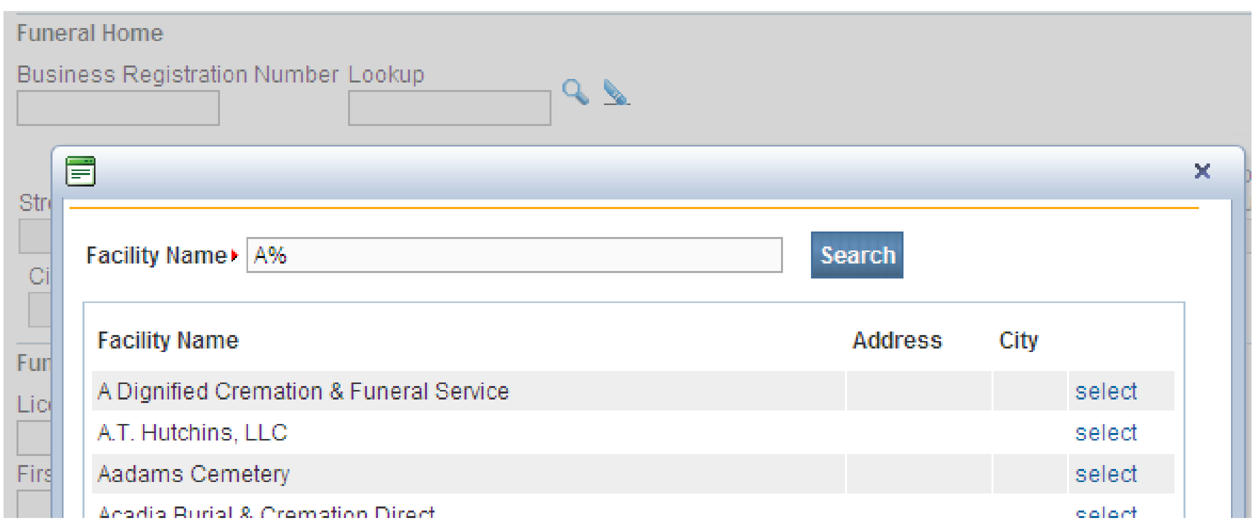


> **Note: The ability to select the Trade Calls link is based on user security privileges and is generally restricted to Funeral Practitioners only.**

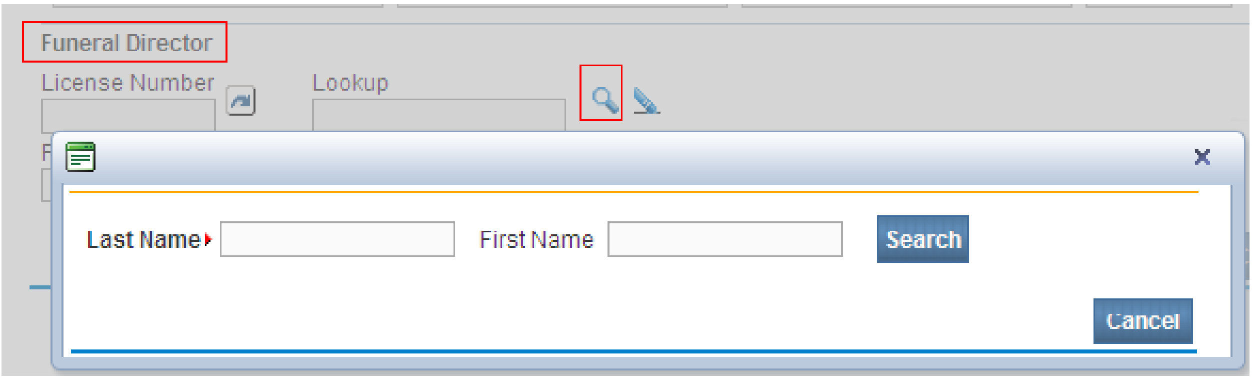
2. There are two tabs on this page: **Funeral Home** and **Funeral Director**. Each tab contains a **Lookup** ( ) control. Click the **Lookup** ( ) control on the **Funeral Home** tab.



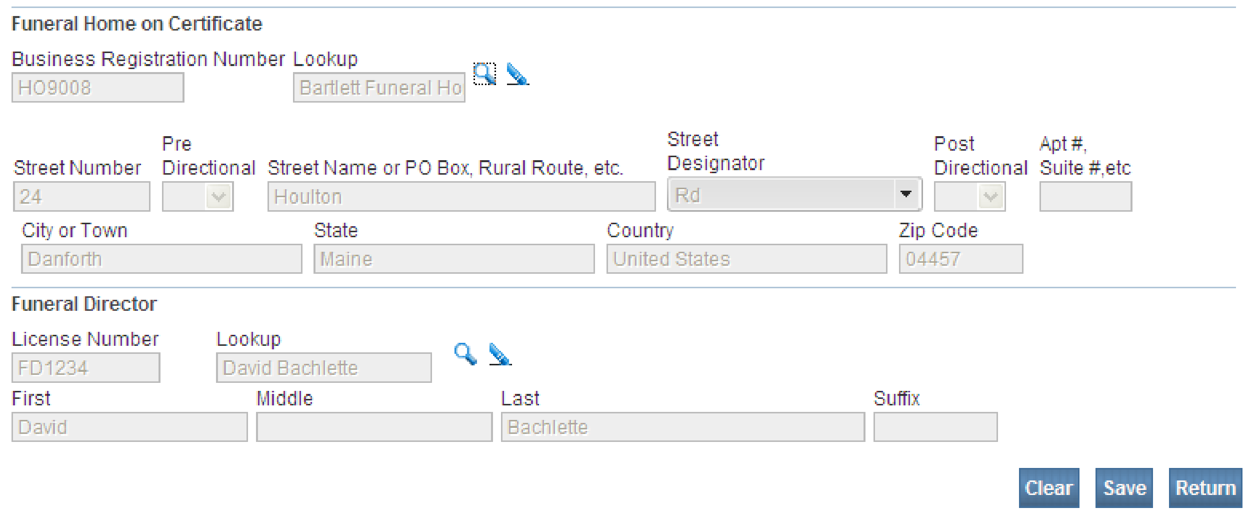
3. From the **Facility Name** window select the funeral home associated with the Trade Company involved in this Trade Call.



4. Click the **Lookup** ( ) control on the **Funeral Director** tab to launch the **Search Funeral Directors** window. Select the trade company from this list of funeral homes.



5. As shown, the Trade Company Funeral Home address information is auto-populated in the fields.



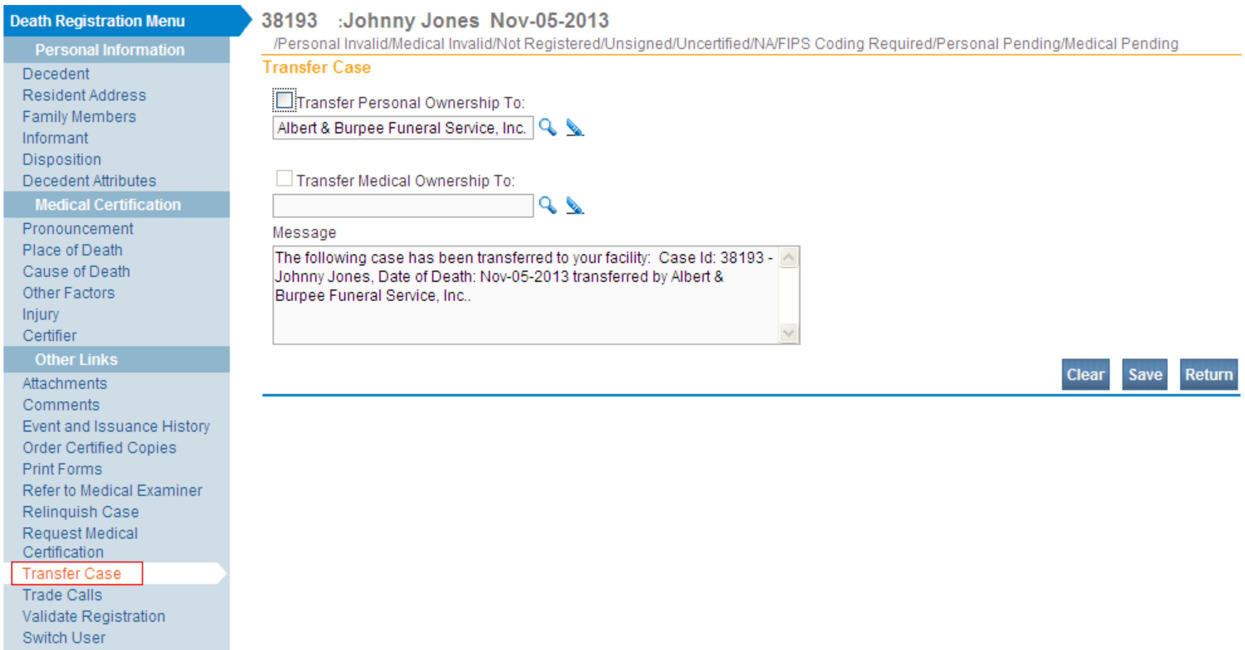
6. Select **Clear** to clear entries and start over, **Save** to save, or **Return** to close this page without saving changes.

Exercise 5.12 – Transfer Case

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

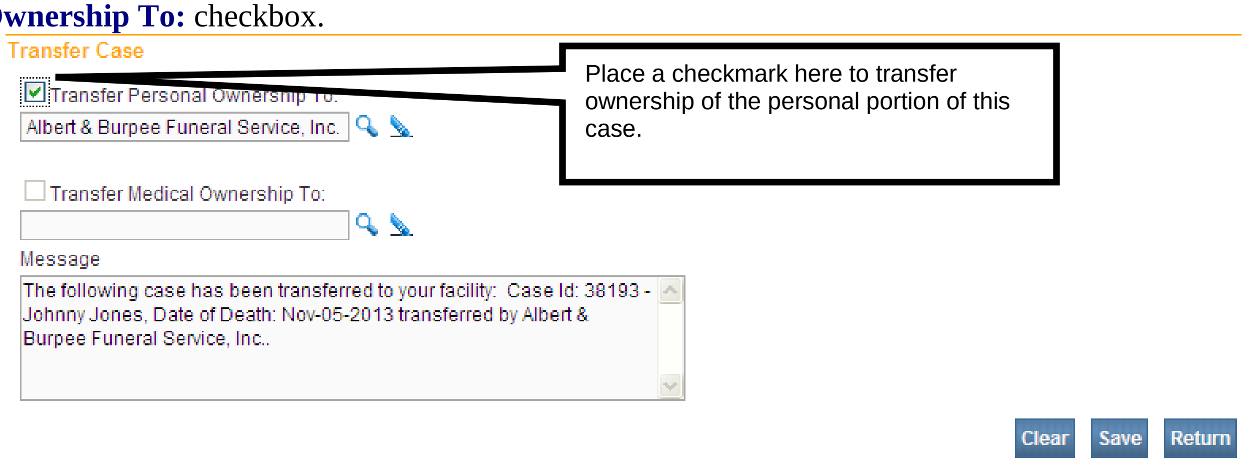
In this case, the transferring funeral home would use the **Transfer Case** page to relinquish ownership to the firm responsible for interment.

1. Select **Death Registration Menu->Other Links->Transfer Case** link.

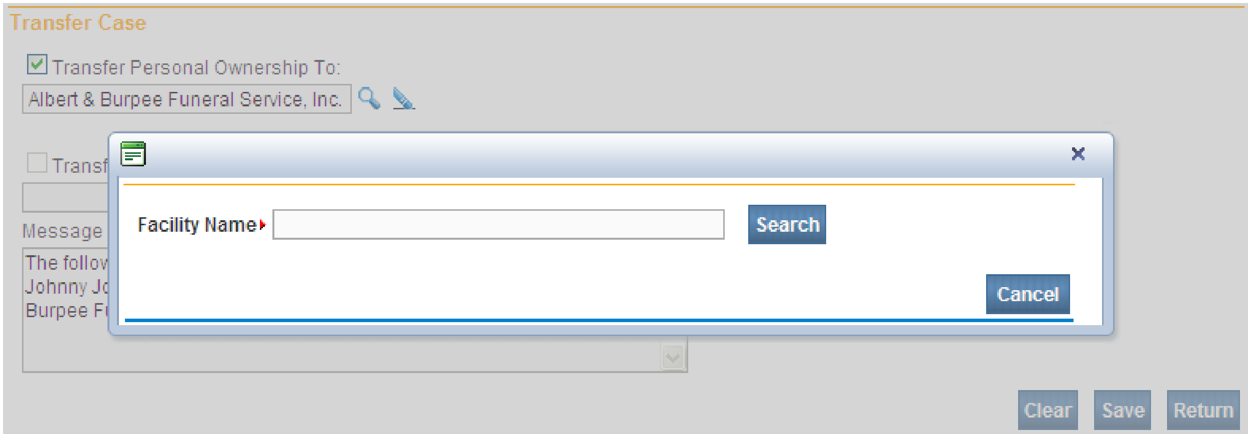


Note: There are two types of ownership: Personal, which is controlled at the Funeral Home, and Medical, which is controlled by the governing medical facility. The availability of each is dynamically controlled based on user security profile.

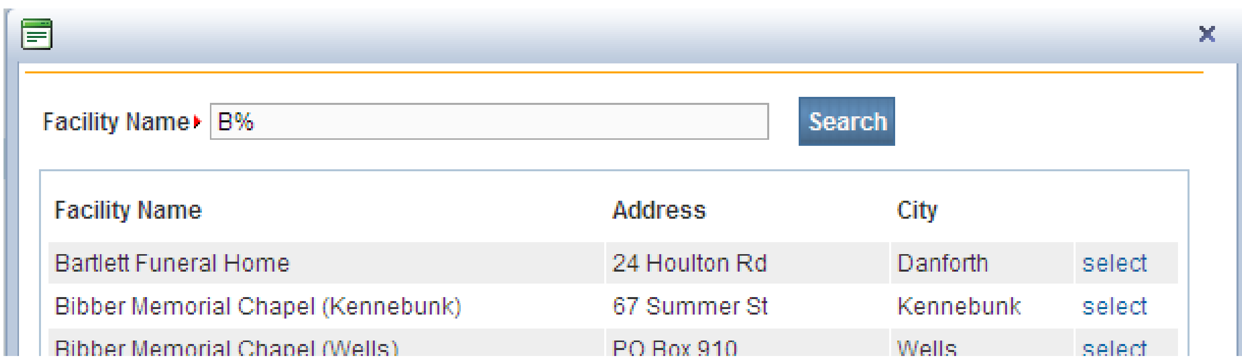
2. To **Transfer Personal Ownership**, place a checkmark in the **Transfer Personal Ownership To:** checkbox.



3. Next, use the **Lookup** control ( ) to select the receiving facility.

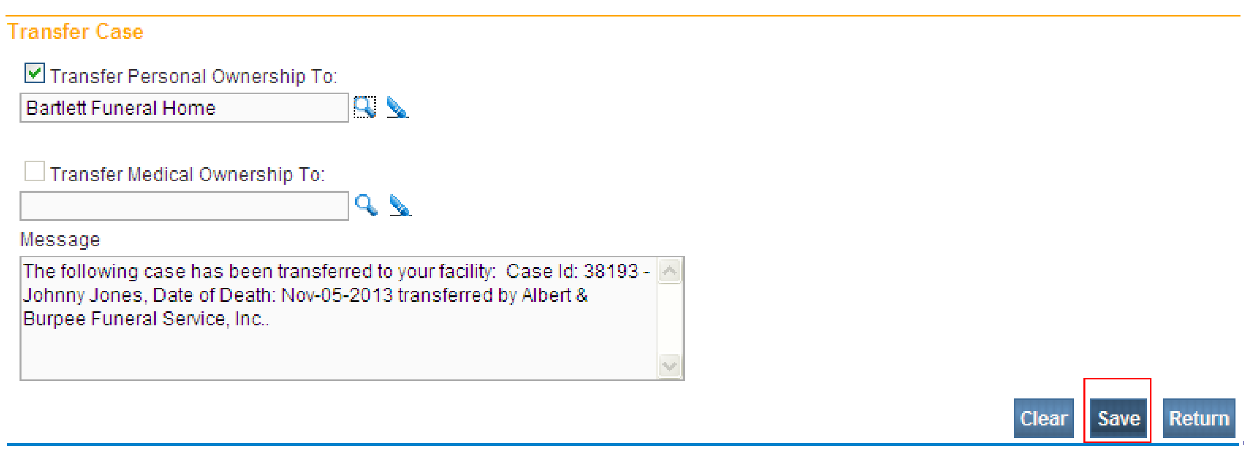


4. Enter a portion of the Funeral Home name followed by the wild card character, “%”, then click the Search button.



5. Click the Select link next to the Funeral Home to which the case shall be transferred to. The selection window will close.

6. Finally, select **Save** to save changes and transfer ownership of the record, **Clear** to clear all entries and begin again, or **Return** to leave this page without saving changes and return to the previous page.



Section 6: Work Queues

In this section, you will learn how to navigate through the various **DAVE™** work queues. From the **Home** page, select **Queues**. Queues are used to group death cases together based on the amount of work that has been done with them and the amount of work that still needs to be done. This grouping is accomplished through the assignment of work queue statuses based on validation rule failures.

Exercise 6.1 – Work Queue Summary

Skill Learned: How to access records via work queues. As registrations work their way through **DAVE™**, they will pass from one work queue to another. **Queues** represent the statuses assigned to records in **DAVE™**.

1. From the **Home** page, 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.

2. The default sort order is by **Queue Name**. Notice however, that the column headers in the summary table are all blue links. Clicking any of these links will change the sort order of the table based on that column's content.

Click on any of the column headers to resort the work queue summary table.

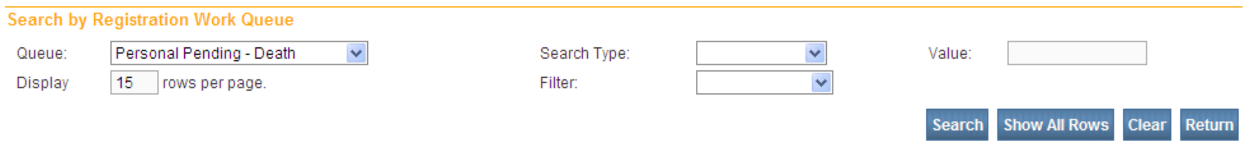
Registration Work Queue Summary

Queue Name	Type ↓	Count	Age of Oldest in Days
Cause of Death Pending	Death	3	407
ME Review Required	Death	2	309
Medical Pending	Death	16	57
Personal Pending	Death	14	57
Requested	Death	3	34
Signature Required	Death	1	1
			Total Queues : 6

3. **Type** indicates the kind of record being presented.

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

5. On the **Search by Registration Work Queue** page, select **Personal Pending – Death** from the **Queue** dropdown list, then select **Search**.



In the example shown here there are 14 cases in the **Personal Pending** queue.

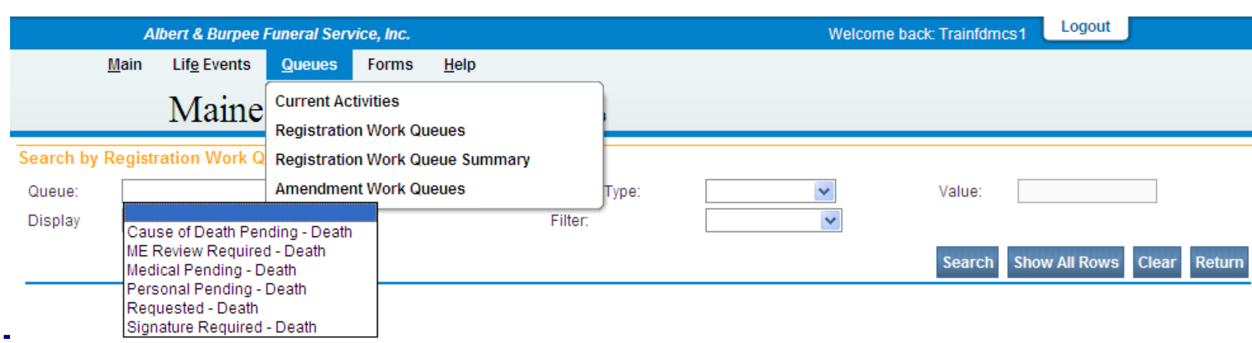
All	Case Id	File Number	Registrant	Date of Event ↑	Data Provider
☐	38193		Jones, Johnny	Nov-05-2013	Albert & Burpee Funeral Service, Inc.
☐	38189		Smith, Jack	Nov-05-2013	Albert & Burpee Funeral Service, Inc.
☐	38184		Caper, Johnny	Oct-30-2013	Albert & Burpee Funeral Service, Inc.
☐	38157		Caper, Johnny	Oct-30-2013	Albert & Burpee Funeral Service, Inc.
☐	38064		Jupiter, Joe	Oct-15-2013	Albert & Burpee Funeral Service, Inc.
☐	38057		Birds, Sonya	Oct-11-2013	Albert & Burpee Funeral Service, Inc.
☐	38052		Keene, George	Oct-10-2013	Albert & Burpee Funeral Service, Inc.
☐	38004		Sung, Sam	Oct-03-2013	Albert & Burpee Funeral Service, Inc.
☐	37997		Scotch, Butter	Oct-03-2013	Albert & Burpee Funeral Service, Inc.
☐	37996		Road, Rocky	Oct-03-2013	Albert & Burpee Funeral Service, Inc.
☐	37994		Blaine, Paul	Oct-02-2013	Albert & Burpee Funeral Service, Inc.
☐	37993		Redkins, Reds	Oct-02-2013	Albert & Burpee Funeral Service, Inc.
☐	37973		Carter, James P	Sep-25-2013	Albert & Burpee Funeral Service, Inc.
☐	37843		Diner, Ed	Sep-09-2013	Albert & Burpee Funeral Service, Inc.
					Total records : 14

6. Click any Registrant name or Case Id link to open that record for review or editing.

Exercise 6.2 – Work Queues - Search

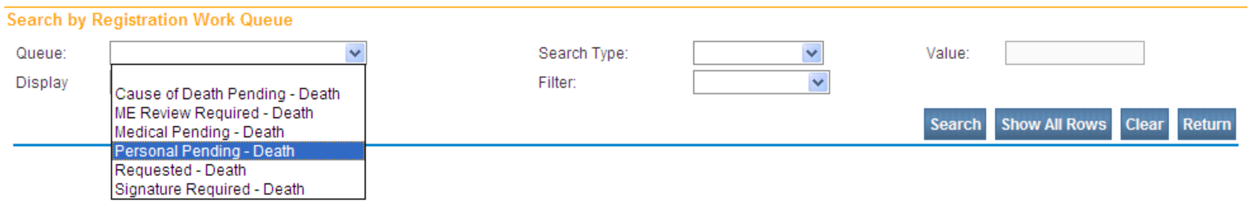
Skill Learned: How to search for cases based on their queue status.

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

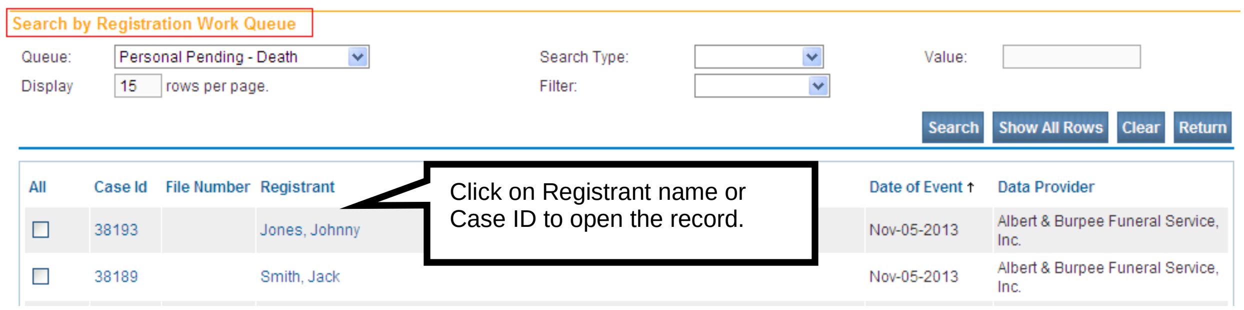


Note: The actual work queues available will vary based on user type and user security setup.

2. Select one of the available queues from the **Queue** dropdown and click the **Search** button. This will return a list of all cases in the selected queue.



3. Click the **Return** button to return to the **Search by Registration Work Queue** window.



4. Click the Registrant name or Case Id link to open the record for review or editing.

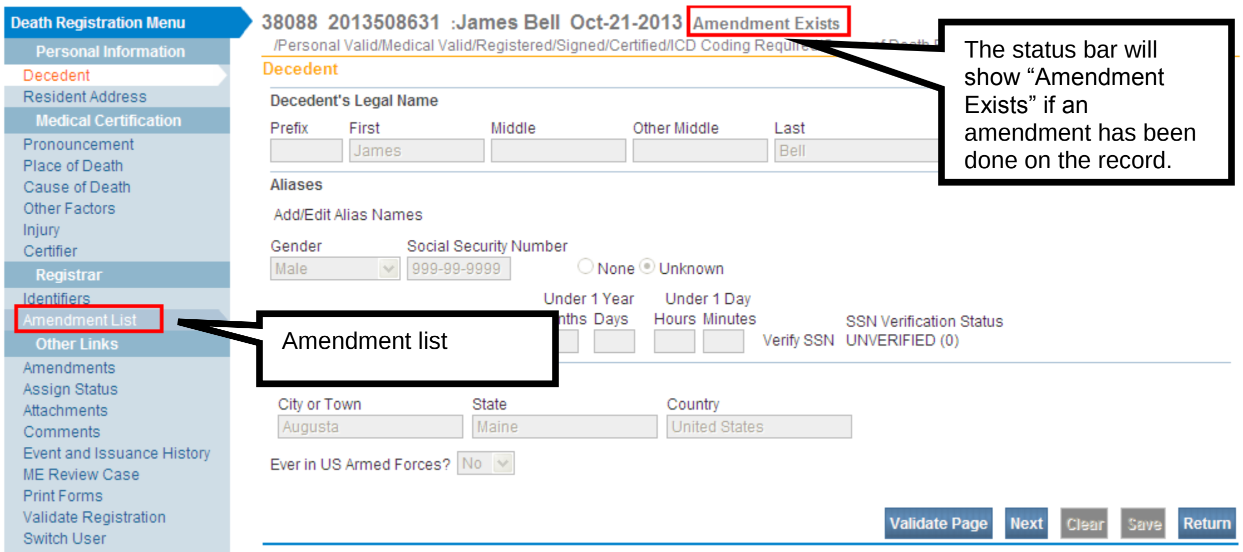
Section 7: Amendments

Exercise 7.1 – Amendment List

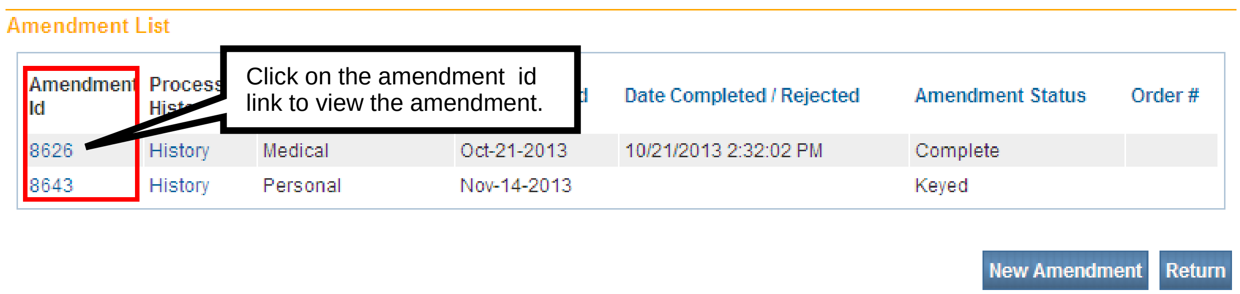
Skill Learned: How to use the **Amendment List** to retrieve existing Amendments.

Note: Access to the Amendment List link is based on user security privileges.

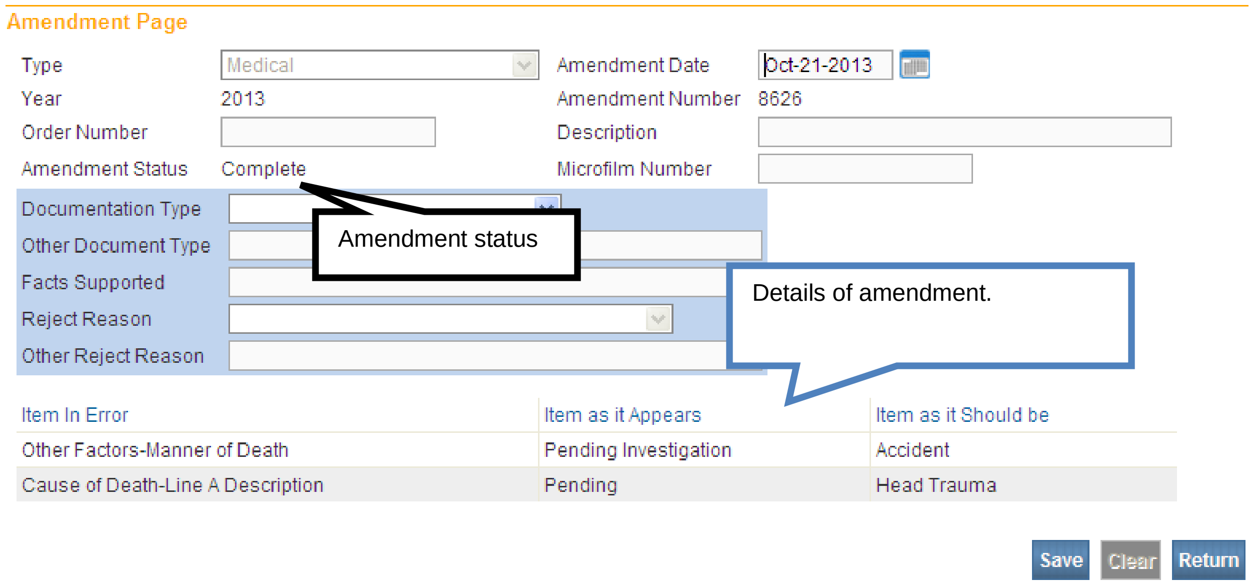
1. From within an amended record, under the **Registrar** sub-menu select **Amendment List**.



2. The **Amendment List** page will display a listing of all amendments associated with the current record. Notice that the **Amendment Id** column contains links to specific amendments. Click on an **Amendment Id** link to view the amendment.



3. The **Amendment Page** will display with the details of the amendment including the **Amendment Status**.



4. Click the **Return** button to return to the **Amendment List** page.

Exercise 7.2 – Amendments

Skilled learned: How to request amendments to registered death records.

Note: An amendment can only be created on a case that has been registered. Please check the status bar to make sure the case is "Registered". If the case is not registered the amendment link will not be available.

The following **requirements** must be met before an amendment will be approved.

1. A VS-7 which has been witnessed, notarized and signed must be attached to the amended record. The original VS-7 does not need to be mailed to the Vital Records office as long as a copy is attached to the record. The signature of the funeral practitioner or informant must be the same person shown on the record.

2. Changes to "Last Name" must be accompanied by two (2) pieces of documentation supporting this change, and attached to the amended record.

3. Funeral practitioners cannot process corrections that are over ninety (90) days from the file date*. Please submit to Vital Records the VS-7, two (2) pieces of documentation supporting this change, and a check for $60 made payable to the Treasurer, State of Maine. Late fees will not be waived.

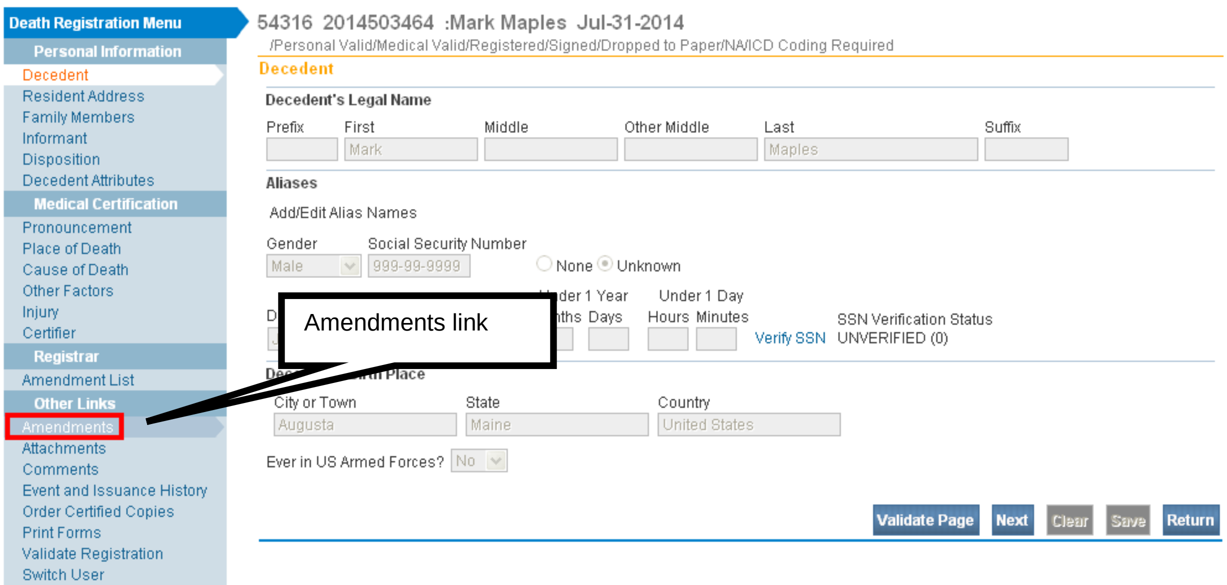
***Note: The file date can be found on the Working Copy.**

4. Any changes on the record that have previously been amended will require that the informant submits a court order to Vital Records.

Create an Amendment Request:

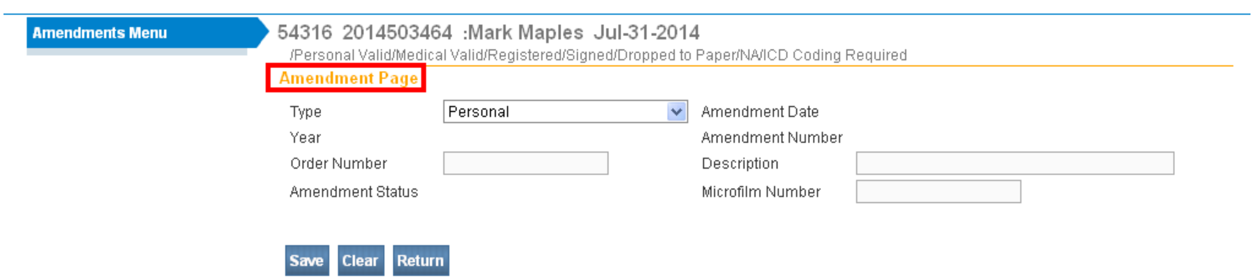
1. Open the “registered” case that needs to be amended.

2. In the **Death Registration Menu** **select from the** **Other Links** **sub-menu the** **Amendments** link. The **Amendments Page** will open.

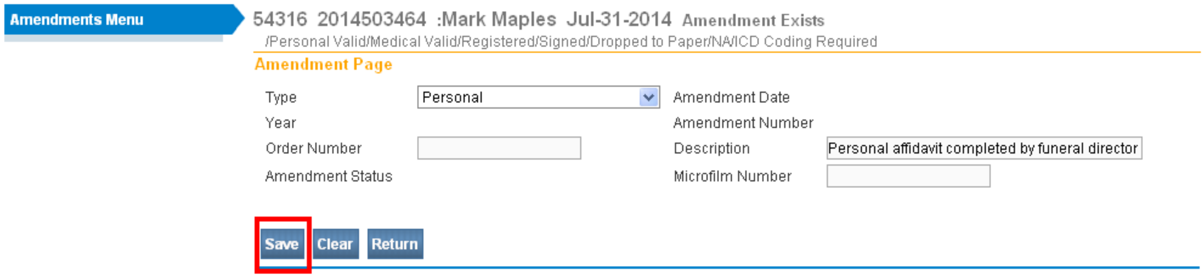


Notice when the **Amendments** link is selected the **Death Registration Menu** is removed from the page, and the **Amendment Page** is displayed.

3. The amendment Type dropdown will default to Personal as shown below.

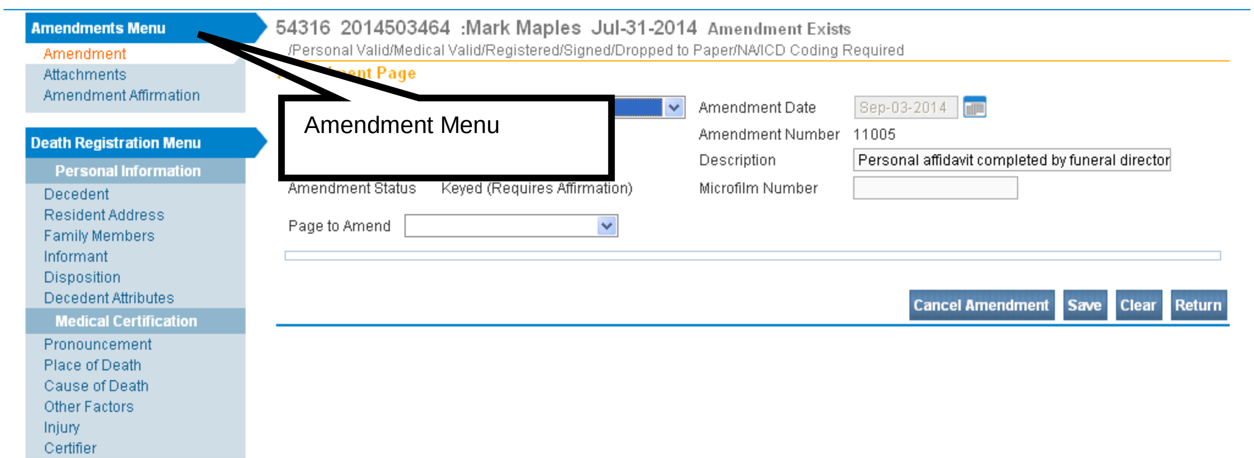


4. Add a description of the amendment in the Description field. The description should say "Personal affidavit completed by funeral director".

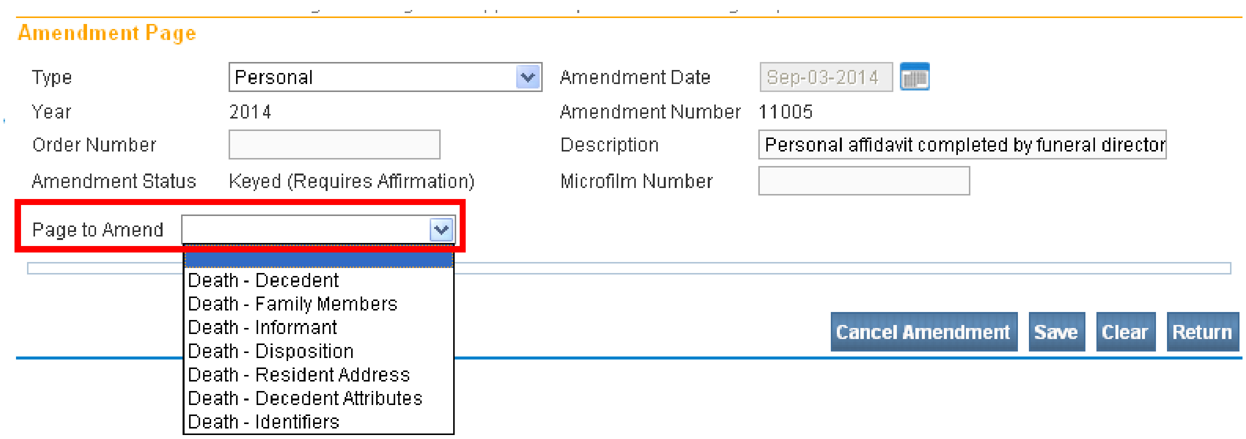


5. Click the SAVE button.

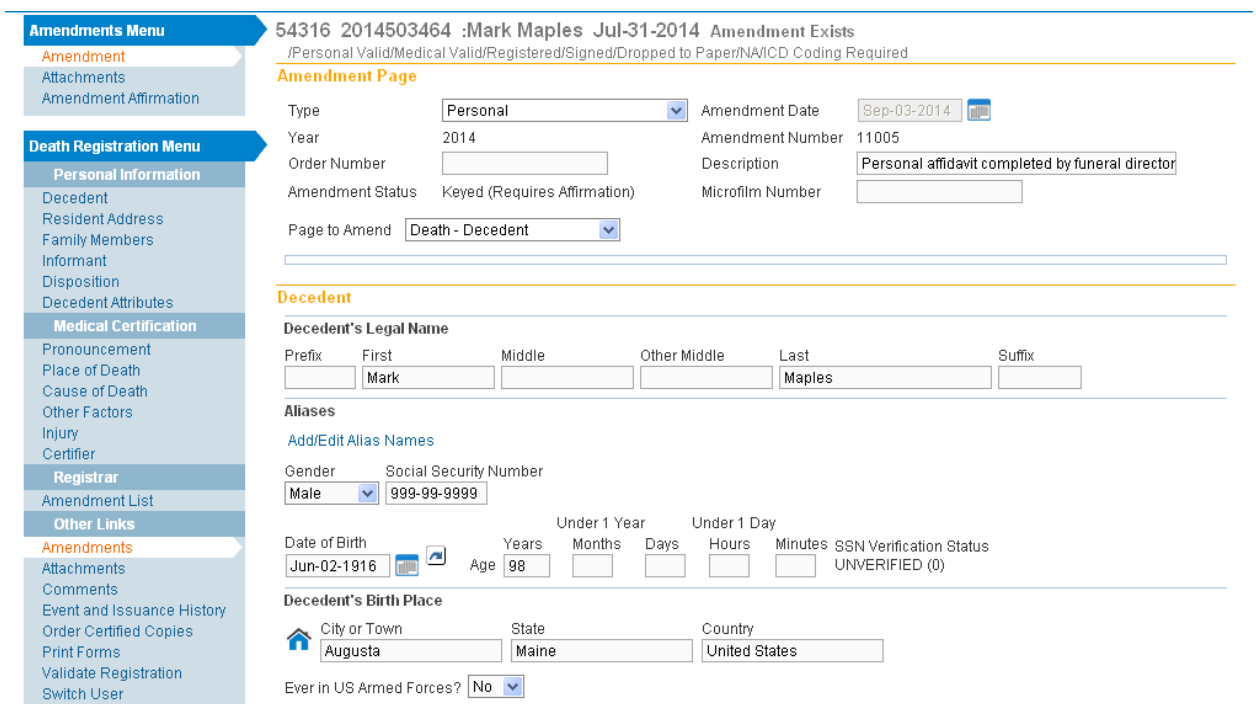
Notice the Amendment Menu will expand as shown below and the Death Registration Menu will appear.



6. From the Page to Amend dropdown, as shown below, select the registration page that needs to be corrected. In this example, select the Decedent page in order to change the Social Security Number on the record from "Unknown" to the decedent's Social Security Number.



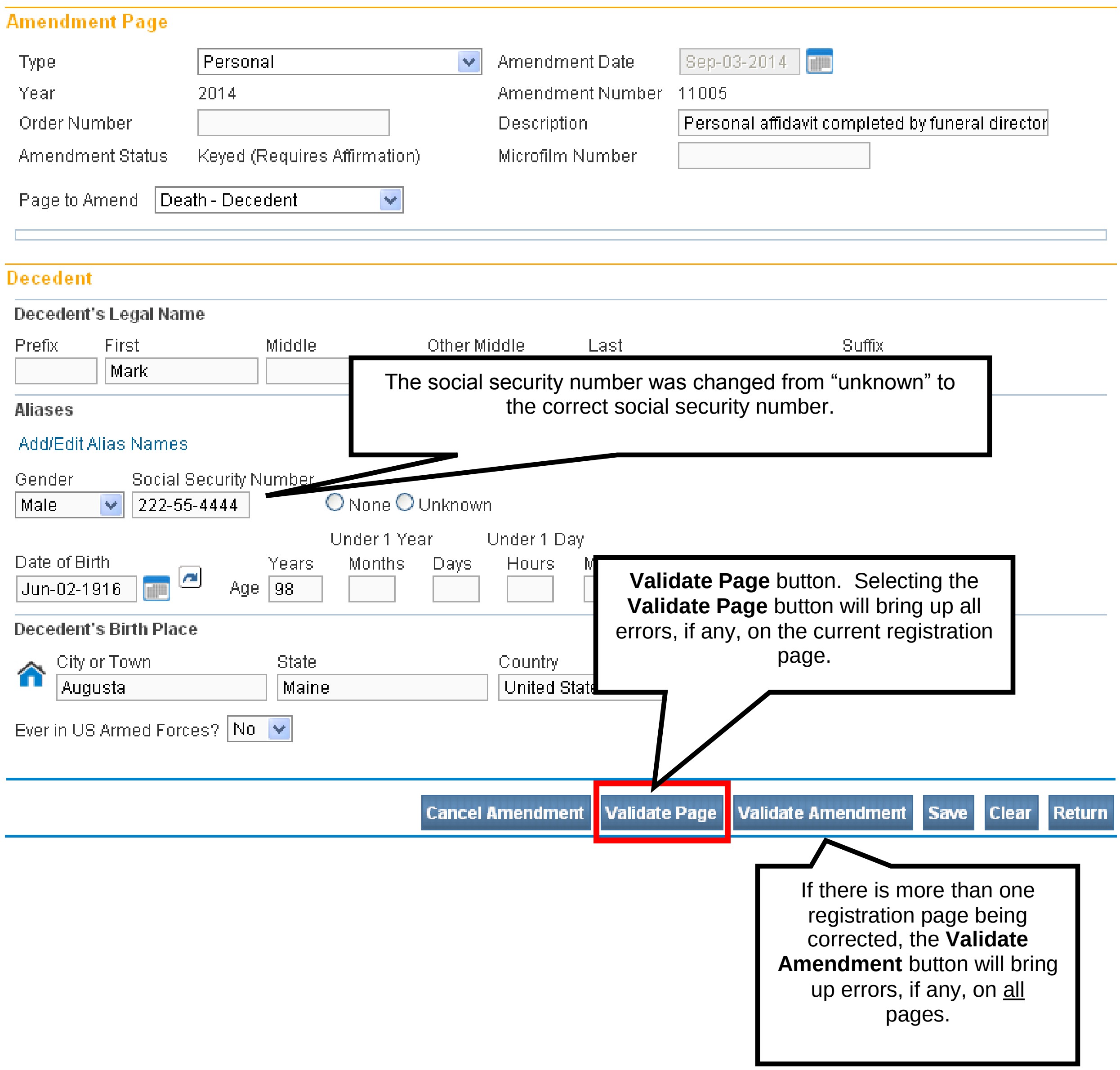
7. When the Decedent page is selected from the Page to Amend dropdown, the Decedent page will appear as shown below.



8. Click into the field that needs to be corrected. In this example, the Social Security Number field.

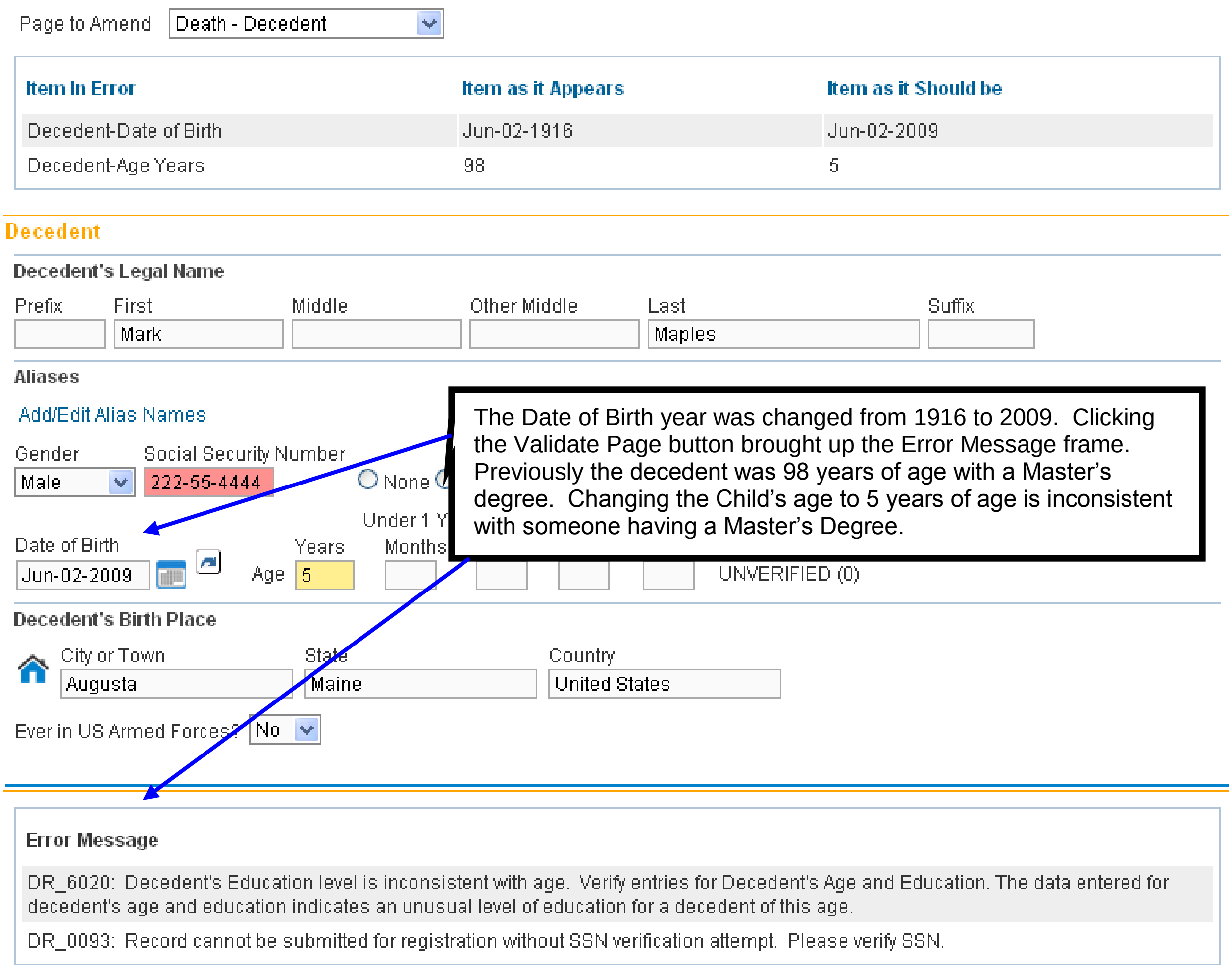
9. Type in the correct Social Security Number.

Note: The Social Security Number (SSN) cannot be verified with the Social Security Administration during the amendment process. The SSN will need to be verified after the amendment has been approved by selecting the Decedent registration page and clicking the Verify SSN link. Should the <u>amended</u> SSN be incorrect, the informant will need to provide Vital Records with the appropriate court documentation before a correction can be made.



10. Click the Validate Page button.

In the example above, clicking the Validate Page button did not bring up the Error Message frame because no other fields were affected by this change. However, below is an example where one change (Date of Birth) affected another field (Decedent's education) and, therefore, the Error Message frame pops up to notify the user there may be another field on the registration that has been affected.

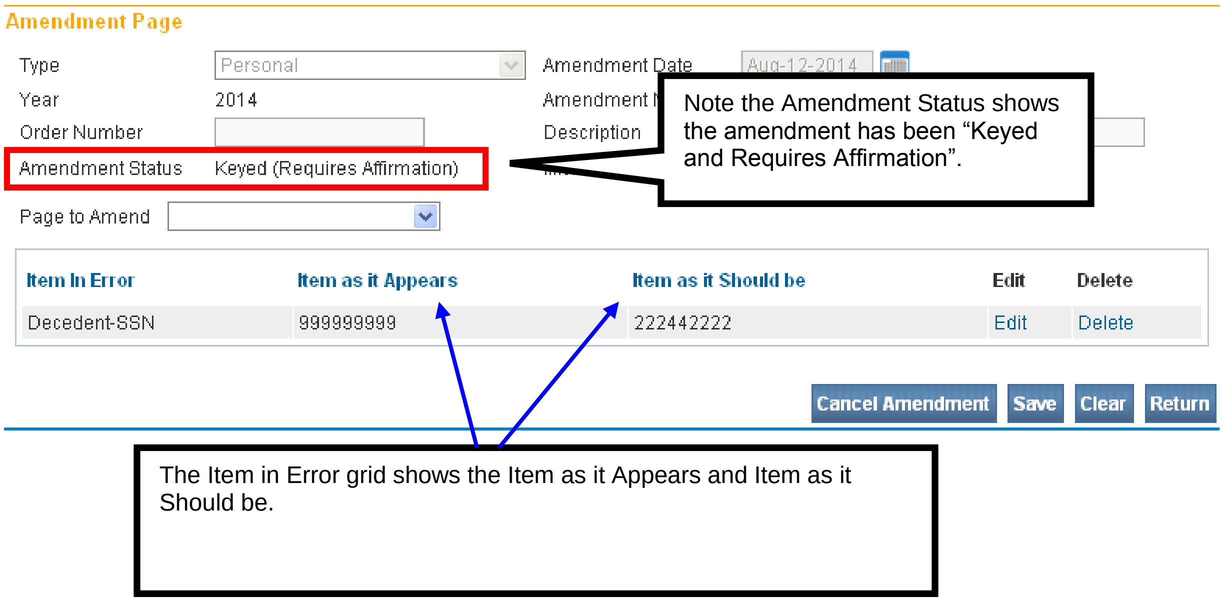


11. Fix any errors that may pop up.

12. If there are more changes required on the other registration pages, select the Page to Amend dropdown again and select the page that needs to be amended. Make the necessary changes. Then select the Validate Page button to check if there are any errors. Or, select the Validate Amendment button to validate all pages that have been changed.

13. Once all changes have been made, select the SAVE button.

The Death Registration Menu will collapse and only the Amendment Page will appear.

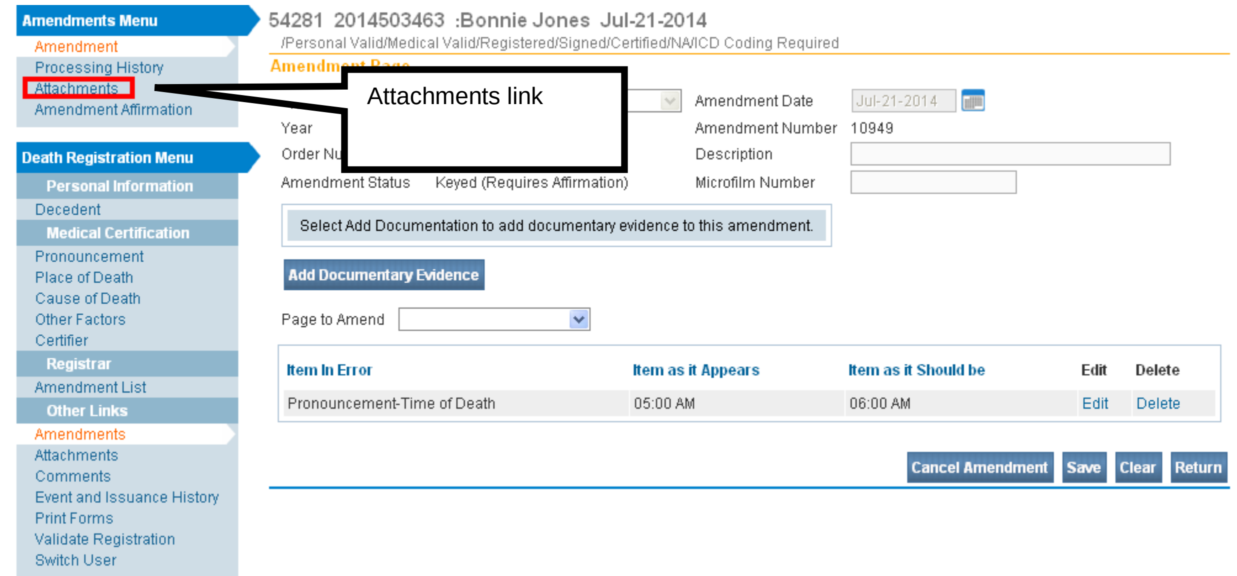


Attachments:

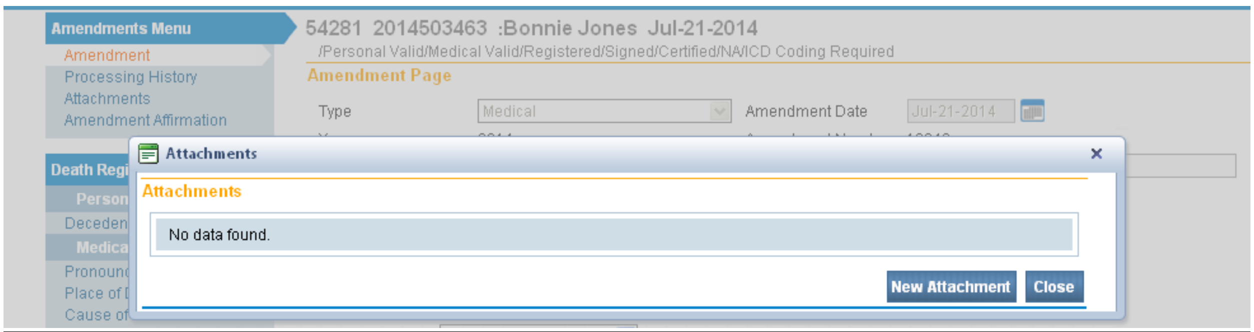
It is recommended that you attach the necessary documentation to an amendment prior to affirming the amendment. Once an amendment is affirmed by the funeral practitioner, the Vital Records office will automatically receive the request to approve the amendment. Therefore, the necessary documentation should be attached at this time.

Note: Attachments related to Amendments should be attached using the Attachments link in the Amendment Menu. Do not use the Attachment link under Other Links.

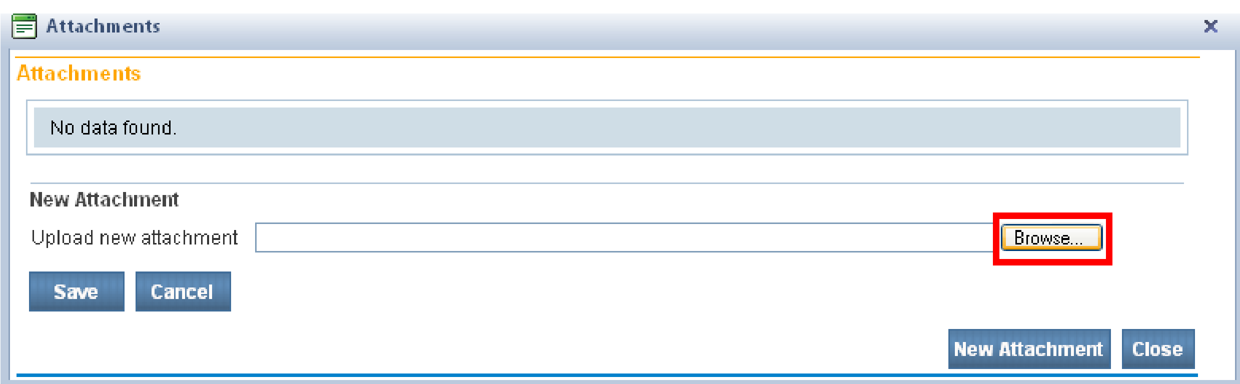
1. Select the Attachments link in the Amendment Menu to attach the VS-7. The VS-7 must be notarized, witnessed and signed.



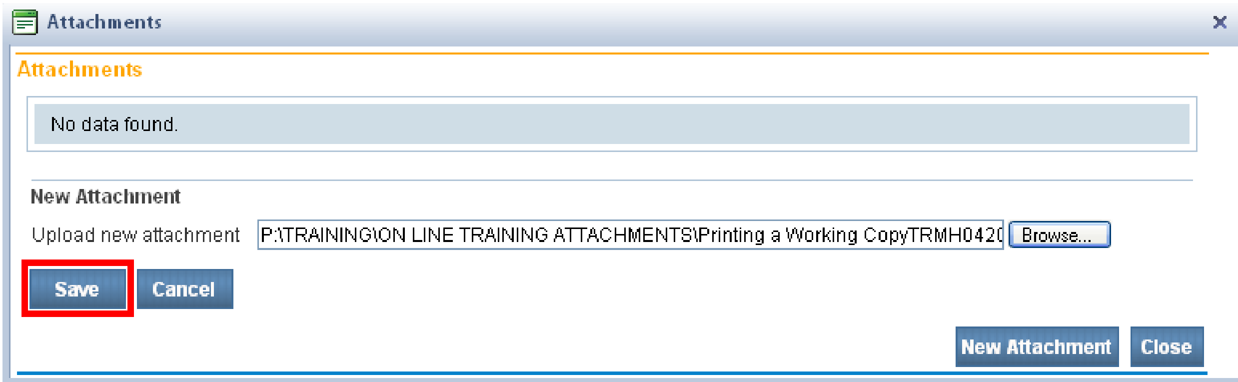
2. The attachment dialog box will open. Select the New Attachment button.



3. The Attachments window will open. Click on the Browse button to go search for the attachment in your hard drive.



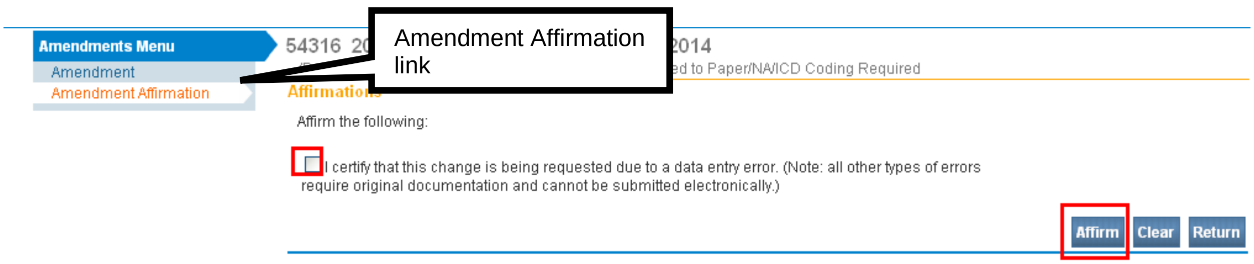
4. When the attachment has been uploaded, click the SAVE button.



Affirm the Amendment:

1. Click on the Amendment Affirmation link in the Amendments Menu.

   The Affirmation page will appear as shown below.



2. Click the affirmation checkbox.

3. Click the Affirm button.

   The Affirmation page will show “Authentication successful” as shown below.

The funeral practitioner will automatically receive an email, as shown below, indicating that an amendment has been submitted.

From: DAVE-no-reply@smtp.state.me.us
To:
Cc:
Subject: Amendment Submitted

Bill Sargent

An Amendment has been submitted for approval for: Case Id: 54316 ; Mark Maples, Date of Death: Jul-31-2014.

The Vital Records office will automatically receive the request to approve the amendment which was affirmed by the funeral practitioner.

Note: EDRS amendments submitted by the funeral practitioner will be approved or rejected within two (2) business days.

Status of Amendment:

There are three (3) methods in which a funeral practitioner can view if an amendment has been approved: 1) automated email; 2) amendment list; and 3) queues.

a) When the amendment has been approved, the funeral practitioner will receive an automated email as shown below.

From: DAVE-no-reply@smtp.state.me.us
To:
Cc:
Subject: Case 54369 Amendment Approved

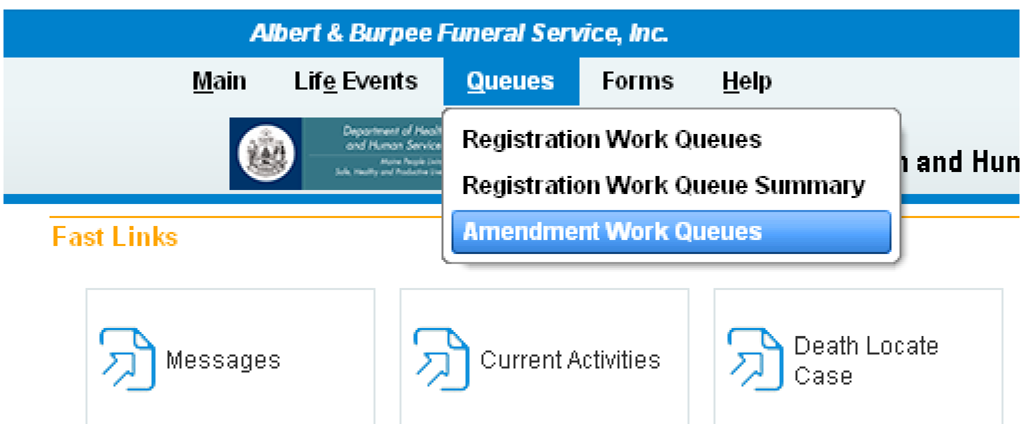
Bill Sargent

The amendment submitted for: 54369: ; Charles Caplin, Event Date: Aug-12-2014 has been Approved.

b) The funeral practitioner may also check if an amendment has been approved by opening the record and clicking on the Amendment List link (see Amendment List below). On the Amendment List page, the status "complete" will show if the amendment has been approved.

c) In addition, funeral practitioners can check their Amendment queue to see if the amendment has been approved by the Vital Records office.

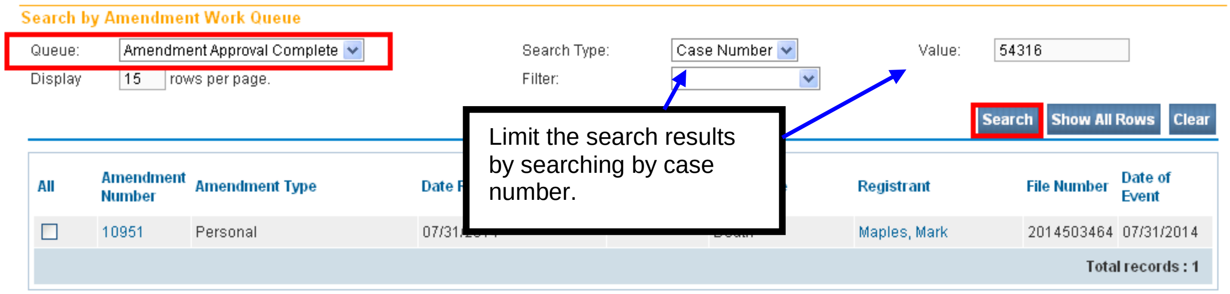
On the Home page, click on Queues>Amendment Work Queues.



Select from the queue dropdown "Amendment Approval Complete" as shown below.

Click Search.

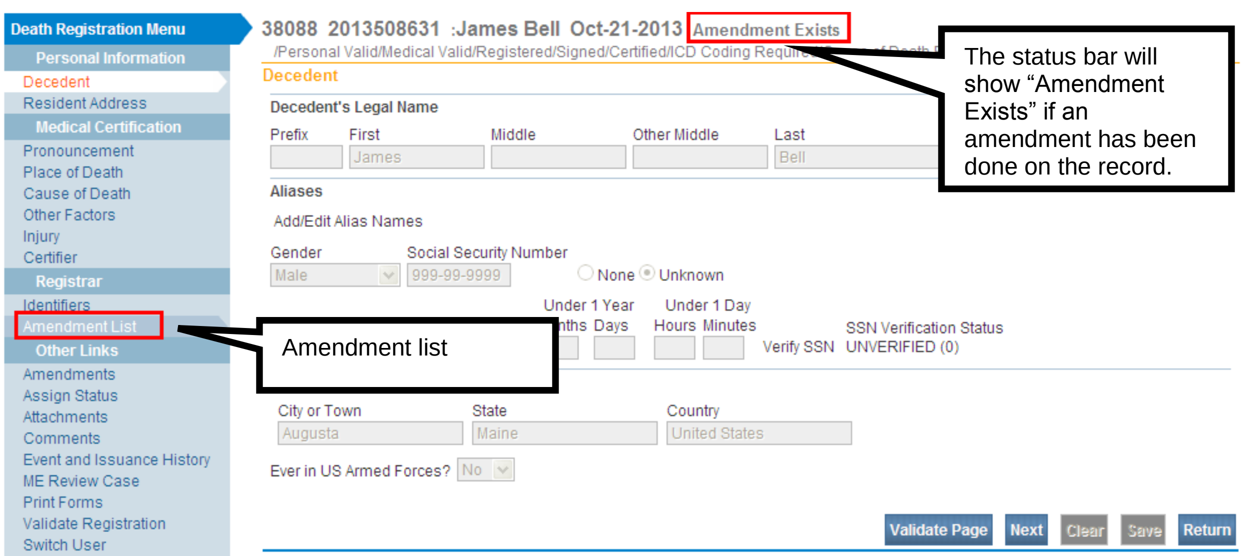
Note: To limit the number of records returned from the Search results page, select the Search Type dropdown and select "Case Number". Then, type in the case number in the Value field.



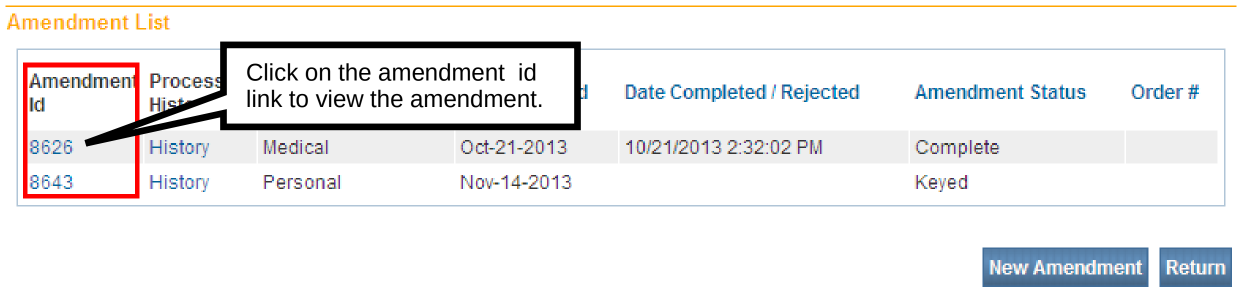
Amendment List

How to use the **Amendment List** to retrieve/view existing Amendments.

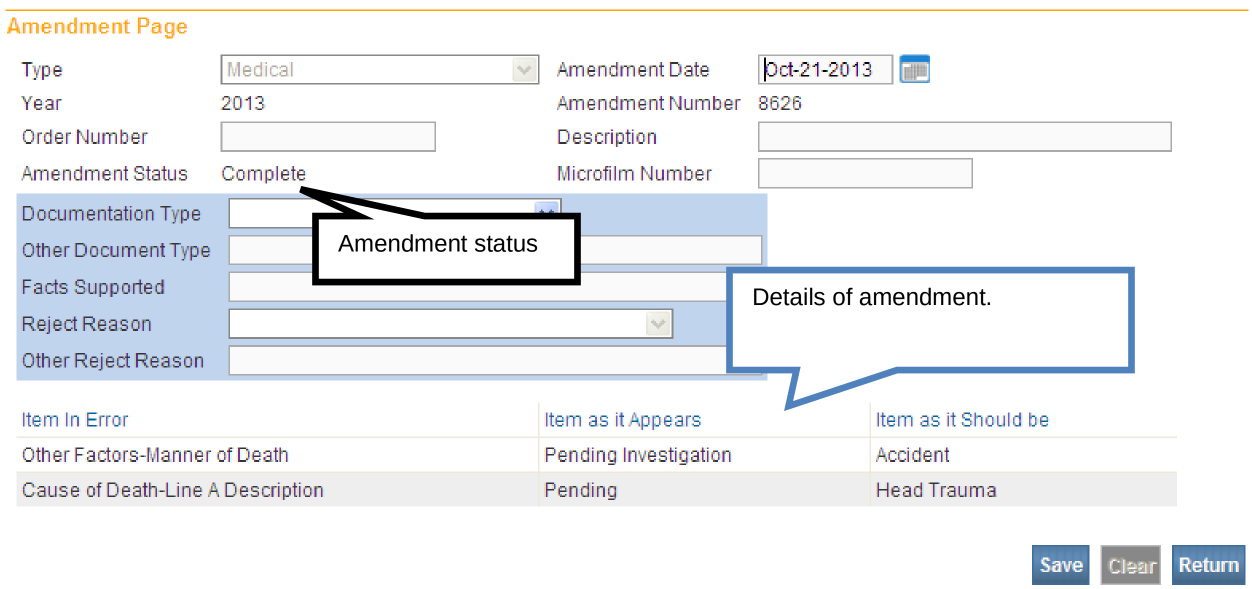
1. From within an amended record, under the **Registrar** sub-menu, select the **Amendment List** link.



2. The **Amendment List** page will display a listing of all amendments associated with the current record. Notice that the **Amendment Id** column contains links to specific amendments. Click on an **Amendment Id** link to view the amendment.



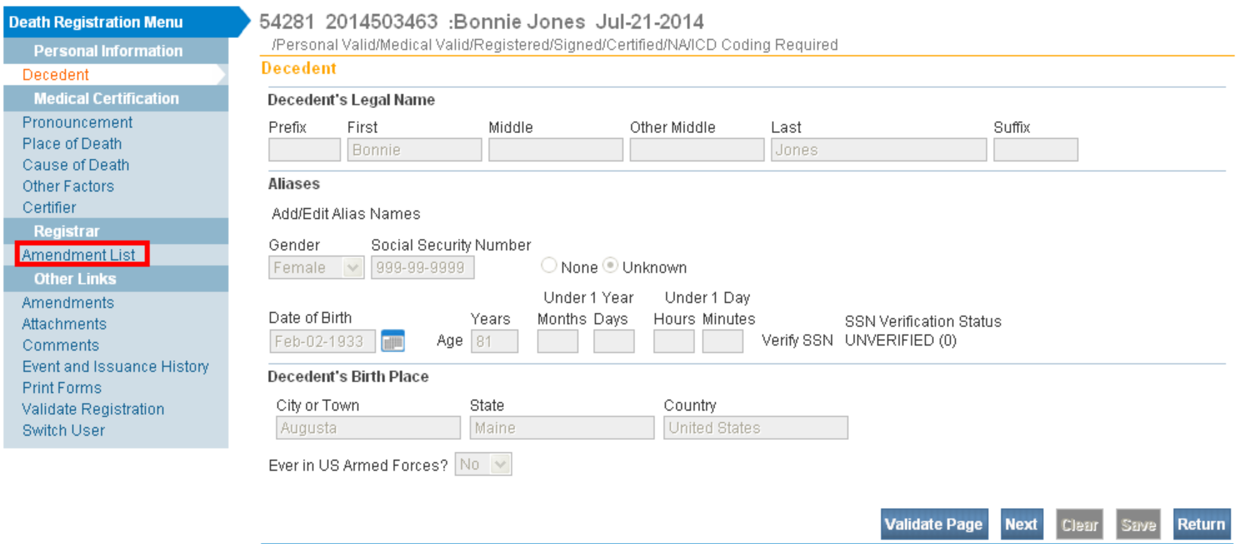
3. The **Amendment Page** will display with the details of the amendment including the **Amendment Status**.



4. Click the **Return** button to return to the **Amendment List** page.

To attach documentation to an already existing amendment – Record is closed:

1. To attach a document to an already existing amendment, open the case you wish to add an attachment. Click on the **Amendment List** link in the Death Registration Menu.



2. The Amendment List page will open.

3. Click on the appropriate Amendment ID number to open the Amendment menu.

4. Select the Attachment link. The attachment dialog box will open.

5. Select the New Attachment button. The Attachments window will open.

6. Click on the Browse button to go search for the attachment in your hard drive. When the attachment has been uploaded, click the SAVE button.

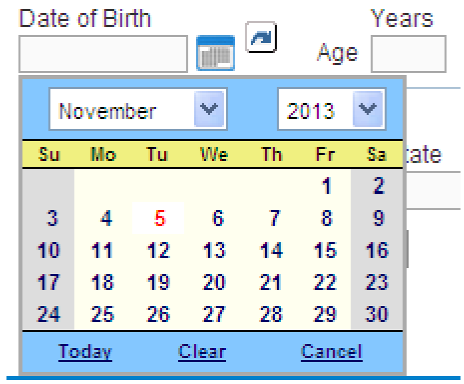
Appendices

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. Other controls, are **DAVE™** specific controls that you will not find anywhere else.

 - **Auto-populate Button** – this control 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.



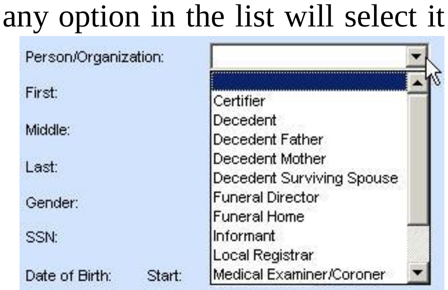
Calendar: this is an onscreen control containing several other controls. There are two dropdown lists, one for selecting the month and the other for selecting the year. The default calendar displayed will be for the current month and year with the current day displayed in red. Clicking any day of any 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 this icon will bring up the Calendar control that can be used to select a specific date.

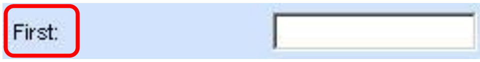
 - **Checkboxes**: these are universal, onscreen controls that can be clicked on using your mouse’s left click button. Checkboxes are used for making selections among various onscreen options. More than one checkbox can be selected at a time (compared to **Radio Buttons** that can only be selected one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

- **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, onscreen controls that can be selected from using your mouse’s left click button. Clicking the down-arrow button will cause a list of selectable options to dropdown. Clicking any option in the list will select it and display it in the text box field.



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



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

 - **Radio Buttons**: these are universal controls that can be selected using your mouse's left click button. Clicking a radio button will fill in **(●)** the 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 record 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 record someone'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.

 - **Validation Arrow-Green**: this is a display only icon. Clicking 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 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.

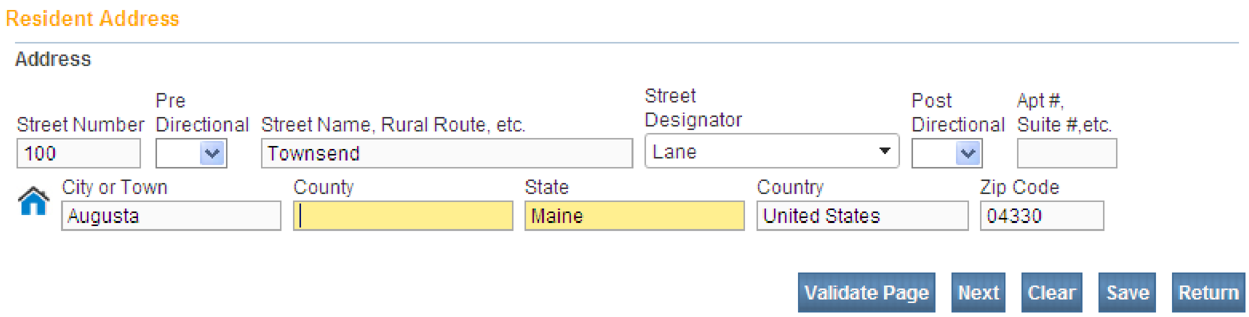
 - **Validation Arrow-Yellow**: this is a display only icon. Clicking it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DAVE™** information page contains information that may be invalid and must be corrected or overridden before certification will be allowed.

Appendix 2 – Usage and Common Conventions

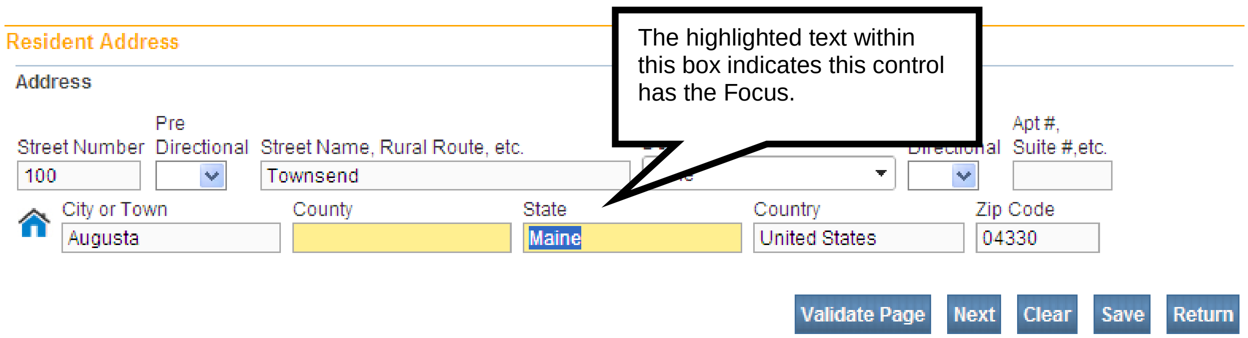
This appendix consists of useful tips and tricks to help you become a more efficient user of the **DAVE™** application. These hints will actually help you with almost any Windows based application.

1. **Focus** – **Focus** determines which field 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.

The presence of the cursor tells you that this box has the Focus.



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 checkbox or radio button.

2. **Passing the Focus** There are two ways to pass the focus to a field: clicking the field with your mouse or pressing the **Tab** key until the desired field is highlighted.

   The most common way of placing the focus on a field is by clicking the field with your mouse. This is also the slowest and least efficient way of passing the focus from one field to the next.

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

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

3. **Keyboard Shortcuts** – Now that you understand what **Focus** is and how to pass it from one field 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** 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 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 field.
- 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 field 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