

One Integrated System for All Your Vital Records Business Needs

Local Health Department Training Exercises

October 2020

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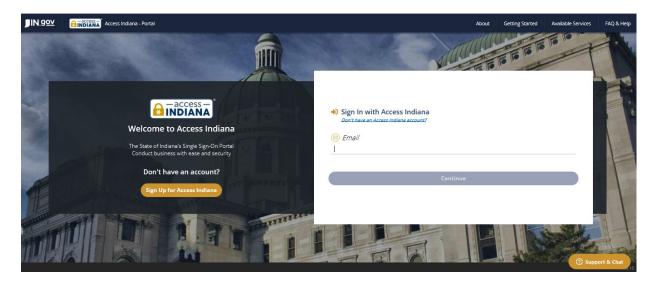


Logging Into the DRIVE Application

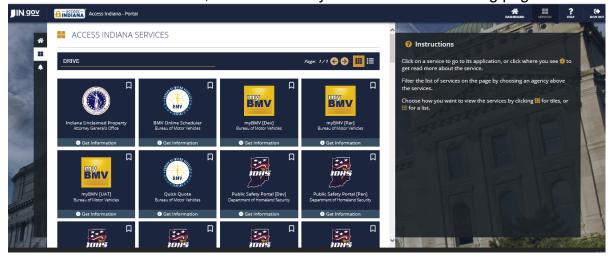
Exercise 1: Logging Into DRIVE

Skills Learned: in this exercise, you will learn how to log into the **DRIVE** (Database Registration of Indiana's Vital Events) Application:

- 1. You will access **DRIVE** through Access Indiana: https://www.in.gov/access/. Select the Access Indiana icon on your desktop or select the Access Indiana Favorite (Bookmark) from within your web-browser.
- 2. Enter **Email** and select **Continue**.

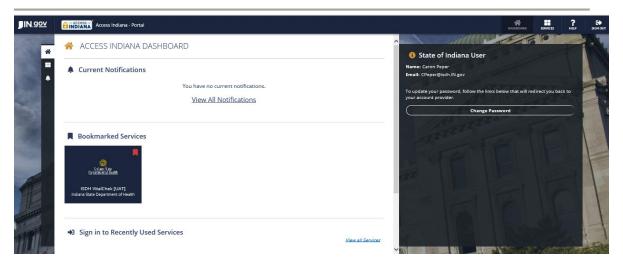


3. Click the **DRIVE** icon, and it will take you to the **DRIVE** landing page.

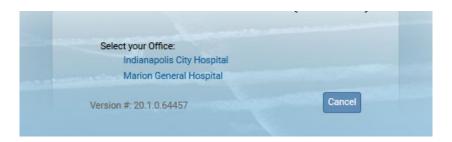




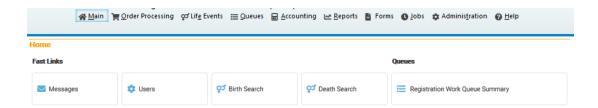




4. If your **User Name** is associated with more than one office or location, then you must also make a selection from the **Office:** dropdown list, shown below:



You should now be logged into the **DRIVE** application where the **Main Menu** and **Fast Links** sections are displayed:







Exercise 2: The Messages Pane

Skills Learned: Basic Navigation within the Messages pane

One fast link that appears when you first login to the **DRIVE** application is the **Messages** Link. Some **Messages** are messages sent from User to User, while others are system generated and appear with no interaction from the user.

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

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



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





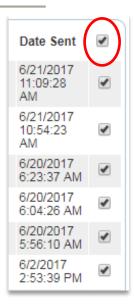


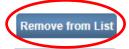
3. Place a checkmark in the checkbox next to the **Date Sent** column header.

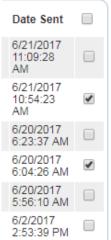
Notice that the **Remove from List** button is now active.

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

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







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

Now click the **Remove from List** button to remove a single message from the list.

Again, once removed, messages cannot be restored.

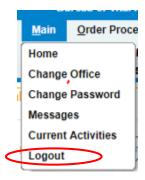




Exercise 3: Logging out of the DRIVE Web-Base Application

Skills Learned: Logging out of the **DRIVE** application. Logging out of **DRIVE** will **NOT** log you out of Access Indiana.

From the Main Menu select Main -> Logout.



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



You can also directly select the **Logout Button**, always displayed and located in the far upper right of the screen.



If you select this option for logout, you will not be receive the "Click OK to exit application" prompt. You will simply be logged out.

3. Logging out of **DRIVE** will **NOT** log you out of Access Indiana.





General Registration Page Functionality

Page Controls and Navigation

Skills Learned: In these exercises you will learn how to navigate through **DRIVE** using the various controls and icons provided. Mastery of these controls will speed you on your way to more efficient record processing. The following exercises are designed to help you gain that mastery.

Exercise 1: Dropdown Lists

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

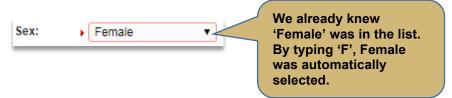
1. One of the first dropdown lists you are likely to encounter is the **Sex** dropdown list on the main **Start/Edit New Case** page. To view all items in the list simply click on the down-arrow on the right side of the control.



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



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



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





4. Once the list is highlighted, it is possible to navigate up and down through the list using the directional arrow keys on your keyboard. You can tell a list is highlighted by the blue shading that is placed around the outside of the field.

Not Highlighted:	Highlighted:	Sex: Female	₹ .	
With the list highlighted and 'Femal your keyboard.	e' selected, press the	e down-arrow Sex:	button on Female	v
Pressing the down-arrow with 'Fem down the list to 'Male'. Now press to	0 0	ls Sex:	Male	•
Pressing the up-arrow with 'Male' h up the list to 'Female'.	ighlighted scrolls bac	sk Sex:	Not Yet Determi	ined ▼



Exercise 2: Standard Date Format

Skills Learned: In this exercise you will learn how to properly key dates into the **DRIVE** system. While processing death registrations, you will frequently be inputting dates. **DRIVE** allows you much flexibility in using several different date formats:

Input Formats	Typed As:	System Converts to:
MM-DD-YYYY	02-05-2014	Feb-05-2014
MM/DD/YYYY	02/05/2014	Feb-05-2014
MMDDYYYY	02052014	Feb-05-2014
MonDDYYYY	Feb052014	Feb-05-2014
Mon/DD/YYYY	Feb/05/2014	Feb-05-2014
Mon-DD-YYYY	Feb-05-2014	Feb-05-2014

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

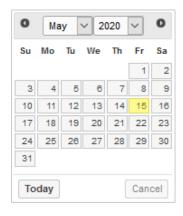




Exercise 3: Using Calendars

Skills Learned: In this exercise you will learn how to use the **Calendar control** to input dates without typing them in manually.





- 1. In addition to manual date entry, you can also click on the **Calendar icon** next to a date entry box to bring up a **Calendar control**.
- 2. By default, the current Month, Day and Year are pre-selected. The current month is pre-selected in the Month dropdown list, the current year is pre-selected in the Year dropdown list and the current day is highlighted in red. As with other drop-down lists we have seen, clicking on the down-arrow next to the month control (January, in this example) will reveal all the items in the list.
- 3. Once we have selected the correct Month and Year, clicking on the Day of the month will auto-populate the Date for us.

In addition to manually dropping down the list, we can just type the first letter of the month we are interested in or use the up and down arrows on the keyboard to scroll through the list until we find the month we want to select.

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





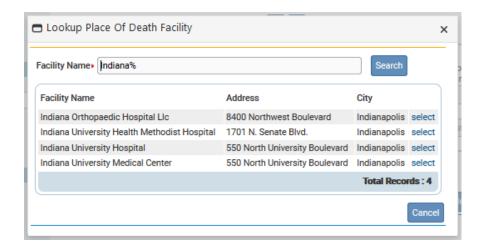
Exercise 4: Lookup Controls

Skills Learned: In this exercise you will learn how to use **Lookup Controls**. **Lookup Controls** are searchable lists that display a grid of selectable data. **Lookup Controls** are all labeled, so you will know one when you see it.

- 1. The **Lookup Icon** is a control displayed as a small magnifying glass next to fields in which a lookup can be performed. Wherever a **Lookup Icon** is displayed a **Eraser Icon** control is also displayed.
- 2. Selecting the Lookup Icon will display a pop-up control to search for a lookup the value that should be entered into the select field. For example, selecting the Place of Death Lookup Icon, will display the Lookup Place of Death Facility pop-up.



3. A Facility Name is should be entered into the search field. Wildcard searches can be utilized for Lookups. Simply enter a % at the end of the search criteria to perform a wildcard search. In the below example I entered "indiana%" and selected Search, which returned a data grid of results for facility names which start with "Indiana".







4. From the data grid list, select a facility. Notice that all of the controls on the **Place of Death page** have now been auto-filled.

Place Of Dea	th					
Type of place o	f death Hospital-Eme	rgency Room/Outp	oatient V Other Specify			
Facility Name Indiana Orthopaedic Hospital Llc						
Address						
Street Number	Pre Directional Street Nan 8400 Nor	ne or PO Box, Rural thwest Boulevard	Route, etc. Street Designator	Post Apt #, Directional Suite		
Zip Code	City or Town	County	State	Country		
	Indianapolis	Marion	Indiana	United States		

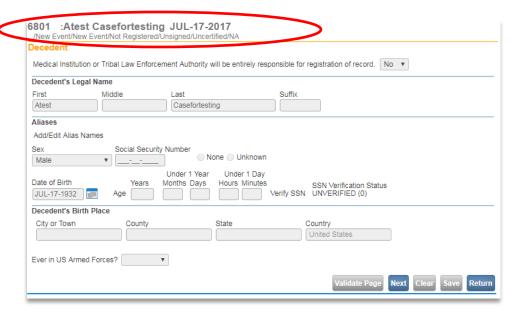




Exercise 5: Registration Status Bar

Skills Learned: In this exercise you will learn about the **Registration Status Bar**. This helps you track missing data that can prevent a record from being properly registered. It's also a valuable tool for tracking the status of a case.

1. The **Registration Header** can be viewed from any of the pages of information in the **Death (or Birth) Registration Menu**. Simply locate the blue bar at the top of the information window that displays the case number, decedent (or child's) name and date of death (or birth).



2. The **DRIVE** application provides work flow and data quality management through assignment of statuses. The registration process involves many steps completed by several parties. To track these steps, the **DRIVE** system assigns one or more statuses to the record when an action is performed (e.g. select the validate page button) or event occurs (e.g. cremation clearance required).

The initial status assigned to a new electronic case is **New Event/New Event/Not Registered/Unsigned/Uncertified/NA**. (The status shown in the example above.) The goal of all parties in the registration process is to obtain a 'perfect' status. A perfect status would indicate the highest data quality and completion of all steps in the registration process. Sometimes a death record may contain values which are valid however cause soft edit rule failures, therefore it is also possible to have a registered record have a Personal Valid with exceptions or Medical Valid with exceptions status or any combination of valid and valid with exceptions.

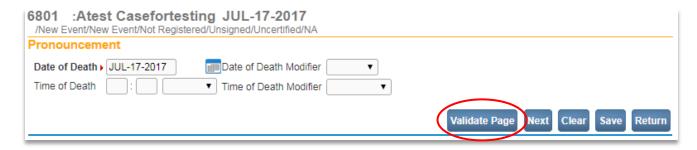




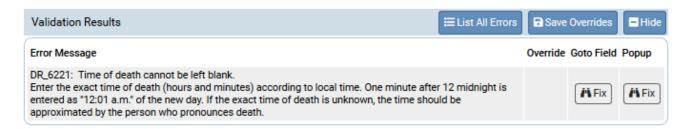
Exercise 6: Validate Page and the Validation Frame

Skills Learned: In this exercise you will learn how to validate death records and prepare them for registration.

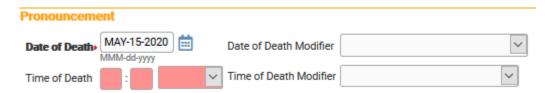
1. Once you've entered information into the system you can validate that information by clicking on the **Validate Page** button.



When you click on the **Validate Page** button, the **Validation Frame** will list all of the errors associated with that page. The list of Validation Results specific to data entry issues regarding the page will be displayed directly below the *Validate Page*, *Next*, *Clear*, *Save* and *Return* buttons.



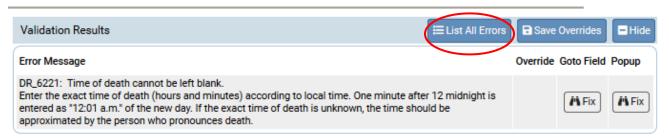
The fields on the specific page which contain errors will be highlighted. Those highlighted in red must be corrected before the record can be signed or certified and registered.



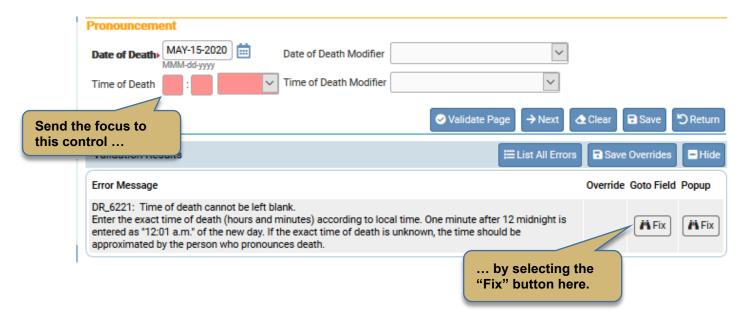
2. If you click on the **List All Errors** button the system will display all errors associated with the entire death case, including those errors which exist for the current page.







- 3. Notice that the **List All Errors** button has now become the **List Page Errors** buttons. Clicking this button will reduce the list to those errors associated only with the currently displayed page.
- 4. If you want to hide the displayed list of errors then just click on the **Hide** button. Just re-click on the **Validate Page** button to view the errors again.
- 5. To fix an error, click on the button in the Goto Field column. This will place the cursor or focus in the field that needs to be corrected. Use this option if you are on a page with many errors to correct.

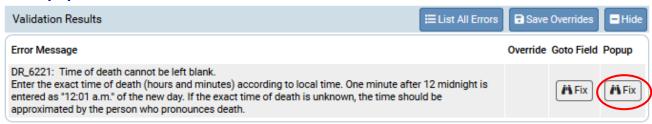


'Focus' determines which onscreen element is the target of action. If a text box 'has the focus' then anything typed on the keyboard appears in the text box. If a dropdown list 'has the focus' the down-arrow will open the list and the up-arrow will close the list.

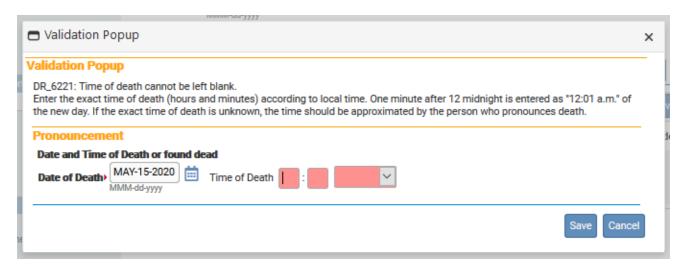




6. Another method of correcting mistakes is to click on the **Popup** column... button in



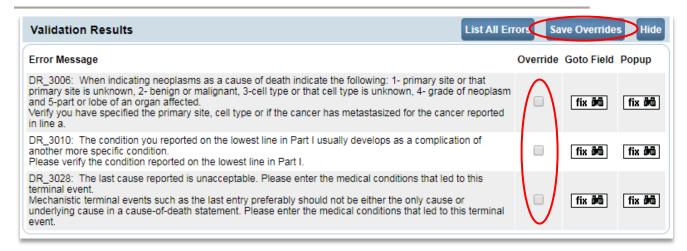
...to launch a popup window containing the error to be corrected:



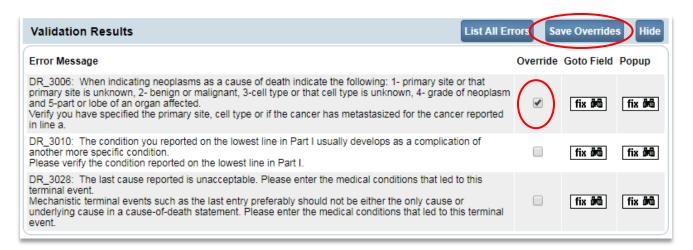
- 7. Correct the error and click the **Save** button to submit your changes. The popup will close and your changes to the item will now be displayed on the page. Click the **Close** button if you want to close the popup without making any changes.
- 8. Sometimes, a death registration can be processed even with certain errors present in the registration. In those cases, a checkbox will be provided in the **Override** column.







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

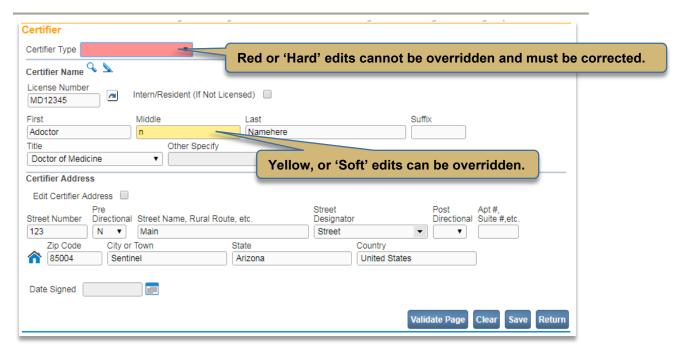


Important Note: Not all errors can be overridden!

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







You may have noticed that certain pages on the Death Registration Menu are marked with either a red x, yellow o caution sign or green checkmark.

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



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

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

Pages marked with a green arrow **▼** contain no errors.

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



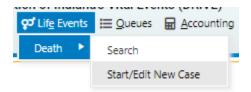


Death Module

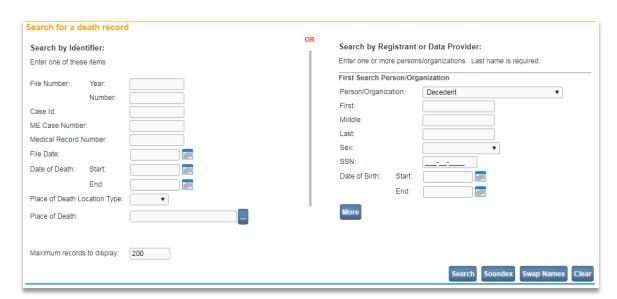
Exercise 1: Search for a Case

Skills Learned: In this exercise you will learn how to locate cases in the **DRIVE** system.

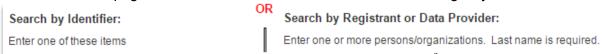
The **Search** page is used by State and County offices to locate registered and unregistered cases. These cases can be opened for review, editing or amending purposes.



- 1. From the DRIVE Main Menu, select Life Events -> Death -> Search:
- The Search page offers many identifiers on which to base a search.



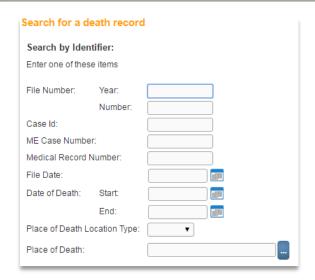
3. The Search page allows the user to choose between two differing ways to search:



4. **Search by Identifier** Designed to return results based on case-specific record data such as *File Number*, *Case Id*, *ME Case Number* or *Medical Record Number*. Searching by this data will most often return a single record.







Search By File Number: A file number is composed of two elements: *Year* and *Number*.

- Year is the year in which the death occurred (4 digits).
- *Number* is the unique 6 digit number assigned to the record upon registration by **DRIVE**. The combination of both numbers comprise the State File Number (SFN). Both numbers are required in order to perform a search by File Number.

Search By Case ID: This is a unique number **DRIVE** assigns each case once it's been created and saved regardless of registration status.

Search By Coroner Case Number: This is the unique number assigned by the Coroner. Not all cases will have an *Coroner Case Number* as not all cases are worked on by the Coroner.

Search By Medical Record Number: This is the unique number assigned by the medical certifier. Not all cases will have a *Medical Record Number* as it is not a required field in DRIVE™

Search By File Date: This is the date on which the case officially received a "Registered" status. Any case filed on a particular date will be returned when searching by File Date.

Search By Date of Death: By using the *Start* and *End* dates, **DRIVE** will return all cases with the range entered. If only a *Start* date is entered, **DRIVE** will look for all cases that match the exact date entered in the *Start* field.

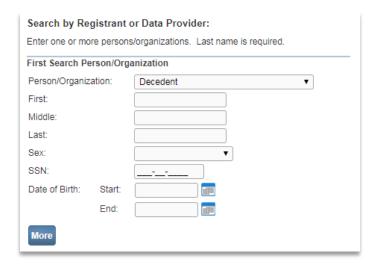
Search By Place of Death: Used in conjunction with *Place of Death or Place of Delivery* to determine whether the search should be executed based on County or City of registration.



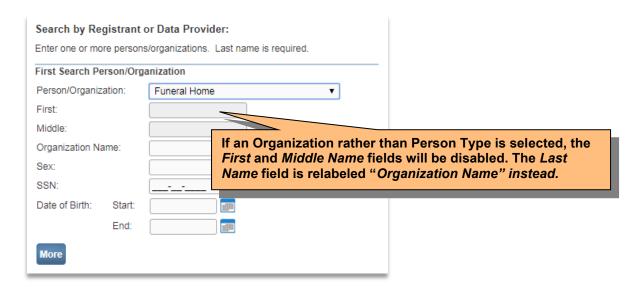


Search By Place of Death: Select the Place Lookup icon to choose from a list of County or City locations based on the selection made in *Place of Death* or *Delivery* location type. A direct manual entry can also be made.

5. The **Search by Registrant or Data Provider** is designed to search on a wider array of record data such as *Registrant Name, Facility Name, Medical Certifier Name, or Mother or Father Name.*



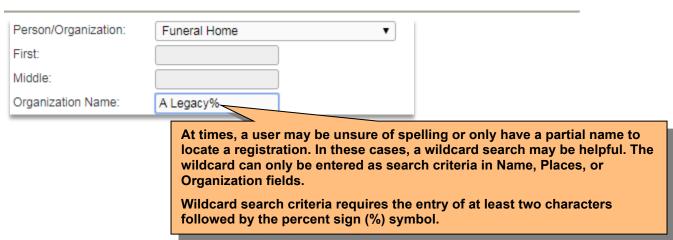
6. Select the type of **Person/Organization** for which search criteria will be provide. In this exercise we will select **Funeral Home**.



7. Enter an Organization Name and then select search.



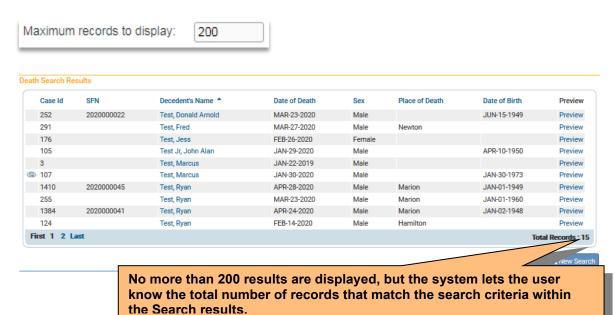




8. Select the **Search** button to perform the search.

The 'More' button can be selected to add additional search criteria.

The maximum records to display is set at 200, meaning only 200 results will be returned when the search is performed.



8. The **Death Search Results** page is used to retrieve records that have been started and need to be reviewed/edited. Locate and click the **Preview** link in the far right column of the **Results** window. Clicking on this link will open a preview pane that provides a brief summary of the record.

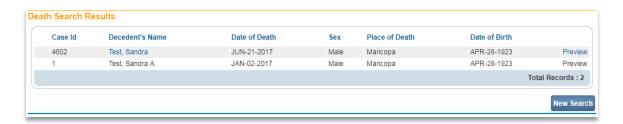






- 9. If, after examining the preview pane, you are confident that you have located the desired record, then click on the decedent name link in the **Decedent's Name** column to open the record for review and/or editing.
- 10. With the record open, it can now be reviewed and/or edited.
- 11. Another feature of the **Search** page is the **Soundex** button. Using **Soundex** you can locate records even when you are unsure of the spelling of the decedent's name.

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





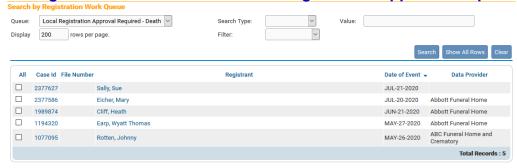


Exercise 2: Local Registration Approval Required (Accept for Filing)

Skills Learned: In this exercise you will learn how to approve a local registration in the **DRIVE** system.

The Local Registration Approval Required (Accept for Filing) feature allows the LHD to approve a case that has been signed and certified.

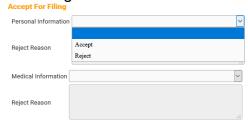
1. To determine what records are ready for approval, Select Queues > Registration Work Queue > Local Registration Approval Required - Death



- 2. Select the Case Id to enter the record of choice.
- 3. **QUICK TIP!** Reviewing each registration page is recommended, but reviewing the **Disposition** page is <u>required</u> before continuing.
- 4. Under the Registrar Menu the "Accept for Filing" page link displays



 Select the Accept for Filing link to enter the Accept for Filing page. Select to Accept or Reject the Personal Information and the Medical Information. Enter a Reject reason if Reject is selected. Select the Save button to save the changes.







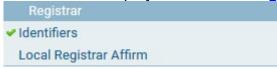


Exercise 3: Local Affirmation Required (Local Registrar Affirm)

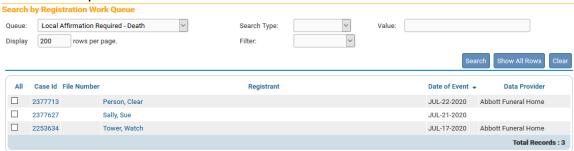
Skills Learned: In this exercise you will learn how to Affirm a Local Registration in the **DRIVE** system.

The Local Affirmation Required (Local Registrar Affirm) feature allows the LHD to affirm a record where the Local Registration has been Accepted for both Personal and Medical. This process will register the record.

 Once the Accept for Filing process (Exercise 3) has been completed and both Personal and Medical has been accepted, the Local Registrar Affirm page link will be displayed under the Registrar Menu.



 To determine what records are ready for affirmation, Select Queues > Registration Work Queue > Local Affirmation Required - Death. Note: This same step will also work for the Birth module.



Select Case Id for the record of choice. Select the Local Registrar Affirm link.
 Select the affirmation checkbox and the Affirm button to complete registration.



4. A **Death Certificate printing** popup message displays. To print the Death Certificate **select OK**. To leave without printing, select **Cancel**.





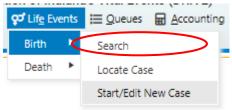
Birth Start/Edit New Case

The first step in entering a new record is to perform a search. This is necessary to prevent or minimize the creation of duplicate records. Outlined below are the steps involved in starting a new birth registration record.

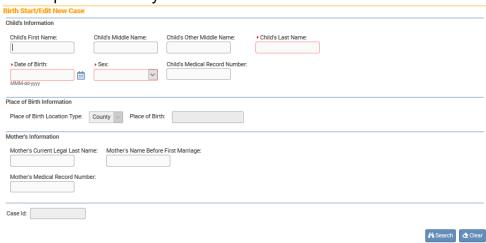
Exercise 1: New Birth Registration

Skills Learned: How to start a new birth registration.

1. From the Main Menu, select Life Events -> Birth -> Start/Edit New Case.



2. This will bring up the **Start/Edit New Case** page. Notice that **Child's Last Name:**, **Date of Birth:**, and **Sex** are all marked with red arrows (). Fields outlined in red and with a red arrow next to them are **required entries** and must be completed before you will be allowed to start a new case.



Note: Before you will be allowed to create a new Birth Record you must first search for an existing record. This is to prevent the creation of duplicate records.

3. Once you have completed the required items, click the **Search** button to proceed or the **Clear** button to clear all entries and start over.

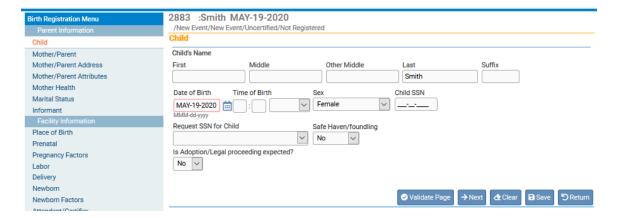




- 4. If no matching records are found, you will be allowed to begin creating a new record by clicking the **Start New Case** button. To begin a new search, click the **New Search** button.
- 5. If a matching event was found, click on the underlined link in the **Child's Name** column to open the record.



6. For this exercise, select **Start New Case**. The **Main Menu** will collapse and the **Birth Registration Menu** will open, displaying the **Child** page:





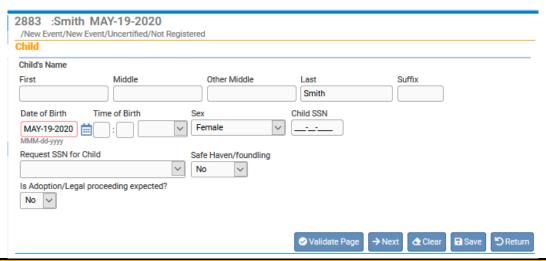


Exercise 2: The Child Page

Skills Learned: How to complete the Child page.

The **Birth Registration Menu** is composed of several sub-menus. The first sub-menu is the **Parent Information** menu. The pages in this menu are used to gather information Child, the Mother, and the Father. The first page in the **Parent Information** sub-menu is the **Child** page.

1. The first step in completing this page is to complete the **Child's Name** tab. Enter at least the child's **First** and **Last** names.



Note: If the mother is not married, the child's last name MUST be mother's last name. A Paternity Affidavit, done in a later step or at a later time, will permit the last name to be changed, if parents desire.

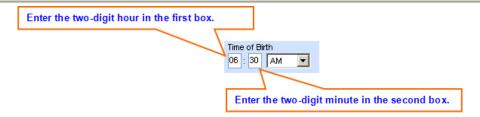
2. **Date of Birth** is marked with a red outline, indicating that this is a required item. This should auto-populate due to the original search entry. If it does not, or you need to edit it, enter the date manually or use the Calendar icon () to launch the Calendar Control.

Note: If the date of birth of the infant is not known because the infant is a foundling, enter the date the infant was found as the date of birth.

3. **Time of Birth** consists of 3 controls: 2 number entry boxes and one **AM/PM** dropdown list. In the first number entry box enter the 2-digit birth hour. For example, if birth occurred at 6:30 am, enter '06' in the first number box.







In the second number entry box enter the 2 digit minute at which birth occurred. If the birth occurred at 6:30 am, enter '30' in the 2nd number box. To complete the Time of Birth entry, make a valid selection from the AM/PM dropdown list.

- Sex make a selection from the dropdown list.
- 5. If the **Child's SSN** is known, enter it here. In most cases, however, the Child's SSN will likely be left blank.
- 6. Request SSN for Child make a selection from the dropdown list.
- 7. If the child is a foundling, select **Yes** from **Safe Haven/Foundling** dropdown list. Otherwise, select **No**.

Lastly, make a selection from the Is infant to be Adopted? dropdown list.

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

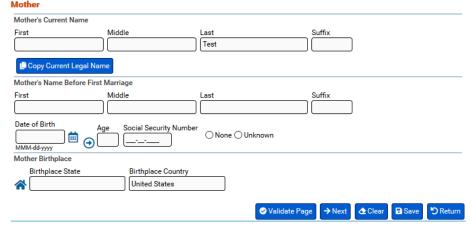




Exercise 3: The Mother Page

Skills Learned: How to complete the **Mother** page. The **Mother** page is used to capture data relevant to the newborn's mother.

- 1. In the **Mother's Current Legal Name** tab, enter mother's current **First**, **Middle**, and **Last** name. If the mother uses a **Suffix**, include it here, as well.
- 2. In Mother's Last Name Before First Marriage (Maiden), enter mother's birth name, including any suffixes. An override-able error will occur if the mother's current Last name and Last name before first marriage are the same.



- 3. Date of Birth enter the mother's date of birth manually or use the Calendar icon () to launch the Calendar Control. After entering the Date of Birth, click the auto-populate () button to complete the Age control.
- 4. Enter the mother's **Social Security Number**.

None – selecting the radio button for "None" will system-fill the Social Security Number with zeros, indicating Mother does not have a social security number.

Unknown – selecting the radio button for "Unknown" will system-fill the Social Security Number with nines, indicating you do not know Mother's SSN.

- 5. The **Mother's Birth Place** control is used to capture the mother's **Birthplace State** and **Birthplace Country**.
- 6. Click the **Validate Page** button to check this page for errors, **Next** to proceed to the **Mother Address** page, **Clear** to clear all entries, **Save** to save changes without leaving this page, or **Return** to return to the **Main Menu** or **Search Results** page.

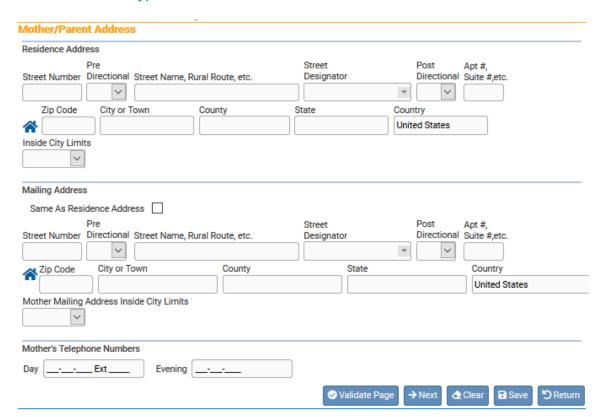




Exercise 4: the Mother/Parent Address Page

Skills Learned: How to complete the **Mother Address** page. The **Mother Address** page is used to capture the mother's residence and mailing addresses. **DRIVE** uses a shortcut button that can greatly simplify this process.

- 1. First, manually complete the **Physical Residence Address**. While most of this page is self-explanatory, please make note of the **Pre-Directional** and **Post-Directional** dropdown lists.
 - a. If the street address has a **Pre-Directional** indicator, i.e. *East* 42nd St. then indicate that by selecting "E" from the **Pre-Directional** dropdown list. Do **NOT** type the **Pre-Directional** indicator in the **Street Name** text box.
 - b. If the street address has a **Post-Directional** indicator, i.e. East 42nd St. *SW*, then indicate that by selecting "SW" from the **Post-Directional** dropdown list. Do **NOT** type the **Post-Directional** indicator in the **Street Name** text box.



- Make a selection from the Inside City Limits dropdown list.
- 3. If the mother's mailing address is the same as her residence address, then click the **Same As Residence Address** box in the middle of the page. This





will automatically copy the residence address information to the **Mailing Address**. Once selected, the mailing address will be disabled.

- 4. If the two addresses are different, then manually complete the **Mailing Address** tab.
- 5. Enter the **Mother's Telephone Numbers**.
- Click the Validate Page button to check this page for errors, Next to proceed to the Mother Attributes page, Clear to clear all entries, Save to save changes without leaving this page, or Return to return to the Main Menu or Search Results page.

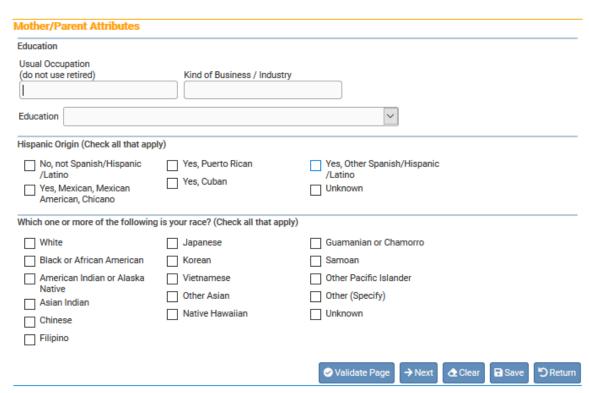




Exercise 5: the Mother Attributes Page

Skills Learned: How to complete the **Mother Attributes** page. The **Mother Attributes** page is used to gather demographic information related to the newborn's mother. This information is used in reporting at the State and Federal level and can be instrumental in obtaining funding for various programs.

- Enter Usual Occupation and Kind of Industry of the mother.
- 2. **Education**: make a selection from the dropdown list.
- 3. The **Hispanic Origin** tab is used to indicate whether the mother is of Hispanic descent. Click one or more applicable box or boxes, as needed. Multiple selections are permitted.
- 4. Selecting the 'Yes, Other Hispanic Origin (specify)' checkbox will cause a new text entry control to appear on-screen. Use this control to specify the other Hispanic descent information.



 The Which one or more of the following is your race? controls also allow for multiple selections. Select all checkboxes that the mother considers applicable.





- 6. If the mother is of American Indian descent or an Alaskan Native, select the checkbox as shown below. Selecting American Indian or Alaska Native (specify tribe) will cause the page to refresh and display two dropdown lists.
- 7. Select mother's specific tribe(s) using one or both of the dropdown lists.
- 8. Selecting the Other Asian (specify), Other Pacific Islander (specify), or Other (Specify) checkboxes will cause two new text entry controls to appear. At least one of these must be completed before registration will be permitted.
- 9. Click the **Validate Page** button to check this page for errors, **Next** to proceed to the **Mother Health** page, **Clear** to clear all entries, **Save** to save changes without leaving this page, or **Return** to return to the **Main Menu** or **Search Results** page.





Exercise 6: the Mother Health Page

Skills Learned: How to complete the **Mother Health** page. This page is used to gather statistical data relative to mother's health and personal habits.

1. **Did Mother get WIC food for herself during this pregnancy?** – make a selection from the dropdown list.

Mother Health	
Did Mother get WIC food for herself during this pregnancy?	\checkmark
Height(feet/inches) Mother Pre-pregnancy Weight (pounds) Mother W	leight at Delivery (pounds)
Cigarette smoking per day before and/or during pregnancy	
Tobacco use during this pregnancy	
Three months before pregnancy	
First three months of pregnancy	
Second three months of pregnancy	
Last Trimester of Pregnancy	
On the days that you smoked cigarettes during any point of your pregnancy, how soon after you woke up did you usually have your first cigarette?	At any time during your pregnancy, did you stop smoking cigarettes for one day or longer because you were trying to quit smoking?
During any point during your pregnancy did you use: E-cigarettes or Vapes (BLU, NJOY, JUUL, SUORIN DROP, PUFF BAR)	Hookah, Shisha, or Water Pipe
Cigarillos (BLACK & MILD, SWISHER SWEETS, PHILLIES BLUNTS) or Little Cigars (CHEYENNE, SENECA)	Chewing Tobacco (GRIZZLY, SKOAL), Snus (CAMEL SNUS), or Nicotine Pouches (ZYN, VELO)
<u>~</u>	~
During your pregnancy, did you stop using any other tobacco products, besides cigarettes, for one day or longer because you were trying to quit tobacco?	

- 2. **Height (feet/inches)** consists of two numeric entry controls. Enter the mother's height in feet the first box and the remaining inches in the second.
- 3. **Mother Pre-pregnancy Weight (pounds)** enter the mother's weight (in pounds) prior to the current pregnancy in this control.
- 4. **Mother Weight at Delivery (pounds)** enter the mother's weight (in pounds) at delivery, but prior to the actual birth, in this control.
- 5. **Tobacco use during this pregnancy** make a selection from this dropdown list. Selecting 'No' will disable the remaining tobacco related controls. If the mother is a non-smoker and 'No' was selected above, the system will autofill the numeric entry controls with zero (0). For non-smoking mothers, it is not necessary to make a selection from the Cigarettes/Pack dropdown list as these controls will be disabled.
- 6. Cigarette Smoking per day before and during pregnancy this tab control is used to capture the mother's use of tobacco (smoking) during the 3 months prior to the current pregnancy and each of the 3-month trimesters of pregnancy.





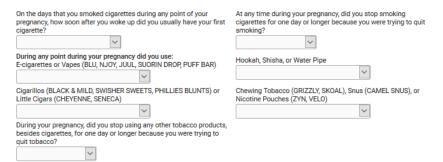
a. If the mother smoked between 1 and 20 cigarettes per day during any of the specified periods, enter the approximate number of cigarettes smoked and select **Cigarettes** from the applicable dropdown lists.



b. A "pack" of cigarettes is generally considered to be 20 cigarettes. If the mother smoked more than 20 cigarettes per day, enter the approximate number of packs smoked per day for each time period and select **Packs** from the dropdown list.



7. Answer a series of questions relating to smoking if the mother used tobacco during this pregnancy.



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





Exercise 7: the Marital Status Page

Skills Learned: How to complete the Marital Status page. The **Marital Status** page is used to gather **Marital Information** and **Paternity Information**.

Note: the Parent Information menu as viewed below will change, depending on the selections made on this page.

 Marital Status: First, make a selection from Mother's Current Marital Status dropdown list.



- Second, make a selection from the Was Mother married at Conception, at Birth or within 300 days prior to Birth? dropdown list.
- 3. Paternity Information: Will acknowledgement of paternity need to be completed? Select No. Note: Even if No was selected for Mother married at birth... above, selecting Yes here and clicking Save will cause the page to refresh and add two additional pages to the Parent Information menu: Father and Father Attributes.







Note: LHDs must select NO for the PA question. Father will have to be added through the amendment process, even if a PA is signed.

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

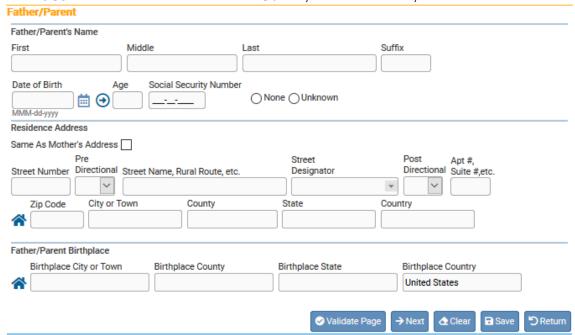




Exercise 8: the Father/Parent Page

Skills Learned: How to complete the **Father** page. The **Father** page is used to capture demographic and statistical data on the newborn's father. This page will appear based on entries made on the **Marital Status** page. See the previous section of this manual for more details.

1. In the **Father's Current Legal Name** tab, enter the father's **First**, **Middle**, and **Last** name. If the father uses a **Suffix**, include it here, as well.



- 2. **Date of Birth** enter the father's date of birth manually or use the Calendar icon () to launch the Calendar Control.
- 3. After entering the **Date of Birth**, click the auto-populate ($^{\bigodot}$) button to complete the **Age** control.
- 4. Enter the father's **Social Security Number**.

None – selecting the radio button for "None" will system-fill the Social Security Number with zeros, indicating that the Father does not have a social security number

Unknown – selecting the radio button for "Unknown" will system-fill the Social Security Number with nines, indicating that the Father's SSN is unknown.





- 5. If the Father's address is the same as the Mother's, select the checkbox for **Same as Mother's Address**.
- 6. Manually complete the Father's **Residence Address**. Please make note of the **Pre-Directional** and **Post-Directional** dropdown lists.
 - a. If the street address has a **Pre-Directional** indicator, i.e. *East* 42nd St. then indicate that by selecting "E" from the **Pre-Directional** dropdown list. Do **NOT** type the **Pre-Directional** indicator in the **Street Name** text box.
 - b. If the street address has a **Post-Directional** indicator, i.e. East 42nd St. *SW*, then indicate that by selecting "SW" from the **Post-Directional** dropdown list. Do **NOT** type the **Post-Directional** indicator in the **Street Name** text box.
- 7. The **Father's Birthplace** control is used to capture the father's **Birthplace City, State** and **Birthplace Country**.

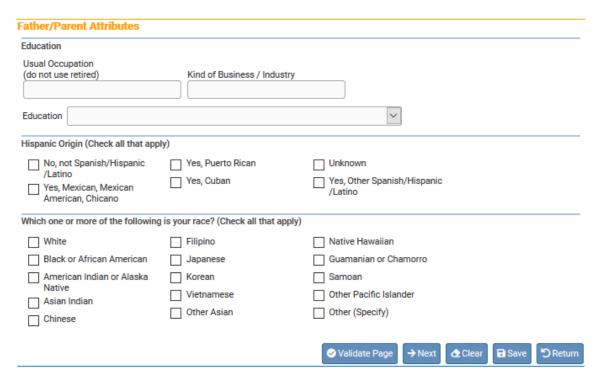




Exercise 9: the Father Attributes Page

Skills Learned: How to complete the **Father Attributes** page. The **Father Attributes** page is used to gather demographic information related to the newborn's father. This information is used in reporting at the State and Federal level and can be instrumental in obtaining funding for various programs.

- Enter Usual Occupation and Kind of Industry of the father.
- 2. **Education**: make a selection from the dropdown list.
- 3. The **Hispanic Origin** tab is used to indicate whether or not the father is of Hispanic descent. Click one or more applicable box or boxes, as needed. Multiple selections are permitted.
- 4. Selecting the 'Yes, Other Hispanic Origin (specify)' checkbox will cause a new text entry control to appear on-screen. Use this control to specify the other Hispanic descent information.



5. The Which one or more of the following is your race? controls also allow for multiple selections. Select all checkboxes that the father considers applicable.





- 6. If the father is of American Indian descent or an Alaskan Native, select the checkbox as shown below. Selecting **American Indian or Alaska Native** (specify tribe) will cause the page to refresh and display two dropdown lists.
- 7. Select the father's specific tribe(s) using one or both of the dropdown lists.
- 8. Note that selecting the Other Asian (specify), Other Pacific Islander (specify), or Other (Specify) checkboxes will cause a two new text entry controls to appear on-screen. At least one of these other entry controls must be completed before registration will be permitted.
- 9. Click the **Validate Page** button to check this page for errors, **Next** to proceed to the **Informant** page, **Clear** to clear all entries, **Save** to save changes without leaving this page, or **Return** to return to the **Main Menu** or **Search Results** page.





Exercise 10: the Informant Page

Skills Learned: How to complete the **Informant** page. **Informant** refers to the person providing information to the hospital or birth center. This could be a parent, a member of the immediate family, or other authorized representative.

Informant							
	ormant to Baby Other Specif	ý					
Informant Name							
First	Middle	Last	Sı	uffix			
			Validate Page	→ Next	△ Clear	□ Save	5 Return

1. **Relationship of Informant to Baby** – make a selection from the dropdown list.

Note: If Mother is selected from 'Relationship of Informant to Baby' dropdown list, then the page will refresh and auto-fill the informant name tab with the mother's information.

- 2. Selecting **Other**, **Specify** from the relationship dropdown list will enable the **Other Specify** text entry control; an entry must be made in the space provided.
- 3. **Informant Name** complete this control by providing at least the informant **First** and **Last** name.
- 4. Click the **Validate Page** button to check this page for errors, **Next** to proceed to the **Place of Birth** page, **Clear** to clear all entries, **Save** to save changes without leaving this page, or **Return** to return to the **Main Menu** or **Search Results** page.





Facility Information Menu Pages

Exercise 11: Place of Birth Page

Skills Learned: How to complete the **Place of Birth** page to indicate where the baby was born.

Note: When home birth options are selected, it will auto populate fields from information entered on the Mother's Residence Address Page. If the child is born elsewhere (e.g., hotel), you must manually enter address information.

1. Make a selection from the **Type of Place of Birth** dropdown list. If the type selected matches the office type assigned to the current user, then the user's default location will be auto-filled in the **Facility Name** and **Address** tabs and the on-screen controls will be disabled.

Note: External data providers associated with a hospital and logged in to process cases from that hospital will not have access to the Type of Place of Birth dropdown list. For those providers, the Type of Place of Birth, Facility Name and Address will be pre-filled and disabled.



- 2. If the actual place of birth does not have a corresponding selection in the dropdown list, select **Other (specify)**. This will enable the **Other Specify** text-box control allowing manual entry of the type of place of birth and the **Address**.
- 3. **Facility name** and **Facility NPI** are disabled when **Other (specify)** is selected. These are typically auto-filled based on the user's facility.
- 4. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Prenatal** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Main Menu**.

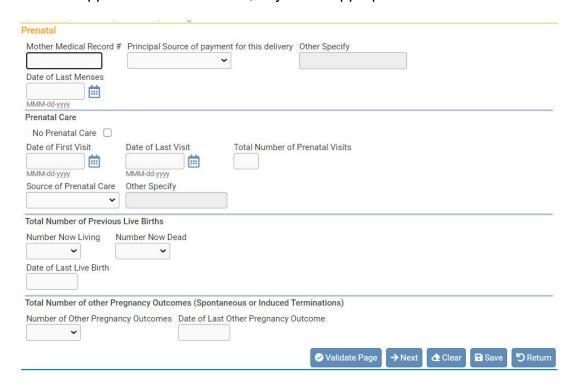




Exercise 12: the Prenatal Page

Skills Learned: Completing the **Prenatal** page. This page captures information relative to the type and frequency of prenatal care administered to the mother.

1. If applicable and available, key in the appropriate on-screen controls.



2. Enter the mother's **Date of Last Menses** using a valid **DRIVE** date format or by clicking on the **Calendar Control**.

The Prenatal Care Tab

- 3. If mother did not receive any prenatal care, select **No Prenatal Care**.
- 4. If the mother did receive prenatal care, complete this tab by entering the **Date of First Visit, Date of Last Visit** and the **Total Number of Prenatal Visits**.
- Select the Source of Prenatal Care from the list.

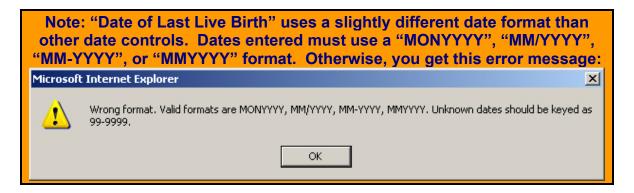
The Previous Live Births Tab

6. On the **Previous Live Birth**s tab, make a selection from the **Number Now Living** dropdown list. If this is the mother's first child, select **None**.





- 7. A selection must also be made from the **Number Now Deceased** dropdown list. Again, if this is the mother's first child, select **None**.
- 8. If **Number Now Living** and/or **Number Now Deceased** is unknown, select **Unknown**. This auto-populates the **Date of Last Live Birth** with **99/9999** and disables the control.
- 9. Complete the **Previous Live Births** tab by entering **Date of Last Live Birth**. If **None** is selected in the previous two controls, this will be disabled.



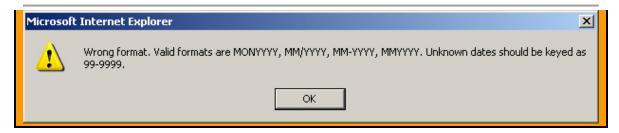
Other Pregnancy Outcomes Tab

- 10. This tab is used to collect information regarding previous pregnancies that did not result in a live birth.
- 11. Make a selection from the **Number of Other Pregnancy Outcomes** dropdown list. If this is the mother's first pregnancy, select **None**.
- 12. If the Number of Other Pregnancy Outcomes is unknown, select Unknown from the dropdown list. Doing so will auto-populate the Date of Other Pregnancy Outcome with 99/9999 and disable the control.
- 13. In **Date of Last Other Pregnancy Outcome** box, enter month and date the last pregnancy terminated. If **None** was selected above, this field is disabled.

Note: like the "Date of Last Live Birth", the "Date of Last Other Pregnancy Outcome" uses a slightly different date format than other date controls. Dates entered here must use a "MONYYYY", "MM/YYYY", "MM-YYYY", or "MMYYYY" format. Otherwise, you will get the following error message:







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





Exercise 13: the Pregnancy Factors Page

Skills Learned: How to complete the **Pregnancy Factors** page. The **Pregnancy Factors** page attempts to gather information related to conditions suffered or experienced by the mother which could result in complications during labor or have health implications for the mother and/or child.

1. This page is comprised of four tabs: Risk Factors for this Pregnancy, Infections Treated, Infections Present and / or Treated During this Pregnancy, and Obstetric Procedures.

Pregnancy Factors			
Risk Factors for this Pregnancy (Ch	eck all that apply)		
None Diabetes - Prepregnancy Diabetes - Gestational Hypertension - Pre-pregnancy (Chronic) Hypertension - Gestational	Infertility Treatment - Fertility	Mother Had A Previous Cesarean Delivery Antitretroviral(s) administered during pregnancy or at delivery for treatment of HIV/AIDS Group B Strep	,
(PiH, preeclampsia)	Enhancing Drugs Pregnancy Resulted From Infertility Treatment - Assisted Reproductive Technology	Unknown	Make a selection from each of the Infections Tested, when they were tested or why they were not tested.
Infections Tested			
Was a Standard License Diagnostic performed for the Mother?	test for filv	If Yes, when was test performed?	
If Yes, Date		if No, Reason	<u>~</u>
Was a Serological test for Syphilis p Mother? If Yes, Date Mother Tested for Group B Strep?	performed for the MMM-dd-yyyy	If Yes, when was test performed?	
Infections Present and / or Treated	During this Pregnancy (Check all the	at apply)	
None Herpes Simp	lex Virus (HSV) Syphilis (Chlamydia Hepatitis B	Hepatitis C Unknown
Obstetric Procedures			
Amniocentesis None Cervical cerclage Electronic Fetal Monitoring	☐ Induction of Labor ☐ Tocolysis ☐ External Cephalic Version - Successful ☐ Stimulation of Labor	External Cephalic Version-Failed Ultrasound Unknown Other (specify)	☆ Clear

- 2. Each tab allows for multiple entries, meaning that the user can select one or more conditions for each tab control on the page, however, at least one selection must be made for each set of conditions.
- 3. Click the Validate Page button to check this page for errors, the Next button to proceed to the Labor page, the Clear button to clear all entries, the Save button to save changes without leaving this page, or the Return button to return to the Main Menu.





Exercise 14: the Labor Page

Skills Learned: How to complete the **Labor** page. The **Labor** page is used to gather information related to conditions suffered or experienced during labor which may have health implications for the mother and/or child.

1. This page is comprised of two tab controls: **Onset of Labor** and **Characteristics of Labor and Delivery**. Both of the tabs allow for multiple entries, however, at least one selection must be made for each set of conditions.

Labor						
Onset of Labor (Check all that apply)						
None	Prolonged labor (>=20 hours)					
Premature Rupture of the Membranes (Prolonged, >=12 hours)	Unknown					
Precipitous labor (<3 hours)						
Characteristics of Labor and Delivery (Check all tha	t apply)					
None						
Induction of labor						
Augmentation of labor						
Non-vertex presentation	Non-vertex presentation					
Steroids (glucocorticoids) for fetal lung maturation received by the mother prior to delivery						
Antibiotics received by the mother during labor						
Clinical chorioamnionitis diagnosed during labor or maternal temperature >=38C (100.4 degrees F)						
Moderate/heavy meconium staining of the amniotic fluid						
Fetal intolerance of labor						
Epidural or spinal anesthesia during labor						
Abruptio placenta						
		A OI	D 0	No.		
	✓ Validate Page → Next	◆ Clear	□ Save	'D Return		

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

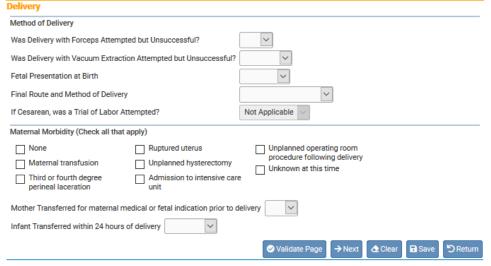


Exercise 15: the Delivery Page

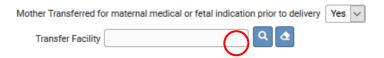
Skills Learned: How to complete the **Delivery** page. The **Delivery** page is used to record the conditions and procedures present in and used during the birth process. Complete each section by checking the appropriate boxes. Do not leave a section blank.

Method of Delivery

- 1. The **Method of Delivery** tab is used to describe how the child was born. First, make a selection from the **Was Delivery with Forceps Attempted but Unsuccessful?** dropdown list.
- 2. Next, make a selection from the **Was Delivery with Vacuum Extraction Attempted but Unsuccessful?** dropdown list.
- 3. Continue this process by making valid selections from the **Fetal Presentation at Birth** and **Final Route and Method of Delivery** dropdown lists.
- 4. **If Cesarean, was a Trial of Labor Attempted?** will only be active and selectable if **Cesarean** was selected from the **Final Route and Method of Delivery** control above.



- 5. The **Maternal Morbidity** tab captures any serious complications experienced by the mother associated with labor and delivery. Multiple entries are allowed. Select **None** if none of the conditions were experienced by the mother during delivery.
- 6. Next, make a selection from the **Mother Transferred for maternal medical or fetal indication prior to delivery** dropdown list. Notice that selecting **Yes** will cause the page to refresh and a new set of controls will appear:

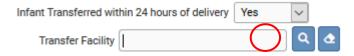




- 7. Selecting the Search icon () will launch the Place Name lookup tool, shown below. Key in the name of the transfer facility and click the Search button:
- 8. If the search was successful, select the **Transfer Facility** by clicking on the **select** link:
- 9. Again, the page will refresh and display the **Transfer Facility** on the **Delivery** page:
- 10. If this facility was selected in error, select the Eraser icon () to remove the facility name from the page.

Note: Transfer Facility can be keyed in manually if the facility in question cannot be found in the DRIVETM database.

11. Lastly, complete the page by making a selection from the **Infant Transferred within 24 hours of delivery** dropdown list. Notice that selecting **Yes** will cause the page to refresh and a new set of controls will appear:



- 12. Selecting the Search icon () will launch the Place Name lookup tool, shown below. Key in the name of the transfer facility and click the Search button:
- 13. If the search was successful, select the **Transfer Facility** by clicking on the **select** link:
- 14. Again, the page will refresh and display the **Transfer Facility** on the **Delivery** page:
- 15. If this facility was selected in error, select the Eraser icon () to remove the facility name from the page.

Note: Transfer Facility can be keyed in manually if the facility in question cannot be found in the DRIVETM database.

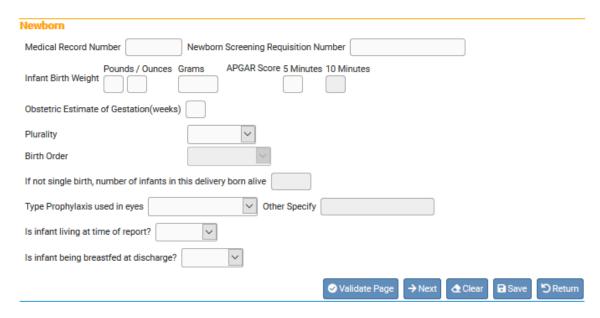
16. With the **Delivery** page now complete, click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Newborn** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Main Menu**.



Exercise 16: the Newborn Page

Skills Learned: How to complete the **Newborn** page. The **Newborn** page is used to capture data relevant to the child at the time of birth.

1. If a medical record number is available, key it into **Medical Record Number** field.



- 2. If applicable, enter the **Newborn Screening Requisition Number**.
- 3. **Infant Birth Weight** should be entered in either **Pounds / Ounces** or **Grams**. Both weight measurements cannot be used simultaneously. If **Pounds / Ounces** is used, enter the weight in pounds in the first entry box and remainder ounces in the second entry box.
- 4. **APGAR Score** Enter the child's APGAR score as it was recorded at 5 and 10 minute intervals. Notice that, in the example below, the child's **5 Minutes** APGAR score was 6. A **5 Minutes** APGAR score of 6 or higher precludes the necessity to enter a **10 Minutes** score, therefore, the **10 Minutes** field is disabled.
- 5. Enter the term of the mother's pregnancy in weeks in the **Obstetric Estimate of Gestation (weeks)** field.
- 6. Make a valid selection from the **Plurality** dropdown list. If only one child was delivered, select **Single**. If more than one child was delivered even if one or more children were stillborn or died shortly after birth select the appropriate plurality from the list twin, triplet, etc.
- 7. **Birth Order** will be disabled if **Single** was selected from the **Plurality** list. Otherwise, if more than one child was delivered even if one or more children were stillborn or died shortly after birth select the current child's birth order from this dropdown list.



Work Queues

- 8. If **Single** was selected from the **Plurality** dropdown list, then the **If not single birth**, **number of infants in this delivery born alive** control will be disabled. Otherwise, if a different plurality was selected, enter the number of live children that were delivered in this control.
- 9. Select the **Prophylaxis used in eyes** from the dropdown list
- 10. Select 'Yes' from the Is infant living at time of report? dropdown list.
- 11. Select 'Yes' from the Is infant being breastfed at discharge? dropdown list.
- 12. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Newborn Factors** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Main Menu**.



Exercise 17: the Newborn Factors Page

Skills Learned: How to complete the **Newborn Factors** page. This page gathers information related to abnormal conditions or congenital anomalies experienced at birth.

1. This page is comprised of two tabs: **Abnormal Conditions of the Newborn**, and **Congenital Anomalies**.

Abnormal Conditions of the Newborn is used to gather information related to disorders or significant morbidity experienced by the newborn infant.

Congenital Anomalies is used to capture information related to malformations of the newborn diagnosed prenatally or after delivery.

Newborn Factors	
Abnormal Conditions of the Newborn (Check all that a	apply)
None Assisted ventilation required immediately after delivery Assisted ventilation required for more than 6 hours NICU admission Newborn given surfactant replacement therapy	Antibiotics received by the newborn for suspected neonatal sepsis Seizure or serious neurologic dysfunction Significant birth injury Neonatal Abstinence Syndrome (NAS)
Congenital Anomalies (Check all that apply)	
None of the anomalies listed	Hypospadias
Anencephaly	Microcephaly
Meningomyelocele/spina bifida	Encephalocele
Cyanotic congenital heart disease	Holoprosencephaly
Congenital diaphragmatic hernia	Anophthalmia/Microphthalmia
Omphalocele	Anotia/Microtia
Gastroschisis	Choanal Atresia
Limb reduction defect (excluding congenital amputation and dwarfing syndromes) Cleft lip with or without cleft palate Cleft palate alone Down Syndrome Karyotype Confirmed Down Syndrome Karyotype Pending	☐ Trisomy 13 and 18 ☐ Bladder Exstrophy ☐ Cloacal Exstrophy ☐ Congenital Posterior Urethral Valves ☐ Renal Agenesis/Hypoplasia
Down Syndrome karyotype renaing	Esophageal Atresia/Tracheoesophageal Fistula
Suspected other chromosomal disorder karyotype confirmed Suspected other chromosomal disorder karyotype pending Suspected other chromosomal disorder karyotype unknown	☐ Intestinal Atresia/Stenosis ☐ Unknown
	◇ Validate Page → Next ★ Clear Save S Return

- 2. Each tab allows for multiple entries. Select **None**, if none of the conditions were experienced by the child during delivery.
- 3. Click the Validate Page button to check this page for errors, the Next button to proceed to the Attendant/Certifier page, the Clear button to clear all entries, the Save button to save changes without leaving this page, or the Return button to return to the Main Menu.

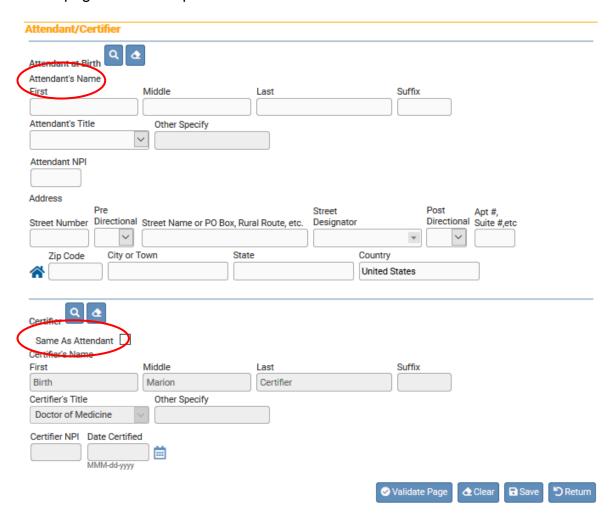


Exercise 18: the Attendant/Certifier Page

Skills Learned: How to complete the **Attendant/Certifier** page. The **Attendant/Certifier** page is used to capture information relevant to the person or persons attending and/or certifying the birth.

The Attendant at Birth is defined as the individual physically present at the delivery who is responsible for the delivery.

1. This page is broken up into two main tabs: Attendant at Birth and Certifier.



- 2. The Attendant at Birth tab includes two clickable icons that can help complete this page quickly and efficiently: the Search icon () and the Eraser icon ().
- 3. Selecting the Search icon () will launch the Name lookup tool, shown below. Key in at least the Last Name of the attendant/certifier and click the Search button:



Work Queues

- 4. If the search was successful, select the desired attendant by clicking on the **select** link:
- 5. Again, the page will refresh and auto-fill the **Attendant at Birth** tab with information specific to the selected attendant:
- 7. The Certifier tab also includes the Search icon () and the Eraser icon (), meaning that the same set of steps detailed above can be used to auto-fill this control as well.
- 8. However, if the certifier and the attendant are the same person, then locate and click the **Same As Attendant** checkbox shown below. This will auto-fill the **Certifier** tab using the attendant information from the previous control.
- 9. **Certifier NPI** will auto-fill based on data stored in the **DRIVE** database.
- 10. **Date Certified** will be auto-filled once the birth record has been certified, unless it is a home birth, which required the **Date Certified** to be manually entered.
- 11. Birth registration data entry is now complete. Click the **Validate Page** button to check this page for errors. If no errors are found, then the record is registered.

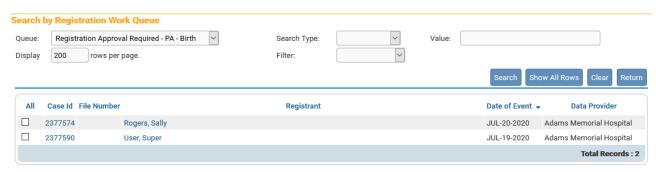


Exercise 19: Registration Approval Required - PA

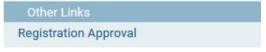
Skills Learned: How to approve a birth registration where a Paternity Affidavit exists.

The Registration Approval Required – PA (Accept for Filing) feature allows the LHD to approve a record that has been certified but a Paternity Affidavit exists. This feature is only available for records owned by the facility based on the Place of Birth. The user will not display any records not associated with the current facility.

 To determine what records are ready for approval, Select Queues > Registration Work Queue > Registration Approval Required - PA - Birth.



- 2. Select the **Case Id** to display the record of choice.
- 3. Find the **Attachments** link to review the **PA**.
- 4. Under the Other Links Menu the "Registration Approval" page link displays.



5. Select the "Registration Approval" link to enter the Approve Registration page. Select to Approve or Reject the Legal Information, the Medical Information and the PA. Enter a Reject reason if Reject is selected. Select the Save button to save the changes.



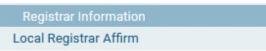


Exercise 20: Local Registrar Affirmation Required (Local Registrar Affirm)

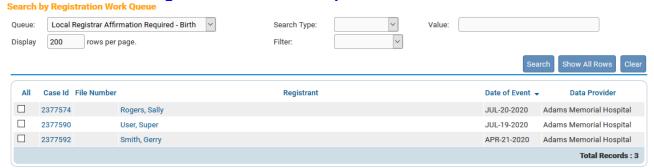
Skills Learned: In this exercise you will learn how to Affirm a Birth Registration, once the registration has been approved (see exercise 20) in the **DRIVE** system.

The Local Affirmation Required (Local Registrar Affirm) feature allows the LHD to affirm a record where the Local Registration has been Accepted for both Personal and Medical. This process will register the record.

 Once the Registration Approval process (Exercise 20) has been completed and the Legal, Medical and PA sections have been approved, the Local Registrar Affirm page link will be displayed under the Registrar Information Menu. Select the Local Registrar Affirm and check the box at the affirmation statement. Then select Affirm.



2. To determine what records are ready for affirmation, Select Queues > Registration Work Queue > Local Registrar Affirmation Required – Birth.



Select the Case Id for the record of choice. Select the Local Registrar Affirm page link.
 Select the affirmation checkbox and the Affirm button to complete the registration.

Affirmations Affirm the following:

☐ I affirm I am authorized to approve this record for filing.



The record status changes from unregistered to registered.

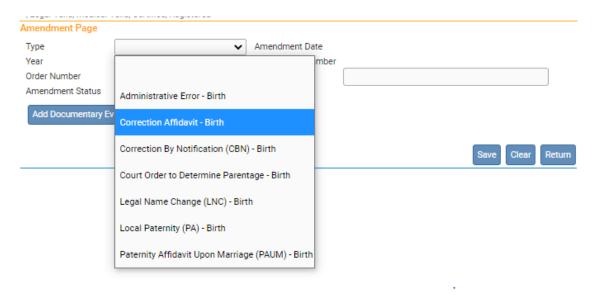


Other Links

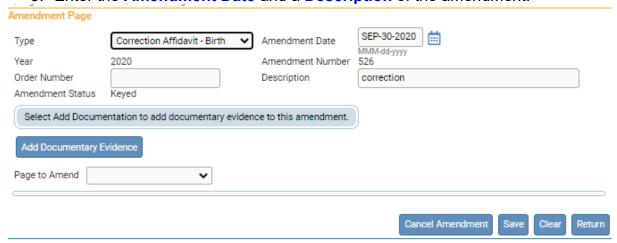
Exercise 1: Creating Amendments

Skills Learned: In this exercise you will learn how to make Amendments requests.

- Select Amendment link.
- 2. Go to **Amendment** page and select amendment **Type** from the dropdown menu.



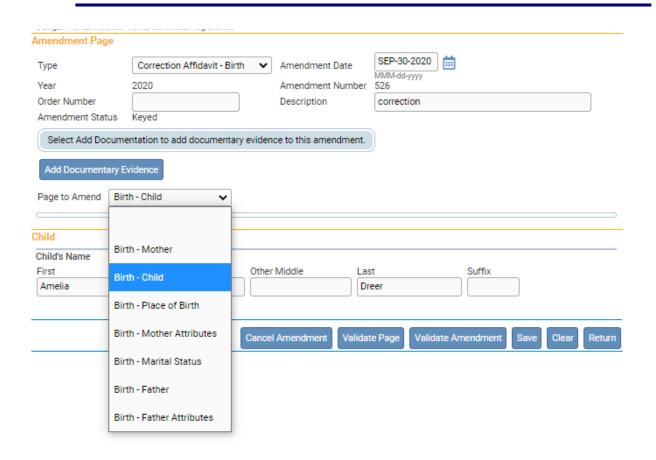
3. Enter the Amendment Date and a Description of the amendment.



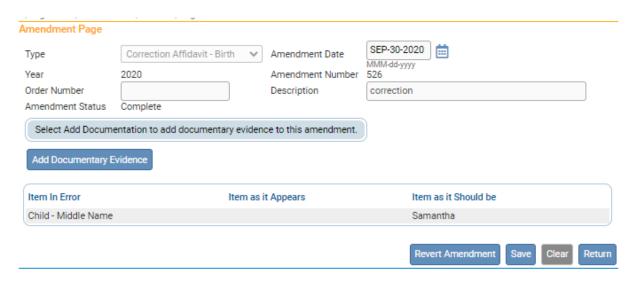
4. Find the Page to Amend button and select the correct page from the dropdown menu. The page will appear and you can make the correction. Click Save to save the amendment or Clear to cancel.



Work Queues



5. You will now be able to see the item amended.



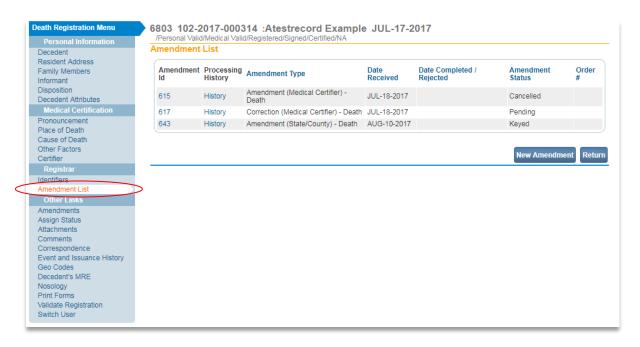


Exercise 2: Amendment List

Skills Learned: How to use the **Amendment List** to view a list of all the amendments that have been requested and processed for a specific registration.

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

1. From the **Death Registration Menu**, select **Registrar > Amendment List**:



2. Notice that the **Amendment Id** and **Processing History** columns contain links to specific amendments.

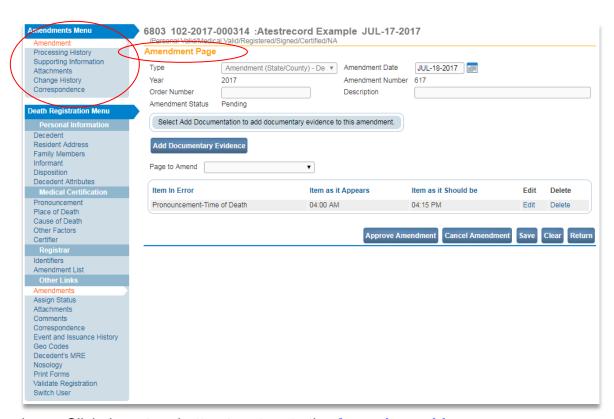


From the **Amendment List** page select one of the **Amendment Id** links.

3. The **Amendment Page** will launch and the **Amendments Menu** is now displayed above the Death Registration Menu display the associated amendment.



Work Queues



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

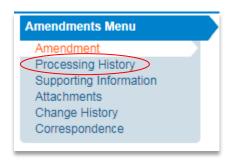


Exercise 3: Approving/Rejecting Birth Amendments

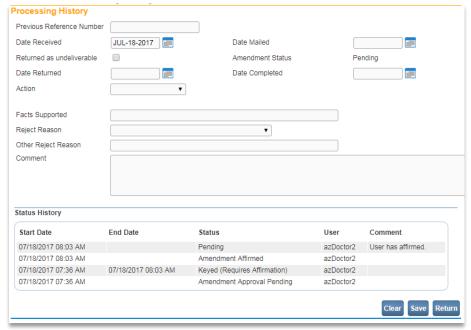
Skills Learned: In this exercise you will learn how to approve or reject **Amendment** requests.

Step 1 – Amendment Processing History:

1. From the **Amendments Menu**, select **Processing History**. The **Processing History** page is setup to support the processing of amendment requests.



2. The **Processing History** page will be displayed. **Date Received** is system filled with the date the amendment was submitted.



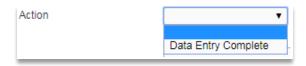
3. Many times requests for amendments are made that cannot be granted. In these cases, a rejection notice is mailed to the individual(s) requesting the change. If the notice of rejection is returned by the USPS as undeliverable, then a checkmark should be placed in the **Returned As Undeliverable** checkbox.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



- 4. **Amendment Status** is a system filled, non-updateable field. When an amendment request is first entered, the status defaults to **Keyed**. As the amendment is processed, the status will change accordingly.
- 5. **Date Completed** will be auto-filled with the date the amendment was either approved or rejected.
- 6. While it is not necessary to enter a **Comment** as part of the amendment process, it is recommended. Detailed comments can provide much needed information to the next user working on the amendment and can help eliminate needless rejections or invalid approvals. To add a comment, simply click anywhere inside the **Comment** text box and being keying in your comment.
- 7. In this exercise, we will select from the **Action** dropdown list to process the amendment. Available actions include **Approve**, **Reject**, **Data Entry Complete**, etc. However, not all actions are available at all times as what is available depends on which **Amendment Status** is currently applied.
- 8. In this exercise we are processing a Amendment submitted by a Certifier. Therefore we can only select to **Approve** or **Reject** the Amendment.



If we were processing an amendment that had been created directly by a State or County user, the first and only **Action** to be selected is **Data Entry Complete**.



9. Select to **Approve** the amendment and then select the **Save** button. The page will refresh. Notice that the status of the amendment has now changed from **Pending** to **Complete**.





Once an amendment has reached a **Complete** status, the on-screen controls are disabled.

- 10. The **Status History** table provides an ongoing listing of all amendments and their respective statuses. No entry into this field is needed (or possible.) The table automatically updates each time an amendment status changes.
- 11. If the amendment status is not complete, click the **Clear** button to clear unsaved changes to the amendment, the **Save** button to save changes and update the **Status History** table or the **Return** button to close the **Amendments Menu** and return to the **Death Registration Menu**.

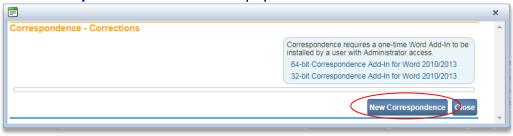
Step 2 – Amendment Correspondence:

Occasionally, it is necessary for the State or County to correspond with its vital records partners or with vital records applicants regarding Amendments. For example, most jurisdictions have Query Letters that they regularly send to requesting additional information that is needed in order to complete and approve an Amendment.

From the Amendments Menu, select the Correspondence link.



The Correspondence window will pop on-screen:



2. Select the **New Correspondence** button. A listing of existing amendment correspondence templates will be displayed.





3. Select the **Select** link next to the correspondence you wish to send. The **Correspondence** pop-up window will refresh and display the selected template.



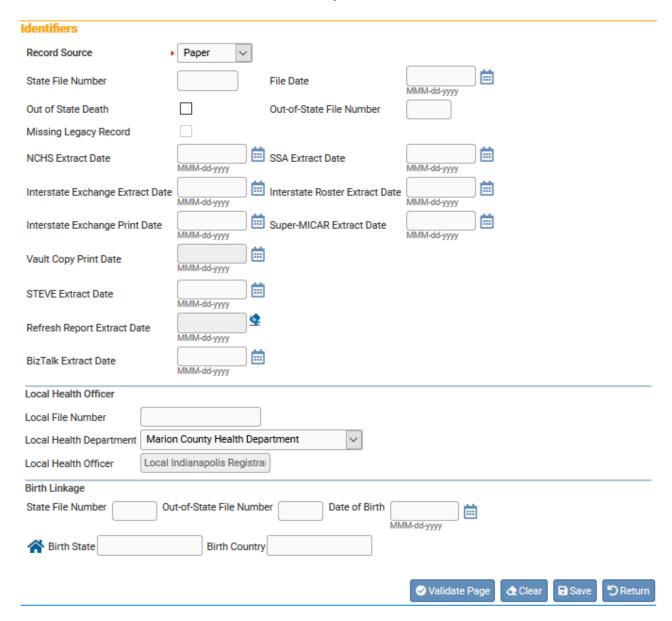
4. Select the **Download** link. The correspondence template will be downloaded and displayed within your computer's installed Microsoft Word program. At this point the document can be edited like any other Word document. Once the correspondence document is completed and saved in Word, the updated document will be available to download and review. Thus allowing for the tracking of all correspondences sent in regards to the **Amendment**.



Exercise 4: Identifiers Page

Skills Learned: How to access and edit fields on the **Identifiers** page.

The **Identifiers** page is used to store and display registration related information that is only viewable and/or editable at the state or county office level.



- 1. Most of the data elements on the **Identifiers** page will be auto-filled as the record is processed and registered.
- 2. State File Number and File Date are assigned upon certification.



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- 3. Out of State File Number will be completed if the registration is included in the Interstate Exchange File.
- 4. **Record Source** defaults to **Electronic**. However, if the original source of this registration is a paper document then **Paper** will be displayed instead.
- 5. **Extract Dates** will all be auto-populated whenever these extracts are run or the reports printed.
- 6. The **Local Health Officer** contains items associated to the Local Health Officer assigned to the case.
- 7. The data elements on the **Birth Linkage** tab control will also be auto-filled upon any applicable Birth Death match and linkage. However, these controls can also be completed manually.



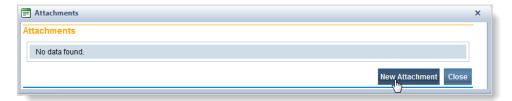
Exercise 5: Attachments

Skills Learned: How to attach supporting documentation to a registration.

Step 1 – Attach Electronic Documents:



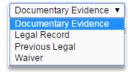
- 1. From the Other Links menu, select Attachments.
- The Attachments popup appears. Select the New Attachment button.



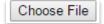
3. The popup expands to display the New Attachment section.



4. Select an **Attachment Type** from the Dropdown.



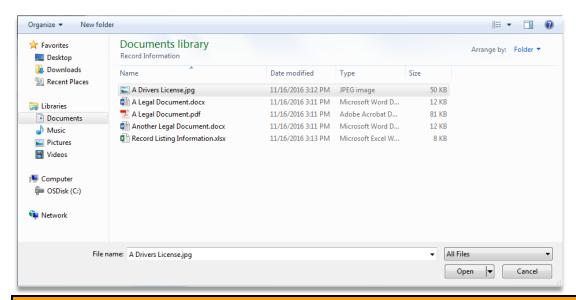
5. Select the **Choose File** button to open a Windows dialogue box.



6. Select the document to be attached and select the *Open* button.

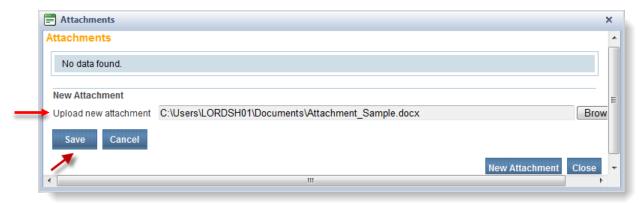


Work Queues

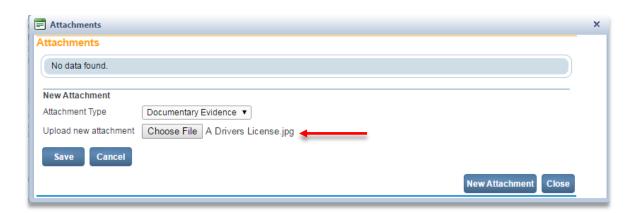


Any file type may be uploaded to the system, however not all DRIVE users will have access to the same programs on their computer. Therefore it is recommended that only common formats such as MS Office, Adobe PDF, and standard Image file types (.jpg, .png, .tiff, etc.) be attached.

The selected file name and path appear in the *Upload new attachment* field. Select **Save**.



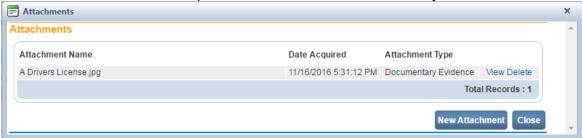
The **Attachments** popup displays the file selected.



7. Select **Save** to attach the selected document.

Select Cancel or Close to close out from the selection options without attaching the document.

The attach document is now uploaded to the Death record and may be Viewed or Deleted.



Step 2 - View Attachments:

- 1. Select the **Attachments** link.
- 2. The **Attachments** pop-up will display a list of all attached files. Select **View** next to the attachment you wish to view.



3. The attachment will be download and, depending on the browser, automatically opened to view.

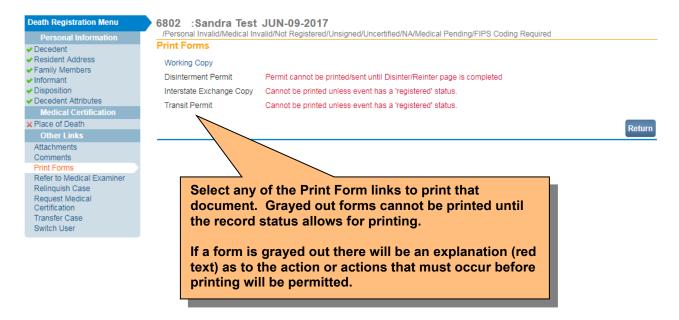


Exercise 6: Print Forms

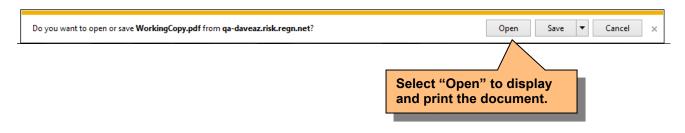
Skills Learned: In this exercise you will learn how to send copies of a print document to an installed printer. **Note:** The examples shown are not necessarily forms you have access to, as this is simply an exercise to show you how to access and print forms.

Note: The ability to print Work Copies is based on user security privileges. Typically, Physicians, Medical Personnel, Funeral Directors, and Coroners will be printing Work Copies.

- Under the Other Links Menu select Print Forms.
- Locate the Working Copy link.



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





Exercise 7: Comments

Skills Learned: How to add comments to a registration.

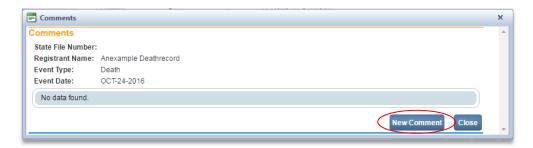
During the process of entering and registering a death record it is sometimes necessary to store comments about the case. These can serve as reminders to others who work on it.

Step 1 - Add Comment:

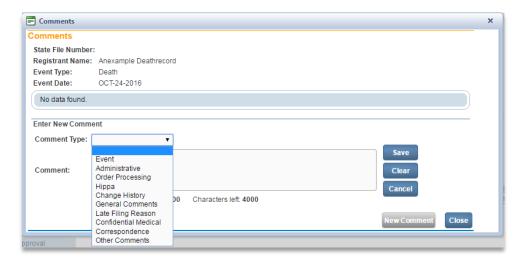
1. Select Other Links > Comments.



The **Comments** popup page appears, displaying the *State File Number* (if registered), *Registrant Name*, *Event Type*, and *Event Date*. This default information is displayed for reference.



2. To add a new comment, select **New Comment**. The page displays **Enter a New Comment**.

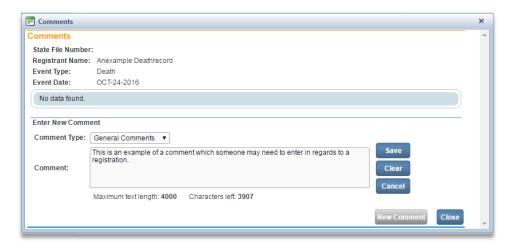


3. Select a **Comment Type** from the dropdown.

Comment types available vary based on user assigned security privileges.



4. Enter the comment in the **Comment** field. Comments are limited to 4000 characters. A running total of the characters remaining is displayed at the bottom of the window.



5. Once a comment has been entered, select the **Save** button.

Select Clear to clear the comment text, or Cancel to close the comment window.

Selecting Save adds the comment. A portion of the comment displays in the Comments window.



Select the **Close** button on the comments popup window. A checkmark appears next to the **Comments** in **Other Links** to indicate that a comment has been added to the registration.



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



Exercise 8: Correspondence

Skills Learned: How to send a correspondence to an agency, partner or customer.

Occasionally, it is necessary for the State to correspond with its partners or with applicants.

Step 1 – Create Correspondence:

1. From the Registration Menu, select Other Links> Comments.



The Correspondence - Registration popup opens.



2. Select the **New Correspondence** button.

The **New Correspondence-Registration** popup displays with a list of the correspondence templates available. .

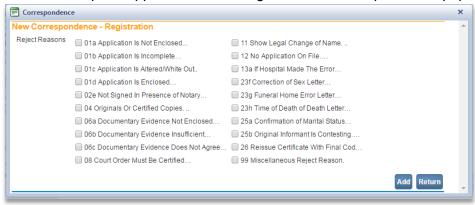


3. Select the correspondence template.





The selected template appears in the data grid on the Correspondence popup.



- 4. From the column labeled 'File' in the Correspondence data grid, select the **Download** link to download an available correspondence template. Once downloaded, and depending on browser, the selected template may open automatically or the user may be prompted to select to open it.
- 5. The MS Word template will then be displayed. The fields specified by the template wll be auto-populated with record-specific data from the specific regsitrtaion. Since it is a MS Word document, depending on the security level set in regards to the template itself, more information can be added, or current information can be edited. The template can then be saved to the registration. Once the correspondence is complete, it can be printed and mailed.
- Once correspondence has been added to a record, select the Close button on the correspondence popup. A checkmark appears next to the Correspondence link in the Other Links sub-menu.





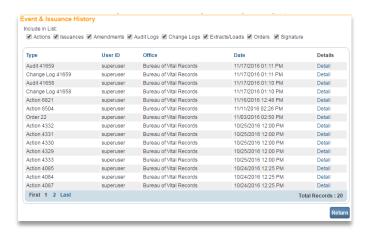
Exercise 9: Event and Issuance History

Skills Learned: Using the **Event and Issuance History** functionality to track changes and issuances related to a registration.

From the Registration Menu, select Other Links > Event and Issuance History.



2. The **Event and Issuance History** page displays a listing of activity associated with the selected death or fetal death record.

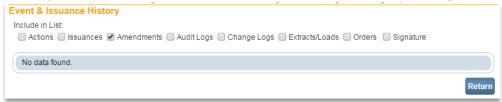


3. Within the **Event and Issuance History** page, the activities auditied and logged are filtered into 7 categories: *Actions, Issuances, Amendments, Audit Logs, Change Logs, Extracts/Loads*, and *Orders*



The default setting selects all *Include in List* checkboxes so that all logged activities are displayed. Results can then be filtered based on user preference by de-selecting checkboxes. If a user does not have the security rights for a certain event or issuance history type, the associated checkbox is hidden and that type is filtered from the list.

If the registration does not include any of the selected events or actions, the *Event & Issuance History* page will display "No data found." For example if no amendments have been made to the registration and only the *Amendments Include in List* item is selected the following will display:

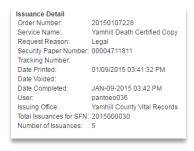




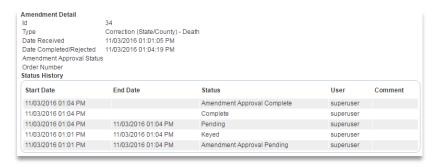
Actions: The *Action Detail* displays action taken on the record, the user who performed the action, the office the user was logged into, and the date and time the action took place.



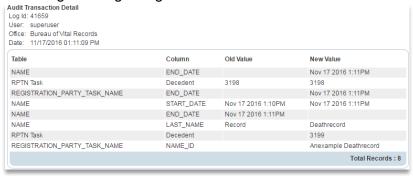
Issuances: *Issuance Detail* provides information related to the issuance of certified copies or other services. This information includes the order number, service, security paper number, user, issuing office, date and time printed, etc.



Amendments: Amendments Detail displays the information in regards to amendments made to the registration. Detail such as when the amendment was made, the status of the amendment, and the date it was completed or rejected.



Audit Logs: Audit Transaction Detail displays information regarding the DRIVE™ database table that was affected by actions taken on the registration. The *Old Value* and *New Value* are displayed in the data grid listing in regards to the Table and Column affected in the database.





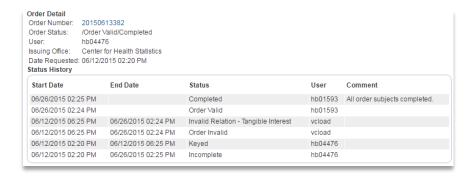
Change Log: Change Log Detail displays changes made to field values within the registration. The user who made the change, date and time the change was made are displayed along with a grid showing the item changed, and old and new values.



Extracts and Loads: *Extracts/Loads* displays any extracts and loads in which the registration was included.



Orders: Order Detail displays the information on orders processed in regards to the record. The order number, current order status, the user that last updated the order, the issuing office of the order, the date and time that the order was requested along with the order status history are displayed.





Exercise 10: Validate Registration

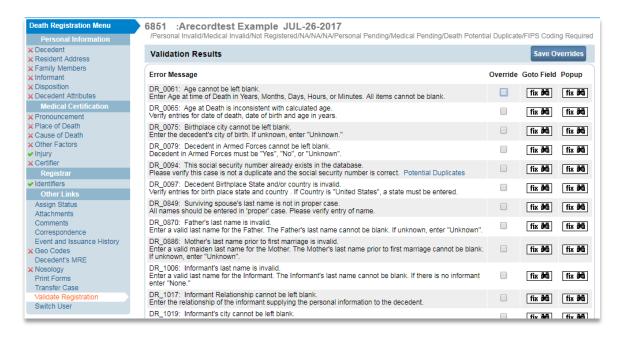
Skills Learned: How to validate a registration prior to certification.

The **Validate Registration** page serves as a final review of the death registration process and is intended to show the user any outstanding issues such as missing or invalid data.



1. From the **Death Registration Menu**, select **Other Links -> Validate Registration**. **DRIVE** will review every page of information that has been submitted.

2. When the validation is complete, the page will refresh and display all errors that were found.

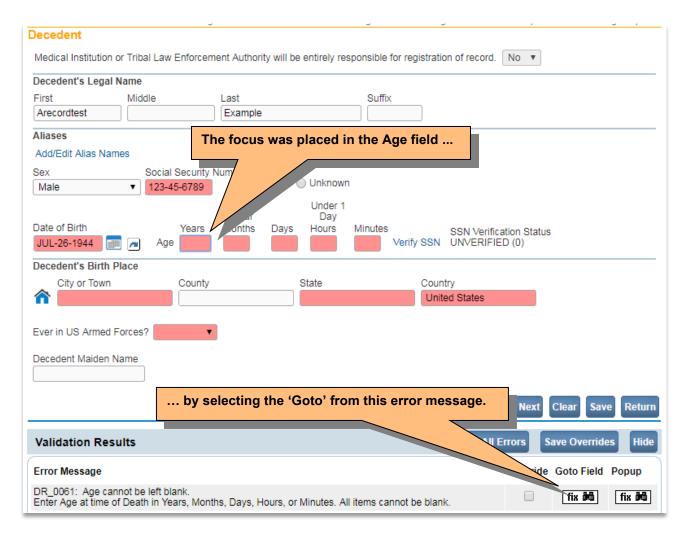


- 3. The **Validation Results** page enables you to find and correct the listed errors. There are two different ways to locate and correct errors:
- 4. Notice in the figure below the two columns on the far right of the error grid entitled **Goto Field** and **Popup**. Inside of each of these cells is a **fix** icon (**fix**). The following pages examine the differences between using the **Goto Field** and the **Popup** links for error correction.



Error Correction Using the Goto Field Button

- 1. To correct an error, click on the fix button in the Goto Field column of the Validation Results page.
- 2. Select **Goto** to open the page containing the error. DRIVETM will automatically place the cursor or "focus" in the field that needs to be corrected.



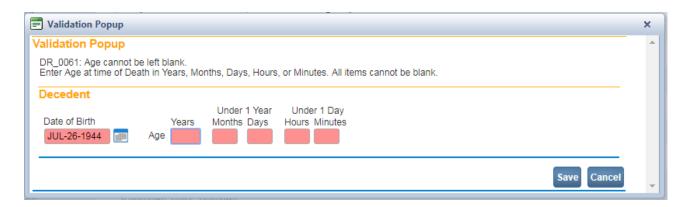
'Focus' determines which on-screen element is the target of action. If a text box 'has the focus' then anything typed on the keyboard appears in the text box. If a dropdown list 'has the focus' the down-arrow will open the list and the up-arrow will close the list.

Error Correction Using the Popup Button

1. To use this method of error correction, click the fix button in the Popup column.



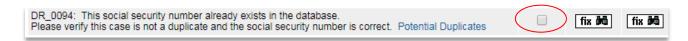
Work Queues



- 2. A new window pop on-screen containing each of the entries that caused the error. This functionality is useful when an error is generated 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.
- 3. Correct the error and click the **Save** button to submit your changes.

Overridable Errors

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



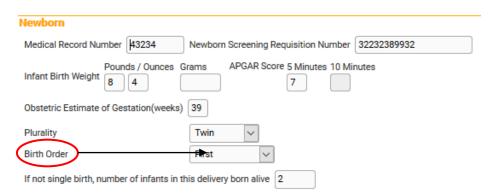
2. Place a checkmark () in the **Override** box next to the error to be overridden and click the **Save Overrides** button. This allows you to process a death record even if some errors are present.



Exercise 11: Link Plural Deliveries

Skills Learned: How to link multiple births allowing the sharing of common information.

1. The first step in linking plural deliveries is to complete the entry of at least one related birth record. On the **Newborn** page of the first related birth registration select a **Plurality** greater than single. In the example shown below **Twin** was selected.



 Selecting plurality greater than single and selecting Save or Validate Page will cause the Birth Registration Menu to refresh and a new link will appear in the Other Links sub-menu: Link Plural Delivery.



Linking a New Record

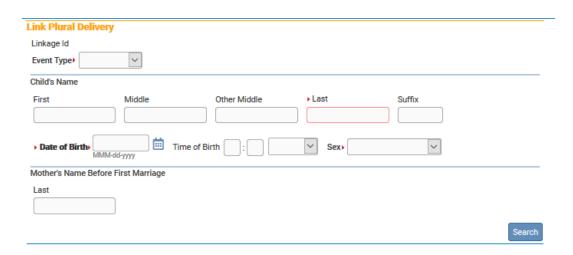
- Notice that there are two sections to the Link Plural Delivery page: the Linked Case List grid control and the Current Case summary window. In the example below, only the current record shows in the Linked Case List control.
- 2. The **Current Case** page also displays only the information associated with the current registration. Click the **Link New Case** button at the bottom of the page...



...to refresh the page and display the Link Plural Delivery search page.



Work Queues



Select Birth from the Event Type dropdown list.



4. Enter the baby's **Last** name, **Date of Birth**, and **Gender**. Click the **Search** button to proceed.



3. If no matching records are found, click the **Start New Case** button:



4. A new case will be created and automatically linked to the **Current Case**.

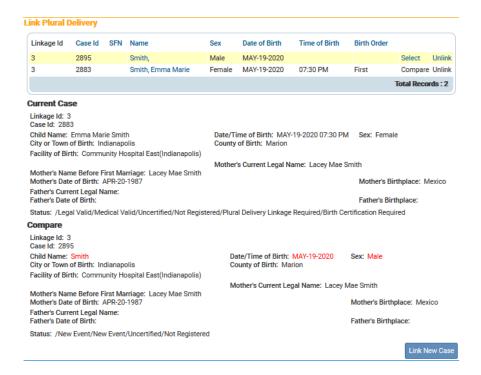




5. The Linked Case List displays an Unlink option. This indicates the two records shown have been linked. Selecting Unlink will break the link between the two records.



6. Click the **Compare Link** in the **Linked Case List** to open a new window on the **Link Plural Delivery** page previewing the information related to the new registration. This provides an opportunity to compare the two records as they currently exist in the system.





- 7. These records are now linked. If more than two children were born in the same delivery, additional cases can be linked by clicking the **Link New Case** button again and repeating the steps above.
- 8. Even though much of the registration data was copied from the original record to the linked record, the new registration is still incomplete.
- 9. Click on the registrant link in the **Name** column to open the new record and complete the registration.



Linking to an Existing Record

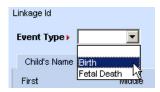
DRIVE also provides the ability to link two or more cases of multiple births that may have been keyed separately from one another.

- 1. First, select Main Menu -> Life Events -> Birth -> Locate Case to locate one of the previously entered multiple births.
- 2. Open the record by clicking on the **Child's Name** link:
- 3. With the record open, locate and select Other Links -> Link Plural Delivery
- 4. The Link Plural Delivery page will display. The page contains a Linked Case List across the top, the Current Case summary window in the middle and a Link New Case button in the bottom right-hand corner.
- 5. Click the **Link New Case** button to proceed.
- 6. Selecting Link New Case will launch the Link Plural Delivery search page.





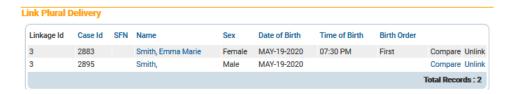
7. From the new **Link Plural Delivery** page, enter the same information that would ordinarily be entered when starting a new birth record. The first step is to conduct a search for any matching records already in the system. However, with plural delivery searches, a selection must first be made from the **Event Type** dropdown list.



- 8. The **Fetal Death** option would only be selected in the event of a multiple birth in which at least one child was stillborn. Otherwise, select **Birth**.
- 9. After making a selection from the **Event Type** dropdown list, enter the baby's **Last** name, **Date of Birth**, and **Gender**.
- 10. Click the Search button to display the Link Plural Delivery Search Results page:



- 11. Any potentially matching records will be displayed in the Linked Case List along with the current case. Select the Link option next to the new case to link the two records.
- 12. The page will refresh and disable the links associated with the current record. Also, the **Link** indicators are changed to **Unlink**, allowing the user to undo the linking process.



- 13. Select **Compare** to display a summary of both linked records.
- 14. If more than two children were born in the same delivery, additional cases can be linked by clicking the **Link New Case** button again and repeating the steps above.



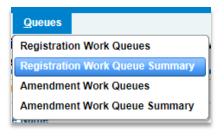
Work Queues

Skills Learned: In this exercise you will learn how to navigate through the various work queues in the system. For this exercise we will be working from the **Main Menu**, not the **Death Registration Menu**. The **Main Menu** is continuously displayed across the top of the DRIVE screen when logged in.



From the **Main Menu**, select **Queues**. **Queues** contain registrations, orders, or amendments which have a work queue status assigned. Queues are used to group death cases together based on the amount of work that has been done with them and the amount of work that still needs to be done. This is done primarily through the assignment of a work queue status when a validation rule fails.

Exercise 1: Work Queues - Summary



1. From the Main Menu, select Queues, Registration Work Queue Summary.

This will bring up a listing of all the available work queues containing cases. If a queue does not contain any cases it will not be displayed in the list. Additionally, if a user does not have security access to a specific queue it will not appear in the list.

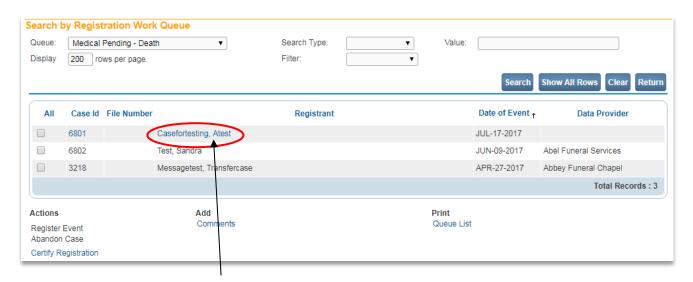
The default sort order is by **Queue Name**. However, the column headers summary tables are all underlined links. Clicking on any of these links will re-order the table based on that columns content.



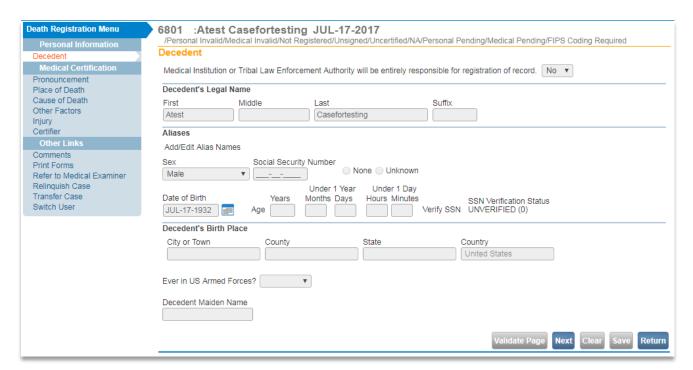
2. Queue Name indicates the type of work that needs to be done in the queue, **Type** indicates which type of event, (Death or Fetal Death), the queue contains work for. **Count** indicates how many cases are in the queue. **Age of Oldest in Days** indicates the age of the oldest case in the queue.



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



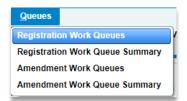
4. Click on the **Registrant** name link to display that record for review or editing. This will open up record and display the Decedent Page.





Exercise 2: Work Queues - Search

Skills Learned: You will learn how to search for cases based on their queue status.

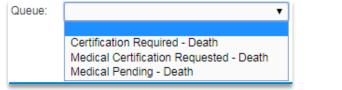


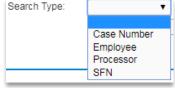
1. From the Main Menu select Queues -> Registration Work Queues. This will open the Search by Work Queue window.

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



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

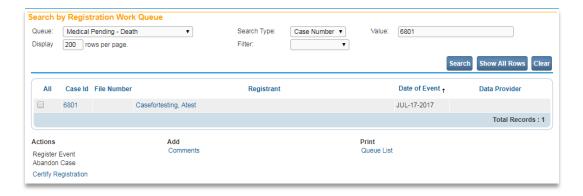




3. To narrow your search you can use all three or a combination of the three search parameters. However, you must always make a selection from the **Queue** dropdown list.

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

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





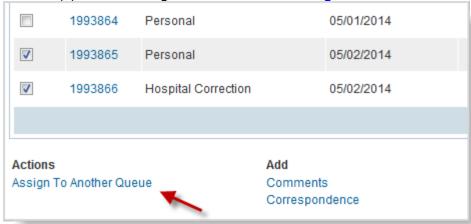
Exercise 3: Work Queues - Assign to Another Queue

Skills Learned: In this exercise you will use the **Assign to Another Queue** functionality to move a registration from one work queue to another.

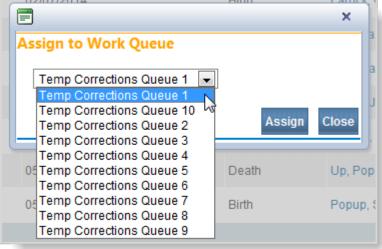
Sometimes, there may be many records in a single queue. In order to help evenly distribute the work load and more efficiently process records, cases can be moved into temporary work queues that are then assigned to specific personnel.

The **Assign To Another Queue** link allows users to assign cases from a central queue to smaller employee-specific queues in order to distribute the workload.

1. To move one or more cases from one queue to another, select the checkbox(es) ✓ next to the case(s) to be re-assigned and select the Assign To Another Queue link.

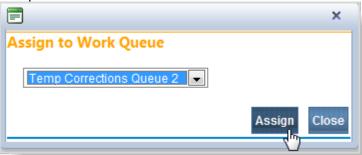


A dropdown of available queues appears. The list displayed will be filtered based on the type of
originating queue (registration, amendment) and the user's security privileges. The list will include
only those queues which have been configured as "Manual" in Table Maintenance.





3. Select the desired manual work queue and select the **Assign** button to move the case to the new queue.



After selecting a new queue from the dropdown:

- The new work queue assign status will update/replace the original work queue status.
- The work queue page refreshes and the new queue to which the case was assigned displays.

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

Order Processing

From the Main Menu, **Order Processing** is where you will look up records from outside of your county or local health department. You will not be able to see or issue the record, but you can search for and locate it.



Appendix 1 - Glossary of Icons and Controls

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

- **Auto-populate Button**: Automatically populates information in one field based on data entered in another. For example, based on data entered in the *Date of Birth* field, selecting the *Auto-populate* button calculates the age and populates the *Age* field.



Calendar Icon: Launches the interactive Calendar and is placed next to date entry fields. The Interactive Calendar is an alternative to manually entering the date.

1. Launch the calendar by selecting the Calendar Icon next to the date entry field:



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



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



Note: Selecting the calendar's *Today* link enters the current date in the date field.

Pressing the F12 button on your keyboard does this as well.

Checkboxes: Checkboxes allow users to make one or more selections from a variety available options. To select or de-select a checkbox, simply click inside the box .



Note: If a Checkbox or Radio Button has focus: - Use the Spacebar to "press" and select the button, or - Use the Enter key to "press" and select the button.

Validate Page Next Clear Save Return **Buttons** initiate various functions within the application. They are used to navigate the application, accept data input, write information to the database, and trigger the processing of underlying system code. Fix Icon: Appears in the DRIVE Validation frame only. Selecting this icon will place the focus or cursor in the item containing invalid information. Label Control: Identifies a nearby text box or other control. Marital Status Indicates what type of information is expected in that control. More Icon: A DRIVE specific element that returns more information than what is currently displayed. LOV Icon: A search tool used in the DRIVE application. LOV Eraser Icon: Removes values selected using the LOV search tool. **Place Search Icon:** Launches a popup that facilitates the entry of city, state, county and/or country. Radio Buttons: Allows the user to choose only one of a predefined set of options Required Controls: All controls accompanied by small red arrows are mandatory and must be completed or attempts to save the page will cause a pop up error message to appear. The data must be completed before the user can continue. Show Tooltips Show Tooltips Checkbox: The Show Tooltips checkbox under the Help menu controls whether 'hint' text is displayed when hovering over an icon or control. **Text Box Control**: Allows user to enter information that will be used by the program. Date of Birth Can be formatted to accept only text, a combination of text and numbers, numbers only, or dates. 5 6 7 8 9 10 ... Last **Table Paging**: When a table of data contains more rows than can be displayed on a single page, DRIVE™ provides a set of controls located at the bottom of the search results page that displays the page currently selected, the total number of pages of search



results, and links to the other search result pages.



The number of the selected page appears as bold text. The **First** and **Last** links allow users to easily jump to the beginning or ending of the search results.

In addition to providing links to quickly access the **First** page, pages **1 – 10**, and the **Last** page of the search results, the total amount of pages available for selection can be easily revealed by selecting the ellipsis link (...).



If the number of records returned is greater than the system preference for the maximum records allowed, **DRIVE** will display a warning message encouraging the user to refine search criteria. The message below was displayed on the search results page when a user attempted to search for all death records within a 2 year time span.

The number of records found matching the criteria entered is greater than the value specified for "Maximum records to display:". Please refine your search criteria or increase the system preference value for "Max Rows to Return".

Please note: Increasing this number will negatively impact system performance. Therefore, it is recommended that the user key additional search criteria in order to limit the number of matching events instead of viewing all matching events.

Total Records: 10,677

Not all pages will require table paging. In some cases it will be more useful to show a very large result set and use scroll bars to see the records that extend below the browser window.

- - Validation Checkmark-Green: this is a display only icon. Clicking on it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DRIVE** information page contains valid information.
- Validation X Symbol-Red: this is a display only icon. Clicking on it has no effect. This icon is used in the Death Registration Menu and indicates that a DRIVE information page contains invalid information that must be corrected before certification will be allowed.
- Validation Caution Symbol-Yellow: this is a display only icon. Clicking on it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DRIVE** 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 **DRIVE** application. These hints will actually help you with almost any Windows based application.

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



If a Dropdown menu has focus it will be highlighted in blue. Once the dropdown is opened, a user can choose from a list of values.



A Checkbox or Radio Button will be surrounded by a dotted line when it receives focus. The box can then be selected by the user by pressing the keyboard space bar.



Passing the Focus: Moving between these controls is a matter of passing the focus. This is accomplished by using the following keyboard shortcuts:

- The Tab key advances the focus forward
- Alt+Tab (holding down the Alt key while pressing Tab) passes the focus back to the previous control.

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

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

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



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

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

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

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

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

Did You Know?

Using Alt-Left Arrow is the same as using your web browser's 'Back' button.

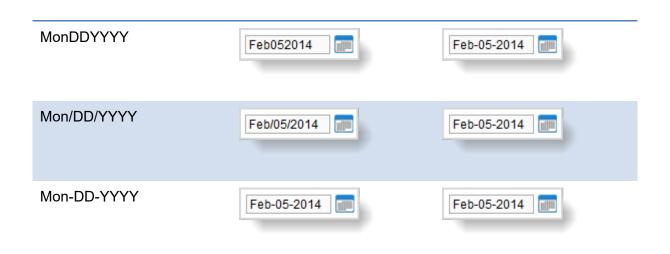
Using Alt Right Arrow will trigger your browser's 'Forward' button.

3. Standard Date Formats:

DRIVE uses a standard date format but is flexible enough to recognize and convert other formats users may enter. Formats accepted for conversion are illustrated below:

Input Formats	Typed As:	System Converts to:
MM-DD-YYYY	02-05-2014	Feb-05-2014
MM/DD/YYYY	02/05/2014	Feb-05-2014
MMDDYYYY	02052014	Feb-05-2014



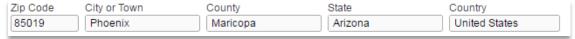


Did You Know?

- 1. Selecting F12 will automatically key today's date into the selected date field.
 - 2. Entry of dates in any other date format will result in an error.
- **4.** Zip Code Auto-Populate Address Zip code based auto-population controls are built into the DRIVE™ application to assist users in entering address data accurately and efficiently.



The **Zip Code** field appears as the first entry amongst the address location fields of: *City or Town, County, State* and *Country*. Upon entry of the *Zip Code*, the *City or Town, County, State* and *Country* fields will auto-populate.



If the *Zip Code* entered has multiple *City or Town* or *County* associated options, the system will display a list of valid values to choose from.



Did You Know?

The Zip Code auto complete feature is optional and can be turned off in DRIVE through System Preferences.

