# Searching for a Case

## Role(s): Funeral Homes

## Objective

This job aid provides the necessary steps to navigate from the Home Screen to an existing case. This will include:
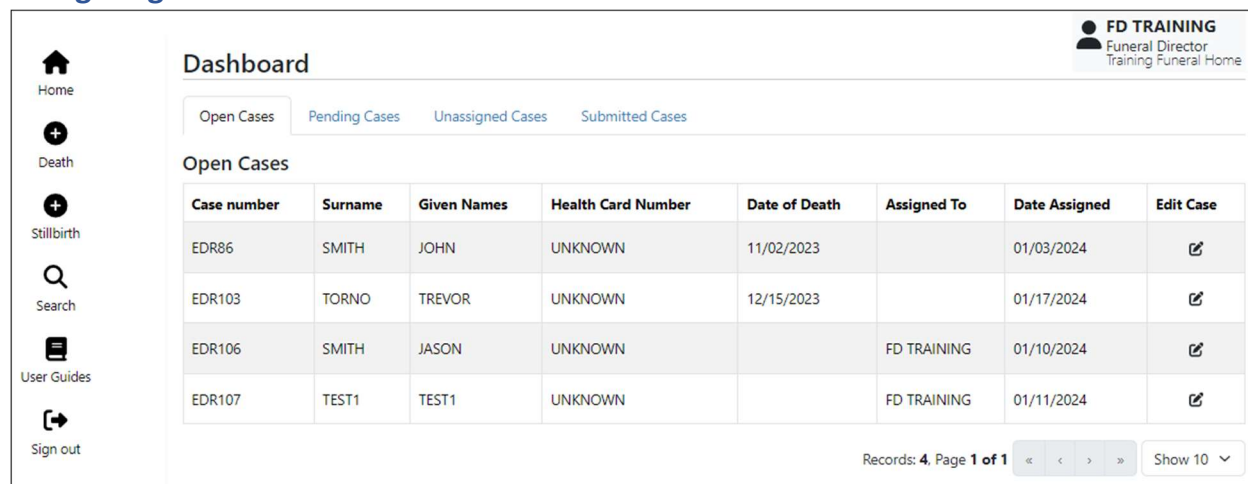
- Navigating to the correct Dashboard tab containing the case
- Navigating through the list to find a specific case and opening it to view or edit
- Using the search from the toolbar

## Precondition

The user is logged in to the system and is on the EDRN Home Screen where the Dashboard resides.

## Procedural Steps: Searching for a Case

### Navigating the Dashboard



1. Click **Home** ![Home icon] toolbar button if the Dashboard is not currently displayed.

2. Click on one of the following tabs depending on the status of case being searched for:

| Open Cases | The **Open Cases** tab displays a list of the facility's currently assigned cases that have not been certified. Cases that have been |
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| | generated from a paper MCD, that are being worked on but not yet signed, will be listed here. |
| Pending Cases | The **Pending Cases** tab displays a list of the cases that have created from an MCD that hasn't yet been certified but have been assigned to the facility. The SOD can't be created until the MCD is certified. |
| Unassigned Cases | The **Unassigned Cases** tab displays a list of cases that were submitted while the funeral home was not known. |
| Submitted Cases | The **Submitted Cases** tab displays list of signed cases submitted within the last three months<br><br>*NOTE*:  *For cases older than 3 months, use the Search toolbar button. (See "Finding a Case from the Search Toolbar Button" in this job aid.)* |
| | |

## Searching for a Case from the Dashboard

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3.   Navigate through the list of cases using the **Record** Navigation Bar. The options for navigation are:

| | |
|---|---|
| « | Click **Start of Records** to navigate to the first page of the current tab |
| ‹ | Click **Previous Page** to navigate to the previous page of the current tab |
| › | Click **Next Page** to navigate to the following page of the current tab |
| » | Click **End of Records** to navigate to the last page of the current tab |
| Show 10 ⌄ | Click **Show 10** to change the number of cases displayed per page. Click the drop-down arrow to choose from 5, 10, 20, 30, 40, or 50 |

4.   If the case appears in the list, open it by pressing the **View Case** or **Edit Case** icon.

*NOTE:*   *If the case appears in the "Unassigned Cases" list, the case must be first assigned to the funeral home. This is completed from the Case Admin tab once the case has been opened.*

## Finding a Case Using the Toolbar Search Button

The Search function is used to find cases that no longer appear on your Submitted Cases tab of the Dashboard. The Search function will display all cases the funeral home has access to, regardless of date, status, or assignment.

Search criteria can be entered through a variety of fields found on the search page. The more criteria entered, the narrower the search results.

To broaden your search or when uncertain of the spelling of a surname or given name, wildcards can be used within the search criteria to replace one or many characters.

The *asterisk can be used in place of any number of characters when uncertain of spelling. For example, THOM* would return search results of any names that begin with THOM and end with any possible combinations, such as THOMAS, THOMPSON, and THOM.

The ?question mark can be used in place of any one character. For example, THOM?S would return search results such as THOMAS, THOMUS, THOMES.



1.   Click **Search** ⌕Search from the vertical toolbar on the left side of the window. The **Search** window will open to add search criteria. (Shown above).

2.   Choose the criteria to be entered from the options below:

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| ***NOTE:*** | *Wildcards cannot be used in the "Case number" field.* |

a.   **Case number**: Type the *Case number* if known.

     b.    **Case status:** Click the *Case status* dropdown list and choose the appropriate **case status.**

     c.    **Burial Permit Number**: Type the Permit Number of decedent if known.

     d.    **Surname:** Type *Surname* of decedent if known.

     e.    **Given names:** Type *Given names* of decedent if known.

| *NOTE:* | *Surname* and *Given names* *fields are not case sensitive.* |
| --- | --- |

     f.    **Exact Date of Death:** Click the **Yes** radio button and enter the date, if known. Otherwise, click **No** and enter a date range.

3.    Click **Search.** Search results will display below the Search window:

| Case number | Surname | Given Names | Date of Death | Case status | View Case |
| --- | --- | --- | --- | --- | --- |
| EDR13 | TAYLOR | TRINITY | 04/14/2023 | UNASSIGNED | ☑ |

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4.    Click the corresponding **View Case** ☑ icon of the correct case from the list.

**End of Procedure.**