

## Assigning an Unassigned Case to Your Funeral Home

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**Role(s):** Funeral Director, Clerk

### Objective

This job aid provides the necessary steps to viewing and assigning a case to your facility when a funeral home has not been identified on Medical Certificate of Death (MCD), including:

- Search for case from Unassigned Cases.
- Assign case to your facility.

|              |                                                                                                                                                                                                                          |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>NOTE:</b> | <b>CASE ASSIGNMENT:</b>                                                                                                                                                                                                  |
|              | <i>When a funeral home is not assigned on an MCD, the case will display to all funeral homes on the “Unassigned Cases” tab of each funeral home.</i>                                                                     |
|              | <i>When a funeral home is named on an MCD in progress, the case appears on the “Pending Cases” tab of the funeral home’s Dashboard. This feature allows a funeral home to plan for upcoming cases not yet certified.</i> |
|              | <i>Once the MCD is certified, it moves to the “Open Cases” tab of the funeral home’s Dashboard.</i>                                                                                                                      |
|              | <i>Cases are assigned to a funeral home, not an individual at the funeral home.</i>                                                                                                                                      |
|              | <i>A funeral home can assign their own cases to another facility, but must request a re-assignment from another funeral home to their own facility.</i>                                                                  |

### Scenario

An MCD was certified before the funeral home had been determined. The decedent’s family have been notified and now request that the decedent be transferred to your funeral home from hospital.

### Precondition(s)

To follow this lesson to completion:

- The user must be at the EDRN Home screen after login.
- The case must not currently be assigned to another funeral home.

## Procedural Steps: Assigning an Unassigned Case to Your Funeral Home

The case will appear in the Unassigned Cases tab of the Dashboard. Once opened, the user will go to the Case Admin tab to assign it to their own facility, removing it from the unassigned cases tab.

### Search for Unassigned Case


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## Dashboard

[Open Cases](#)
[Pending Cases](#)
[Unassigned Cases](#)
[Submitted Cases](#)

### Unassigned Cases

Unassigned cases are cases that have had the Medical Certificate of Death signed but the funeral home that will be handling the case was not known at the time of certification.

If you are expecting a case but it is not in your Open Cases or Pending Cases queue, please check the unassigned cases below.

You can assign an unassigned case to your funeral home from the Case Admin tab when viewing the case.

| Case number | Surname | Given Names | Health Card Number | Date of Death | View Case                                                                             |
|-------------|---------|-------------|--------------------|---------------|---------------------------------------------------------------------------------------|
| EDR55       | ROAD    | ROD         | UNKNOWN            | 08/24/2023    |    |
| EDR98       | UNKNOWN | UNKNOWN     | UNKNOWN            | 12/15/2023    |    |
| EDR103      | TORNO   | TREVOR      | UNKNOWN            | 12/15/2023    |   |
| SBEDR565    | SMITH   | BABY        |                    | 08/18/2023    |  |

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Show 10 

1. Click the **Unassigned Cases** tab to visually search for the case.

**NOTE:** Funeral homes can re-assign a case to another funeral home, but cannot reassign another funeral home's case to their own facility. Phone or email the other facility to request the re-assignment.

2. Click the **View Case** button on the View Case column of the correct case.

**NOTE:** If the case does not appear on the Unassigned Cases tab, this could mean the case has been assigned to another funeral home. Use the "Search" tool found on the toolbar on the left hand side of your screen. This search function allows you to search through all cases, regardless of assignment, status, or timeframe.

## Case Admin Tab

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### Statement of Death - TREVOR TORNO

Summary

Case Admin

#### Case Admin

Case number

EDR103

Record status

UNASSIGNED

Assign to my facility

#### Assigned To Facility

Funeral home

#### Assigned By

Funeral Home assigned by

Date assigned

#### Medical Certificate of Death

Name of Medical Informant

HEALTH EDRNTEST1

Date of signature

01/17/2024

3. Click the **Case Admin** tab.

4. Click **Assign to my facility** button.

**NOTE:** The Summary and Case Admin tabs are the only options prior to assignment of case to your facility.

"Case Admin" tab displays an "Unassigned" "Record Status". "Assigned to Facility" field is blank. These will update once the "Assign to facility" has been completed.

If you assign this case to another funeral home, the "Assigned to Facility" will reflect this change, but you will no longer see the case on your Dashboard.

A funeral home cannot reassign another funeral home's case to their own facility

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## Statement of Death - TREVOR TORNO

Deceased  
Information

Parent  
Information

Informant  
Information

Disposition  
Information

Death  
Information

Certification

Case  
Admin

### Case Admin

Case number

Record status

Reset Case

EDR103

ASSIGNED

### Assigned To Facility

Funeral home

TRAINING FUNERAL HOME

### Assigned By

Funeral Home assigned by

Date assigned

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TRAINING FUNERAL HOME

01/17/2024

### Medical Certificate of Death

Name of Medical Informant

Date of signature

HEALTH EDRNTEST1

01/17/2024

**NOTE:** The "Assigned to Facility" section on the "Case Admin" tab has been updated to match your facility. This case will now show on "Open Cases" tab of your facility's Dashboard.

"Assign to my facility" button has changed to "Reset Case". Prior to SOC signing, this feature quickly removes any manually entered text across all tabs during the SOD creation process.

5. Proceed with completion and signing of SOD.

**NOTE:** See the "Creating an SOD" job aid for steps to complete the SOD.  
All mandatory fields, displayed in red text, must be entered prior to signing SOD.

**OR**

6. Click **Save** icon from toolbar on left hand side of your screen if you have entered data but unable to complete the SOD at this time.

**NOTE:** If you are unable to complete the SOD at this time, your case will show on your facility's Dashboard on the "Open Cases" tab.

Once you complete and sign the SOD, the case will move to "Submitted Cases" of your facility's Dashboard.

**End of Procedure.**