

OFFICE OF THE CHIEF MEDICAL EXAMINER

OCME PORTAL QUICK REFERENCE GUIDE

FUNERAL HOME ADMINISTRATOR/USER

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OCME PORTAL OVERVIEW

The OCME Portal consists of 3 modules: Cremation Module, Release Module, and User Management Module. The OCME Portal is intended to improve communication between the OCME and its customers, streamline processes, and expand visibility of all cremations and OCME cases completed in the Commonwealth of Massachusetts. Email alerts, status updates and 'Notes' capability provide funeral homes with frequent communication, allowing all parties to understand where in the process each cremation or OCME case resides. **It is recommended to use the Google Chrome browser when accessing the portal.** A brief description of each module is described below:

CREMATION MODULE

MA General Law requires that when a decedent is to be cremated or buried at sea, there is a view and verification of identification that must be completed before the cremation is legally authorized to proceed. Any decedent (non-OCME case) that will be cremated in the State of Massachusetts must be registered through the Cremation module of the OCME Portal. (NOTE: If it becomes an OCME case, it can be transferred to the Release module. Any OCME case that is also a cremation should begin in the Release module.) The Cremation Module color scheme is green to help differentiate from the Release Module.

RELEASE MODULE

The Decedent Release Module is the component of the portal which handles OCME Cases. Funeral homes register decedents within this module and submit decedent vitals and documentation. Once the OCME reviews and approves a decedent application, the funeral home may schedule a date/time to pick-up the decedent.

USER MANAGEMENT MODULE

The User Management module is where Funeral Home Administrators can manage the funeral home location(s) and users. In this module, administrators can create new users, update existing users, and reset user passwords.

REGISTER FOR THE PORTAL

Only **new funeral homes and livery service organizations** will need to register for the portal and include **one Admin user**. Once your funeral home or livery service have been registered, additional users and locations can be created by an Administrator of your organization, without needing approval from the OCME.

- Go to the OCME Decedent Release Portal site: <https://ocmerelease.stonewallsolutions.com/>
- Click the link **'Register for access to Funeral Home/Livery Service Portal'**
- Select the Organization Type from the radio button
- Enter the organization's information in the designated fields. For funeral homes, you will need to upload a picture of the Funeral Director's License.
 - You may have multiple funeral directors in your organization, but only one license per organization is required to be uploaded.
- In the next section, **you must create a primary user for the funeral home/livery service**. This first user will be an Administrator, and they will be able to create additional users within your organization.
 - Create a username
 - Be sure to use your primary email address as the email contact. This is the email where your temporary password will be sent. You will not create a password until your account has been approved by the OCME.
 - Click Create to submit the organization request. The OCME will review the account. Once they approve it, **the administrator will receive an email with a temporary password to log in**.
 - Upon entering your username and the temporary password, you will be prompted to change it to a permanent password.

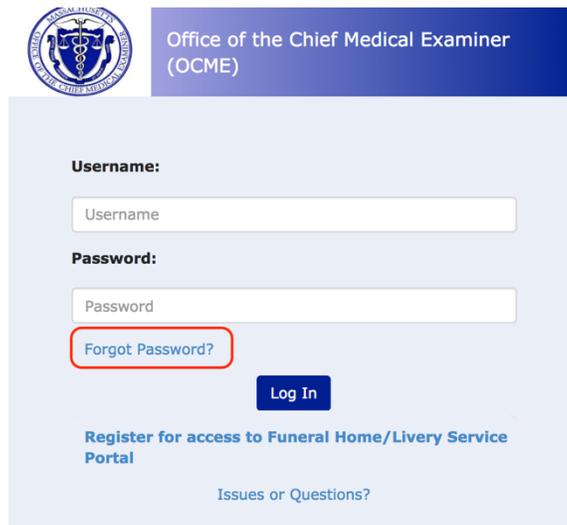
The screenshot displays the OCME registration portal. On the left is a login section with fields for Username and Password, a 'Log In' button, and a link for 'Forgot Password?'. Below the login section is a red-bordered box containing the text 'Register for access to Funeral Home/Livery Service Portal' and a link for 'Issues or Questions?'. On the right is the registration form, which includes fields for Primary Organization Name, Street Address, State (a dropdown menu currently showing 'Massachusetts'), Zip Code, Organization Email Address, and Website. Below these fields is a yellow note: 'Please note: You do not need to create a password on this form. When the OCME approves your request for access, you will receive an email containing your temporary password.' Underneath the note is the 'Add User' section, which has fields for First Name, Last Name, Username, and Email Address. At the bottom of the 'Add User' section are three buttons: 'Create', 'Clear', and 'Cancel'. A red arrow points to the 'Create' button.

LOG IN

- Go to the OCME site: <https://ocmerelease.stonewallsolutions.com/>
- Log in with your username and password to be directed to the OCME Decedent Release Portal.
 - Your username and a temporary password will be sent to your email when your profile is first created. You will be prompted to change your temporary password. Keep your username and password in a place you can remember!

FORGOT PASSWORD

- On the login screen, click Forgot Password? link.
- Enter the username in the field and click Submit.
- A temporary password is sent to the associated email address that appears in the pop-up.
- Log in with username and temporary password.
- In the prompt, enter the temporary password, create a new password, and re-enter new password.



 Office of the Chief Medical Examiner
(OCME)

Username:

Password:

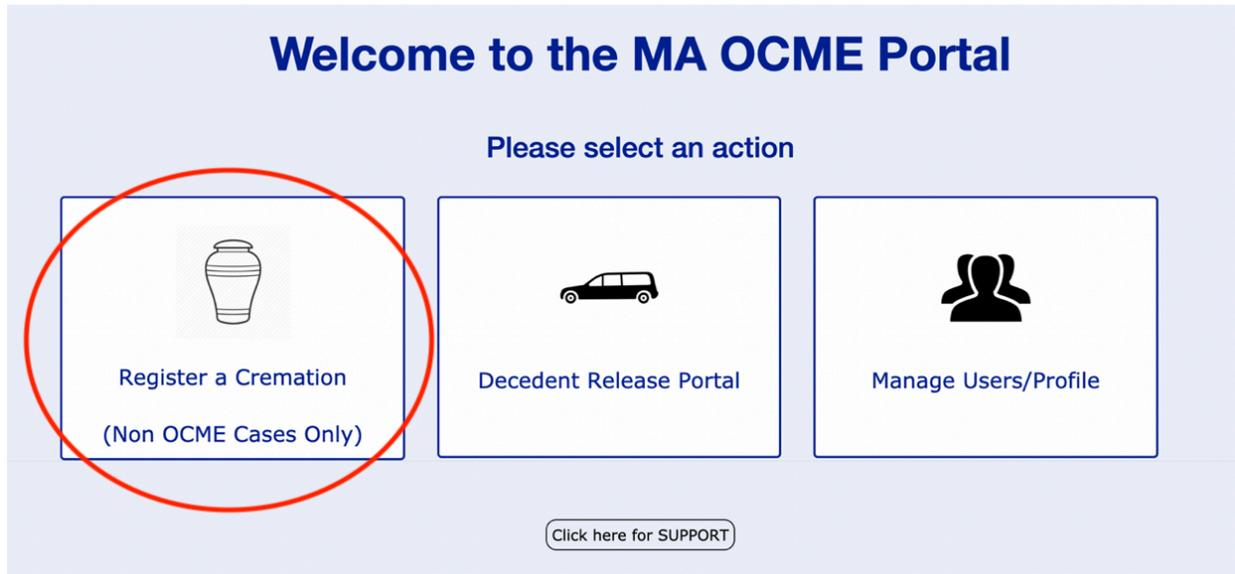
[Forgot Password?](#)

[Register for access to Funeral Home/Livery Service Portal](#)

[Issues or Questions?](#)

CREMATION MODULE

After logging into the system, you are directed to the **main menu**. Click Register a Cremation (Non OCME Cases Only) button to access the Cremation Module.



The Cremation registration process generally follows the below steps*:

- Funeral Home creates a new cremation registration by entering decedent information, selected crematory information and decedent drop-off details. Funeral Home includes mandatory paperwork.
- Funeral Home makes \$200 cremation payment through the portal, then receives Barcode Confirmation.
- Funeral Home affixes the barcode to the decedent and brings the decedent to the selected crematory at the appropriate date/time.
- Cremation Specialist/Forensic Investigator arrives at crematory and performs decedent examination.
- Cremation Specialist/Forensic Investigator approves and signs Cremation Authorization Form.
- Cremation Authorization Form is sent via email to Funeral Home/Crematory.
- Crematory can now cremate the decedent and funeral home arrangements can proceed.

***Please Note:** This is the *approximate* schedule of events. Each case may be different, so be sure to monitor your emails and review all comments within the registration.

REGISTER A NEW CREMATION

- On the Cremation Module home page, click Register New Cremation button or select it from the top navigation menu.

Decedent Cremation Portal



- Enter the decedent details in the Decedent Information section.
 - If the decedent requires a view at the funeral home, you must provide a reason.
- Upload and attach the Attestation Document and the Informant Verification Form in the Upload/Attach Documents section. You may attach additional documents by clicking the +Additional Documents link.
- Click Submit to proceed to the next step.
 - If you do not have all of the decedent information and/or required forms, you can choose to Save Draft and return to the existing draft at a later time.
- Review and confirm the details on the next page, then click 'Continue to Process Payment'.
- YOU WILL BE TEMPORARILY REDIRECTED TO THE FISERV PAYMENT PAGE TO MAKE PAYMENT.
- Enter the payment details, then click 'Continue'. Process payment on the following page.
- You are redirected back to the Cremation site and will receive a Confirmation page with a barcode. Please affix the barcode to the container which accompanies the decedent to the crematory.

Your cremation has been registered successfully!
Please drop off the decedent at the selected crematory by
01/16/2020 after 12:00 PM

Funeral Home : TEST-BOSTON1

Decedent Name : JOHN SMITH

Decedent DOB : 10/10/1950

Drop off Location : Blue Hills

Drop off Date : 01/16/2020

Drop off Time Range : PM (after 12:00 PM)



Please securely affix this receipt to the body.

Close Save as PDF

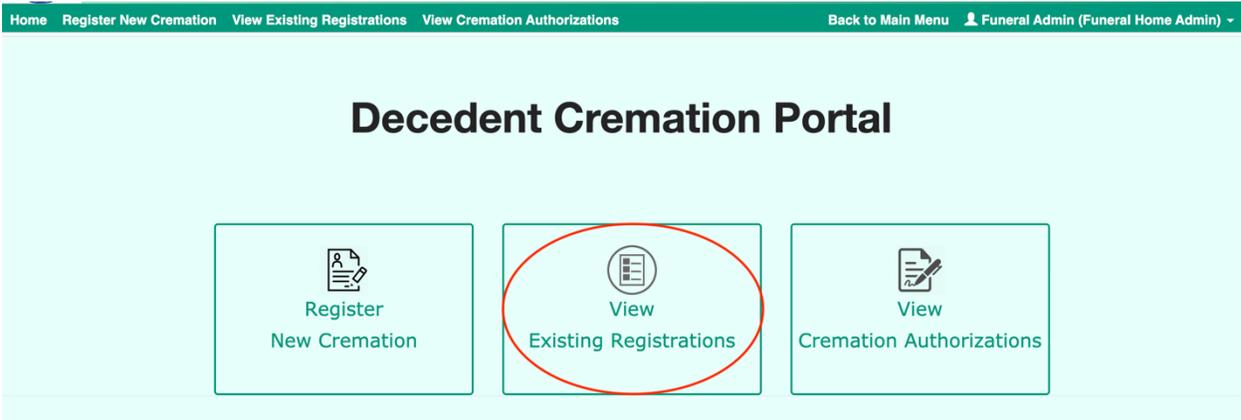
VIEW EXISTING REGISTRATIONS

Existing Registrations are cremation applications that are saved as drafts or have been submitted for review. An explanation of each Status is described below:

- **DRAFT:** This is a registration that has been started (whether complete or incomplete) that was **not yet paid/submitted**. (For example, if a payment method has been declined, then the application would save as a draft, and the funeral home does not have to start a new registration.) A funeral home can save a draft if they still need to gather documents, information, or a payment method.
- **SUBMITTED:** This registration has been submitted to the selected Crematory and the OCME staff. It has not yet been reviewed or authorized.
- **DECEDENT NOT PRESENT ON ARRIVAL:** The registration has been paid/submitted. The examiner went to the crematory, but the decedent was not present at the location yet. This is on hold until the decedent is brought to the crematory and the examiner returns to the location. (Please note, the examiner may not return the same day depending on their schedule.)
- **FLAGGED FOR FOLLOW-UP:** A case may be flagged by the person reviewing the case for a number of reasons. This status will always be accompanied by a reason. This status indicates the review is not yet completed.
- **DECEDENT MOVED TO OCME:** It has been determined that this decedent is being transferred to the MA OCME office for further review. You will need to continue the release process in the Release Module. All information that was entered in the Cremation Module has been transferred to start a 'Draft' application in the Release Module.
- **AUTHORIZED:** This cremation registration has been authorized. You can view and print the Cremation Authorization by clicking View Cremation Authorizations (*see View Cremation Authorizations section below for details*).
- **REJECTED:** This registration has been rejected. The person rejecting the case will add comments/reason for rejection.

To access a draft or a submitted registration:

- On the Cremation Module home page, click View Existing Registrations button or select it from the top navigation menu.



- Use the search filters to narrow down the results below the Search fields.
- Select Edit or View in the Action column of the correct registration. *If you do not see an Action column, click the green plus button, then click View/Edit.

- You will only see Edit if the registration is saved as a Draft.
- You will see View if the registration has been submitted because you can no longer edit the information.

Existing Registrations

Decedent First Name Decedent Last Name Status

Place of Viewing

Drop off Date Range From: To:

Show 10 entries Search:

Funeral Home Name	Decedent Name	Place of Viewing	Drop Off Window	Date Submitted	Status	Action
Brooke's Funeral Home	SMITH, JOHN	Crematory	01/16/2020 PM	01/16/2020 1:36PM	Submitted	View

REQUEST A REFUND

In the case that a cremation is no longer taking place, you may have the option to request a refund through the portal. Once the decedent examination process has begun, you can no longer request a refund.

- Follow the steps above to view an existing registration.
- Once you're in the correct registration, click "Request a Refund" button at the bottom.
 - **If the button is greyed out, it means that the examination process has begun, and the refund request option has been disabled.**
- Enter a reason for the refund request, then click Submit.
- The request is submitted to the OCME for review. They may choose to process the refund or deny the request. You will be notified of the approval or denial of the request via email. You can also view the status of the refund within the decedent's registration.

Decedent First Name
JOHN

Decedent Last Name

Decedent DOB
10/10/1950

Select the date you will bring the cremation to the crematory
01/16/2020

Location of Death
BOSTON, MA

Additional Notes/Comments

Close

Request a refund

Please enter a reason for requesting a refund for this cremation. This refund request may be approved or denied. Please monitor your email for updates.

Add Comment..

Close Submit

Upload/Attach Documents

Testamentation Document

CMS data extraction v2_update

Informant Verification Form

CMS data extraction v2_update

Status

Submitted

[Request a Refund](#) [Close](#)

VIEW CREMATION AUTHORIZATIONS

Once a decedent has been examined and the examiner resolves that the authorization is complete, they will sign a Cremation Authorization Certificate. Upon signature, the funeral home is notified via email alert that the authorization has been completed. The funeral home can log into the system and print the Authorization Certificate for the crematory. This will provide legal proof that the cremation has been deemed accepted.

- On the Cremation Module home page, click View Cremation Authorizations button or select it from the top navigation menu.

Decedent Cremation Portal

Register
New Cremation

View
Existing Registrations

View
Cremation Authorizations

- Use the search filters to narrow down the results below the Search fields.
- Select View in the Action column of the correct decedent. *If you do not see an Action column, click the green plus button, then click View.

Search Cremation Authorizations

Decedent First Name:

Decedent Last Name:

Place of Viewing:

Select Crematory:

Dropoff Date:

Dropoff Window Time:

View Cremation Authorizations

Show entries Search:

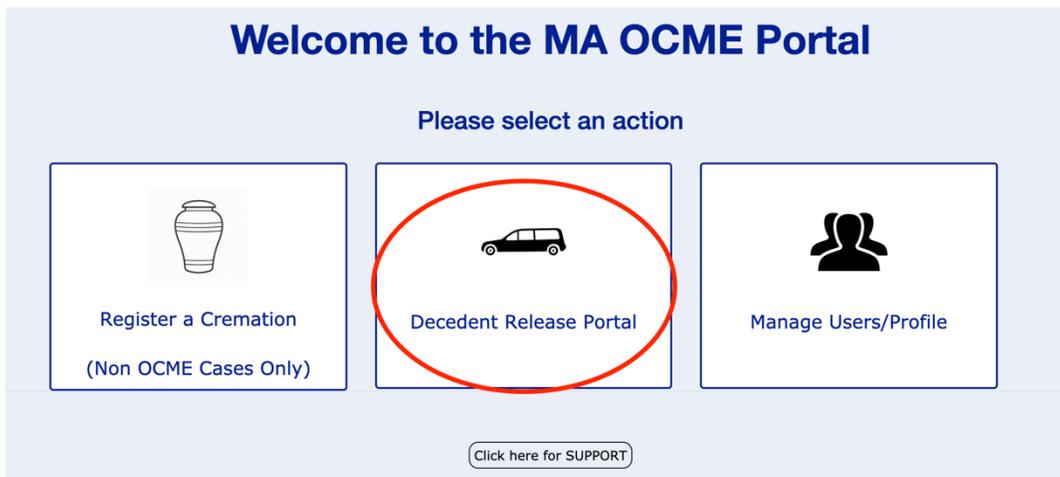
Funeral Home Name	Decedent Name	Place of Viewing	DropOff Window	Status	Action
A J Spears Additional Location	SMITH, JANE	Crematory	01/23/2020 AM	Authorized	View
A J Spears Funeral Home	DOE, JOHN	Crematory	01/24/2020 AM	Authorized	View

Showing 1 to 2 of 2 entries Previous Next

- Hover your mouse at the top of the Authorization Certificate and a menu will appear with the option to print (Google Chrome). Print a hard copy of the Authorization Certificate for the crematory and/or your own records if necessary. You will always have access to the electronic version of the authorization.

RELEASE MODULE

After logging into the system, you are directed to the **main menu**. Click Decedent Release Portal button to access the Release Module.



The release process general follows the below steps*:

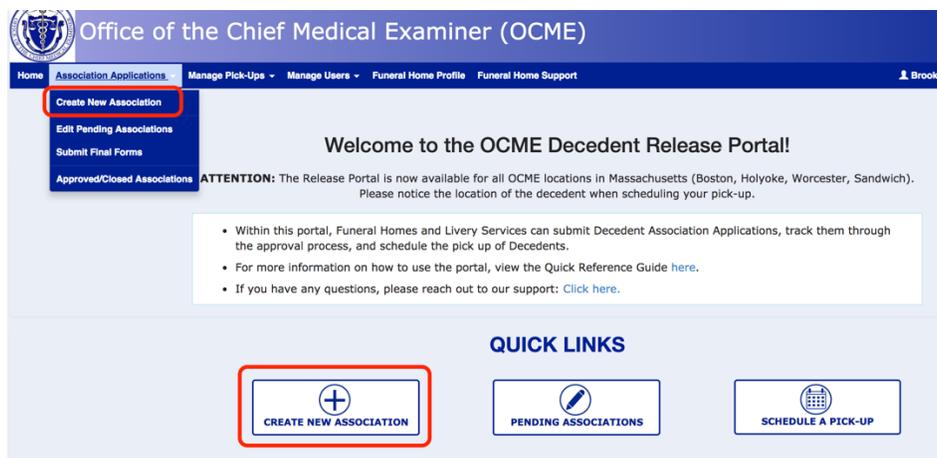
- Funeral Home starts process by submitting a new Association Application
- OCME Admin reviews the case and assigns an OCME Case Number. Admin will add comments and attach necessary forms for Funeral Home to submit. (Necessary details/forms are determined on a case by case basis) Application is sent back to Funeral Home for updates.
- Funeral Home updates application with necessary edits and/or forms.

- OCME Admin reviews application updates, and marks application Approved/Ready for Pick-up *only* if the Doctor has determined that the decedent examination is complete.
- Funeral Home schedules pick-up of the approved decedent through the scheduling function.

***Please note:** This the *approximate* schedule of events. Each case may be different, so be sure to monitor your emails and review all comments by the OCME within the application.

CREATE NEW ASSOCIATION APPLICATION

To begin the process, you must submit the decedent vitals to the OCME. To start an application for a new decedent, follow the steps below. Please note: Once an application is submitted, it is temporarily locked from editing to prevent changes from being made while the OCME is reviewing it. If there are mistakes or forms required, the OCME will change the status and send it back to you.



- Select Association Applications from the navigation bar, and click Create New Association from the drop-down. You can also click the 'Create New Association' on the home page under Quick Links.
- If your funeral home has multiple locations, select the location from the drop-down.
- Select the OCME location of the decedent. If the decedent is not at the selected location, the OCME will reroute the application to the correct location.
- On the Create Decedent Association form, fill out required information:
 - Decedent Information
 - Add Children or Parents
 - Next-of-Kin Information
 - Additional Information:
 - This is where you will add any special requirements or attach necessary documentation.
 - Click Attach Files to drag and drop or upload files.
 - Add notes/important information to Comments section.

Additional Information

Please ensure you attach the Release form

File Name	Action
Statement of Identification	  Download / Delete

[Attach Files](#)

Comments *Add comments here ... (special requirements, decedent being cremated out of state, I have a questions for the OCME... etc)*

VIEW/EDIT EXISTING ASSOCIATION APPLICATIONS

VIEW ASSOCIATION APPLICATION FOR AN OPEN CASE

Applications that are in the process of being reviewed by the OCME may be viewed only by the Funeral Home users. During the review process, the application is locked from the funeral home. This is to prevent any changes from being made so the reviewer does not miss any important changes/updates. If you missed anything or made any errors, contact Support and they can change the status for you, otherwise the OCME will send it back to you once they've reviewed for you to add the additional information.

- Select Association Applications from the navigation bar, and click Edit Pending Associations from the drop-down.
- Search submitted associations by Decedent name, OCME #, or status.
 - The OCME will add the OCME # when they've reviewed the application.
- In the Action column, select View for the application to be viewed.

View/Edit Pending Associations

Decedent First Name: Decedent Last Name: OCME #:

Status: Funeral Home:

[Search](#) [Clear](#) [Cancel](#)

Show entries

OCME #	Decedent Name	Funeral Home	Status	Ready for Pick Up	Date Submitted	Action
	MISSION, CAROLINE	Benjamin Funeral Home	Awaiting Review	-	01/04/2019 1:26PM	View

EDIT EXISTING ASSOCIATION APPLICATION FOR AN OPEN CASE

Applications that require additional information can be edited by the Funeral Home Administrators/Users. If an application requires attention, you will receive an email alert to log into the system and review the application. **NOTE: Applications that have been approved (whether the decedent is ready for pick up or not) are in a separate queue.**

- Select Association Applications from the navigation bar, and click Pending Association from the drop-down.

- Search applications by Decedent Name, OCME # or status.
- In the Action column, you may select Edit for applications that are in the status of: Funeral Home Review-Errors or Funeral Home Review-Forms Required.
- In the Required Forms section, the OCME may have included some forms. Click on the blue link to view a PDF of the document. You can print or download the file based on what browser you're using.
 - Forms in the 'Download Files & Share with Family' field should be downloaded, printed and given to the family of the Decedent.
 - Forms in the 'Download Files & Submit to OCME (attach in Additional Information section)' field should be downloaded, filled out with any required information, then reattached in the Additional Information section.
- Recent comments made by the OCME will be in the Comments section below the status.
- To view past comments and activity, check the scroll of comments/status changes in "Application Status History."
- When you have fixed any errors, downloaded/attached required forms, and/or completed any final information, click Submit.
- The application will be re-submitted to the Office of the Chief Medical Examiner for their review.

View/Edit Pending Associations

Decedent First Name: Decedent Last Name: OCME #:

Status: Funeral Home:

[Search](#) [Clear](#) [Cancel](#)

Show 10 entries

OCME #	Decedent Name	Funeral Home	Status	Ready for Pick Up	Date Submitted	Action
2019-99999	MISSION, CAROLINE	Benjamin Funeral Home	Funeral Home Review - Forms Required	-	01/04/2019 1:26PM	Edit

VIEW APPROVED/CLOSED APPLICATIONS

Once an application has been approved or closed, it may only be viewed by the Funeral Home users. You can view if the decedent has been marked as ready for pick up or not. Please note, you will receive an email alert when the decedent has been marked as ready for pick up. A closed application refers to the application of a decedent that has already been picked up. Funeral homes cannot edit approved or closed applications. **If you need to submit additional forms to a closed application, you can do so in the Final Forms section (see next section for steps).** If you need to change any information on an approved or closed application, please contact the OCME or Support.

Home Association Applications Manage Pick-Ups Manage Users Funeral Home P

Create New Association

Edit Pending Associations

Submit Final Forms

[Approved/Closed Associations](#)

Decedent

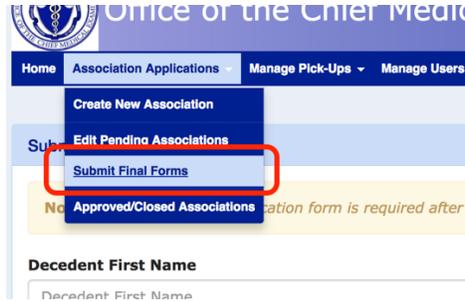
Status

- Select Association Applications from the navigation bar, and click Approved/Closed Associations from the drop-down.
- Search submitted associations by Decedent name, OCME #, or status.

- In the Action column, select View to view the approved application. You can still view/download attached forms, but no other information can be edited.

SUBMIT FORMS AFTER RELEASE PROCESS

After a decedent has been picked up from the OCME, you may need to submit additional forms, such as the Statement of Identification. To attach additional forms to a Closed Application, follow the steps below.



- Select Association Applications from the navigation bar, and click Submit Final Forms from the drop-down.
- Search closed associations by Decedent name, OCME #, check-in date, or if the statement of ID is required or already submitted.
- In the Action column, click Select to view the closed application.
- Click Attach Files in the Additional Information section and upload any necessary forms.
- Click Submit to send the final forms to the OCME.

NOTE: If required, please attach the Statement of Identification form in the Additional Information section.

Show entries Search:

Check-In Date	OCME #	Decedent Name	Barcode ID	Status	Required	Final Forms Status	Action
01/04/2019	2018-9898	Shannon Smith	816464243	Closed	No	Not Submitted	Select
06/01/2018	2018-11111	Justin Hartung	568491761	Closed	No	Not Submitted	Select
06/01/2018	2018-90909	Bryce Walker	568491761	Closed	No	Not Submitted	Select
07/24/2018	2018-89898	Test Test	136195529	Closed	No	Not Submitted	Select

Showing 1 to 4 of 4 entries Previous Next

Additional Information

+ Attach Files

Comments

MANAGE DECEDENT PICK-UP

SCHEDULE NEW PICK-UP

When the OCME has approved an application and the Decedent is ready for pick-up, you will receive an email alert that you can schedule a pick-up time. **Note: Only applications for decedents that have approved for pick up will display in the pick-up menu. If you have not submitted an application, or if you have not received confirmation that the decedent is ready for pick up, you will not be able to schedule a pick-up time yet.**



- Select Manage Pick-Ups from the navigation bar, and click Schedule New Pick-Up from the drop-down.
- Select the OCME location from where you will be picking up the decedent and click Next.
- Select the funeral home (if you have multiple locations within your account, more than one location may display.)
- A list of all submitted Decedents from your funeral home that are ready for pick up at the selected OCME location will be listed.
- Select the decedent(s) you wish to pick up.
- From the radio button asking if you will use a livery service, select either Yes or No.

Pick Up Using a Portal-Registered Livery Service

If you will be having a livery service which is registered within the portal perform the pick-up services, follow the steps below:

- IF YOU SELECT YES from the radio button asking if you will use a livery service:
 - Choose a livery service which is registered in the portal from the dropdown.
 - Select a date/time for delivery, and add any comments, then click Submit. **IMPORTANT:** This does not mean that the scheduling is complete. The livery service must accept the request and schedule the pick-up.
 - You will be redirected to the Manage Pending Requests page. For more information on this page, jump to Manage Livery Requests section of this training guide.

Schedule Your Own Pick Up (Not Using a Portal-Registered Livery Service)

If your own funeral home will be picking up the decedent, or if you are using a livery service which is not registered within the portal, please follow the steps below.

- IF YOU SELECT NO from the radio button asking if you will use a livery service:
 - Click Next

- Select a date from the calendar (preferably within 72 hours) and a time from the list of available appointment times. Available appointment times will display in green. If the OCME is not accepting pick-ups or has a full schedule on a date, no times will appear, and you must select another date with available times. Click Next.
- Your date/time slot is held for 5 minutes. You must confirm the Decedent, and Pick-Up Information is correct. Read the instructions and terms, then select the Agreement check box. Click Submit.
- Your barcode confirmation will display. You may choose to save the confirmation as a PDF. It will also be sent to your email address. Please bring a copy of the confirmation (hard copy, email), along with other listed materials, to your pick-up appointment.
 - If another party is picking up the Decedent, you must forward them a copy of the confirmation (hard copy, email).

Location: Boston
 Organization Name: Benjamin Funeral Home

Decedent Information

OCME # : 2019-99999
 Name : MISSION, CAROLINE
 Address : 98 FELGER AVE, FALL RIVER, MA
 02871
 DOB : 04/19/1969

Pick-Up Date/Time: 01/11/2019 at 2:20PM

Date: 01/11/2019



9:00AM	11:20AM	1:40PM
9:20AM	11:40AM	2:00PM
9:40AM	12:00PM	2:20PM
10:00AM	12:20PM	2:40PM
10:20AM	12:40PM	3:00PM
10:40AM	1:00PM	3:20PM

Confirm Schedule Pick-Up

Your pick-up has been confirmed for Friday, January 11, 2019 at 12:20PM. To modify the date/time, click here. Pick-Up must occur at designated date and time only. You may show up 10 minutes prior to the scheduled time. Pick-Up will be forfeited if you are more than 15 minutes late. A copy of your confirmation has been sent to your email. Please bring with you the following documents:

• Pick-Up Voucher

• Identification

Pick-Up Date/Time: Friday, January 11, 2019 at 12:20PM

Pick Up Details

Pick Up Date	Friday, January 11, 2019
Pick Up Time	12:20PM
Pick Up Location	Boston

Decedent Information

DECEDENT NAME : MISSION, CAROLINE	OCME # : 2019-99999	
NOK Name	NOK Address	NOK Relationship to decedent
CARPENTER, JILLIAN	64 CONVERTIBLE BLVD, OUT OF COUNTRY, OC 00000	Mother



Pick-Up Code: 733655976

VIEW CONFIRMATION/BARCODE FOR EXISTING PICK-UP

If you have already created a pick-up appointment and need to view, download or print the appointment confirmation, please follow the steps below:



- Select Manage Pick-Ups from the navigation bar and click Modify Existing Pick-Up from the drop-down.
- Search by Decedent Name, Barcode ID, OCME # or Date and click Search.
- A list of all your existing scheduled appointments for pick up will be listed.
- Select View Confirmation from the Action column.
- You can print the confirmation, save it as a PDF, screenshot, etc. You will need this confirmation when you go to the OCME to pick up the decedent.

OCME #	Decedent Name	Scheduled Pick-Up Date/Time	Barcode ID	Action
2019-99999	CAROLINE MISSION	01/11/2019 2:20PM	733655976	Modify Cancel View Confirmation
3846-82306	KAYLA SMITH	01/10/2019 10:20AM	915904712	Modify Cancel View Confirmation
2018-99999	UMBERTO FREITAS	12/24/2018 1:00PM	635775198	Modify Cancel View Confirmation

DECEDENT INFORMATION

DECEDENT NAME : MISSION, CAROLINE	
NOK Name	NOK Address
CARPENTER, JILLIAN	64 CONVERTIBLE BLVD, OUT OF COUNTRY, OC 00000

733655976
Pick-Up Code: 733655976

Print **Save as PDF** **Close**

MODIFY EXISTING PICK-UP

If you need to modify an existing pick-up appointment, you may change the date or time to another availability. While the OCME understands traffic and other factors that may cause you to be late, you must understand that if you are more than 15 minutes late, they may move on to the release of the next scheduled pick-up. If you know you are unable to make it to your scheduled pick up time, you can modify your appointment time and reschedule to avoid wait times. To change the time of your scheduled pick up, please follow the steps below:



OCME #	Decedent Name	Scheduled Pick-Up Date/Time	Barcode ID	Action
2019-99999	CAROLINE MISSION	01/11/2019 2:20PM	733655976	Modify Cancel View Confirmation
3846-82306	KAYLA SMITH	01/10/2019 10:20AM	915904712	Modify Cancel View Confirmation
2018-99999	UMBERTO FREITAS	12/24/2018 1:00PM	635775198	Modify Cancel View Confirmation

- Select Manage Pick-Ups from the navigation bar and click Modify Existing Pick-Up from the drop-down.
- Search by Decedent Name, Barcode ID, OCME # or Date and click Search.
- A list of all your existing scheduled appointments for pick up will be listed.
- Select Modify from the Action column.
- View the Decedent Information is correct, then click Next.
- Select a new date/time from the calendar (preferably within 72 hours) from the list of available appointment times. Available appointment times will display in green. Click Next.
 - If the OCME is not accepting pick-ups or has a full schedule on a date, no times will appear, and you must select another date with available times.
- Your date/time slot is held for 5 minutes. You must confirm the Decedent, and Pick-Up Information is correct. Read the instructions and terms, then select the Agreement check box. Click Submit.
- Your barcode confirmation will display. You may choose to save the confirmation as a PDF. It will also be sent to your email address. Please bring a copy of the confirmation (hard copy, email), along with other listed materials, to your pick-up appointment.
 - If another party is picking up the Decedent, you must forward them a copy of the confirmation (hard copy, email).

CANCEL EXISTING PICK-UP

If you need to cancel an existing pick-up appointment, you can do so through Manage Pick Ups. When you cancel your pick-up time, the timeslot is removed from the system and you must recreate the appointment by going to Schedule New Pick-Up.

OCME #	Decedent Name	Scheduled Pick-Up Date/Time	Barcode ID	Action
2019-99999	CAROLINE MISSION	01/11/2019 2:20PM	733655976	Modify Cancel View Confirmation
3846-82306	KAYLA SMITH	01/10/2019 10:20AM	915904712	Modify Cancel View Confirmation
2018-99999	UMBERTO FREITAS	12/24/2018 1:00PM	635775198	Modify Cancel View Confirmation

- Select Manage Pick-Ups from the navigation bar, and click Edit Existing Pick-Up from the drop-down.
- Search by Decedent Name, Barcode ID, OCME # or Date and click Search.
- A list of all your existing scheduled appointments for pick up will be listed.
- Select Cancel from the Action column.
- Review the information to ensure this is the appointment you wish to cancel. Select Cancel Pick-Up and select Yes from the pop-up.
- Your scheduled pick-up is removed from the system. You must reschedule as soon as possible.

LIVERY SERVICE REQUESTS (PORTAL-REGISTERED LIVERY SERVICES)

FUNERAL HOMES - MANAGE YOUR OUTGOING LIVERY SERVICE REQUESTS

The pending requests page is for when you have requested a portal-registered livery service to complete the pick-up for you. If your funeral home offers livery services, you will see incoming requests to accept or reject. If you select to use a registered livery service for your pick-up, the status of your requested decedent pick-up will display.



OUTGOING PENDING PICK-UP REQUESTS

Outgoing requests are requests sent to portal-registered livery services asking that they complete a pick-up service for you. If the livery service does not accept, reject, or contact you within a reasonable amount of time to prepare for planning, you should contact the livery service. To modify the date and time of a request, change the livery company or cancel a request to a livery service, please follow the steps below.

Modify Pick-Up Request

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the drop-down.
- Scroll to the Outgoing Pending Pick-Up Requests section.
- Click Modify in the Action column of the request you wish to change.
- Select Yes from the pop up asking if you wish to modify the request.
- Modify the Livery Service, requested date/time of delivery, and/or add comments and select Update.
- The updated request will be sent to the livery service.

Cancel Pick-Up Request

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the drop-down.
- Scroll to the Outgoing Pending Pick-Up Requests section.
- Click Cancel in the Action column of the request you wish to change.
- Click Yes from the pop up asking if you want to cancel the request to the livery service.
- The pick-up request to the livery service is cancelled. You must Schedule New Pick-Up to create a pick-up of the decedent from the OCME.

Outgoing Pending Pick-Up Requests

Outgoing requests have not yet been reviewed by the livery service.

Please contact the livery service if they do not respond to request within a reasonable amount of time to allow for planning.

Show 10 entries

Search:

Livery Service Name	OCME #	Decedent Name	Requested Delivery Date/Time	Action
Benjamin Livery Service	1321-4324	BROOKE DRAFTTEST		Modify Cancel
Benjamin Livery Service	2018-31111	MARLENE PANERA	12/20/2018 7:00AM	Modify Cancel

VIEW ACCEPTED PICK-UP REQUESTS

Accepted requests indicate that the livery service has seen the request and agreed to schedule the pick-up from the OCME.

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the dropdown.
- Scroll to the Accepted Pick-Up Requests section.
- View the livery service, decedent name, requested delivery date/time, and the scheduled pick-up time. The Scheduled time will only appear once the livery service has created that pick-up in the system. You will receive a copy of the pick-up confirmation email once it is scheduled.

Please note: if you do not see a scheduled pick-up time within a reasonable amount of time, please contact the livery service by phone to make sure arrangements are being made.

Accepted Pick-Up Requests

Accepted requests indicate the livery service has agreed to schedule and complete the pick up/delivery services.

Livery Service Name	OCME #	Decedent Name	Requested Delivery Date/Time	Scheduled Pick-Up Date/Time	Action
Bristol Livery Service	2018-09281	EDWARD SHEERAN	11/29/2018 12:00AM	12/21/2018 1:20PM	-

REJECTED PICK-UP REQUESTS

A rejected request indicates that the livery service cannot perform the scheduled pick-up and delivery of the decedent. You will need to either re-assign the request to another livery service, or cancel the request and re-schedule it.

Re-Assign Pick-Up to Another Livery Service

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the dropdown.
- Scroll to the Rejected Pick-Up Requests section.
- Click Reassign Pick-Up in the Action column of the pick-up you wish to modify.
- Click Yes in the pop up asking if you wish to modify the livery service, date, and/or time.
- Select a new livery service from the dropdown menu, and update any additional information/add comments. Click Update to send the request to the new livery service.
- The request will be moved to the Outgoing Pending Pick-Up Requests section until the livery service responds.

Cancel a Rejected Pick-Up Request

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the dropdown.
- Scroll to the Rejected Pick-Up Request section.

- Click Cancel in the Action column of the rejected request.
- Click Yes to cancel the request completely. You will need to go to Schedule New Pick-Up to schedule the pick-up yourself or send it to another livery service.

Rejected Pick-Up Requests

Rejected requests indicate the livery service cannot perform the scheduled pick up.
Please reassign the livery request or schedule your own pick up.

Livery Service Name	OCME #	Decedent Name	Requested Delivery Date/Time	Scheduled Pick-Up Date/Time	Action
Bristol Livery Service	2018-9898	Shannon Smith			Reassign Pick-Up

LIVERY SERVICES – MANAGE YOUR INCOMING PICK-UP REQUESTS

For livery service organizations, or funeral homes also offering livery services, you may receive requests through the portal. You will receive email notifications when a request for your services has been made. You can accept or reject these requests from other funeral homes by following the steps below. Once accepted, you must schedule the pick-up through the portal.

Incoming Pending Pick-Up Requests

Show entries Search:

Funeral Home Name	OCME #	Decedent Name	Requested Delivery Date/Time	Comments	Action
Benjamin Funeral Home	2011-98888	TIMOTHY STEVENS	01/15/2019 10:00AM	Please call when you're on your way with the decedent.	Accept Reject

Showing 1 to 1 of 1 entries Previous Next

ACCEPT INCOMING PENDING PICK-UP REQUESTS

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the drop-down.
- The Incoming Pending Pick-Up Requests will be at the top of the page.
- In the summary, you will view the Funeral Home Name, OCME #, Decedent Name, the requested delivery date/time, along with any comments the funeral home added.
- To accept the request, select Accept from the Action column, and click Yes on the pop-up.
- The funeral home will be notified that you have accepted the request.
- You will be directed to Schedule New Pick-Up page. You can continue through the pick-up process or you may return to this page at a later time. Please follow the steps in Schedule New Pick-Up to complete the pick-up scheduling process.

Incoming Pending Pick-Up Requests

Show entries Search:

Funeral Home Name	OCME #	Decedent Name	Requested Delivery Date/Time	Comments	Action
Benjamin Funeral Home	2011-98888	TIMOTHY STEVENS	01/15/2019 10:00AM	Please call when you're on your way with the decedent.	Accept Reject

Showing 1 to 1 of 1 entries Previous Next

Modify Accepted Pick-Up Request

Once you have accepted a pick-up request, you may need to modify some details or add comments for the funeral home.

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the dropdown.
- Scroll to the Accepted Pick-Up Requests section.
- Click Modify in the Action column of the accepted request you wish to modify.
- Click Yes in the pop up asking if you wish to modify the details.
- Add any comments for the funeral home and click Update. The details will be sent to the funeral home. You must still schedule the pick-up for this decedent.

Accepted Pick-Up Requests					
Accepted requests indicate the livery service has agreed to schedule and complete the pick up/delivery services.					
Livery Service Name	OCME #	Decedent Name	Requested Delivery Date/Time	Scheduled Pick-Up Date/Time	Action
Bristol Livery Service	2018-09281	EDWARD SHEERAN	11/29/2018 12:00AM	12/21/2018 1:20PM	-
Bristol Livery Service	2018-98989	Jimbo Slice	06/13/2018 5:00PM	06/14/2018 10:30AM	-
Bristol Livery Service	2018-9898	Miranda Bailey	06/22/2018 6:00AM	06/21/2018 12:30PM	-
Benjamin Funeral Home	2011-98888	TIMOTHY STEVENS	01/15/2019 10:00AM		Modify Cancel

Cancel Accepted Pick-Up Request

If you need to cancel an accepted pick-up request, please follow the steps below.

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the dropdown.
- Scroll to the Accepted Pick-Up Requests section.
- Click Cancel in the Action column of the accepted request you wish to cancel.
- Click Yes in the pop up to cancel the request and send notification to the funeral home.
- Once you have cancelled the request, it will be removed from your pending requests page.

Accepted Pick-Up Requests					
Accepted requests indicate the livery service has agreed to schedule and complete the pick up/delivery services.					
Livery Service Name	OCME #	Decedent Name	Requested Delivery Date/Time	Scheduled Pick-Up Date/Time	Action
Bristol Livery Service	2018-09281	EDWARD SHEERAN	11/29/2018 12:00AM	12/21/2018 1:20PM	-
Bristol Livery Service	2018-98989	Jimbo Slice	06/13/2018 5:00PM	06/14/2018 10:30AM	-
Bristol Livery Service	2018-9898	Miranda Bailey	06/22/2018 6:00AM	06/21/2018 12:30PM	-
Benjamin Funeral Home	2011-98888	TIMOTHY STEVENS	01/15/2019 10:00AM		Modify Cancel

REJECT INCOMING PICK-UP REQUEST

If you cannot perform the pick-up/delivery services for a requested pick-up, you should reject the request as soon as possible to allow the funeral home time for making alternative arrangements.

- Select Manage Pick-Ups from the navigation bar, and click Pending Requests from the drop-down.
- The Incoming Pending Pick-Up Requests will be at the top of the page.
- In the summary, you will view the Funeral Home Name, OCME #, Decedent Name, the requested delivery date/time, along with any comments the funeral home added.
- To reject the request, select Reject from the Action column, and click Yes on the pop-up. Add any comments or reasons for the rejection if necessary.
- Click Submit. The funeral home will be notified that you have rejected the request. The request will be removed from your Pending Requests page.

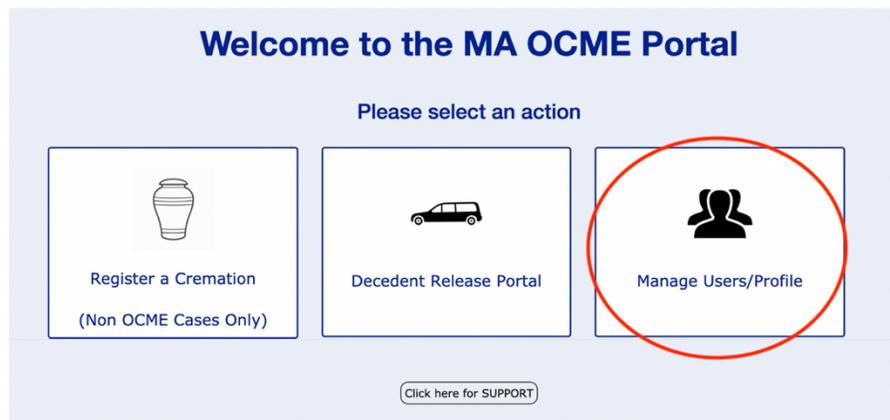
Incoming Pending Pick-Up Requests					
Show 10 entries					Search:
Funeral Home Name	OCME #	Decedent Name	Requested Delivery Date/Time	Comments	Action
Benjamin Funeral Home	2011-98888	TIMOTHY STEVENS	01/15/2019 10:00AM	Please call when you're on your way with the decedent.	Accept Reject

Showing 1 to 1 of 1 entries

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USER MANAGEMENT MODULE

On the Main Menu, click the Manage Users/Profile button.



CREATE NEW USER

Funeral Home and Livery Service organizations may have multiple users. Each user has access to all applications created/sent to that organization. If one person starts an application but saves the draft without having time to finish, another user with the organization can sign in and pick up where the other person left off, without having to start a new application. Your organization may have multiple locations tied to the single account, and all users will have access to all locations, without having to have multiple user accounts.

To create a new user for your organization, follow the steps below.

- Select Manage Users from the navigation bar, and click Create New User from the drop-down.
- Click Create User.
- Enter the user's First Name, Last Name, Username, Email Address, Phone Number. Select if the user is a Funeral Home Admin or User from the User Type drop-down.
 - Funeral Home Admins have permission to create/manage users and manage the funeral home profile (additional locations, update Director's license, etc.)
 - A Funeral Home Users have permissions only to create/manage applications and create/manage pick-ups.
- Click Create User.
- The new user will receive an email with their username and a temporary password.

MODIFY EXISTING USER

Name	User Name	Phone Number	User Type	Status	Action
Brooke Benjamin	bbenjaminFH		Funeral Home Admin	Active	Edit Reset Password
Brooke Benjamin	bbenjamin	(888) 908-9080	Funeral Home Admin	Active	Edit Reset Password
Lyon Smith	lyonsmith		Funeral Home Admin	Active	Edit Reset Password

To update a user's contact information, reset their password, or deactivate/reactivate their account, follow the steps below.

- Select Manage Users from the navigation bar, and click Edit Existing User from the drop-down.
- Click Modify User.
- If you need to filter the results below, search by the user's First Name, Last Name, Username, User Type, or Status, then click Search User.
- In the search results, find the user to be edited. Select Edit from the Action column.
- Edit the user's information (username cannot be changed) and click Update User.
- To Deactivate a user, change the User Status to 'Inactive.' Now, if this user tries to log in, they will no longer have access. You can reactivate them at any time to allow access to the portal again.

RESET USER'S PASSWORD

- Select Manage Users from the navigation bar, and click Edit Existing User from the drop-down.
- Click Modify User.
- If you need to filter the results below, search by the user's First Name, Last Name, Username, User Type, or Status, then click Search User.
- In the search results, find the user who needs a password reset. Select Reset Password from the Action column.
- The user will receive an email with a temporary password.

MANAGE FUNERAL HOME PROFILE

- Click Funeral Home Profile from the navigation bar.
- On the Funeral Home Profile page, update the Funeral Home name, contact information, Establishment License Number.
- Update yearly the Funeral Directors License Expirations and upload a picture of the Funeral Directors License. You can use the delete icon in the Action column to delete the outdated Funeral Directors License.
- To add an additional location, click 'Add Additional Location' button.
 - Add the location information.
- Click Update to save the information.

Update Funeral Home Profile

Primary Organization Name* Benjamin Funeral Home	Street Address* 123 Fake Street	City Taunton
State* Massachusetts	Zip Code* 02780	Phone Number (508) 823-3333 x Extension
Organization Email Address benjaminfuneral@email.com	Website Website	Establishment License* 123456
Funeral Home Director License Expiration* 10/31/2019	Does this funeral home offer livery service?* <input type="radio"/> Yes <input checked="" type="radio"/> No	
Upload Funeral Home Director License* Upload License		

File Name	Action
Brooke FH License	 

benjaminfuneral@email.com Website 123456

Close

Add Additional Location

Organization Name* Organization Name	Street Address* Street Address	City* City
State* Massachusetts	Zip Code* Zip Code	Phone Number* Phone Number x Extension
Email Address Email Address	Website Website	Establishment License* Establishment License
Does this funeral home offer livery service? <input type="radio"/> Yes <input checked="" type="radio"/> No		
<input type="button" value="Add"/> <input type="button" value="Cancel"/>		

CHANGE PASSWORD

- On the top right corner of the navigation bar, select the arrow next to your username.
- On the dropdown menu, click Change Password.
- Enter the old password, create a new password, confirm the new password, and click Update.



UPDATE PROFILE

1. On the top right corner of the navigation bar, select the arrow next to your username.
2. Click Update Profile on the menu.
3. Modify your name, email address or phone number, and click Update Profile.



SUPPORT

- On the Main Menu, click the Support button.



- We have included a link to this quick reference guide. This guide will walk you through each step of the different functions within the portal, as well as a training video. Click the link to view/watch.
- To reach out to our support staff with any questions or concerns, fill out the form with as much information as you can. A member of the Stonewall Support Staff will reach out to you for any portal related issues/questions, or we will direct you to reach out to a member of the OCME.

Release Portal Support Phone: 401-475-9776

Release Portal Support Email: support@stonewallsolutions.com