

Welcome!



## **County Vital Records Death Record Amendments**

Public Health Division  
Center for Public Health Practice  
Center for Health Statistics

September 2014

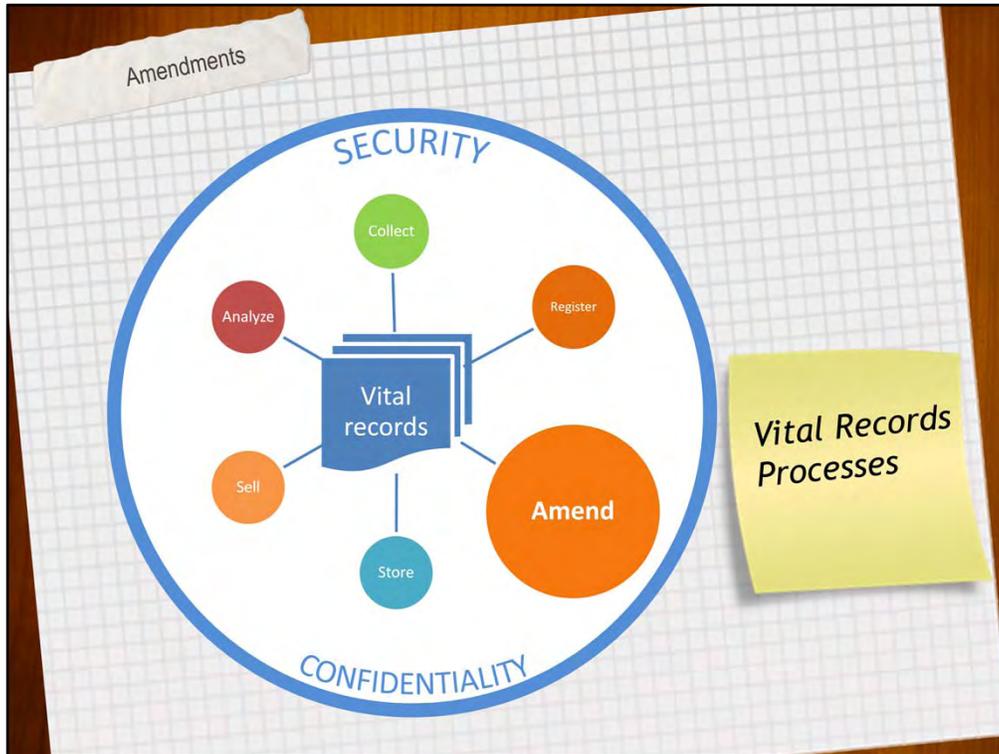


Amendments

**Carol Sanders**  
State Amendment Manager

Today's  
Presenter



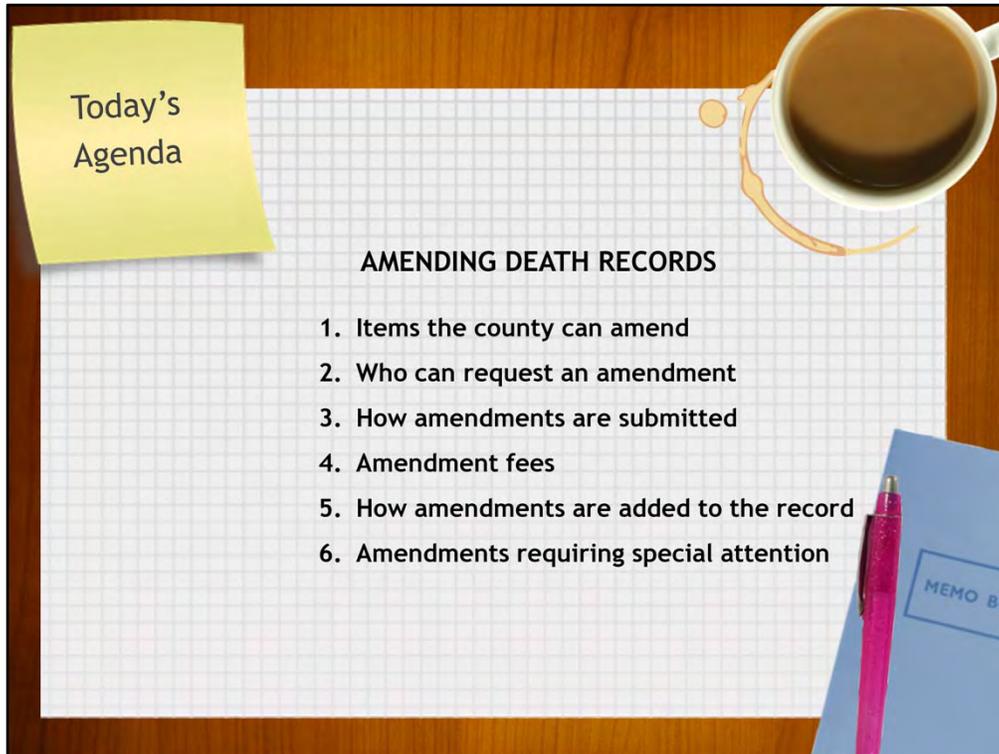


You have seen this Vital Records wheel in the previous webinars. Our first webinar provided an overview of vital records and the new law.

Our second one covered Registration of records.

Today we are doing the first in a two –part series on Amendments – starting with death records. We split the training sessions into two parts when we realized we could not cover both birth and death amendments in one hour. We will do another training session on birth amendments later this year.

To make sure we are all on the same page, we are defining amendments as any change to death records after they are signed and submitted for registration.



In our discussion of death amendments we will cover:

1. Items the county can amend
2. Who can request an amendment
3. How amendments are submitted
4. Amendment fees
5. How amendments are added to the record, and
6. Amendments that require special attention

For those of you who have lots of experience with amendments we will review information that you already know. But I hope that this material will be useful to you in the future if you need to train more staff in your county.

As we go through the presentation I will stop for questions and also to summarize tasks that the county offices are responsible for completing.

Death records

County **can** amend:  
 ✓ Personal info.  
 ✓ Demographic info.

TYPE OR FORM NO. OREGON DEPARTMENT OF HUMAN SERVICES  
 CENTER FOR HEALTH STATISTICS  
**CERTIFICATE OF DEATH** 136-  
 STATE FILE NUMBER

PERMANENT 246521  
 BACK INK 03 961003

1. Legal Name: Anna Harrison  
 2. Date of Birth: Jul-12-2011  
 3. Sex: M  
 4. Age: 1  
 5. Under 1 Year: None  
 6. Under 1 Day: None  
 7. Social Security Number: 123-45-7898  
 8. County of Death: Multnomah  
 9. Decedent's Education: None  
 10. Decedent's Occupation: Unemployed  
 11. Decedent's Race: White  
 12. Voted Decedent Ever in U.S. Armed Forces: No  
 13. Date of Death: 12-12-12  
 14. City/Town: Portland  
 15. State of Oregon County: Clatsop  
 16. Zip Code + 4: 97114  
 17. Inmate City Limits: No  
 18. Spouse's Name: None  
 19. Spouse's Home: None  
 20. Kind of Business/Industry: None  
 21. Usual Residence: Home  
 22. Address of Birth: None  
 23. Address of Decedent: 1200 NE Johnson St., #12 Portland, OR 97114  
 24. Facility Name: Heritage Memorial Hospital - Emergency Room  
 25. Facility Address: 123 N. Lincoln St. Portland, OR  
 26. Facility Phone: 503-123-4567  
 27. Facility Type: Hospital  
 28. Facility License Number: CO-1234  
 29. Name and Complete Address of Funeral Facility: 123 N. Oak St. Portland, OR 97444  
 30. Funeral Director's Signature: [Signature]  
 31. Date Received: 12/12/12  
 32. Local File Number: 45-2-06706

45. Record Amendment: None

46. Cause of Death: [Handwritten: 2-100 p 201]

47. Medical Examiner: [Handwritten: M.D. 12345]

48. Medical Certificate: [Handwritten: 12345]

49. Signature: [Signature]

50. Date: [Handwritten: 12/12/12]

So first - What items can be amended by the County Vital Records office?

County offices can amend personal information and demographic information.

Death records

County **does not** amend:

- ✓ Medical section
- ✓ Date of death

OREGON DEPARTMENT OF HUMAN SERVICES  
CENTER FOR HEALTH STATISTICS  
CERTIFICATE OF DEATH

1. Legal Name: Anna Harrison  
2. Sex: M  
3. Age: 71  
4. Under 1 Year: 12/12/12  
5. Social Security Number: 123-45-7898  
6. County of Death: Multnomah  
7. Date of Death: 12/12/12  
8. Occupation: Nurse  
9. Date of Birth: 12/12/12  
10. Race: White  
11. Marital Status: Widowed  
12. U.S. Armed Forces: No  
13. Place of Birth: Portland, Oregon  
14. Date of Death: 12/12/12  
15. State of Death: Oregon  
16. City/Town/Village: Portland  
17. ZIP Code: 97114  
18. Inmate City Limits: No  
19. Cause of Death: Heart Disease  
20. Place of Death: Hospital - Emergency Room  
21. Date of Death: 12/12/12  
22. Kind of Business/Industry: Home  
23. Name and Complete Address of Funeral Home: Heritage Memorial, 123 N. Lincoln St., Portland, OR 97114  
24. Funeral Director's Signature: [Signature]  
25. Date Received: 12/12/12  
26. Local File Number: CO-1234

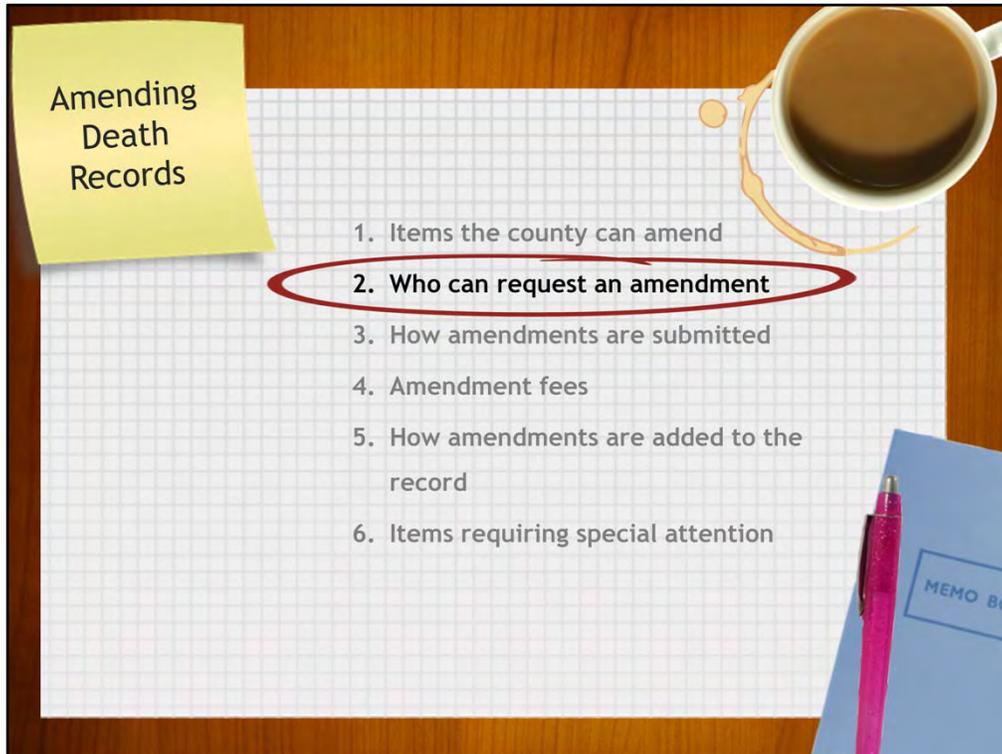
45. Was ever referred to Medical Examiner? No  
46. Were autopsy findings verifiable to complete the cause of death? No  
47. Cause of Death: Heart Disease  
48. Approximate Interval: 2-100 days

49. Nature of Injury: None  
50. Date of Injury: None  
51. Cause of Injury: None  
52. Nature of Injury: None  
53. Date of Injury: None  
54. Cause of Injury: None

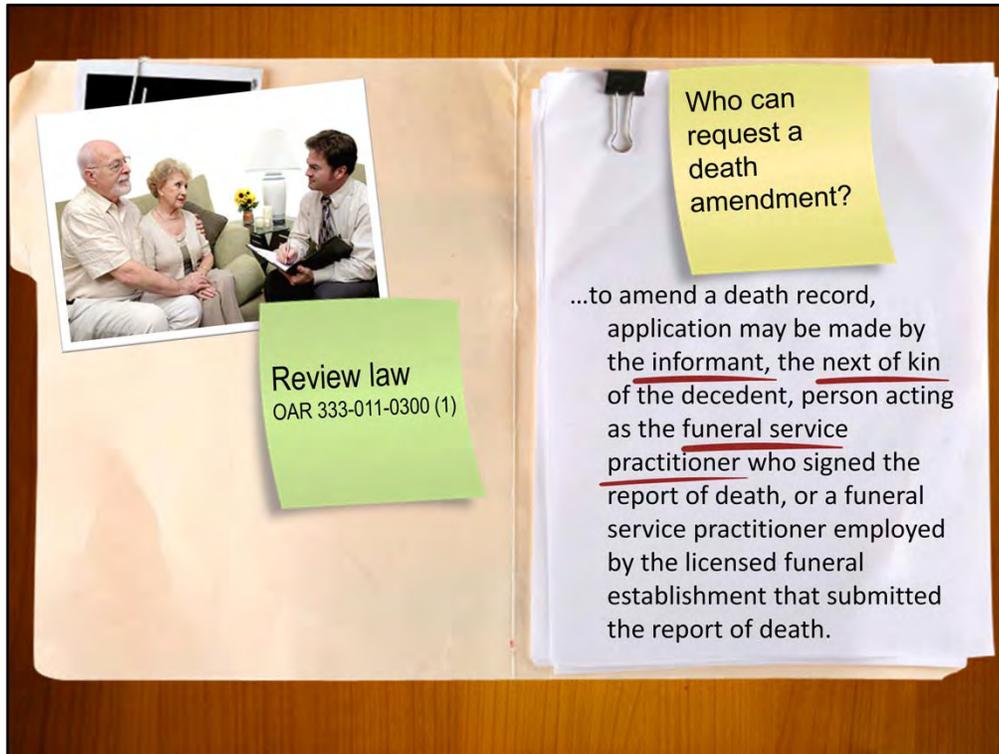
55. Medical Certificate: MD-1234  
56. Medical Certificate: MD-1234  
57. Date of Death: 12/12/12

ORIGINAL - VITAL RECORDS COPY 45-2 (06/06)

Counties do not amend the medical portion of the record or the date of death.



So, who can request an amendment to the personal and demographic section of the death record?



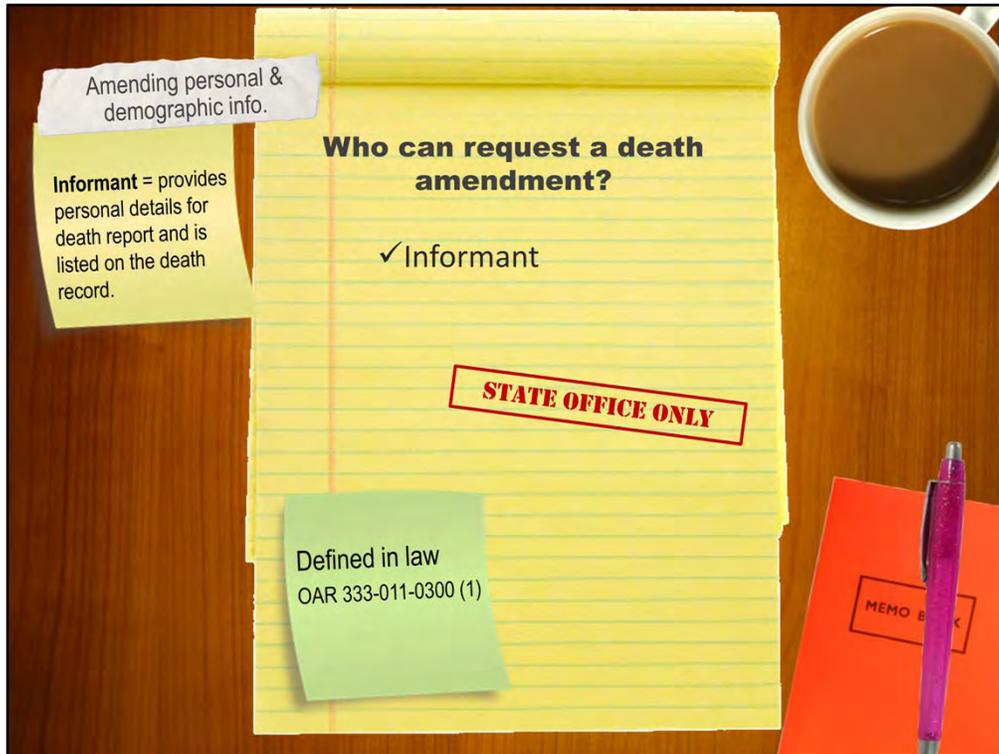
Per Oregon Administrative Rules:

The informant;

The next of kin of the decedent;

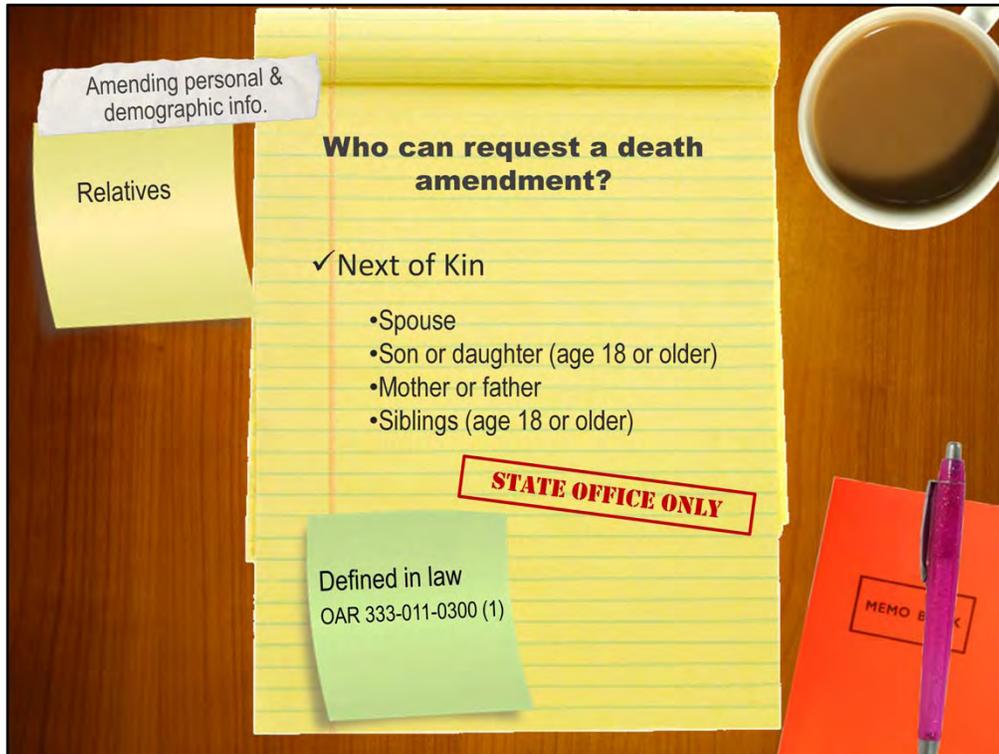
The person acting as the funeral service practitioner who signed the report of death;

Or a funeral service practitioner employed by the funeral home that submitted the death report can request an amendment to the personal and demographic information on the record.



The first category of persons eligible to amend personal information on the death record is the informant.

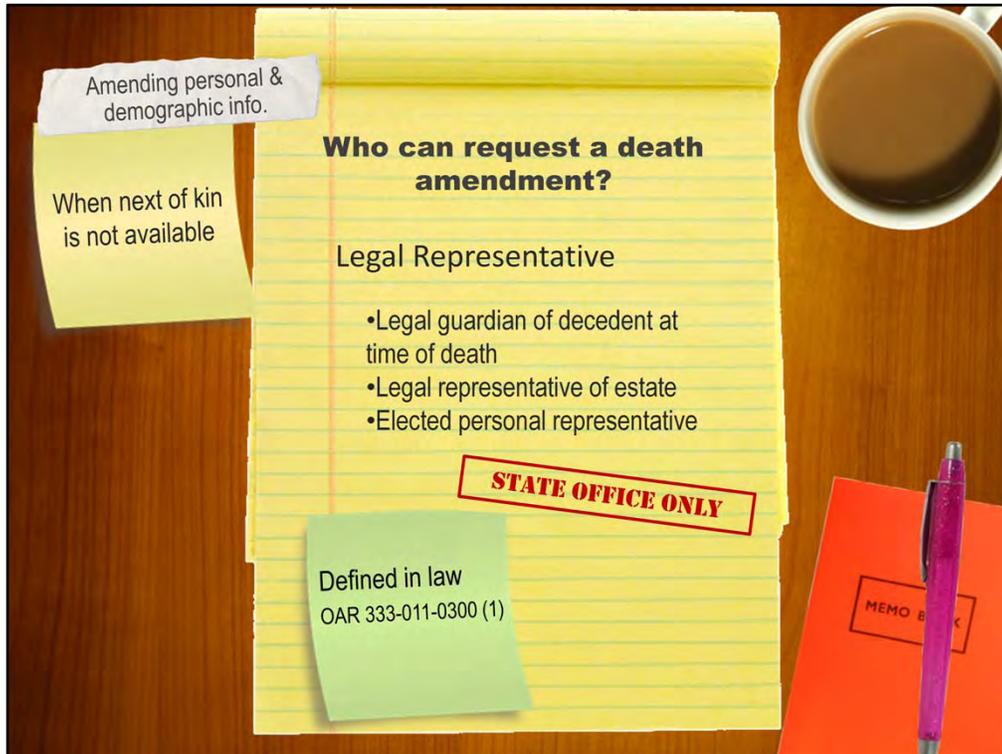
The informant is the person who provides the personal and demographic information about the decedent and is listed as such on the death record.



The second category of individuals who are eligible to amend the personal information are the next of kin.

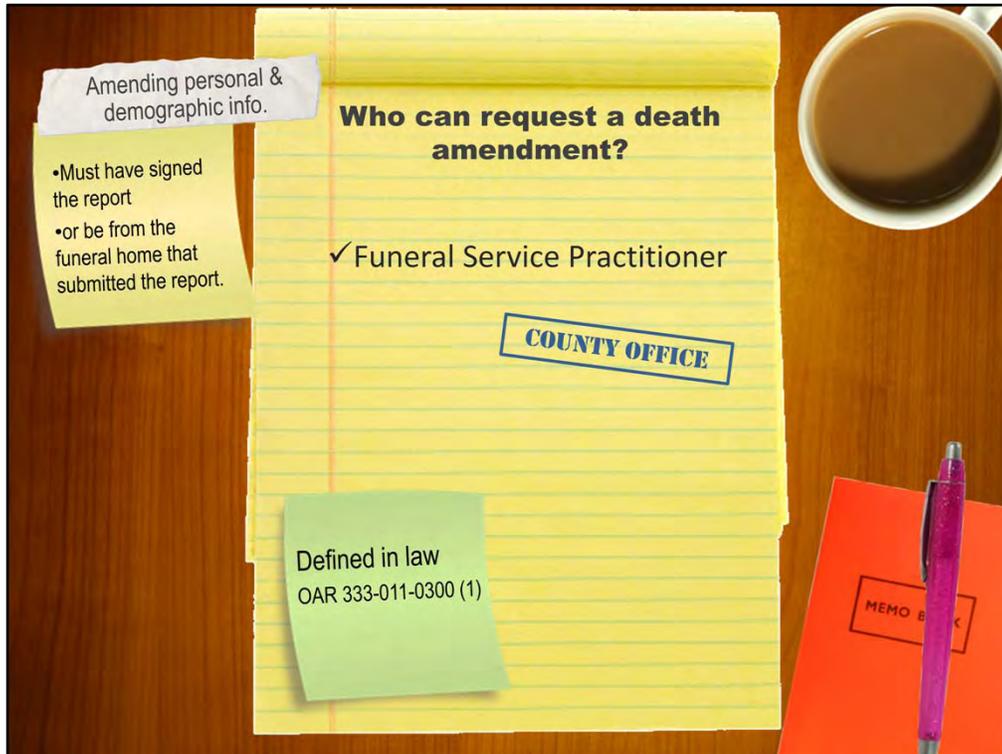
Oregon rules clarify which relatives are considered next of kin in the following order of precedence:

- The spouse,
- The oldest son or daughter, - age 18 or older
- The mother or father,
- Or the oldest sibling, - age 18 or older.



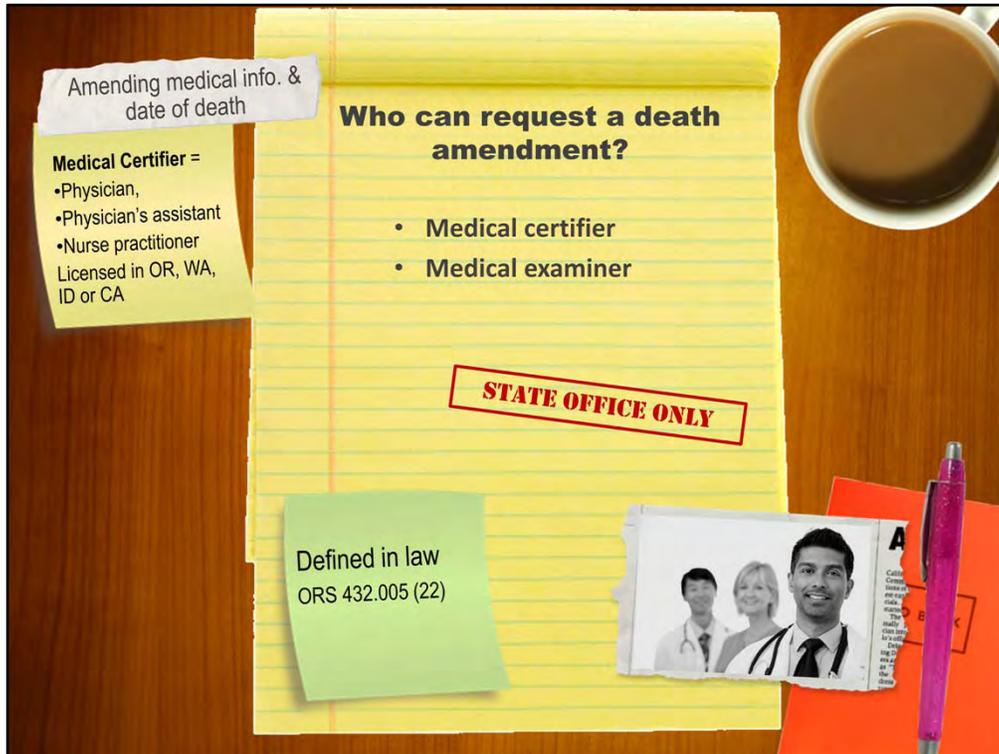
When relatives are not available then amendments may be submitted by legal representatives. The legal representatives can be:

The guardian of the decedent at time of death,  
The legal representative of the estate, or  
The elected personal representative.



The third category of persons eligible to amend the personal section are funeral service practitioners.

When an amendment is submitted by a funeral service practitioner, it must be from the one who signed the death report or one employed by the funeral home that submitted the death report.



Now let's talk about who can amend the medical portion of the death record.

Only the medical certifier who signed the record or a medical examiner can amend the medical portion of the death record.

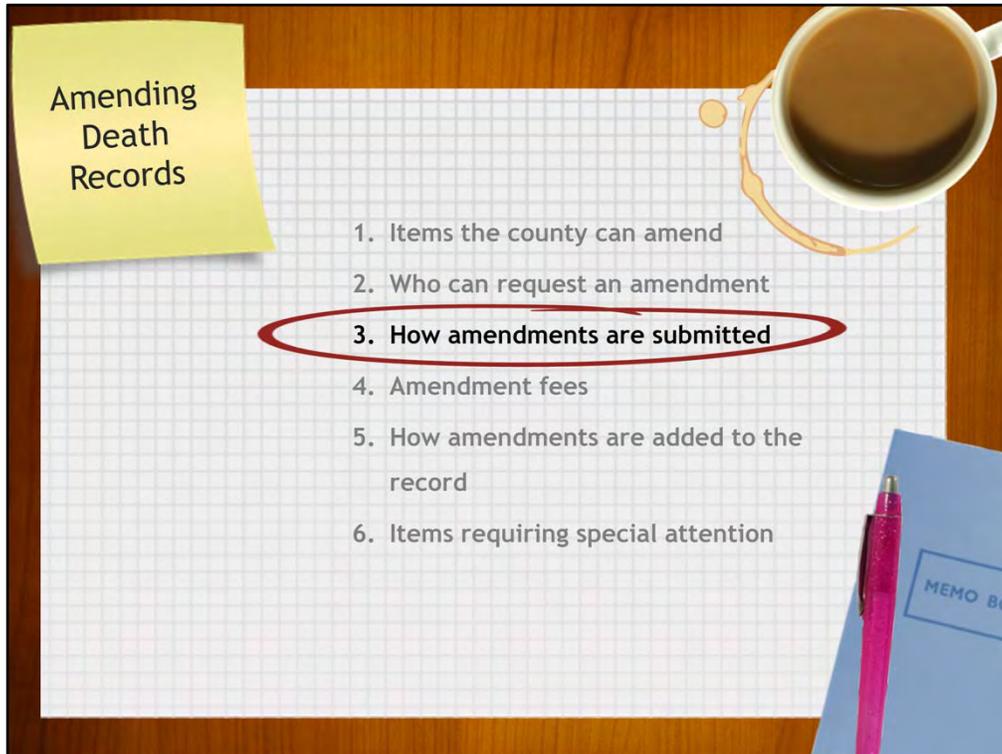
Remember that date of death is considered part of the medical portion of the record.

By law a medical certifier must be:

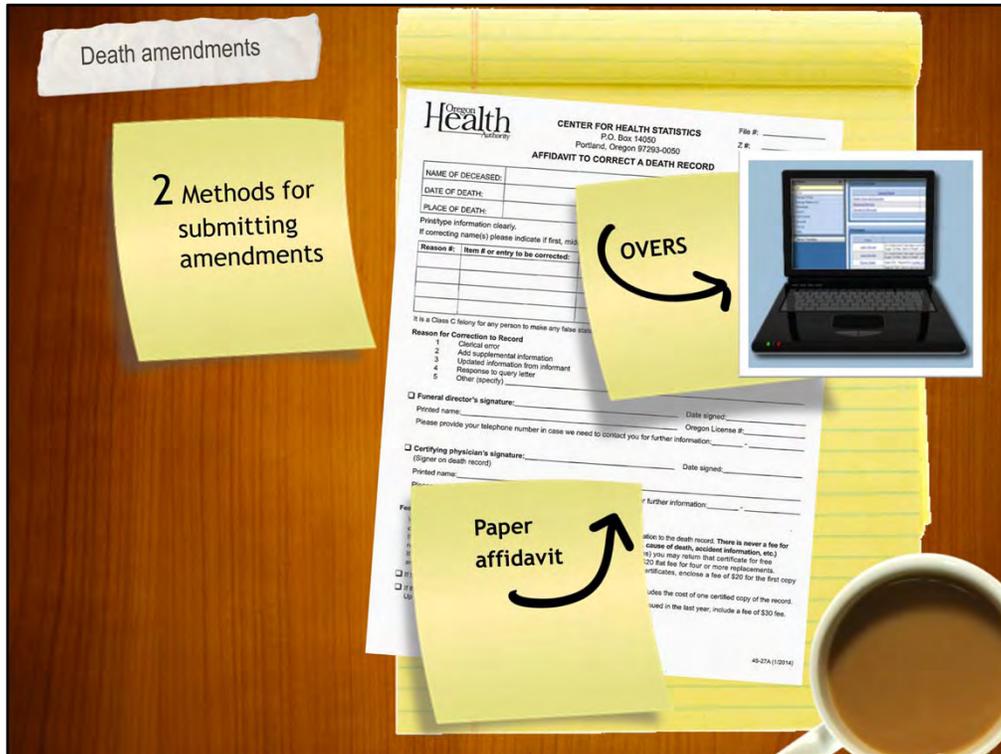
A physician,

A physician assistant

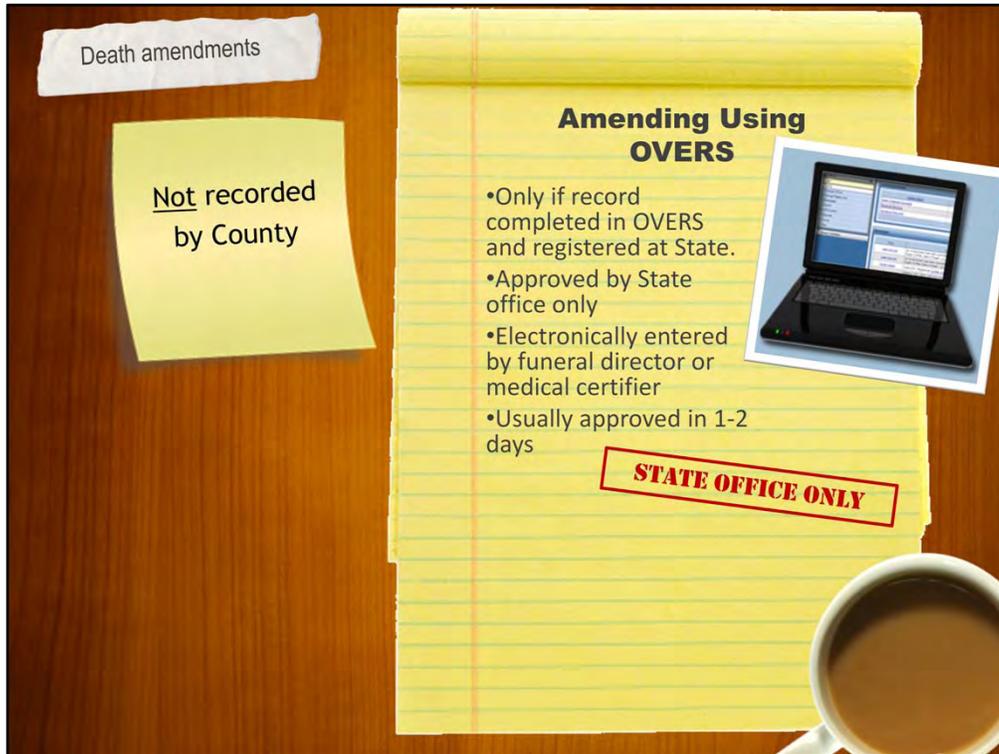
or a nurse practitioner licensed under the laws of Oregon, Washington, Idaho or California who has treated the decedent within 12 months prior to death.



Next – let's cover - How amendments are submitted.

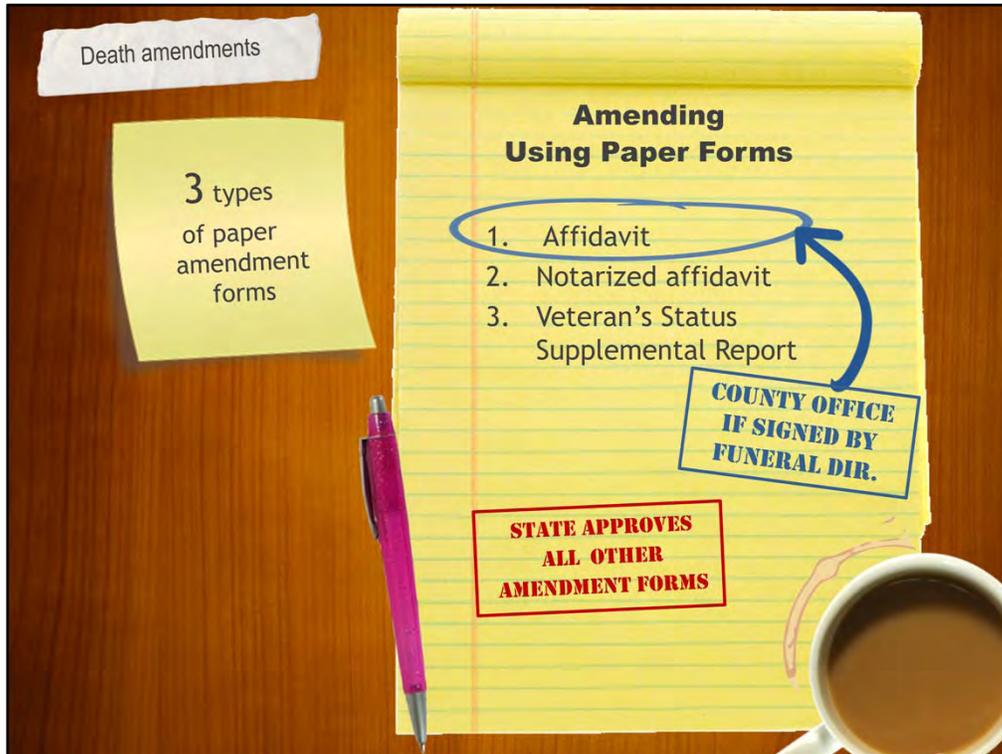


There are two methods for submitting a correction affidavit — electronically through OVERS or with a paper form.



Electronic amendments through OVERS are never recorded by counties.

- An electronic amendment can only be completed in OVERS after the record is registered at the State office.
- And electronic amendments are always approved or rejected by the State.
- Funeral directors can submit electronic amendments if they enter the personal section electronically.
- Medical certifiers can submit amendments electronically if the medical section is entered electronically.
- State vital records staff generally review and approve amendments in 1 to 2 days unless there are questions about the amendment or documentation is required.

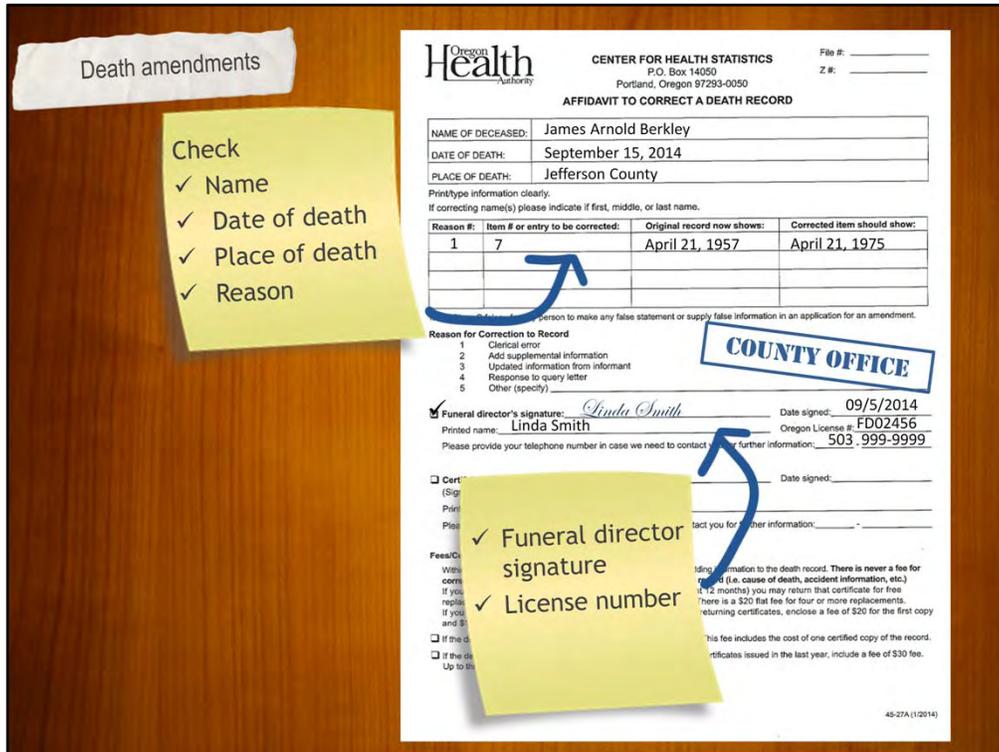


There are three types of paper documents that can be submitted to amend death records:

A signed affidavit,  
A notarized affidavit,  
And a Veteran's Status Supplemental Report.

Only the affidavit signed by a funeral director can be used by County Vital records offices to amend a death record.

The state office reviews and approves all other amendment forms.



Here is a view of the paper affidavit used by funeral directors and medical certifiers.

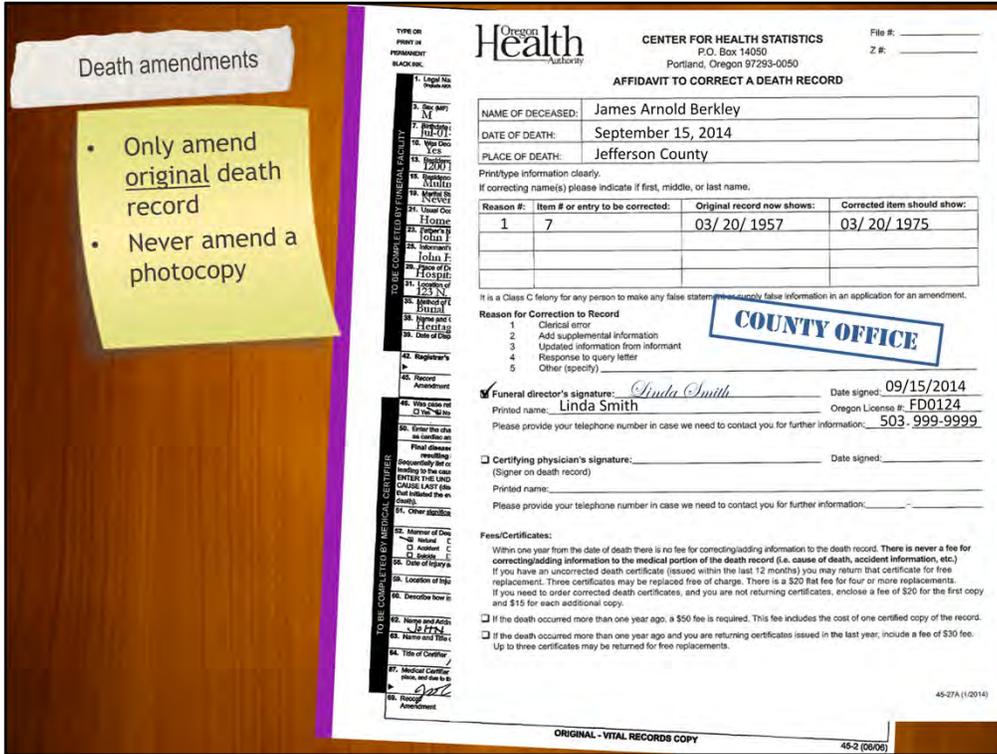
Before amending a record, check that the form is complete, including

- Name of deceased
- Date of death
- Place of death
- and that the items being amended are only personal information from the top portion of the death record.

Also make sure that:

- there is a funeral director signature
- and Oregon license number

The specifics on how to complete an amendment will be covered later in the presentation.

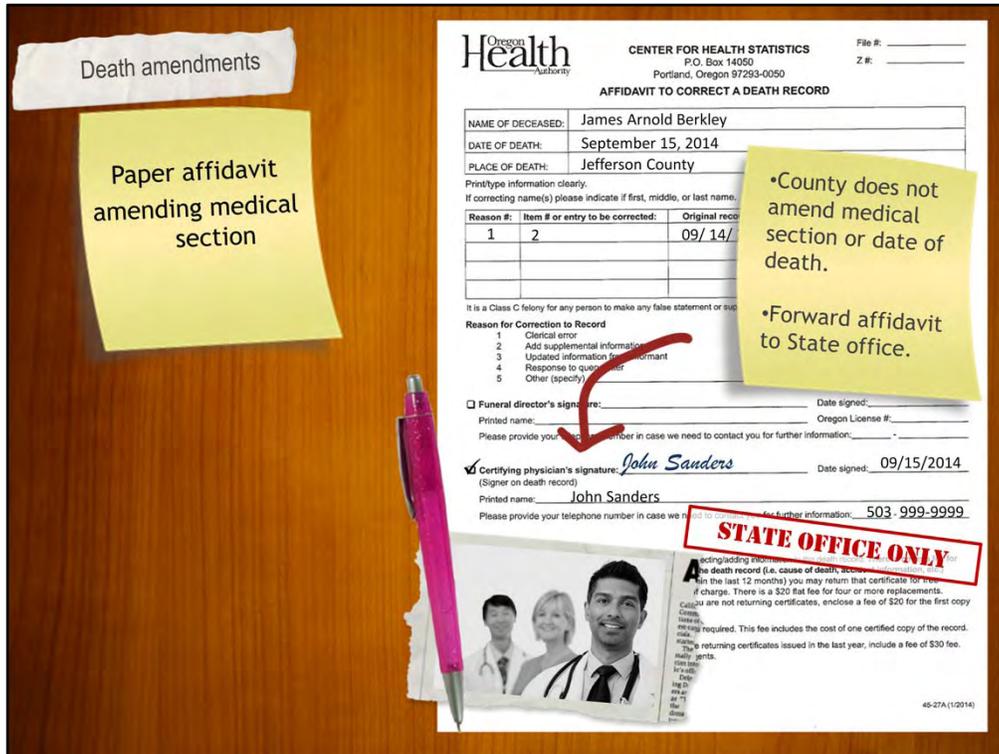


A funeral director may deliver an affidavit to a county with the original paper report or they may fax it to a county after the report is registered.

Only amend while the original death record is at your county office.

Never amend a photocopy.

Once the original death record has been sent to the state, all affidavits are forwarded to the state office for amendment as well.



Paper affidavits amending the medical section may be submitted to the county by the medical certifier.

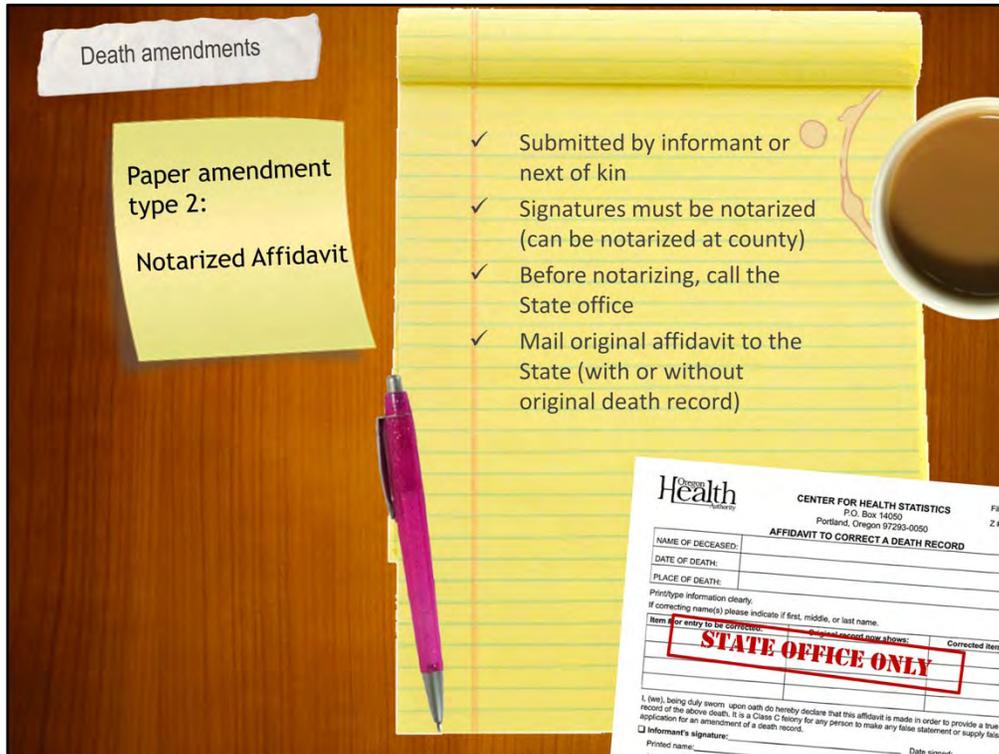
County offices should not amend the medical section or the date of death.

Original affidavits signed by the medical certifier should always be forwarded to the state office.

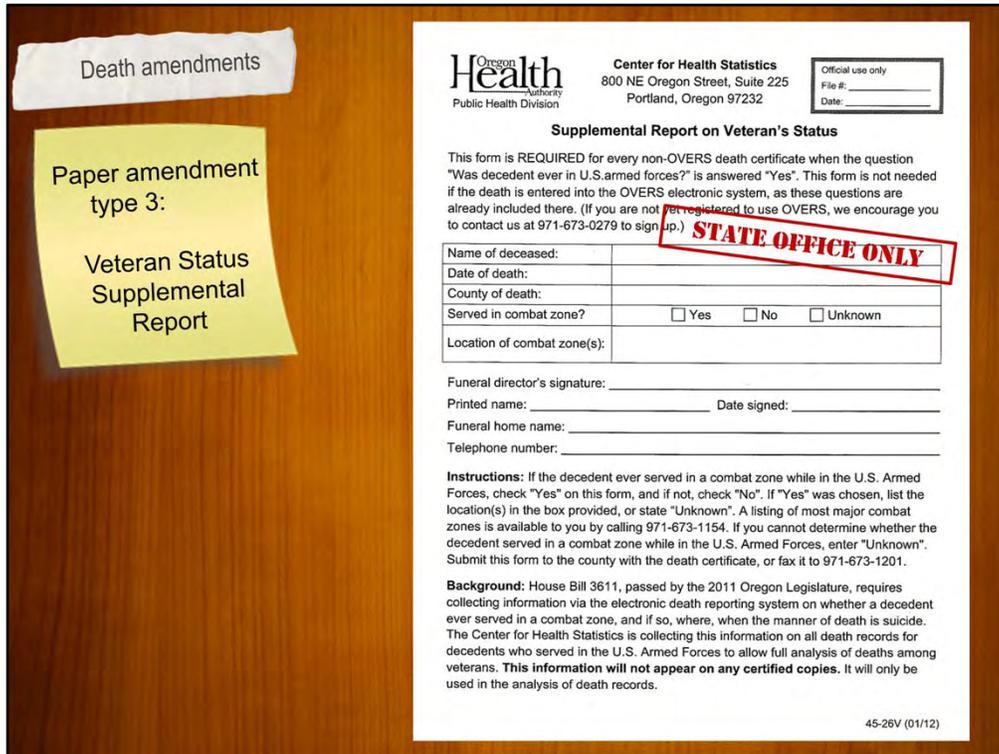


Here is a view of the second type of correction affidavit --a notarized paper affidavit.

It is different from the funeral director/medical certifier affidavit in several ways.

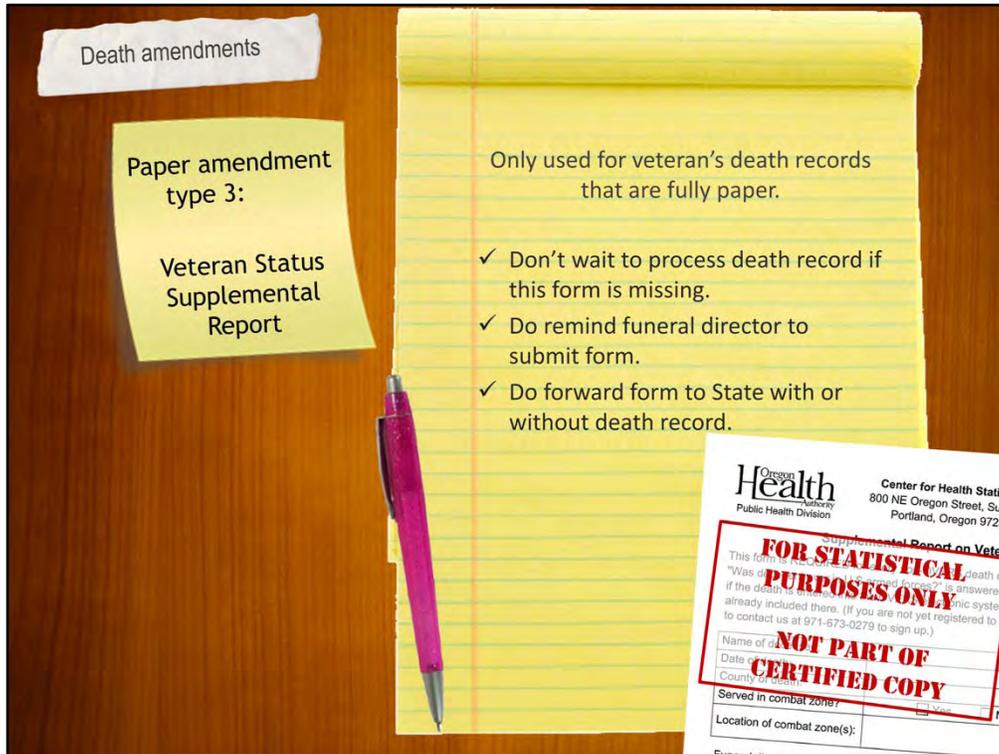


- A notarized affidavit is submitted by either the informant or the next of kin.
- Signatures of the applicant must be notarized;
- County staff may be asked to notarize a signature on this form. Before assisting an applicant, call the State for guidance about whether the amendment can be completed.
- If the State office confirms the amendment can be made, mail the original notarized form to the state office with or without the original death record.



The final paper form you may see is the Supplemental Report on Veteran's status.

Here is a full view of that form.



- The Veteran's Status Supplemental Report is submitted by funeral directors with fully paper records –but only if the decedent is a veteran.

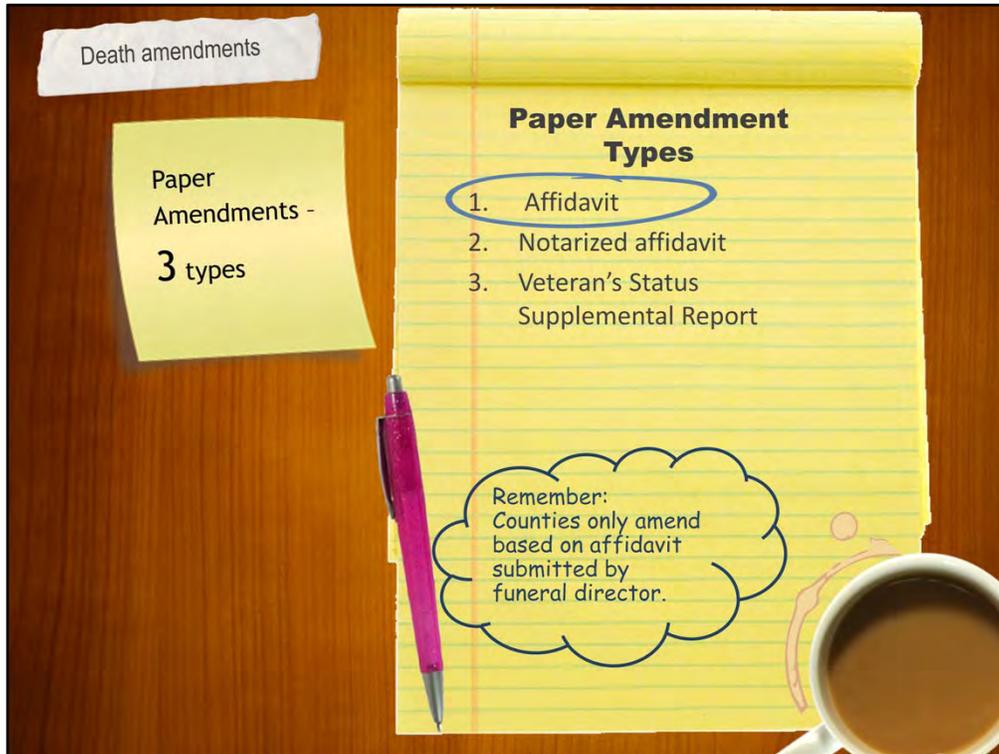
Hybrid and electronic records already include this information.

- DON'T wait until the funeral home provides this form to register a veteran's death record and forward it to the state office.

- Remind the Funeral director that the form is needed when it is missing;

- And forward this form to the state with or without the original death record whenever you receive it.

- The information is used for statistical purposes only. While it is not part of the legal death record -- submitting it is required by law.



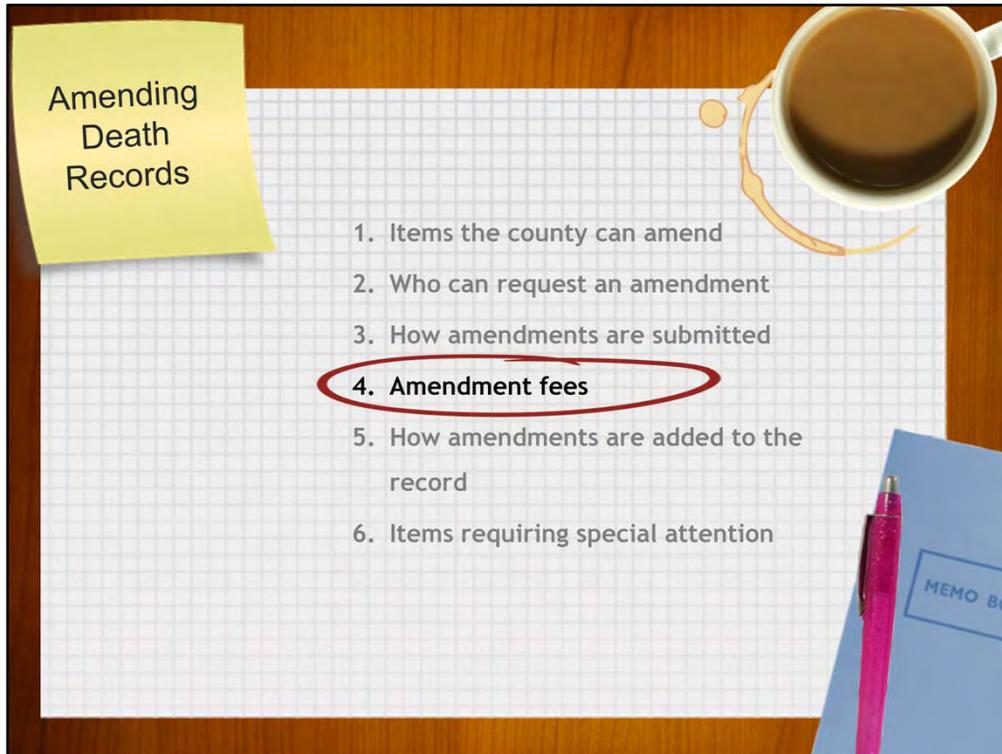
To summarize:

There are three types of affidavits.

1. The paper affidavit submitted by funeral directors and medical certifiers;
2. The notarized paper affidavit that can be submitted directly by the informant or the next of kin;
3. And the Veteran's Status Supplemental Report that is submitted with fully paper death records.

Counties only amend the death record based on the paper affidavit submitted by a funeral director.

All others get forwarded to the state.



Next I want to give you a quick overview of amendment fees.



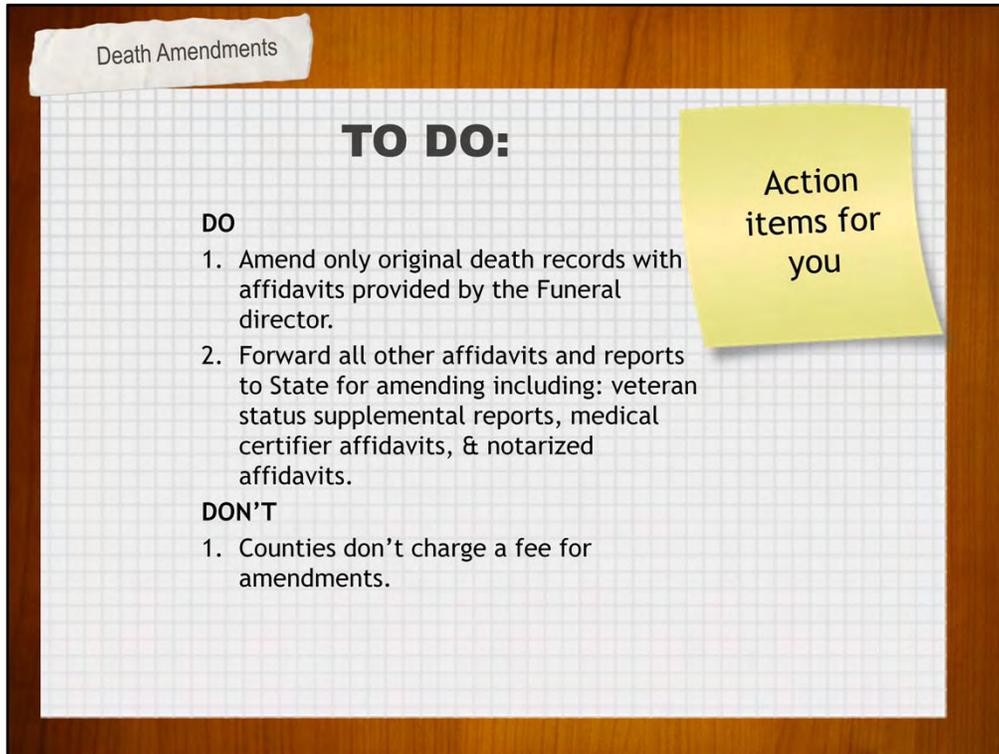
Counties never charge an amendment fee for death amendments.

At the State:

There is no amendment fee for correcting or adding information to a death record in the first year following the date of death.

There is never a fee for amending the cause of death section of the death record – even when it is amended more than one year after date of death.

After one year, there is a \$30 fee for corrections submitted by the funeral director, informant or the next of kin to amend the personal section or demographic section of the death record.



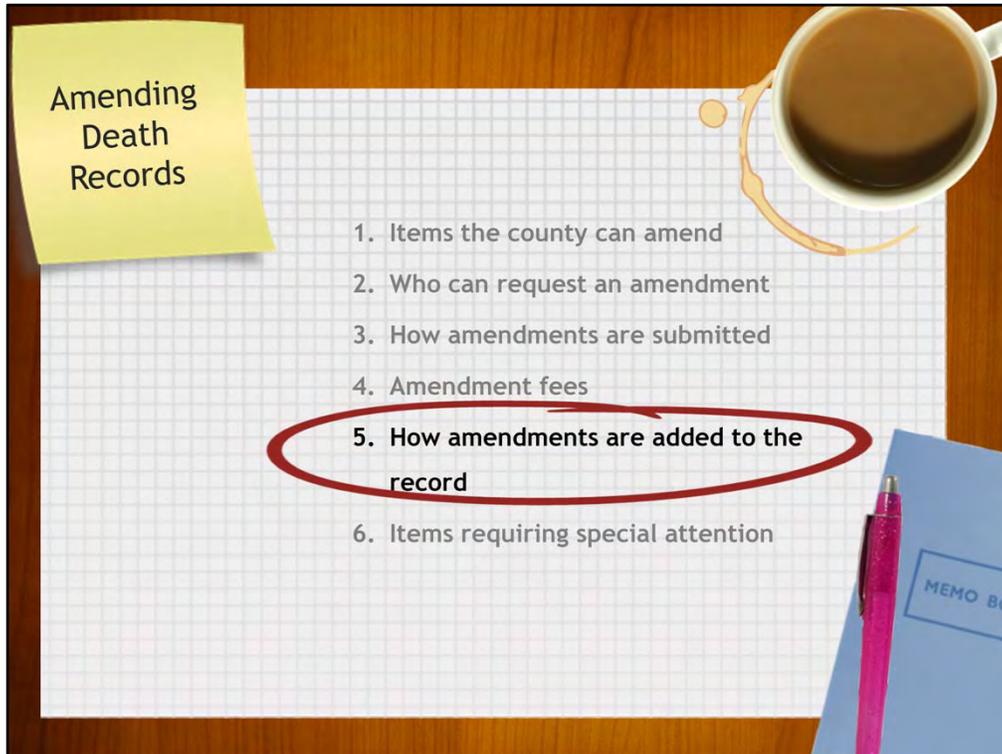
So to summarize what we have been discussing, here is a County Action List:

Amend only original paper death records sent by the funeral director when the original death record is at the county office,

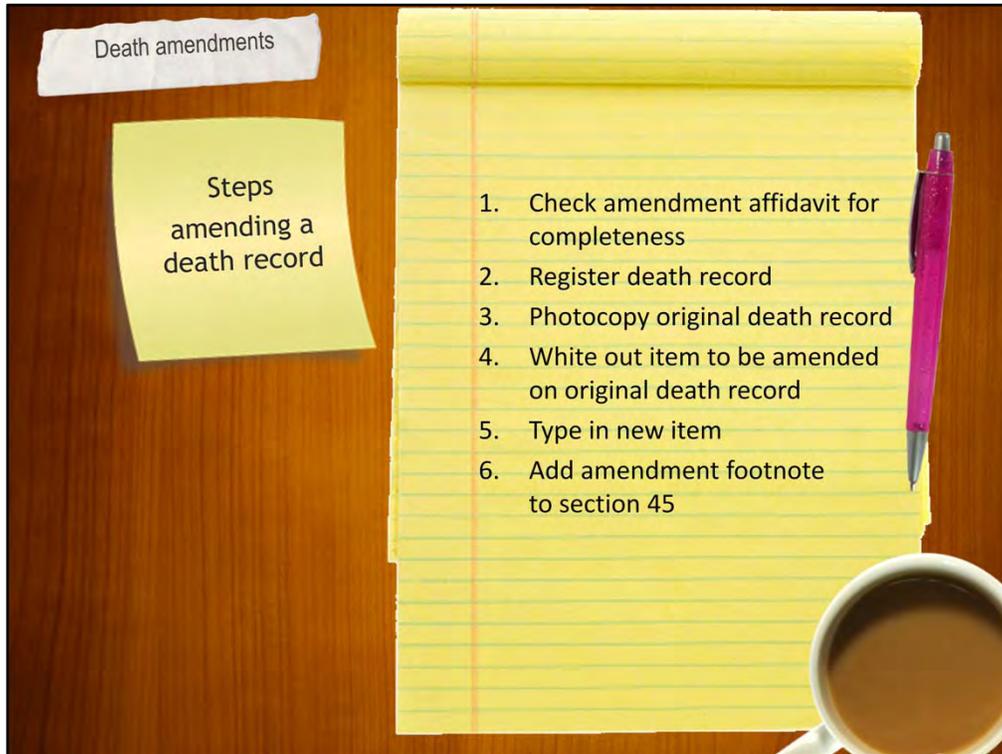
Forward all other affidavits and reports to the state.

These include veteran status supplemental reports, original medical certifier affidavits and notarized affidavits from the informant and next of kin.

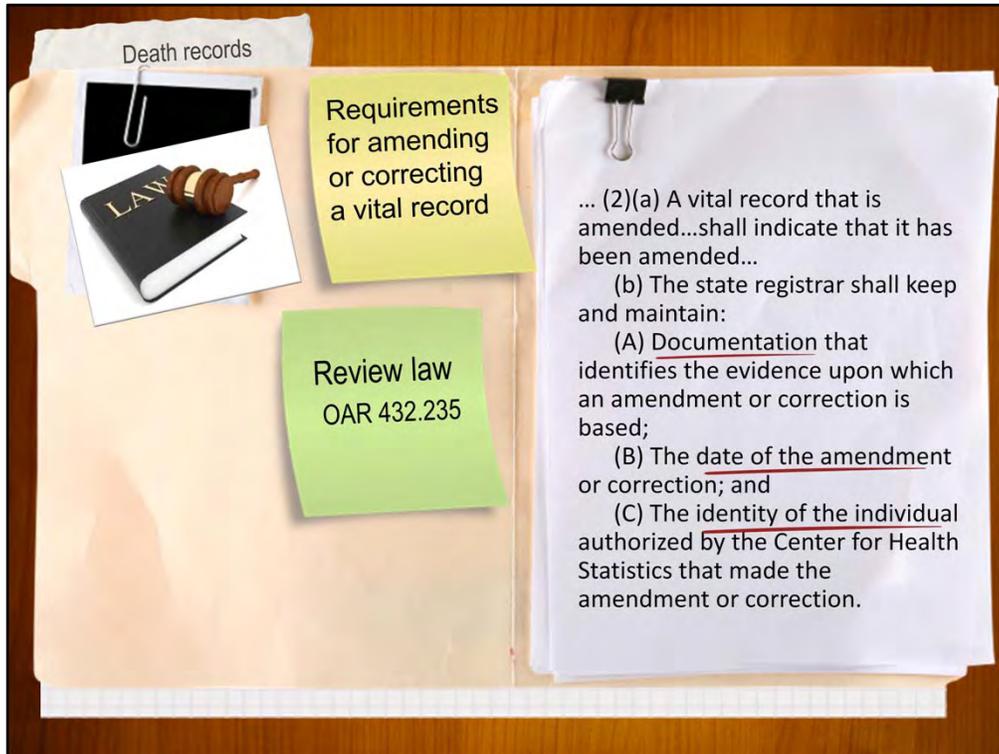
Remember that no fees are charged for amendments in the first year following date of death, so counties never have to charge an amendment fee.



Next we are going to cover how amendments should be made on the death record itself.



- These are the steps to complete the amendment:
- With the death record and affidavit in hand, check the affidavit for completeness.
- Then register the death record if it is not already registered.
- Make a photocopy if you are amending a fully paper death record so you will have the original information;
- White out the item to be amended on the original death record. Remember, all white out on the face of the record must be supported with an affidavit.
- Type in new information for the item;
- Then add the amendment footnote to section 45 of the record.



Oregon administrative rules require that the amendment footnote include:

Information about the document on which the amendment is based,

The date the amendment is completed, and

The identity of the person authorized to make the change to the record.

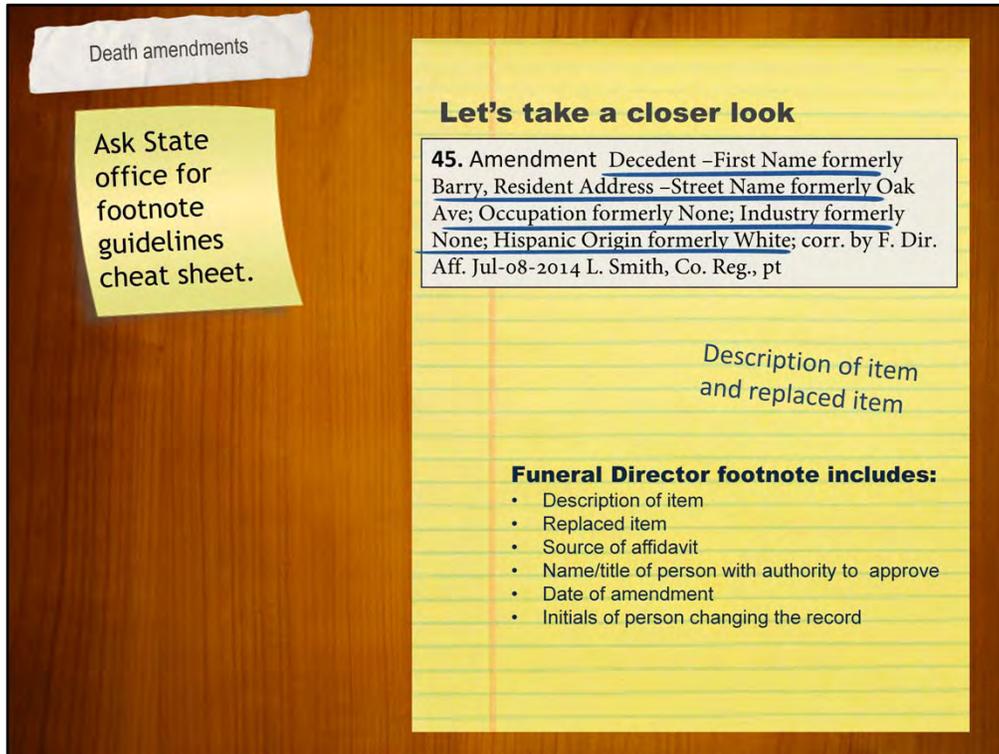
## Amendment Footnote Documentation Standards

OREGON HEALTH AUTHORITY  
CENTER FOR HEALTH STATISTICS  
**CERTIFICATE OF DEATH**

346346  
ID: 100-1000

1. Legal Name First: Harry Middle: Kimble Last: Kimble Suffix: Jr.		2. Death Date July 08, 2014	
3. Sex Male	4. Age (2 hours 0 minutes) None	5. Social Security Number None	6. County of Death Grant
7. Date of Death July 07, 2014	8. Birthplace Portland, Oregon	9. Decedent's Education 8th grade or less	10. Decedent's Religion None
11. Was Decedent a Hispanic Origin? No	12. Decedent's Race(s) White, Native Hawaiian, Black or African American	13. Was Decedent Ever in U.S. Armed Forces? No	14. City/Town
15. Residence - Number and Street 422 Third Avenue	16. State or Foreign Country Oregon	17. ZIP Code + 4 97201	18. Inside City Limits? No
19. Residence - County Clackamas	20. Spouse's Name Prior to First Marriage Never married	21. Usual Occupation Infant	22. Kind of Business/Industry Infant
23. Father's Name Barry Kimble Sr.	24. Mother's Name Prior to First Marriage Amber Jane Valletta	25. Father's Birthdate Not Available	26. Mother's Birthdate 104 Legion Avenue, Portland, OR 97201
27. Practitioner's Name Medical Doctor	28. Facility Name Blue Mountain Hospital	29. Practitioner's License Number Doctor of Medicine	30. City/Town or Location of Death Salem, Oregon
31. Location of Death 170 Ford Road	32. Place of Disposition Caldwells Funeral & Cremation Arrangement Center	33. State Oregon	34. ZIP Code + 4 97845
35. Manner of Disposition Cremation	36. Name and Complete Address of Funeral Facility Vinal T Golden Funeral Service 605 Commercial Street SE, Salem, Oregon 97301	37. Date of Disposition July 11, 2014	38. Funeral Director's Signature Carol J. Golden, Director
39. Amendment Footnote Amendment Footnote: Berry, Resident Address: Street Number: 4022; Mother's Middle Name Formerly: Jagne, Informant Relationship Formerly: Doctor, Disposition-Place City Formerly: Seaside, Occupation Formerly: None, Industry Formerly: None, Hispanic Origin Formerly: White, race: 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100, 101, 102, 103, 104, 105, 106, 107, 108, 109, 110, 111, 112, 113, 114, 115, 116, 117, 118, 119, 120, 121, 122, 123, 124, 125, 126, 127, 128, 129, 130, 131, 132, 133, 134, 135, 136, 137, 138, 139, 140, 141, 142, 143, 144, 145, 146, 147, 148, 149, 150, 151, 152, 153, 154, 155, 156, 157, 158, 159, 160, 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961, 962, 963, 964, 965, 966, 967, 968, 969, 970, 971, 972, 973, 974, 975, 976, 977, 978, 979, 980, 981, 982, 983, 984, 985, 986, 987, 988, 989, 990, 991, 992, 993, 994, 995, 996, 997, 998, 999, 1000		40. Cause of Death Immediate Cause: Heart Failure	41. Approximate Interval From Death: 5 minutes
42. Manner of Death Natural		43. If Fracture Not Applicable	44. Did Tobacco Use Contribute to Death? No
45. Date of Injury	46. Time of Injury	47. Place of Injury	48. Injury at Work?
49. Describe how injury occurred		50. If transportation injury, specify	
51. Name and Address of Certifier Medical Doctor Certifier Not Available 170 Ford Road, John Day, Oregon 97845			
52. Name and Title of Attending Physician (Other than Certifier)		53. Title of Certifier M.D.	54. Date Signed July 08, 2014

Next we will be looking in detail at the type of footnote counties add to death records – one based on a funeral director affidavit.



Let's take a closer look --

What are the required elements in a footnote?

First the amendment includes a description of the item or items being amended, and the exact information that was previously listed;

Death amendments

Ask State office for footnote guidelines cheat sheet.

**Let's take a closer look**

**45. Amendment** Decedent –First Name formerly Barry, Resident Address –Street Name formerly Oak Ave; Occupation formerly None; Industry formerly None; Hispanic Origin formerly White; corr. by F. Dir. Aff. Jul-08-2014 L. Smith, Co. Reg., pt

Source of affidavit

**Funeral Director footnote includes:**

- Description of item
- Replaced item
- Source of affidavit
- Name/title of person with authority to approve
- Date of amendment
- Initials of person changing the record

Second, it gives a short description of the source for the amendment – in this case a Funeral Director Affidavit;

Death amendments

Ask State office for footnote guidelines cheat sheet.

**Let's take a closer look**

**45. Amendment** Decedent -First Name formerly Barry, Resident Address -Street Name formerly Oak Ave; Occupation formerly None; Industry formerly None; Hispanic Origin formerly White; corr. by F. Dir. Aff. Jul-08-2014 L. Smith, Co. Reg., pt

Name/title of person with authority to amend  
(Must be County Registrar)

**Funeral Director footnote includes:**

- Description of item
- Replaced item
- Source of affidavit
- Name/title of person with authority to approve
- Date of amendment
- Initials of person changing the record

Third, it lists the person with authority to approve the change in the record;

Death amendments

Ask State office for footnote guidelines cheat sheet.

**Let's take a closer look**

**45. Amendment** Decedent –First Name formerly Barry, Resident Address –Street Name formerly Oak Ave; Occupation formerly None; Industry formerly None; Hispanic Origin formerly White; corr. by F. Dir. Aff. Jul-08-2014 L. Smith, Co. Reg., pt

Date of amendment

**Funeral Director footnote includes:**

- Description of item
- Replaced item
- Source of affidavit
- Name/title of person with authority to approve
- Date of amendment
- Initials of person changing the record

Fourth, the date the actual change to the record was made;

Death amendments

Ask State office for footnote guidelines cheat sheet.

**Let's take a closer look**

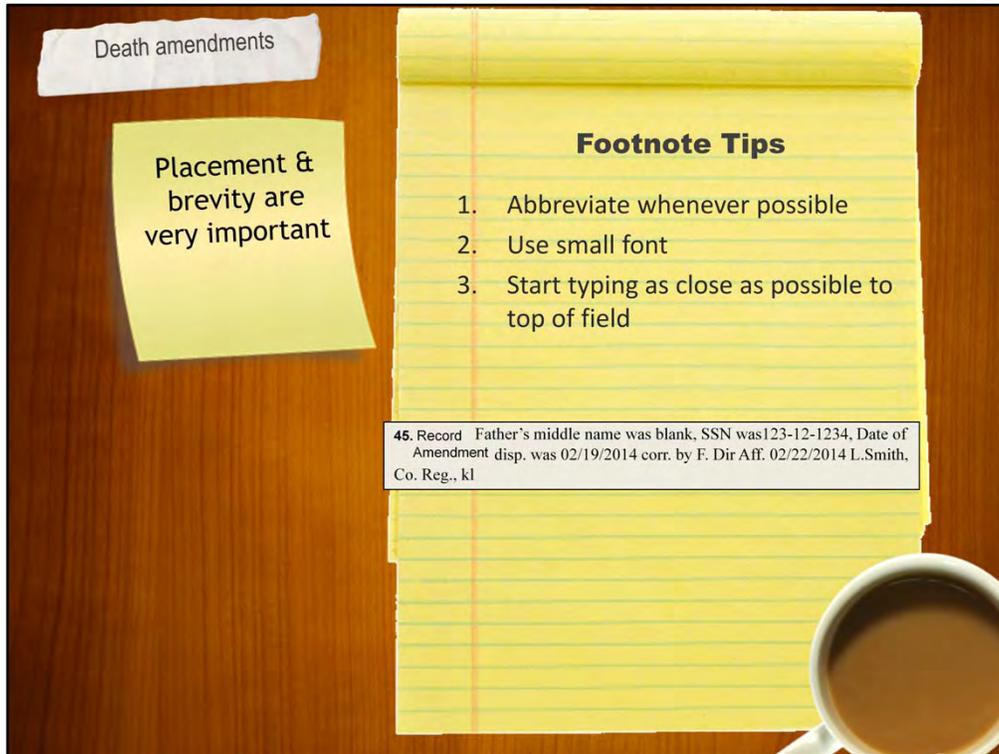
**45. Amendment** Decedent –First Name formerly Barry, Resident Address –Street Name formerly Oak Ave; Occupation formerly None; Industry formerly None; Hispanic Origin formerly White; corr. by F. Dir. Aff. Jul-08-2014 L. Smith, Co. Reg., pt

*Initials of person changing the record*

**Funeral Director footnote includes:**

- Description of item
- Replaced item
- Source of affidavit
- Name/title of person with authority to approve
- Date of amendment
- Initials of person changing the record

and last, the initials of the person making the change to the record.



Death amendments

Placement &  
brevity are  
very important

### Footnote Tips

1. Abbreviate whenever possible
2. Use small font
3. Start typing as close as possible to top of field

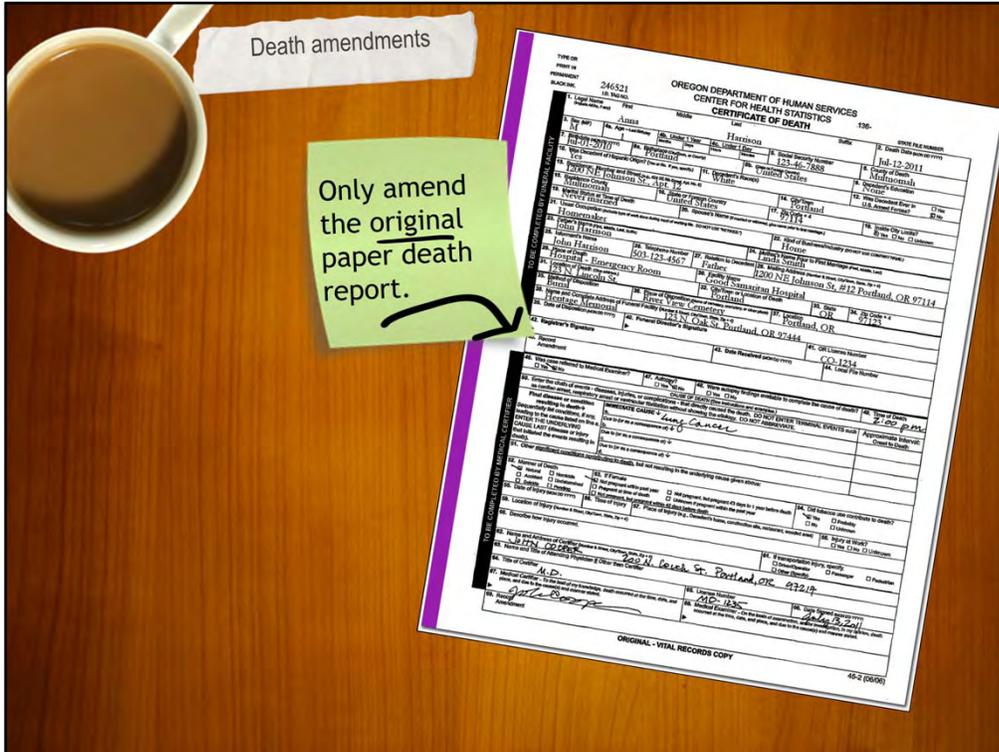
45. Record Father's middle name was blank, SSN was 123-12-1234, Date of Amendment disp. was 02/19/2014 corr. by F. Dir Aff. 02/22/2014 L. Smith, Co. Reg., kl

When typing a footnote placement and brevity are very important.

- (1) Always abbreviate to make the footnote as short as possible;
- (2) Use a small font, if one is available.
- (3) Start typing the footnote as close to the top line and as far left as possible in the footnote space.

There is always a chance that another footnote will need to be added in the same small space.

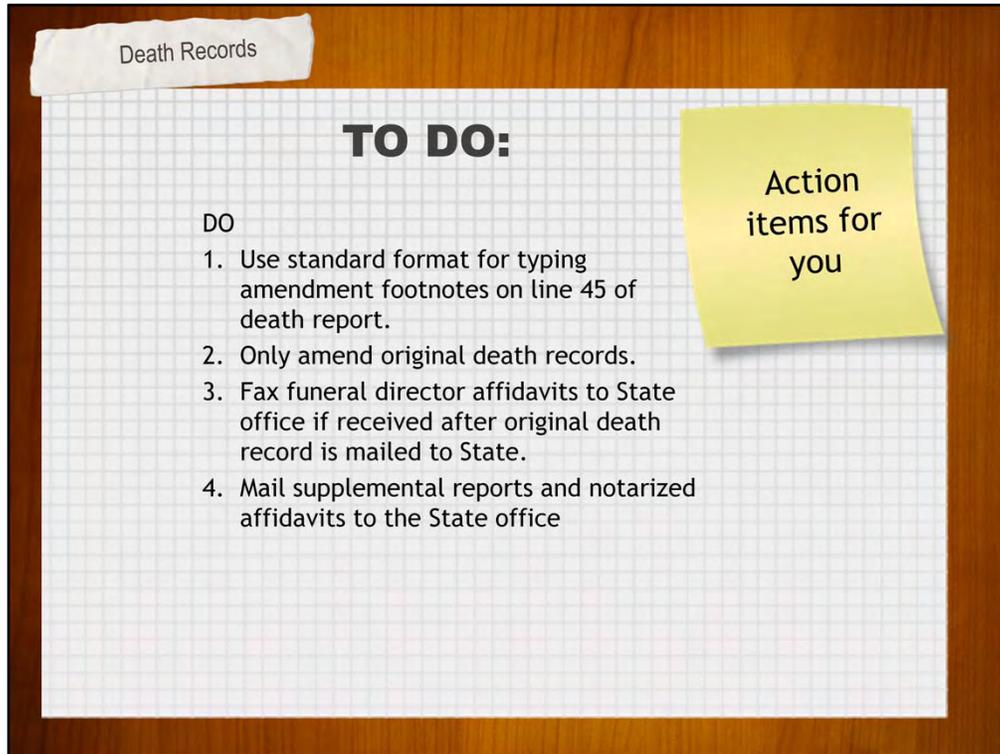
To assist you, we will be sending out a handout showing common abbreviations and a sample footnote with the correct format for footnotes.



And to review: – only amend the original paper record.  
It should have the purple border on the left side.

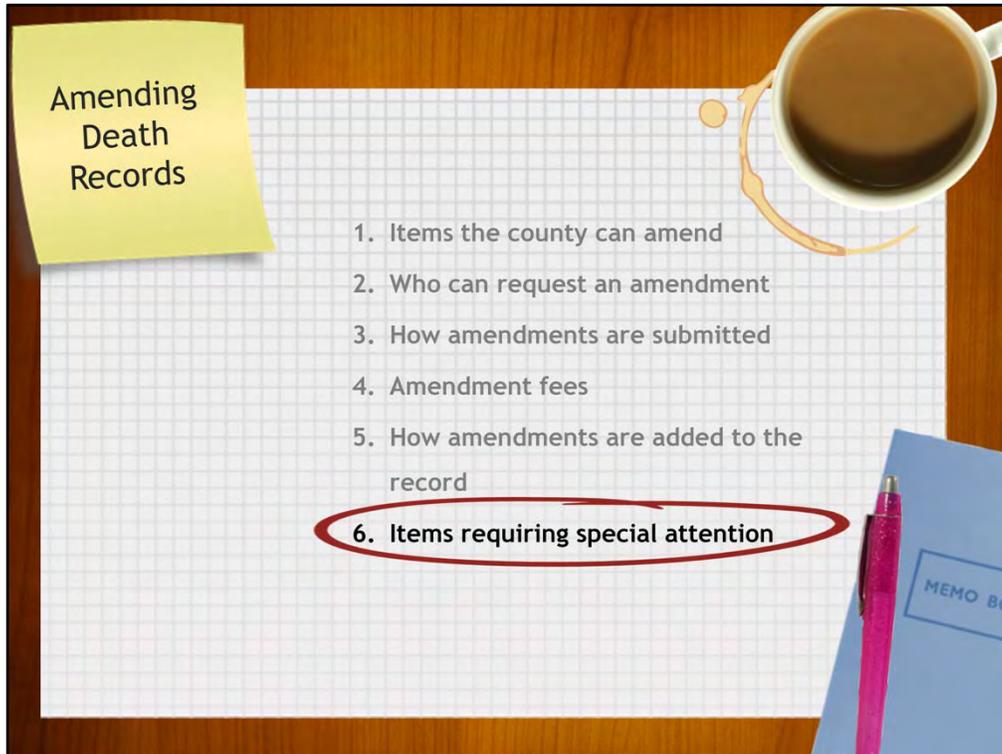


If you get a correction affidavit from a funeral director when you don't have the original record, fax it to Patty Thompson at 971-673-1201.



And here is another action list for you for future reference:

1. Use the standardized format to add amendment footnotes to the death record;
2. Only amend while original death records are in your office;
3. Fax funeral director affidavits to the State if they are received after originals are mailed;
4. Mail supplemental reports and notarized affidavits to the State office – do not correct the death record.



Next we are going to review amendment requests that need special attention.

Some changes have the potential to result in fraud. One has new legal requirements that must be followed.

Death amendments

# 6 Items Requiring Special Attention

Changes to:

1. Name/identity of decedent
2. Social Security Number
3. Marital status/spouse's name
4. Decedent's residence address
5. Funeral Director signature
6. Name of funeral home

Note to self:  
Pay special  
Attention

There are six amendments that need special attention.  
They include:

Changes to the name/identity of the decedent;

Changes to a verified Social Security Number;

Changes in marital status or the name of the spouse of the decedent;

Changes in the decedent's address—specifically the residence state;

Changing the funeral director signature,

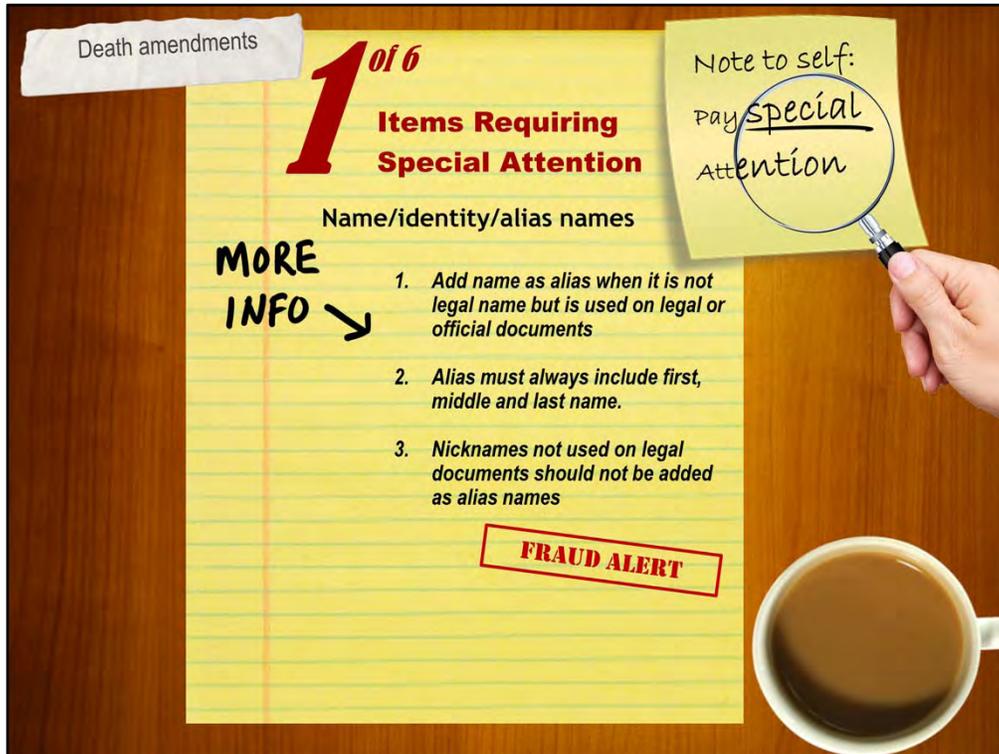
And changing the name of the funeral home.



The first amendment item to review carefully is a change in the decedent's name.

When reviewing amendments to the decedent's name,

It is fine to correct the spelling of the same name,  
Add missing parts of the name,  
Or correct typographical errors in a name.



The name of a decedent should reflect the legal name on their birth record, their name after it was changed by marriage or their name after a change by court judgment.

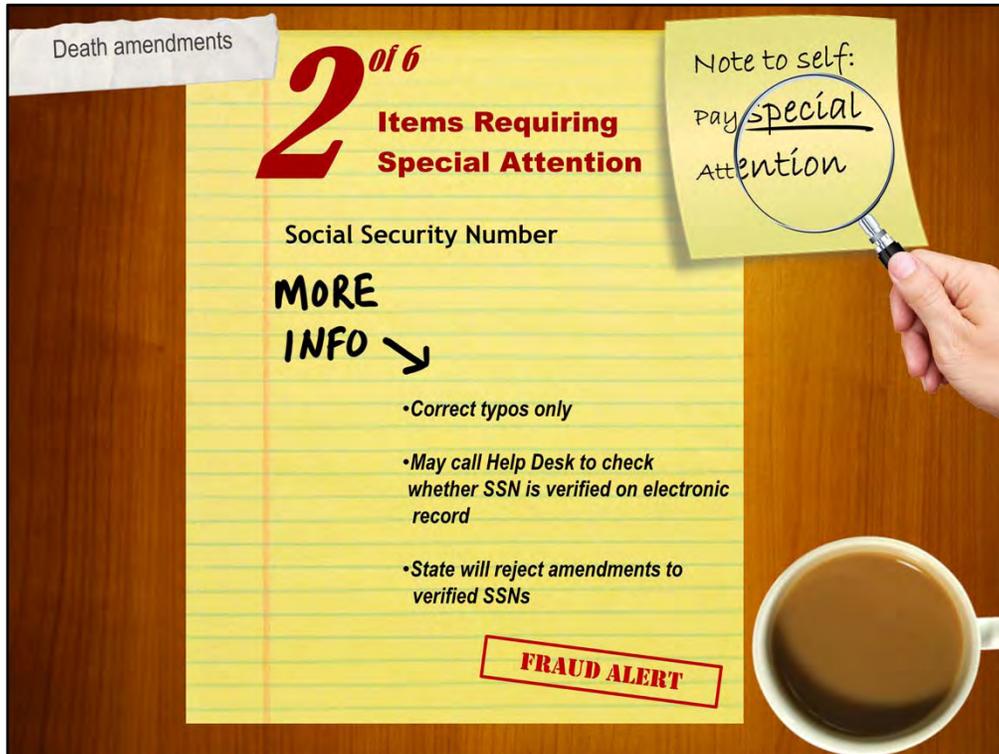
If the decedent used more than one name then adding an alias name to the birth record rather than amending the legal name may be appropriate.

An alias name is appropriate when the decedent used it on legal or other official documents such as their marriage record or their child's birth record or on their driver's license.

For instance if John Jay Allen began using John Jay Smith it would be appropriate to have John Jay Allen as the legal name and John Jay Smith as an alias name.

Amendments to add an alias name should always include the first, middle and last name of the decedent.

Nicknames not used on legal documents do not need to be added as alias names.



The second item to review carefully is a change to the Social Security Number.

SSNs are included on many financial accounts such as insurance, pension and bank and savings accounts. A fraudulent SSN may make it possible for someone to receive benefits they are not entitled to.

It is fine to correct typographical errors but it is wise to check if the SSN on electronic records was “approved by SSA” as verified.

County staff may call the OVERS help desk to check whether the SSN is verified on an electronic record.

If the State office receives an amendment to a verified SSN, the amendment will be rejected.



The third item is marital status and name of spouse. There is new law related to changing marital status and/or the name of the spouse on a death record.

The law now requires a different affidavit and evidence documents for some changes.

Remember that changing marital status and the name of a spouse can have a significant impact on the handling of the decedent's estate and benefits for the spouse.

Counties should only correct typographical errors in a spouse's name when an affidavit is received from the funeral director.

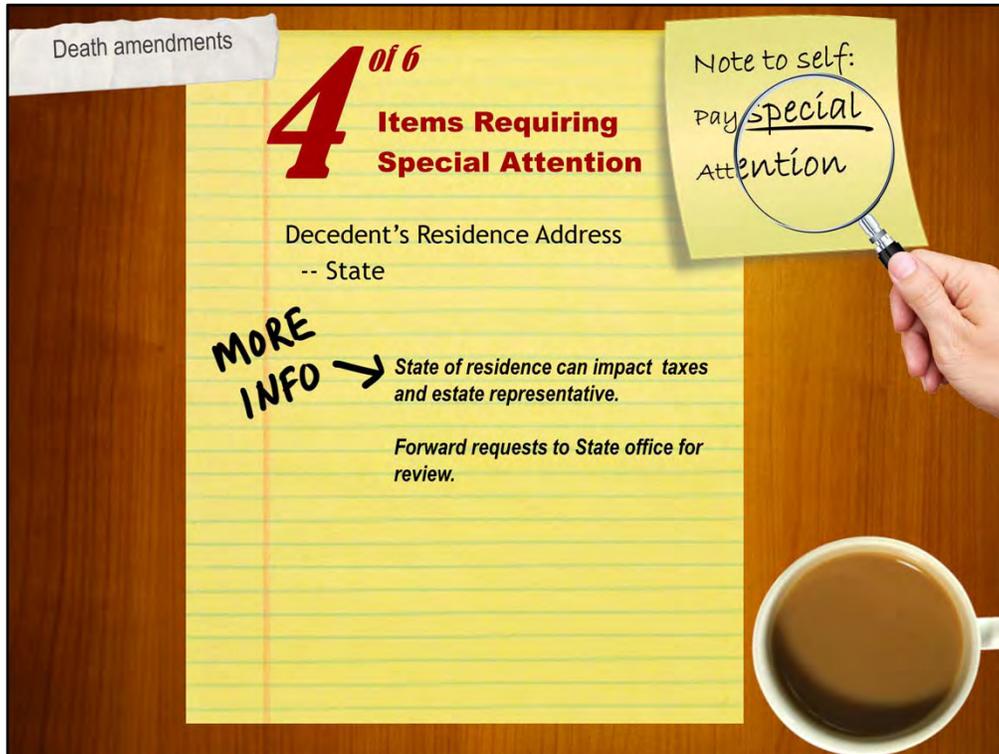
Forward all other amendment affidavits to these items to the state office.

You may occasionally be asked to notarize signatures on this type of affidavit for an informant or the spouse.

You can help by...

- Notarizing affidavits for marital status

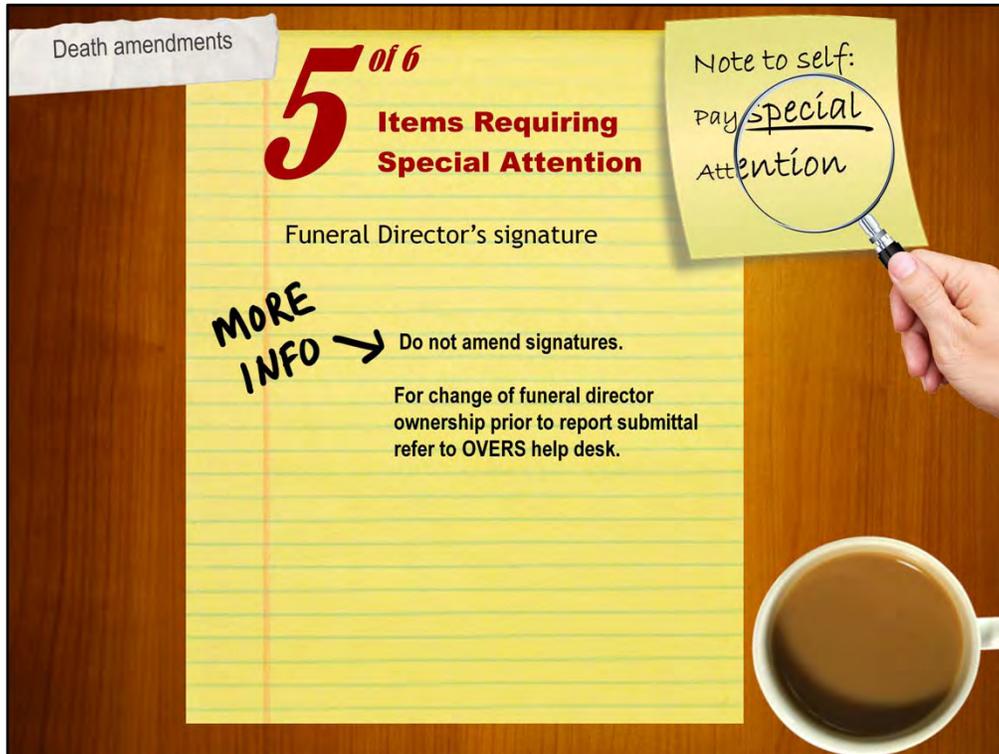
- Instruct customers to talk to the State office before submitting them.



The fourth item to review carefully are requests to change the entire residence address for the decedent if it changes the residence state.

A decedent's residence state determines where probate will occur on the decedent's estate. So it can change taxes owed on the estate and which court appoints the estate representative.

Please forward requests to amend this item to the state office for review.



The 5th amendment to watch for is a change to the funeral director's signature.

Once the record is registered we do not amend the certifier's signature.

Amendments to signature are rejected unless a replacement death record is submitted by a medical examiner.

If you get a call from a funeral director about a change prior to submittal, the OVERS help desk can assist them with relinquishing and transferring the electronic record.

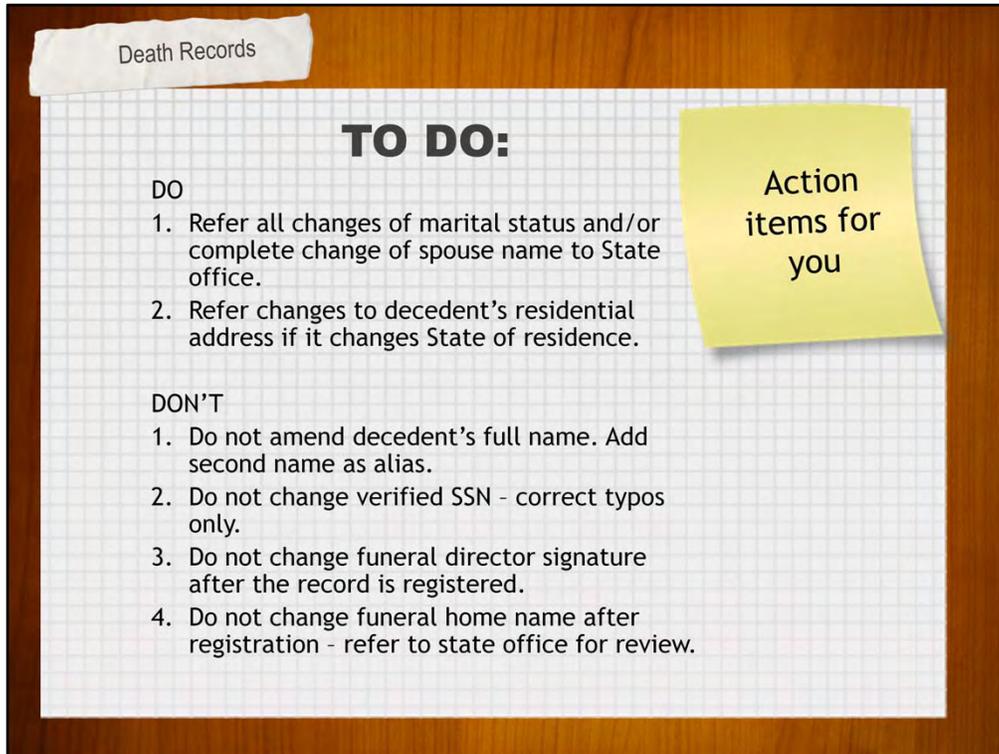


The 6th item to watch carefully are requests for a complete change in the funeral home name after the record is registered.

Once the death record is registered only typographical errors are amended.

We recommend that you forward all complete changes in funeral home name after registration to the state office.

Again the OVERS help desk can assist with transferring an electronic death record to another funeral home before the record is submitted and registered.



So here is our final County Action Item list with reminders about the problem amendment types we have just discussed:

DO Refer all requests to amend marital status and/or name of spouse to the state office;

•Refer requests to change residence address if it changes the state of residence;

DON'T

- Amend decedent's full name...Instead consider adding an alias name instead of changing decedent's name when appropriate;
- Do not change a verified Social Security number – correct typos, only;
- Do not change funeral director signature after the record is registered;
- Do not change funeral home name after record has been registered.
- Refer any of these amendment requests to the State office.
- And that's the end of my presentation—and we now have time again for your questions and comments.

Thank You !

Contact information of presenters:

Carol Sanders, State Certification Manager

971-673-1178

[Carol.a.sanders@state.or.us](mailto:Carol.a.sanders@state.or.us)