



# Vital Records

## Case Study: Town of Brookhaven, NY

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# Self-Service Portal Curbs Vital Records Traffic

Funeral directors in the Town of Brookhaven are making fewer trips to the Town Clerk's office thanks to a Laserfiche form that allows them to order and pay for copies of death certificates online. Not only is this Web portal a convenience, it demonstrates how the Town is continuing on its path to creating a paperless work environment that boosts efficiency and saves taxpayers money.

## Town Seizes Opportunity to Improve Service

In early 2017, New York State implemented the Electronic Death Registry System (EDRS), which enabled death registration users – funeral homes, hospitals, nursing homes, hospice facilities and physicians – to file death records electronically. EDRS eliminated the need for Funeral Directors to travel to the Town Hall to file a death certificate. However, they still needed to order certified copies of the death certificate in person or by mail.

Brookhaven Town Clerk Donna Lent listened to the requests of local funeral directors who wanted a way to order copies of an electronically filed death certificate online – essentially streamlining the new death registration process. "Many funeral homes are small family-owned businesses. I saw an opportunity to ease some of the workload of the funeral directors and allow them to spend more time at their business instead of traveling to and from Town Hall," she said. At Town Clerk Lent's urging, the Town moved forward on what became a portal project.

## From Request to Launch in Just Two Months

The project was a collaboration that included Town Clerk staff, Programming and Systems staff, a trainer and ICC Community Development Solutions support. Laserfiche Forms allowed the Town to create a useful form for end users that can be automatically stored at the end of a process. The finalized form requires virtually no ongoing IT support.

A formal request was submitted to the Brookhaven's IT Department in February and was assigned to the Department's Laserfiche Forms specialist. Late in development, the team tested their prototype with a funeral director. By the first week of May, the Funeral Director Portal was up and running. The Town Clerk sent informational letters out to funeral homes and the rest is history.

## Simple, Fast Ordering, Available 24/7

The actual Laserfiche form is entitled "Funeral Director Request for Death Certificate" and is accessed through a secure URL. Once on the proper link, a funeral director does the following to place an order:

- Enters decedent information
- Indicates how many certified copies are needed; fees are then calculated automatically and displayed on the form
- Enters funeral home address to which the copies will be mailed
- Acknowledges the order with an electronic signature and clicks "Submit"

When the confirmation screen appears, the funeral director clicks on the link to submit payment through the Town's Forte payment account. Within three business days, the requested copies are placed in the mail to the funeral home.

## Behind-the-Scenes Automation Keeps Processing on Track

Laserfiche performs a variety of housekeeping tasks once the form is submitted. The software creates a confirmation number that ties the request order to the Forte transaction. It kicks off an email to notify the Town of the pending request. After Forte emails payment verification, staff in the Clerk's Office checks the confirmation number against the Laserfiche form and proceeds to review and fulfill the order. Once that's done, Laserfiche stores the original form to provide a paperless record of the transaction.

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## Welcome to the Virtual Service Counter

“The feedback from the funeral directors who use the portal has been positive,” reported Town Clerk Donna Lent. “They like being able to order online without being subject to the confines of office hours. Plus, the portal reduces the time they spend traveling to the various registrars. They appreciate services that reduce their administrative burden.”

The Death Certificate request form is another milestone in Town Clerk Lent’s efforts to transform how Brookhaven does business. “I believe our success with the Funeral Director Portal further opens the door to automating additional Town Clerk processes,” said Town Clerk Lent. “Our use of the Laserfiche Forms module helps reduce lines and wait times at our service counter. While we currently offer evening hours on Mondays, Web services will be an even more flexible way to accommodate our constituents. Among other ideas, we are working with IT to develop online dog license renewals using Laserfiche Forms.”

Town Clerk Lent’s initiatives to utilize Laserfiche and the Forms module to the fullest potential will allow ordinary citizens to do more of their routine business with the Brookhaven Town Clerk’s Office on their own schedules without paying for postage or gas.

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