

QUARTERLY REPORT FILING INSTRUCTIONS and SCHEDULE WORKSHEET



STATE OF OHIO
BOARD OF EMBALMERS
AND FUNERAL DIRECTORS

APPRENTICESHIP DESIGNATION

Embalmer and Funeral Director (Dual)

12-month term – 4 quarters

LABELING and SUBMITTING INSTRUCTIONS for QUARTERLY REPORTS

Please follow these guidelines to avoid delays in processing your Quarterly Reports.

Read ALL instructions before starting your first Case.

PROCEDURE:

1. Print the following Quarterly Report forms:

Apprentice Quarterly Case Report – Embalming Cases, Form 008 (you will need 1 copy per Decedent)

Apprentice Quarterly Case Report – Funeral Directing Cases, Form 009 (you will need 1 copy per Decedent)

Quarterly Master's Evaluation Report, Form 010 (give a copy to your Master)

2. Completing the paper forms:

- Apprentice fills out multiple **Embalming Case Reports** (fill these out and save them as you complete each Case)

You will file these based on the Quarterly Report Schedule Worksheet, page 2

- Apprentice fills out multiple **Funeral Directing Case Reports** (fill these out and save them as you complete each Case)

You will file these based on the Quarterly Report Schedule Worksheet, page 2

- Master fills out one **Quarterly Master's Evaluation Report** per quarter

3. Apprentice collects the completed **Quarterly Master's Evaluation Report** and all appropriate completed

Embalming Case Reports and **Funeral Directing Case Reports**, and scans them into their computer. Use the **"Save As"** feature to rename your scanned documents according to the chart below.

Note: There is only one **Quarterly Master's Evaluation Report** per quarter but you will submit it twice, once for your **Certified Embalmer Apprenticeship license**, and once for your **Certified Funeral Director Apprenticeship license**.

IMPORTANT: Combine **ALL Embalming Case Reports** for the quarter into one electronic .pdf file and use the appropriate quarterly "Save As" file name from column 3 below. Then, combine **ALL Funeral Directing Case Reports** for the quarter into one electronic .pdf file and use the appropriate quarterly "Save As" file name from column 3 below.

Reason for Submitting Additional Documentation Request	Master's Evaluation Report scan "Save As" File Name	Apprentice Case Report scan "Save As" File Name
Q1 Master Report and Q1 EMB Reports	Q1 Master Report	Q1 EMB Reports
Q1 Master Report and Q1 FD Reports	Q1 Master Report	Q1 FD Reports
Q2 Master Report and Q2 EMB Reports	Q2 Master Report	Q2 EMB Reports
Q2 Master Report and Q2 FD Reports	Q2 Master Report	Q2 FD Reports
Q3 Master Report and Q3 EMB Reports	Q3 Master Report	Q3 EMB Reports
Q3 Master Report and Q3 FD Reports	Q3 Master Report	Q3 FD Reports
Q4 Master Report and Q4 EMB Reports	Q4 Master Report	Q4 EMB Reports
Q4 Master Report and Q4 FD Reports	Q4 Master Report	Q4 FD Reports

(see next page)

USING eLICENSE TO FILE:

Now you are ready to login to your eLicense dashboard.

4. Select your **Certified Embalmer Apprenticeship** license.

Click on **OPTIONS** and choose **Submit Additional Documentation** from the drop down menu.

The system will prompt you to enter text in the **Reason for Submitting Additional Documentation Request** field.

Use the appropriate text from column 1 (previous page).

Ex: Q1 Master Report and Q1 EMB Reports

5. Click **Save and Upload Documents**.

This will take you to the upload page where you will choose your files from your computer.

You will upload:

1. One electronic .pdf file containing your **Quarterly Master's Evaluation Report** for that quarter

Ex: Q1 Master Report

2. One electronic .pdf file containing **ALL** of your **Embalming Case Reports** for that quarter

Ex: Q1 EMB Reports

Click **SUBMIT**, you will get a message that says **Service Request Submitted**. Click **DONE**.

6. Next, go to your **Certified Funeral Director Apprenticeship** license. Follow the same procedure as above.

You will upload:

1. One electronic .pdf file containing your **Quarterly Master's Evaluation Report** for that quarter

Ex: Q1 Master Report (this will be the same file you uploaded for the Embalmer license)

2. One electronic .pdf file containing **ALL** of your **Funeral Directing Case Reports** for that quarter

Ex: Q1 FD Reports

Click **SUBMIT**, you will get a message that says **Service Request Submitted**. Click **DONE**.

You will follow this same procedure every time you file Quarterly Reports.

QUARTERLY REPORT SCHEDULE WORKSHEET

DO NOT SUBMIT THIS WORKSHEET

Fill out the schedule according to your Start Date and use it as a guide to stay on track with your report filings.

Please spread out reports over all quarters as suggested.

Report Type	QUARTER 1 Number of Cases	Start Date of your 1st Quarter	Due Date Approx. 90 days (3 months) from your Start Date
Embalming Cases	6		
Funeral Directing Cases *			
Funeral/Memorial Services	6		
Arrangement Conferences	6		
Master's Quarterly Evaluation Report	1		

* Cases that include both a Funeral/Memorial Service AND an Arrangement Conference can count for both.

Report Type	QUARTER 2 Number of Cases	Start Date of your 2nd Quarter	Due Date Approx. 180 days (6 months) from your Start Date
Embalming Cases	6		
Funeral Directing Cases *			
Funeral/Memorial Services	6		
Arrangement Conferences	6		
Master's Quarterly Evaluation Report	1		

* Cases that include both a Funeral/Memorial Service AND an Arrangement Conference can count for both.

Report Type	QUARTER 3 Number of Cases	Start Date of your 3rd Quarter	Due Date Approx. 270 days (9 months) from your Start Date
Embalming Cases	6		
Funeral Directing Cases *			
Funeral/Memorial Services	6		
Arrangement Conferences	6		
Master's Quarterly Evaluation Report	1		

* Cases that include both a Funeral/Memorial Service AND an Arrangement Conference can count for both.

Report Type	QUARTER 4 Number of Cases	Start Date of your 4th Quarter	Due Date Approx. 365 days (12 months) from your Start Date
Embalming Cases	6		
Funeral Directing Cases *			
Funeral/Memorial Services	6		
Arrangement Conferences	6		
Master's Quarterly Evaluation Report	1		

* Cases that include both a Funeral/Memorial Service AND an Arrangement Conference can count for both.

BOARD MEMBER INTERVIEW AND APPRENTICESHIP TERMINATION INFORMATION

BOARD MEMBER INTERVIEW SCHEDULE

Action Item	Interview Date
6-Month Apprentice Interview w/Board Member	Notify Kim Grossman at KGrossman@funeral.ohio.gov when you reach your 6-month mark. She will work with you to schedule your interview.

APPRENTICESHIP TERMINATION FORMS Due within 30 days after your Apprenticeship End Date

Action Item	Who Fills It Out	Who Signs It
Certification of Embalming Cases	Apprentice	Apprentice and Master
Certification of Funeral Directing Cases and Arrangement Conferences	Apprentice	Apprentice and Master
Affidavit of Additional Training	Apprentice	Apprentice and Master
Official Termination of Apprenticeship Form * Must be Notarized	Apprentice and Master	Apprentice and Master