

MASTER'S CHECKLIST OF REQUIRED TASKS



STATE OF OHIO
BOARD OF EMBALMERS
AND FUNERAL DIRECTORS

APPRENTICESHIP DESIGNATION

☐ **DUAL** (Embalmer and Funeral Director) ☐ **Embalmer Only** ☐ **Funeral Director Only**

Apprentice's Name _____ Certification # _____
Currently in Quarter (circle one) 1 2 3 4 5 6 7 8 of a _____ month Apprenticeship (indicate 12 or 24 month)

Master's Name _____
Funeral Home Name _____
Funeral Home Address _____
City or Village _____
Funeral Home County _____
Daytime Phone _____

This form is for your personal use and does not have to be submitted to the Board

The following list of tasks is to be reviewed with your Apprentice every six months for the duration of their Apprenticeship.

QUANTITY REQUIRED

At least **10 Transfers**, with at least one from each of the following:
- Residence, - Hospital, - Institution

This section applies to **ALL** Apprenticeship Designations

TRANSFERS

Note: If funeral home uses a transfer service, apprentice should ride along or meet at point of transfer

- ☐ Understand and use proper telephone technique
- ☐ Take first call, obtain necessary information
- ☐ Have familiarity with local religious organizations and customs
- ☐ Prepare equipment necessary for transportation of remains
- ☐ Obtain and prepare documentation for transfer from place of death
- ☐ Use Universal Precautions related to transfer from place of death
- ☐ Direct and assist family members present during transfer
- ☐ Participate in late-night/middle-of-night and/or weekend transfers
- ☐ Participate in sanitation of transfer vehicles and cots

Comments: _____

This section applies to **ALL** Apprenticeship Designations

PREPARATION OF BODY

- ☐ Assist in preparation of embalmed and unembalmed remains for viewing
- ☐ Assist in dressing
- ☐ Assist in cosmetizing
- ☐ Assist in casketing
- ☐ Assist in scheduling and observing the beautician, barber or cosmetologist
- ☐ Assist in scheduling necessary personnel

Comments: _____

QUANTITY REQUIRED

At least **25 Embalmings**, under the Direct Supervision of the Master, broken down as follows:

5 observe only, 5 personally assist, 15 perform under Director Supervision

This section applies to **EMBALMER ONLY** and **DUAL** Apprenticeships

EMBALMING

- ☐ Verify permission to embalm from authorizing agent
- ☐ Understand and use Universal Precautions
- ☐ Transfer from stretcher or cot to preparation table
- ☐ Position on preparation table
- ☐ Perform pre-embalming analysis
- ☐ Bathe, shampoo and disinfect
- ☐ Set facial features
- ☐ Discuss and select injection and drainage sites
- ☐ Discuss and select injection and drainage methods
- ☐ Discuss and select techniques for raising vessels
- ☐ Discuss and select chemical mixture
- ☐ Operate and maintain embalming machine
- ☐ Perform maintenance
- ☐ Discuss and select aspiration techniques
- ☐ Discuss and select cavity treatment
- ☐ Discuss and select methods of closing incisions
- ☐ Discuss and select suturing techniques
- ☐ Perform restorative techniques
- ☐ Clean and sanitize preparation room

Apprentices and Masters are encouraged to include at least one of each of the following:

- ☐ Embalming and suturing of autopsied bodies
- ☐ Restorative cases
- ☐ Children/Stillborns
- ☐ Tissue/Organ Donors

Comments: _____

This section applies to **FUNERAL DIRECTOR ONLY** and **DUAL** Apprenticeships

FUNERAL HOME POLICIES AND PROCEDURES

- ☐ Demonstrate knowledge of insurance assignments, policies, practices, forms and payment options for both Preneed and At-need funerals
- ☐ Demonstrate knowledge of payment policy and billing procedures
- ☐ Prepare obituaries
- ☐ Prepare/order memorial products

This section applies to **ALL** Apprenticeship Designations

- ☐ Answer phones and consumer inquiries
- ☐ Inventory and order supplies
- ☐ Complete Death Certificates using EDRS, **QUANTITY REQUIRED:** at least 15
- ☐ Prepare Certificates of Service, if required
- ☐ Prepare Burial Permit/Cremation Permit using EDRS, **QUANTITY REQUIRED:** at least 15
- ☐ Participate in day-to-day errands as they relate to the funeral home's operation
- ☐ Participate in maintenance of the public areas of the funeral home and the funeral home vehicles

Comments: _____

QUANTITY REQUIRED

For reporting purposes, if Apprentice participates in **BOTH** the Arrangement Conference **AND** Funeral/Memorial Service for the **SAME** Decedent, it counts as 1 Arrangement Conference **AND** 1 Funeral/Memorial Service.

At least **25 Arrangement Conferences**, under the Direct Supervision of the Master, broken down as follows:

5 observe only, 5 personally assist, 15 perform under Direct Supervision – for **DUAL Apprentices**

At least **50 Arrangement Conferences**, under the Direct Supervision of the Master, broken down as follows:

10 observe only, 15 personally assist, 25 perform under Direct Supervision – for **FUNERAL DIRECTOR ONLY Apprentices**

This section applies to **FUNERAL DIRECTOR ONLY** and **DUAL** Apprenticeships

ARRANGEMENT CONFERENCES

- ☐ Demonstrate knowledge of merchandise offered by the funeral home
- ☐ Demonstrate knowledge of service options available to families
- ☐ Demonstrate knowledge of credit policies of the funeral home
- ☐ Schedule time/place for family meeting
- ☐ Obtain necessary family information via phone
- ☐ Obtain biographical information
- ☐ Complete funeral arrangement forms, including statement of goods and services
- ☐ Contact and schedule clergy
- ☐ Contact cemeteries and/or crematories and schedule necessary services
- ☐ Secure outer burial container provider (when necessary)
- ☐ Contact and schedule services of florist, musicians and vocalists (when necessary)
- ☐ Assist with special requests of the family

Comments: _____

QUANTITY REQUIRED

For reporting purposes, if Apprentice participates in **BOTH** the Arrangement Conference **AND** Funeral/Memorial Service for the **SAME** Decedent, it counts as 1 Arrangement Conference **AND** 1 Funeral/Memorial Service.

At least **25 Funeral/Memorial Services**, under the Direct Supervision of the Master, broken down as follows:

5 observe only, 5 personally assist, 15 perform under Direct Supervision – for **DUAL Apprentices**

At least **50 Funeral/Memorial Services**, under the Direct Supervision of the Master, broken down as follows:

10 observe only, 15 personally assist, 25 perform under Direct Supervision – for **FUNERAL DIRECTOR ONLY Apprentices**

This section applies to **FUNERAL DIRECTOR ONLY** and **DUAL** Apprenticeships

FUNERAL/MEMORIAL SERVICES

- ☐ Place flowers
- ☐ Greet visitation/funeral attendees
- ☐ Arrange music
- ☐ Arrange seating
- ☐ Open/close casket
- ☐ Instruct and assist pall bearers
- ☐ Assemble Funeral Procession
- ☐ Drive vehicles in procession
- ☐ Assist, direct and/or perform graveside committal services
- ☐ Close graveside committal services
- ☐ Direct and instruct funeral attendees as they leave the services
- ☐ Complete the post-service process with client families

Comments: _____

This section applies to **FUNERAL DIRECTOR ONLY** and **DUAL** Apprenticeships

PRENEED FUNERAL ARRANGEMENTS

- ☐ Observe at least 3 family Preneed arrangement meetings
- ☐ Conduct at least 3 family Preneed arrangement meetings under Direct Supervision
- ☐ Complete required documentation (worksheets)
- ☐ Perform financial transactions/documentation as required by law
- ☐ Knowledge of funeral contract disclosures as required by law
- ☐ Knowledge of the ARPPS reporting system software
- ☐ (Automated Reporting and Preneed Payment System)

Comments: _____

This section applies to **ALL** Apprenticeships

CREMATION

- ☐ Verify the identity of the human remains to be cremated
- ☐ Prepare remains for receiving crematory
- ☐ Prepare required cremation forms
- ☐ Escort human remains to crematory
- ☐ Observe at least 3 cremations
- ☐ Observe and/or transfer remains to urn
- ☐ Handle and deliver cremated remains per authorization instructions

Comments: _____

This section applies to **ALL** Apprenticeships

OSHA, FEDERAL TRADE COMMISSION, and ORC/OAC

- ☐ Demonstrate knowledge of MSDS records and OSHA records
- ☐ Demonstrate knowledge of the FTC Funeral Rule
- ☐ Demonstrate knowledge of general price list requirements
- ☐ Demonstrate familiarity with Ohio Revised Code (ORC) 4717, and Ohio Administrative Code (OAC) 4717

Comments: _____

This section applies to **FUNERAL DIRECTOR ONLY** and **DUAL** Apprenticeships

VETERANS ADMINISTRATION AND SOCIAL SECURITY

- ☐ Prepare VA Benefits paperwork
- ☐ Prepare Social Security paperwork

Comments: _____

ADDITIONAL TRAINING REQUIREMENTS, Attend in person or by electronic method:

This section applies to **FUNERAL DIRECTOR ONLY** and **DUAL** Apprenticeships

- ☐ One marketing seminar (topics can range from Preneed sales to general funeral services)
- ☐ One grief counseling/management seminar

This section applies to **EMBALMER ONLY** and **DUAL** Apprenticeships

- ☐ One embalming seminar (topics can range from chemicals to actual procedures)

This section applies to **ALL** Apprenticeships

- ☐ OSHA Training
- ☐ One State of Ohio Board of Embalmers and Funeral Directors monthly Board Meeting
- ☐ One additional funeral profession seminar of your choice

Comments: _____

CONFIRMATION OF TERMINATION FORMS

Please confirm that all of the following documents are complete. All termination forms must be submitted to the Board by the Apprentice no later than 10 days after the date of termination. Failure to submit items within 10 days could extend the Apprenticeship period.

Certification of Embalming Cases

Embalmer Only or **Embalmer and Funeral Director (Dual)**

25 Cases ☐ Complete

Certification of Funeral Directing Cases and Arrangement Conferences

Embalmer and Funeral Director (Dual)

25 Arrangement Conferences ☐ Complete

25 Funeral/Memorial Services ☐ Complete

Funeral Director Only

50 Arrangement Conferences ☐ Complete

50 Funeral/Memorial Services ☐ Complete

Cases are per Decedent. For reporting purposes, if Apprentice participates in **BOTH** the Arrangement Conference **AND** Funeral/Memorial Service for the **SAME** Decedent, it counts as 1 Arrangement Conference **AND** 1 Funeral/Memorial Service.

Affidavit of Additional Training ☐ Complete

Signed and Notarized

Termination of Apprenticeship Form ☐ Complete

Comments: _____

