



ICCFA Magazine subject spotlight

► **Mark Krause, CFuE**, (mark@krausefuneralhome.com) is president of Krause Funeral Homes & Cremation Service and Informed Choice Funeral & Cremation Options, Milwaukee, Wisconsin. His company has three funeral home locations.

► He is a past president of the ICCFA, Preferred Funeral Directors International and the Funeral Service Alliance of Wisconsin.

www.krausefuneralhome.com



► **Nancy Lohman, CCFE**, (nlohman@lohmaninc.com) is COO of Lohman Funeral Homes, Cemeteries and Cremation, Daytona Beach, Florida. The Lohman family owns 14 funeral homes and cemeteries.

► She is a licensed funeral director. She is an ICCFA vice president and a past president of the Southern Cemetery, Cremation & Funeral Association.

www.lohmanfuneralhomes.com

More on this subject

► Lohman is dean of the ICCFA University College of Administration and Management. The next session of ICCFAU will be in July 2012. More information will be posted at www.iccfa.com under Education/Events as it becomes available.

CREMATION LIABILITY/SERVICE TO FAMILIES

When we think of recordkeeping today,
we usually think in terms of computers.

But some cremation providers find that a simple
9 x 12 envelope helps them make sure all the necessary
paperwork and associated tasks are in order, every time.

WITNESS YES
STILLBORN YES
AUTH. AGENT / FAMILY NOTIFIED

CREMATION ENVELOPE

Name _____ Cremation # _____

Signature _____

Cremation Authorization
 Cremation Tag
 Cremated Remains Receipt
 Container Labels
 30 Day Form

Additional Items to be added before completing cremation:

Final Disposition
 Cremation Permit
 Copy of signed Death Certificate
 I.D. or Service with viewing completed

Authorized Signature for Cremation

The envelope that Krause Funeral Homes uses for keeping track of its cremation documents. Turn to page 42 to see the contents.

A low-tech way to keep track of the cremation paperwork

“There’s that old adage,” said funeral director Mark Krause. “There are two types of crematories: those that have been sued and those that haven’t been sued yet.”

Krause, one of the association board members involved in developing the ICCFA Cremation Guidelines, is happy to say that his crematory is in the latter category, and he plans to keep it that way.

One of the tools he uses looks simple: a 9-by-12-inch white envelope with checkboxes on the outside into which all the paperwork required when handling a cremation is placed so that it can be reviewed multiple times.

Nancy Lohman heard him make a presentation on the idea and not only

put the envelope system in place in her family’s funeral homes but also has been spreading the word at ICCFA University.

After hearing her talk about “the envelope,” ICCFA Magazine asked her to explain it for a story. She sent us to her source and agreed to talk about how she took the idea and adapted it.

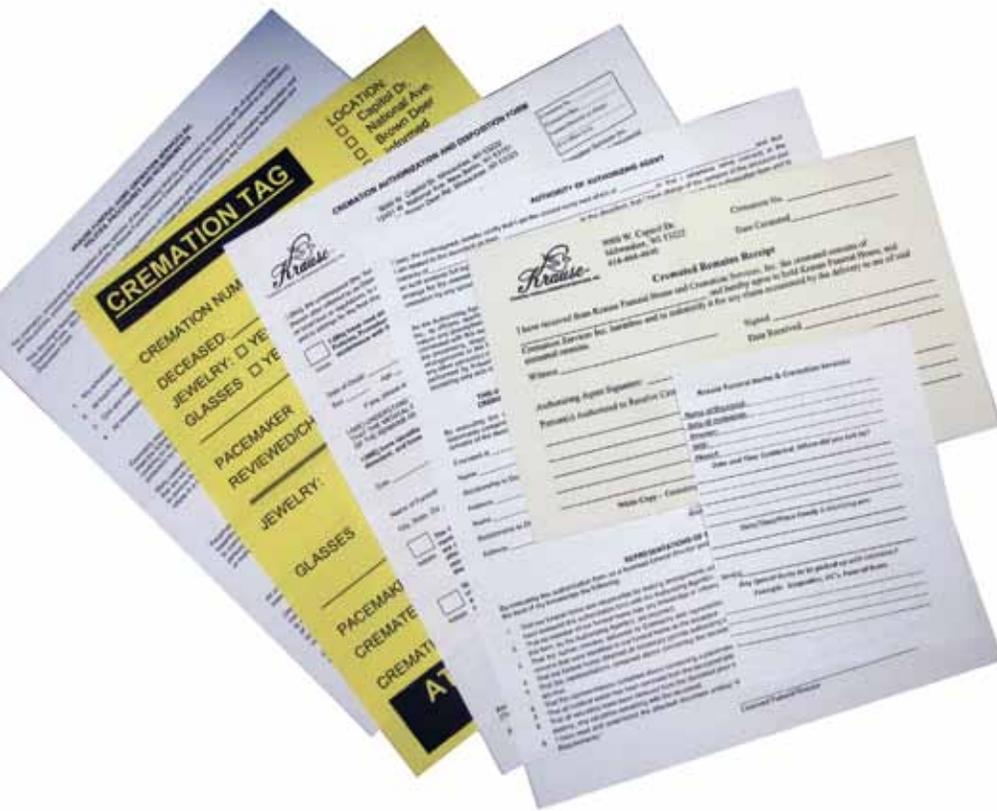
So are you the originator of the cremation envelope idea?

Krause: No, I don’t know exactly where we got the idea; it’s been around a long time as a way of keeping cremation paperwork organized so that all of the things that have to happen, happen every time.

It’s a way to help you make sure all of

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With our system, if it's found at any point in the process that one of the previous steps hasn't been completed, everything stops until that piece of information is provided and signed off for on the envelope by the person who was responsible for it. —Mark Krause



Forms added to the Krause cremation envelope as they are completed: Krause Funeral Home Cremation Services policies, procedures and requirements; cremation authorization and disposition form; cremation tag information; authority of authorizing agent; cremated remains receipt; and form detailing where the urn is to be handed over and what additional items, if any, are to be included, such as keepsakes.

the proper things are signed off on, all the proper procedures are followed, all the authorizations are signed and secured and all the property that is either being cremated or not cremated goes to the right places.

Putting everything that needs to be done in an envelope makes it so that every step along the process, everything gets double- and triple-checked.

The alternative would be that everything would be in a file drawer?

Krause: Maybe in a folder, or maybe not all together in one file. Then when it comes time to cremate, maybe that piece of paper that said a certain piece of property was not supposed to be cremated, was supposed to be returned to the family, isn't with the authorization and gets cremated.

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previous steps hasn't been completed, everything stops until that piece of information is provided and signed off for on the envelope by the person who was responsible for it.

Are all the envelopes kept in a central place?

Krause: They're in the cremation arrangement folder or account. The cremation envelope follows the account and the deceased through the different steps involved. The folder gets put in a special spot so that when the prep room guys take over, they can see that all the authorizations have been signed and they know what they're supposed to do.

The prep room people need to know if there's going to be a family ID viewing, a memorial service, a full, traditional funeral. All of these events involve different steps.

If a box is checked, do you assume that form is in there, or does each person who gets the envelope double check the contents?

Krause: You know the old adage about "assuming," right? We never assume. Even if everything is checked off, you open the envelope and make sure it's all in there. Every time. So things that happen at the beginning of the process end up getting looked at multiple times.

So if you're No. 9 on the list, you're supposed to go back and make sure the previous eight items are in there?

Krause: Yes, and the gatekeeper at the end is the crematory operator. There's a technician who goes through absolutely everything to make sure it's complete before he does anything.

By "anything," you mean doing the cremation, since it can't be undone.

Krause: Yes, the pushing of the button, the point of no return.

He checks to make sure he has everything he needs, and he's stopped the process a number of times because something wasn't filled in right or something wasn't labeled right. It can be a small thing or something big, but he makes sure it gets done, because a system only works as well as that last link in the chain.

Until that button's pushed, everything's still fixable.

What kind of training do you give people about the system?

Krause: It all starts with training arrangers and secretaries. We've developed a flow chart to guide them: If this happens, this is how you react. Most of the time—probably 90 percent—it's the director who didn't complete something, didn't get a form filled out correctly or left something blank they shouldn't have. So it usually gets sent back to the director to take care of.

What did you do before you had this system?

Krause: We didn't cremate; we used a third-party crematory. When we put in our own crematory, we called places that had their own crematories, were very involved with CANA, and found out what their

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I love systems; I think that's the only way you can run a funeral home and a cremation service and know that you're compliant with regulatory requirements in every respect. —*Nancy Lohman*

CREMATION ENVELOPE	
Name of Deceased _____ Date of Death _____	Funeral Home: <input type="checkbox"/> B&SFH <input type="checkbox"/> LFHO <input type="checkbox"/> LFHD <input type="checkbox"/> LFHPC <input type="checkbox"/> LFHPO <input type="checkbox"/> CFH <input type="checkbox"/> LFHDL <input type="checkbox"/> VCCS
Funeral Director: <input type="checkbox"/> Cremation Authorization Completed & Enclosed	Signature &/or Initials _____
Administrator: <input type="checkbox"/> Original Cremation Authorization Completed & Enclosed <input type="checkbox"/> Burial Transit Permit (White Copy) <input type="checkbox"/> Cremation Certificate <input type="checkbox"/> Cremation Certificate Envelope <input type="checkbox"/> Copy of signed Death Certificate <input type="checkbox"/> Medical Examiner Cremation Approval <input type="checkbox"/> Cremation Release Form	Signature &/or Initials _____ _____ _____ _____
Crematory Operator: <input type="checkbox"/> Completed Cremation Certificate (Added Cremation Tag# & Signed) <input type="checkbox"/> Certificate Envelope with Cremation Certificate & Cremation Release <input type="checkbox"/> Log Completed <input type="checkbox"/> CR returned to FH w/Cremation Certificate inside, Certification Envelope (taped to top of box), & Temp Sticker (if applicable) and labeled with the name of the deceased	Signature &/or Initials _____ _____

When Nancy Lohman saw Krause Funeral Homes' cremation envelope at a study group meeting, she decided to adopt and adapt the idea. She added codes for which of the company's funeral homes made the arrangement (at top right) and changed some of the items to be checked off to align with Lohman procedures and state of Florida requirements.

procedures were. We kind of put a bunch of their procedures together to create what we have. Harvey Lapin helped create our authorization form, and then over time we added a few things we wanted to require ourselves, things we wanted to do a specific way at our business.

Adopt and adapt

Nancy, what made you adopt this system? What did you do before?

Lohman: Our company grew really quickly all at once. We had one funeral home and one cemetery and outsourced our cremations because we didn't own a crematory. Then in 2002, we purchased, all at one time, two cemeteries, a crematory, a cremation society and the funeral home in Daytona, and then three weeks later, Palm Coast Funeral Home. We suddenly had three funeral homes and a cremation society using that crematory and immediately realized we had to have a system.

Our system involved sending all the paperwork in an interoffice envelope, or a plain brown envelope—something like that. We knew we needed to send

everything to a gatekeeper, and we did.

As soon as I saw the cremation envelope, I think it was in 2006, I said, "That's a best practice I'm putting into use right away." Putting everything in a special envelope with a checklist on the outside took our process up a level in terms of being organized and taking precautions.

What did you change in terms of what's on the checklist, what goes in the envelope?

Lohman: We tweaked it to adhere to Florida law. For instance, in Florida, we can't conduct a cremation until the medical examiner gives us a cremation authorization number that indicates that office has reviewed the death certificate and has no concern about the cause of death. So our form includes a box for "medical examiner cremation approval."

I love systems; I think that's the only way you can run a funeral home and a cremation service and know that you're compliant with regulatory requirements in every respect.

Each one of our locations sends their envelope with all the information required

to one person, Lisa Gunn. She is our gatekeeper, and she works at the funeral home across the street from our crematory. She reviews every single piece of paper, every form, to make sure it's complete.

You don't just check the box—you sign or initial it—so everyone knows who did what. If Lisa has a question about something, she doesn't have to wonder which funeral director to call, or which admin to call, she just looks on the front of the envelope and she knows.

That process has been a real safety net for us, and that's what I love so much about it, the idea that we have one last set of eyes to go over everything. She is familiar with every single aspect of the paperwork required for cremation.

She also checks to make sure any special requests have been taken care of. She then passes on the envelope to Erik Nero, our certified crematory operator, with her OK for cremation.

Along with all the legal requirements, it's just as important for her to make sure that the cremation authorization form includes what type of container the person is to be cremated in and what type of container the remains are to be placed in for return to the family. This is also where any special requests are listed.

So if it says, "Make sure we have a lock of Jane Smith's hair prior to cremation," Lisa stops everything to say, "Do you, Mr. or Ms. Funeral Director, have a lock of Jane Smith's hair?" Or if it says, "Joe Smith has to be cremated with a letter from his granddaughter in his pocket," she stops everything and says, "Is that letter from his granddaughter in his pocket?"

She makes sure we're honoring the family's requests to the very nth degree.

We don't cremate anybody until Lisa has said, "Every single bit of paperwork is done and complete and in this envelope and special requests are taken care of."

She was chosen to do this because she is a good and thorough administrator, and also because she's closest to the crematory. She can call the crematory operator on his cell phone, but she also can just walk across the street. So if we had to stop everything and get that lock of hair, she could do it herself. □