

How To:



USER GUIDE

How to Use the Funeral Home Portal

Funeral Home Portal — Burial Allowance Insurance Tracking System (BAITS)

Table of Contents

Purpose of This Document

This guide shows the different actions a Funeral Home User can perform in BAITS.

Funeral Home — Home Page

 **Funeral Home Portal**

Burial Assistance Information Tracking System

 [Invoices](#)

 [Funeral Home Profile](#)

 [Upload Documents](#)

On your Home Page, you will see links to the following modules:

- Invoices — this module allows you to submit an invoice to OBS for a case.
- Upload Documents — this module allows you to upload files for a case.
- Funeral Home Profile — this module allows you to update your company information.

Invoices

After clicking the "Invoices" link on your Home Page, you will be directed to the following dashboard, where you see all the invoices you have submitted to OBS:

Funeral Home Portal

Invoices

Search My Invoices:

Keyword

Filter By:

Select...

Reset Filters

Apply Filters

1 - 1 of 1

Submit an Invoice

BAITS Claim No.	Decedent	Date of Death	Service Date	Amount	Status	Submitted
BUR-2026-0358	David	3/1/2026	3/15/2026	\$1,000.00	Unpaid	4/6/2026

Use the available search filters to find a specific invoice.

Submit an Invoice

To submit an invoice, click the "Submit an Invoice" button on the dashboard:

Funeral Home Portal
Invoices

Search My Invoices:

Keyword	Filter By:
	Select...

Reset Filters
Apply Filters

1 - 1 of 1

Submit an Invoice

BAITS Claim No.	Decedent	Date of Death	Service Date	Amount	Status	Submitted
BUR-2026-0358	David	3/1/2026	3/15/2026	\$1,000.00	Unpaid	4/6/2026

You will then be directed to the following page:

Funeral Home Portal
Invoices

Submit Funeral Service Invoice

Submit an invoice for burial services rendered. All fields marked with * are required

BAITS Claim Information		
BAITS Claim Number*	Decedent Last Name*	Decedent Date of Death*
Service Information		
Date Services Rendered*	Invoice Amount (\$)*	Payment Status*
		Select...
Applicant Contact Information		
Contact Name	Contact Phone	Contact Email
Digital Signature		
Funeral Director Signature*		

By typing your name, you are electronically signing this invoice submission

Submit Invoice

Clear Form

Cancel Submission

Complete the form:

- BAITS Claim Number [BUR-20XX-XXXX]
- Decedent Last Name — must match the records in BAITS
- Decedent Date of Death — must match the records in BAITS
- Date Services Rendered
- Invoice Amount
- Payment Status

- Applicant Information:

- Contact Name
- Contact Phone
- Contact Email

- Funeral Director Signature

You must complete the form correctly for the invoice to be submitted. Any entries that need correction will show as follows:

Digital Signature
Funeral Director Signature*
<i>By typing your name, you are electronically signing this invoice submission</i>

The Invoice was not submitted because of the following errors:

- > The BAITs Claim Number you entered does not exist.
- > Decedent Last Name is missing.
- > Decedent Date of Death is missing.
- > Invalid Decedent Date of Death input.
- > Service Date is missing.
- > Invoice Amount is missing.
- > Invalid Invoice Amount input.
- > Payment Status is missing.
- > Funeral Director Signature is missing.

- Use the "Clear Form" button to clear your inputs.
- Use the "Cancel Submission" button to cancel your submission and go back to the Invoice Dashboard.

View an Invoice

To view an invoice you previously submitted, click the BAITs Claim Number from the dashboard:

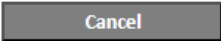
1 - 1 of 1						Submit an Invoice
BAITs Claim No.	Decedent	Date of Death	Service Date	Amount	Status	Submitted
BUR-2026-0358	David	3/1/2026	3/15/2026	\$1,000.00	Unpaid	4/6/2026

You will then be directed to the following page:

Funeral Home Portal		Invoices
Funeral Service Invoice Details		Initially submitted on : 4/6/2026 2:03 AM
BAITS Claim Information		
BAITS Claim Number*	Decedent Last Name*	Decedent Date of Death*
BUR-2026-0358	David	3/1/2026
Service Information		
Date Services Rendered*	Invoice Amount (\$)*	Payment Status*
3/15/2026	\$1,000.00	Unpaid
Applicant Contact Information		
Contact Name	Contact Phone	Contact Email
Digital Signature		
Funeral Director Signature*		
 By typing your name, you are electronically signing this invoice submission		
Invoice Change History		
Date	Sender	Change Description
4/6/2026 2:03 AM	obactin@nycdss.gov	New Invoice Added for BUR-2026-0358: Service Date - 2026-03-15; Amount - 1000; [Paid]
4/6/2026 2:08 AM	obactin@nycdss.gov	Payment Status updated from Paid to Unpaid
  		

- It shows the invoice and its change history.
- To edit the invoice, click the "Edit Invoice" button. The invoice will then change to edit mode, and you can update the details of the invoice.
- To go back to the invoice dashboard, click the "Go Back to Invoice List" button.
- To delete the invoice, click the "Delete Invoice" button. You will be prompted to confirm the deletion:

This Invoice will be permanently deleted. Are you sure you would like to proceed?

Upload Documents

After clicking the "Upload Document" link on your Home Page, you will be directed to the following page:

Upload Documents

Enter the following information to search Claims:

BAITS Burial Claim Number	Decedent Last Name	Date of Death

Search Claims

Enter a BAITS Burial Claim Number, the decedent's last name, and date of death. All three inputs must match the OBS records for you to be able to upload a file for a case.

- If your inputs do not match the records, you will see the following:

Enter the following information to search Claims:

BAITS Burial Claim Number	Decedent Last Name	Date of Death
BUR-2026-0357	DAVID	3/1/2026

Search Claims

No Cases Found:

- > The Decedent Last Name for the BAITS Claim Number you entered does not match our records.
- > The Decedent Date of Death for the BAITS Claim Number you entered does not match our records.

Reset Search

If your inputs match the OBS records, you will see the following:

Enter the following information to search Claims:

BAITS Burial Claim Number	Decedent Last Name	Date of Death
BUR-2026-0358	DAVID	3/1/2026

Search Claims

BAITS Burial Claim Id	Deceased Last Name	Date of Death
<u>BUR-2026-0358</u>	David	3/1/2026

Click the BAITS Burial Claim Number of the case you will be uploading a file for.

You will then be directed to the following page:

[<< Back to Claim Search](#)

 **Upload Documents**

BAITS Burial Claim Id	Deceased Last Name	Date of Death
<u>BUR-2026-0358</u>	David	3/1/2026

No Documents Uploaded yet.

Upload New Document

Click the "Upload New Document" button. The following section will appear:

Upload the documents below:

File Type	File Notes	File
Select... ▼		Click here to attach a file

Upload Document

To use this section to upload a document:

1. Select the File Type from the drop-down menu.

Upload the documents below:

File Type	File Notes	File
Select... ▼ Select... Death Certificate Funeral Bill Funeral Contract		Click here to attach a file

Upload Document

2. Enter any notes regarding the file you are uploading.
3. Click the "Click here to attach a file" button. From the file explorer window that pops up, select a file you would like to upload and click "Open".
4. Click the "Upload Document" button.

a. If your upload is successful, you will see the following confirmation:

DSCF7753.jpeg; 3545kb

Document Uploaded!

View Document List

Upload Another Document

b. If your upload failed, you will see the following warning:

Document Upload Failed.

Please make sure the file you are uploading meets the following criteria:

- accepted file types: .pdf, .png, .jpeg
- Must be less than 10 MB

View Document List

Retry

- Clicking "Upload another Document" or "Retry" will show the section in step 1.
- Click "View Document List" to see your uploads.
- To remove an uploaded document, click the "Delete" button.
 - You will be unable to delete a document once the applicant reviews and accepts your document upload.

List of Documents Uploaded:			
File Type	File Notes	Download Link	
Death Certificate	Picture of Death Certificate [DSCF7753.jpeg]	https://nycdss-...	Delete

Funeral Home Profile

After clicking the "Funeral Home Profile" link on your Home Page, you will be directed to the following page:

Funeral Home Portal			Funeral Home Profile	
Funeral Home Information			 Verified by OBS	
Funeral Home Name				
Test Funeral Home 123				
Street Address	Borough	City	State	Zip Code
111 Test Avenue	Manhattan	New York	NY	10028
Phone Number	Tax Payer Id	State License Number	W9	
(333) 333-3334	82-1231231	12345	Not yet uploaded	
Update Details				
Funeral Home User Information				
First Name	Last Name	Phone	Email	
Odeza	Bactin		obactin@nycdss.gov	
Update Details				

Funeral Home Details

- Click the "Update Details" button under the Funeral Home Information section to update your Funeral Home details:

Funeral Home Portal			Funeral Home Profile	
Funeral Home Information				
Funeral Home Name				
Test Funeral Home 123				
Street Address	Borough	City	State	Zip Code
111 Test Avenue	Manhattan	New York	NY	10028
Phone Number	Tax Payer Id	State License Number	W9	
(333) 333-3334	82-1231231	12345	Click here to attach a file	
Save Changes Cancel				

- Once you have made your updates, click "Save Changes".
- To discard your changes, click "Cancel".

Funeral Home User Details

- Click the "Update Details" button under the Funeral Home User Information section to update your contact information:

Funeral Home User Information			
First Name	Last Name	Phone	Email
Odeza	Bactin		obactin@nycdss.gov
Save Changes		Cancel	

- Once you have made your updates, click "Save Changes".
- To discard your changes, click "Cancel".

How To:



USER GUIDE

How to Use the Funeral Home Database

NYC OBS Staff Portal — Burial Allowance Insurance Tracking System (BAITS)

Version 1.0 | July 2026

Table of Contents

Purpose of This Document

This guide shows the different actions an OBS user can perform in the Funeral Home Database module.

Accessing the Funeral Home Database

Case Worker Portal		Burial Assistance Information Tracking System	
New Application (2)	Upload Documents	Action Items (8)	
My Claims (6)	Help	- BUR-2026-0359 - Incomplete In Person Application - BUR-2026-0347 - Incomplete In Person Application - BUR-2026-0332 - Incomplete Application Evaluation	
Funeral Home Database			

- As a Case Worker or an OBS Supervisor, you can access the Funeral Home Database by clicking the "Funeral Home Database" link on your Home Page.

Funeral Home Database

- After clicking the "Funeral Home Database" link on your Home Page, you will be directed to the following dashboard:

OBS Admin		Funeral Home Database Management	
Unverified Funeral Home Registrations		Funeral Home Database	
Unverified Funeral Home Registrations			
Funeral Home	Funeral Home User	Date Added	
Example Funeral Home 123 Fake Address Manhattan New York NY 99999	John Smith [ode.zaacf@gmail.com]; (999) 999-9999	4/21/2026	

- There are two tabs on this dashboard:
 - Unverified Funeral Home Registrations
 - This is the list of Funeral Homes that registered in the BAITS Funeral Home Portal that have not been reviewed by OBS.
 - Funeral Home Database
 - This is the list of Funeral Homes known to OBS.

Verifying a Funeral Home Registration

- To verify a Funeral Home Registration, on the Unverified Funeral Home Registration tab, click the "Review" button on the Funeral Home Registration that you would like to verify. The following section will show:

Review Unverified Funeral Home Registrations							
BAITS Funeral Home Portal Registrant	NYC DSS Funeral Home Database Search						
Funeral Home Name: Example Funeral Home	Search Filters:						
Street Address: 123 Fake Address	<table border="1"> <thead> <tr> <th>Name</th> <th>Address</th> <th>Tax Payer Id</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td>99-9999999</td> </tr> </tbody> </table>	Name	Address	Tax Payer Id			99-9999999
Name	Address	Tax Payer Id					
		99-9999999					
Borough: Manhattan	Search						
City: New York	Top 10 Most Relevant Results:						
State: NY	No Matches						
Zip Code: 99999	Add to Funeral Home Database						
Phone Number: (999) 999-9999							
Tax Payer Id: 99-9999999							
State License Number:							
W9:							
DSS Ref Code:							
Cancel							

- On the right side is the Funeral Home Profile. On the left side is the Funeral Home Database Search.
- Use the Funeral Home Database Search by using the available search filters, and then click the "Search" button.
 - By default, the Taxpayer Id is used as the search filter.
 - The search only shows the top 10 most relevant results. The search filters stack on top of each other, so use multiple filters to effectively search the database.
 - For example, if you would like to find a Funeral Home in Brooklyn with a "99" in their Taxpayer Id, you would use the following search filters:

NYC DSS Funeral Home Database Search									
Search Filters:									
<table border="1"> <thead> <tr> <th>Name</th> <th>Address</th> <th>Tax Payer Id</th> </tr> </thead> <tbody> <tr> <td> </td> <td>Brooklyn</td> <td>99</td> </tr> </tbody> </table>		Name	Address	Tax Payer Id		Brooklyn	99	Search	
Name	Address	Tax Payer Id							
	Brooklyn	99							
Top 10 Most Relevant Results:									
Funeral Home Name		Address							
Dahill Funeral Home		2525 65th Street Brooklyn NY 11204							
Tax Id	DSS Ref ID	NYC Vendor?							
112199906	1146	No	Select						

- If you find a match in the Funeral Home Database, click the "Select" button on the Funeral Home that matches the registration. This will populate the DSS Ref Code field on the left side:

Review Unverified Funeral Home Registrations		NYC DSS Funeral Home Database Search																																													
BAITS Funeral Home Portal Registrant <table border="1"> <tr><td>Funeral Home Name</td><td>Example Funeral Home</td></tr> <tr><td>Street Address</td><td>123 Fake Address</td></tr> <tr><td>Borough</td><td>Manhattan</td></tr> <tr><td>City</td><td>New York</td></tr> <tr><td>State</td><td>NY</td></tr> <tr><td>Zip Code</td><td>99999</td></tr> <tr><td>Phone Number</td><td>(999) 999-9999</td></tr> <tr><td>Tax Payer Id</td><td>99-9999999</td></tr> <tr><td>State License Number</td><td></td></tr> <tr><td>W9</td><td></td></tr> <tr> <td>DSS Ref Code</td> <td>1146</td> </tr> </table>		Funeral Home Name	Example Funeral Home	Street Address	123 Fake Address	Borough	Manhattan	City	New York	State	NY	Zip Code	99999	Phone Number	(999) 999-9999	Tax Payer Id	99-9999999	State License Number		W9		DSS Ref Code	1146	Search Filters: <table border="1"> <thead> <tr> <th>Name</th> <th>Address</th> <th>Tax Payer Id</th> </tr> </thead> <tbody> <tr> <td></td> <td>Brooklyn</td> <td>99</td> </tr> </tbody> </table> Search Top 10 Most Relevant Results: <table border="1"> <thead> <tr> <th>Funeral Home Name</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>Dahill Funeral Home</td> <td>2525 65th Street Brooklyn NY 11204</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Tax Id</th> <th>DSS Ref ID</th> <th>NYC Vendor?</th> <th></th> </tr> </thead> <tbody> <tr> <td>112199906</td> <td>1146</td> <td>No</td> <td>Select</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Funeral Home Name</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td>Fellowship Funeral Chapels, Inc.</td> <td>203 Euclid Avenue Brooklyn Brooklyn NY 11208</td> </tr> </tbody> </table>		Name	Address	Tax Payer Id		Brooklyn	99	Funeral Home Name	Address	Dahill Funeral Home	2525 65th Street Brooklyn NY 11204	Tax Id	DSS Ref ID	NYC Vendor?		112199906	1146	No	Select	Funeral Home Name	Address	Fellowship Funeral Chapels, Inc.	203 Euclid Avenue Brooklyn Brooklyn NY 11208
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Fellowship Funeral Chapels, Inc.	203 Euclid Avenue Brooklyn Brooklyn NY 11208																																														
Set DSS Ref Code and Verify Cancel																																															

- Click the "Set DSS Ref Code and Verify" button to tie the Funeral Home Registrant to the selected Funeral Home in the Database.
- If you do not find a match, click the "Add to Funeral Home Database" button.

Review Unverified Funeral Home Registrations		NYC DSS Funeral Home Database Search																													
BAITS Funeral Home Portal Registrant <table border="1"> <tr><td>Funeral Home Name</td><td>Example Funeral Home</td></tr> <tr><td>Street Address</td><td>123 Fake Address</td></tr> <tr><td>Borough</td><td>Manhattan</td></tr> <tr><td>City</td><td>New York</td></tr> <tr><td>State</td><td>NY</td></tr> <tr><td>Zip Code</td><td>99999</td></tr> <tr><td>Phone Number</td><td>(999) 999-9999</td></tr> <tr><td>Tax Payer Id</td><td>99-9999999</td></tr> <tr><td>State License Number</td><td></td></tr> <tr><td>W9</td><td></td></tr> <tr> <td>DSS Ref Code</td> <td></td> </tr> </table>		Funeral Home Name	Example Funeral Home	Street Address	123 Fake Address	Borough	Manhattan	City	New York	State	NY	Zip Code	99999	Phone Number	(999) 999-9999	Tax Payer Id	99-9999999	State License Number		W9		DSS Ref Code		Search Filters: <table border="1"> <thead> <tr> <th>Name</th> <th>Address</th> <th>Tax Payer Id</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>99-9999999</td> </tr> </tbody> </table> Search Top 10 Most Relevant Results: No Matches Add to Funeral Home Database		Name	Address	Tax Payer Id			99-9999999
Funeral Home Name	Example Funeral Home																														
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W9																															
DSS Ref Code																															
Name	Address	Tax Payer Id																													
		99-9999999																													
Cancel																															

- You will then be prompted to identify whether the new Funeral Home is an existing NYC Vendor:

Add New Funeral Home to Database

Is the Funeral Home a NYC Vendor?

☒ Yes ☐ No

Add to Database

Cancel

- A Funeral Home that is an NYC Vendor will be paid differently compared to a Funeral Home that is not an NYC Vendor.
- Make your selection and click the "Add to Database" button. A new DSS Ref Code will be automatically generated for the new Funeral Home, and it will be searchable in the Funeral Home Database.

Funeral Home Database Search

- Click the "Funeral Home Database" tab on the dashboard:

OBS Admin
Funeral Home Database Management

Unverified Funeral Home Registrations
Funeral Home Database

Funeral Home Database

Search Filters:

Funeral Home Name	Address	Tax Payer Id	Phone Number	Funeral Home User

☐ show NYC Vendors only

Reset Filters

Apply Filters

1 - 25 of 2247 ▶

Funeral Home Name	Street Address	Borough	City	State	Zip Code
A Azzara Funeral Home Inc	183 Sand Lane	Staten Island	Staten Island	NY	10305

Phone Number	Tax Payer Id	Is NYC Vendor?	DSS Id	DSS Ref Code	Funeral Home User
7187271440	132571269	No	1651	2745	

Funeral Home Name	Street Address	Borough	City	State	Zip Code
A New York Burial & Cremation Center	28 Eltingville Boulevard	Staten island	Staten island	NY	10312

Phone Number	Tax Payer Id	Is NYC Vendor?	DSS Id	DSS Ref Code	Funeral Home User
7189482400	200934340	No	1695	1010	

- Use the available search filters to look for a specific Funeral Home in the database to view its details.
- The search filters stack on top of each other, so use multiple filters to effectively search the database.

- For example, if you would like to find a Funeral Home in Brooklyn with a "99" in their Taxpayer Id, you would use the following search filters:

OBS Admin

Funeral Home Database Management

Unverified Funeral Home Registrations

Funeral Home Database

Funeral Home Database

Search Filters:

Funeral Home Name	Address	Tax Payer Id	Phone Number	Funeral Home User
	Brooklyn	99		

☐ show NYC Vendors only

Reset Filters

Apply Filters

1 - 13 of 13

Funeral Home Name	Street Address	Borough	City	State	Zip Code
Dahill Funeral Home	2525 65th Street		Brooklyn	NY	11204
Phone Number	Tax Payer Id	Is NYC Vendor?	DSS Id	DSS Ref Code	Funeral Home User
7183362900	112199906	No	1143	1146	

Funeral Home Name	Street Address	Borough	City	State	Zip Code
Fellowship Funeral Chapels, Inc.	203 Euclid Avenue	Brooklyn	Brooklyn	NY	11208
Phone Number	Tax Payer Id	Is NYC Vendor?	DSS Id	DSS Ref Code	Funeral Home User
7188725097	900199583	No	1606	2692	

Funeral Home Name	Street Address	Borough	City	State	Zip Code
Funeraria Juan-John's Funeral Home, LLC	509 Liberty Avenue	Brooklyn	Brooklyn	NY	11207
Phone Number	Tax Payer Id	Is NYC Vendor?	DSS Id	DSS Ref Code	Funeral Home User
7188271515	200239968	Yes	1311	1265	