



APPRENTICE FUNERAL DIRECTOR CASE REPORT AND EVALUATION FORM

Apprentices must use this form to report apprentice funeral director activities completed for each renewal period. Reports must be submitted annually for not less than the required term of apprenticeship. We recommend that you keep a copy for your records. You must submit evaluation reports prior to changing supervisors.

Name	Firm Name
Phone	Email
Report Period _____, 20____ to September 30, 20____	

Qualifying activities you may report toward your apprenticeship are:

1. Complying with ethical standard of Funeral Service practices
a) Exhibit professional attitude and dress
b) Maintain awareness of changes in funeral service law
c) Comply with laws, rules, and regulations governing funeral service
d) Maintain appropriate certification
e) Maintain confidentiality of information

2. Demonstrate proper telephone and email etiquette
a) Answer the telephone in a positive and factual manner
b) Receive initial notification of death

3. Transfer of remains from place of death to the funeral home to initiate disposition
a) Show proper use of removal equipment
b) Wear protective equipment and observes universal precautions during removal
c) Obtain the identity of remains/ place identification on remains
d) Comply with embalming/refrigeration regulations

4. Arrangement conference
a) Observe funeral arrangements
b) Conduct arrangement conference
c) Contact person with right of disposition to schedule arrangement conference
d) Gather vital statistic information
e) Compose obituary/death notice
f) Obtain authorizations for embalming, cremation, release etc.
g) Obtain burial transit permit
h) Complete insurance forms, Social Security Statement of Death
i) Complete veteran flag application, headstone/marker and burial benefits forms

	j) Gather and document information regarding the care of the deceased for disposition and /or presentation, such as clothing, jewelry, makeup/hair
	k) Obtain certified copies of death certificate
	l) Plan and coordinate service and disposition details

	5. Federal Trade Commission Funeral Rule
	a) Present and explain a general price list
	b) Present and explain a casket price list
	c) Present and explain an outer burial container price list
	d) Present and discuss merchandise options (caskets, outer burial containers)
	e) Complete and explain a statement of funeral goods and services selected

	6. Visitation
	a) Assist with visitation
	b) Receive and arrange flowers
	c) Arrange viewing room

	7. Funeral/Graveside/Memorial Service
	a) Assist with funeral/graveside/memorial service
	b) Coordinate funeral service participants (clergy, military, etc.)
	c) Arrange funeral procession, limousines, escorts, transportation, etc.
	d) Arrange casket/urn
	e) Prepare and present honorariums and gratuities
	f) Assist with ceremonial rites (committal services, graveside, immediate burials, etc.)
	g) Conclude service and dismiss attendees
	h) Confirm identity of decedent prior to disposition

	8. Cremation
	a) Confirm identity of deceased prior to cremation
	b) Document and remove jewelry and other personal effects as instructed
	c) Obtain consent to remove implanted devices
	d) Confirm implanted medical devices have been removed
	e) Place deceased in state required combustible container
	f) Return cremated remains as directed by the authorizing agent

	Name of Deceased	Date	List one activity performed on each case	Signature of supervisor providing training
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