1   Table of Contents

How to Use VitalChek Product Suite

2 How to Search for Orders

How to Search for Orders   Orders can be searched using the **Search Order** screen

Step 1   From the **Orders** menu, select **Order Search**

Step 2   **Search Order** screen is displayed

Step 3   Orders may be searched by

- Bill to Name
- Ship to Name
- Card Type -Type of credit card
- Last 4 - **Last 4** numbers on credit card
- Order Number
- Search Days
- Reference #
- Email

- Auth Number
- Bill to Phone (10 digit phone number required)
- Advanced Criteria (at least 1 **Search Order** field is required in addition to **Advanced Criteria**)

Step 4 Click **Search** button to search
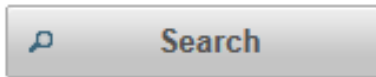
Step 5 Search results are displayed in the search grid. **Export** button is enabled allowing user to export search results

Step 6 Click on underlined **Order Number** to view order in **Order Details** screen

Note Search results can be exported to excel by clicking the **Export** button.

Results are displayed in an Excel spreadsheet and can be saved or printed

3 How to Search for Orders Using Advanced Criteria

How to Search for Orders Using Advanced Criteria Order Search	Orders may be searched using **Advanced Search Criteria.** **Advanced Criteria** can only be used when at least one type of other search criteria is entered

Step 1 Select at least one of the **Advanced Criteria** items to search by

Step 2 Click **Search** button

Step 3   Search results are displayed. Click on highlighted **Order Number** to view order in **Order Details** screen

Note   Search results can be exported to excel by clicking the **Export** button.

Results are displayed in an Excel spreadsheet and can be saved or printed

4   How to Export Search Results

How to Export Search Results	Search results may be exported into an Excel file and/or saved.
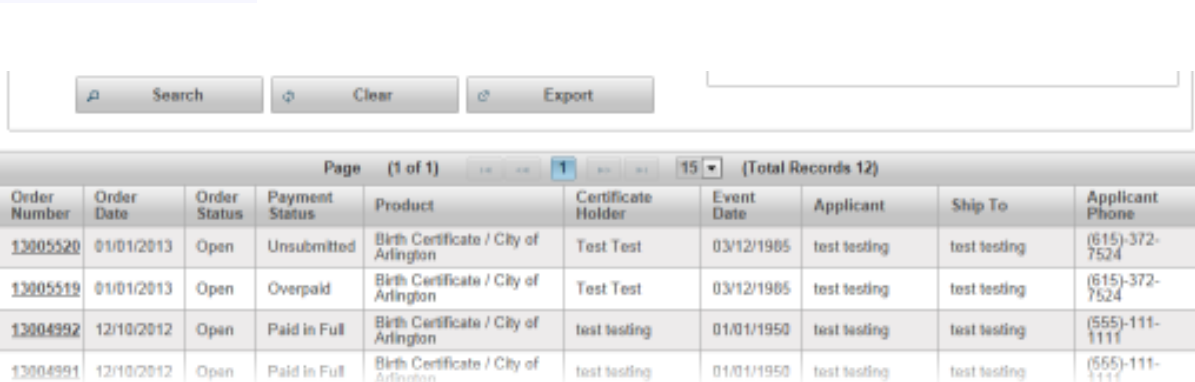
 Note: To export search results when using Internet Explorer 9, please review **Accessing VPS (on-line documentation)**

Step 1	After search results have been displayed, click **Export** button
Step 2	**Order Search Results** box opens
Step 3	Choose **Open with**, **Save File** and/or **Do this automatically** options
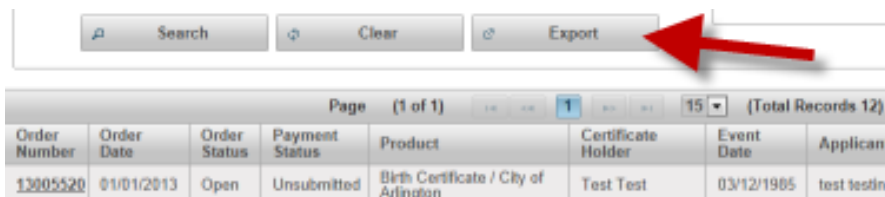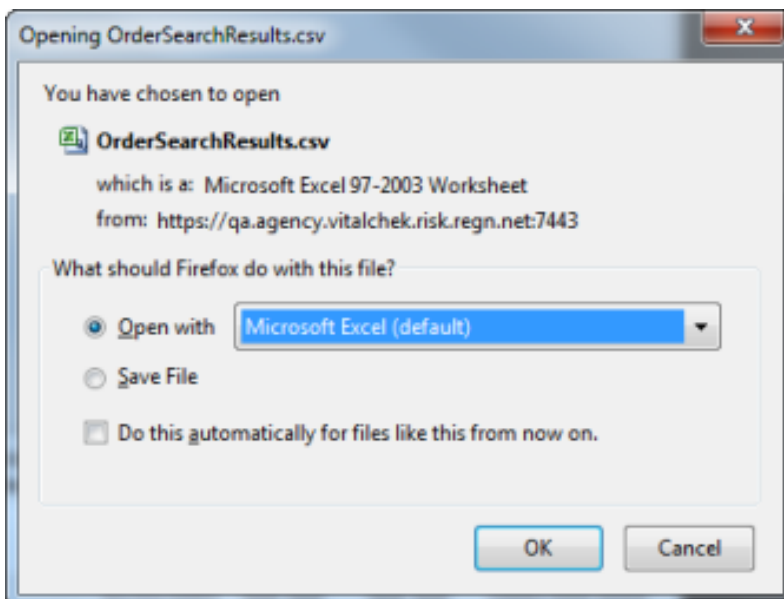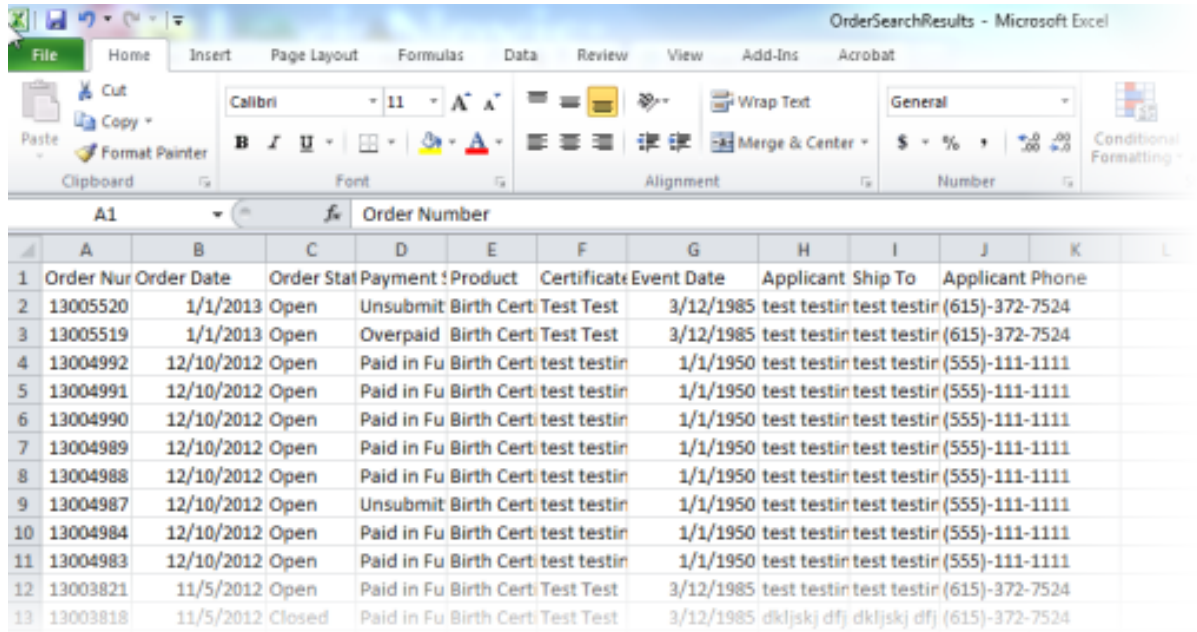
Step 4   Click **OK** to submit selection

Step 5   Order is displayed in Excel (for **Open with** option) or saved (for **Save File** option)

5   How to Use Quick Search

Quick Search	Allows orders to be searched by the order number or the Client ID (Agency specific order identification number)
	Quick Search [_____] 🔍 Client ID [_____] 🔍

Step 1	Enter VPS order number into **Quick Search** box or the Client ID in the **Client ID** field Quick Search [_____] 🔍 Client ID [_____] 🔍
Step 2	Click magnifying glass icon 🔍
Step 3	Search results are displayed in **Order Details** screen

6   How to Enter Product Information

How to Enter Product Data	Product information is entered in the **Order Details** section from the **Orders-Create** menu item

---

Step 1	From the **Orders** menu, select **Create**
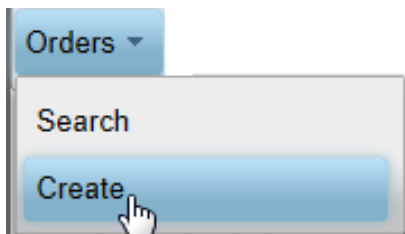
Step 2	The **Order Details** tab displays

Step 3	Choose the item for payment from the **Select New Product** drop down selection and click the **Add** button.

Note - Agencies that offer only 1 product will default to the available product.

Step 3	The product information box will display

Traffic Citation

Product Information

Amount	
Citation Number	
Citation First Name	
Citation Last Name	
Citation Date	

OK   Cancel

Step 4   Enter the **Amount** of the payment

Amount

Step 5   Enter all data fields as required by product and agency

Note - agencies that offer a split tax option will enter the tax amount and non-tax amounts

Auto w/Tax

Product Information

Title/Plate Number	
Tax Amount	
Non-Tax Amount	

OK   Cancel

Step 6   Click **OK** button to add Product information to order

OK

7   Split Tax

| **Split Tax** | Agencies that allow Split Tax payments take them by entering the "tax" and "non-tax" amount. Due to Visa regulations, a convenience fee is not allowed to be charged directly to a consumer for an in-person, non-tax, credit transaction.

This restriction also includes debit cards that are on the "Interlink" network, which most Visa debit cards operate on.

Agencies with a "tax" product may accept all types of credit cards for an in-person transaction as the convenience fee will only be charged on the tax portion of the transaction.

Agencies that offer split tax payments will display differently on the POS receipts and in VPS. |
|---|---|

POS Receipts	POS receipts for Split Tax agencies display 3 lines (**Tax Amount**, **Non Tax Amount** and **VitalChek Convenience Fee**):

Payment Services Demo

P. O. Box 1703

Brentwood, TN 37024-1703
(615) 372-1234

Terminal ID: 117
Date / Time: 1/23/12 3:51 PM CST
Confirmation #:27869437

Card #:   ***********1112
Transaction Type: Payment $4.00
Payment Type: Credit
Card Type: AMEX

Card #:   ***********1112
Transaction Type: Payment $1.50
Payment Type: Credit
Card Type: AMEX

Card #:   ***********1112
Transaction Type: Payment $5.00
Payment Type: Credit
Card Type: AMEX

Auto with Tax

12345A

Tax Amt: 1.50
Non Tax Amt: 5.00
              Agency Amount: $6.50
      VitalChek Convenience Fee: $4.00

                  Total Fee: $10.50

X--
NA NA
                  Agency Copy

VPS   Split tax payments display on 3 lines in VPS:

#	Type	Amount	Card/Acct	Last Name	First Name	Status		
1	CC	1.65	MC 0248	testing	test	Authorized	🔍	✏️
2	CC	55.00	MC 0248	testing	test	Authorized	🔍	✏️
3	CC	20.00	MC 0248	testing	test	Authorized	🔍	✏️

Note - Voiding the payment of a single line on the split tax payment will void all 3 lines.

8 How to Enter Shipping Data

How to Enter Shipping Data	Shipping information, including shipping method and address, is in the **Shipping** section. Required fields are highlighted in yellow.
	Note - Some Shipping fields may pre-populate based on Agency requirements

Shipping

Select Shipping Method	[▾]		Signature Required [ ]
First Name [ ]	Address Type	Domestic [▾]	City [ ]
Middle Name [ ]	Zip Code [ ]		State [▾]
Last Name [ ]	Address 1 [ ]		Country	United States of Amer [▾]
Suffix [▾]	Address 2 [ ]		Phone [ ] [ ]
Email [ ]			

Step 1	Select **Shipping Method** from drop down list of available types of delivery methods

Select Shipping Method [▾]

Signature Required check box indicates that a signature is required at the time the certificate is delivered. Will be pre populated based on agency required

Step 2	Enter **First Name** of the person the order ships to

First Name [ ]

Step 3	Enter **Middle Name** of the person the order ships to

Middle Name [ ]

Step 4	Enter **Last Name** of the person the order ships to

Last Name [ ]

Step 5	Select **Suffix** of the person the order ships to from drop down list

Suffix [▾]

Step 6	Select address type from drop down (**Domestic, International, Military**)

Address Type Domestic [▾]

Step 7	Enter **Zip Code** of shipping address. The Zip Code entered will automatically populate the **City** and **State** fields

Zip Code [ ]

How to Use VitalChek Product Suite

Step 8   Enter shipping street **Address**

Address 1 [ ]

Step 9   If necessary, enter additional shipping **Address** information

Address 2 [ ]

Step 10   Enter shipping **City** if not correct from **Zip Code** entry (step 8)

City [ ]

Step 11   Enter shipping **State** if not correct from **Zip Code** entry (step 8)

State [▼]

Step 12   **Country** defaults and locks on United States for **Domestic** orders (step 7). orders that ship to an **International** address will need a **Country** selected from the drop down list

Country [▼]

Step 13   Enter email address if required

Email [ ]

Step 14   Enter 10 digit **Phone** number of person the order is shipped to

Phone [ ] [ ]

9 How to Enter Payment with a Personal Check (electronic)
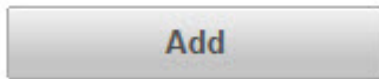
How to Enter Payment with a Personal Check	The Payment line is accessed from the **Orders** -**Create** menu item, **Order Details** tab. The **Payment** line expands to allow user to enter payment information

Payment

Same As Shipping ☐

Disclaimer

The Customer authorizes the Merchant (LexisNexis Payment Solutions) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of $30.00 or as allowable by law may be charged to their account via draft or EFT.

Once this request is completed, it cannot be cancelled because the funds are guaranteed. If the customer has any questions regarding this authorization, they may contact Customer Service at 866-255-1857.

☐ Click here to indicate that the caller has been informed of the above disclaimer

Routing No.		Account No.		Check Number	
Routing No. Conf		Account No. Conf		Check No. Conf	
Drivers License No.		Issuing State	▾	Date of Birth	
SSN					

First Name		Address Type	Domestic ▾	City	
Middle Name		Zip Code		State	▾
Last Name		Address 1		Country	United States of Ame ▾
Suffix	▾	Address 2		Phone	
Email					

[OK]   [Cancel]

Step 1	Select **Personal Check** from **Select New Payment** drop down.
	Note - Agencies that offer only 1 payment type default to that available payment type.

Payment   [−]

Select New Payment [_____ ▾]   [Add]

#	Type	Amount		First Name	Status		

Credit Card
Personal check (Electronic)
Business check (Electronic)

Step 2	Click **Add** button

How to Use VitalChek Product Suite

Step 3   **Payment** screen for Check selection is displayed

Step 4   Check **Same as Shipping** if the person making the payment is the same as the person placing the order. *Checking Same as Shipping will populate name and address information.*

Note - If agency offers a Multiple/Partial Payments option, check box will

Step 5   Check **Disclaimer Confirmation** box indicating the caller has been informed of the Disclaimer

Step 6   Enter **Routing No.** (number) of the checking account used for payment

Routing No.

Step 7 Reenter **Routing No.** (**Conf**.) for confirmation of the checking account routing number used for payment

Routing No. Conf

Step 8 Enter **Drivers License No.** (number) of the person who is making payment (using their checking account)

Drivers License No.

*Note - **SSN** (Social Security Number) of the person making payment on the order (checking account holder) may be required based on Agency*

SSN

Step 9 Enter **Account No.**of the checking account used for payment

Account No.

Step 10 Renter **Account No.** (Confirmation) of the checking account used for payment

Account No. Conf

Step 11 Select the state where the Drivers License was issued from using the **Issuing State** drop down selection

Issuing State

Step 12 Enter **Check Number** of the check used for payment

Check Number

Step 13 Reenter **Check No**. (**Conf**) of the check used for payment

Check No. Conf

Step 14 Enter **Date of Birth** of person making the payment (checking account holder)

Date of Birth

Step 15 Complete all name and address fields.

*Note - clicking to select **Same as Applicant** or **Same as Shipping** will populate address fields*

Step 16 Enter **First Name** of person making payment on the order (checking account holder)

First Name [   ]

Step 17   Enter **Middle Name** of person making payment on the order (checking account holder)

Middle Name [   ]

Step 18   Enter **Last Name** of person making payment on the order (checking account holder)

Last Name [   ]

Step 19   Select **Suffix** of the person making payment on the order (checking account holder)

Suffix [▼]

Step 20   Enter the **Email** address of the person making payment on the order (checking account holder)

Email [   ]

Step 21   Enter **Address Type** of the person making payment on the order (checking account holder)

Address Type [Domestic ▼]

Step 22   Enter **Zip Code** of the person making the payment on the order (checking account holder)

Zip Code [   ]

Step 23   Enter **Street Address** of the person making payment on the order (checking account holder)

Address 1 [   ]

Step 24   Enter additional **Street Address** of the person making payment on the order (checking account holder)

Address 2 [   ]

Step 25   Enter **City** of the person making the payment on the order (checking account holder)

City [   ]

Step 26   Enter **State** of the person making the payment on the order (checking account holder)

State [▼]

Step 27   Enter **Country** of the person making the payment on the order (checking account holder). Note - this defaults to United States of America

Country [▼]

Step 28   Enter 10 digit **Phone** number of person making payment on the order (checking account holder)

Phone [   ] [   ]

Step 29   Click **OK** button

OK

Step 30   Check payment confirmation is displayed

#	Type	Amount	Card/Acct	Last Name	First Name	Status	County		
1	PC	0.00	1111	testing	test		Robertson	🗑	✏

Select New Payment Personal check (Electronic) ▾   Add

Step 31   **Authorize Payment** button will display, click to authorize payment

Fee Data

Agency	8.00
Expedite	5.00
Misc	0.00
VitalChek	10.00
Shipping	16.50
Other	0.00
Total	39.50

Update/Save

Authorize Payment

Cancel Order

Copy

☐ Copy Auth

Step 32   Order is authorized and the following is displayed:

How to Use VitalChek Product Suite

Authorized message appears:

Payment **Status** changes to **Paid in Full:**

Payment information in Status section displays **Authorized**

10 How to Enter Payment with a Business Check (electronic)

How to Enter Payment with a Business Check	The Payment line is accessed from the **Orders** -**Create** menu item, **Order Details** tab. The **Payment** line expands to allow user to enter payment information

---

Step 1 Select **Business Check** from **Select New Payment** drop down.

Note - Agencies that offer only 1 payment type default to that available payment type.

Step 2 Click **Add** button

Step 3 **Payment** screen for Check selection is displayed

Step 4   Check **Same as Shipping** if the person making the payment is the same as the person placing the order. *Checking Same as Shipping will remove name and address information from screen.*

Step 5   Check **Disclaimer Confirmation** box indicating the caller has been informed of the Disclaimer

Step 6   Enter **Routing No.** (number) of the business checking account used for payment

Step 7   Reenter **Routing No.** (**Conf**.) for confirmation of the checking account routing number used for payment

Step 8   Enter **Account No.** of the checking account used for payment

Account No. [   ]

Step 9   Reenter **Account No** (**Conf.**)of the business checking account used for payment

Account No. Conf [   ]

Step 10   Enter **Check Number** of the check used for payment

Check Number [   ]

Step 11   Reenter **Check No**. (**Conf**) of the check used for payment

Check No. Conf [   ]

Step 12   Enter the **Business Account Name** of the business listed on the check

Business Acct Name [   ]

Step 13   Enter the **Business Phone Number** of the business listed on the check

Business Phone No. [   ]

Step 14   Enter the **Email** address of the person making payment on the order (checking account holder)

Email [   ]

Step 15   Enter **Address Type** of the business making payment on the order (business checking account)

Address Type [Domestic ▼]

Step 16   *Enter Zip Code of the business making the payment on the order (business checking account)*

Zip Code [   ]

Step 17   Enter **Street Address** of the business making payment on the order (business checking account)

Address 1 [   ]

Step 18   Enter additional **Street Address** of the business making payment on the order (business checking account)

Address 2 [   ]

How to Use VitalChek Product Suite

Step 19   Enter **City** of the business making the payment on the order (business checking account)

City

Step 20   Enter **State** of the business making the payment on the order (business checking account)

State

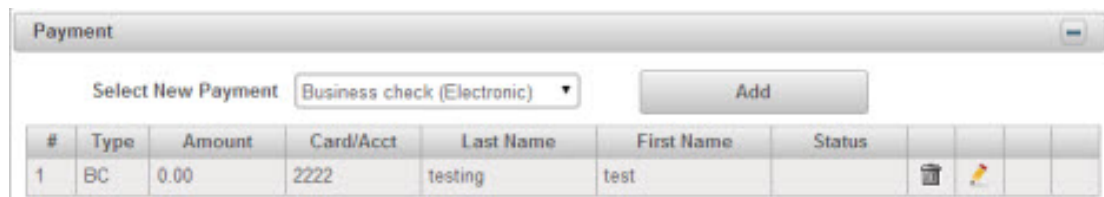**Step 21**   Enter **Country** of the business making the payment on the order (business checking account)

Country

Step 22   Enter 10 digit **Phone** number of business making payment on the order (business checking account)

Phone

Step 23   Click **OK** button

OK

Step 24   Check payment information is displayed

Payment								⊟
Select New Payment	Business check (Electronic) ▾		Add					
#	Type	Amount	Card/Acct	Last Name	First Name	Status		
1	BC	0.00	2222	testing	test		🗑	✎

Step 25   **Authorize Payment button will display, click to authorize payment**

Step 26   Order is authorized and the following is displayed:

Authorized message appears:

Payment **Status** changes to **Paid in Full:**

Payment information in Status section displays **Authorized**

11   How to Enter Payment with a Credit Card

How to Enter Payment with a Credit Card	Credit Card payment information displays in the **Payment** section

Step 1	Select **Credit Card** from **Select New Payment** drop down.
	Note - Agencies that offer only 1 payment type default to that available payment type.
Step 2	Click **Add** button
Step 3	**Payment** screen is displayed for credit card payments

Step 4   Check **Same as Shipping** if the person making the payment is the same as the person placing the order. *Checking* **Same as Shipping** *will remove name and address information from screen.*

Step 5   Enter Credit **Card No**. (number)

Step 6   Enter credit card **Expiration Date** (MM/YYYY)

Step 7   Complete all name and address fields.

Note - clicking to select **Same as Shipping** *will populate address fields*

Step 8   Enter **First Name** of person making payment on the order (credit card holder)

Step 9   Enter **Middle Name** of person making payment on the order (credit card holder)

Step 10   Enter **Last Name** of person making payment on the order (credit card holder)

Step 11   Select **Suffix** of the person making payment on the order (credit card holder)

Step 12   Enter **email** of the person making the payment on the order

Email

Step 13 Enter **Address Type** of the person making payment on the order (credit card holder)

Address Type Domestic

Step 14 Enter **Zip Code** of the person making the payment on the order (credit card holder)

Zip Code

Step 15 Enter **Street Address** of the person making payment on the order (credit card holder)

Address 1

Step 16 Enter additional **Street Address** of the person making payment on the order (credit cardholder)

Address 2

Step 17 Enter **City** of the person making the payment on the order (credit card holder)

City

Step 18 Enter **State** of the person making the payment on the order (credit card holder)

State

Step 19 Enter **Country** of the person making the payment on the order (credit card holder)

Country

Step 20 Enter 10 digit **Phone** number of person making payment on the order (credit card holder)

Phone

Step 21 Click **Add** button

Add

Step 22 Credit card payment information is displayed

Payment							
Select New Payment	Credit Card			Add			

#	Type	Amount	Card/Acct	Last Name	First Name	Status	County		
1	CC	0.00	MC 0248	testing	test		Hill	🗑	✏

Step 23 **Authorize Payment** button will display, click to authorize payment

Step 24 Order is authorized and the following is displayed:

Authorized message appears:

Payment **Status** changes to **Paid in Full:**

Payment information in Status section displays **Authorized**

12   How to Edit a Payment

How to Edit a Payment	Users can change information about the payment using the Edit Payment process.
	*Note - Only orders that have a payment status of **Unsubmitted** may be edited.*

Step 1   From the Payment section in the Order Details tab, click the pencil icon to edit the payment

Step 2   Edit Payment box opens with the original payment information displayed

Credit Card

Check (Personal)

Payment

Same As Shipping ☐

Disclaimer
The Customer authorizes the Merchant (VitalChek) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of $25.00 or as allowable by law may be charged to their account via draft or EFT.

✔ **Click here to indicate that the caller has been informed of the above disclaimer**

Routing No. ****9999	Account No. ******111111	Check Number 111
Routing No. Conf ****9999	Account No. Conf ******111111	Check No. Conf 111
Drivers License No. *********	Issuing State TN ▼	Date of Birth *********
SSN		

First Name test	Address Type Domestic ▼	City East Syracuse
Middle Name	Zip Code 13057	State NY ▼
Last Name testing	Address 1 12 Any St	Country United States of Amer ▼
Suffix ▼	Address 2	Phone (555) 55-55555
Email test@vitalchek.com		

OK   Cancel

Check (Business)

Payment

Same As Shipping ☐

Disclaimer
The Customer authorizes the Merchant (VitalChek) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of $25.00 or as allowable by law may be charged to their account via draft or EFT.

✔ **Click here to indicate that the caller has been informed of the above disclaimer**

Routing No. 999999999	Account No. 111111111	Check Number 111
Routing No. Conf 999999999	Account No. Conf 111111111	Check No. Conf 111

|		
Business Acct Name test testing	Address Type Domestic ▼	City East Syracuse
Business Phone No. (555)555-5555	Zip Code 13057	State NY ▼
	Address 1 12 Any St	Country United States of Amer ▼
	Address 2	Phone (555)555-5555
Email test@vitalchek.com		

OK   Cancel

Step 3   User makes necessary changes

Step 4   Click **OK** to save changes and return to **Order Details** screen

Step 5   **Authorize Payment** button will display.
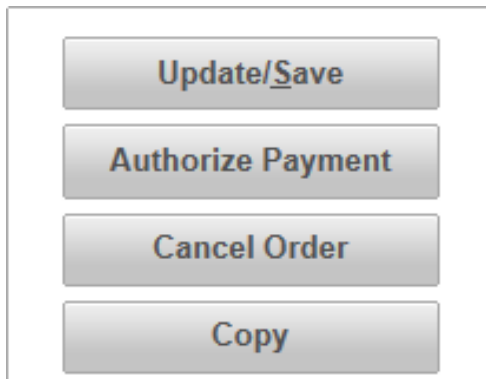
Step 6   Click **Authorize Payment** to process the payment

Step 7   Order authorized message appears, payment **Status** changes to **Authorized** and Payment information in Status section displays **Paid in Full**
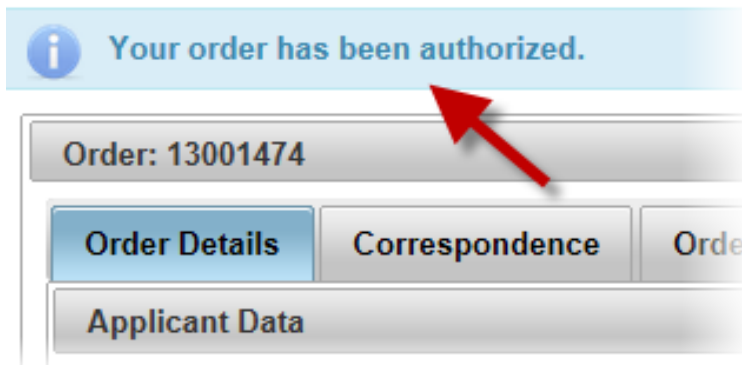
13   How to Void a Payment

How to Void a Payment	Orders that have been "**Paid in Full**" can be voided until closeout process has been complete.
	Note - Agencies that allow Agency Initiated Credits are able to refund payment on an order AFTER the closeout process is complete. See **How to Issue Credits After Closeout ('How to Issue Credits After Closeout (Agency Initiated Credits)' in the on-line documentation)**

Step 1   View the order to be voided in one of the **Order Create** tabs (**Order Details, Order Summary,** or **Comments)**

Step 2   Click the **Void** button

*Note - Based on agency requirements, a **Void Comment** dialog box may appear; enter the reason for the void and press **OK***
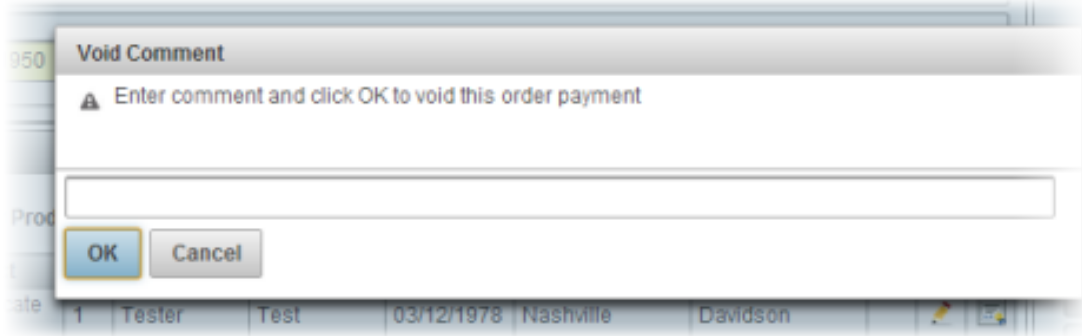
Step 3 Order is voided and **Payment Status** changes to **Refunded**

14   How to Add Comments to an Order

How to Add Comments to an Order	Comments are added to an order in the Comments section, from the Comments tab

Order: 13001317

Order Details	Correspondence	Order Summary	**Comments**

	Comment Date	User	Visibility	Comment
🖼	03/03/2013 09:46 AM CST	Allison K.	Public	This order was copied to create order 1300166-

Full Comment Text

This order was copied to create order 13001664

New Comment

Make this comment public ☐   Add New Comment
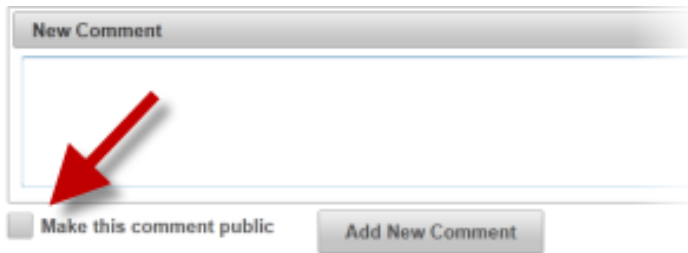
Step 1   Enter comment text in the **Add New Comment** box

New Comment

☐ Make this comment public   Add New Comment

Step 2   Check the **Make this comment public** to allowVitalChek staff to view comment, or leave unchecked to keep comment only viewable by agency staff
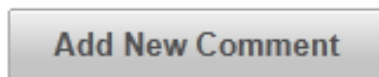
How to Use VitalChek Product Suite
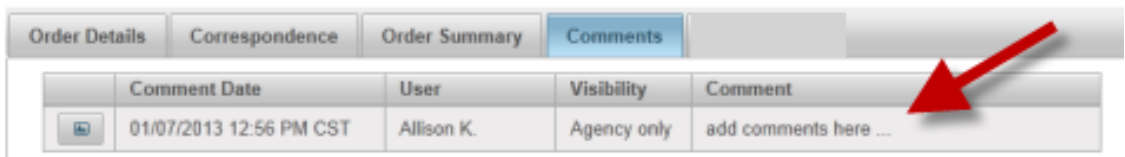
Step 3   Click **Add Comment** button to add comment to order

Add New Comment
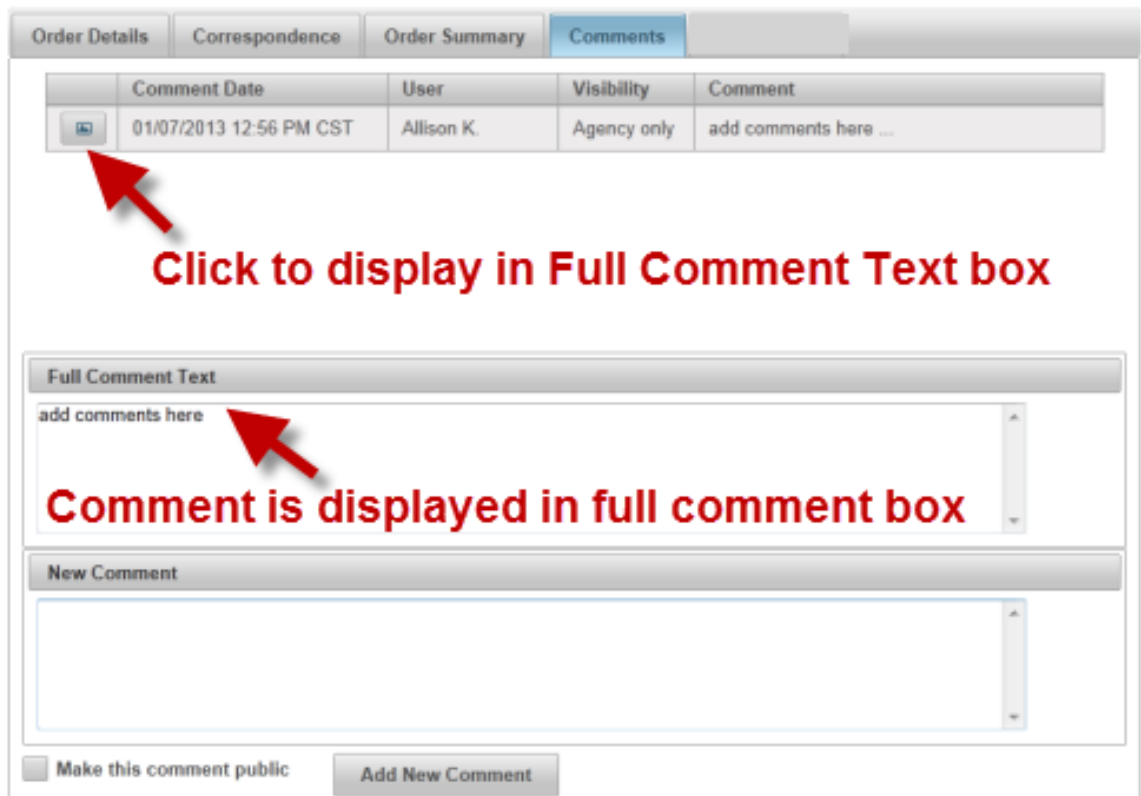
Step 4   Comment details will be displayed in the comment information box

	Comment Date	User	Visibility	Comment
	01/07/2013 12:56 PM CST	Allison K.	Agency only	add comments here ...

Step 5   Click on line item in comment information box to display the complete comment in **Full Comment Text** box

	Comment Date	User	Visibility	Comment
	01/07/2013 12:56 PM CST	Allison K.	Agency only	add comments here ...

Click to display in Full Comment Text box

Full Comment Text

add comments here

Comment is displayed in full comment box

New Comment

15   How to View Comments

How to View Comments

Comments are viewed in the Comments section, from the **Comments** tab

Order: 13001317

| Order Details | Correspondence | Order Summary | **Comments** |

	Comment Date	User	Visibility	Comment
🖼	03/03/2013 09:46 AM CST	Allison K.	Public	This order was copied to create order 1300166-

Full Comment Text

This order was copied to create order 13001664

New Comment

Make this comment public ☐   Add New Comment

Step 1   From the **Orders** Section, with Order displayed, click **Comment** tab. Details on the comments that have been added to the order will be displayed in the Comment **Created** box

Step 2 Click on the image icon to display comment

Step 3 Full text comment will be displayed in the **Full Comment Text** box

16   How to Cancel an Order

How to Cancel an Order	Orders can be cancelled at any time (prior to the end of day closeout process) until they have been paid. Once an order has a paid-in-full status, the payment must be voided, and then the order can be cancelled.
	Note - Agencies that allow Agency Initiated Credits are able to refund payment on an order AFTER the closeout process is complete. See **How to Issue Credits After Closeout ('How to Issue Credits After Closeout (Agency Initiated Credits)' in the on-line documentation)**

Step 1   View the order to be **Cancelled** in one of the **Order Create** tabs (**Order Details, Order Summary, or Comments**)

Step 2   Click the **Cancel Order** button
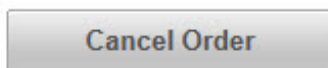
Step 3   Cancel Order message is displayed. Click **OK** to confirm.
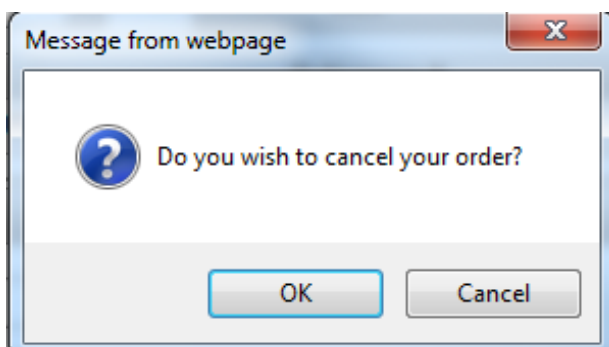
Step 4 | Order is cancelled and **Order Status** changes to **Cancelled**

Status

Order	Cancelled
Payment	Refunded

17   How to Reinstate a Cancelled Order

How to Reinstate a Cancelled Order	Orders that have been cancelled can be reinstated

Step 1   View the **Cancelled** order in one of the **Order Create** tabs (**Order Details, Order Summary,** or **Comments**)

Step 2   Click the **Reinstate Order** button

Step 3   Order is reinstated, **Order Status** changes to **Open** and **Authorize Payment** button is displayed.

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18   How to Print Batch Receipts

How to Print Batch Receipts	Contains sections on **Date Range.** Users must have a role of **Clerk, Supervisor** or **Manager** to be able to view and access **Batch Receipts**

Step 1	From the **Fulfillment** menu, select **Batch Receipts.** Opens on **Create Receipt** tab

Step 2	Select **Start Date,** or date to begin to search for receipts. Defaults to current date

Step 3	Select **End Date,** or date to end search for receipts. Defaults to current date

Step	Click **Create Receipts** button

4

*Note - Once the user has clicked the **Create Receipts** button, the **Date Range** fields will be locked and may only be changed after clicking the **Clear** button to clear the selections*

Step 5   **Batch Receipts** are created and confirmation message displays. **Create Receipts** button is replaced with **Print** button and Date Range criteria is grayed out and uneditable

Click **Print** button to display receipt in .pdf window
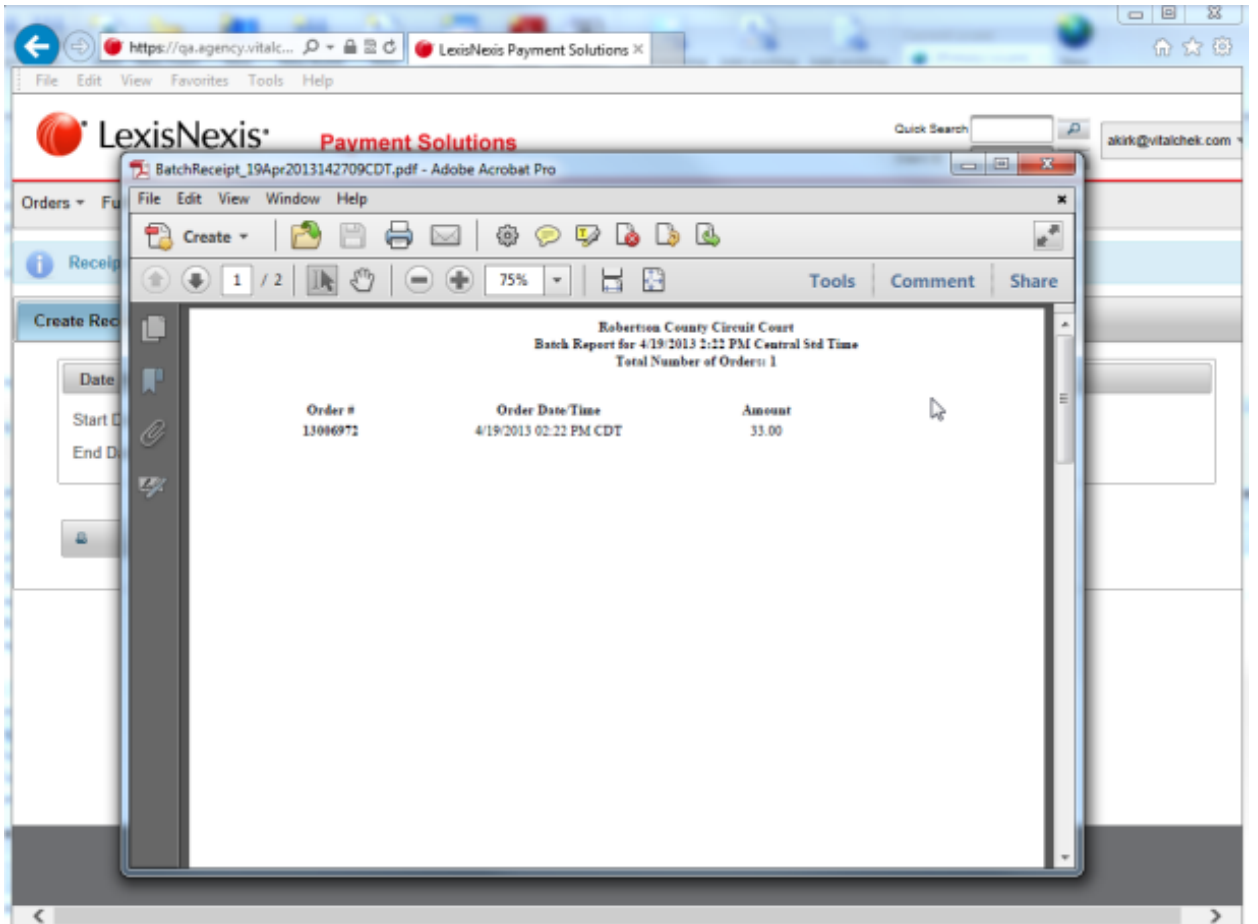
Scroll down to view entire receipt

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Step 6	Print Batch Receipts by clicking on printer icon
Step 7	Click red X to close out of the .Pdf
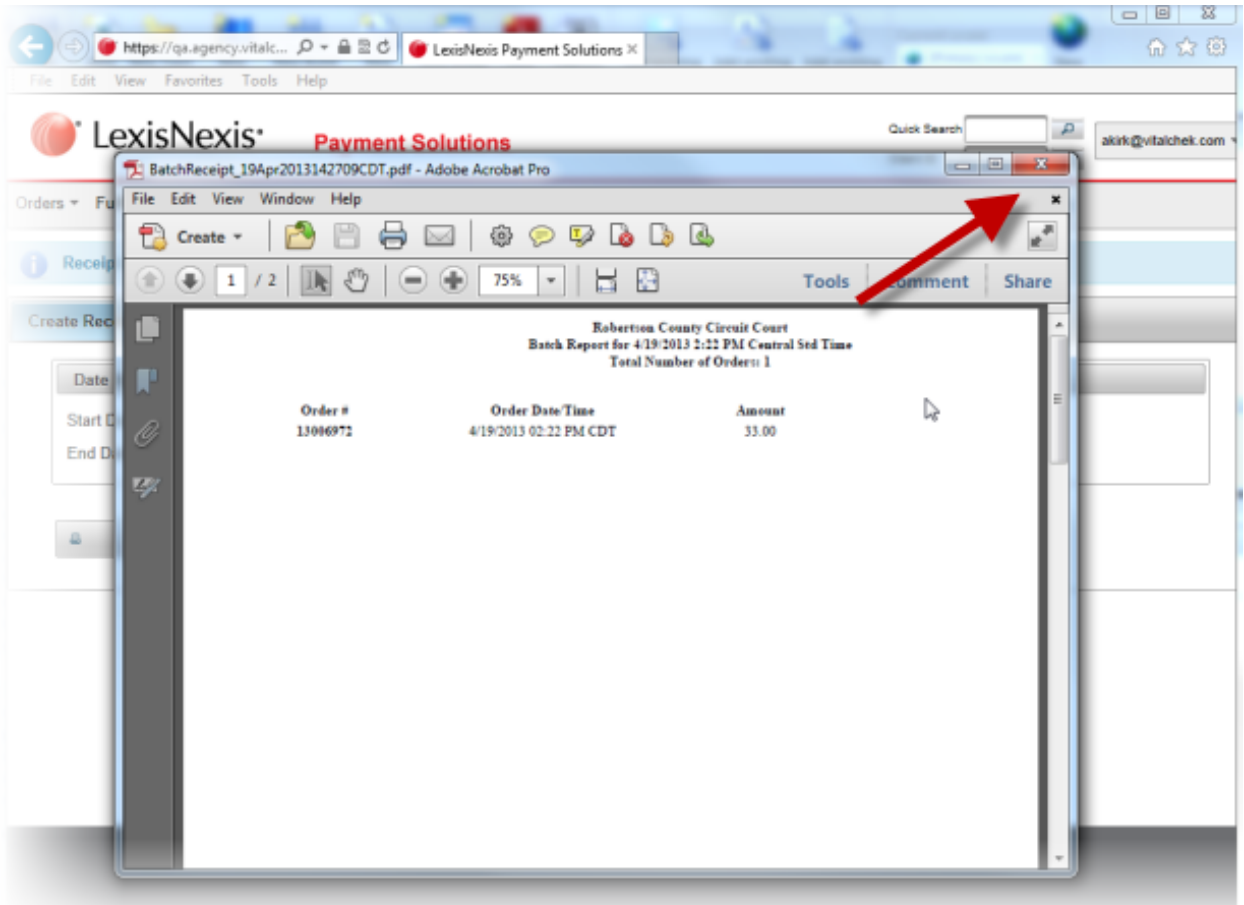
| Step 8 | User is returned to VPS, **Create Receipts** screen |

*Note - If receipt criteria was selected (ie **Date Range**) - to print additional receipts with new criteria/selections - click the **Clear** button to clear current selections and then repeat steps 2 - 5. Previous selections will remained grayed out and uneditable until the **Clear** button is clicked.*

19   How to Generate Shipping Labels

How to Generate Shipping Labels	Shipping labels are generated to address and send certificates. Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

| **Step 1**	From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.
Step 2	Enter **Order Number** and click **Submit** button *Note - User can also enter Order Number and a plus sign ("+") at the end of the number. Order will automatically submit*
Step 3	Order(s) will be displayed in table. Click check box to check and select order to generate shipping label
Step 4	Click Generate Labels button

Step 5   Shipping label message is displayed; click **Print** button

Shipping Label will generate and appear in a .pfd window
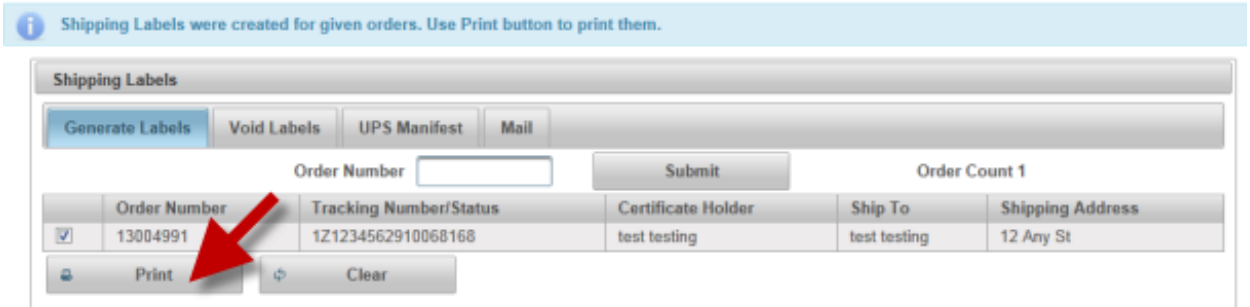
Step 6   Shipping label will generate and appear in a pdf window
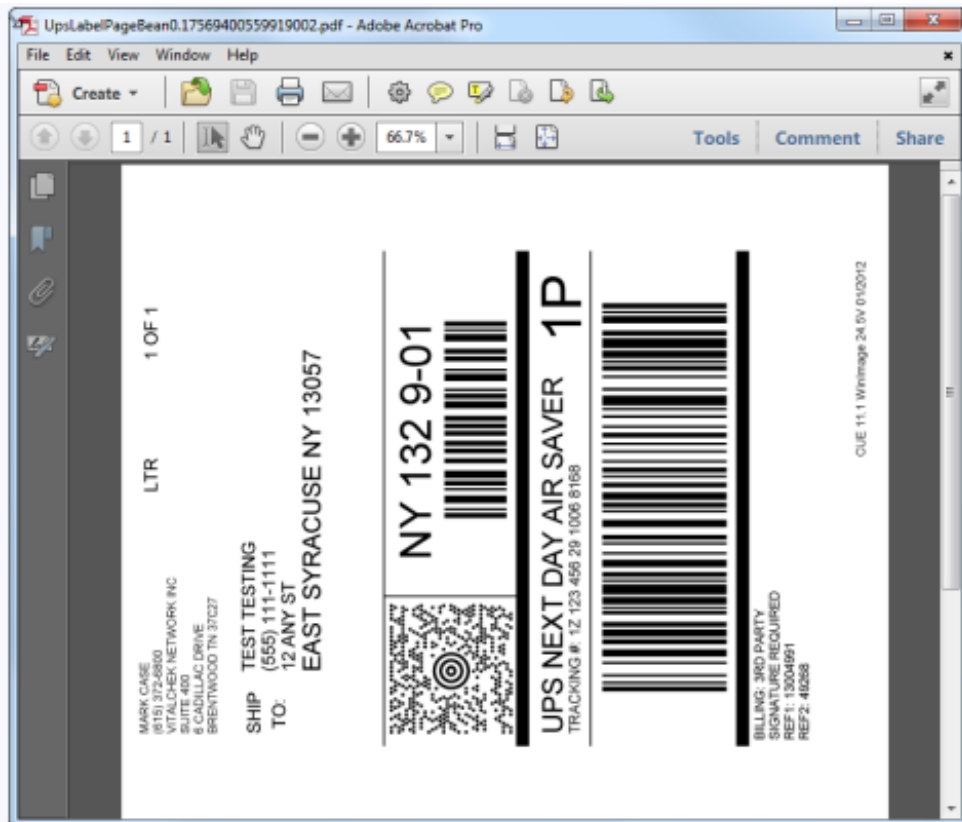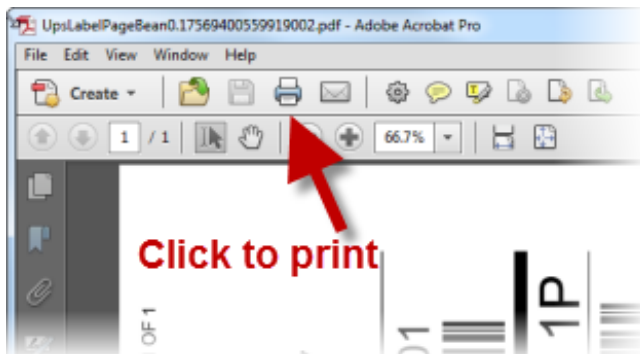

Step 7   Click printer icon to print label(s)

20   How to Void Shipping Labels

How to Void Shipping Labels	Shipping labels can be voided using the **Void Labels** tab
	Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions

Step 1	From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.

Step 2	Click **Void Labels** tab. Labels can only be voided *the day the label was generated*, *prior to the manifest being created*.

Step 3	Type the **Order Number** and click **Submit** button

Step 4	Order is displayed in the table. Click check box to include order

Step	Click Void Labels button
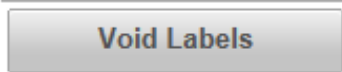
6	Void Labels
Step 7	Labels voided successfully message appears ⓘ **Labels voided successfully.**
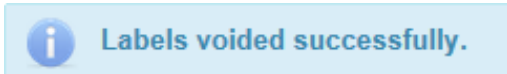
21   How to Print a Detail Report with Manifest

How to Print a Detail Report with a UPS Manifest	The User can generate and print a **Detail Report** with a **UPS Manifest** from the **UPS Manifest** tab.
	Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

Step 1   From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed

Step 2   Click **UPS Manifest** tab. **Generate New Manifest** screen displays with **Generate New Manifest** button pre-selected

Step 3   Check **Print UPS Detail Report w/Manifest**

Step 4   Click **Generate** button
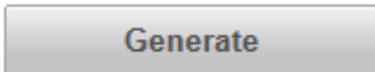
Step 5   Manifest/Detail Reports window displays

Step 6   **Detail Shipping Report** displays in .pdf

Step 7   Click printer icon to print

Step 8   Email notification is sent to customer order with UPS tracking information.

Note - if the manifest is not created, email will be automatically sent to the

customer the evening the order was batched.

VitalChek Shipping Notification

Thank you for choosing VitalChek. The following message concerns your order from Arlington Vital Records Bureau. Your request has been processed and is being shipped via UPS as detailed below.

Order Number: 13002555		PIN: 511789			
Item	Record Ordered	Qty	Price	Extra Copies	Total
1	Birth / Statewide (Raised Seal) : test test	1	$23.00	$0.0	$23.00
				Agency Expedite Fee:	$0.0
				Processing:	$10.00
				Shipping:	$18.00
				Tax:	$0.0
				Total:	$51.00

Your order has been assigned a UPS tracking number of 1Z1234561310029024. You may view the status of your package on the UPS website: Click here for UPS Shipping Status.

If you have any additional questions or would like to e-mail VitalChek about this order, please visit https://VitalChek-solutions.custhelp.com

Please do not reply to this e-mail as it is generated automatically and replies are not monitored.

22   How to Generate a New UPS Manifest

How to Generate a New UPS Manifest	The User can generate and print a **UPS Manifest** from the **UPS Manifest** tab.
	Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.
	When a manifest is created, an email is sent, notifying the customer their order has been shipped.

Step 1   From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.

Step 2   Click **UPS Manifest** tab. **Generate New Manifest** screen displays and **Generate New Manifest** button is pre-selected.

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Step 3 Click **Generate** button
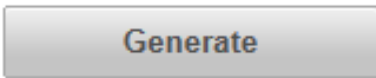
Step 4 **Manifest/Detail Reports** box displays

Step 5 Manifest Report displays in .pdf
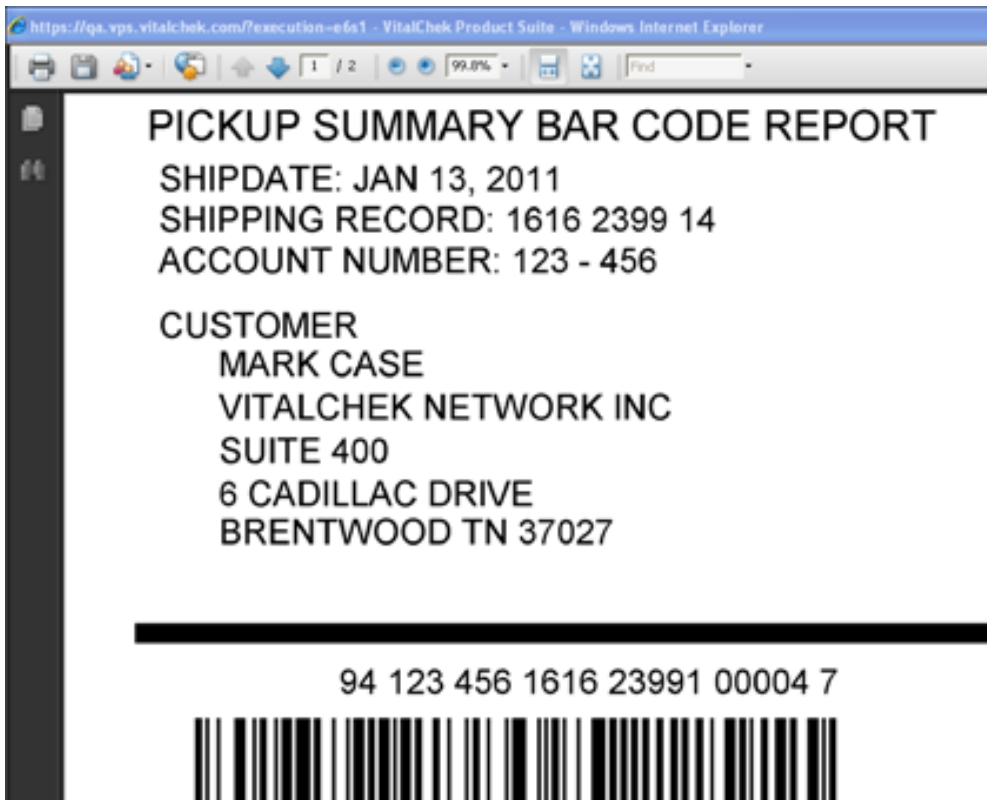
Step 6   Click printer icon to print

Step 7   Email notification is sent to customer order with UPS tracking information.

Note - if the manifest is not created, email will be automatically sent to the customer the evening the order was batched.

VitalChek Shipping Notification

Thank you for choosing VitalChek. The following message concerns your order from Arlington Vital Records Bureau. Your request has been processed and is being shipped via UPS as detailed below.

Order Number: 13002555		PIN: 511789			
Item	Record Ordered	Qty	Price	Extra Copies	Total
1	Birth / Statewide (Raised Seal) : test test	1	$23.00	$0.0	$23.00
				Agency Expedite Fee:	$0.0
				Processing:	$10.00
				Shipping:	$18.00
				Tax:	$0.0
				Total:	$51.00

Your order has been assigned a UPS tracking number of 1Z1234561310029024. You may view the status of your package on the UPS website: Click here for UPS Shipping Status.

If you have any additional questions or would like to e-mail VitalChek about this order, please visit https://VitalChek-solutions.custhelp.com

Please do not reply to this e-mail as it is generated automatically and replies are not monitored.

23 How to Reprint a Previous UPS Manifest

How to Reprint a Previous UPS Manifest	The User can generate and print a **Previous UPS Manifest** from the **UPS Manifest** tab Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions

Step 1	From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.
Step 2	Click **UPS Manifest** tab. **Generate New Manifest** screen displays with **Generate New Manifest** button pre-selected.
Step	Check **Reprint Previous Manifest** button

3
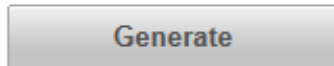
Step 4   Click **Generate** button
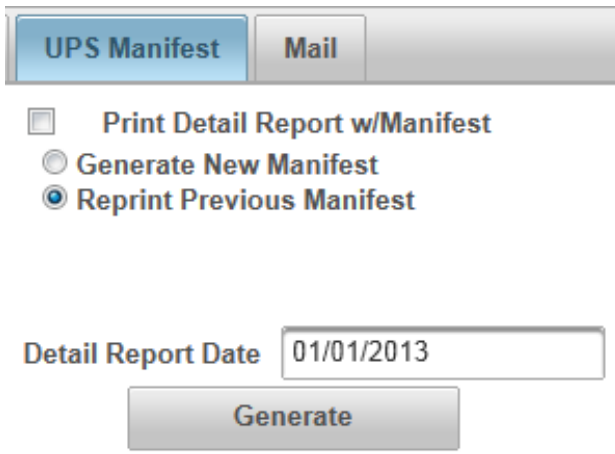
Step 5   **Reprint Previous** Manifest box displays defaulted to current date.

Enter a date to for which to reprint the manifest for or use the calendar to select a date.

Step 6   **Manifest/Detail Reports** box is displayed
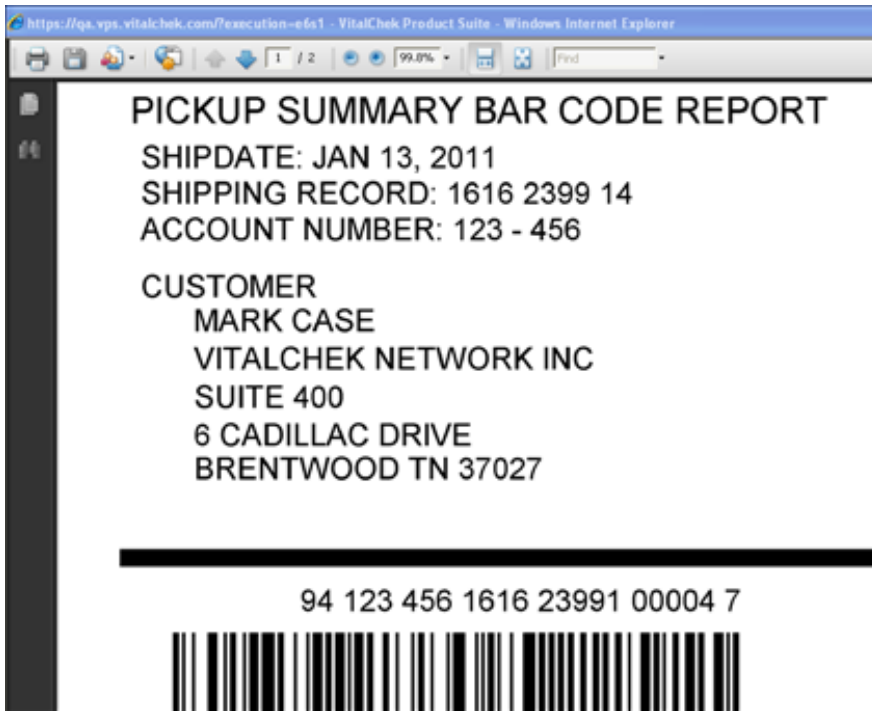
Step   Manifest Report displays in .pdf

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7	
Step 8	Click printer icon to print

24   How to Process Regular Mail

How to Process Regular Mail	Regular mail orders (United States Postal Service/USPS) are processed through the **Mail** tab.
	Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

Step 1	From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.
Step 2	Click **Mail** tab to display **Mail** screen
Step 3	Enter **Order Number**
Step 4	Click **Submit** button
Step	Order information is displayed

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5

| **Step 6** | Click **Update Mail Date(s)** button. |
| **Step 7** | Confirmation message appears |

All orders entered have been marked as shipped

25   How to Manually Close Orders with ACH

How to Manually Close Orders with ACH	Access from the **Closeout** menu. Opens to the **Close Orders** screen and contains tabs for **Reprint Report**, and **Incomplete Close**
	Users must have a role of **Manager** to be able to view and access **Closeout** functions
	Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.

Step	From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed

1

Step 2   Select **Criteria** to close, or proceed to Step 3 to include all available criteria in the closeout

Step 3   Click **Show Orders in Grid** button

Step 4	Available orders to close will display in **Orders to Close** table

> *Note - To exclude order(s) from the close:*
>
> 1. *Click to highlight order in Orders to Close table*
>
> 2. *Click Exclude button* ⟶ *(or click Exclude All button* ⟶| *to exclude all orders from the close process). To move orders back and include in the close, click the Include button* ⟵ *(or Include All button* |⟵ *to include all orders in the close)*
>
> 3. *Order(s) will move to the Orders to Exclude table and will not be included in the close*
>
> *Note - To move multiple orders - click & hold the Control button while clicking the orders to be moved; this will allow the user to select multiple orders at one time*

Step 5	Click **Process Close** button
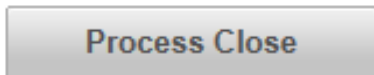
Step 6	Close job report screen appears while close is processing
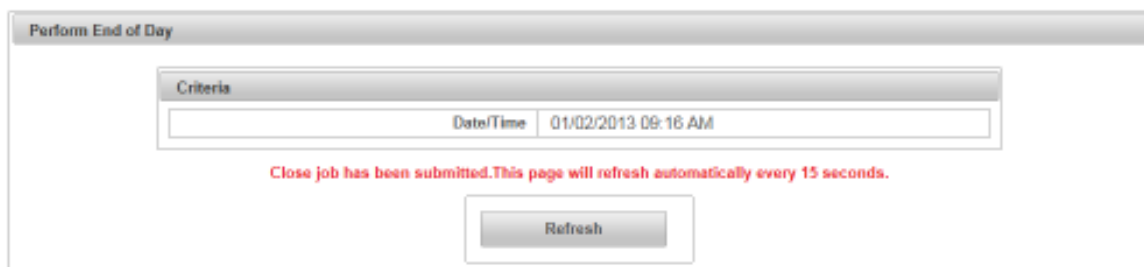
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Step 7 **Available Close Reports** screen appears when reports have been generated
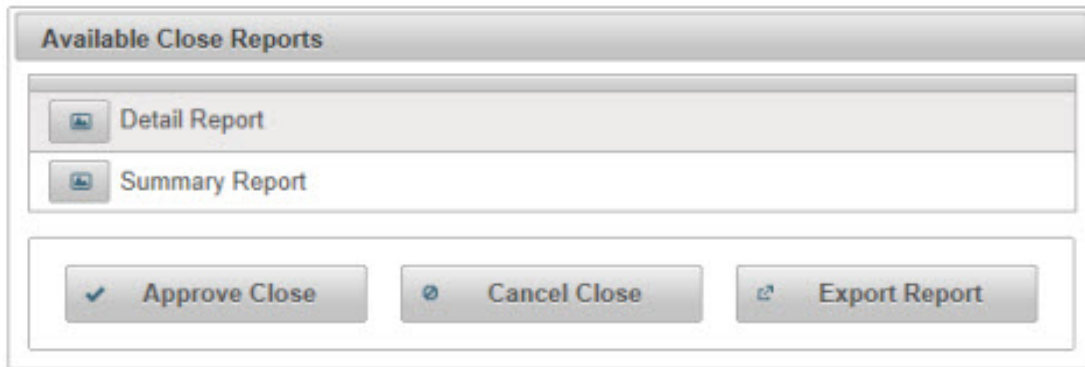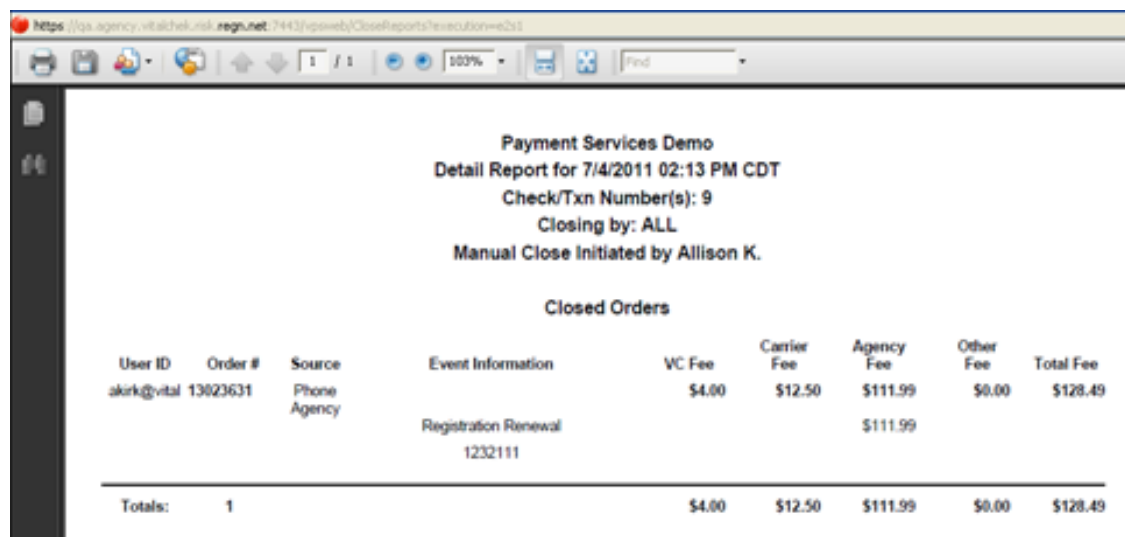
*Note - Click the **Export Report** button to export to an Excel file*

Step 8 Click **Report** image icon to view report required
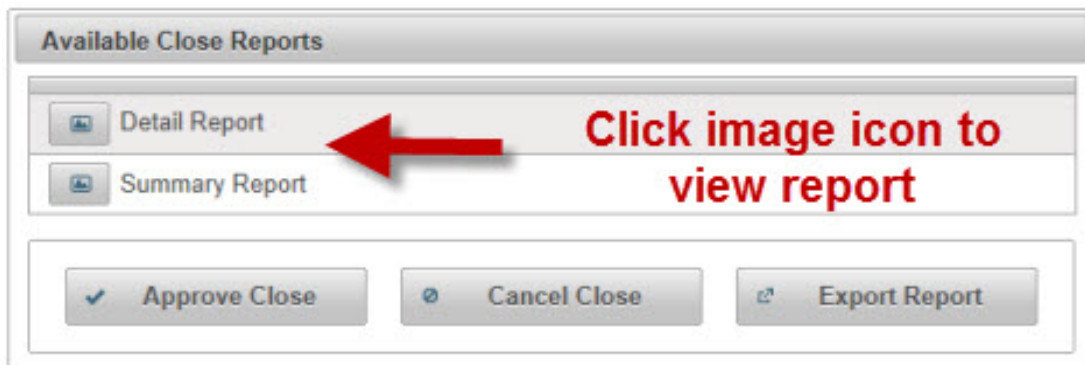
Selected report appears in a .pdf window. Reports can be printed by clicking the printer icon.

Detail Report:

Summary Report:

Payment Services Demo
Summary Report for 7/4/2011 02:13 PM CDT
Check/Txn Number(s): 9
Closing by: ALL
Manual Close Initiated by Allison K.

Product Type	Quantity	Agency Fee	Other Agency Fee	Total
Registration Renewal	1	$111.99	$0.00	$111.99
Totals:	1	$111.99	$0.00	$111.99

Order Source	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Agency Staff				
akirk@vitalchek.com	1	$111.99	$0.00	$111.99
Order Total:	1	$111.99	$0.00	$111.99
Totals:	1	$111.99	$0.00	$111.99

	Total Agency Fee:	$111.99

Step 9	Click **Approve Close** button to continue processing the close
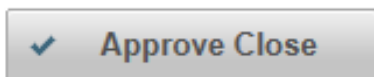
Step 10	Close process is complete and payment confirmation displays

Perform End of Day

Available Close Reports

- Detail Report
- Summary Report

Your ACH payment has been scheduled. Transaction number: 588092013010210092601
Amount: $80.00

OK
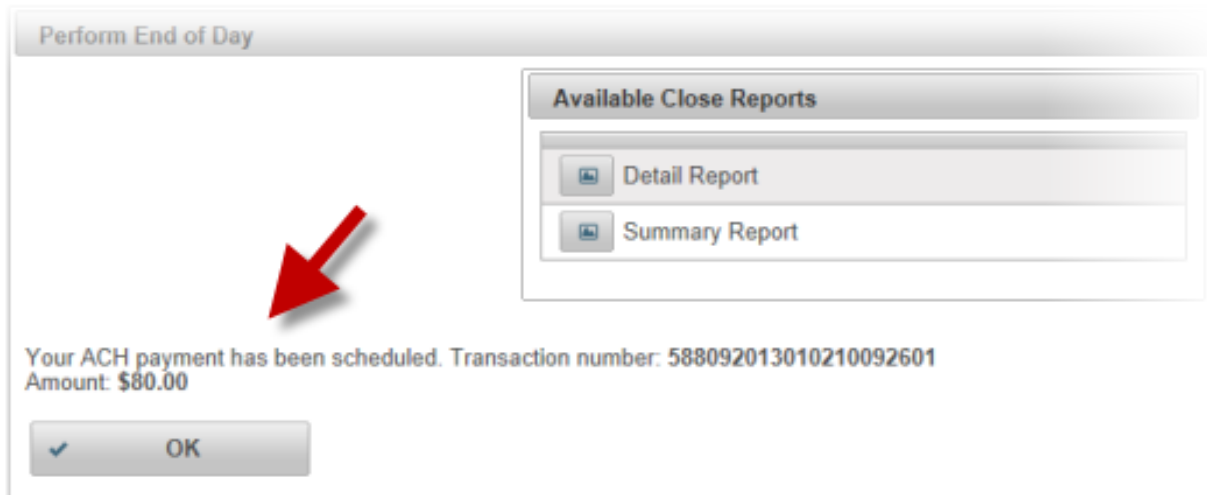
Step 11	Click **OK** button to confirm close and return to **Close Orders** screen

26   How to Close Orders with a Check

How to Manually Close Orders with a Check	Access from the **Closeout** menu. Opens to the **Close Orders** screen and contains tabs for **Reprint Report**, and **Incomplete Close**
	Users must have a role of **Manager** to be able to view and access **Closeout** functions
	Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.

Step	From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed

1

Step 2   Select Criteria to close, or proceed to Step 3 to include all available criteria in the closeout

Step 3   Enter check number from the pre-printed VitalChek check paper

Step 4   Click **Show Orders in Grid** button

Step 5   Available orders to close will display in **Orders to Close** table

Note - To exclude order(s) from the close:

1. *Click to highlight order in Orders to Close table*

2. *Click Exclude button* [→] *(or click Exclude All button* [→|] *to exclude all orders from the close process). To move orders back and include in the close, click the Include button* [←] *(or Include All button* [|←] *to include all orders in the close)*

3. *Order(s) will move to the Orders to Exclude table and will not be included in the close*

    Note - To move multiple orders - click & hold the Control button while clicking the orders to be moved; this will allow the user to select multiple orders at one time

Step 6   Click **Process Close** button

Step   Close job report screen appears while close is processing; click to manually refresh

7

Step 8

Available Close Reports screen appears when reports have been generated

*Note - Click the **Export Report** button to export to an Excel file*

Step 9

Click **Report** image icon to view report required

Selected report appears in a .pdf window. Reports can be printed by clicking the printer icon.

Detail Report:

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Summary Report:

Step 9	Click **Approve Close** button to continue processing the close

Step 10	Check paper confirmation message appears. Make sure the printer has pre-printed check paper with the number entered in the **Check Number** box
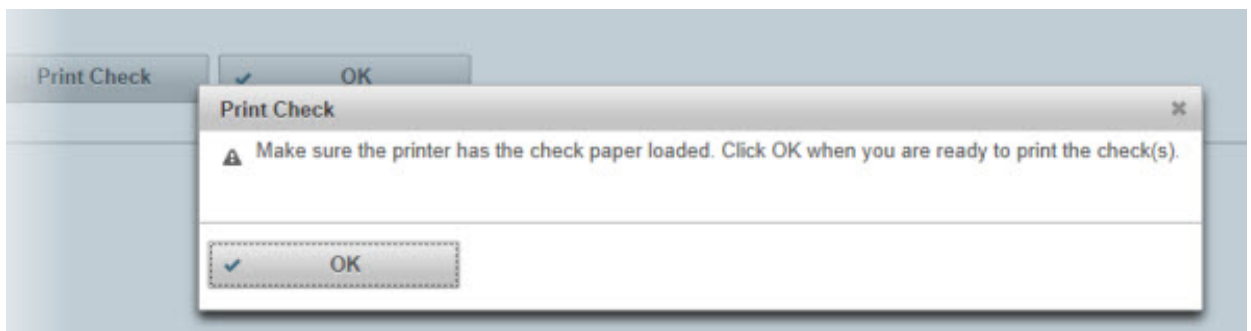
Step 11	Click **OK** button

Step 12	Check displays in a .pdf
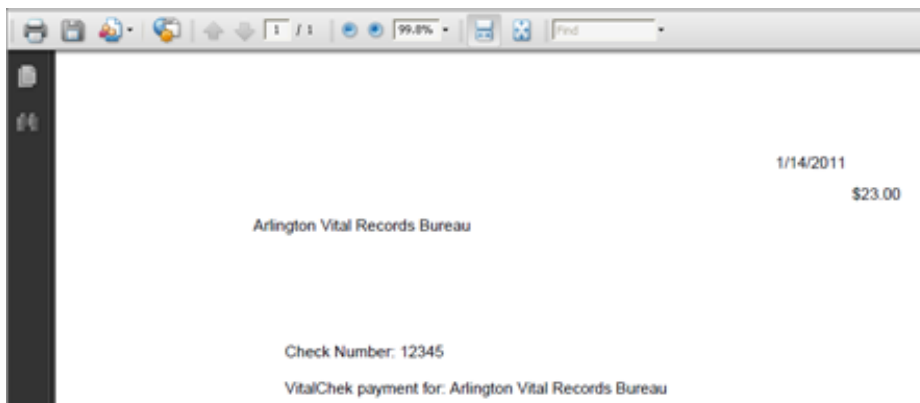
Step 13	Click printer icon to print check on check paper

27 How to Reprint a Report

How to Reprint a Close Report	Close reports can be reprinted from the **Reprint Report** tab.
	Users must have a role of **Manager** to be able to view and access **Closeout** functions
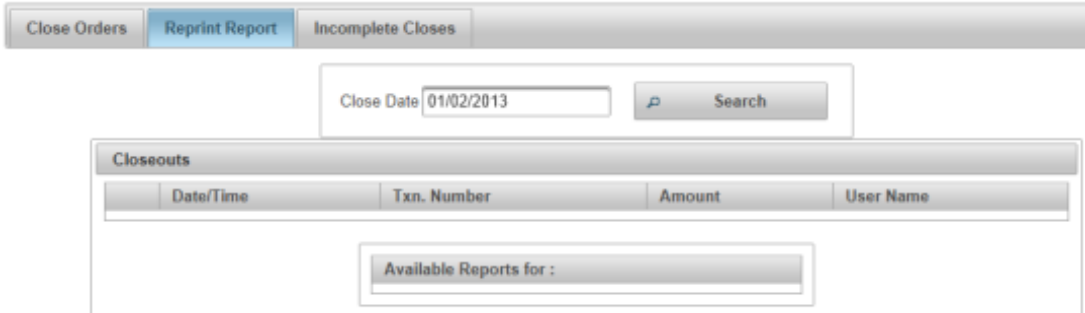
Step 1	From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed
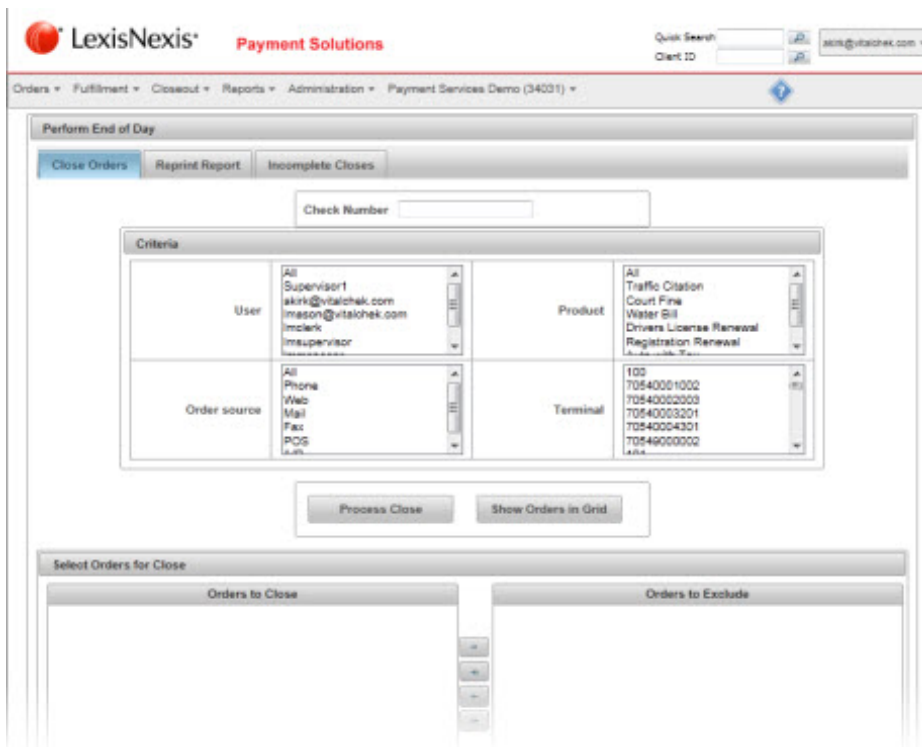
Step	Select **Reprint Report** tab to display **Reprint Report** screen

2

Step 3   Enter Close Date or select date from calendar icon

Step 4   Click **Search** button

Step 5   Available closeouts from selected date are displayed

Step 6   Click on Date/Time line to select closeout

Step 7   Available Reports for selected date are displayed, Click on required report to display in .pdf. Click **Export Report** to export to an Excel file

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Closeouts			
Date/Time	**Txn. Number**	**Amount**	**User Name**
▶ 02/04/2014 01:39:49 PM CST	56789	$20.00	Allison
▶ 02/04/2014 01:50:37 PM CST	56774	$25.00	Allison
▶ 02/04/2014 02:21:42 PM CST	556647	$10.00	Allison

Click image to display report →

Available Reports for : 04 Feb 2014 13:39:49 CST

🖼 Detail Report

🖼 Summary Report

↗ Export Report

28   How to Process an Incomplete Close

How to Process an Incomplete Close	Closes that were interrupted during the closeout process, or **Incomplete Closes,** can be completed from the **Incomplete Closes** tab.
	Users must have a role of **Manager** to be able to view and access **Closeout** functions.
	Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.
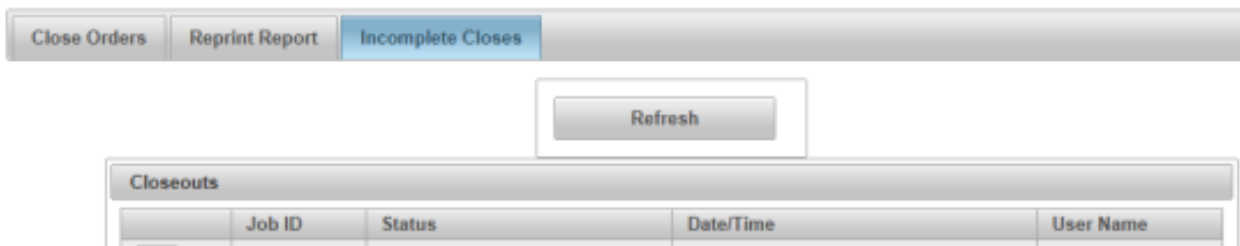
Step 1	From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed
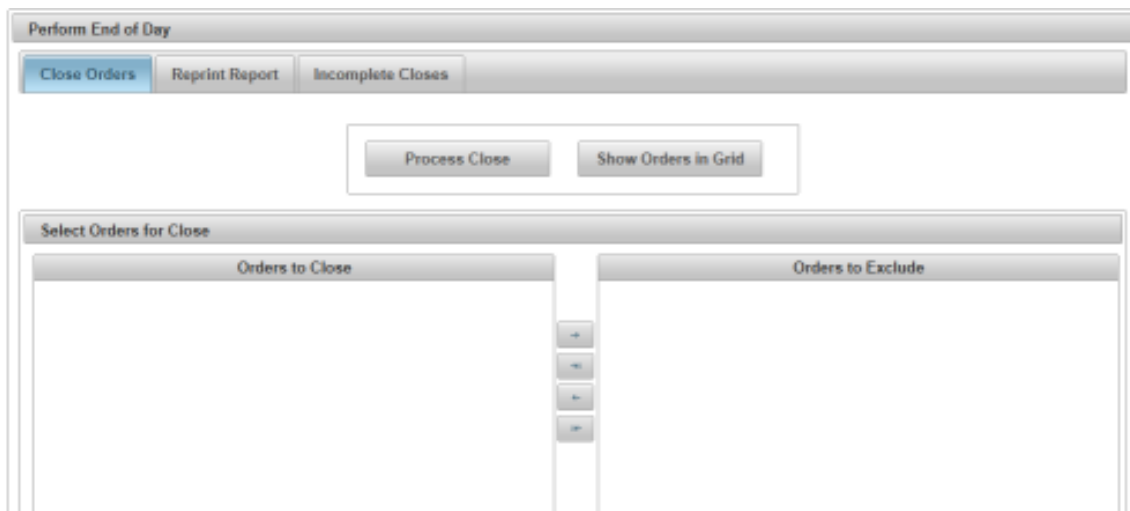
Step 2	Click **Incomplete Closes** tab
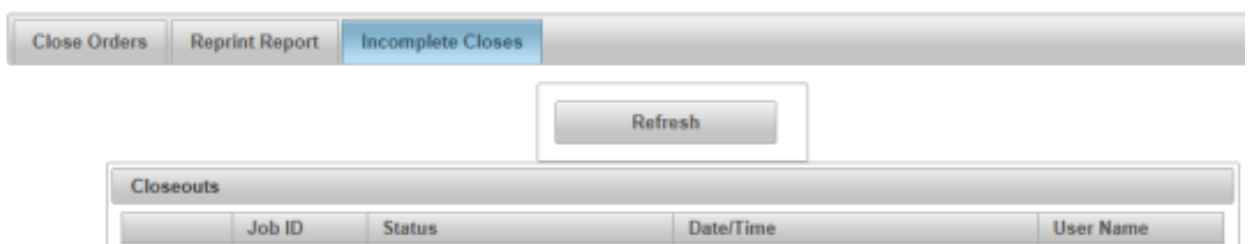
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Step 3	Click **Refresh** button to display incomplete closes in the **Closeout** table
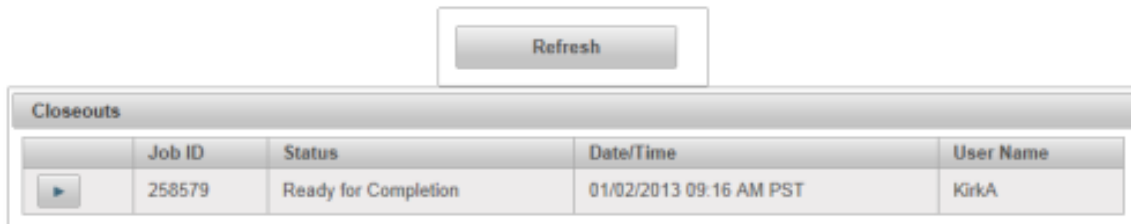
Step 4	Click the **arrow** link to select and complete the close
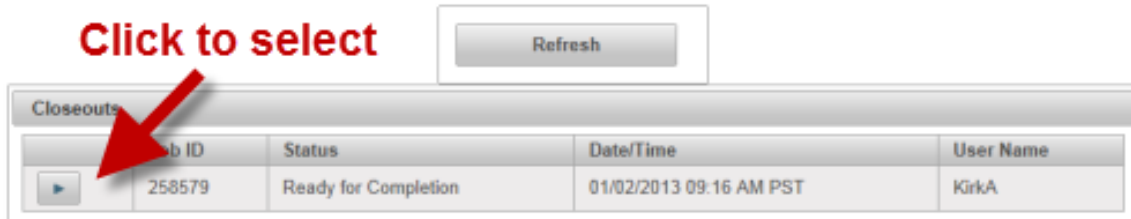
Step 5	The **Available Reports** screen is displayed with payment information

Note - Click the ***Export Report*** *button to export to an Excel file*

Step 6	Click **Report** link to view report required

Selected report appears in a .pdf window. Reports can be printed by clicking the printer icon.

Detail Report:

Summary Report:

Step 7	Click Approve Close to complete close process

Step 8	Payment information is displayed and closeout process is complete (ACH) or print check
	Note - Agencies that close with a check, see **How to Close Orders with a Check (Section 26)** *to complete closeout*

29   How to Search for Users

How to Search for Users	VPS Users are located using the **User Maintenance** screen.
	Users must have a role of **Administrator** to be able to view and access **Administration** functions.

User Maintenance

First Name [   ]
Last Name [   ]
Expired [ ]

[Search]   [Clear]   [Add New User]

User Name	First Name	Last Name	Locked	Expired	Last Login Date

---

Step 1 From the **Administration** menu, select **User Maintenance. User Maintenance** screen is displayed

User Maintenance

First Name [   ]
Last Name [   ]
Expired [ ]

[Search]   [Clear]   [Add New User]

User Name	First Name	Last Name	Locked	Expired	Last Login Date

Step 2 Enter (at least) first letter of **First Name** of User

First Name [   ]

Step 3 Enter (at least) first three letters of **Last Name** of User

Last Name [   ]

Step 4 Check **Expired** to *include* expired users in search or leave unchecked to *exclude* expired users.

Expired [ ]

Step 5 Click Search button

[🔍   Search]

Step 6 Search result are displayed

[Search]   [Clear]   [Add New User]

User Name	First Name	Last Name	Locked	Expired	Last Login Date
akirk@vitalchek.com	Alison	Kirk			01/02/2013

Click link to display Edit User screen

Step 7 **Edit User** screen displays

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30   How to Unlock Users

<table>
<tr><td>How to Unlock Users</td><td>Users that are locked out of VPS will have a check in the Locked box and will display in two locations:

1- User Search screen
2 - Edit User screen</td></tr>
</table>

User Search:

User Name	First Name	Last Name	Locked	Expired	Last Login Date
vpsweb2.0@gmail.com	training	vps	✓	☐	12/28/2012

Edit User:

Steps to Unlock a User

Users must have a role of **Administrator** to be able to view and access **Administration** functions.

When a user reports that they have received a Locked message, such as the one below, the Administrator can unlock the user if appropriate.

The user you attempted to authenticate is disabled, please contact support.

Locked box is checked in User Maintenance

Enter Security Credentials

User ID (email address)

Password (case-sensitive)

Login

Forgot Your Password?

VPS Version 2.0
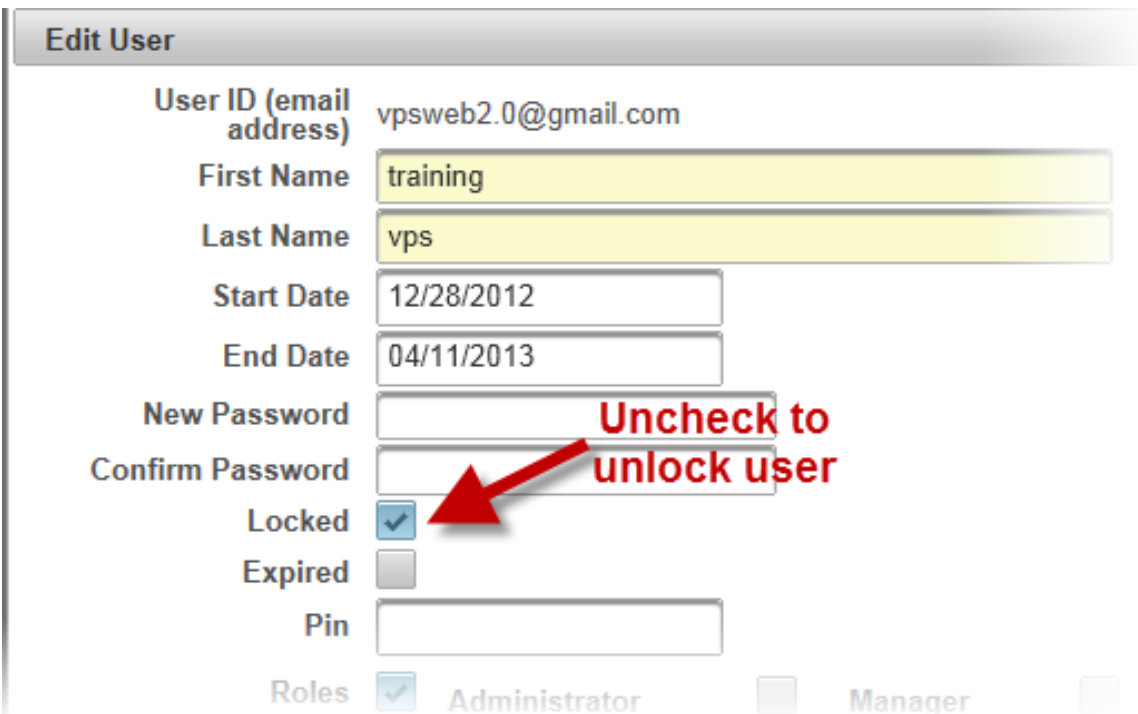
Step 1: Login as Administrator

Step 2: Select User Maintenance from the Administration menu option.

Step 3: Search for the user by first and last name.

Step 4: Select the user from the results grid.

Step 5: Click on the Locked check box to clear the check mark.

Edit User

User ID (email address) vpsweb2.0@gmail.com

First Name training

Last Name vps

Start Date 12/28/2012

End Date 04/11/2013

New Password

Confirm Password

Uncheck to unlock user

Locked ✓

Expired

Pin

Roles ✓ Administrator ▢ Manager

How to Use VitalChek Product Suite

Step 6: Save changes

Step 7: View message at top left of User Maintenance screen to verify the change was saved successfully.

31   How to Add New Users

How to Add New Users	Add New User screen contains information on VPS **Users.** Required information is highlighted yellow.
	Users must have a role of **Administrator** to be able to view and access **Administration** functions.

Step 1	From the **Administration** menu, select **User Maintenance. User Maintenance** screen is displayed

Step 2	Click **Add New User** button

Step	**Add New User** screen in displayed. Required fields are highlighted yellow

3

Step 4   Enter **User ID**; must be a valid email address

Step 5   Enter User's **First Name**

Step 6   Enter User's **Last Name**

note - Start Date defaults to current date, if another End Date is required, click in date field or click on calendar icon to display the calendar. Click on required date to select.

note - End Date defaults to Dec 31, 2999. If another End Date is required, Click in date field or click on calendar icon to display the calendar. Click on required date to select.

Step 7   Enter a **PIN** number for users that will be operating a point of sale (POS) device. PIN must be 1 - 4 digits and unique; no other user in the agency may use the same number

Step   Select a **Role** for the User by checking the box(es) next to the role. When choosing a role,

8	determine what functions the user will perform in the agency. A User may have an Administrator role along with *one* other role (Manager-Supervisor-Clerk).

- **Administrator** – Administers users for an assigned agency
- **Manager** – Agency Supervisor role plus performs End of Day
- **Supervisor** – Agency Clerk role plus void and issue credits
- **Clerk** – Enters, inquiries, modifies orders

Roles ☐ Administrator ☐ Manager ☐ Supervisor ☐ Clerk

| Step 9 | Available Agencies are displayed in the **Available** table on the left side.

To add the User to an Agency, click Agency name to select it and click **Add** button [→] to move it to the right table.

To add to all Agencies displayed, click the **Add All** [→|] button.

 |
|---|---|

| Step 10 | Selected Agency will be displayed in the right table
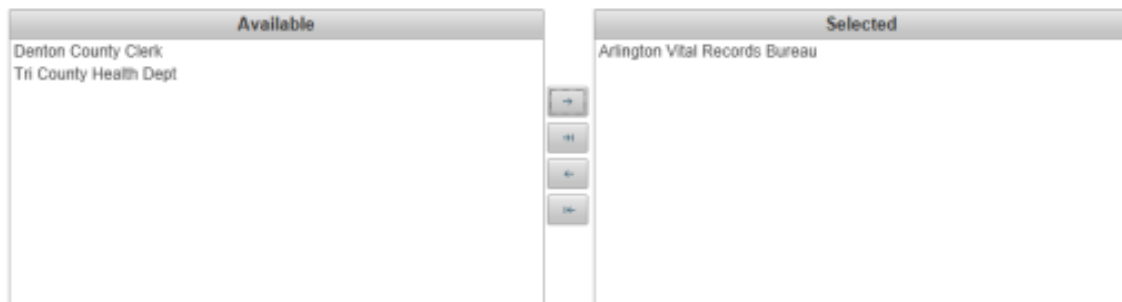
 |
|---|---|

| Step 11 | Click **Save** button

Save |
|---|---|

| Step 12 | Confirmation message that User is receiving an email to activate their user ID is displayed

ⓘ User information saved successfully. Activation email has been sent. |
|---|---|
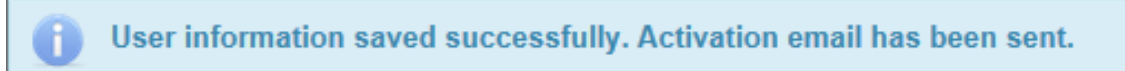
32   How to Add Agencies to Users

How to Add Agencies to Users	Administrators can add Agencies to Users who need to access more than 1 Agency.
	Users must have a role of **Administrator** to be able to view and access **Administration** functions.

Step 1	From the **Administration** menu, select **User Maintenance. User Maintenance** screen is displayed
Step 2	Enter first initial of **First Name** and first 2 letters of **Last Name** (at least) to search for User
Step 3	Click **Search** button
Step 4	User is displayed in search results, click on **User ID** link
Step	**Edit User** screen is displayed

5

Step 6	Available Agencies are displayed in left column; the Agencies User currently has access to are displayed in the right column

Step 7	Click on the Agency to highlight in the left column

Step 8	Click **Add** button to move agency to **Selected** table

*Note - to select all available Agencies, click **Add All** button*

Step 9	Selected Agencies are displayed in the right column

How to Use VitalChek Product Suite

33   How to Reset a Forgotten Password

How to Reset a Forgotten Password	Upon entering VitalChek Product Suite, the User will be presented with a **Enter Security Credentials** login page

Step 1	To reset a forgotten password, Enter **User ID** (email address)
Step 2	Click the **Forgot Your Password?** link
Step 3	**Request Password Reset** screen will be displayed

Step 4	Enter **User ID** (email address) if not prepopulated from login page.\
Step 5	Click **Submit** button
Step 6	Email confirmation message appears

Step	**VPS Password Reset Instructions** email is sent to User

7
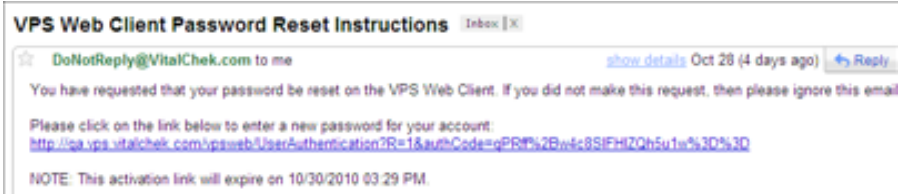
Step 8   Click link in the email to display the **Password Reset** page.

Step 9   Enter a **New Password**

*Note: Password Strength indicator displays weak-good-strong based on password selection. See **How to Create a New Password (on-line documentation)** for Password Rules*

Step 10   Confirm **New Password**

Step 11   Click **Change Password** button

Step 12   **Success** message appears confirming **Password Reset Complete**
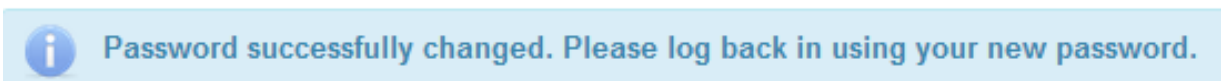
Step 13	Enter **User ID** and new **Password** to login

Password successfully changed. Please log back in using your new password.

Enter Security Credentials

User ID (email address)

Password (case-sensitive)

Login

Forgot Your Password?

VPS Version 2.0

Step 14	Login to VPS using new password

34   How to Change an Expired Password

How to Change an Expired Password	Passwords expire every 90 days. If the password expiration date has passed, user will be prompted to enter the **User ID**, **Old Password** and **New Password** on the **Change Password** screen.

Step 1	Enter **User ID**
Step 2	Enter **Old Password**
Step 3	Enter a **New Password**
Step 4	**Confirm Password**
Step 5	Click **Change Password** button
Step 6	User is returned to login screen to login with new password

35 How to Reset a Password

How to Reset a Password	Users that have attempted to Login to VPS unsuccessfully 5 times or more, will be locked out of VPS and **User ID is disabled** message will appear. User will need to contact their Administrator to unlock them. Once the Administrator has unlocked the User, the User can reset their password using the **Forgot Your Password** link.

36   Definitions

Address Verification System	Also known as AVS. An identity theft prevention measure which verifies that the credit card billing address provided by the customer matches the address that is on file with the financial institution. Once the credit card is charged, an AVS response will be generated in the form of a single letter code. When failed, a photo ID is required
Administrator	A role that is assigned in VPS allowing the user to add, update, deactivate, reactivate, and reset password for users within assigned Agency. Agencies must have at least one Administrator
Authenticate	An identity theft prevention measure where the applicant's name, date of birth, and partial or full social security number is matched to the information on file with the Social Security Administration. When failed, a photo ID is required. ProChek is the name of the service that processes authentications
Business Units	Term used to describe agencies or offices that use VPS
Declined Payment	Payment was not authorized by the bank (the card has not been charged); the response from the bank will be: "declined payment"
Detail Report	Report that is generated during the Closeout process showing individual orders that are being closed
Manager	A role that is assigned in VPS allowing the user to enter, search, and modify orders, as well as perform voids and Closeout functions
Order	The information retained in the VPS system regarding the payment
Order Closeout	The end of the day process in the VPS system through which the business unit receives a check or ACH deposit for payments taken from consumers Orders included in the Close Process are changed to a 'Closed' status, and Detail and Summary Close Reports are generated
Order Grid	This is a list of orders. In the Order Closeout window, the 'Orders to Close' Grid displays orders that are in an 'Open - Paid in Full' status, and are available for closeout. Orders can be moved from the 'Orders to Close' grid to the 'Orders to Exclude' grid during the Closeout process if the user chooses to not include those orders in the Closeout process
Order Receipt	The receipt displaying the order and payment information, can be printed from the VPS System
Password	The individual code that allows users to access the VPS System
POS	Point of Sale device used for credit/debit card transactions
Product	The items that can be paid for using the VPS, or any VitalChek remote processing option (i.e. birth/death/marriage certificates)

How to Use VitalChek Product Suite

Roles	Users in VPS are assigned a role (Supervisor, Manager, and/or Administrator). Each role has specific permissions that allow the user to complete their job duties
Summary Report	Report that is generated during the Closeout process showing a summary of all orders that are being closed
Supervisor	A role that is assigned in VPS allowing the user to enter, search, and modify orders as well as perform voids
User	The term for any person that has been given access to the VPS system.
User Name	The unique identifier that allows the User to logon to the VPS System. Must be unique to the VPS System across all business units
VPS	VitalChek Product Suite; the VitalChek software application
VitalChek	A LexisNexis Company that is the official source for government-issued vital records and offers payment solutions that help Government Agencies automate payments of fees, utility bills, license renewals, citations, monthly payments and more
Void Transaction	The steps that are completed to cancel a payment

37   How Do I Contact UPS for Pick-Up

How Do I Contact UPS for Pick-UP	Agencies may have a daily schedule where UPS picks up packages everyday. Agencies that do not have a daily pick-up scheduled will need to contact UPS to schedule a pick-up as needed.

UPS can be contacted:

1. www.UPS.com

2. 1-800-PICK-UPS (742-5877) and say "schedule a pick-up"

38   How to Log on to the POS Terminal

How to Log On to the POS Terminal

Each person that accepts payments at the counter has an individual Operator ID to login to the Point of Sale (POS) terminal.

Users log onto the POS terminal before each transaction.

Step 1   Using the keypad, the user inputs POS **Operator ID** and then presses the green enter button to logon to the terminal

Step 2   User is now logged onto the terminal and **Select Operation** screen displays

How to Use VitalChek Product Suite

39   How to Log Off the POS terminal

How to Log Off the POS Terminal

Users are automatically logged off the POS terminal at the end of each transaction or by pressing the red **Cancel** button.

40   How to Run a POS Transaction

How to Run a POS Transaction	The POS terminal is used to run payments, or transactions.

Step 1	Inform the cardholder of the VitalChek fee
Step 2	User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal *Note - if the Operator ID was entered incorrectly or does not have the authority for the transaction, an error message will be displayed*

Step 3   **Select Operation** screen displays

How to Use VitalChek Product Suite

Step 4   Select **Payment** option by pressing corresponding number on the pinpad then press the green enter button

Step 5   **Select Product** screen displays with available product options

Note - agencies with multiple products use the purple key above the number 1 to scroll

Step 6   Select Product by pressing the corresponding number on the pinpad then press the green enter button

For agencies with more than 10 product selections, press # for the first 1. Ex 10 = #0, 11 = #1, 12 = #2, etc

Step 7   **Reference Number** screen displays (if applicable)

Step 8   Enter Agency defined **Reference Number** (if applicable) and press the green enter button

Note: Alphabetic characters are obtained by hitting a number field multiple times to scroll through. For example: for the letter "a", press the 2 color twice

Step 9   **Enter Amount** screen displays

Step 10   Enter the **Payment Amount** using the numeric keypad. **Do not include the VCN Fee.** The VCN Fee will be added automatically. Press the green enter button.

Step 11   **Another Product** screen displays, use the purple buttons to select Yes or No.

If Yes, return to step 5 for each additional product.

How to Use VitalChek Product Suite

Step 12   Select **Yes** or **No** by pressing the corresponding purple button

Step 13   **Waiting on Card Swipe** screen displays on terminal

How to Use VitalChek Product Suite

Pin pad prompts customer to swipe card

Note: If the card will not swipe (the magnetic strip is worn or damaged), after 3 bad swipes, you will be prompted to manually enter the card number, expiration date, CV2 Code and card billing address Zip Code by using the key pad on the terminal.

Step 15   If applicable, the Debit/Credit screen displays on terminal and Pin Pad

How to Use VitalChek Product Suite

Step 16   Select Debit or Credit by pressing the corresponding F1 or F4 button

Note - If **DEBIT** is selected, the cardholder will be prompted to enter their PIN number on the PIN pad with terminal displaying: **"Ask customer to enter PIN. Please Enter PIN"**

Step 17   **Payment** screen displays on terminal

Total Amount screen displays on Pin Pad. Select F1 for Yes or F4 for No and press the green enter button.

How to Use VitalChek Product Suite

Step 18   **Authorizing** message displays on both Terminal and Pin Pad

Step 19   The **Agency** Receipt automatically prints and the **Print** screen displays on the terminal. Select Yes to print customer receipt and press the green enter key.

Note - Printed on the receipt is the payment confirmation number and the agency reference number.

41   POS Receipt Examples

POS Receipts	Agency and Customer receipts are printed after each POS transaction.

Agency Receipt

```
                Agency Name
               Agency Address
            Agency City, State, Zip


MID:                999999
TID:                9999999999999
Terminal ID:        V9999999
Date / Time:        99/99/99 99:99 AM EDT
Confirmation #:     99999999

Card #:             *************9999
Expiration:         ##/##
Transaction Type:
     Payment/Purchase/Sale      $13.52
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:      Credit
Card Type:         MasterCard
Approval Code:     999999


Product Name                    $11.02
12345


         Agency Amount:     $11.02
    LexisNexis Service Fee:  $2.50

             Total Fee:      $13.52



Cardholder Signature


X---------------------------------------------

            Merchant Copy
```

Agency Receipt - VISA Payments

Note - there are 2 separate authorization lines

Agency Receipt - VISA Payments

Note - there are 2 separate authorization lines

```
                Agency Name
               Agency Address
            Agency City, State, Zip


MID:                999999
TID:                9999999999999
Terminal  ID:       V9999999
Date / Time:        99/99/99 99:99 AM EDT
Confirmation #:     99999999

Card #:             ************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale      $2.50
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:      Credit
Card Type:         Visa
Approval Code:     999999

Card #:             ************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale      $1.00
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:      Credit
Card Type:         Visa
Approval Code:     999999

Product Name                   $1.00
12345


        Agency Amount:     $1.00
   LexisNexis Service Fee:  $2.50

              Total Fee:    $3.50



Cardholder Signature



X-----------------------------------------

           Merchant  Copy
```

Customer Receipt

```
                 Agency Name
                Agency Address
             Agency City, State, Zip


MID:              999999
TID:              9999999999999
Terminal  ID:     V9999999
Date / Time:      99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:           *************9999
Expiration:       ##/##
Transaction Type:
     Payment/Purchase/Sale      $13.52
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:      Credit
Card Type:         MasterCard
Approval Code:     999999


Product Name                   $11.02
12345


          Agency Amount:    $11.02
    LexisNexis Service Fee:  $2.50

             Total Fee:     $13.52



          Customer Copy
```

Customer Receipt - VISA Payments

Note - there are 2 separate authorization lines

```
              Agency Name
             Agency Address
          Agency City, State, Zip


MID:                999999
TID:                9999999999999
Terminal ID:        V9999999
Date / Time:        99/99/99 99:99 AM EDT
Confirmation #:     99999999

Card #:             ************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale      $2.50
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:       Credit
Card Type:          Visa
Approval Code:      999999

Card #:             ************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale      $1.00
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:       Credit
Card Type:          Visa
Approval Code:      999999

Product Name                    $1.00
12345


            Agency Amount:    $1.00
   LexisNexis Service Fee:    $2.50

               Total Fee:     $3.50




           Customer Copy
```

How to Use VitalChek Product Suite

42   How to Void a POS Transaction

How to Void a POS Transaction	POS transactions may be voided using the POS terminal and selecting the Void option.

Step 1	User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal
	Note - if the Operator ID was entered incorrectly or does not have the authority for the transaction, an error message will be displayed

How to Use VitalChek Product Suite

Step 2   **Select Operation** screen displays

Step 3   Select the **Void** option and press the green enter key

Step 4 **VOID** screen displays

Step 5   Enter the confirmation number located on the receipt and press the green enter button

How to Use VitalChek Product Suite

Step 6   Void confirmation screen displays

Step 7   Verify the amount on the terminal, press Yes or No and press the green enter key

How to Use VitalChek Product Suite

Step 8	After pressing **Enter** to confirm **Yes**, the terminal displays the card swipe message

Pin Pad prompts the user to swipe the same card that was used for payment

How to Use VitalChek Product Suite

*Note - if the original transaction was Debit, the terminal will display the message: "**Press Enter when ready to enter PIN on the PIN pad...**"*

User presses green enter button to OK and the customer is asked to enter PIN and press the green enter button on the PIN pad.

Note - The void amount displayed is the amount of the transaction plus the VCN fee

Step 7   After pressing **Enter** to confirm **Yes**, the Agency Receipt automatically prints

VOID RECEIPT - Agency Copy

```
                    Agency Name
                   Agency Address
                Agency City, State, Zip


MID:              999999
TID:              9999999999999
Terminal ID:      V9999999
Date / Time:      99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:              *************9999
Expiration:          ##/##
Transaction Type: Void          - $13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type:     Credit
Card Type:        MasterCard
Approval Code:    999999


Product Name                   $11.02
12345


       Agency Amount:   - $11.02
  LexisNexis Service Fee:   - $2.50

            Total Fee:   - $13.52



Cardholder Signature


X--------------------------------------------

            Merchant Copy
```

Note - Transactions using a VISA card will display 2 authorization lines:

VISA VOID RECEIPT - Agency Copy

VISA VOID RECEIPT - Agency Copy

```
                  Agency Name
                 Agency Address
              Agency City, State, Zip


MID:              999999
TID:              9999999999999
Terminal ID:      V9999999
Date / Time:      99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:           *************9999
Expiration:       ##/##
Transaction Type:
    Payment/Purchase/Sale      - $2.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type:     Credit
Card Type:        Visa
Approval Code:    999999

Card #:           *************9999
Expiration:       ##/##
Transaction Type:
    Payment/Purchase/Sale      - $1.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type:     Credit
Card Type:        Visa
Approval Code:    999999

Product Name                   $1.00
12345


              Agency Amount:   - $1.00
        LexisNexis Service Fee:  - $2.50

                   Total Fee:   - $3.50



Cardholder Signature


X-------------------------------------------

              Merchant Copy
```

How to Use VitalChek Product Suite

Step 8   Terminal prompts the user to select Yes or No and press the green **Enter** button to print the **Customer Receipt**

Step 9   The terminal prints the **Customer Receipt** and returns the user to the **Enter Operator ID** screen

```
                  Agency Name
                 Agency Address
              Agency City, State, Zip


MID:              999999
TID:              9999999999999
Terminal ID:      V9999999
Date / Time:      99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:           *************9999
Expiration:       ##/##
Transaction Type: Void          - $13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type:     Credit
Card Type:        MasterCard
Approval Code:    999999


Product Name                    $11.02
12345


           Agency Amount:   - $11.02
    LexisNexis Service Fee:  - $2.50

               Total Fee:    - $13.52



           Customer Copy
```

Note - Transactions using a VISA card will display 2 authorization lines:

VISA VOID RECEIPT - Customer Copy

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 9999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:   *************9999
Expiration: ##/##
Transaction Type:
    Payment/Purchase/Sale   - $2.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Card #:   *************9999
Expiration: ##/##
Transaction Type:
    Payment/Purchase/Sale   - $1.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Product Name $1.00
12345

        Agency Amount: - $1.00
LexisNexis Service Fee: - $2.50

        Total Fee: - $3.50

Customer Copy

How to Use VitalChek Product Suite

43   How to Print Last Receipt

How to Print Last Receipt	Users can reprint the last receipt that was printed on the POS terminal.

Step 1	User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal
	Note - if the Operator ID was entered incorrectly of does not have the authority for the transaction, an error message wiill be displayed

How to Use VitalChek Product Suite

Step 2   User is now logged on to the terminal and **Select Operation** screen displays

Step 3   Select **Print Last Receipt** option and press the green enter key

Step 4   The Agency Receipt will automatically print

```
                    Agency Name
                   Agency Address
               Agency City, State, Zip


    MID:            999999
    TID:            9999999999999
    Terminal  ID:   V9999999
    Date / Time:    99/99/99 99:99 AM EDT
    Confirmation #: 99999999

    Card #:         *************9999
    Expiration:     ##/##
    Transaction Type:
        Payment/Purchase/Sale    $13.52
    Transaction  Date:  99/99/99 99:99 PM EDT
    Payment Type:     Credit
    Card Type:        MasterCard
    Approval Code:    999999


    Product Name                $11.02
    12345


              Agency Amount:   $11.02
        LexisNexis Service Fee:   $2.50

                  Total Fee:    $13.52




    Cardholder Signature



    X-------------------------------------------------

                  Merchant Copy
```
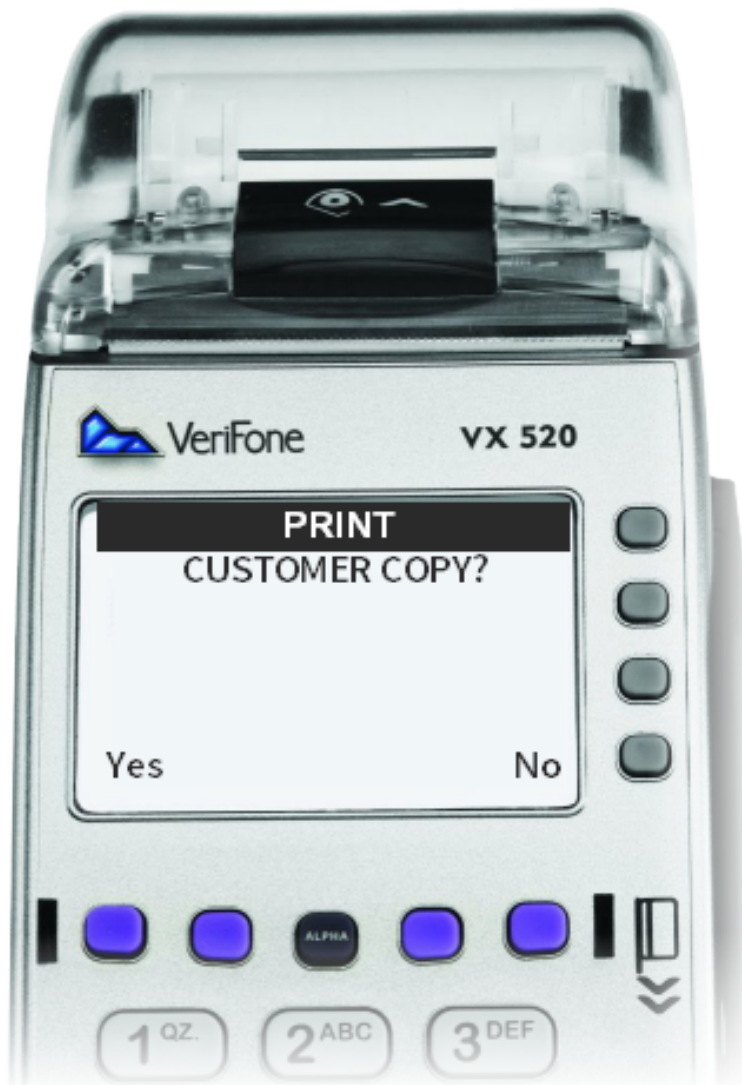
Note - Payment made with a Visa card will display 2 authorization lines:

How to Use VitalChek Product Suite

```
                    Agency Name
                   Agency Address
                Agency City, State, Zip


MID:                999999
TID:                9999999999999
Terminal ID:        V9999999
Date / Time:        99/99/99 99:99 AM EDT
Confirmation #:     99999999

Card #:             *************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale      $2.50
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:       Credit
Card Type:          Visa
Approval Code:      999999

Card #:             *************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale      $1.00
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:       Credit
Card Type:          Visa
Approval Code:      999999

Product Name                   $1.00
12345


          Agency Amount:      $1.00
    LexisNexis Service Fee:   $2.50

              Total Fee:      $3.50




Cardholder Signature



X----------------------------------------------

          Merchant Copy
```
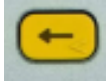
Step 5   The terminal will prompt the user to select Yes or No then the green enter button to print the customer copy of the receipt

Step 6   Customer receipt prints

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 9999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #:   99999999

Card #:   *************9999
Expiration: ##/##
Transaction Type:
    Payment/Purchase/Sale $13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name $11.02
12345

            Agency Amount: $11.02
    LexisNexis Service Fee: $2.50

                Total Fee: $13.52

            Customer Copy

Note - Payment made with a Visa card will display 2 authorization lines:

How to Use VitalChek Product Suite

```
                 Agency Name
                Agency Address
             Agency City, State, Zip


MID:                999999
TID:                9999999999999
Terminal ID:        V9999999
Date / Time:        99/99/99 99:99 AM EDT
Confirmation #:     99999999

Card #:             ************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale        $2.50
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:       Credit
Card Type:          Visa
Approval Code:      999999

Card #:             ************9999
Expiration:         ##/##
Transaction Type:
    Payment/Purchase/Sale        $1.00
Transaction Date:  99/99/99 99:99 PM EDT
Payment Type:       Credit
Card Type:          Visa
Approval Code:      999999

Product Name                     $1.00
12345


            Agency Amount:       $1.00
    LexisNexis Service Fee:      $2.50

                Total Fee:       $3.50




             Customer Copy
```

44   Point of Sale Keys

Point of Sale Keys   Additional keys are used periodically to initiate actions/jobs.

Key	Function	Action Required
	Cancel an un-submitted transaction	Press Cancel button
	Backspace to remove alpha or numeric characters	Press back button
	Type alpha characters	Press Alpha button
	Scroll to another screen	Press scroll button

45   Helpful Hints for POS

Helpful Hints   Tips for using your Point of Sale terminal

Please be aware that before every transaction, the cardholder is aware of the VCN fee and that the amount is correct before completing the application.

The VCN fee is added automatically, so when you are prompted to enter the transaction amount, do NOT include the VCN fee.

The yellow back button functions as a backspace
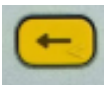
If you need to cancel out of a transaction before receiving an authorization number, press the red cancel button. You will be returned to the main entry screen.

To shut down the terminal and the PIN pad, ALWAYS unplug the power from the electrical outlet FIRST and then disconnect all the cables.

Cardholder PIN number must be at least 1 digits and no more than 6 digits.

If the debit network is down, a message will be displayed: "Debit Network Unavailable. Would you like to try another card?"

46   Troubleshooting Tips for POS

Troubleshooting Tips for POS (Point of Sale)

Problem - Error on the display screen states: **Main Error. Page Cannot be Opened**

Step 1	Press the F3 button
Step 2	Locate the **Go to Home Page** option by pressing the F1 button
Step 3	Once highlighted, press the green enter button
Step 4	The user will be returned to the **Enter Operator ID** screen

Problem - A new paper roll is needed.

Step 1	To insert a new paper roll, open the printer cover by pulling the release on the top of the cover
Step 2	Hold the roll of paper with the leading end coming from the botton of the roll and toward the front of the terminal then place into the paper roll cradle
Step 3	Close the printer cover making sure the leading edge of the paper remains on the outside, and that the lid has snapped down securely

Problem - No receipt tape is available.

The user will still be able to process transactions, however an error message will be received when the receipt attempts to print. Add more paper to the terminal, then press the green enter button to print the receipt.

User may also print a receipt from the VPS application.

Problem - a terminal needs to be restarted.

Step 1	Enter Operator ID and press the green enter button

Step 2   Select Operation screen displays, press #, then *, then green enter button

Step 2   Select Operation screen displays, press #, then *, then green enter button

47   Point of Sale Equipment

Point of Sale Equipment	There are several components that arrive in the box with your Verifone equipment.

Verifone VX520

Terminal

Verifone VX520 Power Supply

Verifone VX 805 Pin Pad

Verifone VX 805 Pin Pad Cord

Ethernet Cable

How to Use VitalChek Product Suite

48   How to Install Point of Sale Equipment

Point of Sale Equipment	There are several components that arrive in the box with your Verifone equipment.

Verifone VX520 Terminal

**Verifone
VX520 Power
Supply**

Verifone VX 805 Pin Pad

Verifone VX 805 Pin Pad Cord

Ethernet Cable

Step-by-Step Installation Guide

If you experience any issues while installing your equipment, please contact our Technical Help Desk:

Phone: 1-866-628-9244, option 3.

Email: vcn_helpdesk@vitalchek.com

Step 1	Turn the Verifone VX 520 terminal over and lift cover

Step 2	The ports are exposed

Step-by-Step Installation Guide

The pin pad cord comes connected in the RS-232 port.

Step 3   Connect the ethernet cable - insert into the ETH port

Step 4   Connect the power cord to the surge protector - once all 3 cables/cords are in place replace the rear cover on the terminal and plug-in the power cord to the surge protector

Step 5   Once the power cord is plugged in the terminal and pin pad will start up. The pin pad has powered up and shows Welcome, select VitalChek on the terminal by using the F2 or F3 button. The terminal will then go to the Operator ID screen

49   How to Reset a User's Password

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How to Reset a Users Password

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Administrators are able to reset user's passwords.

Users must have a role of **Administrator** to be able to view and access **Administration** functions.

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Step 1   From the **Administration** menu, select **User Maintenance. User Maintenance** screen is displayed

Step 2   Search for User by entering **First** and **Last Name** data.

Step 3   Click **Search**

Step   Search results are displayed. Click underlined **User Name** link

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Step 5 **Edit User** screen is displayed

Step 6 Enter a **New Password**

Step 9 Enter new password again in **Confirm Password** field

Step 10 Click **Save**

Step 11 **User Information saved successfully** message is displayed

Step When User logs into VPS, the **Change Password** screen will display

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Change Password

Old Password

New Password

Confirm Password

Change Password   Cancel

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How to Use VitalChek Product Suite