

1 Table of Contents

1.	Table of Contents	1-2
2.	Getting Started	3
2.1.	Welcome	3
2.2.	Agency Sign Off and User Set Up	3-4
2.3.	Accessing VPS Web B2B	4-7
2.4.	How to Login to VitalChek Product Suite - B2B	7
2.5.	How to Log out of VitalChek Product Suite	7-9
2.6.	How to Change a Password in VitalChek Product Suite	9-10
2.7.	Menu Items	10
2.8.	(Home) Change Password	10-11
2.9.	How to Reset a Forgotten Password	11-12
2.10.	How to Change an Expired Password	12-14
3.	Orders	15
3.1.	How to Enter Death Certificate Request	15-17
3.2.	How to Cancel a Request	17-18
3.3.	How to Reinstate a Cancelled Order	18-19
3.4.	How to Edit an Order	19
4.	Search	20
4.1.	Order Search Overview	20-21
4.2.	How to Search for Orders	21-22
5.	Reports	23
5.1.	View Report	23
5.2.	How to Requests Reports	23-25
5.3.	How to View Reports	25-26

2 Getting Started

2.1 Welcome



Welcome to the VitalChek Product Suite (VPS) Web Business to Business (B2B) Application!

This application was created to allow businesses to easily and securely place certificate orders.

Once the **Agency Signoff and User Setup form (Section 2.2)** has been processed, users will be able to login and use the B2B application.

New users can review the following help pages to learn how to use the system:

Accessing VPS Web B2B (Section 2.3)

How to Login to VitalChek Product Suite - B2B (Section 2.4)

How to Log out of VitalChek Product Suite (Section 2.5)

How to Enter a Death Certificate Request (Section 3.1)

How to Search for Orders (Section 4.2)

How to Request Reports (Section 5.2)

How to View Reports (Section 5.3)

A printable user guide can be found here: **User Guides (on-line documentation)**

2.2 Agency Sign Off and User Set Up

Agency Sign Off and User Set Up

Businesses will complete the Agency Sign Off and User Set up form and return to schambless@vitalchek.com to access the VitalChek LexisNexis Business to Business application



2.3 Accessing VitalChek Product Suite B2B User Interface



PC's must have internet access to use VPS.

Users must have a valid email address for Log-in and Account Registration.

VPS 2.0 is accessed through the URL: <http://agency.vitalchek.com/vpsweb2>

Open up firewall to **agency.vitalchek.com – ports 80 and 443** (as needed)

PC configuration:

- Recommended CPU – Dual-Core or higher
- Recommended Memory – 2GB or higher
- Required screen resolution – 1024x768 or higher
- Operating System - Windows 7 or higher

Supported Browsers:

The following **browsers** are supported:

Chrome: Latest version recommended

Firefox: Latest version recommended

Internet Explorer: IE8 and higher (see below for **Internet Explorer Compatibility Mode** alert)

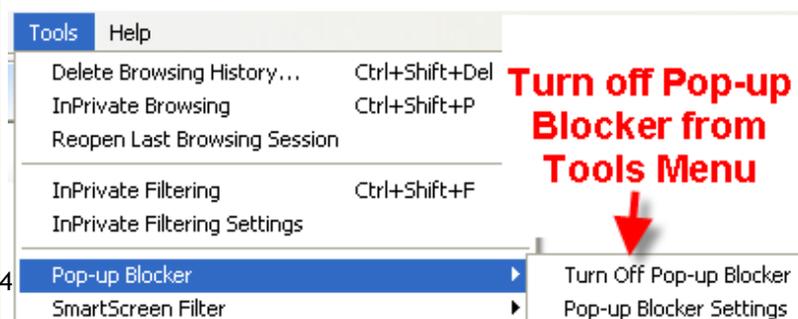
Note: When using Internet Explorer:

Pop-up blocker must be turned off

- or -

the VPS URL must be added to the list of trusted sites:

Pop-up blocker:



To add the **VPS URL to trusted sites**:

1. From the IE tools menu, select Internet Options
2. Select the Security tab
3. Click Trusted Sites
4. Click the Sites button
5. Click ""Add" to add the VPS web site to the list of trusted sites
6. Click "Close"
7. Click "OK"

Browser Errors

If the following error is displayed:

- **Unsupported Browser. VPSWeb 2.0 supports Internet Explorer 8 and higher, Firefox 4 and higher, Safari 5 and higher and any version of Chrome**

Complete the following:

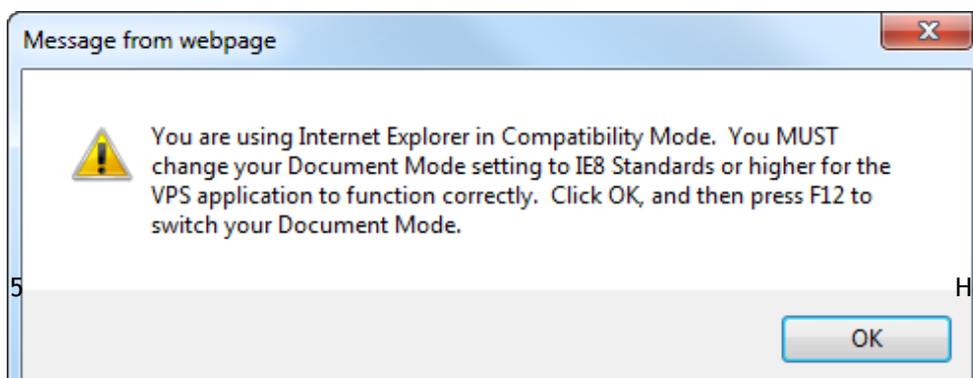
- A. Use a supported browser (see Supported Browsers section above)
- B. If using Internet Explorer, change the Internet Explorer Compatibility view setting with the following steps:
 1. Click the "Tools" menu option
 2. Click "Compatibility View Setting" to display the Compatibility View Settings box. If you have vitalchek.com or agency.vitalchek.com listed in the "Websites you've added to Compatibility View", click the Remove button to remove them. You may leave other websites that requires this mode.
 3. If checked, uncheck "Display all websites in Compatibility View"
 4. Click Close button

JAVASCRIPT must be enabled

Adobe Acrobat Reader must be installed to create/print shipping labels and receipts, and to view/download reports.

Internet Explorer Versions/Compatibility Mode Alert

* VPS Web will not display correctly using some versions of Internet Explorer in Compatibility Mode. The following Javascript alert will display when attempting to access VPS using unsupported Internet Explorer versions/compatibility modes. Use the chart below to determine the required actions to use VPS Web in Internet Explorer. When using an alternative browser such as Chrome or Firefox this is not an issue.

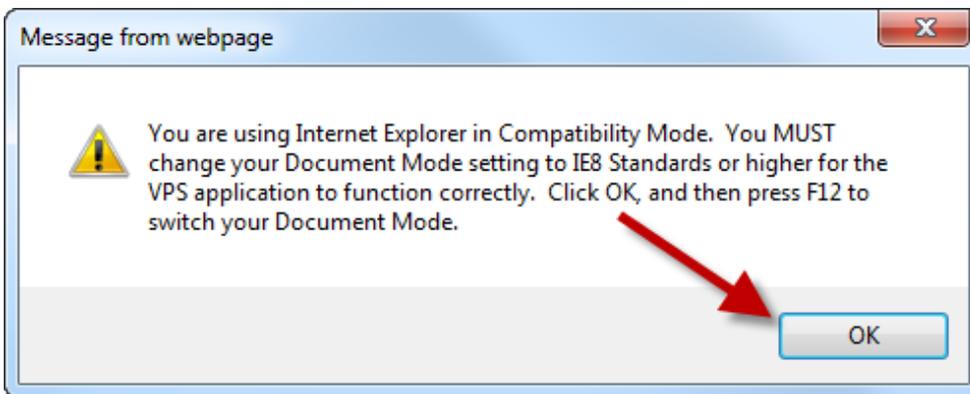


How to Use the VPS Web B2B Portal

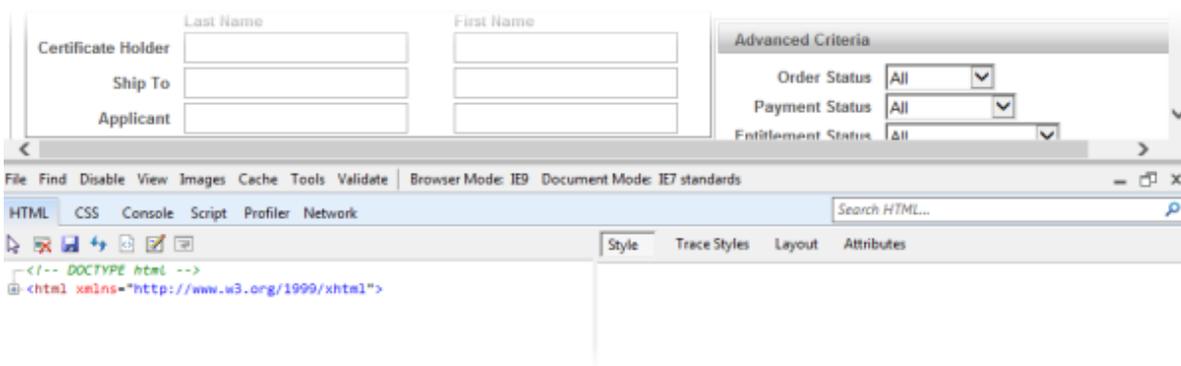
Internet Explorer (IE) Version	Alert	Solution
IE7 not supported	VPS does not supported IE7	Upgrade to latest version of IE
IE8 with IE7 Doc Standards	Compatibility Alert is displayed	Change Document Mode setting to IE8 or higher*
IE9 with IE7 Doc Standards	Compatibility Alert is displayed	Change Document Mode setting to IE8 or higher*
IE10 Compatibility Mode with IE7 Doc Standards	Compatibility Alert is displayed	Change Document Mode setting to IE8 or higher*

To change Document Mode settings:

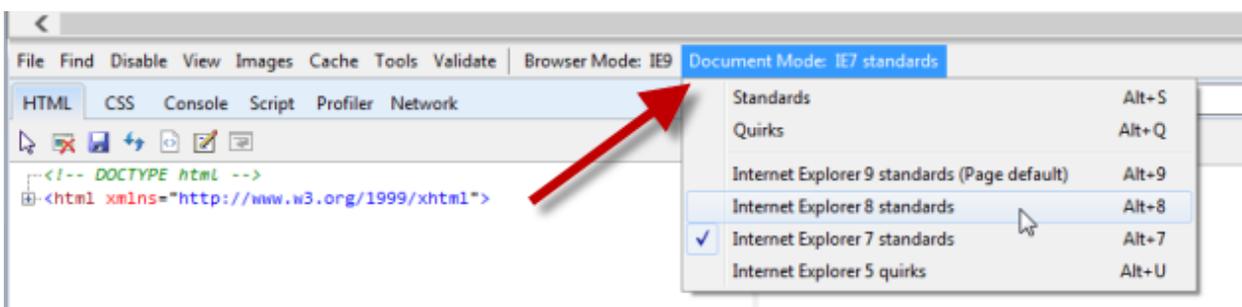
1. Click OK to close out the alert message



2. Press F12 button on keyboard to display options menus



3. Change document mode to IE 8 or higher



2.4 How to Login to VitalChek Product Suite

0

How to Login to VPS

Upon entering VitalChek Product Suite, the User will be presented with a [Enter Security Credentials](#) login page

VPS Version 2.0

Step 1

Enter **User ID**

User ID (email address)

Step 2

Enter **Password** (case-sensitive)

Password (case-sensitive)

Step 3

Click the **Login** box. If the User attempts to login unsuccessfully 5 times, user will be locked out and will need to reset password

Login

Step 4

After Login, VPS displays

2.5 How to Log out of VitalChek Product Suite

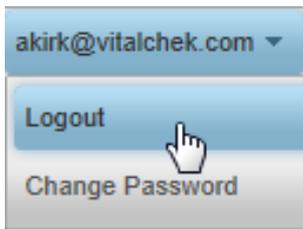
How to Log Out of VitalChek Product

Users can log out from any page in VPS by selecting [Logout](#)

7

How to Use the VPS Web B2B Portal

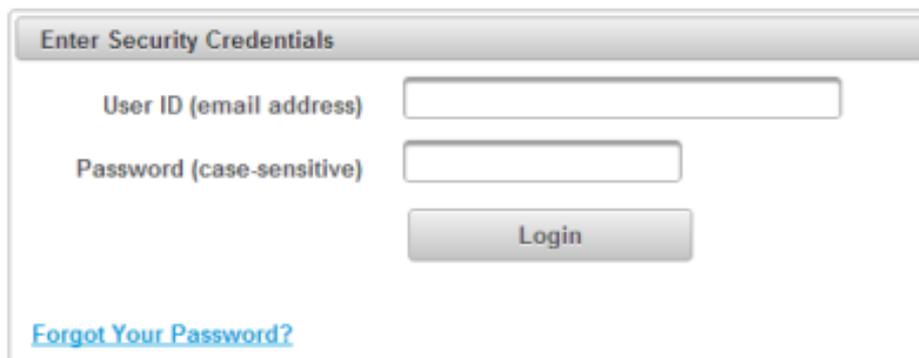
Suite



Step 1 Select **Logout** from the User Name menu

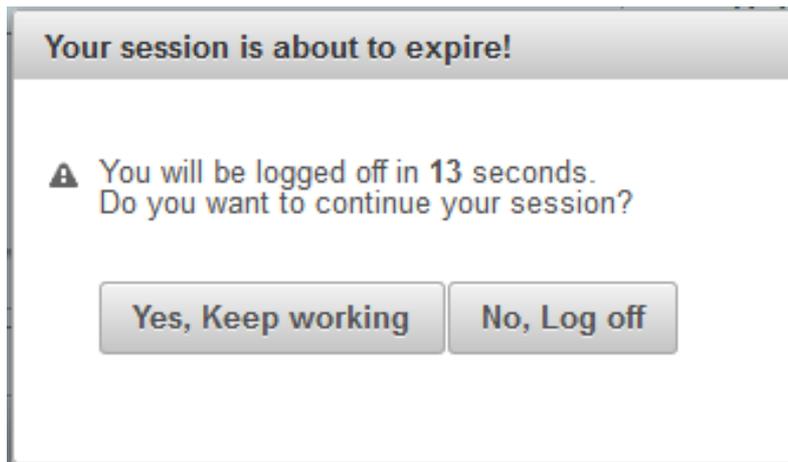


Step 2 User will be logged out of VitalChek Product Suite and will be returned to the login screen.



VPS Version 2.0

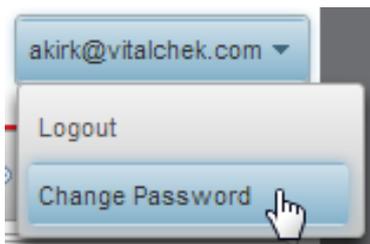
Inactivity Timeouts After 30 minutes of inactivity, the session expiration timer will display. Click **Yes, Keep working** to continue using VPS, if not clicked, the user will be automatically logged out of VPS.



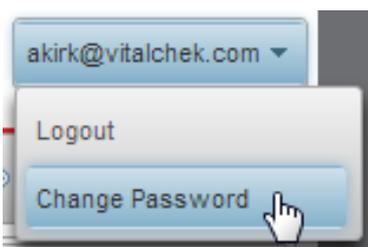
2.6 How to Change a Password in VitalChek Product Suite

How to Change a Password in VitalChek Product Suite

Users are able to change their VPS password at any time



Step 1 From the Home Menu, select [Change Password](#)

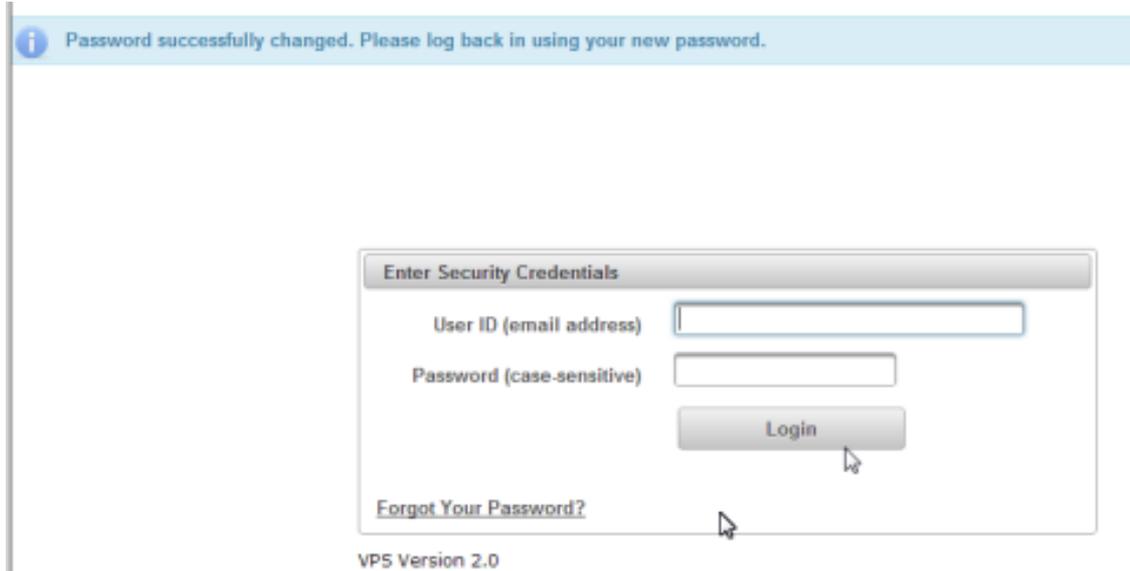


Step 2 User will be directed to the [Change Password](#) dialog box

A dialog box titled "Change Password". It contains three input fields: "Old Password", "New Password", and "Confirm Password". Below the input fields are two buttons: "Change Password" and "Cancel".

How to Use the VPS Web B2B Portal

- Step 3 Enter **Old Password**
- Step 4 Enter **New Password** using Password Rules
- Step 5 **Confirm Password**
- Step 6 Click **Change Password** button
- Step 7 **Password changed successfully** message appears



- Step 8 Enter **User ID**, (new) **Password** and click **Login** button to login to VPS

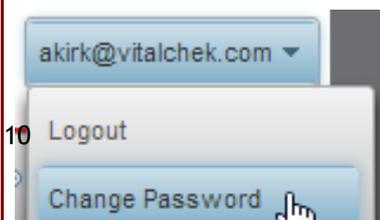
2.7 Menu Items

Main Menu - Menu items for Business to Business customers



2.8 (Home) Change Password

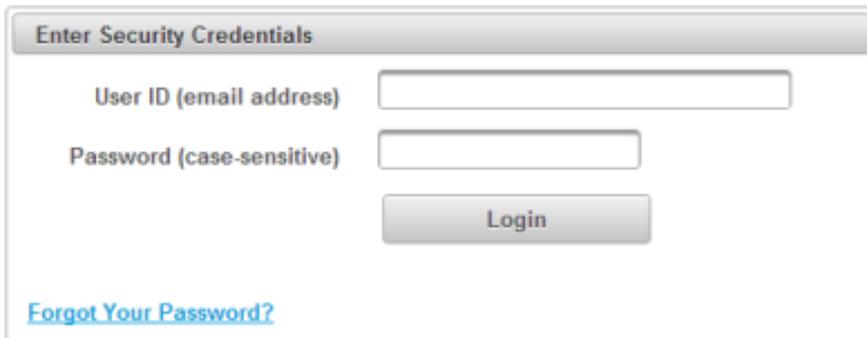
Change Password -User can change their password from any screen in VPS by selecting **Change Password** from the User Name menu



2.9 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

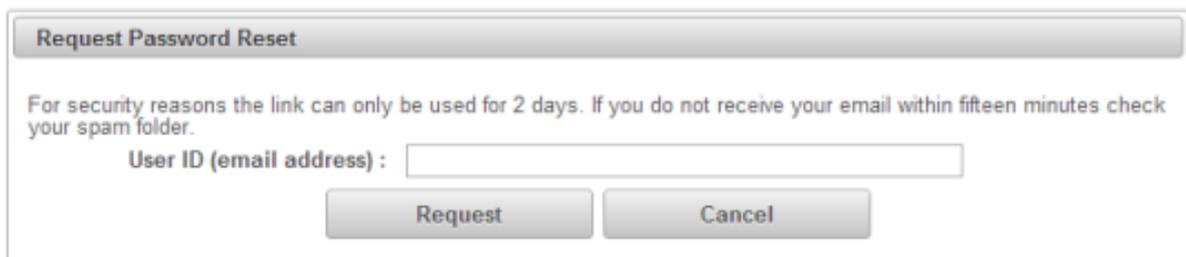


VPS Version 2.0

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



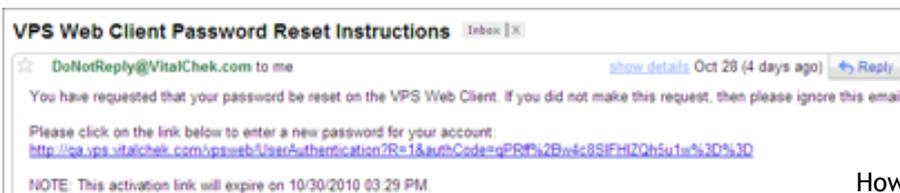
Step 4 Enter [User ID](#) (email address) if not prepopulated from login page.

Step 5 Click [Request](#) button

Step 6 Email confirmation message appears

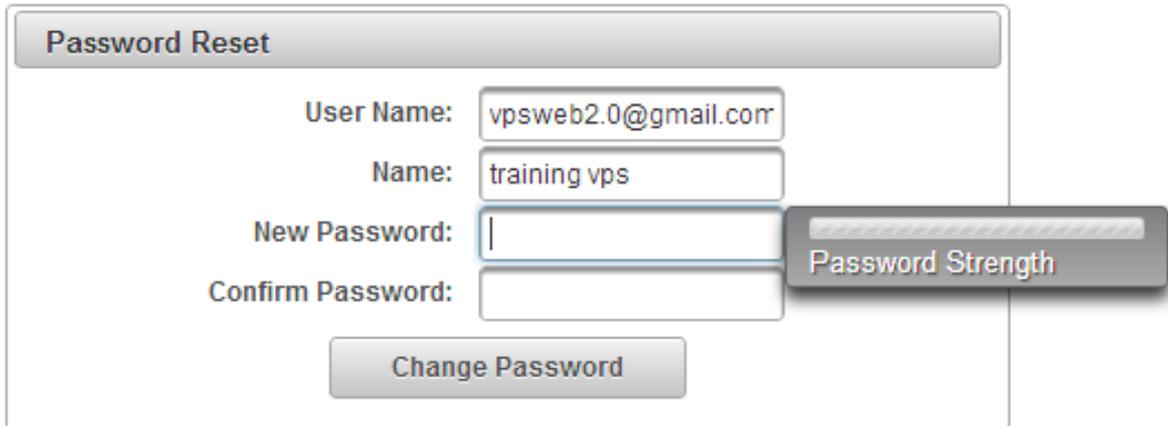
 **An email will be sent to this address with password reset instructions.**

Step 7 [VPS Password Reset Instructions](#) email is sent to User



How to Use the VPS Web B2B Portal

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



The screenshot shows a web form titled "Password Reset". It includes the following fields and elements:

- User Name:** vpsweb2.0@gmail.com
- Name:** training vps
- New Password:** (empty text box)
- Confirm Password:** (empty text box)
- Change Password:** (button)
- Password Strength:** (indicator bar on the right)

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*

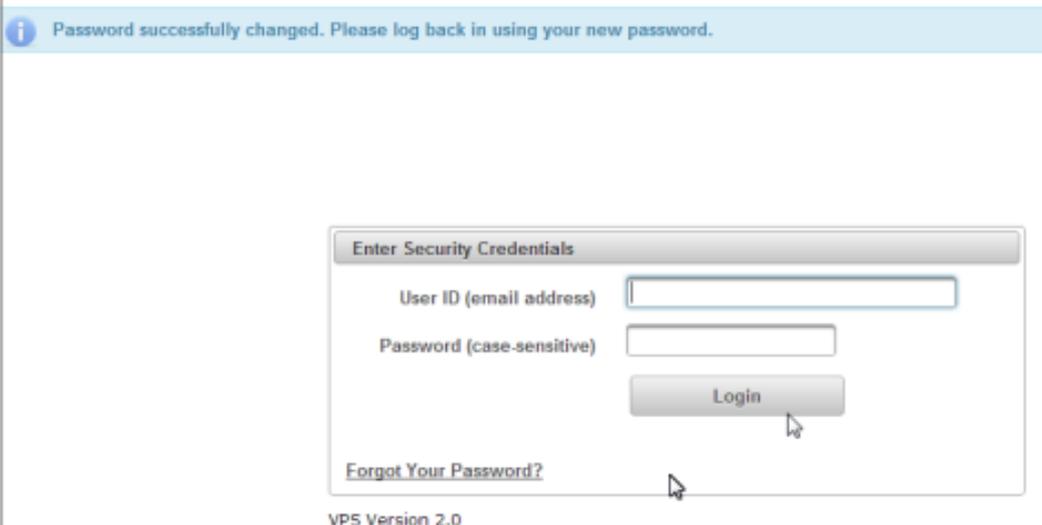
Step 10 Confirm **New Password**

Step 11 Click **Change Password** button

Step 12 **Success** message appears confirming **Password Reset Complete**

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

Step 13 Enter **User ID** and new **Password** to login



The screenshot shows the login page with the following elements:

- Success Message:** Password successfully changed. Please log back in using your new password.
- Form Title:** Enter Security Credentials
- User ID (email address):** (text box)
- Password (case-sensitive):** (text box)
- Login:** (button)
- Forgot Your Password?:** (link)
- Version:** VPS Version 2.0

2.10 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.



VitalChek Product Suite

 Your password is expired.

Change Password

Old Password

New Password

Confirm Password

- Step 1 Enter [Old Password](#)
- Step 2 Enter a [New Password](#)
- Step 3 Enter new password again in [Confirm Password](#)
- Step 4 Click [Change Password](#) button
- Step 6 User is returned to login screen; Password successfully changed message displayed

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

Enter Security Credentials

User ID (email address)

Password (case-sensitive)

[Forgot Your Password?](#)

3 Orders

3.1 How to Enter Death Certificate Request

How to Enter a Death Certificate Request

Information about the certificate(s) is entered into the [Death Certificate Request](#) section. Required fields are shaded in yellow.

Step 1 Enter a **Client Reference Number**, if applicable (this is any Funeral Home specific identifying number)

Client Reference Number

Step 2 Enter the **Certificate Holder Last Name**

Last Name

Step 3 Enter **Certificate Holder First Name**

First Name

Step 4 Enter **Middle Name**

Middle Name

How to Use the VPS Web B2B Portal

Step 5 Enter **Date of Death** in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.

Event Date (mm/dd/yyyy)

Step 6 Enter the **Place of Death - City**. This is the city where the death occurred.

City
Place of Death

Step 7 Enter the **County** where the death occurred

County

Step 8 Enter the **State** where the death occurred

State

Step 9 Enter the SSN for the decedent listed on the certificate

SSN

Step 10 Select a Gender of the decedent from the drop down list

Gender

Step 11 Enter the DOB for decedent the in mm/dd/yyyy format

DOB

Step 11 Enter the **Parent 1 Last Name** (if required) of the decedent listed on the certificate

Last Name
Parent 1

Step 12 Enter the **Parent 1 First Name** (if required) of the decedent listed on the certificate

First Name

Step 13 Enter the **Parent 1 Middle Name** (if required) of the decedent listed on the certificate

Middle Name

Step 14 Enter the **Parent 2 Last Name** (if required) of the decedent listed on the certificate

Parent 2

Step 15 Enter the **Parent 2 First Name** (if required) of the decedent listed on the certificate

First Name

Step 16 Enter the **Parent 2 Last Name** (if required) of the decedent listed on the certificate

Parent 2

Step 17 Click **Submit** to continue order to **Clear** to cancel

Request was successfully submitted message displays

Requests ▾ Reports ▾ Windham Professio

 Request was successfully submitted.

Death Certificate Request

Client Reference N

3.2 How to Cancel a Request

How to Cancel a Request

Certificate requests can be cancelled at any time until they have been submitted (10pm each business day.)

Step 1 Locate the order using the **Search** function and view it in the **Death Certificate Request** screen



Death Certificate Request

Client Reference Number

Last Name

First Name

Certificate Holder

Date of Death

City

County

State

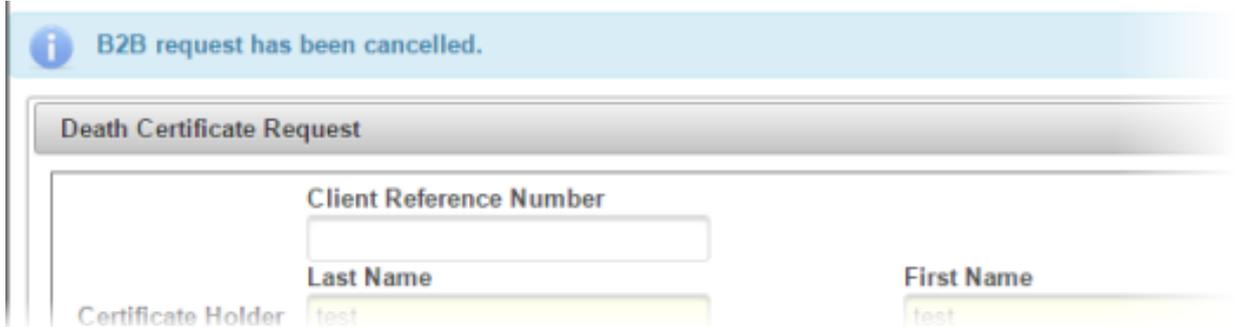
17

How to Use the VPS Web B2B Portal

Step 2 Click the **Cancel Request** button



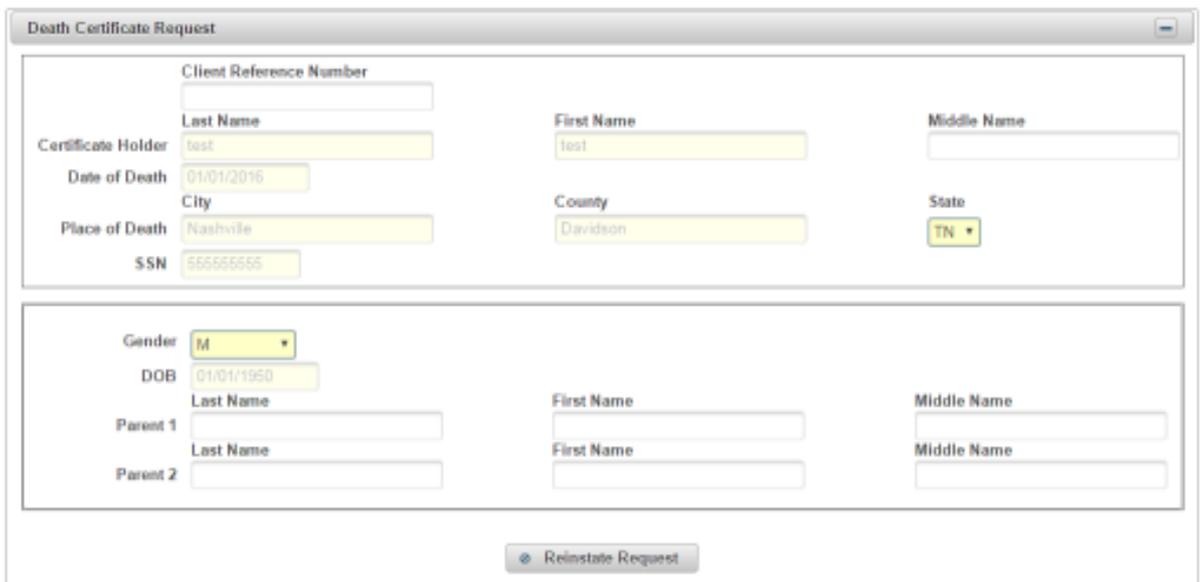
Step 3 **B2B request has been cancelled** message displays

A screenshot of a web application interface. At the top, a light blue banner contains an information icon and the text "B2B request has been cancelled." Below this is a grey header for a "Death Certificate Request" form. The form fields include "Client Reference Number", "Last Name", "First Name", and "Certificate Holder" (with the value "test").

3.3 How to Reinstate a Cancelled Order

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

Step 1 Locate the order using the **Search** function and view it in the **Death Certificate Request** screen

A screenshot of the "Death Certificate Request" form. It contains several input fields: "Client Reference Number", "Last Name", "First Name", "Middle Name", "Certificate Holder" (with value "test"), "Date of Death" (with value "01/01/2016"), "City" (with value "Nashville"), "County" (with value "Davidson"), "State" (with value "TN"), and "SSN" (with value "55555555"). There are also fields for "Gender" (with value "M"), "DOB" (with value "01/01/1950"), and fields for "Parent 1" and "Parent 2" (Last Name, First Name, Middle Name). A "Reinstate Request" button is located at the bottom of the form.

Step 2 Click the **Reinstate Order** button



Step 3 Order is reinstated and B2B request has been reinstated message displays

 B2B request has been reinstated.

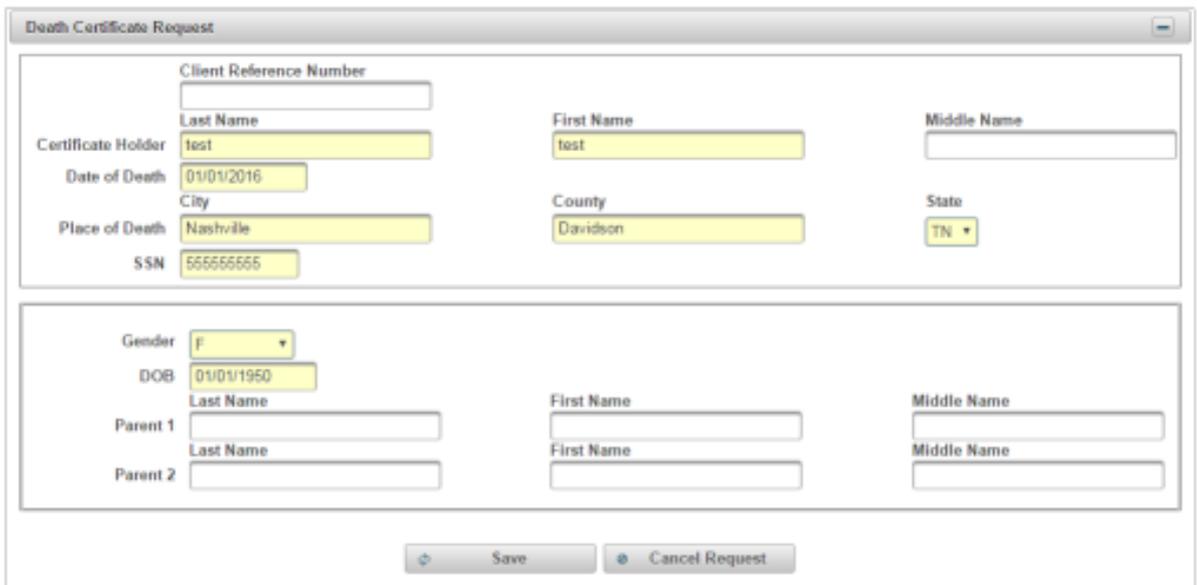
kirk

3.4 How to Edit an Order

How to Edit an Order

Certificate requests can be edited at any time until they have been submitted (10pm each business day.)

Step 1 Locate the order using the **Search** function and view it in the **Death Certificate Request** screen



The screenshot shows a web form titled "Death Certificate Request". The form is divided into two main sections. The top section contains fields for: Client Reference Number (empty), Certificate Holder (Last Name: test, First Name: test, Middle Name: empty), Date of Death (01/01/2016), Place of Death (City: Nashville, County: Davidson, State: TN), and SSN (55555555). The bottom section contains fields for: Gender (F), DOB (01/01/1950), and Parent information (Parent 1 and Parent 2, each with Last Name, First Name, and Middle Name fields). At the bottom of the form are two buttons: "Save" and "Cancel Request".

Step 2 Edit fields as needed, click **Save** button



4 Search

4.1 Order Search Overview

Order Search Opens from the [Request-Search](#) menu item

The screenshot shows a web application window titled "Search Requests". It is divided into two main sections: "Certificate Information" and "Request Information".

Certificate Information:

- Certificate Holder First Name:
- Certificate Holder Last Name:
- Certificate Holder Middle Name:
- Event Date:

Request Information:

- Rep ID:
- Start Date:
- End Date:
- Client Reference Number:
- B2B Status:

At the bottom of the form are three buttons: "Search", "Clear", and "Export".

Search Reports - Certificate Information

Certificate Holder First Name	The First Name of the person whose name is listed on the certificate
Certificate Holder Last Name	The Last Name of the person whose name is listed on the certificate
Certificate Holder Middle Name	The Middle Name of the person the order is being shipped to
Event Date	Date of the death listed on the certificate

Search Reports - Request Information

Rep ID	Drop down list of available Representatives who entered the order
Start Date	First date which to search for order
End Date	Last date which to search for orders
Client Reference Number	Funeral Home specific reference number
B2B Status	Drop down list of order Status': Agency fulfilled Awaiting data verification

Awaiting order verification
Cancelled
Create error
Data verified
Duplicate
Need more info
On hold - Awaiting Docs
On hold - Recent event
Order data verified
Sent to agency for processing
Sent to customer
Unable to process

Search	Search for orders based on selected criteria
Clear	Remove selection criteria
Export	Export search results to an excel spreadsheet

4.2 How to Search for Orders

How to Search for Orders Orders can be searched using the [Search Order](#) screen

The screenshot shows a web form titled "Search Requests". It is divided into two main sections: "Certificate Information" and "Request Information".

- Certificate Information:** Contains four input fields: "Certificate Holder First Name", "Certificate Holder Last Name", "Certificate Holder Middle Name", and "Event Date".
- Request Information:** Contains five input fields: "Rep ID" (a dropdown menu with "Select One" selected), "Start Date", "End Date", "Client Reference Number", and "B2B Status" (a dropdown menu with "Select One" selected).

At the bottom of the form, there are three buttons: "Search", "Clear", and "Export".

Step 1 From the **Requests** menu, select **Search**

How to Use the VPS Web B2B Portal

Step 2 **Search Order** screen is displayed

The screenshot shows a web form titled "Search Requests". It has two main sections: "Certificate Information" and "Request Information".
Under "Certificate Information", there are four input fields: "Certificate Holder First Name", "Certificate Holder Last Name", "Certificate Holder Middle Name", and "Event Date".
Under "Request Information", there are five input fields: "Rep ID" (a dropdown menu with "Select One" selected), "Start Date", "End Date", "Client Reference Number", and "B2B Status" (a dropdown menu with "Select One" selected).
At the bottom of the form are three buttons: "Search", "Clear", and "Export".

Step 3 Orders may be searched by:

Certificate Holder First/Last/Middle Name (Minimum of first 3 letters of the first name and first 3 letters of last name)

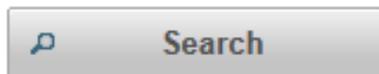
Event Date Date of the death

Rep ID The representative who requested the order

State Date/End Date date span

Client Reference Number Funeral Home specific identifying number

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

The screenshot shows the search results page. At the top, there is a search bar with "Search", "Clear", and "Export" buttons, and a checkbox for "Exclude Closed, Canceled and Declined Orders". Below the search bar is a table with 11 columns: Order Number, Order Date, Order Status, Payment Status, Product, Certificate Holder, Event Date, Applicant, Applicant Phone, Shipping Method, and Shipped. Two rows of data are visible. The first row has Order Number 13006142, Order Date 09/16/2013, Order Status Open, Payment Status Unsubmitted, Product Birth Certificate (City of Arlington), Certificate Holder Test Test, Event Date 03/12/1978, Applicant Casandra Test, Applicant Phone (615)-372-7524, Shipping Method UPS Air, and Shipped. The second row has Order Number 13006136, Order Date 09/16/2013, Order Status Open, Payment Status Paid in Full, Product Birth Certificate (City of Arlington), Certificate Holder Test Test, Event Date 03/12/1978, Applicant Casandra Test, Applicant Phone (615)-372-7524, Shipping Method UPS Air, and Shipped. The table is paginated, showing Page 1 of 1 and 15 records per page.

Order Number	Order Date	Order Status	Payment Status	Product	Certificate Holder	Event Date	Applicant	Applicant Phone	Shipping Method	Shipped
<u>13006142</u>	09/16/2013	Open	Unsubmitted	Birth Certificate (City of Arlington)	Test Test	03/12/1978	Casandra Test	(615)-372-7524	UPS Air	
13006136	09/16/2013	Open	Paid in Full	Birth Certificate (City of Arlington)	Test Test	03/12/1978	Casandra Test	(615)-372-7524	UPS Air	

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

5 Reports

5.1 View Report

View Report Contains information field to search available Reports

Report Drop down field with available reports to search

Create Date Field to enter dates to search

Search Button to begin search based on selected data

5.2 How to Requests Reports

How to Request Reports Users are able to request reports

Step From the [Reports](#) menu, select [Request Reports](#). [Request Reports](#) screen is displayed

How to Use the VPS Web B2B Portal

1

LexisNexis VitalChek Product Suite

akiri@vitalchek.com

Requests Reports Windham Professionals (43511)

Select Report B2B Order Audit Report

Request Report

Notify via email when request completed
 Include Report as attachment

Start Date 06/21/2016 End Date 06/21/2016

Submit Request Clear

Step 2 **Select Report** drop down selection defaults to **B2B Order Audit Report**

Select Report B2B Order Audit Report

Step 3 Choose to **Notify via email** when request is completed and/or **Include Report as attachment**

Request Report

Notify via email when request completed
 Include Report as attachment

Step 4 Enter the **Start Date** on which to begin the report but typing the date in the field or clicking to display the calendar

Start Date 05/26/2016

May 2016

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Step 5 Enter the **End Date** on which to begin the report by typing the date in the field or clicking to display the calendar

End Date 05/26/2016

Clear

May 2016

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14

24

Step 6 Click Submit Request to request the report



Step 7 Request is created and send to user's email with either notification of report completion or with report attached (if requested) and Request was successfully submitted message displays



5.3 How to View Reports

How to View Reports

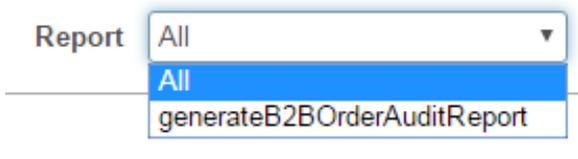
Users are able to view requested reports



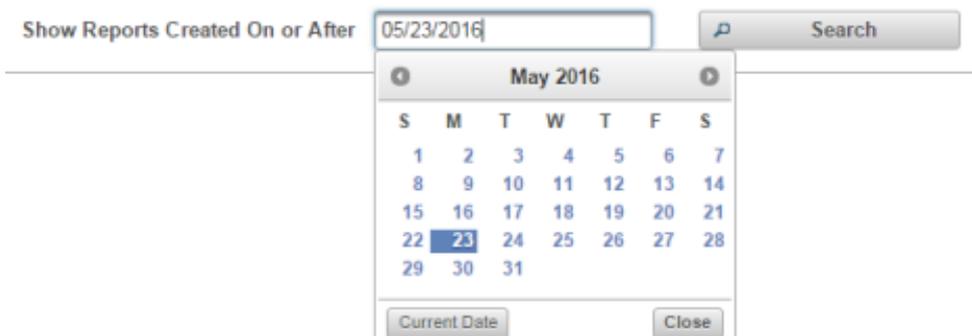
Step 1 From the [Reports](#) menu, select [View Reports](#). [Search Reports](#) screen is displayed



Step 2 Select type of report from the [Report](#) drop down selection

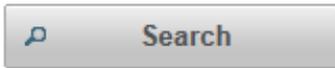


Step 3 Enter the [Show Reports Created On or After](#) date by entering date or clicking in the



How to Use the VPS Web B2B Portal

Step 4 Click Search button



Step 5 Available Reports are displayed

Search Reports

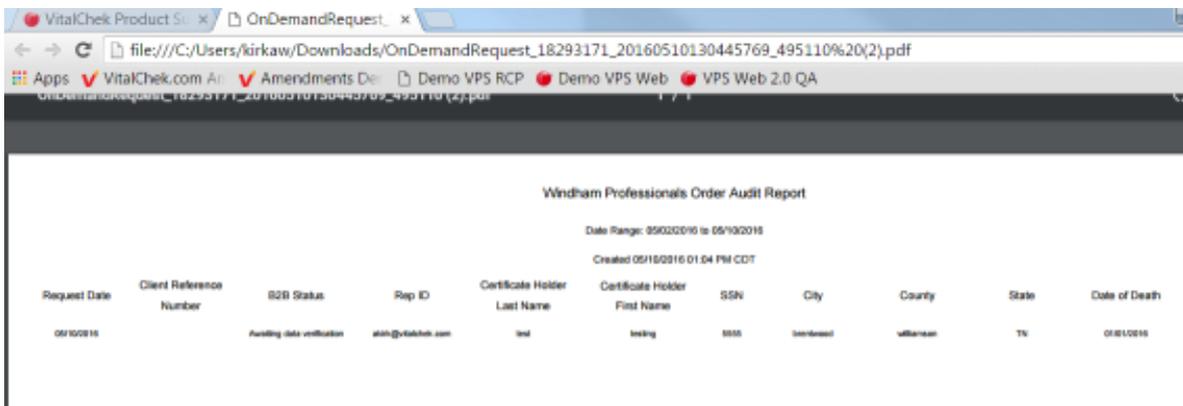
Report: All Show Reports Created On or After: 05/01/2016 Search

Page (1 of 1) 15 * [Total Records 2]

Create Date	Description	Job Schedule Code	Document Type
05/10/2016 01:04:46 PM CDT	generateB2BOrderAuditReport	OnDemandRequest_18293171_20160510	PDF
05/10/2016 01:21:25 PM CDT	generateB2BOrderAuditReport	OnDemandRequest_18293171_20160510	PDF

Page (1 of 1) 15 * [Total Records 2]

Step 6 Click highlighted **Create Date** to view and print reports in .pdf



6 User Guide

To access the user guide in PDF format, select a link below:

[VPS Web 2.0 B2B Ordering](#)