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2 How to Login to VitalChek Product Suite

How to Login to VPS

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

Enter Security Credentials

User ID (email address)

Password (case-sensitive)

Login

[Forgot Your Password?](#)

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

3 How to Print Batch Receipts

How to Print Batch Receipts

Receipts are created and printed using the Batch Receipts process
 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.

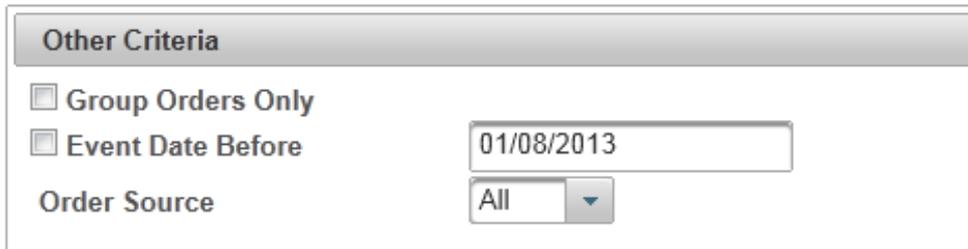
Step 2 Select the **Product(s)** to include in the batch.
Note - if user does not select any Products, all available will be included in the batch.

Step 3 Select **Delivery Method** to include in the batch.
Note - if user does not select any Delivery Methods, all available will be included in the batch.

How to Use the VitalChek Product Suite

Step 4 Select any **Other Criteria**.

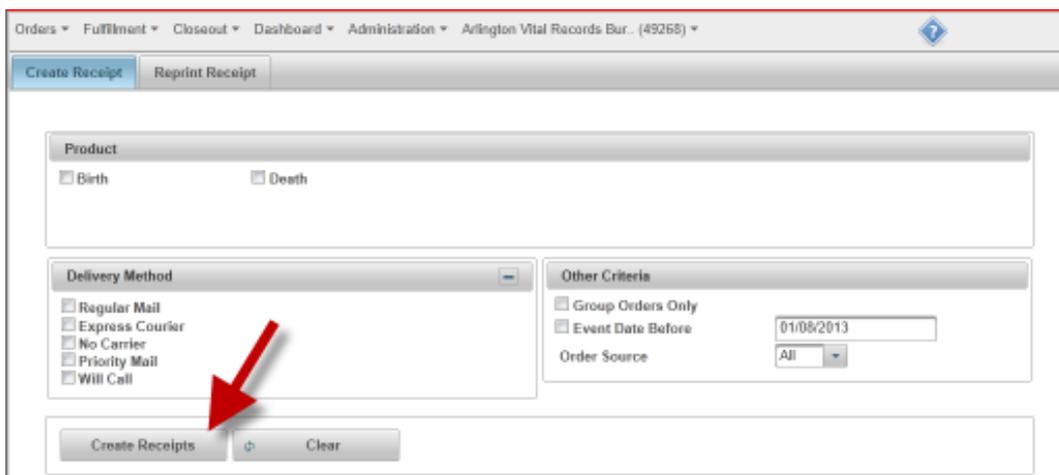
Note - if user does not select any **Other Criteria**, all available will be included in the batch.



The screenshot shows a form titled "Other Criteria" with the following fields:

- Group Orders Only
- Event Date Before: 01/08/2013
- Order Source: All (dropdown menu)

Step 6 Click **Create Receipts** button



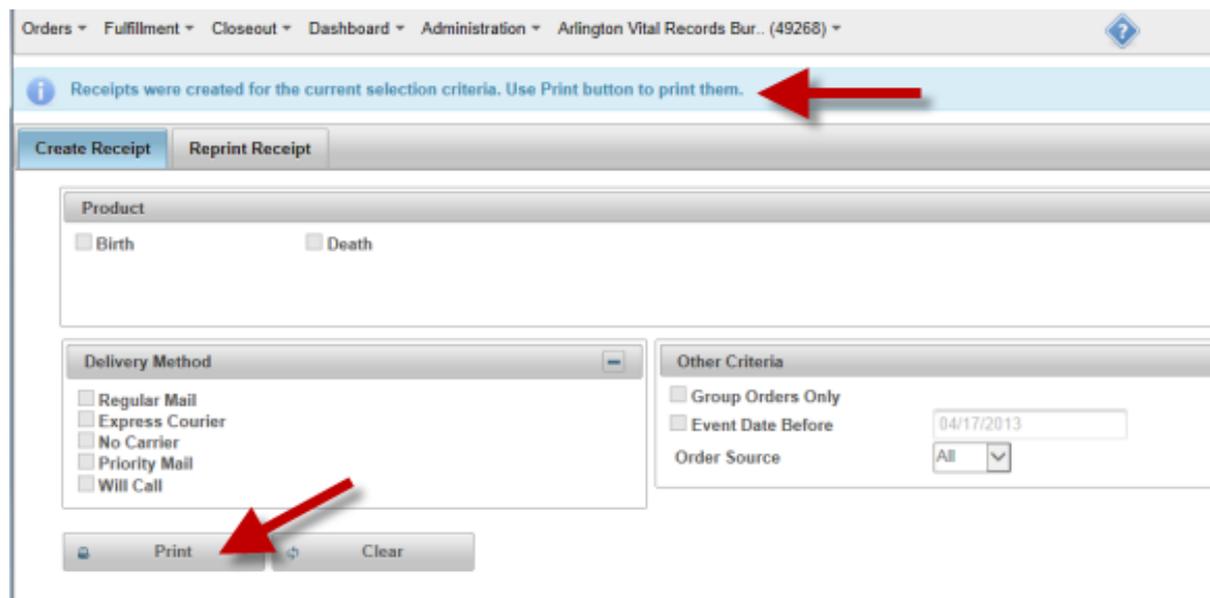
The screenshot shows the receipt creation interface with the following fields:

- Product: Birth, Death
- Delivery Method: Regular Mail, Express Courier, No Carrier, Priority Mail, Will Call
- Other Criteria: Group Orders Only, Event Date Before: 01/08/2013, Order Source: All (dropdown menu)

A red arrow points to the "Create Receipts" button.

Note - Once the user has clicked the **Create Receipts** button, all selection criteria (steps 2-4) will be locked and may only be changed after clicking the **Clear** button to clear the selections

Step 7 **Batch Receipts** are created and confirmation message displays, **Create Receipts** button is replaced with **Print** button.



The screenshot shows the receipt creation interface with a confirmation message at the top: "Receipts were created for the current selection criteria. Use Print button to print them." A red arrow points to this message. Below the message, the "Create Receipt" button is replaced by a "Print" button. The "Other Criteria" section now shows "Event Date Before" as 04/17/2013. A red arrow points to the "Print" button.

Click **Print** button to display receipts in .Pdf window

Step Receipts are displayed in a .Pdf

How to Use the VitalChek Product Suite

8

LexisNexis VitalChek Product Suite

Quick Search [] Client ID [] alirk@vitalchek.com

Orders ▾ Fulfillment ▾ Closeout ▾ Dashboard ▾ Administration ▾ Arlington Vital Records Bur. (49268) ▾

Receipts were created for the current selection criteria. Use Print button to print them.

BatchReceipt_10Jan2014144043CST.pdf - Adobe Reader

Order #	Certificate Requested	Event Date	Certificate Holder Name	Shipping Method
13063522	Birth Statewide (With Raised Seal)	1/1/1950	testing, test	UPS
13063523	Birth Statewide (With Raised Seal)	1/1/1950	testing, test	UPS

Scroll to view entire receipt

VitalChek Product: Birth Certificate
Method of Delivery: UPS Next Day Air

Authorization Code: n/a
Authentication Response:

Agency Fee: \$10.00
Other Agency Fee: \$0.00
Misc Fee: \$0.00
Shipping: \$17.50
VCN Handling: \$8.00
TOTAL ORDER FEE: \$35.50

Applicant Info:
Name: TEST PERSON -1
Address 1: 21 JAMES STREET
Address 2:
City: EAST SYRACUSE
State: NY
Zip/Postal: 13057
Country:
Email:
Phone: (555)-123-4567

Shipping Info:
Name: TEST PERSON -1
Address 1: 21 JAMES STREET
Address 2:
City: EAST SYRACUSE
State: NY
Zip/Postal: 13057
Country:
Phone: (555)-123-4567

Reason: EMPLOYMENT
Relationship: FATHER
Name on Certificate: TEST PERSON -1
Gender: MALE
Event Date: 3/7/1977
County of Event: BUTLER
City of Event: ABERDEEN
Hospital: ST. JOSEPH MOUNT STERLING
Father's Name: DAD PERSON -1
Mother's Name: MOM MOTHER -1

Document Type: BIRTH CERTIFICATE
Copies: 1 Agency Fee: \$10.00

VitalChek Receipt
Kentucky Office of Vital Statistics

Date / Time: 12/27/2010 01:40 PM
Order Number: 13017716
Line Item: 1 of 1
Certificate Type: BIRTH CERTIFICATE
Name on Certificate: TEST PERSON -1
Event Date: 3/7/1977
Number of Copies: 1
Applicant's Phone: (555)-123-4567

TEST PERSON -1
21 JAMES STREET
EAST SYRACUSE, NY 13057

Method of Delivery:
UPS Next Day Air

Authorization Code: n/a
Agency Fee: \$10.00
Other Agency Fee: \$0.00
Misc Fee: \$0.00
Shipping: \$17.50
VCN Handling: \$8.00
TOTAL ORDER FEE: \$35.50

7

How to Use the VitalChek Product Suite

Step 9 Click Print button to print receipts



Step 10 Click red X to close out of the .Pdf

Order #	Certificate Requested	Event Date	Certificate Holder Name	Shipping Method
13003522	Birth Statewide (With Raised Seal)	1/1/1950	testing, test	UPS
13003523	Birth Statewide (With Raised Seal)	1/1/1950	testing, test	UPS

Step 11 User is returned to VPS, **Create Receipts** screen

Product: Birth Death

Delivery Method: Regular Mail Express Courier No Carrier Priority Mail Will Call

Other Criteria: Group Orders Only Event Date Before: 04/17/2013 Order Source: All

Print Clear

*Note - If receipt criteria was selected (step 2, 3 or 4 above) - to print additional receipts with new criteria/selections - click the **Clear** button to clear current selections and then repeat steps 6 - 10. Previous selections will remain checked until the **Clear** button is*

clicked.

4 How to Create Batch Receipts Using a Saved Config

How to Create Batch Receipts using a Saved Config

Saved configs can be used to create batch receipts.

Users must have a role of **Supervisor** or **Manager** to be able to view and access **Batch Receipts**.

Config ID	Seq No	Saved Config Name	Actions
6	1	Group Orders Expedited	
1	2	Birth Expedited	
2	3	Stillbirth Expedited	
3	4	Death Expedited	
4	5	Marriage Expedited	
5	6	Divorce Expedited	
12	7	Group Orders Regular	
7	8	Birth Regular	
8	9	Stillbirth Regular	
9	10	Death Regular	
10	11	Marriage Regular	
11	12	Divorce Regular	

Step 1 From the **Fulfillment** menu, select **Batch Receipts**. Opens on **Create Receipt** tab. Agencies that have saved config options will display the **Saved Configs** table

Create Receipt Reprint Receipt Reprint Receipt Summary

Config ID	Seq No	Saved Config Name	Actions
6	1	Group Orders Expedited	
1	2	Birth Expedited	
2	3	Stillbirth Expedited	
3	4	Death Expedited	
4	5	Marriage Expedited	
5	6	Divorce Expedited	
12	7	Group Orders Regular	
7	8	Birth Regular	
8	9	Stillbirth Regular	
9	10	Death Regular	
10	11	Marriage Regular	
11	12	Divorce Regular	

Create Receipts Clear

Product

Birth Death Marriage Divorce

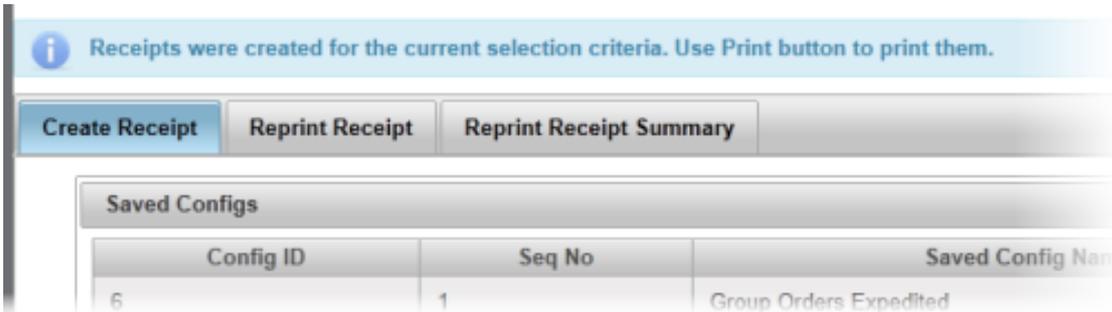
Step 2 There are 2 ways to create Batch Receipts:

1. Individual Saved Configs:

Click the **Arrow** icon from the Actions column to create to the receipts from the selected column



The Receipts created message displays



Click the **Create Receipts** button to display the selected receipts

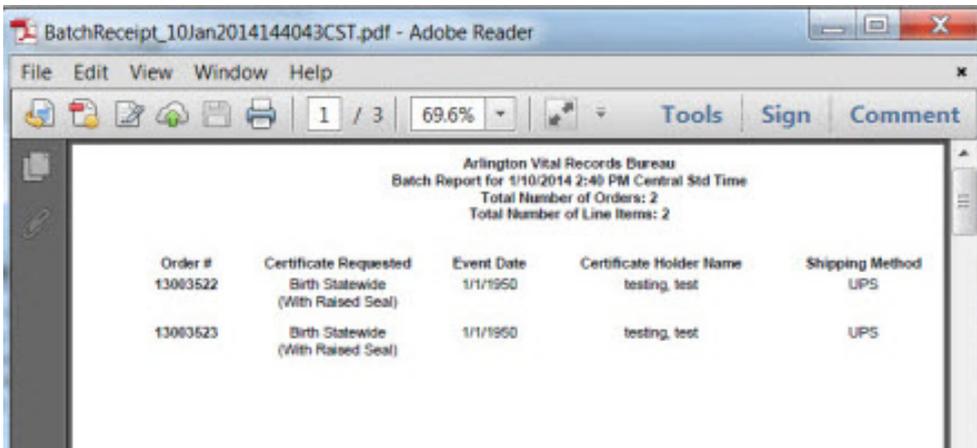


2. All Receipts

Click the **Create Receipts** button to display all available receipts



Step 3 **Batch Report and Receipts** are created and displays in .pdf window



How to Use the VitalChek Product Suite

Step 4 Print Batch Receipts by clicking on printer icon



5 How to Reprint a Batch Receipt

How to Reprint a Batch Receipt

Receipts that have been previously batched and printed can be reprinted using the [Reprint Receipt](#) tab.

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](#). [Create Receipt](#) tab is displayed.

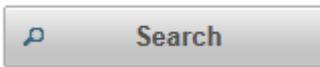
Step 2 Click [Reprint Receipt](#) tab

Step 3 Manually enter search date to [Show Batches Created](#) after that date, or use the calendar icon to select a date

Su	Mo	Tu	We	Th	Fr	Sa
		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		

How to Use the VitalChek Product Suite

Step 4 Click **Search** button



Step 5 Available receipts for the selected date are displayed in the **Search Results** window; click on image icon to display receipts in .pdf

Search Results

Show Batches Created On

Page	(1 of 1)	1	15	(Total Records 2)
	Batch ID	Batch Print Date Time	Receipts in Batch	User
	1038706	01/10/2014 02:40:13 PM CST	2	Allison K.
	1038705	01/10/2014 02:31:26 PM CST	2	Allison K.
Page	(1 of 1)	1	15	(Total Records 2)

Click to display (with red arrow pointing to the image icon in the first row)

Step 6 **Batch Report** will display in .pdf window

BatchReceipt_10Jan2014144043CST.pdf - Adobe Reader

Arlington Vital Records Bureau
Batch Report for 1/10/2014 2:40 PM Central Std Time
Total Number of Orders: 2
Total Number of Line Items: 2

Order #	Certificate Requested	Event Date	Certificate Holder Name	Shipping Method
13003522	Birth Statewide (With Raised Seal)	1/1/1950	testing, test	UPS
13003523	Birth Statewide (With Raised Seal)	1/1/1950	testing, test	UPS

VitalChek

Product: Birth Statewide (With Raised Seal)
Method of Delivery: UPS Air

Arlington Vital Records Bureau
Order Number: 13003522
Order Source: Phone
Date / Time: 1/10/2014 02:39 PM CST
Line Item: 1 of 1
Operator: AllisonK

Authorization Code: TestOK
Authorization Response:

Agency Fee:	\$23.00
Other Agency Fee:	\$0.00
Misc Fee:	\$0.00
Shipping:	\$18.00
VCN Handling:	\$12.55
Total Order Fees:	\$53.55

Applicant info:
Name: TEST TESTING
Address 1: 12 ANY ST
Address 2:
City: EAST SYRACUSE
State: NY
Zip/Postal: 13057
Email:
Phone: (555)-555-5555

Shipping info:
Name: TEST TESTING
Address 1: 12 ANY ST
Address 2:
City: EAST SYRACUSE
State: NY
Zip/Postal: 13057
Phone: (555)-555-5555

Reason: INCOME TAX
Relationship: SELF
Name on Certificate: TEST TESTING
Gender: FEMALE
Event Date: 1/1/1950
County of Event: HALE
City of Event: ABERNATHY
Father's Name: DAD DADS
Mother's Maiden Name: MOM MOTHERS

Document Type: BIRTH STATEWIDE (WITH RAISED SEAL)
Copies: 1 Agency Fee: \$23.00

Step Reprint Batch Receipt(s) by clicking on printer icon

4



How to Use the VitalChek Product Suite

6 How to Reprint a Batch Receipt Summary

How to Reprint a Batch Receipt Summary

Note - Reprint Receipt Summary tab only displays for agencies with a scheduled job for batch receipts.

Receipts that have been previously batched and printed can be reprinted using the [Reprint Receipt](#) tab

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](#). [Create Receipt](#) tab is displayed.

The screenshot shows the 'Create Receipt' tab with the following options:

- Product:** Birth, Death, Marriage, Divorce
- Delivery Method:** Regular Mail, Express Courier, No Carrier
- Other Criteria:** Group Orders Only, Event Date Before: 12/30/2010

Buttons: Create Receipts, Clear, Save As

Step 2 Click [Reprint Receipt Summary](#) tab

The screenshot shows the 'Reprint Receipt Summary' tab with the following search options:

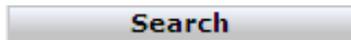
- Search field: Show Summaries for Batches Created After 12/30/2010
- Search button: Search
- Search Results table header: Document ID, Create Date, Comments, Printed

Step 3 Manually enter search date to [Show Batches Created After](#) that date, or use the calendar icon to select a date

The screenshot shows a calendar for January 2011 with the date 01/07/2011 selected. The calendar includes navigation arrows, a close button (x), and a 'Clean' button.

Step 4 Click [Search](#) button

4



Step 5 [Search Results](#) are displayed

5

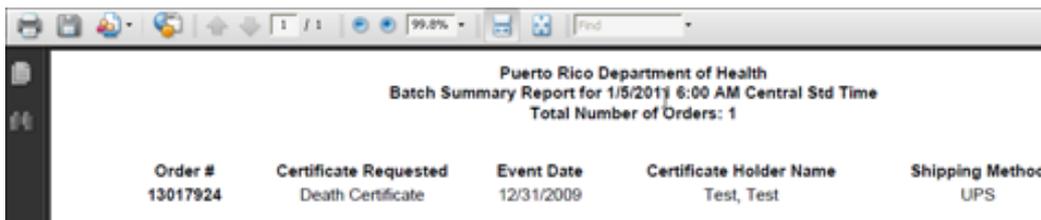


Step 6 Click [Document ID](#) number link to select Batch to reprint summary.

6

Step 7 [Batch Summary Report](#) will display in a .pdf

7



Step 8 Click printer icon to print report

8



7 How to Ship Funeral Home Orders

How to Ship Funeral Home Orders

Orders placed using the Funeral Home Portal (Web Portal) may contain multiple certificates. Orders may be shipped via UPS or the United States Postal Service (USPS)



LexisNexis®



VitalChek Funeral Home Portal

Priority Mail Orders w/Delivery Conf. (USPS):

When shipping certificates for Funeral Home Portal orders sent via Priority Mail w/Delivery Conf. please use the following guidelines:

1 envelope per VPS order, address labels must be handwritten

Orders with 1 - 50 certificates will be mailed in *letter envelopes*

Orders with 51- 100 certificates will be mailed in *legal envelopes*

UPS Shipping:

When shipping certificates for Funeral Home portal orders sent via UPS please use the following guidelines: .

1 envelope per VPS order, address labels will be generated in VPS

Orders with 1 - 50 certificates will be mailed in *letter envelopes*

Orders with 51- 100 certificates will be mailed in *legal envelopes*

8 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.

NOTE - Funeral Home Portal orders (Web Portal) are not able to be generated using VPS, UPS labels for these orders must be hand written. See [How to Ship Funeral Home Orders \(Section 7\)](#) for more info.

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

1

Step 2 Enter **Order Number** and click **Submit** button

2

*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. Check box will be checked to generate shipping label

3

	Order Number	Tracking Number/Status	Certificate Holder	Ship To	Shipping Address
<input checked="" type="checkbox"/>	13004991		test testing	test testing	12 Any St

Step 4 Click Generate Labels button

4

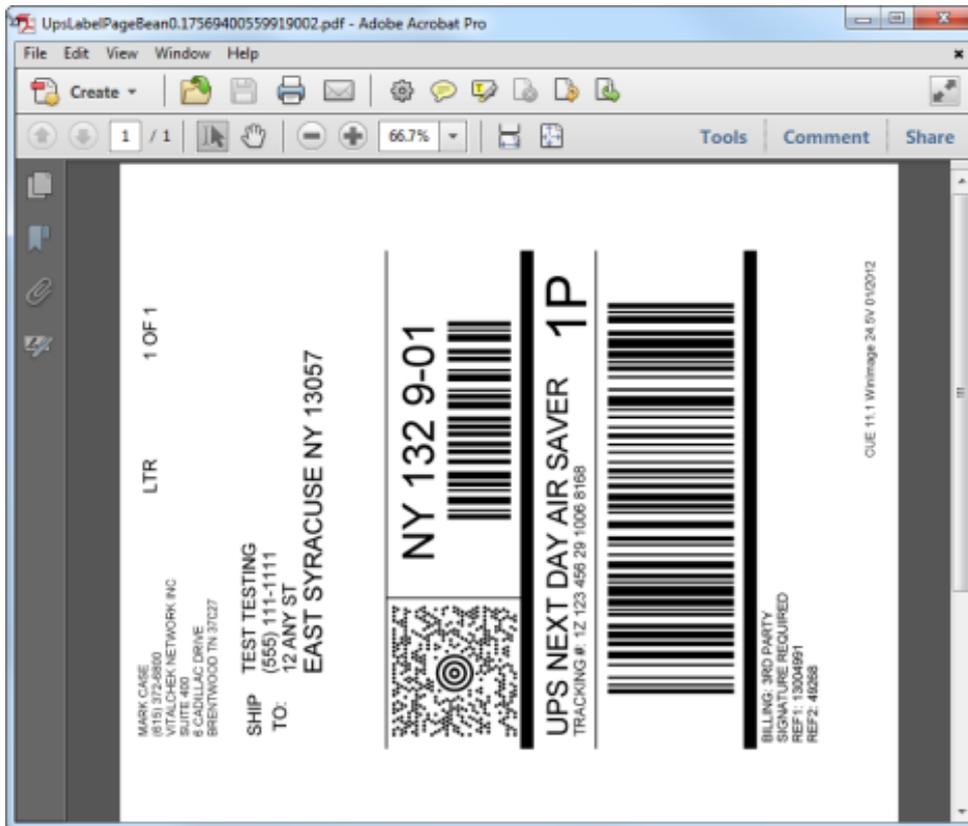
Step 5 Shipping label message is displayed; click **Print** button

5

How to Use the VitalChek Product Suite

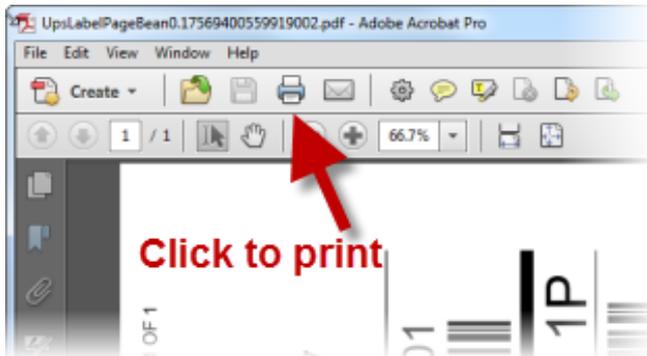
Step 6 Shipping label will generate and appear in a pdf window

6



Step 7 Click printer icon to print label(s)

7



9 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

The screenshot shows the 'Shipping Labels' interface with the 'Void Labels' tab selected. The interface includes a 'Generate Labels' tab, a 'Void Labels' tab, and tabs for 'UPS Manifest', 'Mail', and 'Will Call'. Below the tabs is an 'Order Number' input field and a 'Submit' button. To the right, it shows 'Order Count 0'. Below this is a table with columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. A 'Cancel' button is located at the bottom left.

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

The screenshot shows the 'Shipping Labels' interface with the 'Generate Labels' tab selected. The interface includes a 'Generate Labels' tab, a 'Void Labels' tab, and tabs for 'UPS Manifest', 'Mail', and 'Will Call'. Below the tabs is an 'Order Number' input field and a 'Submit' button. To the right, it shows 'Order Count 0'. Below this is a table with columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. A 'Clear' button is located at the bottom left.

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

The screenshot shows the 'Shipping Labels' interface with the 'Void Labels' tab selected. The interface includes a 'Generate Labels' tab, a 'Void Labels' tab, and tabs for 'UPS Manifest', 'Mail', and 'Will Call'. Below the tabs is an 'Order Number' input field and a 'Submit' button. To the right, it shows 'Order Count 0'. Below this is a table with columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. A 'Cancel' button is located at the bottom left.

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

The screenshot shows the 'Shipping Labels' interface with the 'Void Labels' tab selected. The 'Order Number' input field is now populated with a value. The 'Submit' button is highlighted, indicating it has been clicked. The rest of the interface remains the same.

Step 4 Order is displayed in the table with check box checked by default

The screenshot shows the 'Shipping Labels' interface with the 'Void Labels' tab selected. The table now displays one order with a checked checkbox in the first column. The 'Order Count' is now 1. Below the table are 'Void Labels' and 'Cancel' buttons.

	Order Number	Tracking Number/Status	Certificate Holder	Ship To	Shipping Address
<input checked="" type="checkbox"/>	13004991	1Z1234562910068168	test testing	test testing	12 Any St

How to Use the VitalChek Product Suite

Step 6 Click Void Labels button

6



Step 7 Labels voided successfully message appears

7

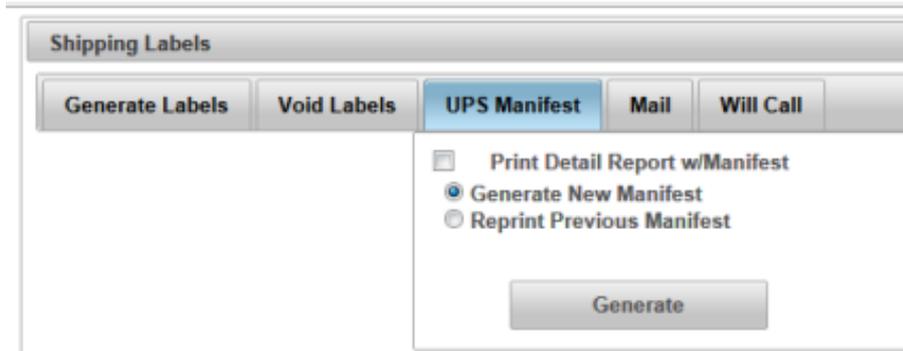


10 How to Print a Detail Report with Manifest

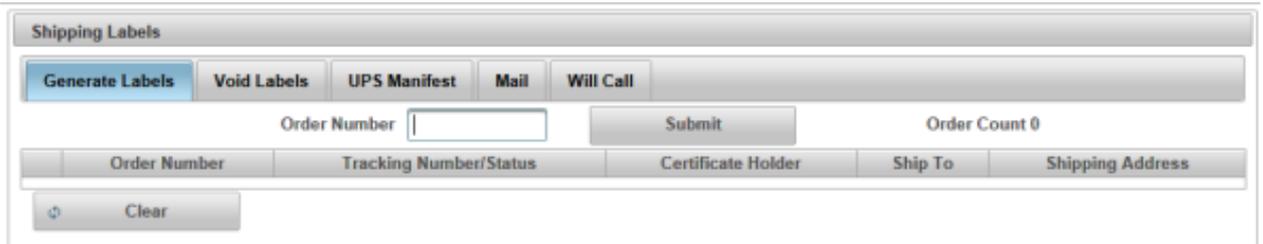
How to Print a Detail Report with a UPS Manifest

The User can generate and print a **Detail Report** with a **UPS Manifest** from the **UPS Manifest** tab.

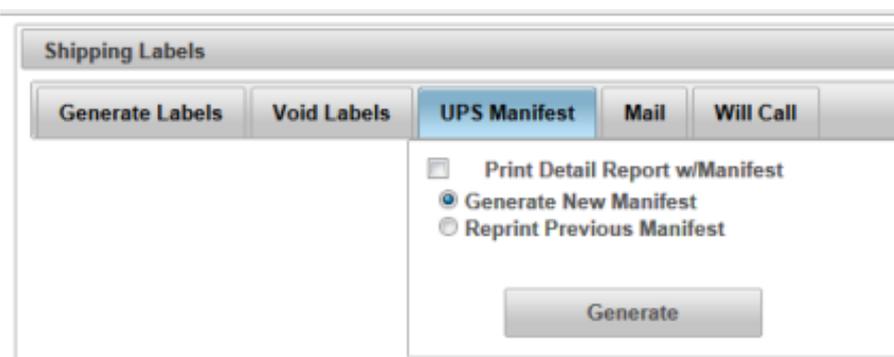
Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.



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**



How to Use the VitalChek Product Suite

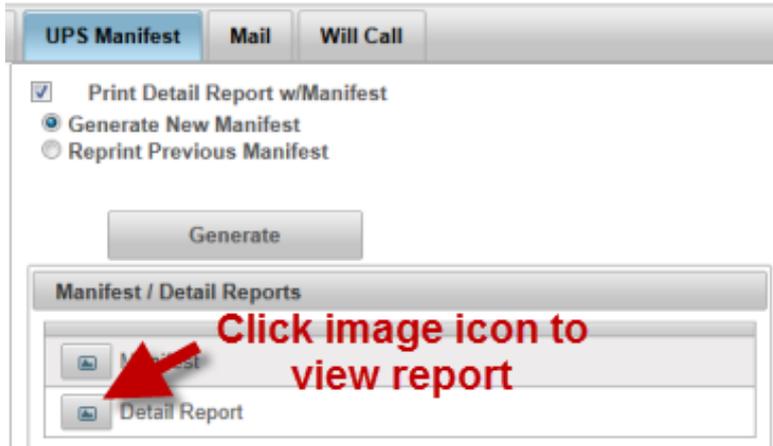
Step 4 Click [Generate](#) button

4



Step 5 Manifest/Detail Reports window displays

5



Step 6 [Detail Shipping Report](#) displays in .pdf

6



Step 7 Click printer icon to print

7



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

8

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.

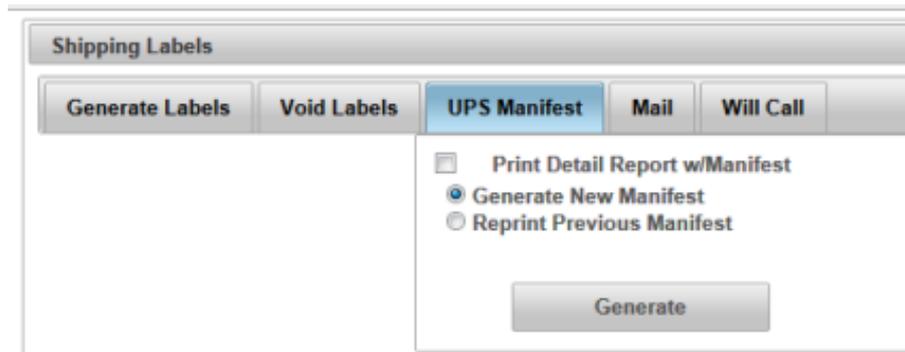
11 How to Generate a New UPS Manifest

How to Generate a New UPS Manifest

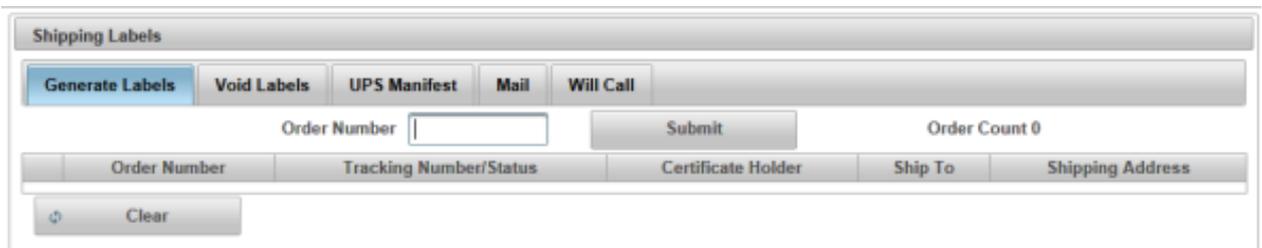
The User can generate and print a **UPS Manifest** from the **UPS Manifest** tab.

Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

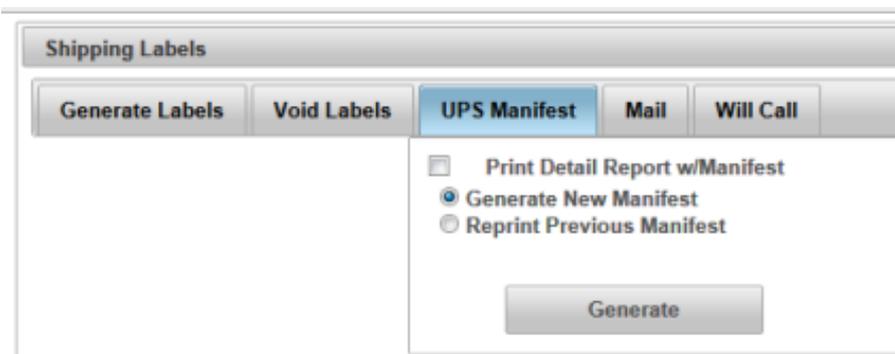
When a manifest is created, an email is sent, notifying the customer their order has been shipped.



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.



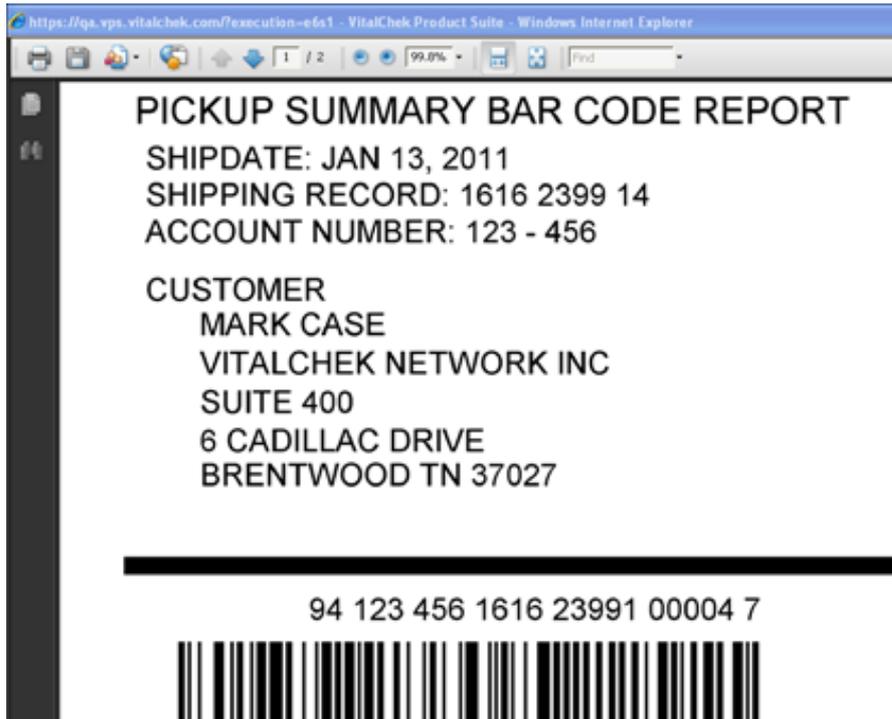
Step 3 Click **Generate** button



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>

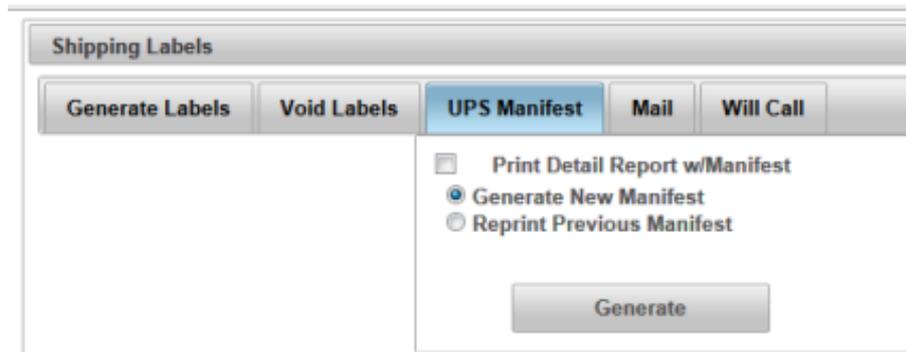
Please do not reply to this e-mail as it is generated automatically and replies are not monitored.

12 How to Reprint a Previous UPS Manifest

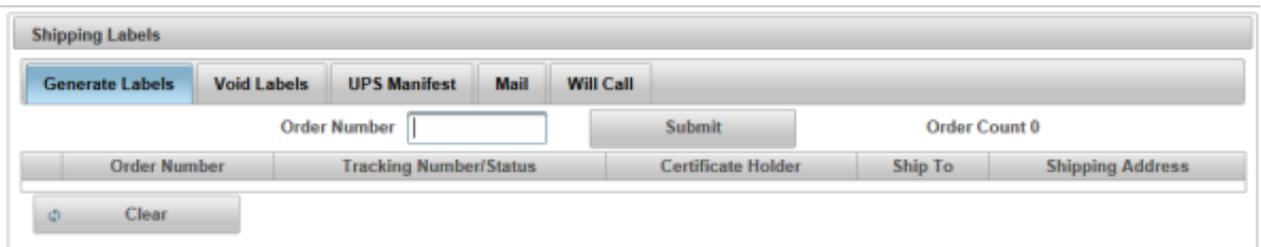
How to Reprint a Previous UPS Manifest

The User can generate and print a [Previous UPS Manifest](#) from the [UPS Manifest](#) tab

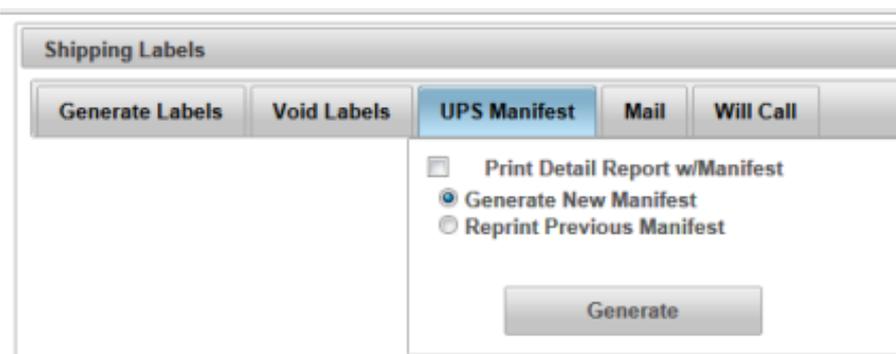
Users must have a role of [Clerk](#), [Supervisor](#) or [Manager](#) to be able to view and access [Shipping](#) functions



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 3 Check [Reprint Previous Manifest](#) button



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.

UPS Manifest **Mail** **Will Call**

Print Detail Report w/Manifest
 Generate New Manifest
 Reprint Previous Manifest

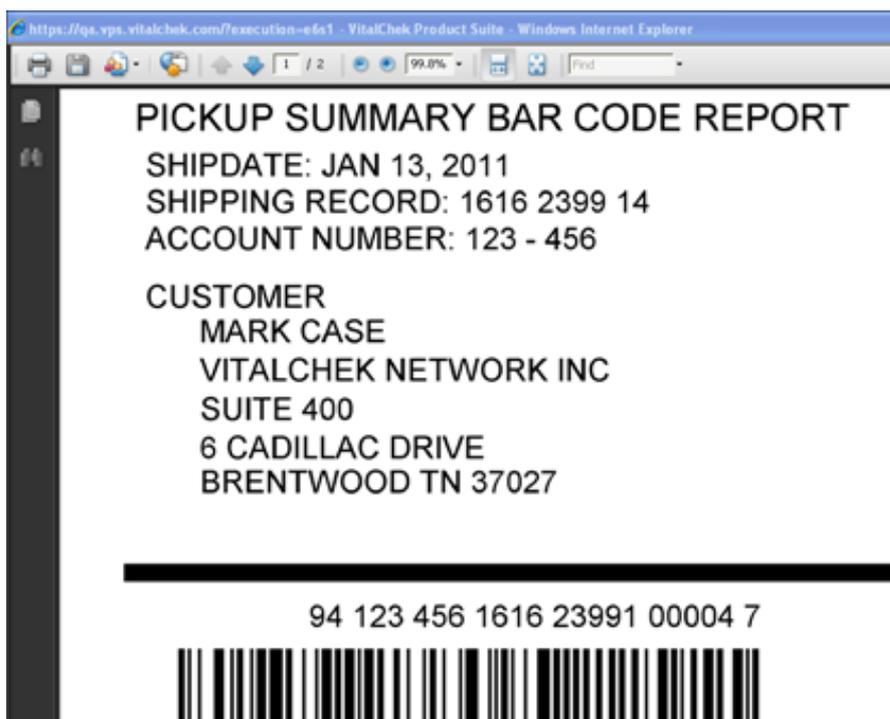
Detail Report Date

Generate

Step 6 **Manifest/Detail Reports** box is displayed



Step 7 Manifest Report displays in .pdf



How to Use the VitalChek Product Suite

Step Click printer icon to print
8



13 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.

The screenshot shows the 'Shipping Labels' interface. At the top, there are five tabs: 'Generate Labels', 'Void Labels', 'UPS Manifest', 'Mail' (which is highlighted in blue), and 'Will Call'. Below the tabs, there is an 'Order Number' input field, a 'Submit' button, and 'Order Count 0'. Below that, there is a table with columns: 'Order Number', 'Certificate Holder', 'Ship To', and 'Shipping Address'. At the bottom left, there is a 'Clear' button.

Step 1 From the [Fulfillment](#) menu, select [Shipping Labels](#). [Generate Labels](#) tab is displayed.

The screenshot shows the 'Shipping Labels' interface with the 'Generate Labels' tab selected. The 'Mail' tab is no longer highlighted. The rest of the interface, including the 'Order Number' field, 'Submit' button, and table, remains the same.

Step 2 Click [Mail](#) tab to display [Mail](#) screen

The screenshot shows the 'Shipping Labels' interface with the 'Mail' tab selected. The 'Generate Labels' tab is no longer highlighted. The rest of the interface remains the same.

Step 3 Enter [Order Number](#)

A close-up screenshot of the 'Order Number' input field. The text '13004991' is entered into the field. To the right of the field is a 'Submit' button.

Step 4 Click [Submit](#) button

A close-up screenshot of the 'Submit' button.

Step 5 Order information is displayed

The screenshot shows the 'Shipping Labels' interface with the 'Mail' tab selected. The 'Order Number' field now contains '13005248'. The 'Order Count' is now '1'. The table below has data: '13005248' in the 'Order Number' column, 'test testing' in the 'Certificate Holder' column, and 'test testing' in the 'Ship To' column. There is a checked checkbox in the first column of the table. At the bottom left, there is an 'Update Mail Date(s)' button and a 'Clear' button.

How to Use the VitalChek Product Suite

Step 6 Click [Update Mail Date\(s\)](#) button.

Step 7 Confirmation message displays



All orders entered have been marked as shipped

14 How to Search for Orders Using Advanced Criteria Order Search

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

Advanced Criteria

Order Status	<input type="text" value="All"/>
Payment Status	<input type="text" value="All"/>
Entitlement Status	<input type="text" value="All"/>
Order Source	<input type="text" value="All"/>
Operator	<input type="text" value="All"/>
Order Date(s)	<input type="text" value=""/>
Event Date	<input type="text" value=""/>
Ship Method	<input type="text" value="All"/>
Shipped	<input type="text" value="All"/>
Event Type	<input type="text" value="All"/>
Product	<input type="text" value="All"/>
	<input type="text" value="None"/>

Exclude Closed, Canceled and Declined Orders
 Show only Orders on Hold
 Include orders not ready for processing

Note - to search by Custom Fields:

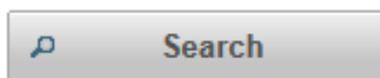
1. Select the Product
2. Select custom field from drop down
3. Enter search criteria in search field

Product	<input type="text" value="Death Authorized Copy"/>
Security Paper Nu	<input type="text" value=""/>
Security Paper Number	<input type="text" value=""/>
Certificate Number	<input type="text" value=""/>

Exclude Closed, Canceled and Declined Orders
 Show only Orders on Hold
 Include orders not ready for processing

How to Use the VitalChek Product Suite

Step 2 Click [Search](#) button



Step 3 Search results are displayed. Click on highlighted [Order Number](#) to view order in [Order Details](#) screen

Click to view order

Order Number	Date	Order Status	Payment Status	Product	Certificate Holder	Event Date	Applicant	Applicant Phone	Shipping Method	Shipped
13006142	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	

Page (1 of 1) 1 15 (Total Records 2)

Step 4 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

15 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

Order: 13005520

Order Details | Correspondence | Order Summary | Comments | Attachments

Applicant Data

First Name Address Type City
 Middle Name Zip Code State
 Last Name Address 1 Country
 Suffix Address 2 Phone
 Email Fax

DOB SSN (Last 4 or all 9) Status/Attempts Passed/1

Certificate Data

Select New Product

Line Item	Product	Qty	Last Name	First Name	Event Date	City	County
1	Birth Certificate / City of Arlington	1	Test	Test	03/12/1985	Abbott	Hill

How to Use the VitalChek Product Suite

16 How to Close Orders with a Check

How to Close Orders with a Check

Orders are closed out using the **End-of-Day** process in the **Close Orders** 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

Perform End of Day

Close Orders Reprint Report Incomplete Closes

Check Number

Process Close Show Orders in Grid

Select Orders for Close

Orders to Close Orders to Exclude

Step 2 Enter **Check Number** from the pre printed check paper

Perform End of Day

Close Orders Reprint Report Incomplete Closes

Check Number

Process Close Show Orders in Grid

Step 3 Click **Show Orders in Grid** Button to view all available order to close

Process Close Show Orders in Grid

Step 4 Available order to close are displayed in **Orders to Close** table

Perform End of Day

Close Orders Reprint Report Incomplete Closes

Check Number

Process Close Show Orders in Grid

Select Orders for Close

Orders to Close		Orders to Exclude
13004991	12/10/2012 Birth Certifica... test testing ... 23.00	
13005381	12/18/2012 Birth Certifica... tkikj dkjokdj ... 25.00	
13005384	12/18/2012 Death Certifica... jdgkjfkl jcdkl... 21.00	
13005385	12/18/2012 Birth Certifica... kfjdklsjlfk jdf... 25.00	
13005386	12/18/2012 Birth Certifica... jdfkls kfdjklj... 23.00	
13005519	01/01/2013 Birth Certifica... Test Test ... 23.00	

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

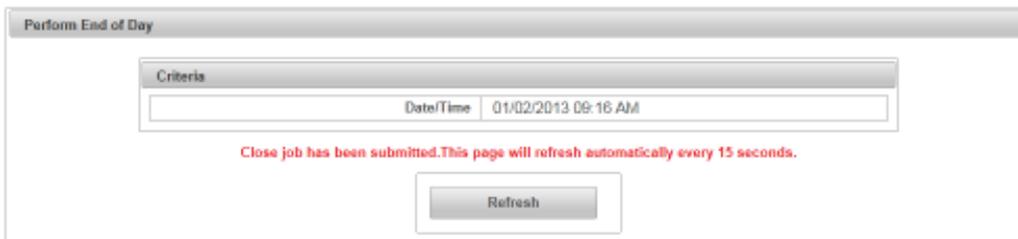
1. Click to highlight order in **Orders to Close** table
2. Click **Exclude** button  (or click **Exclude All** button  to exclude all orders from the close process). To move orders back and include in the close, click the **Include** button  (or **Include All** button  to include all orders in the close)
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

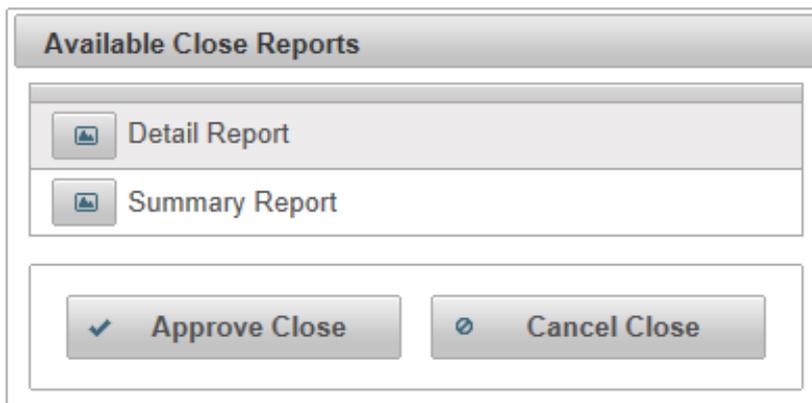
Step 5 Click Process Close button



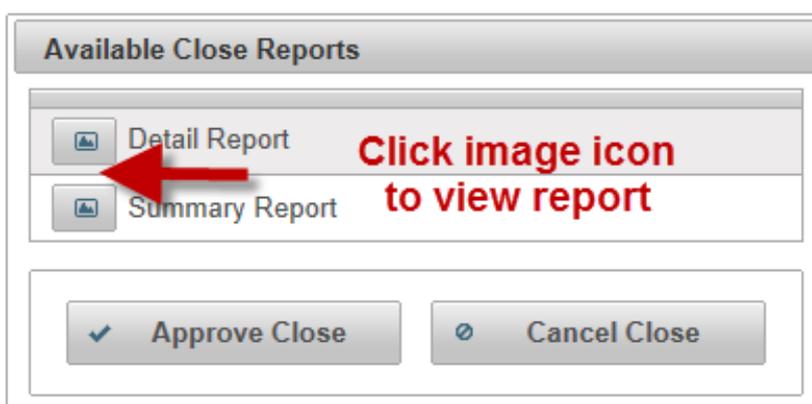
Step 6 Close job report screen appears while close is processing



Step 7 **Available Close Reports** screen appears when reports have been generated



Step 8 Click **Report** link to view report required



How to Use the VitalChek Product Suite

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

Detail Report:

Kentucky Office of Vital Statistics
Detail Report for 12/30/2010 04:25 PM CST
Check/Txn Number(s): 923211120101230042559388
Closing by: ALL
Manual Close Initiated by Allison K.

Closed Orders

User ID	Order #	Source	Auth Code	Event Information	VC Fee	Carrier Fee	Agency Fee	Other Fee	Total Fee	
artaresweb	13017804	Web	TestOK	Birth Certificate Bob Hudson	\$8.00	\$17.50	\$10.00	\$0.00	\$35.50	
Totals:					1	\$8.00	\$17.50	\$10.00	\$0.00	\$35.50

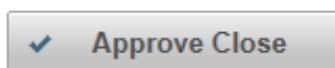
Summary Report:

Kentucky Office of Vital Statistics
Summary Report for 12/30/2010 04:25 PM CST
Check/Txn Number(s): 923211120101230042559388
Closing by: ALL
Manual Close Initiated by Allison K.

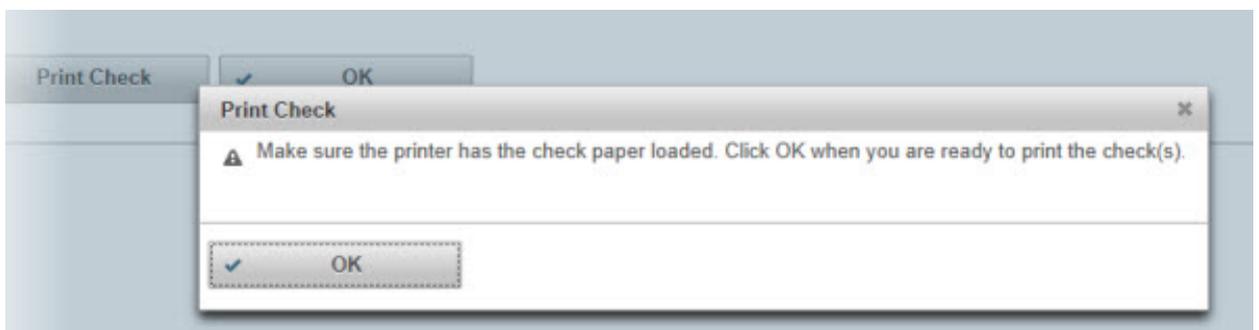
Product Type	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Birth Certificate	1	\$10.00	\$0.00	\$10.00
Totals:	1	\$10.00	\$0.00	\$10.00

Order Source	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Web	1	\$10.00	\$0.00	\$10.00
Totals:	1	\$10.00	\$0.00	\$10.00

Step 9 Click Approve Close button to continue processing the close

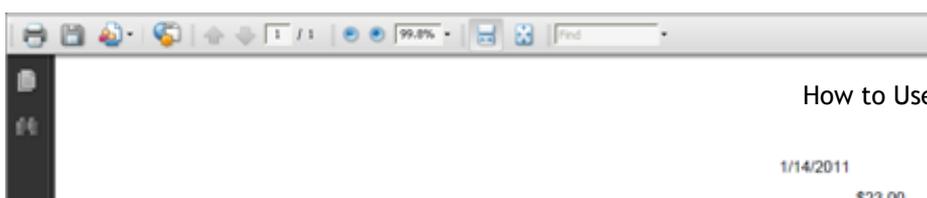


Step 10 Check paper confirmation message appears. Make sure the printer has pre-printed check paper with the number entered in the [Check Number](#) box



Step 11 Click [OK](#) button

Step 12 Check displays in a .pdf



Step Click printer icon to print check on check paper

13



17 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

Close Orders | **Reprint Report** | Incomplete Closes

Close Date: 01/02/2013 Search

Date/Time	Txn. Number	Amount	User Name
Available Reports for :			

Step 1 From the **Closeout** menu, select **Perform End-of-Day**. **Close Orders** tab is displayed

Perform End of Day

Close Orders | Reprint Report | Incomplete Closes

Process Close Show Orders in Grid

Select Orders for Close

Orders to Close	Orders to Exclude

Step 2 Select **Reprint Report** tab to display **Reprint Report** screen

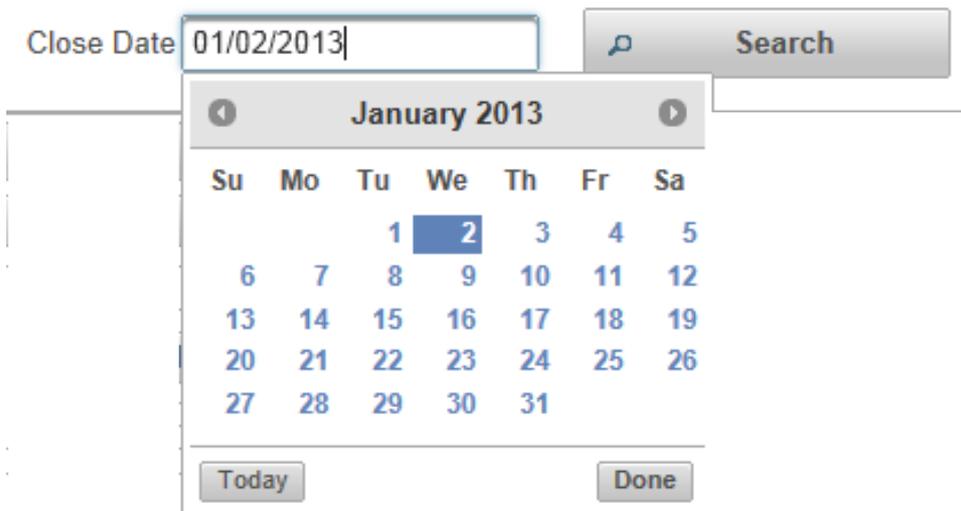
Close Orders | **Reprint Report** | Incomplete Closes

Close Date: 01/02/2013 Search

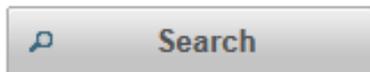
Date/Time	Txn. Number	Amount	User Name
Available Reports for :			

How to Use the VitalChek Product Suite

Step 3 **Close Date** defaults to current date, or select another date from calendar icon and click **Done**



Step 4 Click **Search** button



Step 5 Available closeouts from selected date are displayed

	Date/Time	Txn. Number	Amount	User Name
<input type="button" value="▶"/>	01/02/2013 08:09:26 AM PST	588092013010210092601	\$80.00	Allison
<input type="button" value="▶"/>	01/02/2013 09:16:40 AM PST	588112013010211164001	\$40.00	Allison

Step 6 Click on Date/Time line to select closeout

	Date/Time	Txn. Number	Amount	User Name
<input type="button" value="▶"/>	01/02/2013 08:09:26 AM PST	588092013010210092601	\$80.00	Allison
<input type="button" value="▶"/>	01/02/2013 09:16:40 AM PST	588112013010211164001	\$40.00	Allison

Step 7 Available Reports for selected date are displayed



Step 8 Click on image link to display selected report in .pdf



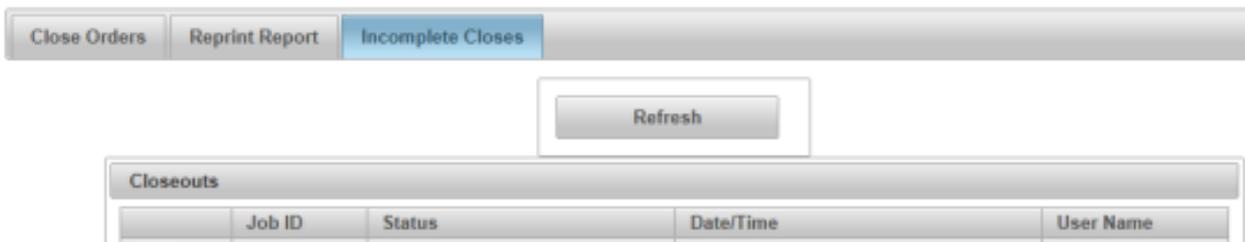
18 How to Process an Incomplete Close

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.

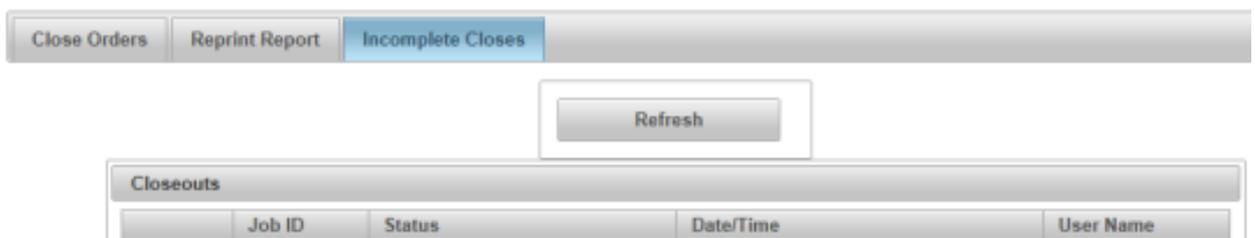
Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.



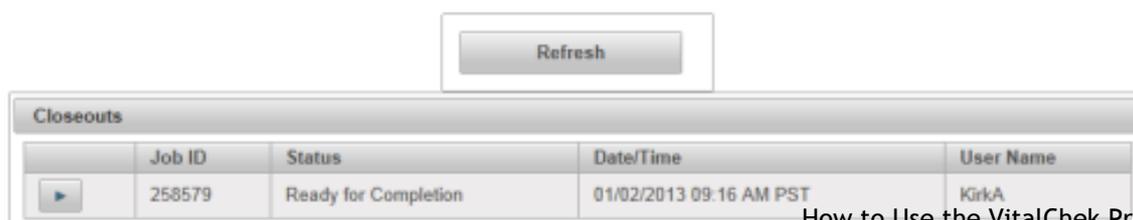
Step 1 From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed



Step 2 Click **Incomplete Closes** tab

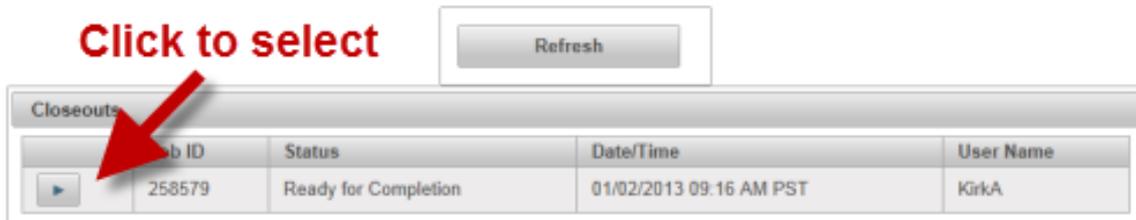


Step 3 Click **Refresh** button to display incomplete closes in the **Closeout** table

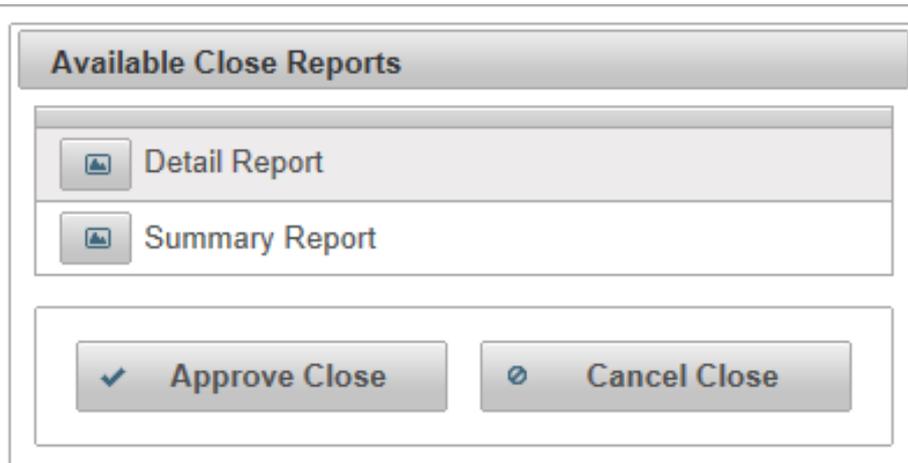


How to Use the VitalChek Product Suite

Step 4 Click the **arrow** link to select and complete the close



Step 5 The **Available Close Reports** screen is displayed with payment information



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:

Kentucky Office of Vital Statistics
Detail Report for 12/30/2010 04:25 PM CST
Check/Txn Number(s): 923211120101230042559388
Closing by: ALL
Manual Close Initiated by Allison K.

Closed Orders

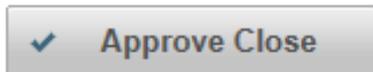
User ID	Order #	Source	Auth Code	Event Information	VC Fee	Carrier Fee	Agency Fee	Other Fee	Total Fee	
antaresweb	13017804	Web	TestOK	Birth Certificate Bob Hudson	\$8.00	\$17.50	\$10.00	\$0.00	\$35.50	
Totals:					1	\$8.00	\$17.50	\$10.00	\$0.00	\$35.50

Summary Report:

Product Type	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Birth Certificate	1	\$10.00	\$0.00	\$10.00
Totals:	1	\$10.00	\$0.00	\$10.00

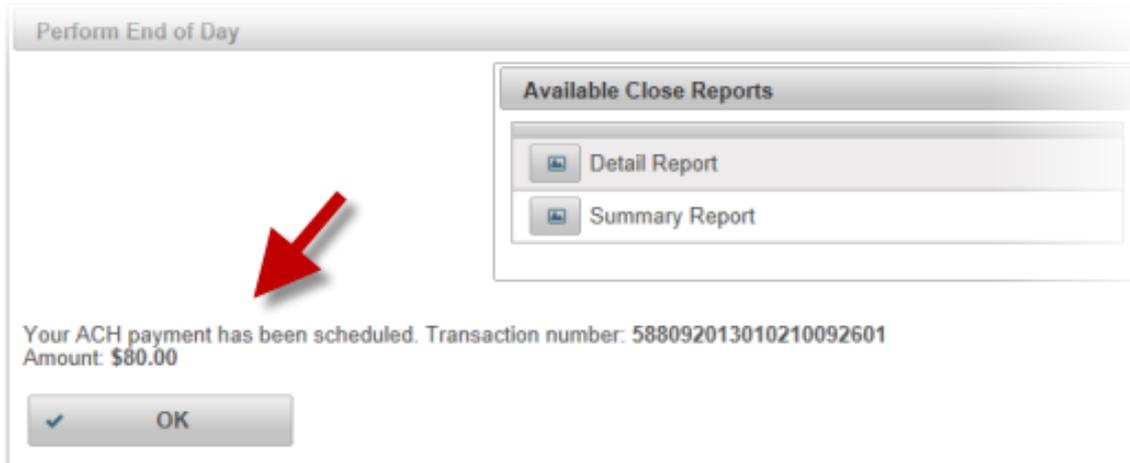
Order Source	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Web	1	\$10.00	\$0.00	\$10.00
Totals:	1	\$10.00	\$0.00	\$10.00

Step 7 Click Approve Close to complete close process



Step 8 Payment information is displayed and closeout process is complete

*Note - Agencies that close with a check, see **How to Close Orders with a Check (Section 16)** to complete closeout*



19 How to Enter Applicant Data

How to Enter Applicant Data

Data about the person placing the order is in the [Applicant Data](#) section. Required fields are shaded yellow.

The screenshot shows a window titled "Applicant Data" with a close button. The form contains the following fields:

- First Name (shaded yellow)
- Middle Name
- Last Name (shaded yellow)
- Suffix (dropdown menu)
- Email
- Address Type (dropdown menu, set to "Domestic")
- Zip Code (shaded yellow)
- Address 1 (shaded yellow)
- Address 2
- City (shaded yellow)
- State (dropdown menu)
- Country (dropdown menu)
- Phone (shaded yellow)
- Fax

Agencies that use Authentication to verify identify will display the [Authenticate](#) section in the [Applicant Data](#)

The screenshot shows the "Authenticate" section with the following fields and buttons:

- DOB (MMDDYYYY) (shaded yellow)
- SSN (shaded yellow) (Last 4 or all 9)
- Authenticate button
- Status/Attempts

Step 1 Enter [First Name](#) of the person placing the order

First Name

Step 2 Enter [Middle Name](#) of the person placing the order

Middle Name

Step 3 Enter [Last Name](#) of the person placing the order

Last Name

Step 4

Choose suffix (Mr., Mrs. Ms..) from the drop down list

Suffix 

Step 5

Enter **Email** address of the person placing the order

Email

Step 6

Select **Domestic, International, Military** for person placing the order

Address Type 

Step 7

Enter **Zip Code** of person placing the order. This will populate the **City** and

How to Use the VitalChek Product Suite

State fields

Zip Code

Step 8

Enter street **Address** of person placing the order

Address 1

Step 9

Enter additional **Address** information line of person placing the order (if needed)

Address 2

Step 10

Enter **City** of residence of person placing the order (if not correctly pre-populated from the zip code)

City

Step 11

Select **State** of residence of person placing the order (if not correctly pre-populated from the zip code) from the drop down list

State

Step 12

Enter **Country** of residence of person placing the order

Country

Step 13

Enter 10 digit **Phone** number (plus extension, if required) of person placing the order

Phone

How to Use the VitalChek Product Suite

Step 14

Enter 10 digit **Fax** number of person placing the order

Fax

Authentication

DOB

Enter **Date of Birth** of person placing the order (2 digit month, 2 digit day and 4 digit year)

DOB
(MMDDYYYY)

SSN

Enter **Social Security Number** of person placing the order. Can enter last 4 numbers of SSN or all 9

SSN (Last 4 or all 9)

Authentication

Click **Authenticate** button to submit and process Authentication information

Authenticate

Status/Attempts

Status displays the results of the Authentication process (Passed or Failed) and **Attempts** displays the number of times the applicant clicked the **Authenticate** button to submit the information.

Status/Attempts

Note - Applicants have 3 attempts to pass the Authentication section. After 3 failed attempts, applicant must submit required documentation to verify identity and continue processing order.

20 How to Enter Birth Certificate Data

How to Enter Birth Certificate Data

Information about the certificate(s) is entered into the **Certificate Data** section. Required fields are shaded in yellow.

The screenshot shows a window titled "Certificate Data" with a "Select New Product" dropdown menu and an "Add" button. Below is a table with the following data:

Line #	Product	Qty	Last Name	First Name	Event Date	City	County			
1	Birth Certificate / Statewide	1	testing	test	01/01/1950	Abbott	Hill			

Step 1 Select a **Birth Certificate** option from the **Select New Product** drop down list that displays available certificates for the selected Agency.

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

The screenshot shows the "Certificate Data" window with the "Select New Product" dropdown menu open. The menu lists three options: "Birth Certificate / City of Arlington", "Birth Certificate / Statewide", and "Death Certificate / City Of Arlington". A mouse cursor is pointing at the dropdown arrow.

Step 2 Click **Add** button

The screenshot shows a single button labeled "Add".

Step 3 **Birth Certificate** page displays

The screenshot shows the "Birth Certificate / City of Arlington" form. It is divided into two main sections: "Product Information" and "Certificate Details".

Product Information:

- Event Date (mm/dd/yyyy): [Yellow field]
- City: [Dropdown]
- Relationship: [Dropdown]
- Country Of Use: [Dropdown]
- County: Tarrant [Dropdown]
- Reason: [Dropdown]
- Product Quantity: Birth Certificate / City of Arlington \$ 23.00 [1] [Dropdown]
- Misc Fee: [Field]

Certificate Details:

- Certificate Holder Data:**
 - First Name: [Yellow field]
 - Middle Name: [Field]
 - Last Name: [Yellow field]
 - Suffix: [Dropdown]
 - Still Living: [No] [Dropdown]
 - Gender: [Dropdown]
- Father Data:**
 - First Name: [Yellow field]
 - Middle Name: [Field]
 - Last Name: [Yellow field]
 - Suffix: [Dropdown]
- Mother Data:**
 - First Name: [Yellow field]
 - Middle Name: [Field]
 - Maiden Name: [Yellow field]
 - Suffix: [Dropdown]

Buttons: OK, Cancel

How to Use the VitalChek Product Suite

Step 4 Enter **Event Date** in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.

Event Date (mm/dd/yyyy)

Step 5 Select **City** from the drop down list. This is the city where the event occurred.

City

*Note: If the city where the event occurred is not in the list, select **Not in List** option. **Other City** field is displayed. Type the **Other City** name.*

City
Other City

*If the applicant does not know the city where the event occurred, select **Not in List** and enter **County** (step 6).*

Step 6 Select **County** from the drop down list. This is the county where the event occurred.

Country

Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")

Relationship

Step 8 **Country of Use** is only required when the Applicant is requesting an Apostille. Select the county that the Apostille is being used for from the drop down list.

Country Of Use

Step 9 Enter the **Product Quantity**, (number of certificates)

Product Quantity
Birth Certificate / \$ 23.00

Step 10 Enter **Certificate Holder Data**, starting with the **First Name** of the person that is listed on the certificate

Certificate Holder Data
First Name

Step 11 Enter the **Middle Name** (if required) of the person that is listed on the certificate

Middle Name

Step 12 Enter the **Last Name** of the person that is listed on the certificate\

Last Name

Step 13 Select a suffix from the drop down list

Suffix

Step 14 Select Yes or No from the **Still Living** drop down list

Still Living

Step 15 Select Male or Female from the **Gender** drop down list

Gender

Step 16 Enter **Father Data**, starting with the certificate holders father's **First Name**

—Father Data—

First Name

Step 17 Enter the (certificate holders) father's **Middle Name** (if required)

Middle Name

Step 18 Enter the (certificate holders) father's **Lasts Name**

Last Name

Step 19 Select a **Suffix** for the (certificate holders) father (if required)

Suffix

Step 20 Enter **Mother Data**, starting with the certificate holders mother's **First Name**

—Mother Data—

First Name

Step 21 Enter the (certificates holders) mother's **Middle Name** (if required)

Middle Name

Step 22 Enter the (certificate holders) mother's **Maiden Name**

Maiden Name

Step 22 Select a **Suffix** for the (certificate holders) mother (if required)

Suffix

Step 23 Click **OK** to continue order to **Cancel** to cancel product information

21 How to Enter Death Certificate Data

How to Enter Death Certificate Data

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

Line Item	Product	Qty	Last Name	First Name	Event Date	City	County		
1	Death Certificate / City Of Arlington	1	testing	test	01/01/1977	Arlington	Tarrant		

Step 1 Select a [Death Certificate](#) option from the [Select New Product](#) drop down list that displays available certificates for the selected Agency.

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

Step 2 Click [Add](#) button

Step 3 [Death Certificate](#) page displays

How to Use the VitalChek Product Suite

Step 4 Enter **Event Date** in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.

Event Date (mm/dd/yyyy)

Step 5 Select **City** from the drop down list. This is the city where the event occurred.

City

*Note: If the city where the event occurred is not in the list, select **Not in List** option. **Other City** field is displayed. Type the **Other City** name.*

City **Not In List**
Other City

*If the applicant does not know the city where the event occurred, select **Not in List** and enter **County** (step 6).*

Step 6 Select **County** from the drop down list. This is the county where the event occurred.

Country

Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")

Relationship

Step 8 **Country of Use** is only required when the Applicant is requesting an Apostille. Select the county that the Apostille is being used for from the drop down list.



Step 9 Enter the **Product Quantity**, (number of certificates)

Product Quantity
Death Certificate / \$ 21.00 /4.00

Step 10 Enter **Certificate Holder Data**, starting with the **First Name** of the person that is listed on the certificate

Certificate Holder Data
First Name

Step 11 Enter the **Middle Name** (if required) of the person that is listed on the certificate

Middle Name

Step Enter the **Last Name** of the person that is listed on the certificate

12

Last Name

Step 13 Select a suffix from the drop down list

Suffix

Step 14 Select Male or Female from the **Gender** drop down list

Gender

Step 15 Enter **Spouse Data**, (if applicable)

–Spouse Data _____

First Name

Step 16 Enter the Spouse's **Middle Name** (if applicable/required)

Middle Name

Step 17 Enter the Spouse's **Lasts Name** (if applicable)

Last Name

Step 18 Select a **Suffix** for the Spouse

Suffix

Step 19 Click **OK** to continue order to **Cancel** to cancel product information

How to Use the VitalChek Product Suite

22 How to Enter Marriage Certificate Data

How to Enter Marriage Certificate Data

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

The screenshot shows a form titled "Certificate Data". At the top, there is a "Select New Product" dropdown menu and an "Add" button. Below this is a table with columns: Line Item, Product, Qty, Last Name, First Name, Event Date, City, County, and an empty column. The table is currently empty.

Step 1 Select the [Marriage Certificate](#) option from the [Select New Product](#) drop down list that displays available certificates for the selected Agency.

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

The screenshot shows the "Certificate Data" form with the "Select New Product" dropdown menu open. The dropdown menu lists three options: "Birth Certificate / City of Arlington", "Birth Certificate / Statewide", and "Death Certificate / City Of Arlington". A mouse cursor is pointing at the dropdown arrow.

Step 2 Click [Add](#) button

The screenshot shows a single "Add" button.

Step 3 [Marriage Certificate](#) page displays

The screenshot shows the "Marriage" form. It is divided into two main sections: "Product Information" and "Certificate Details".

Product Information:

- Event Date (mm/dd/yyyy):
- City:
- Relationship:
- Country Of Use:
- County:
- Reason:
- Product Quantity: Marriage \$ 20.00 /3.00
- Misc Fee:

Certificate Details:

Groom Data:

- First Name:
- Middle Name:
- Last Name:
- Suffix:

Bride Data:

- First Name:
- Middle Name:
- Maiden Name:
- Suffix:

Step 4 Enter **Event Date** in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.

Event Date (mm/dd/yyyy)

Step 5 Select **City** from the drop down list. This is the city where the event occurred.

City

*Note: If the city where the event occurred is not in the list, select **Not in List** option. **Other City** field is displayed. Type the **Other City** name.*

City

Other City

*If the applicant does not know the city where the event occurred, select **Not in List** and enter **County** (step 6).*

Step 6 Select **County** from the drop down list. This is the county where the event occurred.

Country

Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")

Relationship

Step 8 **Country of Use** is only required when the Applicant is requesting an Apostille. Select the county that the Apostille is being used for from the drop down list.

Country Of Use

Step 9 Enter the **Product Quantity**, (number of certificates)

Product Quantity

Step 10 Enter **Groom Data**, starting with the **First Name** of the Groom that is listed on the certificate

Groom Data

First Name

Step 11 Enter the **Middle Name** (if required) of the Groom that is listed on the certificate

Middle Name

How to Use the VitalChek Product Suite

Step 12 Enter the **Last Name** of the Groom that is listed on the certificate

Last Name

Step 13 Select a suffix from the drop down list

Suffix

Step 16 Enter **Bride Data**, starting with the Bride's **First Name**

Bride Data
First Name

Step 17 Enter the Bride's **Middle Name** (if required)

Middle Name

Step 18 Enter the Bride's **Maiden Name**

Maiden Name

Step 19 Select a **Suffix** for the Bride (if required)

Suffix

Step 20 Click **OK** to continue order to **Cancel** to cancel product information

OK

23 How to Enter Divorce Certificate Data

How to Enter Divorce Certificate Data

Information about the certificate(s) is entered into the **Certificate Data** section. Required fields are shaded in yellow.

Certificate Data

Select New Product Add

Line Item	Product	Qty	Last Name	First Name	Event Date	City	County
-----------	---------	-----	-----------	------------	------------	------	--------

Step 1 Select the **Divorce Certificate** option from the **Select New Product** drop down list that displays available certificates for the selected Agency.

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

Certificate Data

Select New Product

Line Item	Product
-----------	---------

Shipping

- Birth Certificate
- Stillbirth Certificate
- Death Certificate
- Divorce Certificate
- Marriage Certificate

Step 2 Click **Add** button

Add

Step 3 **Divorce Certificate** page displays

Divorce Certificate

Product Information

Event Date (mm/dd/yyyy) City Relationship Country Of Use

County Reason

Product Quantity Divorce Certificate \$ 6.00 /6.00

Certificate Details

Groom Data

First Name Middle Name Last Name Suffix

Bride Data

First Name Middle Name Maiden Name Suffix

OK Cancel

How to Use the VitalChek Product Suite

Step 4 Enter **Event Date** in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.

Event Date (mm/dd/yyyy)

Step 5 Select **City** from the drop down list. This is the city where the event occurred.

City

*Note: If the city where the event occurred is not in the list, select **Not in List** option. **Other City** field is displayed. Type the **Other City** name.*

City **Not In List**
Other City

*If the applicant does not know the city where the event occurred, select **Not in List** and enter **County** (step 6).*

Step 6 Select **County** from the drop down list. This is the county where the event occurred.

Country

Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")

Relationship

Step 8 **Country of Use** is only required when the Applicant is requesting an Apostille. Select the county that the Apostille is being used for from the drop down list.

Country Of Use

Step 9 Enter the **Product Quantity**, (number of certificates)

Product Quantity
Divorce Certificate \$ 6.00 /6.00

Step 10 Enter **Groom Data**, starting with the **First Name** of the Groom that is listed on the certificate

Certificate Holder Data
First Name

Step 11 Enter the **Middle Name** (if required) of the Groom that is listed on the certificate

Middle Name

Step 12 Enter the **Last Name** of the Groom that is listed on the certificate

Last Name

Step 13 Select a suffix from the drop down list

Suffix

Step 16 Enter **Bride Data**, starting with the Bride's **First Name**

Bride Data
First Name

Step 17 Enter the Bride's **Middle Name** (if required)

Middle Name

Step 18 Enter the Bride's **Maiden Name**

Maiden Name

Step 19 Select a **Suffix** for the Bride (if required)

Suffix

Step 20 Click **OK** to continue order to **Cancel** to cancel product information

24 How to Enter Official Records Data

How to Enter Official Record Data

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

Certificate Data

Select New Product Add

Line Item	Product	Qty	Last Name	First Name	Event Date	City	County
-----------	---------	-----	-----------	------------	------------	------	--------

Step 1 Select [Official Record](#) option from the [Select New Product](#) drop down list that displays available certificates for the selected Agency.

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

Order Details

Select New Product Add

Step 2 Click [Add](#) button

Add

Step 3 [Official Record](#) page displays

Official Records

Product Information

Amount	<input type="text"/>
Document Number	<input type="text"/>
Document Type	<input type="text"/>
Certified Copy	<input type="text"/>

OK Cancel

- Step 4** Enter **Amount** of the Payment
- Step 5** Enter the **Document Number**
- Step 6** Enter the **Document Type**
- Step 7** Confirm if certified copies are required, Yes or No
- Step 8** Click the **OK** button to continue order or **Cancel** to cancel product

25 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 Same As Applicant Signature Required

First Name Address Type City

Middle Name Zip Code State

Last Name Address 1 Country

Suffix Address 2 Phone

Step 1 Select [Shipping Method](#) from drop down list of available types of delivery methods

Select Shipping Method

Step 2 If the person who the order is shipped to is the same as the person who placed the order (Applicant), check [Same As Applicant](#) box. Information will populate and [Shipping](#) section will collapse

Same As Applicant

Note [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

Signature Required

Step 3 Enter [First Name](#) of the person the order ships to

First Name

Step 4 Enter [Middle Name](#) of the person the order ships to

Middle Name

Step 5 Enter [Last Name](#) of the person the order ships to

Last Name

Step 6 Select [Suffix](#) of the person the order ships to from drop down list

Suffix

Step 7 Select address type from drop down (**Domestic, International, Military**)

Address Type

Step 8 Enter **Zip Code** of shipping address. The Zip Code entered will automatically populate the **City** and **State** fields

Zip Code

Step 9 Enter shipping street **Address**

Address 1

Step 10 If necessary, enter additional shipping **Address** information

Address 2

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

City

Step 12 Enter shipping **State** if not correct from **Zip Code** entry (step 8)

State

Step 13 **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 14 Enter 10 digit **Phone** number of person the order is shipped to

Phone

26 How to Enter Payment with a Personal Check (electronic)

How to Enter Payment with a Personal Check (electronic)

Payment can be made using a personal check in the [Payment](#) section

The screenshot shows the 'Payment' form with the following fields and options:

- Payment type options: Same As Applicant, Same As Shipping, Multiple/Partial Payments
- 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 \$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 888-412-1838.
 Click here to indicate that the caller has been informed of the above disclaimer
- Check details: Routing No., Account No., Check Number, Routing No. Conf, Account No. Conf, Check No. Conf
- Customer info: Drivers License No., Issuing State, Date of Birth, SSN
- Address and contact info: First Name, Middle Name, Last Name, Suffix, Address Type (Domestic), Zip Code, City, State, Address 1, Address 2, Country (United States of America), Phone
- Buttons: 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.

The screenshot shows the 'Payment' form with the 'Select New Payment' dropdown menu open, displaying the following options:

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

The 'Add' button is visible to the right of the dropdown menu.

Step 2 Click [Add](#) button

A close-up of the 'Add' button, which is a grey rectangular button with the word 'Add' in black text.

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

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

Same As Applicant

Step 5 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.*

Same As Shipping

Multiple/Partial Payments - Check box indicating the total amount due will be paid in multiple or partial payments

Multiple/Partial Payments

When the **Multiple/Partial Payments** box is checked, the **Payment Amount** field displays, enter the amount of the payment

Multiple/Partial Payments **Payment Amount**

Step 6 Check **Disclaimer Confirmation** box indicating the caller has been informed of the

How to Use the VitalChek Product Suite

Disclaimer

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 \$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 888-412-1838.

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

Step 7 Enter **Routing No.** (number) of the checking account used for payment

Routing No.

Step 8 Reenter **Routing No. (Conf.)** for confirmation of the checking account routing number used for payment

Routing No. Conf

Step 9 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 10 Enter **Account No.** of the checking account used for payment

Account No.

Step 11 Reenter **Account No. (Confirmation)** of the checking account used for payment

Account No. Conf

Step 12 Select the state where the Drivers License was issued from using the **Issuing State** drop down selection

Issuing State

Step 13 Enter **Check Number** of the check used for payment

Check Number

Step 14 Reenter **Check No. (Conf)** of the check used for payment

Check No. Conf

How to Use the VitalChek Product Suite

Step 15 Enter **Date of Birth** of person making the payment (checking account holder)

Date of Birth

Step 16 Complete all name and address fields.

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

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

First Name

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

Middle Name

Step 19 Enter **Last Name** of person making payment on the order (checking account holder)

Last Name

Step 20 Select **Suffix** of the person making payment on the order (checking account holder)

Suffix

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

Address Type

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

How to Use the VitalChek Product Suite

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

Step 30 Check payment confirmation is displayed

Payment

Select New Payment

#	Type	Amount	Card/Acct	Last Name	First Name	Status			
1	PC	0.00	6666	testing	test		<input type="button" value="Delete"/>	<input type="button" value="Edit"/>	

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

Copy Auth

Step 32 Order is authorized and the following is displayed:

 **Your order has been authorized.**

Order: 13001474

Authorized message appears:

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

The screenshot shows a 'Status' section with a dropdown menu for 'Entitlement' set to 'QC Approved'. Below it, the 'Order' status is 'Open' and the 'Payment' status is 'Paid in Full'.

Payment information in Status section displays **Authorized**

The screenshot shows a 'Payment' section with a 'Select New Payment' dropdown and an 'Add' button. Below is a table with one row of payment information.

#	Type	Amount	Card/Acct	Last Name	First Name	Status			
1	PC	46.50	6666	testing	test	Authorized		Q	

27 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

The screenshot shows a 'Payment' dialog box with the following fields and options:

- Options: Same As Applicant, Same As Shipping, Multiple/Partial Payments
- Card No. [Text Field] Expiration Date(MM/YYYY) [Text Field]
- First Name [Text Field] Address Type [Domestic] City [Text Field]
- Middle Name [Text Field] Zip Code [Text Field] State [Dropdown]
- Last Name [Text Field] Address 1 [Text Field] Country [United States of Amer]
- Suffix [Dropdown] Address 2 [Text Field] Phone [Text Field]
- Buttons: OK, Cancel

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.

The screenshot shows the 'Payment' dialog box with the 'Select New Payment' dropdown menu set to 'Credit Card'. An 'Add' button is visible next to the dropdown. Below the dropdown is a table with the following columns:

#	Type	Amount	Card/Acct	Last Name	First Name	Status	County
---	------	--------	-----------	-----------	------------	--------	--------

Step 2 Click **Add** button

A close-up of the 'Add' button, which is a grey rectangular button with the text 'Add' in the center.

Step 3 **Payment** screen is displayed for credit card payments

The screenshot shows the 'Payment' dialog box with the following fields and options:

- Options: Same As Applicant, Same As Shipping, Multiple/Partial Payments
- Card No. [Text Field] Expiration Date(MM/YYYY) [Text Field]
- First Name [Text Field] Address Type [Domestic] City [Text Field]
- Middle Name [Text Field] Zip Code [Text Field] State [Dropdown]
- Last Name [Text Field] Address 1 [Text Field] Country [United States of Amer]
- Suffix [Dropdown] Address 2 [Text Field] Phone [Text Field]
- Buttons: OK, Cancel

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

Same As Applicant

Step 5 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.*

Same As Shipping

Multiple/Partial Payments - Check box indicating the total amount due will be paid in multiple or partial payments

Multiple/Partial Payments

When the **Multiple/Partial Payments** box is checked, the **Payment Amount** field displays, enter the amount of the payment

Multiple/Partial Payments Payment Amount

Step 6 Enter Credit **Card No.** (number)

Card No.

Step 7 Enter credit card **Expiration Date** (MM/YYYY)

Expiration Date(MM/YYYY)

Step 8 Complete all name and address fields.

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

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

First Name

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

Middle Name

Step 11 Enter **Last Name** of person making payment on the order (credit card holder)

Last Name

How to Use the VitalChek Product Suite

Step 12 Select **Suffix** of the person making payment on the order (credit card holder)

Suffix

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

Address Type

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 **OK** button

Step 22 Credit card payment information is displayed

Payment

Select New Payment

#	Type	Amount	Card/Acct	Last Name	First Name	Status			
1	CC	0.00	MC 0248	testing	test		<input type="button" value="v"/>	<input type="button" value="v"/>	<input type="button" value="v"/>

Step 24 **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 25 Order is authorized and the following is displayed:

i Your order has been authorized.

Order: 13001474

Order Details Correspondence Order

Applicant Data

Authorized message appears:

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

Status

Entitlement QC Approved ▾

Order Open

Payment Paid in Full

Payment information in Status section displays **Authorized**

Payment									
#	Type	Amount	Card/Acct	Last Name	First Name	Status	County		
1	CC	53.95	MC 0248	testing	test	Authorized	Hill		

28 How to Void a Payment

How to Void a Payment

Orders that have been "Paid in Full" can be voided.

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

Line #	Product	Qty	Last Name	First Name	Event Date	City	County
1	Birth Certificate / City of Arlington	1	testing	test	01/01/1950	Abbot	Hill

- Step 2** Click the **Void** button

Update/Save
Print Receipt
Void
Copy
Copy Auth

*Note - Based on agency requirements, a **Void Comment** dialog box may appear; enter the reason for the void and press **OK***

Void Comment
⚠ Enter comment and click OK to void this order payment

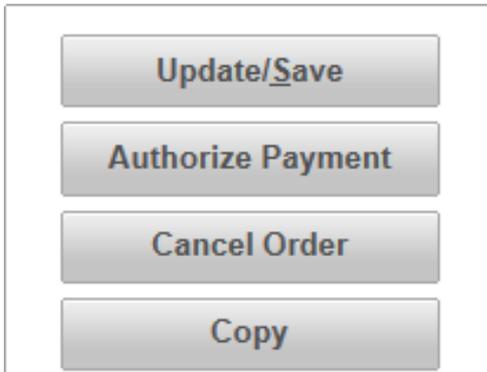
Step 3 Order is voided and **Payment Status** changes to **Refunded**

Status	
Entitlement	Ent Approved ▼
Order	Open
Payment	Refunded

29 How to Copy Orders

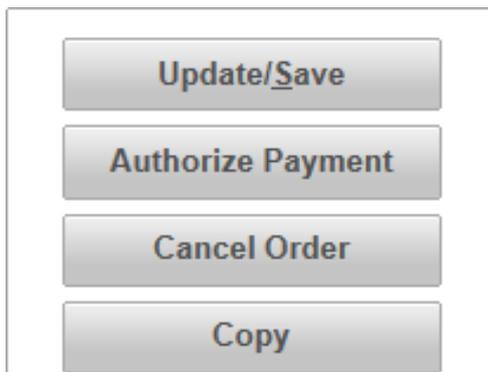
How to Copy Orders

Users can use the [Copy](#) process to duplicated orders

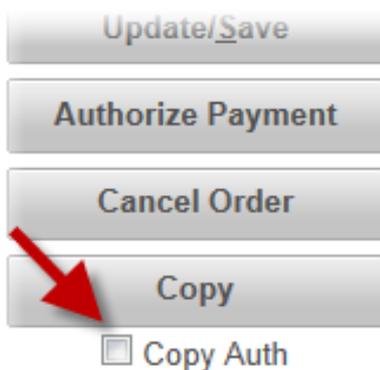


Step 1 Locate order to copy using any search criteria

Step 2 Once order is displayed in the [Order Details](#) tab, click [Copy](#) button



Note - Agencies that use Authentication will see the Copy Auth check box. Check box to copy the Authentication to the new order



Step 3 Newly created order is displayed in [Order Details](#) with new order number

30 How to Send New Correspondence

How to Send New Correspondence

New Correspondence tab contains information on all written communication (e-mail/letter) available to send to the customer.

Order: 13005027

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

New Correspondence | Previous Correspondence

Delivery Type: Email (dropdown)
Email: akirk@vitalchek.com

Reasons:

- Need Clarification
- Payment Declined
- Entitlement
- Expired ID
- Illegible ID
- Order Voided
- Proof of Linkage

Preview | Cancel | Make this correspondence Public

Step 1 From the **Order Details** for the order, click **Correspondence** tab. **New Correspondence** tab is displayed.

Order: 13000587

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

New Correspondence | Previous Correspondence

Delivery Type: Email (dropdown)
Email: casandra.thomas@lexisnexis.com

Reasons:

- Need Clarification
- Payment Declined
- Entitlement
- Expired ID
- Illegible ID
- Order Voided

Generate | Preview | Cancel | Make this correspondence Public

Step 2 Select **Delivery Type** from the available drop down list; **Delivery Type** defaults to email if an email has been provided

New Correspondence | Previous Correspondence

Delivery Type: Email (dropdown)
Email: akirk@vitalchek.com

Step 3 Applicant's **Email** is autopopulated from order detail, revise if needed

Email

Step 4 Check box for the type of correspondence to send in the **Reasons** section

Reasons

- Need Clarification
- Payment Declined
- Entitlement
- Expired ID
- Illegible ID
- Order Voided

Step 5 If **US Mail** is selected -

New Correspondence **Previous Correspondence**

Delivery Type **←**

Email

Reasons

- Need Clarification
- Payment Declined
- Entitlement
- Expired ID
- Illegible ID
- Order Voided
- Proof of Linkage

Click Preview button to view and print correspondence **↙**

If **Email** is selected -

Click **Generate** to send an email

Order Details **Correspondence** **Order Summary** **Comments** **Attachments**

New Correspondence **Previous Correspondence**

Delivery Type

Email

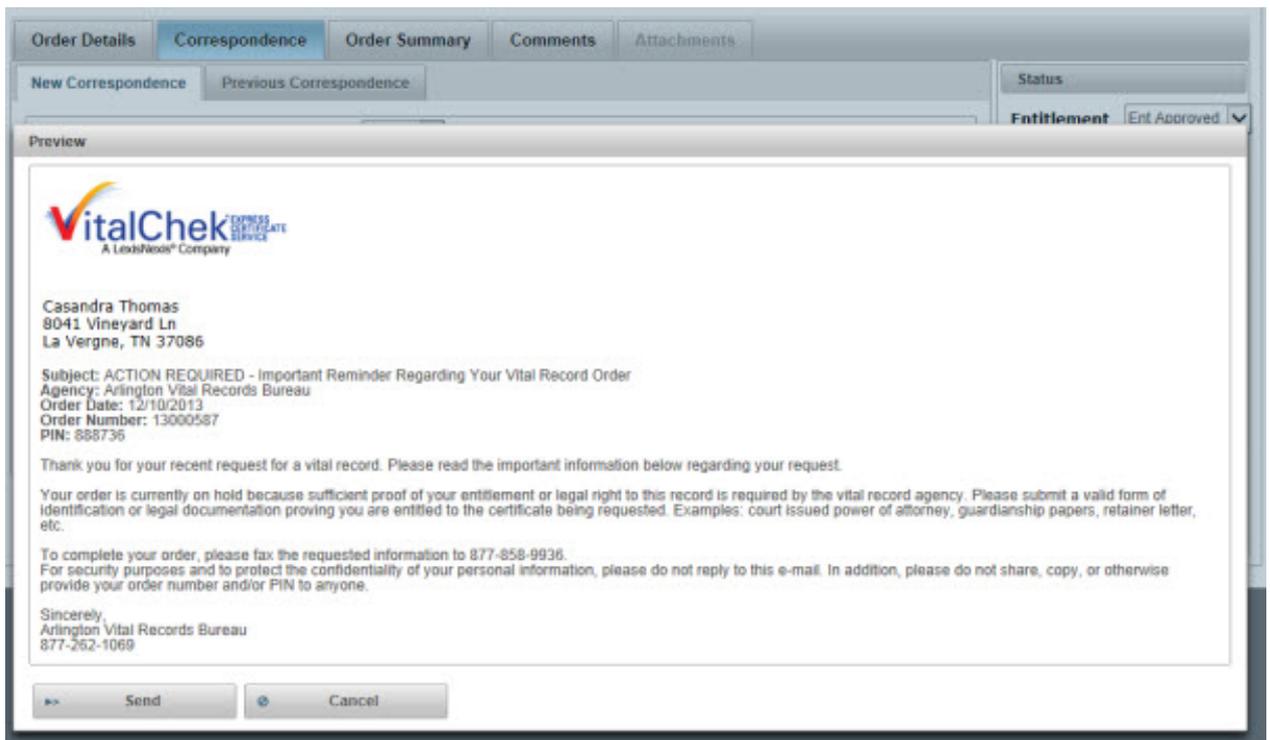
Reasons

- Need Clarification
- Payment Declined
- Entitlement
- Expired ID
- Illegible ID
- Order Voided

↘

How to Use the VitalChek Product Suite

or [Preview](#) to view the correspondence and then click [Send](#)



Note - when checked, the [Make this correspondence Public](#) check box will allow VitalChek employees to see the correspondence sent



Step 6 Correspondence sent message appears

6



31 How to View and Resend Previous Correspondence

How to View and Resend Previous Correspondence

Correspondence that has been sent to the customer is listed in the [Previous Correspondence](#) section.

	Date	Letter Type	User	Delivery	Visibility	Email Address
	12/10/12 2:10:04 PM	Order Created	VPS System (VC)	Email	Public	akirk@vitalchek.com
	12/10/12 2:12:25 PM	Web Upload Success	VPS System (VC)	Email	Public	akirk@vitalchek.com
	1/5/13 4:37:08 PM	User Generated	Allison K.	Email	Agency only	akirk@vitalchek.com

VitalChek EXPRESS CERTIFICATE SERVICE
A LexisNexis® Company

Home | About Us | FAQs | Check the Status of Your Order | Help

Thank you for placing your order with VitalChek Inc. As a courtesy below is your order confirmation.

Purchase Date: Monday, December 10 2012 02:09 PM CST
Order Number: 13005027
Order Pin: 459100

For your security and to protect the confidentiality of your personal information, please do not share, copy, or otherwise provide your Order Number and/or PIN Number to anyone else.

What's Next?
Tri County Health Dept requires that you provide documentation to verify your identity. If you have not done so already, please use the link below to provide us with the required documents. Once your documents have been submitted, it will take 24-48 hrs for approval. You will be contacted by e-mail once your documents have been reviewed.
[Click here to Login and Scan/Upload or Fax your documentation](#)

Step 1 From the [Order Details](#) for the order, click [Correspondence](#) tab. [New Correspondence](#) screen is displayed.

Order: 13005027

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

New Correspondence | Previous Correspondence

Delivery Type: Email
Email: akirk@vitalchek.com

Reasons

- Need Clarification
- Payment Declined
- Entitlement
- Expired ID
- Illegible ID
- Order Voided
- Proof of Linkage

Preview | Cancel | Make this correspondence Public

Step 2 Click [Previous](#) tab. [Previous Correspondence](#) is displayed

	Date	Letter Type	User	Delivery	Visibility	Email Address
	12/10/12 2:10:04 PM	Order Created	VPS System (VC)	Email	Public	akirk@vitalchek.com
	12/10/12 2:12:25 PM	Web Upload Success	VPS System (VC)	Email	Public	akirk@vitalchek.com
	1/5/13 4:37:08 PM	User Generated	Allison K.	Email	Agency only	akirk@vitalchek.com

VitalChek EXPRESS CERTIFICATE SERVICE
A LexisNexis® Company

Home | About Us | FAQs | Check the Status of Your Order | Help

Thank you for placing your order with VitalChek Inc. As a courtesy below is your order confirmation.

Purchase Date: Monday, December 10 2012 02:09 PM CST
Order Number: 13005027
Order Pin: 459100

For your security and to protect the confidentiality of your personal information, please do not share, copy, or otherwise provide your Order Number and/or PIN Number to anyone else.

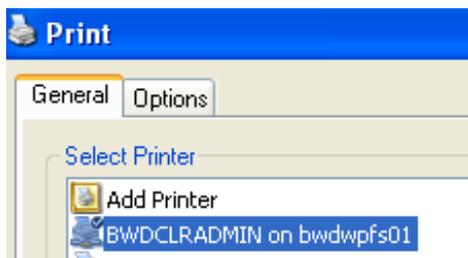
What's Next?
[Click here to Login and Scan/Upload or Fax your documentation](#)

How to Use the VitalChek Product Suite

Step 3 Click **Reprint** button to reprint previously sent correspondence or **Resend** to resend via email



Step 4 **Reprint** button opens up the printer dialog box to print correspondence.



Resend button automatically emails to the email address in VPS.

Step 5 Correspondence successfully resent message appears



32 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

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

Full Comment Text

add comments here

New Comment

Make this comment public

Step 1 Enter comment text in the **New Comment** box

New Comment

Make this comment public

Step 2 Check the **Make this comment public** to allow VitalChek staff to view comment, or leave unchecked to keep comment viewable by agency staff only

New Comment

Make this comment public

How to Use the VitalChek Product Suite

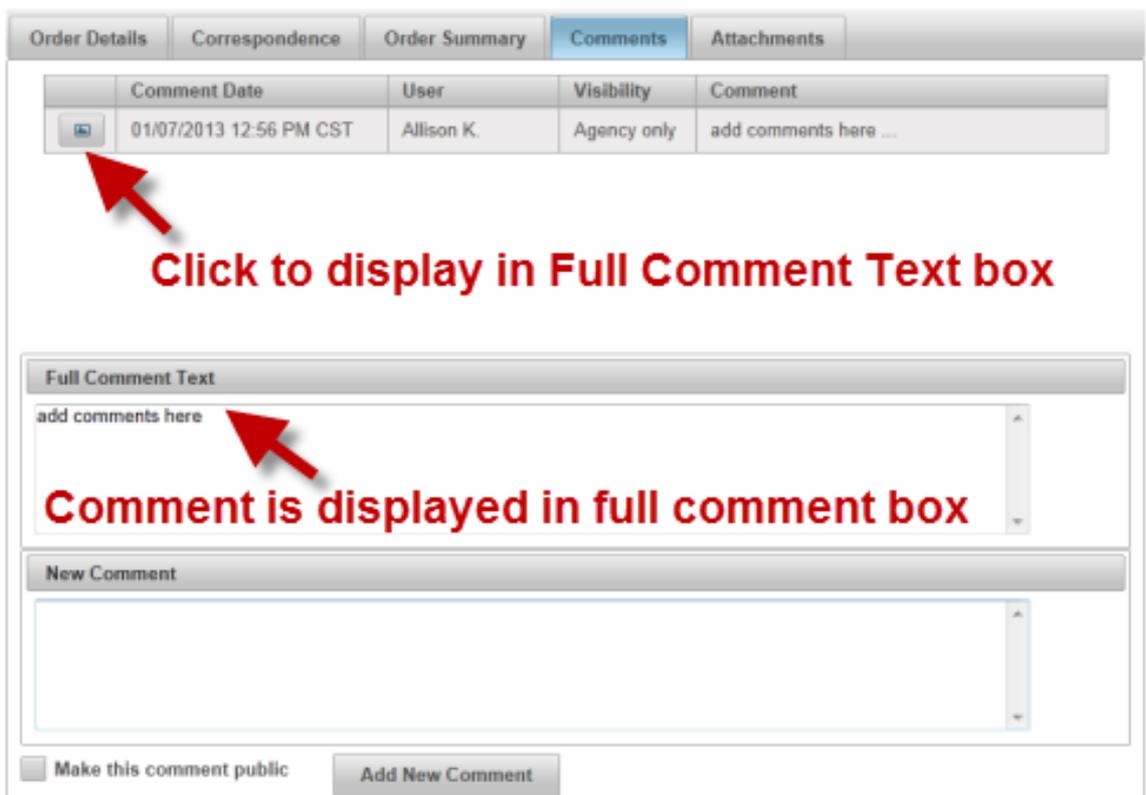
Step 3 Click [Add New Comment](#) button to add comment to order



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



Step 5 Click on image icon in comment information box to display the complete comment in [Full Comment Text](#) box



33 How to Unlock Users2

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

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

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

Step 4 Click Search button

Step 5 Search result are displayed

User ID	First Name	Last Name	Locked	Last Login Date
vpstest1@gmail.com	test	person	<input checked="" type="checkbox"/>	10/28/2010

Step 6 Click on highlighted User ID to display **Edit User** screen

Step 7 Uncheck the **Locked** box

Step 8 Click **Save** button

Step 9 User saved confirmation message appears. User is sent an email with instructions to reset

How to Use the VitalChek Product Suite

their password.

 User Information save successfully.

34 How to View Comments

How to View Comments

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

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

Full Comment Text
add comments here

New Comment
add comments here

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 Date** box

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

Full Comment Text
add comments here

New Comment
add comments here

Make this comment public Add New Comment

How to Use the VitalChek Product Suite

Step 2 Click on the image icon to display comment

	Order Details	Correspondence	Order Summary	Comments	Attachments
	Comment Date	User	Visibility	Comment	
	01/07/2013 12:56 PM CST	Allison K.	Agency only	add comments here ...	

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

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

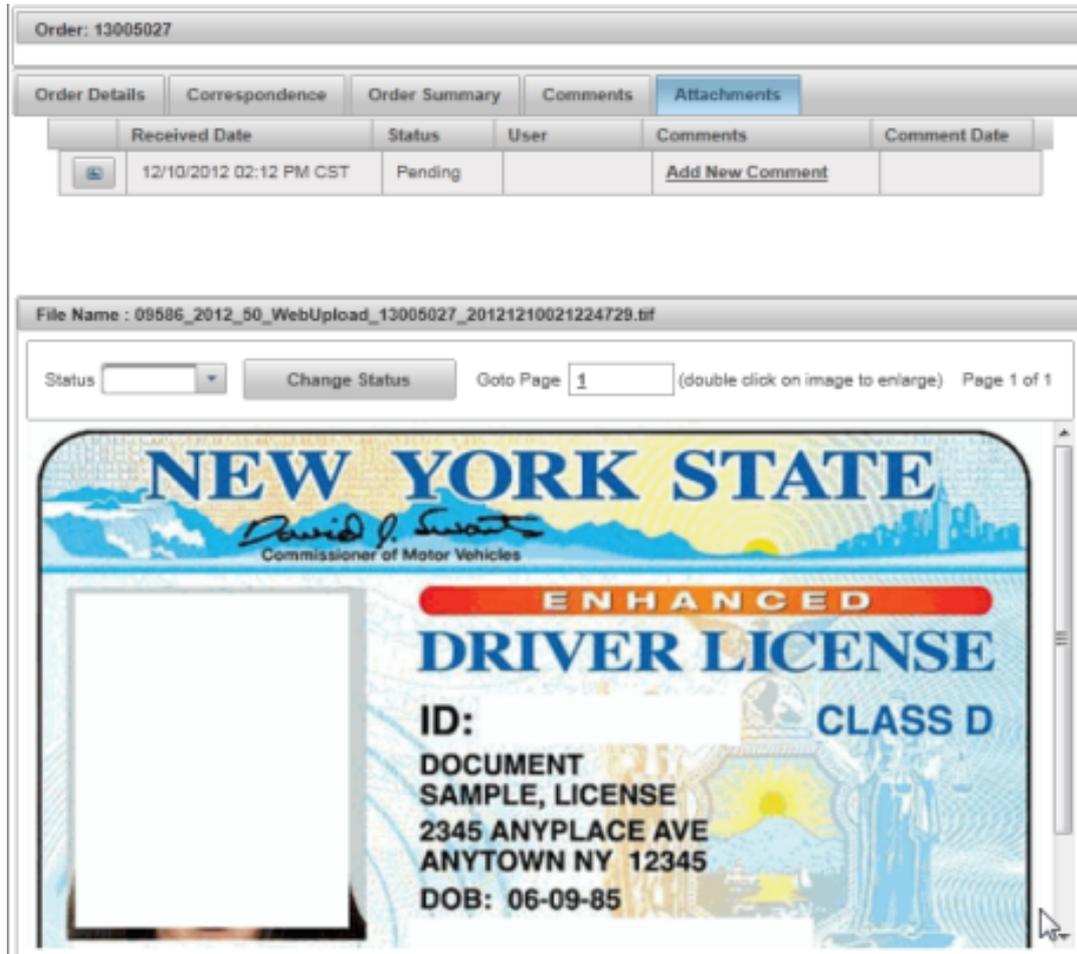
Full Comment Text

add comments here

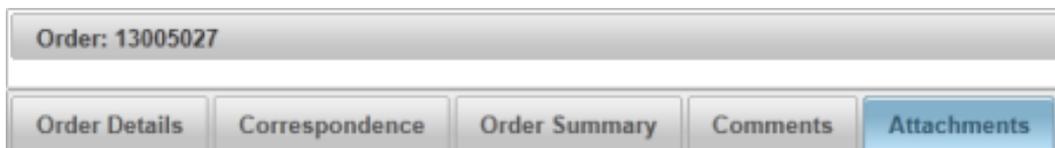
35 How to View Attachments

How to View Attachments

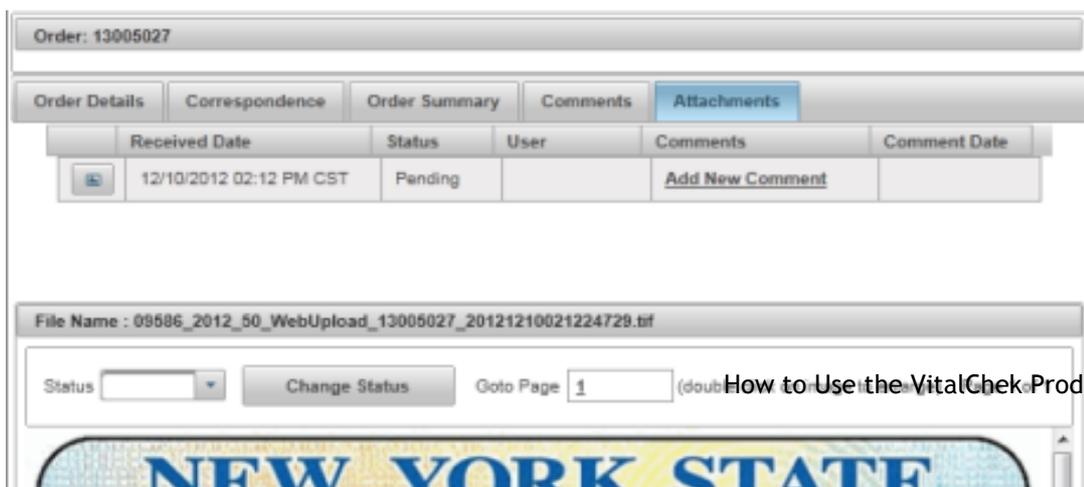
The **Attachments** tab contains images that have been attached to the order, i.e. identification verification and entitlement documents.



Step 1 When viewing the order, select **Attachments** tab.



Step 2 Images that have been attached to the order will be displayed



How to Use the VitalChek Product Suite

Step 3 Double click on the image

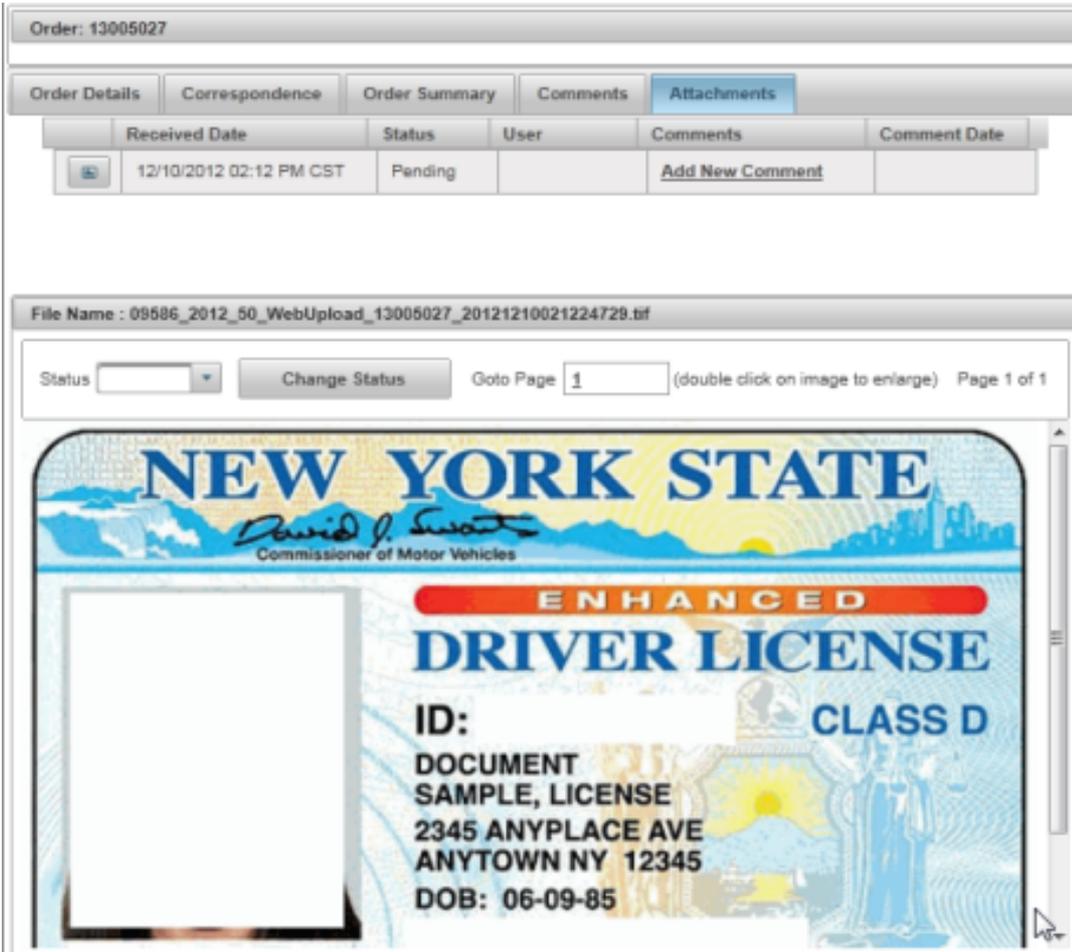
Step 4 Image will be enlarged and displayed in separate window



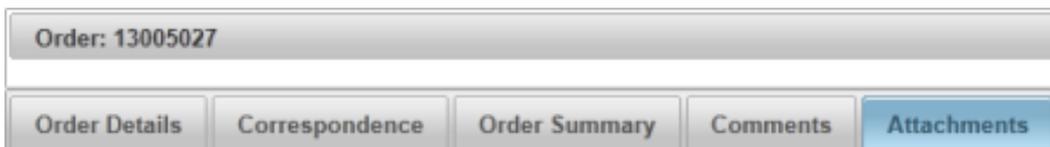
36 How to Comment on Attachments

How to Comment on Attachments

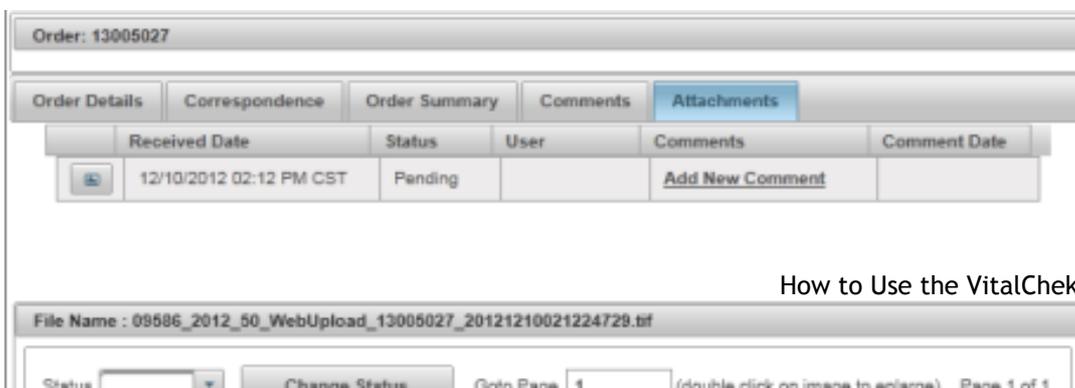
The **Attachments** tab contains images that have been attached to the order, i.e. identification verification and entitlement documents.



Step 1 When viewing the order, select **Attachments** tab.

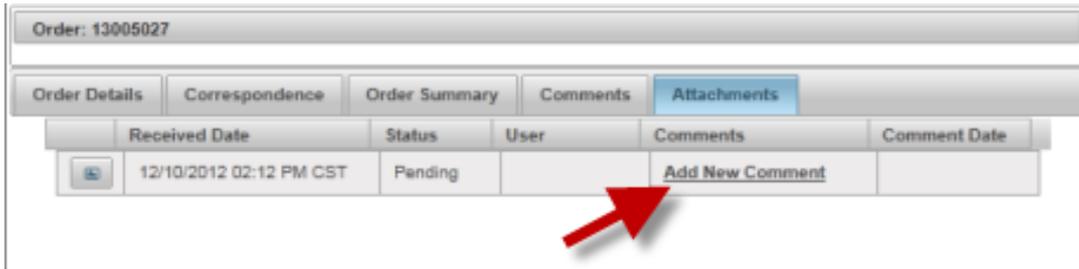


Step 2 Images that have been attached to the order will be displayed

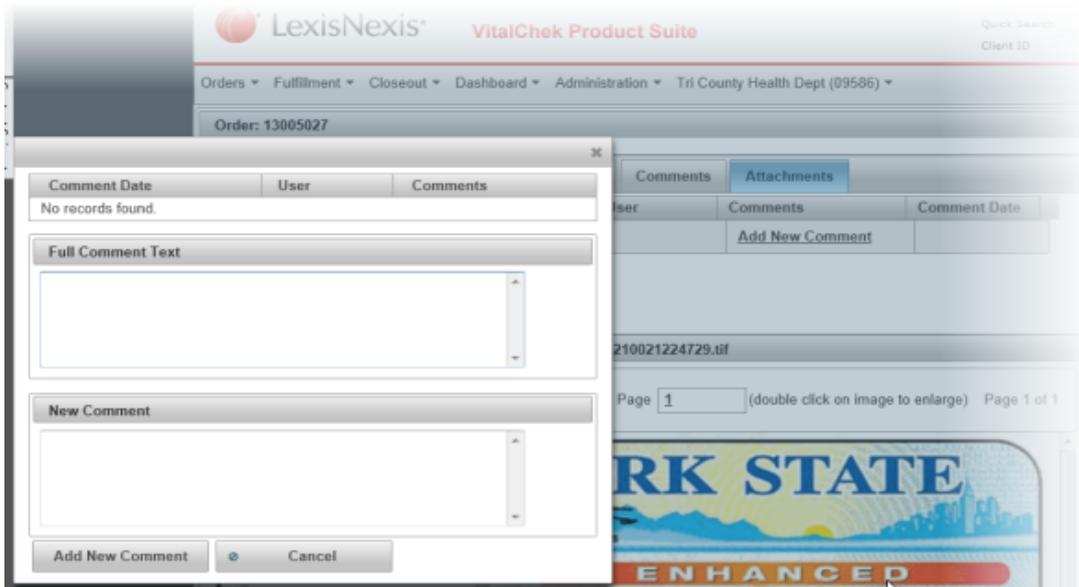


How to Use the VitalChek Product Suite

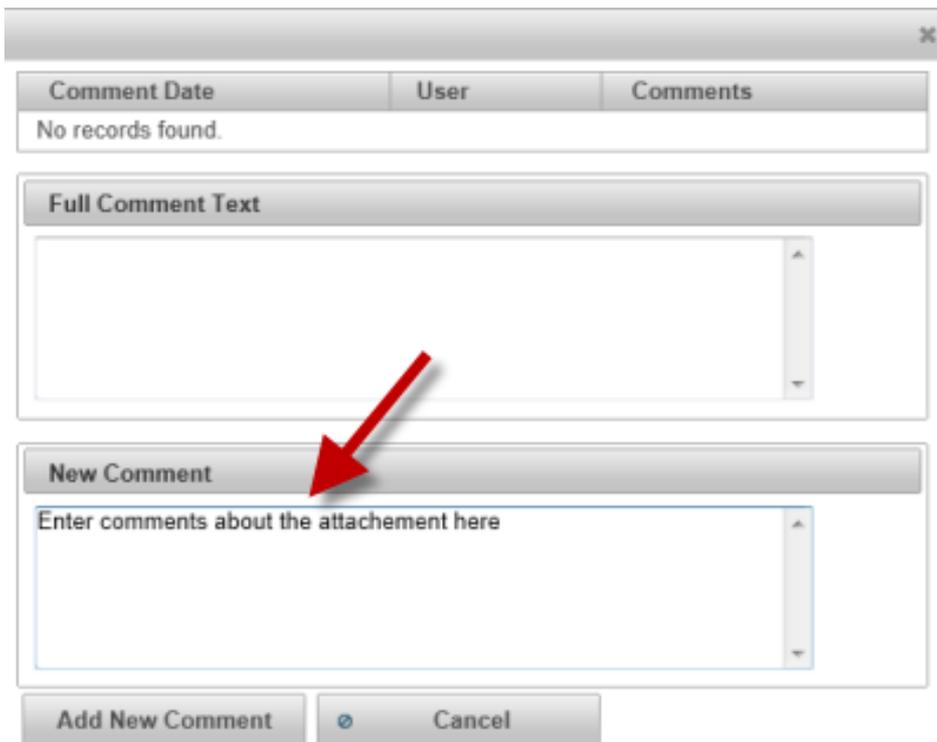
Step 3 Click [Add New Comment](#) link



Step 4 Comment box will display



Step 5 Enter comment in [Add New Comment](#) box



Step 6 Click **Add New Comment** button

Step 7 User is returned to the Attachments tab, comment is added to the image and **User** and **Comment Date** are displayed

Received Date	Status	User	Comments	Comment Date
12/10/2012 02:12 PM CST	Pending	Allison K.	Enter comments about the attachment here	01/07/2013

Click to view full comment text

Step 8 **Full Comment Text** is displayed

Comment Date	User	Comments
2013/01/07 04:21 PM CST	Allison K.	Enter comments about the attachment here ...

Full Comment Text

Enter comments about the attachment here

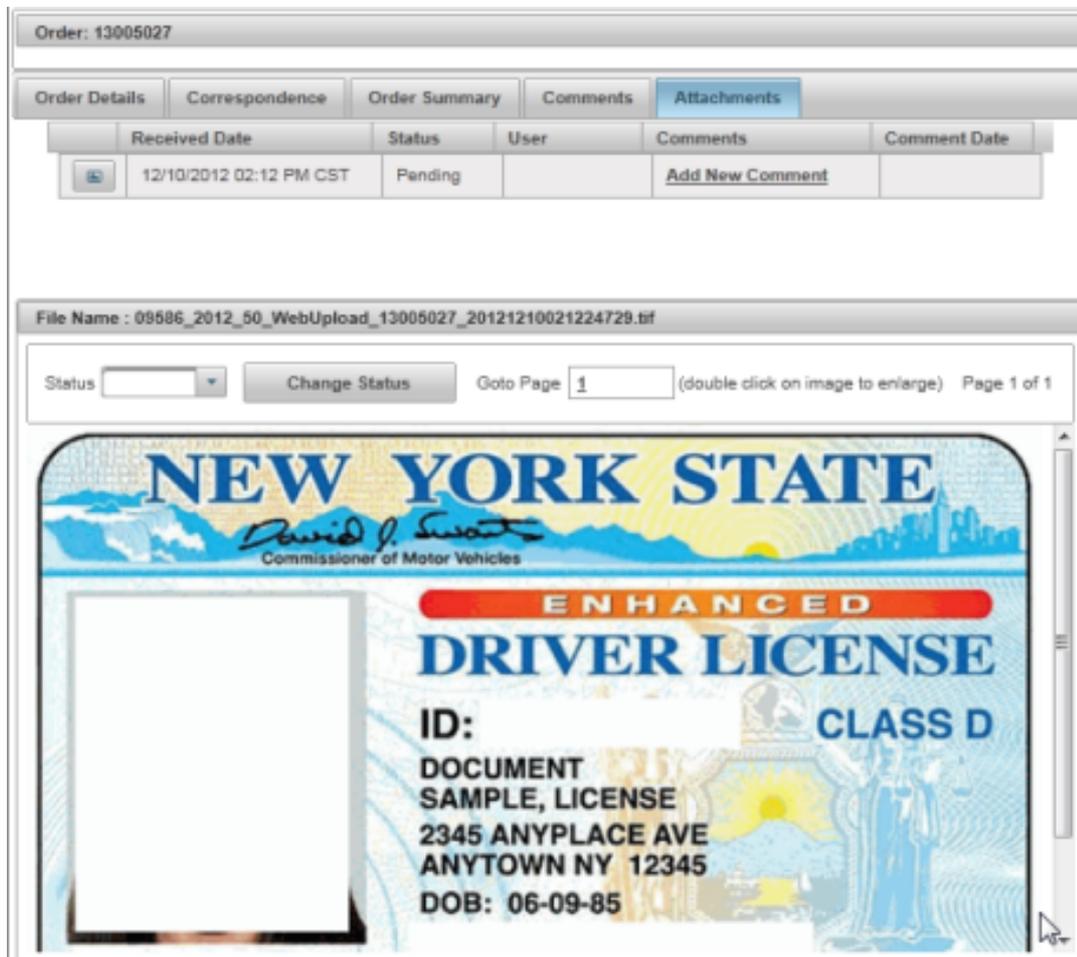
New Comment

Add New Comment Cancel

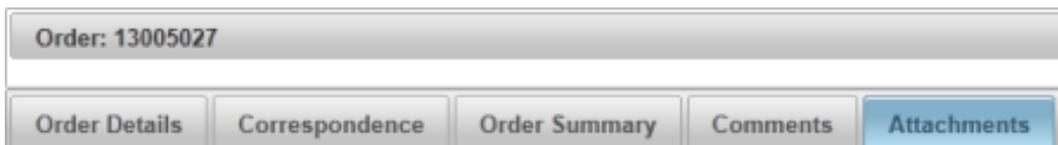
37 How to Change the Status of an Attached Image

How to Change the Status of an Attached Image

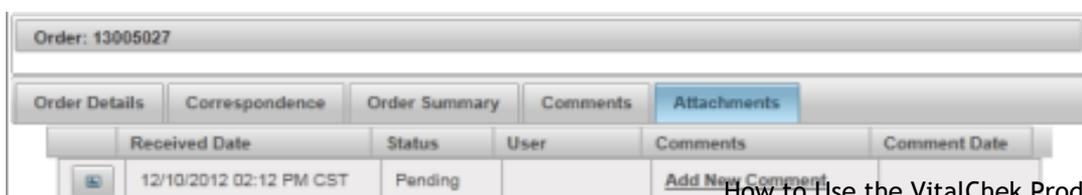
Identification verification and entitlement documents that have been uploaded to an order via the web will be visible in the attachments tab.



Step 1 When viewing the order, select **Attachments** tab or view the order from the **Scanned Image Queue** (How to View Orders in the Scanned Image Queue (Section 38))



Step 2 Images that have been attached to the order will be displayed



How to Use the VitalChek Product Suite

Step 3 Double click on the image to enlarge (if necessary)

Step 4 Image will be enlarged and displayed in separate window. Click **Next** to view next image



Step 5 Select the Status for the image from the drop down list



Step 6 Once a Status has been selected, the **Change Status** button will be visible



How to Use the VitalChek Product Suite

Step 7 Image Status changes

Order: 13005027					
Order Details	Correspondence	Order Summary	Comments	Attachments	
	Received Date	Status	User	Comments	Comment Date
	12/10/2012 02:12 PM CST	Approved	Allison K.	Enter comments about the attachment here	01/07/2013

Note - once (1 or more) images have been approved, the **Print All Approved Attachments** button displays. See [How to Print All Approved Images \(on-line documentation\)](#)

Order Details	Correspondence	Order Summary	Comments	Attachments	
	Received Date	Status	User	Comments	
	10/01/2013 01:51 PM CDT	Approved		Add New Comment	
	10/01/2013 01:51 PM CDT	Approved		Add New Comment	
	10/01/2013 01:51 PM CDT	illegible		Add New Comment	

Print All Approved Attachments

File Name : 15955_2013_40_WebUpload_13008487_20131001015118865.tif

38 How to View Orders in the Scanned Image Queue

How to View Images in the Scanned Image Queue

This Queue contains scans of images that have been attached to orders for documentation and identification requirements. Orders in this queue are awaiting entitlement verification.

The screenshot shows the 'Scanned Image Queue' search interface. At the top, there are three input fields: 'Start Date' with the value '12/04/2012', 'End Date' with the value '01/01/2013', and 'Order Source' with a dropdown menu set to 'All'. Below these fields are 'Search' and 'Clear' buttons. Underneath is a pagination bar showing 'Page (1 of 1)' and '(Total Records 1)'. The main part of the screenshot is a table with the following data:

Order Number	Image Date	Order Status	Payment Status	Product	Certificate Holder	Event Date	Applicant	Ship To	Applicant Phone
13005027	12/10/2012	Open	Unsubmitted	Birth	test testinga	02/03/1981	test testinga	test testinga	(615)-372-6800

At the bottom of the table, there is another pagination bar showing 'Page (1 of 1)' and '(Total Records 1)'.

Step 1 From the **Fulfillment** menu, select **Scanned Image Queue**. The **Scanned Image Queue** search screen displays.

This screenshot shows the 'Scanned Image Queue' search interface with empty input fields. The 'Start Date' and 'End Date' fields are empty, and the 'Order Source' dropdown menu is set to 'All'. The 'Search' and 'Clear' buttons are visible below the input fields.

Step 2 Enter a **Start Date**, or the date to begin searching for images

Start Date

Step 3 Enter an **End Date**, or the date to search up until

End Date

Step 4 Select an **Order Source** (defaults to All)

Order Source

Step 5 Click **Search** to search for all orders with selected criteria

How to Use the VitalChek Product Suite

Step 6 Available orders display in grid. Click the underlined Order Number link to view the image in the attachments tab.

Scanned Image Queue

Start Date: End Date: Order Source:

Page (1 of 1) 1 15 (Total Records 1)

Order Number	Image Date	Order Status	Payment Status	Product	Certificate Holder	Event Date	Applicant	Ship To	Applicant Phone
<u>13005027</u>	12/10/2012	Open	Unsubmitted	Birth	test testina	02/03/1981	test testina	test testina	(615)-372-6800

Page (1 of 1) 1 15 (Total Records 1)

39 How to Change the Entitlement Status

How to Change the Entitlement Status

The entitlement status for the order is displayed in the **Entitlement Status** section

A screenshot of a web interface showing the 'Entitlement Status' section. It features a 'Status' field and an 'Entitlement' dropdown menu currently set to 'Ent Approve'.

Step 1 **Awaiting Ent** status is displayed in the **Entitlement Status** section

A screenshot of the 'Entitlement Status' section where the 'Entitlement' dropdown menu is now set to 'Awaiting Ent'.

Step 2 Select approval status (per Agency) from Entitlement Status drop down selection

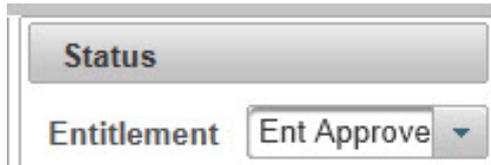
A screenshot of the 'Entitlement Status' section with the dropdown menu open. The menu shows 'Awaiting Ent' as the current selection and 'Ent Approved' as an available option. A mouse cursor is pointing at 'Ent Approved'.

Step 3 Confirmation message appears. Click OK



Step 4 **Entitlement** status is changed

How to Use the VitalChek Product Suite



A screenshot of a web form interface. It features two main input areas: a text field labeled "Status" and a dropdown menu labeled "Entitlement". The "Entitlement" dropdown menu is currently set to "Ent Approve".

40 How to Select an Agency

How to Select an Agency

Users that are able to access more than one Agency will see the [Select Agency](#) screen upon login.

Step 1

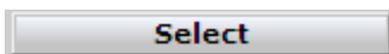
Users that are able to access more than one Agency will see the [Select Agency](#) screen after login.

Step 2

Using the drop down arrow, select from available Agencies

Step 3

Click [Select](#) button to choose Agency.



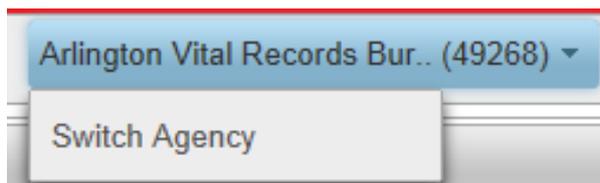
Step 4

VPS opens to selected Agency

Once logged into VPS, Users that have access to more than one Agency may change the Agency selection

Step 1

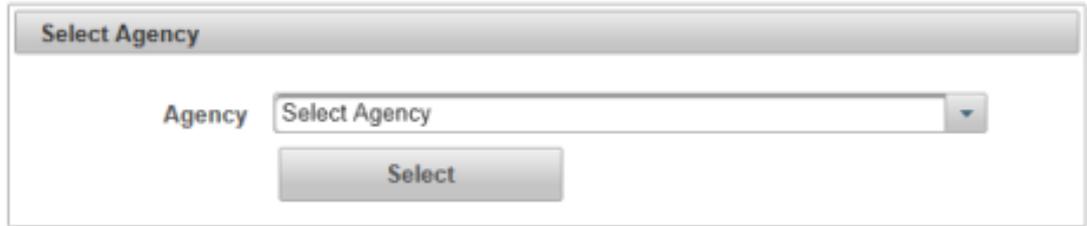
Click [Switch Agency](#) from the Agency name menu item



Step 2

[Select Agency](#) screen is displayed. Follow steps listed above to change Agency

How to Use the VitalChek Product Suite



The image shows a software dialog box titled "Select Agency". Inside the dialog, there is a label "Agency" followed by a dropdown menu. The dropdown menu currently displays the text "Select Agency" and has a small downward-pointing arrow on its right side. Below the dropdown menu is a rectangular button labeled "Select".

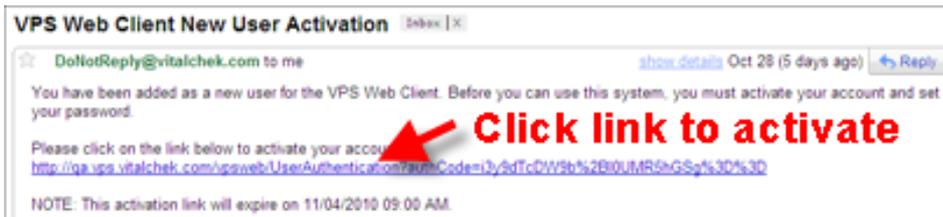
41 How to Create a New Password

Password Rules

- Password must be at least 8 characters, and no more than 20
- Password must be at least one upper and one lower case character
- Password must contain at least one numeral, and cannot start with a numeral

Step 1 VPS Administrator will create a **User**, using the email as **User ID**

Step 2 User will receive an email with link to create password



Step 3 VPS **User Activation** screen is displayed

The screenshot shows a web form titled 'User Activation'. It contains the following fields and buttons:

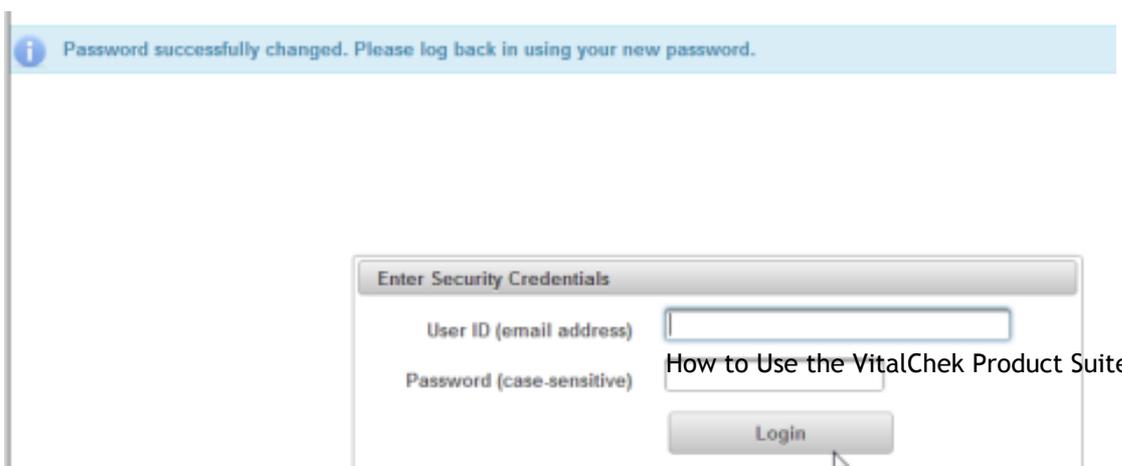
- User Name: vpsweb2.0@gmail.com
- Name: training vps
- New Password: (empty field)
- Confirm Password: (empty field)
- Activate Account button

Step 4 Enter **New Password** using Password Rules

Step 5 **Confirm New Password**

Step 6 Click **Activate Account**

Step 7 **Password successfully changed** screen displays



How to Use the VitalChek Product Suite

Step 8 Enter **User ID** and **Password** to login

42 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

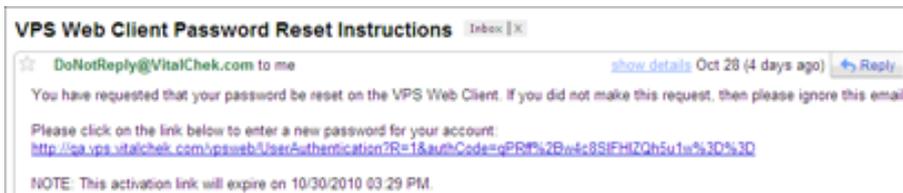
Step 4 Enter [User ID](#) (email address) if not prepopulated from login page.

Step 5 Click [Request](#) button

Step 6 Email confirmation message appears

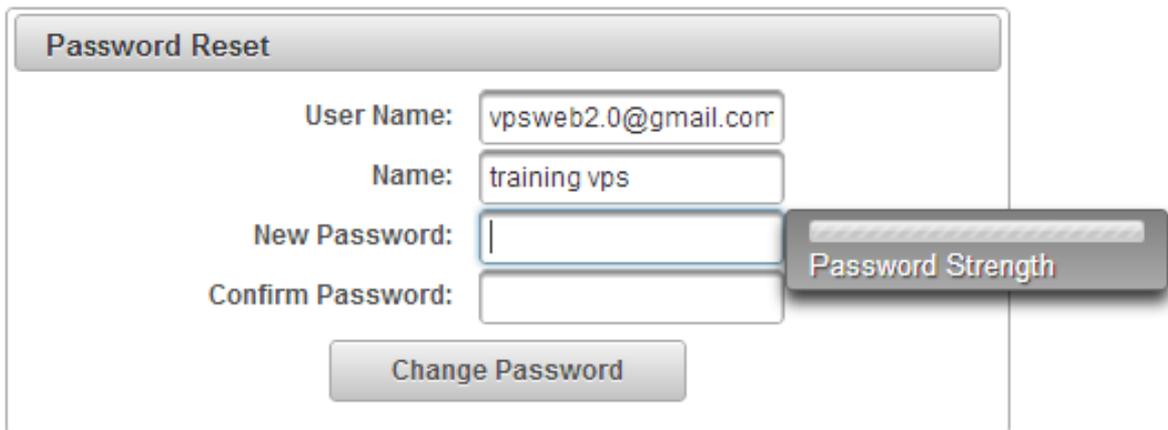
 An email will be sent to this address with password reset instructions.

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



Step Click link in the email to display the [Password Reset](#) page.

8



The screenshot shows a 'Password Reset' form with the following fields and elements:

- User Name:** vpsweb2.0@gmail.com
- Name:** training vps
- New Password:** (empty field)
- Confirm Password:** (empty field)
- Change Password** button
- Password Strength** indicator (a horizontal bar with a gradient from light to dark)

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 (Section 41)** for Password Rules*

Step 10 Confirm **New Password**

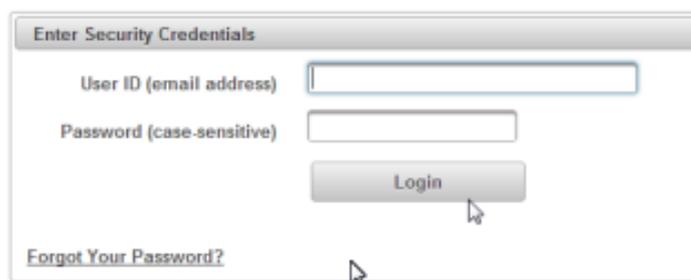
Step 11 Click **Change Password** button

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

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

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

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



The screenshot shows the 'Enter Security Credentials' form with the following fields and elements:

- User ID (email address)** input field
- Password (case-sensitive)** input field
- Login** button
- [Forgot Your Password?](#) link

VPS Version 2.0

43 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)

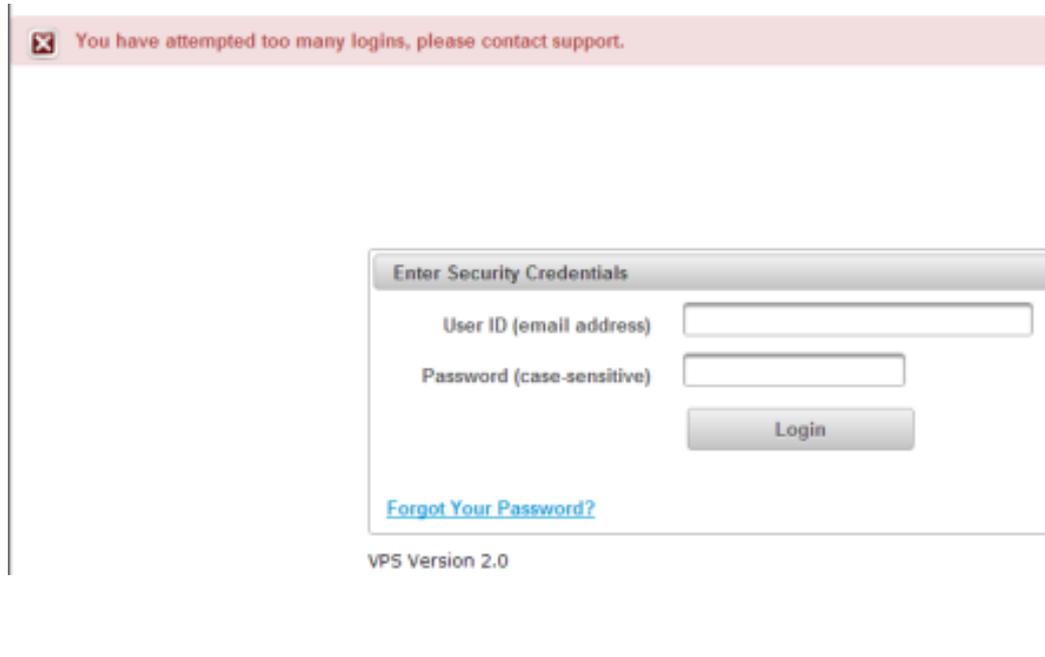
Password (case-sensitive)

[Forgot Your Password?](#)

44 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.



The screenshot displays a web interface for the VitalChek Product Suite. At the top, a red banner contains a warning icon and the text: "You have attempted too many logins, please contact support." Below this, the main content area features a login form titled "Enter Security Credentials". The form includes two input fields: "User ID (email address)" and "Password (case-sensitive)". A "Login" button is positioned below the password field. A blue hyperlink labeled "Forgot Your Password?" is located at the bottom left of the form. The text "VPS Version 2.0" is visible at the bottom of the page.

How to Use the VitalChek Product Suite

45 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.

The screenshot shows the 'Add New User' form with the following fields and options:

- User ID (email address): [Yellow highlighted text box]
- First Name: [Yellow highlighted text box]
- Last Name: [Yellow highlighted text box]
- Start Date: 12/28/2012
- End Date: 12/31/2999
- Locked:
- Expired:
- Pin: [Text box]
- Roles: Administrator, Manager, Supervisor, Clerk
- Agency: Two columns, 'Available' and 'Selected', with agency names and arrows between them.
- Buttons: Save, Cancel

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

The screenshot shows the 'User Maintenance' screen with the following elements:

- Fields: First Name, Last Name, Expired
- Buttons: Search, Clear, Add New User
- Table Header: User Name, First Name, Last Name, Locked, Expired, Last Login Date

Step 2 Click **Add New User** button



Step 3 **Add New User** screen is displayed. Required fields are highlighted yellow

This screenshot is identical to the one in the first image, showing the 'Add New User' form with required fields highlighted in yellow.

How to Use the VitalChek Product Suite

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

4 **User ID (email address)**

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

5 **First Name**

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

6 **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.*

Start Date

*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.*

End Date

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

Pin

Step 8 Select a **Role** for the User by checking the box(es) next to the role. When choosing a role, 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.

Agency

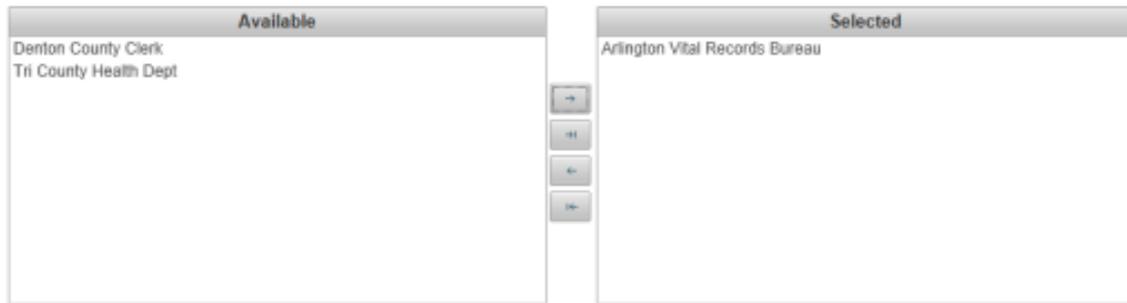
Available	Selected
Arlington Vital Records Bureau Denton County Clerk Tri County Health Dept	    

Click to add 1 agency

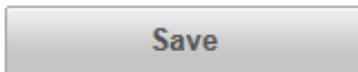
Click to add all agencies

How to Use the VitalChek Product Suite

Step 10 Selected Agency will be displayed in the right table



Step 11 Click **Save** button



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



46 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.

Step 1 From the [Administration](#) menu, select [User Maintenance](#). [User Maintenance](#) screen is displayed

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

Step 6 Search result are displayed

User Name	First Name	Last Name	Locked	Expired	Last Login Date
akirk@vitalchek.com	Akirk	Kirk		<input type="checkbox"/>	01/02/2013

Click link to display Edit User screen (with red arrow pointing to the User Name cell)

Step 7 [Edit User](#) screen displays

47 How to Reset a User's Password

How to Reset a Users Password

Administrators are able to reset user's passwords.

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

Step 3 Click **Search**

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

How to Use the VitalChek Product Suite

4

User Name	First Name	Last Name	Locked	Expired	Last Login Date
vpsweb2.0@gmail.com	training	vps	<input type="checkbox"/>	<input type="checkbox"/>	12/28/2012

Step **Edit User** screen is displayed

5

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

Locked

Expired

Pin

Roles Administrator Manager Supervisor Clerk

Agency

Available

- Denton County Clerk
- Kentucky Vital Records
- Tri County Health Dept
- Washington State Center For Health Statistics

Selected

- Arlington Vital Records Bureau

Save Cancel

Step Enter a **New Password**

6

New Password

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

9

Confirm Password

Step Click **Save**

10

Save

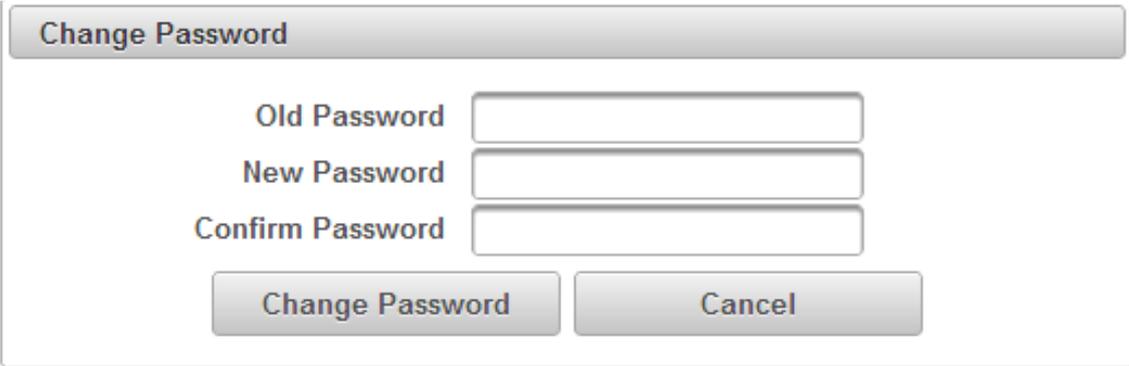
Step **User Information saved successfully** message is displayed

11

i Saving User Information was successful.

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

12



A dialog box titled "Change Password" with three input fields and two buttons. The fields are labeled "Old Password", "New Password", and "Confirm Password". The buttons are labeled "Change Password" and "Cancel".

Change Password

Old Password

New Password

Confirm Password

Change Password Cancel

48 How to Cancel an Order

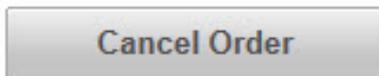
How to Cancel an Order

Orders can be cancelled at any time 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.

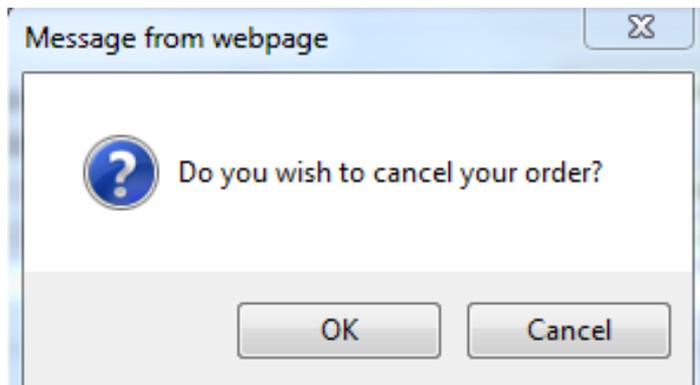
Step 1 View the order to be **Cancelled** in one of the **Order Create** tabs (**Order Details, Correspondence, Order Summary, Comments** or **Attachments**)

Line #	Product	Qty	Last Name	First Name	Event Date	City	County
1	Birth Certificate / City of Arlington	1	testing	test	01/01/1950	Abbott	Hill

Step 2 Click the **Cancel Order** button



Step 3 Cancel Order message is displayed. Click **OK** to confirm.



Step Order is cancelled and **Order Status** changes to **Cancelled**

4

Status	
Entitlement	Ent Approved
 Order	Cancelled
Payment	Refunded

Source	Phone
--------	-------

49 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**, **Correspondence**, **Order Summary**, **Comments** or **Attachments**)

Line #	Product	Qty	Last Name	First Name	Event Date	City	County
1	Birth Certificate / City of Arlington	1	testing	test	01/01/1950	Abbots	Hill

Step 2 Click the **Reinstate Order** button



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

Status
Entitlement Ent Approve
Order Open
Payment Refunded

kirk

50 Definitions

Glossary

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
Attachments Tab	Contains images that have been attached to the order, i.e. identification verification and entitlement documents and image details
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
Batch Receipts	Term used to describe the group of receipts that are created from orders that have been paid in full, with all entitlement requirements met (if applicable)
Business Units	Term used to describe agencies or offices that use VPS
Dashboard	Contains an overview of outstanding orders and order history organized by various criteria including: Shipping type, Order Entitlement and Authorization status
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
Entitlement	Agency-specific requirements detailing who is eligible to receive certificates and the documentation required. Proof of identity is verified through online Authentication process, ProChek (see Authenticate) or by submitting acceptable forms of identification.
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

How to Use the VitalChek Product Suite

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 Details Tab	Order details tab contains information about the order including: Applicant data, Certificate data, Shipping, Payment, Correspondence, Order Summary, Comments, and Attachments
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
Product	The items that can be paid for using the VPS, or any VitalChek remote processing option (i.e. birth/death/marriage certificates)
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
Scanned Image Queue	This queue contains a list of orders that have unreviewed, scanned, and uploaded images attached. The attached images are to fulfill needed documentation and identification requirements. Orders in this queue are awaiting entitlement verification by the agency.
Shipping Manifest	VPS users have the option to create a Shipping Manifest that contains the details of all orders that are being sent via UPS for the selected date. When the Shipping Manifest is created by the VPS User, the UPS tracking information is automatically emailed to customers. UPS drivers will scan the Shipping Manifest bar code when UPS packages are picked up.
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

How to Use the VitalChek Product Suite

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
Work Flow	The steps Agencies take to complete vital record requests/process orders; the full-cycle daily process used from initial placement of an order to completing all end-of-day functions for the office

51 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



The screenshot shows the UPS website interface. The top navigation bar includes 'United States', 'Log-in', and a search box. Below the navigation bar are links for 'My UPS', 'Shipping', 'Tracking', 'Freight', 'Locations', 'Support', and 'Business Solutions'. A sidebar on the left contains a menu with options: 'Track', 'Create a Shipment', 'Calculate Time & Cost', and 'Schedule a Pickup'. The 'Schedule a Pickup' option is highlighted with a red box and a red arrow. The form for scheduling a pickup includes a 'Type' dropdown menu set to 'Package/Letter', a 'Do you have pre-printed labels?' dropdown set to 'Yes', and input fields for 'Pickup City' and 'Pickup Zip Code'. A 'Continue' button is located at the bottom of the form. The main content area features a banner for 'Making eBay Shipping Easy' with a 'Sign up now' link. Below the banner are sections for 'News and Information' and 'Logistics travels everywhere'.

-OR-

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

52 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 User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal



How to Use the VitalChek Product Suite

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



53 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 selecting the **Cancel** button.



54 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



Step 4

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



How to Use the VitalChek Product Suite

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



How to Use the VitalChek Product Suite

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.



Step 12

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



How to Use the VitalChek Product Suite

Step 13

Waiting on Card Swipe screen displays on terminal



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



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



How to Use the VitalChek Product Suite

Total Amount screen displays on Pin Pad

. Select F1 for Yes or F4 for No and press the green enter button.



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.





55 How to Void a POS Transaction

How to Void a POS Transaction

POS transactions may be voided using 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 or does not have the authority for the transaction, an error message will be displayed



Step 2

Select Operation screen displays



Step 3

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



How to Use the VitalChek Product Suite

Step 4 VOID screen displays



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



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 the 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 the 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:	99999999999999
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	

How to Use the VitalChek Product Suite

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

VISA VOID RECEIPT - Agency Copy

Agency Name	
Agency Address	
Agency City, State, Zip	
MID:	999999
TID:	99999999999999
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 the VitalChek Product Suite

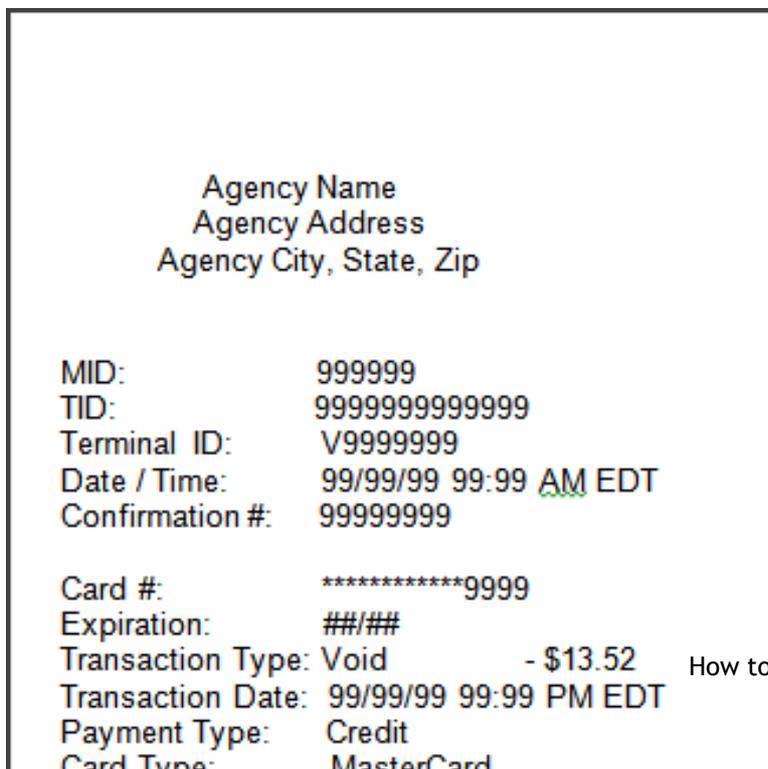
Step 8

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



How to Use the VitalChek Product Suite

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: 9999999999999999
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 the VitalChek Product Suite



56 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 or does not have the authority for the transaction, an error message will be displayed



How to Use the 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

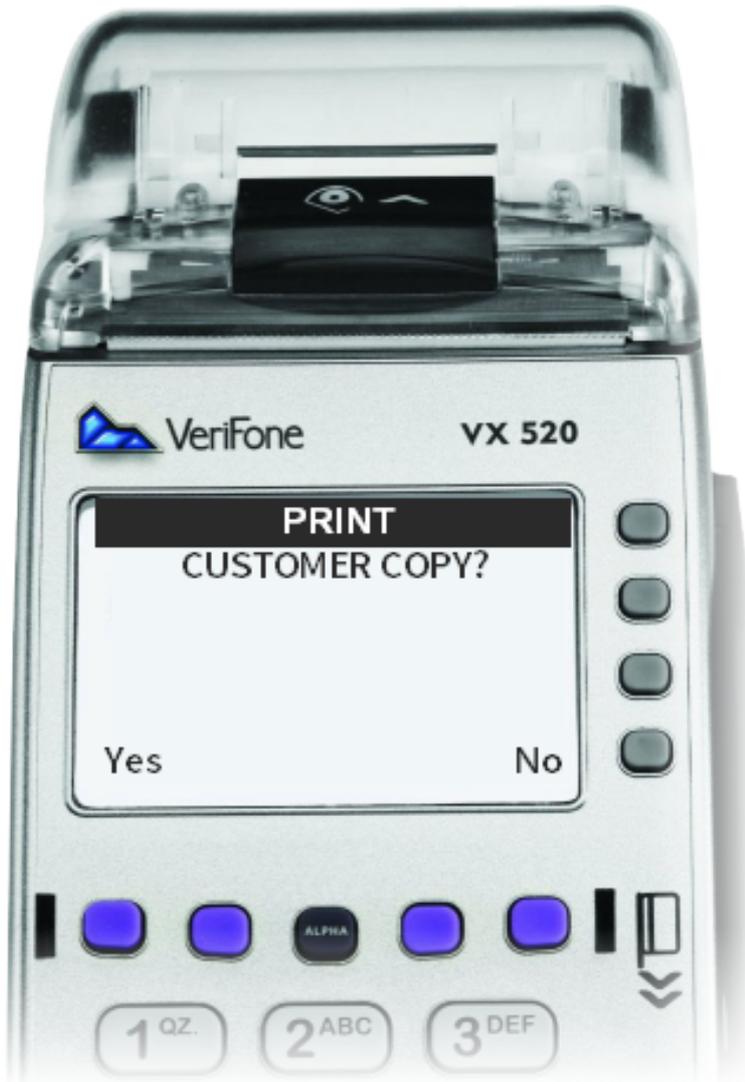
Agency Name	
Agency Address	
Agency City, State, Zip	
MID:	999999
TID:	99999999999999
Terminal ID:	V9999999
Date / Time:	99/99/99 99:99 AM EDT
Confirmation #:	99999999
Card #:	*****9999
Expiration:	##/##
Transaction Type:	
Payment/Purchase/Sale	\$13.52
Transaction Date:	99/99/99 99:99 PM EDT
Payment 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:

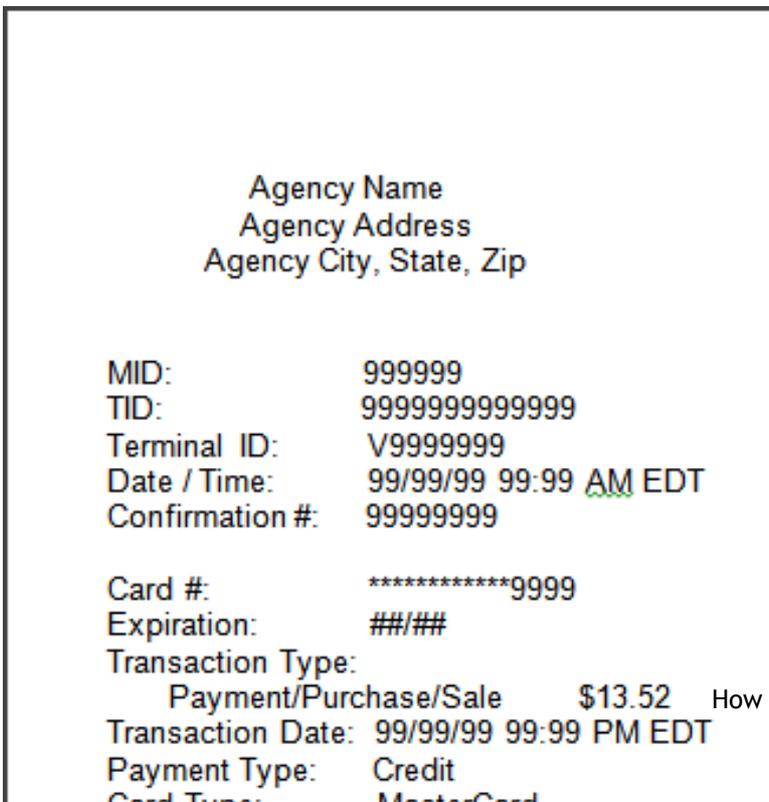
Agency Name	
Agency Address	
Agency City, State, Zip	

How to Use the VitalChek Product Suite

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



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

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 99999999999999
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

57 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

58 Helpful Hints for POS (Point of Sale)

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?"

59 Troubleshooting Tips for POS (Point of Sale)

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 bottom 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. Press the cancel button to clear the terminal.



User may 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

60 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



How to Use the VitalChek Product Suite

**Verifone VX
805 Pin Pad
Cord**



**Ethernet
Cable**



61 How to Install Point of Sale Equipment

eua8y12

How to Install Point of Sale Equipment

There are several components that arrive in the box with your Verifone equipment.

**Verifone
VX520
Terminal**



How to Use the VitalChek Product Suite

**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 Ingencio terminal, please contact our Technical Help Desk:

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

Email: vcn_helpdesk@vitalchek.com

How to Use the VitalChek Product Suite

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



Step 2 The ports are exposed



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

62 How to Handle a "No Record" with Multiple Copies

How to Handle a "No Record" with Multiple Copies

When an order:

- Is paid in full
 - Has multiple copies
 - The record is not able to be located
- a search fee will be charged.

Step 1 View the order in the **Order Details** tab.

*Note - Order must have multiple copies and a **Paid in Full** Payment Status.*

Line Item	Product	Qty	Last Name	First Name	Event Date	City	County
1	Birth - Authorized Copy	5	testing	test	12/12/1977	Acampo	San Joaquin

Step 2 Click the pencil icon to open the **Product Information** page to edit

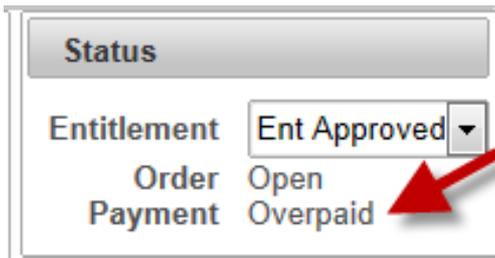
Line Item	Product	Qty	Last Name	First Name	Event Date	City	County
1	Birth - Authorized Copy	5	testing	test	12/12/1977	Acampo	San Joaquin

Step 3 The **Product Information** pages opens, change the **Product Quantity** to 1

Birth - Authorized Copy \$ 23.00

Product Quantity: 5

Step 4 **Payment Status** changes to **Overpaid**



Status	
Entitlement	Ent Approved
Order	Open
Payment	Overpaid

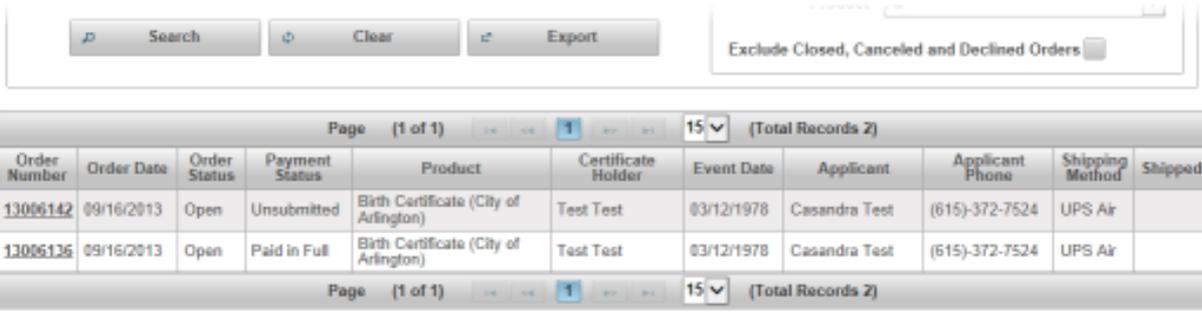
Note - when the agency completes Closeout, Agency will only be paid for 1 certificate order

Step 5 Contact VitalChek at **(800) 669-8312**, option 2 with the order number to process the customer's credit.

63 How to Export Search Results

How to Export Search Results

Search results may be exported into an Excel file and/or saved.

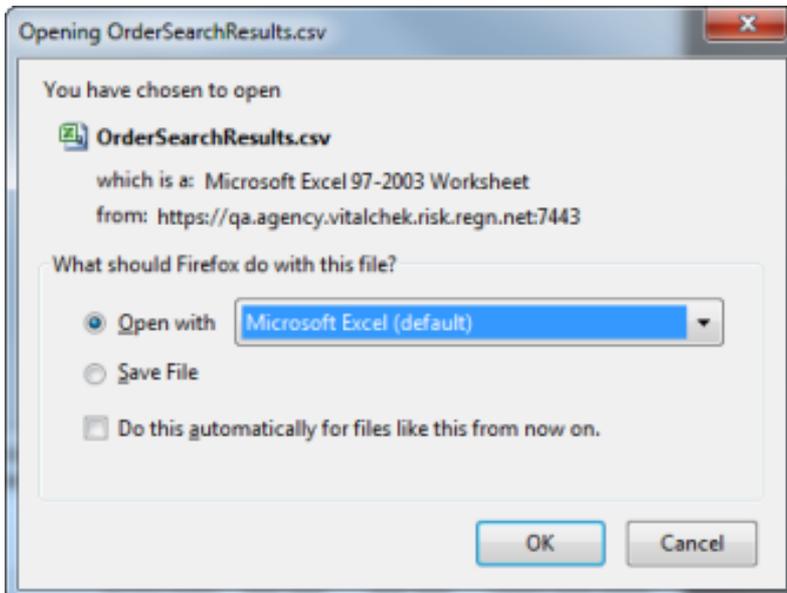


Note: To export search results when using Internet Explorer 9, please review [Accessing VPS \(on-line documentation\)](#)

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

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

	A	B	C	D	E	F	G	H	I	J	K	L
1	Order Nur	Order Date	Order Stat	Payment	Product	Certificate	Event Date	Applicant	Ship To	Applicant Phone		
2	13005520	1/1/2013	Open	Unsubmit	Birth Cert	Test Test	3/12/1985	test testin	test testin	(615)-372-7524		
3	13005519	1/1/2013	Open	Overpaid	Birth Cert	Test Test	3/12/1985	test testin	test testin	(615)-372-7524		
4	13004992	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
5	13004991	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
6	13004990	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
7	13004989	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
8	13004988	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
9	13004987	12/10/2012	Open	Unsubmit	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
10	13004984	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
11	13004983	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
12	13003821	11/5/2012	Open	Paid in Fu	Birth Cert	Test Test	3/12/1985	test testin	test testin	(615)-372-7524		
13	13003818	11/5/2012	Closed	Paid in Fu	Birth Cert	Test Test	3/12/1985	dklj skj dfj	dklj skj dfj	(615)-372-7524		

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