## Table of Contents

1. Table of Contents .................................................. 1-3
2. How to Login to VitalChek Product Suite ......................... 4
3. How to Print Batch Receipts .......................................... 5-9
4. How to Create Batch Receipts Using a Saved Config ............ 10-12
5. How to Reprint a Batch Receipt ..................................... 13-15
6. How to Reprint a Batch Receipt Summary ......................... 16-17
7. How to Ship Funeral Home Orders .................................. 18
8. How to Generate Shipping Labels ................................... 19-20
9. How to Void Shipping Labels ........................................ 21-22
10. How to Print a Detail Report with Manifest ..................... 23-25
11. How to Generate a New UPS Manifest ............................ 26-27
12. How to Reprint a Previous UPS Manifest .......................... 28-30
13. How to Process Regular Mail ...................................... 31-32
14. How to Search for Orders Using Advanced Criteria ......... 33-34
   Order Search
15. How to Use Quick Search .......................................... 35
16. How to Close Orders with a Check ............................... 36-39
17. How to Reprint a Report .......................................... 40-42
18. How to Process an Incomplete Close ............................. 43-45
19. How to Enter Applicant Data ..................................... 46-50
20. How to Enter Birth Certificate Data .............................. 51-54
21. How to Enter Death Certificate Data .............................. 55-57
22. How to Enter Marriage Certificate Data ......................... 58-60
23. How to Enter Divorce Certificate Data ............................ 61-63
24. How to Enter Official Records Data ............................... 64-65
25. How to Enter Shipping Data 66-67
26. How to Enter Payment with a Personal Check (electronic) 68-73
27. How to Enter Payment with a Credit Card 74-77
28. How to Void a Payment 78-79
29. How to Copy Orders 80-81
30. How to Send New Correspondence 82-84
31. How to View and Resend Previous Correspondence 85-86
32. How to Add Comments to an Order 87-88
33. How to Unlock Users2 89-90
34. How to View Comments 91-92
35. How to View Attachments 93-94
36. How to Comment on Attachments 95-97
37. How to Change the Status of an Attached Image 98-100
38. How to View Orders in the Scanned Image Queue 101-102
39. How to Change the Entitlement Status 103-104
40. How to Select an Agency 105-106
41. How to Create a New Password 107-108
42. How to Reset a Forgotten Password 109-110
43. How to Change an Expired Password 111-112
44. How to Reset a Password 113
45. How to Add New Users 114-116
46. How to Search for Users 117-118
47. How to Reset a User’s Password 119-121
48. How to Cancel an Order 122-123
49. How to Reinstatate a Cancelled Order 124
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.

Step 1 Enter **User ID**

Step 2 Enter **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.

Step 4 After Login, VPS displays
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.*

**Step 6** Click **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.

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

**Step** Receipts are displayed in a .Pdf
How to Use the VitalChek Product Suite

Scroll to view entire receipt
Step 9 Click Print button to print receipts

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

Step 11 User is returned to VPS, Create Receipts screen

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 remained checked until the Clear button is
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.

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.
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

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
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

Step 6  **Batch Report** will display in .pdf window
Step 4

Reprint Batch Receipt(s) by clicking on printer icon
# How to Reprint a Batch Receipt Summary

## Note
- The 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 view and access Batch Receipts.

### Step 1
From the Fulfillment menu, select Batch Receipts. Create Receipt tab is displayed.

### Step 2
Click Reprint Receipt Summary tab.

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

<table>
<thead>
<tr>
<th>Date</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>01/07/2011</td>
<td></td>
</tr>
<tr>
<td>&lt;&lt; &lt; January, 2011 &gt;&gt;</td>
<td>x</td>
</tr>
</tbody>
</table>

[Calendar Image]

How to Use the VitalChek Product Suite
Step 4 Click **Search** button

Step 5 **Search Results** are displayed

Step 6 Click **Document ID** number link to select Batch to reprint summary.

Step 7 **Batch Summary Report** will display in a .pdf

Step 8 Click printer icon to print report
## 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).

### 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

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.

Step 2 Enter Order Number and click Submit button

*Note - User can also enter Order Number and a plus sign (“+”) at the end of the number. Order will automatically submit*  

![Order Number](image)

Step 3 Order(s) will be displayed in table. Check box will be checked to generate shipping label

Step 4 Click Generate Labels button

Step 5 Shipping label message is displayed; click Print button
Step 6  Shipping label will generate and appear in a pdf window

Step 7  Click printer icon to print label(s)
How to Void Shipping Labels

Shipping labels can be voided using the Void Labels tab.

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

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

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

Step 3
Type the Order Number and click Submit button.

Step 4
Order is displayed in the table with check box checked by default.
### How to Use the VitalChek Product Suite

<table>
<thead>
<tr>
<th>Step 6</th>
<th>Click Void Labels button</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Void Labels" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 7</th>
<th>Labels voided successfully message appears</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Labels voided successfully" /></td>
</tr>
</tbody>
</table>
10  How to Print a Detail Report with 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

Step 5  Manifest/Detail Reports window displays

![Manifest/Detail Reports window](image)

Click image icon to view report

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

![Detail Shipping Report](image)

Step 7  Click printer icon to print

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

*Note - if the manifest is not created, email will be automatically sent to the customer the evening the order was batched.*
How to Use the VitalChek Product Suite

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: 51739

<table>
<thead>
<tr>
<th>Item</th>
<th>Record Ordered</th>
<th>Qty</th>
<th>Price</th>
<th>Extra Copies</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Birth / Statewide (Raised Seal)</td>
<td>1</td>
<td>$23.00</td>
<td>$0.00</td>
<td>$23.00</td>
</tr>
</tbody>
</table>

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

PICKUP SUMMARY BAR CODE REPORT
SHIPDATE: JAN 13, 2011
SHIPPING RECORD: 1616 2399 14
ACCOUNT NUMBER: 123 - 456

CUSTOMER
MARK CASE
VITALCHEK NETWORK INC
SUITE 400
6 CADILLAC DRIVE
BRENTWOOD TN 37027

94 123 456 1616 23991 00004 7

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.*
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
How to Use the VitalChek Product Suite

Step 4
Click **Generate** button

Step 5
**Reprint Previous** Manifest box displays defaulted to current date.
Enter a date to for which to reprint the manifest for or use the calendar to select a date.

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

Step 7
**Manifest Report displays in .pdf**

PICKUP SUMMARY BAR CODE REPORT
SHIPDATE: JAN 13, 2011
SHIPPING RECORD: 1616 2399 14
ACCOUNT NUMBER: 123 - 456
CUSTOMER
MARK CASE
VITALCHEK NETWORK INC
SUITE 400
6 CADILLAC DRIVE
BRENTWOOD TN 37027

94 123 456 1616 23991 00004 7
Step 8
Click printer icon to print
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.

---

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

**Step 2** Click **Mail** tab to display **Mail** screen

**Step 3** Enter **Order Number**

**Step 4** Click **Submit** button

**Step 5** Order information is displayed
### 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
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 Interface](image)

*Note - to search by Custom Fields:*

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

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)

Step 1 Enter VPS order number into Quick Search box or the Client ID in the Client ID field

Step 2 Click magnifying glass icon

Step 3 Search results are displayed in Order Details screen
## 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.

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

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

### Step 4
Available order to close are displayed in **Orders to Close** table.
Note - To exclude order(s) from the close:

1. Click to highlight order in Orders to Close table

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

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

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

Step 5
Click Process Close button

Step 6
Close job report screen appears while close is processing

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

Step 8
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:**

![Detail Report Image]

**Summary Report:**

![Summary Report Image]

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

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

**Step 11**
Click OK button

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

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

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

Step 6  Click on Date/Time line to select closeout.

Step 7  Available Reports for selected date are displayed.

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

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
How to Enter Applicant Data

Data about the person placing the order is in the **Applicant Data** section. Required fields are shaded yellow.

Agencies that use Authentication to verify identify will display the **Authenticate** section in the **Applicant Data**

---

**Step 1**
Enter **First Name** of the person placing the order

**Step 2**
Enter **Middle Name** of the person placing the order

**Step 3**
Enter **Last Name** of the person placing the order
Step 4  Choose suffix (Mr., Mrs. Ms..) from the drop down list

Step 5  Enter Email address of the person placing the order

Step 6  Select Domestic, International, Military for person placing the order

Step 7  Enter Zip Code of person placing the order. This will populate the City and
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

Step 12 Enter **Country** of residence of person placing the order

Step 13 Enter 10 digit **Phone** number (plus extension, if required) of person placing the order
### How to Use the VitalChek Product Suite

#### Step 14
Enter **10 digit Fax** number of person placing the order

#### Authentication

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DOB</strong></td>
<td>Enter <strong>Date of Birth</strong> of person placing the order (2 digit month, 2 digit day and 4 digit year)</td>
</tr>
<tr>
<td><strong>SSN</strong></td>
<td>Enter <strong>Social Security Number</strong> of person placing the order. Can enter last 4 numbers of SSN or all 9 numbers.</td>
</tr>
<tr>
<td><strong>Authentication</strong></td>
<td>Click <strong>Authenticate</strong> button to submit and process Authentication information</td>
</tr>
<tr>
<td><strong>Status/Attempts</strong></td>
<td><strong>Status</strong> displays the results of the Authentication process (Passed or Failed) and <strong>Attempts</strong> displays the number of times the applicant clicked the <strong>Authenticate</strong> button to submit the information.</td>
</tr>
</tbody>
</table>

*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.
How to Enter Birth Certificate Data

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

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.

Step 2
Click Add button

Step 3
Birth 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.

   County

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 **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.

Step 13 Select a suffix from the drop down list.

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

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

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

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

Step 18 Enter the (certificate holder's) father's **Last Name**

Step 19 Select a **Suffix** for the (certificate holder's) father (if required)

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

Step 21 Enter the (certificate holder's) mother's **Middle Name** (if required)

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

Step 22 Select a **Suffix** for the (certificate holder's) mother (if required)

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.

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

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

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.

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.

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")

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)

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

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

Step Enter the Last Name of the person that is listed on the certificate
How to Use the VitalChek Product Suite

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

OK
22 How to Enter Marriage Certificate Data

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

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.

Step 2 Click Add button

Step 3 Marriage Certificate page displays
Step 4 Enter Event Date in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.

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

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.

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.

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

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)

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

Step 11 Enter the Middle Name (if required) of the Groom that is listed on the certificate.
### How to Use the VitalChek Product Suite

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Enter the <strong>Last Name</strong> of the Groom that is listed on the certificate</td>
</tr>
<tr>
<td>13</td>
<td>Select a suffix from the drop down list</td>
</tr>
<tr>
<td>16</td>
<td>Enter <strong>Bride Data</strong>, starting with the Bride's <strong>First Name</strong></td>
</tr>
<tr>
<td>17</td>
<td>Enter the Bride's <strong>Middle Name</strong> (if required)</td>
</tr>
<tr>
<td>18</td>
<td>Enter the Bride's <strong>Maiden Name</strong></td>
</tr>
<tr>
<td>19</td>
<td>Select a <strong>Suffix</strong> for the Bride (if required)</td>
</tr>
<tr>
<td>20</td>
<td>Click <strong>OK</strong> to continue order or <strong>Cancel</strong> to cancel product information</td>
</tr>
</tbody>
</table>
How to Enter Divorce Certificate Data

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

**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.*

**Step 2** Click **Add** button

**Step 3** **Divorce 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.

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

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.

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.

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")

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)

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

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

Step 12 Enter the Last Name of the Groom that is listed on the certificate
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>Select a suffix from the drop down list</td>
</tr>
<tr>
<td>16</td>
<td>Enter <strong>Bride Data</strong>, starting with the Bride's <strong>First Name</strong></td>
</tr>
<tr>
<td>17</td>
<td>Enter the Bride's <strong>Middle Name</strong> (if required)</td>
</tr>
<tr>
<td>18</td>
<td>Enter the Bride's <strong>Maiden Name</strong></td>
</tr>
<tr>
<td>19</td>
<td>Select a <strong>Suffix</strong> for the Bride (if required)</td>
</tr>
<tr>
<td>20</td>
<td>Click <strong>OK</strong> to continue order to <strong>Cancel</strong> to cancel product information</td>
</tr>
</tbody>
</table>
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.

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.

Step 2 Click Add button

Step 3 Official Record page displays

![Official Records](image)
<table>
<thead>
<tr>
<th>Step 4</th>
<th>Enter <strong>Amount</strong> of the Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 5</td>
<td>Enter the <strong>Document Number</strong></td>
</tr>
<tr>
<td>Step 6</td>
<td>Enter the <strong>Document Type</strong></td>
</tr>
<tr>
<td>Step 7</td>
<td>Confirm if certified copies are required, <strong>Yes</strong> or <strong>No</strong></td>
</tr>
<tr>
<td>Step 8</td>
<td>Click the <strong>OK</strong> button to continue order or <strong>Cancel</strong> to cancel product</td>
</tr>
</tbody>
</table>
25 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

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

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

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

Step 3 Enter First Name of the person the order ships to

Step 4 Enter Middle Name of the person the order ships to

Step 5 Enter Last Name of the person the order ships to

Step 6 Select Suffix of the person the order ships to from drop down list
Step 7  Select address type from drop down (Domestic, International, Military)

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

Step 9  Enter shipping street Address

Step 10 If necessary, enter additional shipping Address information

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

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

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

Step 14 Enter 10 digit Phone number of person the order is shipped to
How to Enter Payment with a Personal Check (electronic)

Payment can be made using a personal check in the Payment section.

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.

Step 2  Click Add button
Step 3  **Payment** screen for Check selection is displayed

![Payment Screen](image)

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](image)

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](image)

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

![Multiple/Partial Payments](image)

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

![Payment Amount](image)

Step 6  Check **Disclaimer Confirmation** box indicating the caller has been informed of the
Step 7  Enter **Routing No.** (number) of the checking account used for payment

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

Step 9  Enter **Drivers License No.** (number) of the person who is making payment (using their checking account)

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

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

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

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

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

Step 14  Reenter **Check No.** (**Conf**) of the check used for payment
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**
Step 26  Enter **State** of the person making the payment on the order (checking account holder)

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

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

Step 29  Click **OK** button

Step 30  Check payment confirmation is displayed

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

Step 32  Order is authorized and the following is displayed:
How to Use the VitalChek Product Suite

Authorized message appears:

Payment Status changes to Paid in Full:

Payment information in Status section displays Authorized
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.

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

Step 2 Click Add button

Step 3 Payment screen is displayed for credit card payments.
Step 4  Check Same as 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.

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.

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

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

Step 6  Enter Credit Card No. (number)

Step 7  Enter credit card 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)

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

Step 11 Enter Last Name of person making payment on the order (credit card holder)
How to Use the VitalChek Product Suite

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

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

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

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

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

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

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

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

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

Step 21  Click **OK** button

Step 22  Credit card payment information is displayed
Step 24  **Authorize Payment button will display, click to authorize payment**

![Authorize Payment button](image)

Step 25  Order is authorized and the following is displayed:

![Authorized message](image)

Authorized message appears:

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

![Payment Status](image)

Payment information in Status section displays **Authorized**

![Payment Information](image)
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)

**Step 2** Click the Void button

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

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

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

**Step 2** Select Delivery Type from the available drop down list; Delivery Type defaults to email if an email has been provided.
**Step 3**
Applicant's **Email** is autopopulated from order detail, revise if needed

Email: akirk@vitalchek.com

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

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

Click **Generate** to send an email

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

If **Email** is selected -

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

If **Email** is selected -

Click **Generate** to send an email
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.

When checked, the Make this correspondence Public box will allow VitalChek employees to see.

Step 6 Correspondence sent message appears

Your correspondence has been successfully sent.
How to View and Resend Previous Correspondence

Correspondence that has been sent to the customer is listed in the **Previous Correspondence** section.

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

**Step 2**
Click **Previous** tab. **Previous** Correspondence is displayed.
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.

Your correspondence has been successfully resent.
32 How to Add Comments to an Order

Comments are added to an order in the Comments section, from the Comments tab.

**How to Add Comments to an Order**

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

**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.
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
### How to Unlock Users

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From the Administration menu, select User Maintenance. User Maintenance screen is displayed.</td>
</tr>
<tr>
<td>2</td>
<td>Enter (at least) first letter of First Name of User.</td>
</tr>
<tr>
<td>3</td>
<td>Enter (at least) first three letters of Last Name of User.</td>
</tr>
<tr>
<td>4</td>
<td>Click Search button.</td>
</tr>
<tr>
<td>5</td>
<td>Search result are displayed.</td>
</tr>
<tr>
<td>6</td>
<td>Click on highlighted User ID to display Edit User screen.</td>
</tr>
<tr>
<td>7</td>
<td>Uncheck the Locked box.</td>
</tr>
<tr>
<td>8</td>
<td>Click Save button.</td>
</tr>
<tr>
<td>9</td>
<td>User saved confirmation message appears. User is sent an email with instructions to reset.</td>
</tr>
</tbody>
</table>
their password.

User Information save successfully.
34 How to View Comments

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

**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.
How to Use the VitalChek Product Suite

Step 2  Click on the image icon to display comment

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

Step 8 Full Comment Text is displayed.
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
Step 7  Image Status changes

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)
How to View Orders 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.

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

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

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

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

Step 5  Click **Search** to search for all orders with selected criteria
**Step 6**  Available orders display in grid. Click the underlined Order Number link to view the image in the attachments tab.
39  How to Change the Entitlement Status

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

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

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

**Step 3**  Confirmation message appears. Click OK.

**Step 4**  Entitlement status is changed.
How to Use the VitalChek Product Suite
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

Select Agency

Agency: Select Agency

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

**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

Click link to activate
How to Use the VitalChek Product Suite

Step 8  Enter **User ID** and **Password** to login
How to Reset a Forgotten Password

Upon entering VitalChek Product Suite, the User will be presented with a **Enter Security Credentials** login page.

**Step 1**
To reset a forgotten password, Enter **User ID** (email address).

**Step 2**
Click the **Forgot Your Password?** link.

**Step 3**
**Request Password Reset** screen will be displayed.

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

**Step 5**
Click **Request** button.

**Step 6**
Email confirmation message appears.

**Step 7**
**VPS Password Reset Instructions** email is sent to User.

**Step**
Click link in the email to display the **Password Reset** page.
**How to Use the VitalChek Product Suite**

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**

Step 13 Enter **User ID** and new **Password** to login
How to Change an Expired Password

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

Step 1 Enter 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
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.
How to Add New Users

Add New User screen contains information on VPS Users. Required information is highlighted yellow.

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

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

Step 2 Click Add New User button.

Step 3 Add New User screen is displayed. Required fields are highlighted yellow.
Step 4 Enter your User ID; must be a valid email address.

Step 5 Enter your First Name.

Step 6 Enter your 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.

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

Step 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

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.
### How to Use the VitalChek Product Suite

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Selected Agency will be displayed in the right table</td>
</tr>
<tr>
<td>11</td>
<td>Click <strong>Save</strong> button</td>
</tr>
<tr>
<td>12</td>
<td>Confirmation message that User is receiving an email to activate their user ID is displayed</td>
</tr>
</tbody>
</table>

*User information saved successfully. Activation email has been sent.*
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

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

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

Step 5
Click Search button

Step 6
Search result are displayed

Step 7
Edit User screen displays
How to Reset a User's 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

Search results are displayed. Click underlined User Name link
Step 5  Edit User screen is displayed

Step 6  Enter a New Password

Step 9  Enter new password again in Confirm Password field

Step 10  Click Save

Step 11  User Information saved successfully message is displayed

Step 12  When User logs into VPS, the Change Password screen will display
How to Use the VitalChek Product Suite

![Change Password Form](image-url)
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)

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
<table>
<thead>
<tr>
<th>Status</th>
<th>Entitlement</th>
<th>Order</th>
<th>Payment</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ent Approved</td>
<td>Cancelled</td>
<td>Refunded</td>
<td>Phone</td>
</tr>
</tbody>
</table>
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).

Step 2: Click the Reinstate Order button.

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

## Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Verification System</td>
<td>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.</td>
</tr>
<tr>
<td>Administrator</td>
<td>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.</td>
</tr>
<tr>
<td>Attachments Tab</td>
<td>Contains images that have been attached to the order, i.e. identification verification and entitlement documents and image details.</td>
</tr>
<tr>
<td>Authenticate</td>
<td>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.</td>
</tr>
<tr>
<td>Batch Receipts</td>
<td>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).</td>
</tr>
<tr>
<td>Business Units</td>
<td>Term used to describe agencies or offices that use VPS.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Contains an overview of outstanding orders and order history organized by various criteria including: Shipping type, Order Entitlement and Authorization status.</td>
</tr>
<tr>
<td>Declined Payment</td>
<td>Payment was not authorized by the bank (the card has not been charged); the response from the bank will be: “declined payment”.</td>
</tr>
<tr>
<td>Detail Report</td>
<td>Report that is generated during the Closeout process showing individual orders that are being closed.</td>
</tr>
<tr>
<td>Entitlement</td>
<td>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.</td>
</tr>
<tr>
<td>Manager</td>
<td>A role that is assigned in VPS allowing the user to enter, search, and modify orders, as well as perform voids and Closeout functions.</td>
</tr>
<tr>
<td>Order</td>
<td>The information retained in the VPS system regarding the payment.</td>
</tr>
<tr>
<td><strong>Order Closeout</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Order Details Tab</strong></td>
<td>Order details tab contains information about the order including: Applicant data, Certificate data, Shipping, Payment, Correspondence, Order Summary, Comments, and Attachments.</td>
</tr>
<tr>
<td><strong>Order Grid</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Order Receipt</strong></td>
<td>The receipt displaying the order and payment information, can be printed from the VPS System.</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>The individual code that allows users to access the VPS System.</td>
</tr>
<tr>
<td><strong>Product</strong></td>
<td>The items that can be paid for using the VPS, or any VitalChek remote processing option (i.e. birth/death/marriage certificates).</td>
</tr>
<tr>
<td><strong>Roles</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Scanned Image Queue</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Shipping Manifest</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Summary Report</strong></td>
<td>Report that is generated during the Closeout process showing a summary of all orders that are being closed.</td>
</tr>
<tr>
<td><strong>Supervisor</strong></td>
<td>A role that is assigned in VPS allowing the user to enter, search, and modify orders as well as perform voids.</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td>The term for any person that has been given access to the VPS system.</td>
</tr>
<tr>
<td><strong>User Name</strong></td>
<td>The unique identifier that allows the User to logon to the VPS System. Must be unique to the VPS System across all business units.</td>
</tr>
<tr>
<td><strong>VPS</strong></td>
<td>VitalChek Product Suite; the VitalChek software application</td>
</tr>
<tr>
<td>---------</td>
<td>---------------------------------------------------------</td>
</tr>
<tr>
<td><strong>VitalChek</strong></td>
<td>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</td>
</tr>
<tr>
<td><strong>Void Transaction</strong></td>
<td>The steps that are completed to cancel a payment</td>
</tr>
<tr>
<td><strong>Work Flow</strong></td>
<td>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</td>
</tr>
</tbody>
</table>
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](http://www.UPS.com)

-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
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.
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.
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
**Total Amount** screen displays on Pin Pad.

Step 18

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

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.*
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
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.
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**

![VOID RECEIPT - Agency Copy](image)
Note - Transactions using a VISA card will display 2 authorization lines:

VISA VOID RECEIPT - Agency Copy

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Agency Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 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 |

<table>
<thead>
<tr>
<th>Product Name</th>
<th>$1.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345</td>
<td></td>
</tr>
</tbody>
</table>

| Agency Amount: - $1.00 |
| LexisNexis Service Fee: - $2.50 |
| Total Fee: - $3.50 |

Cardholder Signature

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

Merchant Copy
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
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: 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: 9999999

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: 9999999

Product Name 12345 $1.00

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

Total Fee: - $3.50

Customer Copy
How to Print Last Receipt

Users can reprint the last receipt that was printed on the POS terminal.

Step 1

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

*Note - if the Operator ID was entered incorrectly of does not have the authority for the transaction, an error message 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

Note - Payment made with a Visa card will display 2 authorization lines:
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: V99999999
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: 99999999

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: 99999999

Product Name 12345 $1.00

Agency Amount: $1.00
LexisNexis Service Fee: $2.50
Total Fee: $3.50

Customer Copy
# Point of Sale Keys

Additional keys are used periodically to initiate actions/jobs.

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
<th>Action Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Cancel Key" /></td>
<td>Cancel an un-submitted transaction</td>
<td>Press Cancel button</td>
</tr>
<tr>
<td><img src="image2.png" alt="Backspace Key" /></td>
<td>Backspace to remove alpha or numeric characters</td>
<td>Press back button</td>
</tr>
<tr>
<td><img src="image3.png" alt="Alpha Key" /></td>
<td>Type alpha characters</td>
<td>Press Alpha button</td>
</tr>
<tr>
<td><img src="image4.png" alt="Scroll Key" /></td>
<td>Scroll to another screen</td>
<td>Press scroll button</td>
</tr>
</tbody>
</table>
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?”
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
Point of Sale Equipment

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

Verifone VX520 Terminal

Verifone
How to Use the VitalChek Product Suite
How to Use the VitalChek Product Suite

Verifone VX 805 Pin Pad Cord

Ethernet Cable
How to Install Point of Sale Equipment

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

Verifone
VX520
Terminal
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
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.*

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

Step 3  The Product Information pages opens, change the Product Quantity to 1
Step 4  Payment Status changes to 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.
How to Export Search Results

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

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

Step 1 After search results have been displayed, click Export button

Step 2 Order Search Results box opens

Step 3 Choose Open with, Save File and/or Do this automatically options

Step 4 Click OK to submit selection
**Step 5** Order is displayed in Excel (for **Open with** option) or saved (for **Save File** option)

![Excel screenshot]

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Order Number</td>
<td>Order Date</td>
<td>Status</td>
<td>Payment</td>
<td>Product</td>
<td>Certificates</td>
<td>Event Date</td>
<td>Applicant</td>
<td>Ship To</td>
<td>Applicant Phone</td>
</tr>
<tr>
<td>2</td>
<td>13005520</td>
<td>1/1/2013</td>
<td>Open</td>
<td>Unsubmit Birth Cert Test Test</td>
<td>3/12/1985</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(615)-372-7524</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>13005519</td>
<td>1/1/2013</td>
<td>Open</td>
<td>Overpaid Birth Cert Test Test</td>
<td>3/12/1985</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(615)-372-7524</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>13004992</td>
<td>12/10/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>1/1/1950</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(555)-111-1111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>13004991</td>
<td>12/10/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>1/1/1950</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(555)-111-1111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>13004989</td>
<td>12/10/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>1/1/1950</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(555)-111-1111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>13004988</td>
<td>12/10/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>1/1/1950</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(555)-111-1111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>13004987</td>
<td>12/10/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>1/1/1950</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(555)-111-1111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>13004986</td>
<td>12/10/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>1/1/1950</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(555)-111-1111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>13004985</td>
<td>12/10/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>1/1/1950</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(555)-111-1111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>13003821</td>
<td>11/5/2012</td>
<td>Open</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>3/12/1985</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(615)-372-7524</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>13003818</td>
<td>11/5/2012</td>
<td>Closed</td>
<td>Paid in Fund Birth Cert Test Test</td>
<td>3/12/1985</td>
<td>test test test test</td>
<td>test test test test</td>
<td>(615)-372-7524</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Index

Administration
- How to Search for Users, 117-118
- How to Reset a User’s Password, 119-121
- How to Unlock Users2, 89-90
- How to Add New Users, 114-116

Closeout
- How to Close Orders with a Check, 36-39
- How to Reprint a Report, 40-42
- How to Process an Incomplete Close, 43-45

Definitions, 125-127

Fulfillment
- How to Print Batch Receipts, 5-9
- How to Create Batch Receipts Using a Saved Config, 10-12
- How to Reprint a Batch Receipt, 13-15
- How to Reprint a Batch Receipt Summary, 16-17
- How to Ship Funeral Home Orders, 18
- How to Generate Shipping Labels, 19-20
- How to Void Shipping Labels, 21-22
- How to Print a Detail Report with Manifest, 23-25
- How to Generate a New UPS Manifest, 26-27
- How to Reprint a Previous UPS Manifest, 28-30
- How Do I Contact UPS for Pick-Up, 128
- How to Process Regular Mail, 31-32
- How to View Orders in the Scanned Image Queue, 101-102

Getting Started
- How to Select an Agency, 105-106
- How to Create a New Password, 107-108
- How to Login to VitalChek Product Suite, 4
- How to Reset a Forgotten Password, 109-110
- How to Change an Expired Password, 111-112
- How to Reset a Password, 113

Helpful Hints for POS (Point of Sale), 161
- How Do I Contact UPS for Pick-Up, 128
- How to Add Comments to an Order, 87-88
- How to Add New Users, 114-116
- How to Cancel an Order, 122-123
How to Change an Expired Password, 111-112
How to Change the Entitlement Status, 103-104
How to Change the Status of an Attached Image, 98-100
How to Close Orders with a Check, 36-39
How to Comment on Attachments, 95-97
How to Copy Orders, 80-81
How to Create a New Password, 107-108
How to Create Batch Receipts Using a Saved Config, 10-12
How to Enter Applicant Data, 46-50
How to Enter Birth Certificate Data, 51-54
How to Enter Death Certificate Data, 55-57
How to Enter Divorce Certificate Data, 61-63
How to Enter Marriage Certificate Data, 58-60
How to Enter Official Records Data, 64-65
How to Enter Payment with a Credit Card, 74-77
How to Enter Payment with a Personal Check (electronic), 68-73
How to Enter Shipping Data, 66-67
How to Export Search Results, 174-175
How to Generate a New UPS Manifest, 26-27
How to Generate Shipping Labels, 19-20
How to Handle a "No Record" with Multiple Copies, 172-173
How to Install Point of Sale Equipment, 167-171
How to Log Off the POS Terminal, 131
How to Log on to the POS Terminal, 129-130
How to Login to VitalChek Product Suite, 4
How to Print a Detail Report with Manifest, 23-25
How to Print Batch Receipts, 5-9
How to Print Last Receipt, 153-159
How to Process an Incomplete Close, 43-45
How to Process Regular Mail, 31-32
How to Reinstall a Cancelled Order, 124
How to Reprint a Batch Receipt, 13-15
How to Reprint a Batch Receipt Summary, 16-17
How to Reprint a Previous UPS Manifest, 28-30
How to Reprint a Report, 40-42
How to Reset a Forgotten Password, 109-110
How to Reset a Password, 113
How to Reset a User’s Password, 119-121
How to Use the VitalChek Product Suite

How to Run a POS Transaction, 132-141
How to Search for Orders Using Advanced Criteria Order Search, 33-34
How to Search for Users, 117-118
How to Select an Agency, 105-106
How to Send New Correspondence, 82-84
How to Ship Funeral Home Orders, 18
How to Unlock Users2, 89-90
How to Use Quick Search, 35
How to View and Resend Previous Correspondence, 85-86
How to View Attachments, 93-94
How to View Comments, 91-92
How to View Orders in the Scanned Image Queue, 101-102
How to Void a Payment, 78-79
How to Void a POS Transaction, 142-152
How to Void Shipping Labels, 21-22

Orders
How to Enter Applicant Data, 46-50
How to Enter Birth Certificate Data, 51-54
How to Enter Death Certificate Data, 55-57
How to Enter Marriage Certificate Data, 58-60
How to Enter Divorce Certificate Data, 61-63
How to Enter Official Records Data, 64-65
How to Enter Shipping Data, 66-67
How to Enter Payment with a Personal Check (electronic), 68-73
How to Enter Payment with a Credit Card, 74-77
How to Void a Payment, 78-79
How to Send New Correspondence, 82-84
How to View and Resend Previous Correspondence, 85-86
How to Add Comments to an Order, 87-88
How to View Comments, 91-92
How to View Attachments, 93-94
How to Comment on Attachments, 95-97
How to Change the Status of an Attached Image, 98-100
How to Change the Entitlement Status, 103-104
How to Cancel an Order, 122-123
How to Reinstate a Cancelled Order, 124
How to Handle a "No Record" with Multiple Copies, 172-173

Point of Sale (POS)
How to Log on to the POS Terminal, 129-130
How to Log Off the POS Terminal, 131
How to Run a POS Transaction, 132-141
How to Void a POS Transaction, 142-152
How to Print Last Receipt, 153-159
Point of Sale Keys, 160
Helpful Hints for POS (Point of Sale), 161
Troubleshooting Tips for POS (Point of Sale), 162-163
Point of Sale Equipment, 164-166
How to Install Point of Sale Equipment, 167-171

Point of Sale Equipment, 164-166
Point of Sale Keys, 160

Reference
Definitions, 125-127

Search
How to Export Search Results, 174-175
How to Search for Orders Using Advanced Criteria Order Search, 33-34
How to Use Quick Search, 35
How to Copy Orders, 80-81

Troubleshooting Tips for POS (Point of Sale), 162-163