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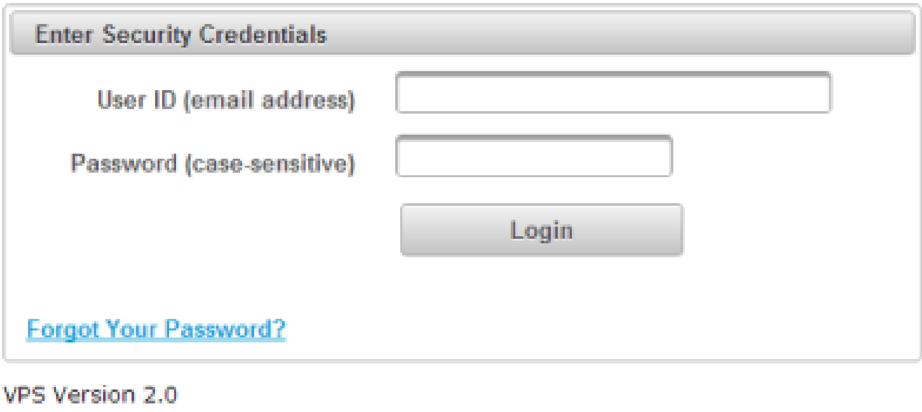
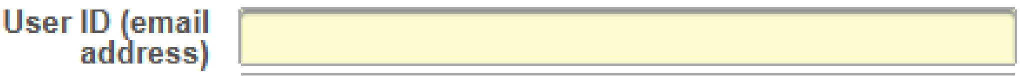
2 How to Login to VitalChek Product Suite

How to Login to VPS

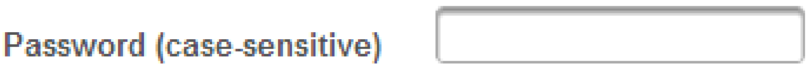
Upon entering VitalChek Product Suite, the User will be presented with a **Enter Security Credentials** login page



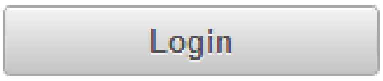
Step 1 Enter **User ID**



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



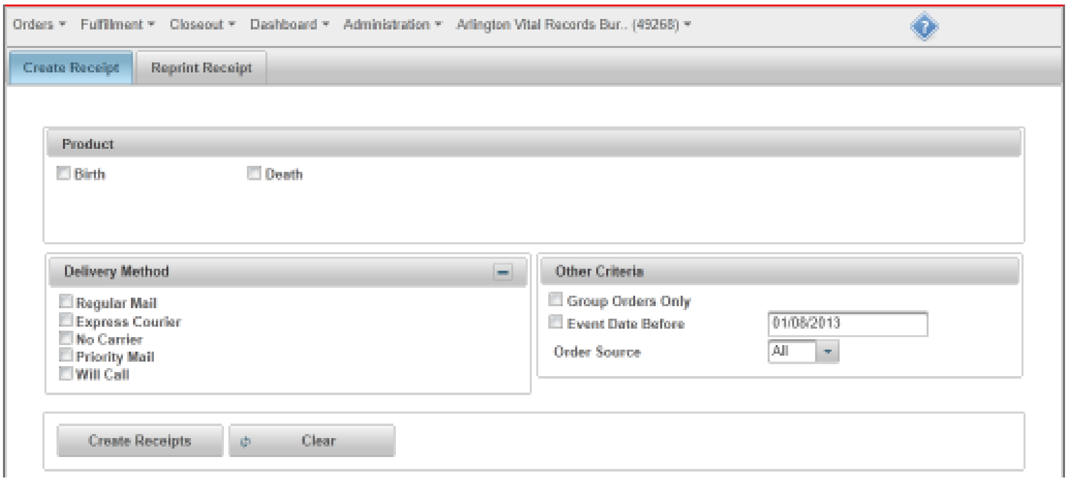
Step 4 After Login, VPS displays

3 How to Print Batch Receipts

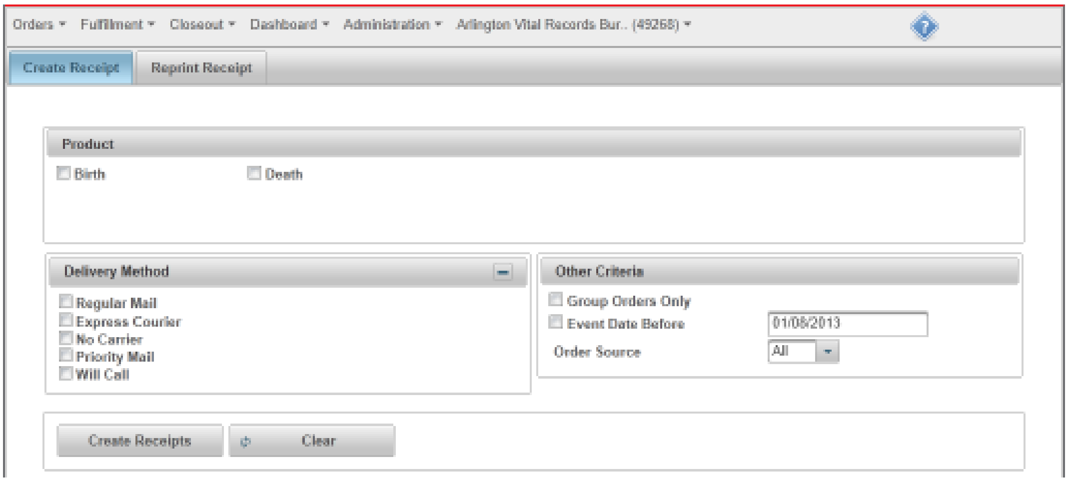
How to Print Batch Receipts

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**

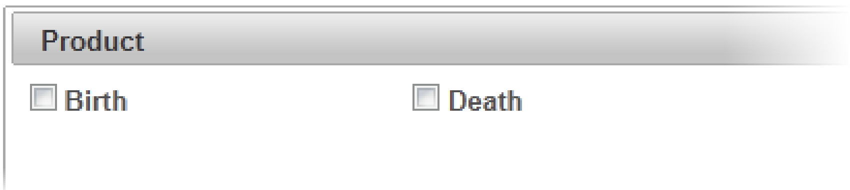


Step 1 From the **Fulfillment** menu, select **Batch Receipts.** Opens on **Create Receipt** tab.



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.



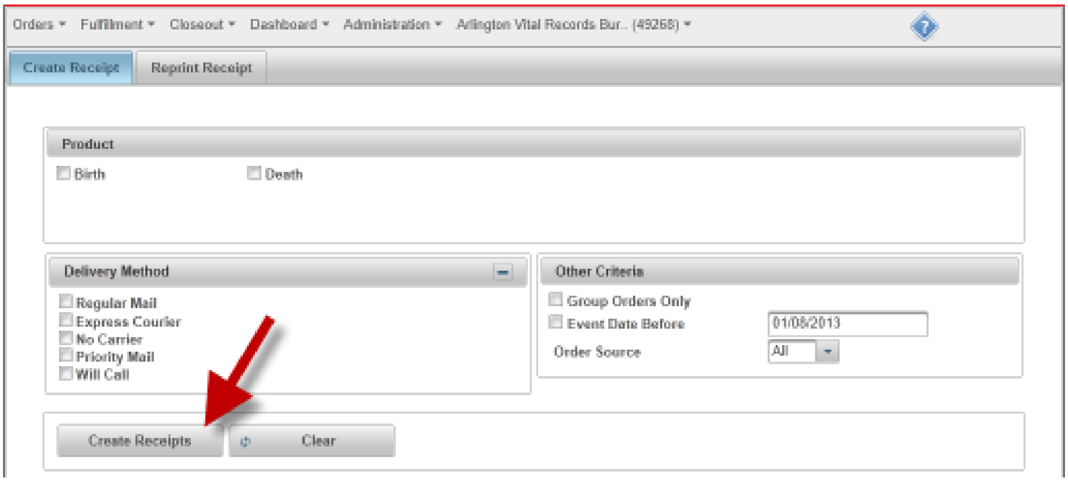
Step 3 Select **Delivery Method** to include in the batch.

Note - if user does not select any Delivery Methods, all available will be included in the batch.

Step 4 Select any **Other Criteria.**

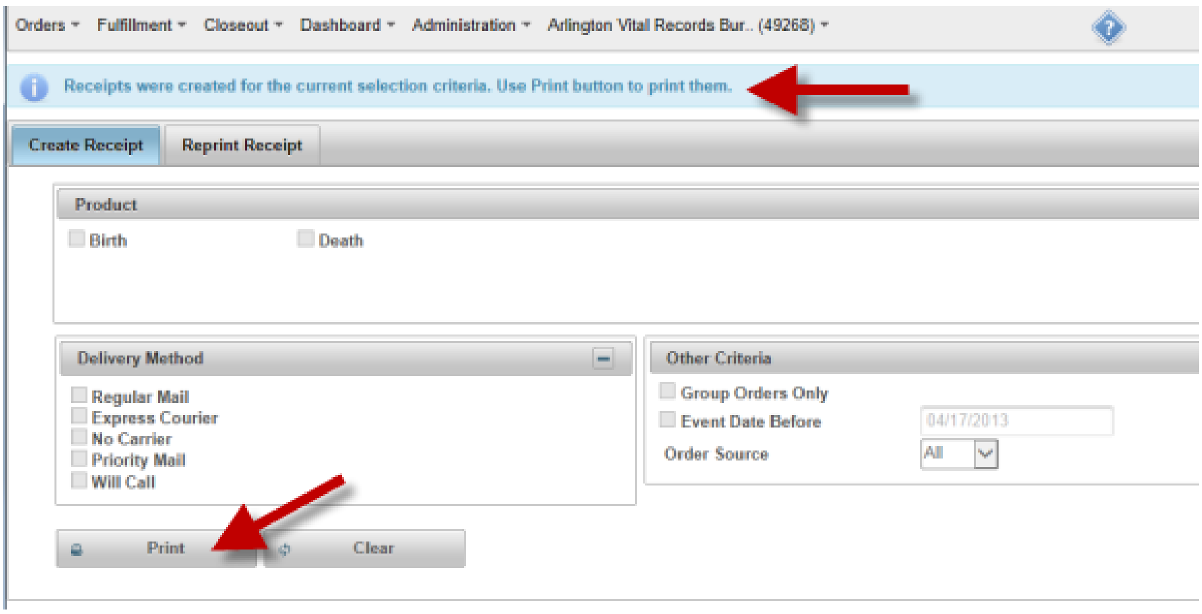
Note - if user does not select any Other Criteria, all available will be included in the batch.

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*

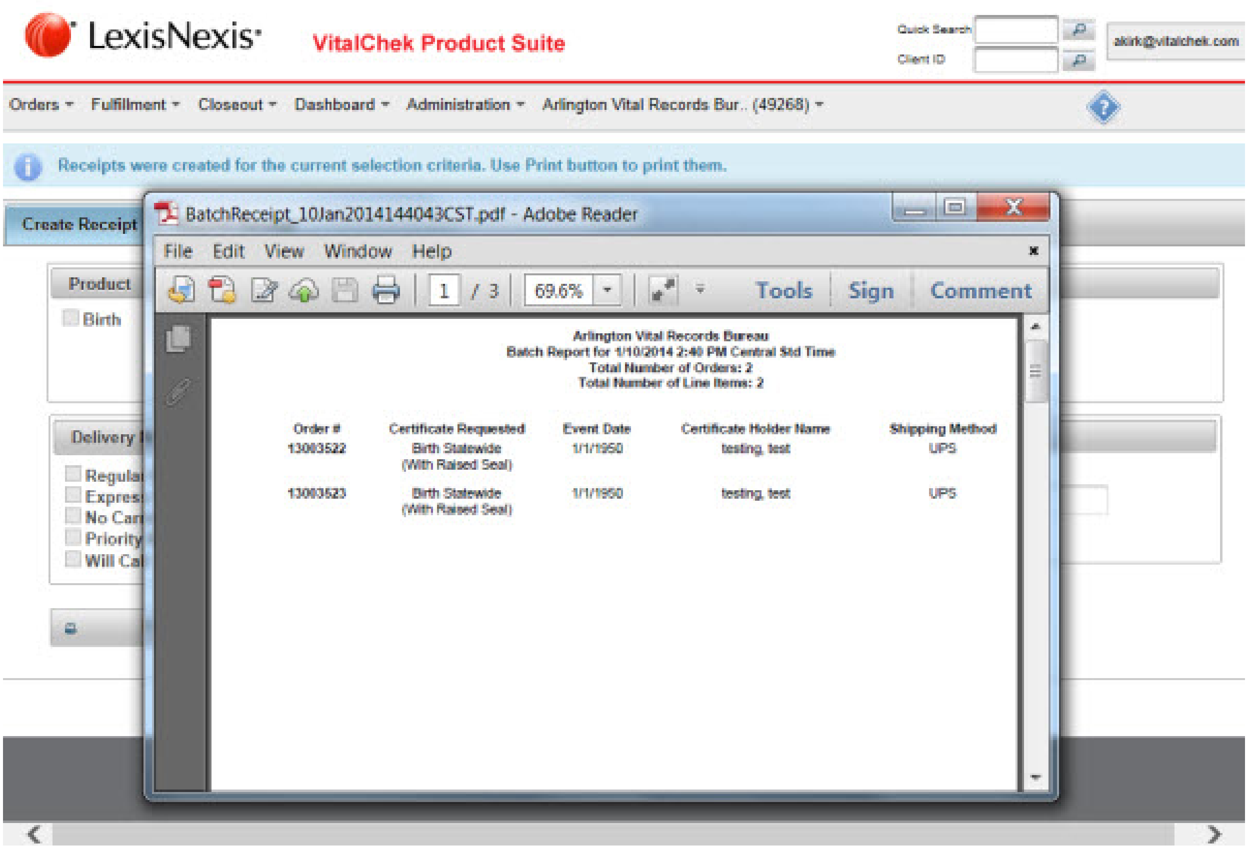
Step 7 **Batch Receipts** are created and confirmation message displays, **Create Receipts** button is replaced with **Print** button.



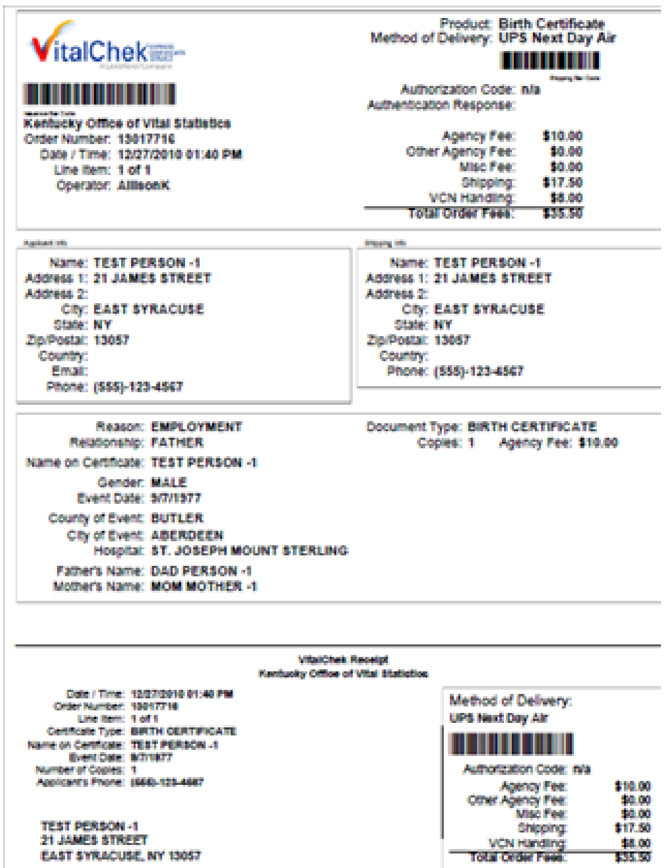
Click **Print** button to display receipts in .Pdf window

Step Receipts are displayed in a .Pdf

8

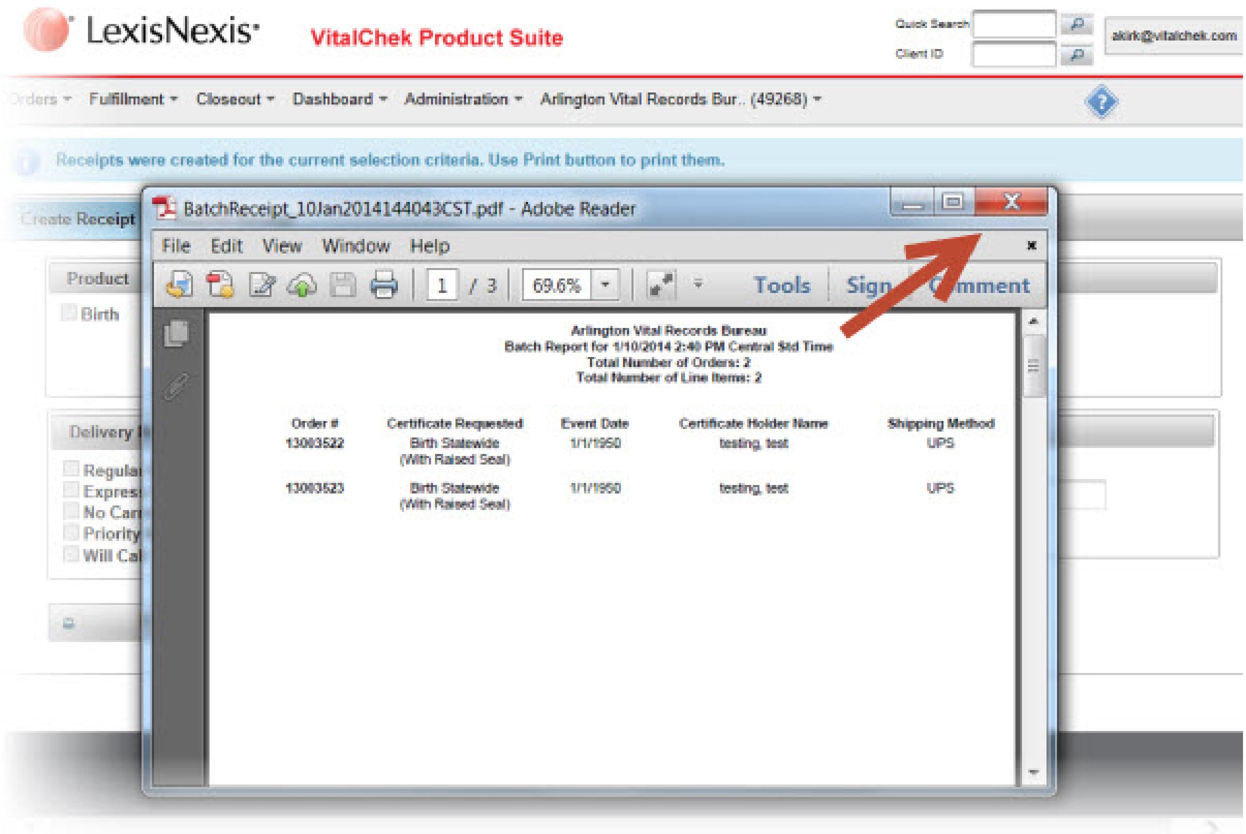


Scroll to view entire receipt

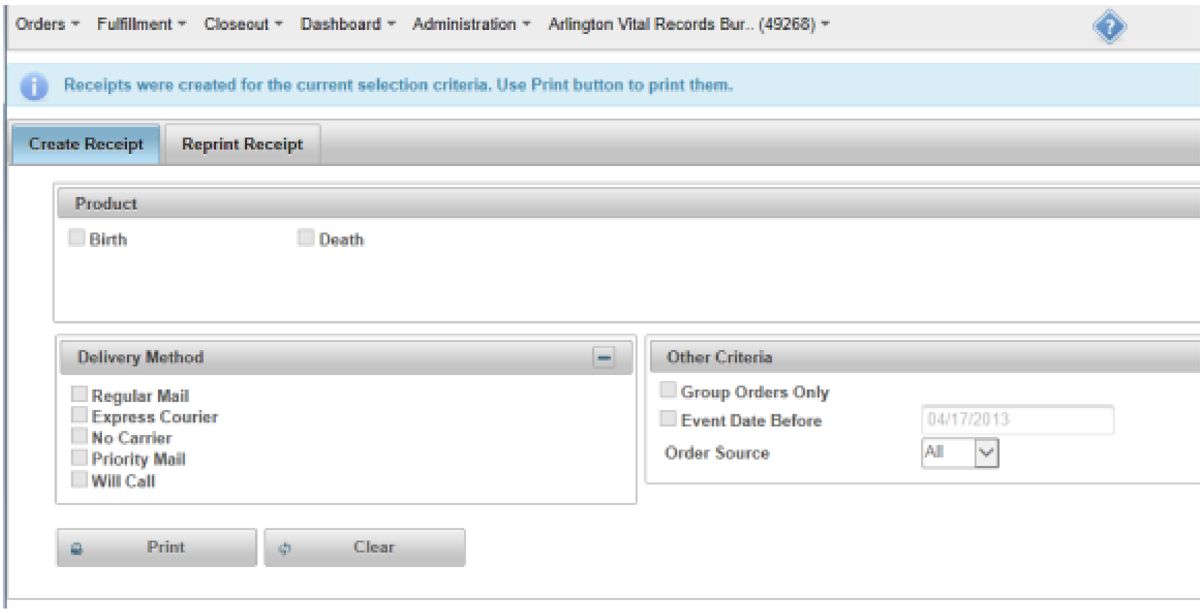


Step 9 Click Print button to print receipts

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



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



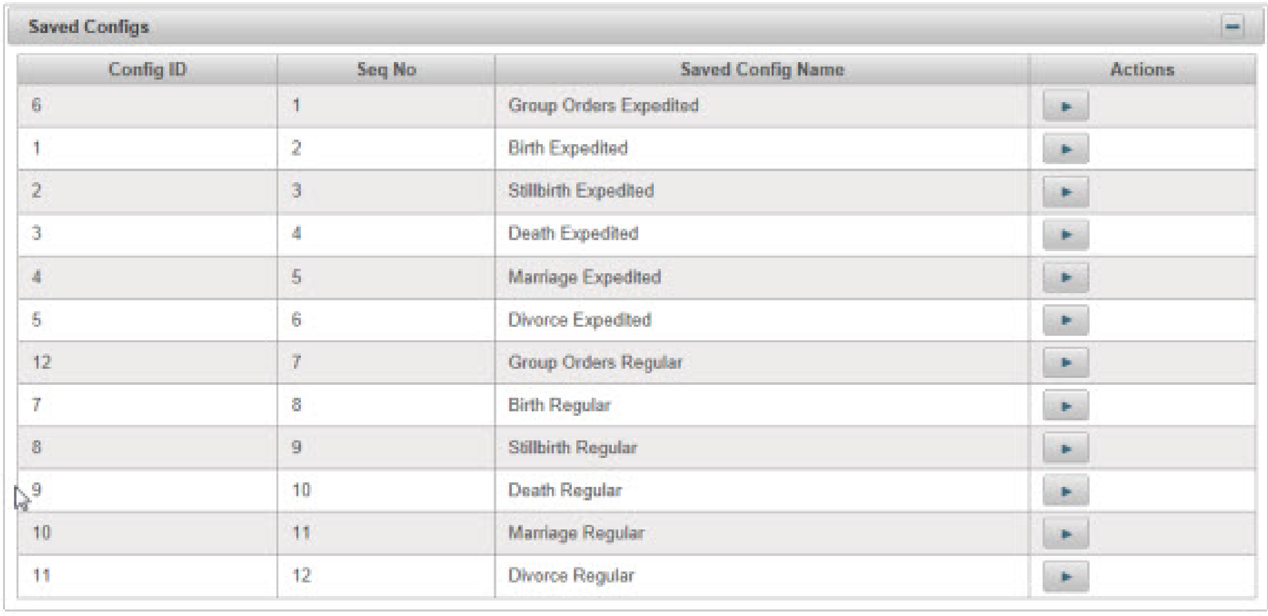
Note - If receipt criteria was selected (step 2, 3 or 4 above) - to print additional receipts with new criteria/selections - click the ***Clear*** *button to clear current selections and then repeat steps 6 - 10. Previous selections will remained checked until the* ***Clear*** *button is* *clicked.*

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.

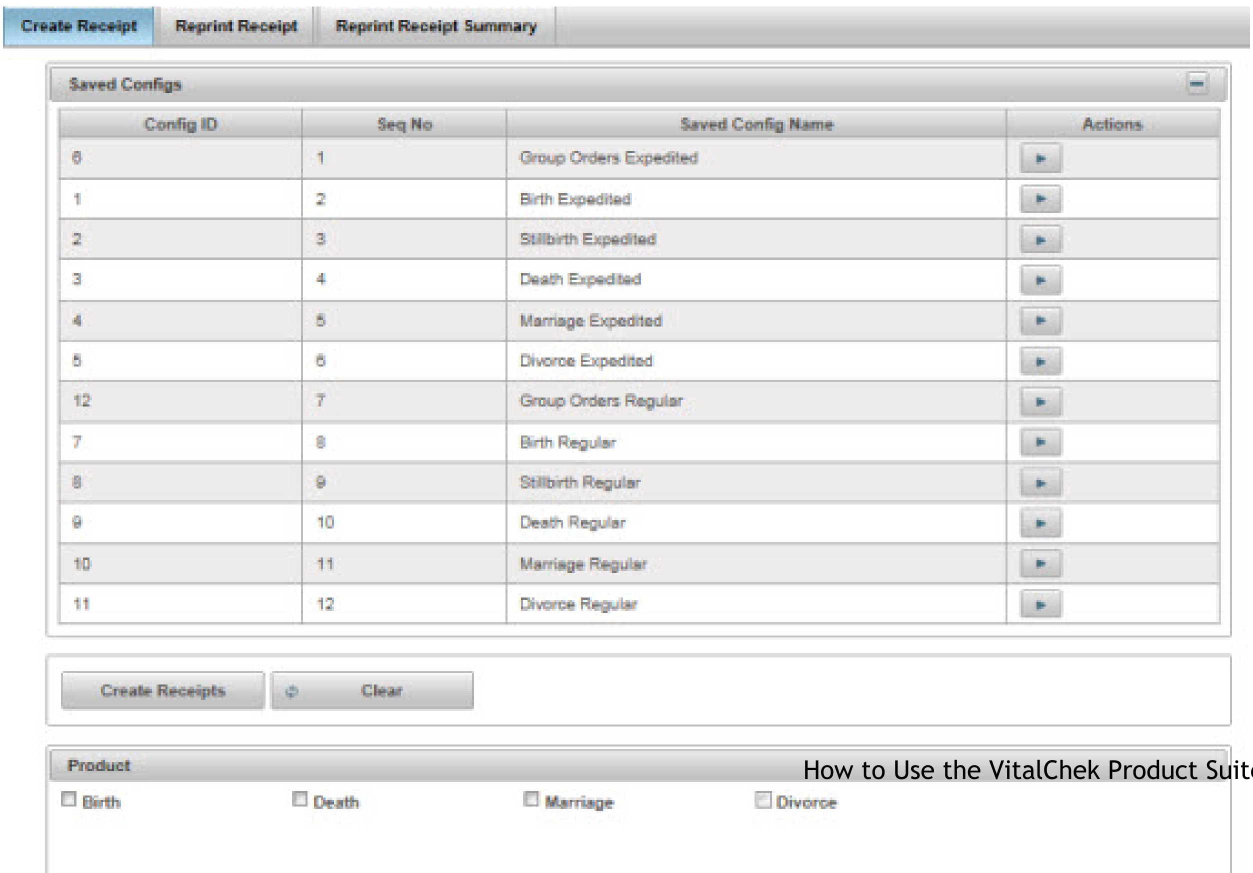
Users must have a role of **Supervisor** or **Manager** to be able to view and access **Batch Receipts.**



Saved Configs

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



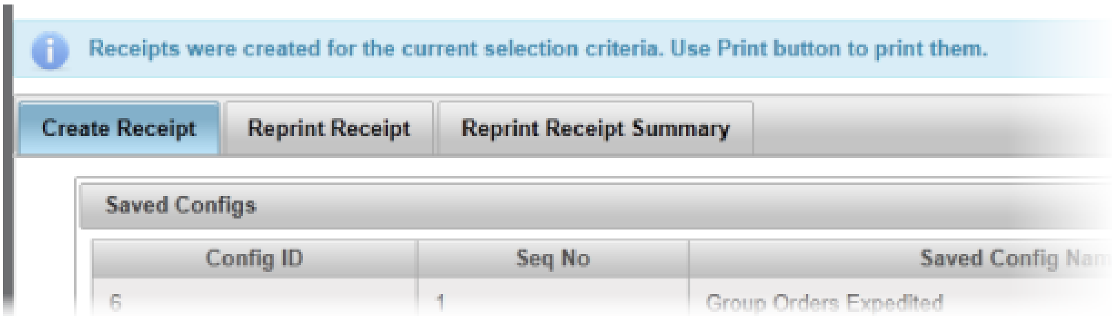
Config ID	Seq No	Saved Config Name	Actions
6	1	Group Orders Expedited	►
1	2	Birth Expedited	►
2	3	Stillbirth Expedited	►
3	4	Death Expedited	►
4	5	Marriage Expedited	►
5	6	Divorce Expedited	►
12	7	Group Orders Regular	►
7	8	Birth Regular	►
8	9	Stillbirth Regular	►
9	10	Death Regular	►
10	11	Marriage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

Step 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

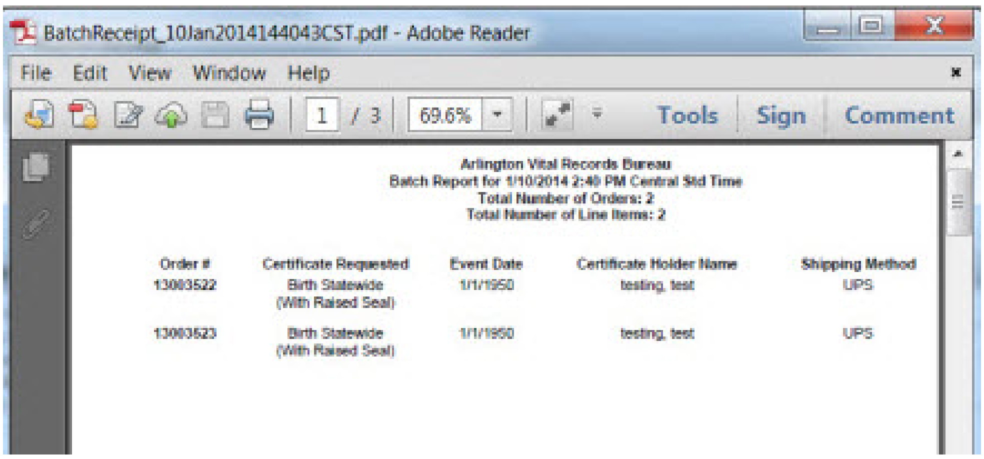


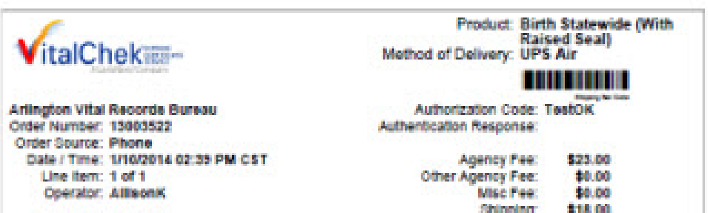
Click the **Create Receipts** button to display the selected receipts

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





Step 4 Print Batch Receipts by clicking on printer icon

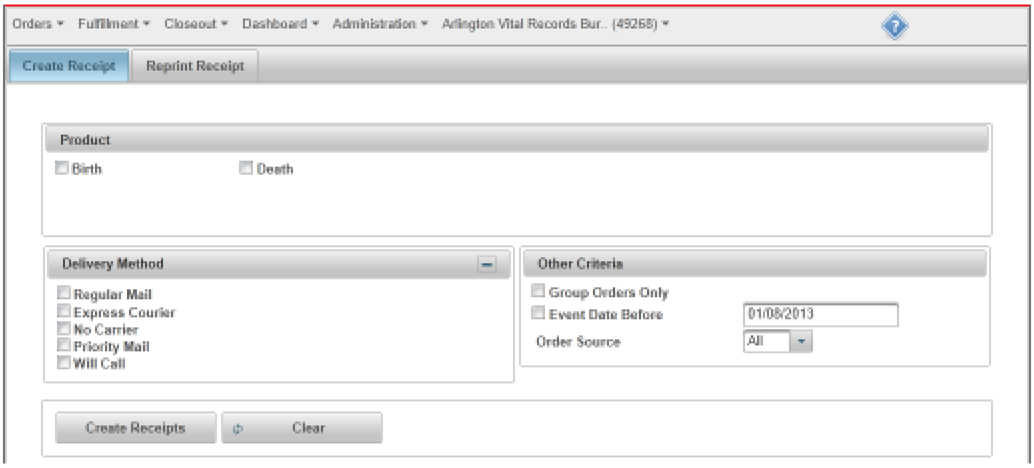
5 How to Reprint a Batch Receipt

How to Reprint a Batch Receipt

Receipts that have been previously batched and printed can be reprinted using the **Reprint Receipt** tab.

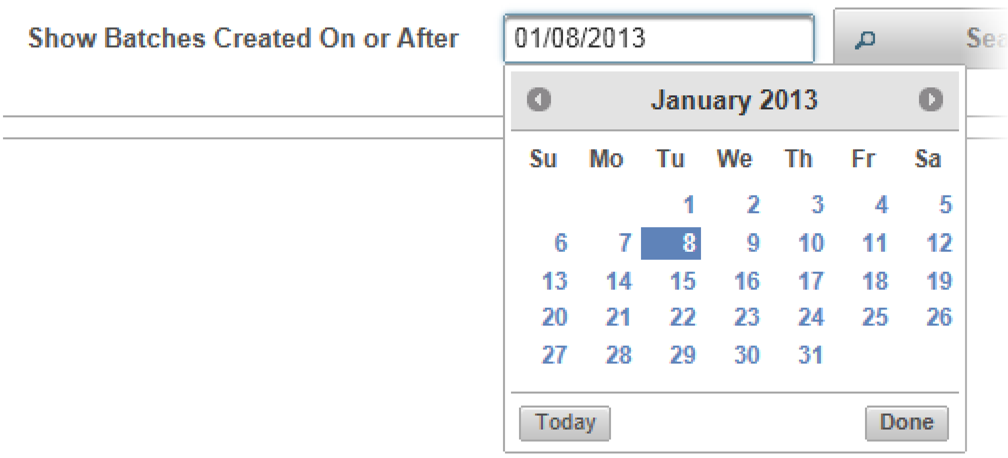
Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Batch Receipts.**

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

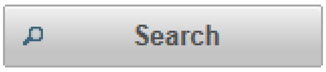


Step 2 Click **Reprint Receipt** tab

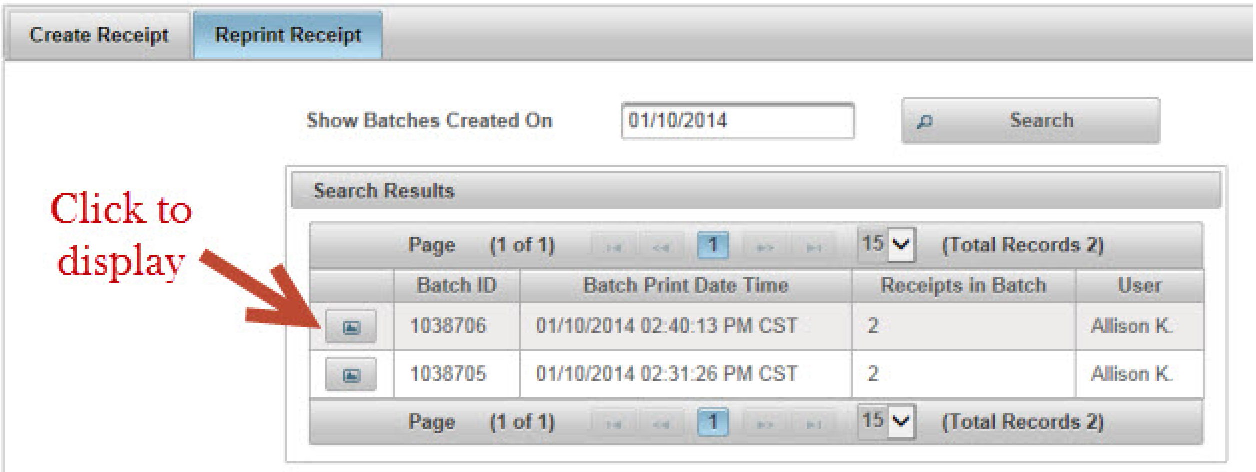
Step 3 Manually enter search date to **Show Batches Created** after that date, or use the calendar icon to select a date



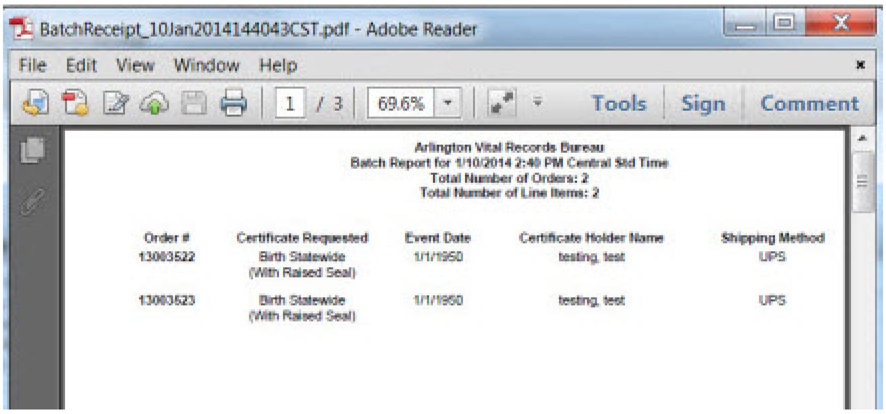
Step 4 Click **Search** button

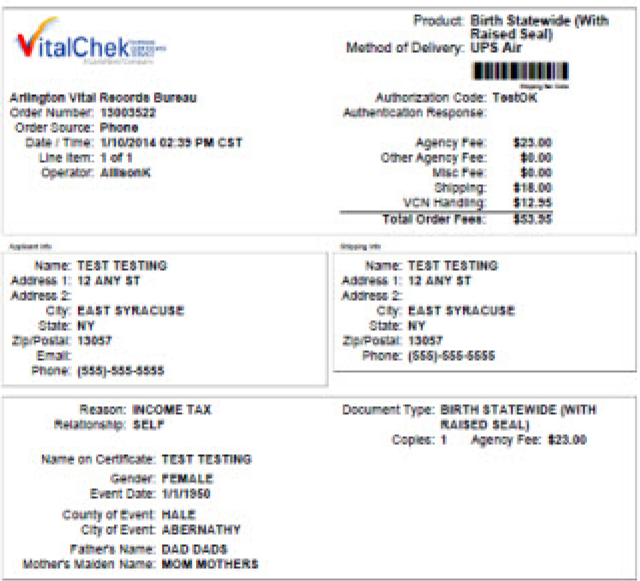


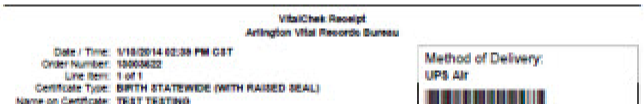
Step 5 Available receipts for the selected date are displayed in the **Search Results** window; click on image icon to display receipts in .pdf



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







Step 4	Reprint Batch Receipt(s) by clicking on printer icon 

6 How to Reprint a Batch Receipt Summary

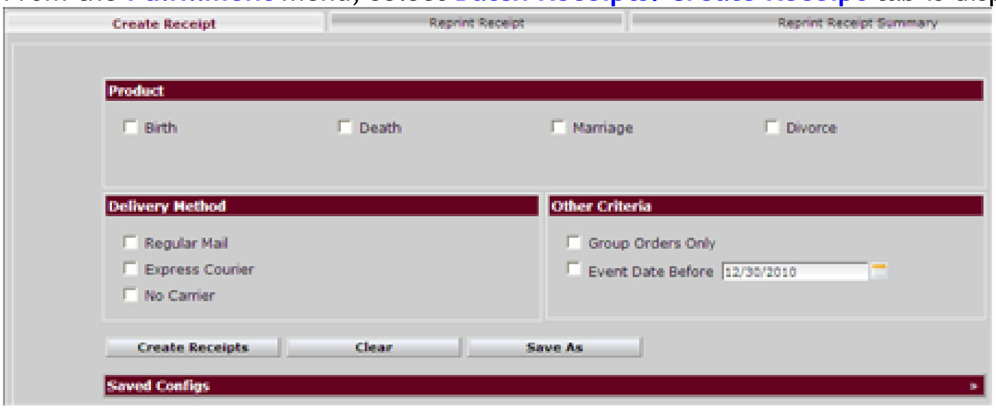
How to Reprint a Batch Receipt Summary

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

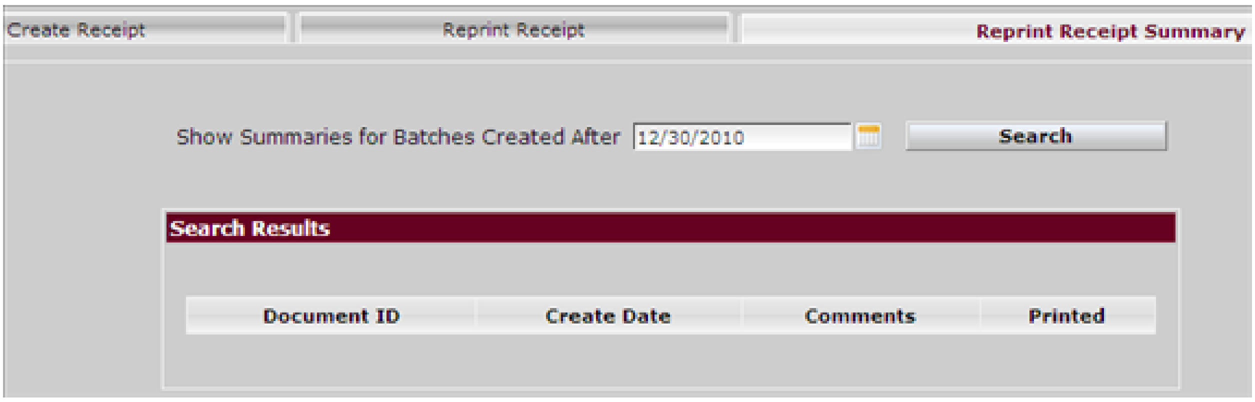
Receipts that have been previously batched and printed can be reprinted using the **Reprint Receipt** tab

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.

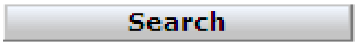


Step 2 Click **Reprint Receipt Summary** tab



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

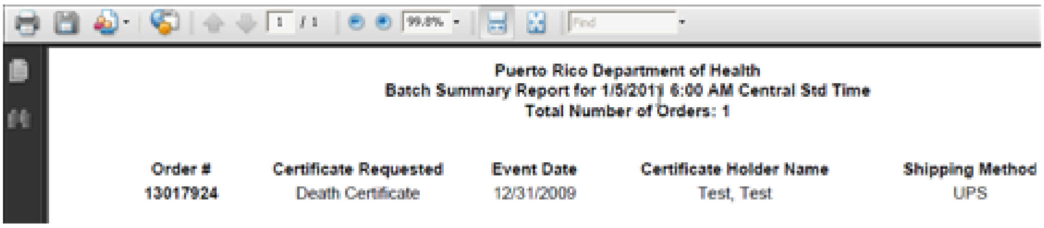
Step 4 Click Search button



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

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)

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***

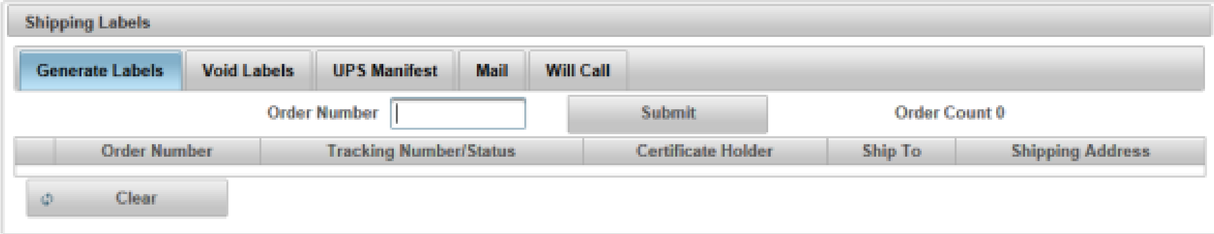
8 How to Generate Shipping Labels

How to Generate Shipping Labels

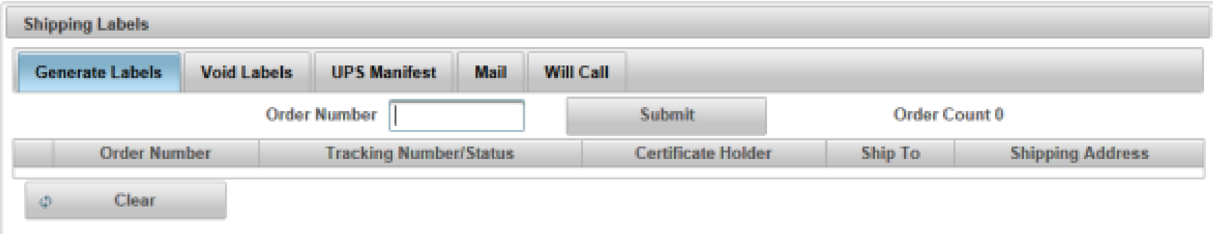
Shipping labels are generated to address and send certificates.

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.*

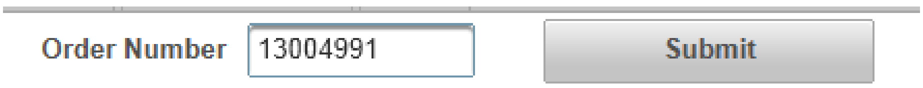


Step 1 From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.

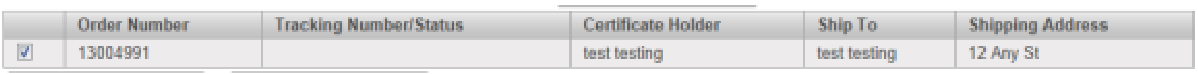


Step 2 Enter **Order Number** and click **Submit** button

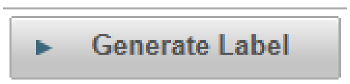
*Note - User can also enter **Order Number** and a plus sign ("+") at the end of the number. Order will automatically submit*



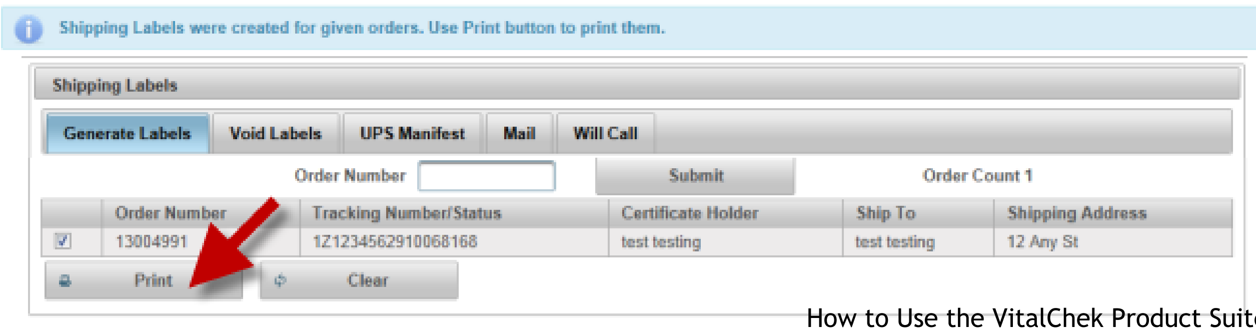
Step 3 Order(s) will be displayed in table. Check box will be checked to generate shipping label



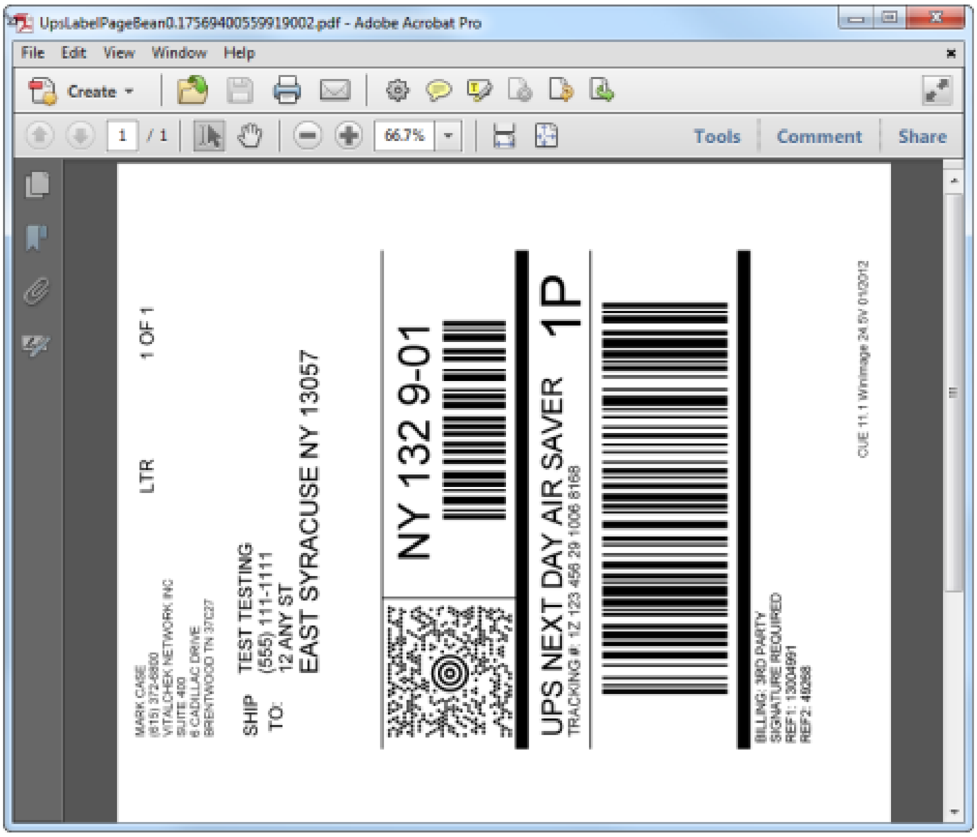
Step 4 Click Generate Labels button



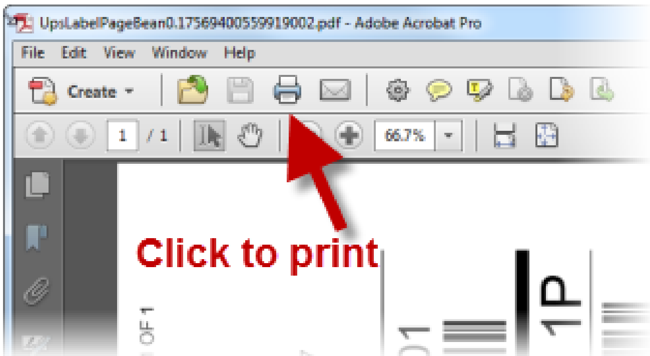
Step 5 Shipping label message is displayed; click **Print** button



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



Step 7 **Click printer icon to print label(s)**

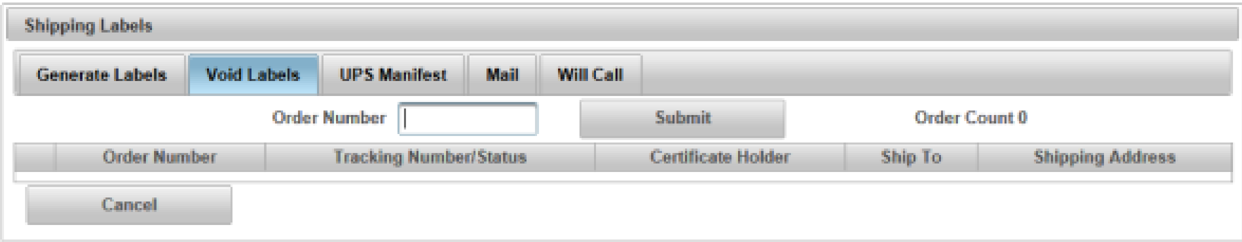


9 How to Void Shipping Labels

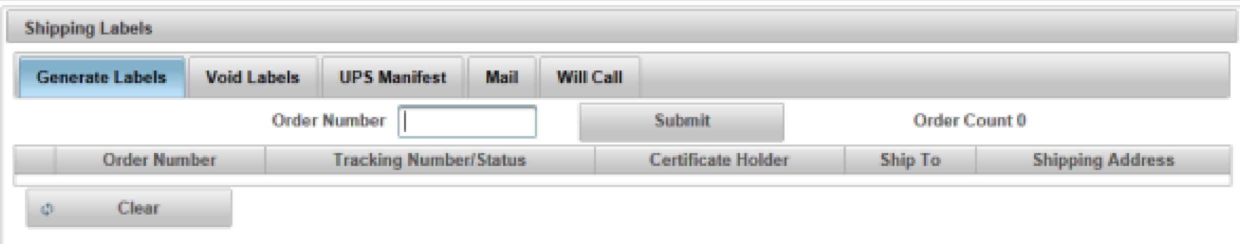
How to Void Shipping Labels

Shipping labels can be voided using the **Void Labels** tab

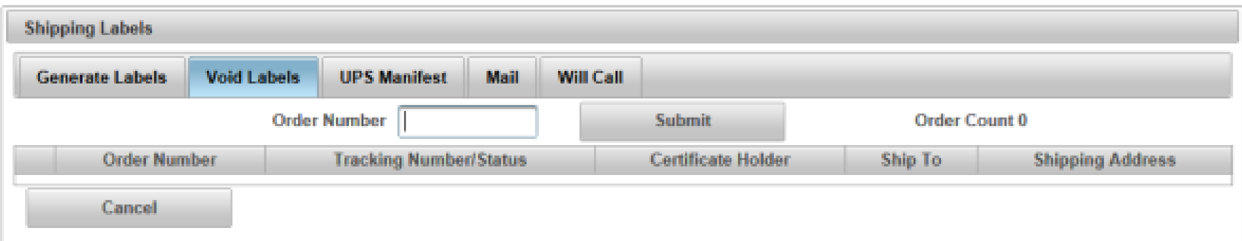
Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions



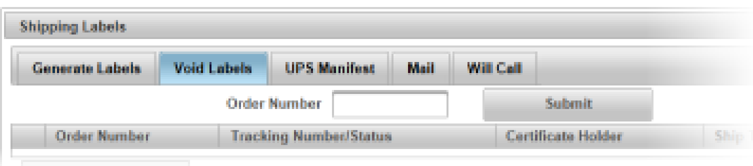
Step 1 From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.



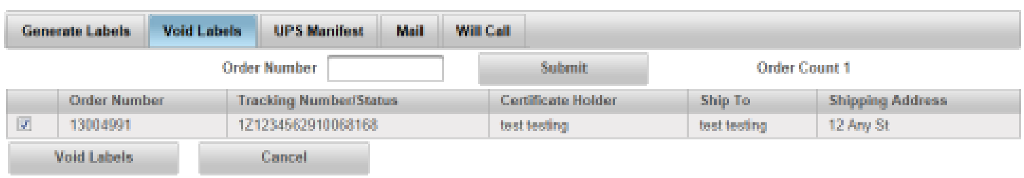
Step 2 Click **Void Labels** tab. Labels can only be voided ***the day the label was generated***, ***prior to the manifest being created***.

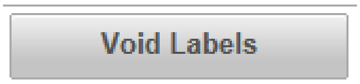


Step 3 Type the **Order Number** and click **Submit** button



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



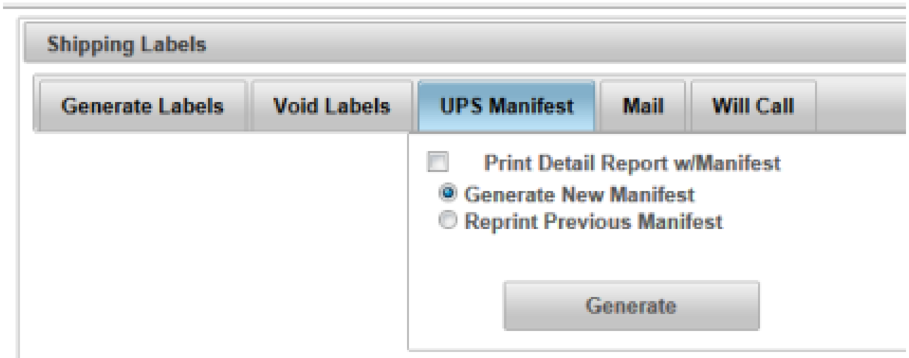
Step 6	Click Void Labels button 
Step 7	Labels voided successfully message appears 

10 How to Print a Detail Report with Manifest

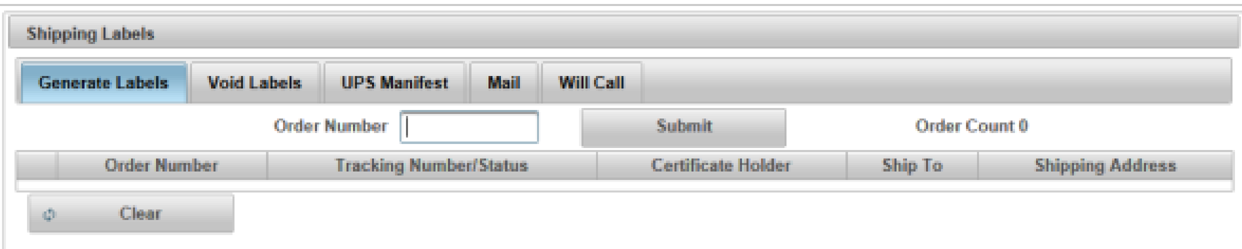
How to Print a Detail Report with a UPS Manifest

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

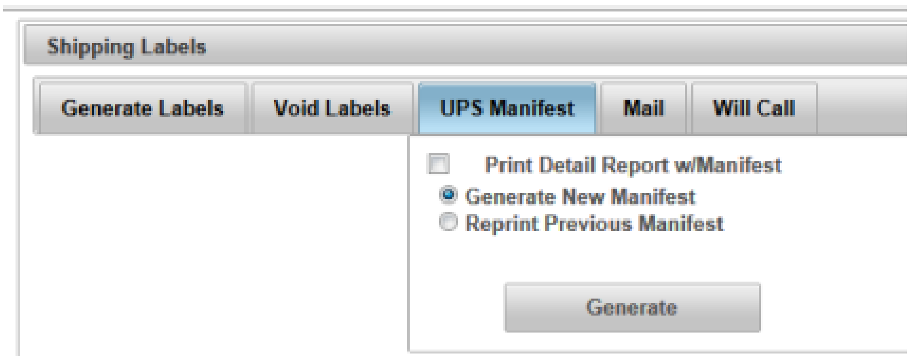
Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.



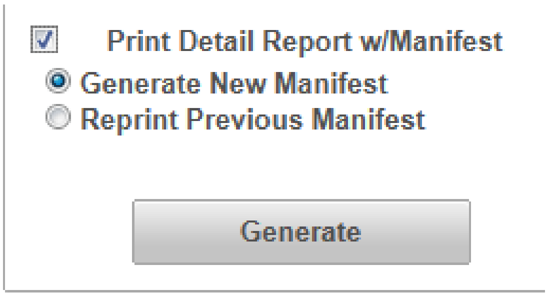
Step 1 From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed



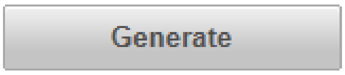
Step 2 Click **UPS Manifest** tab. **Generate New Manifest** screen displays with **Generate New Manifest** button pre-selected



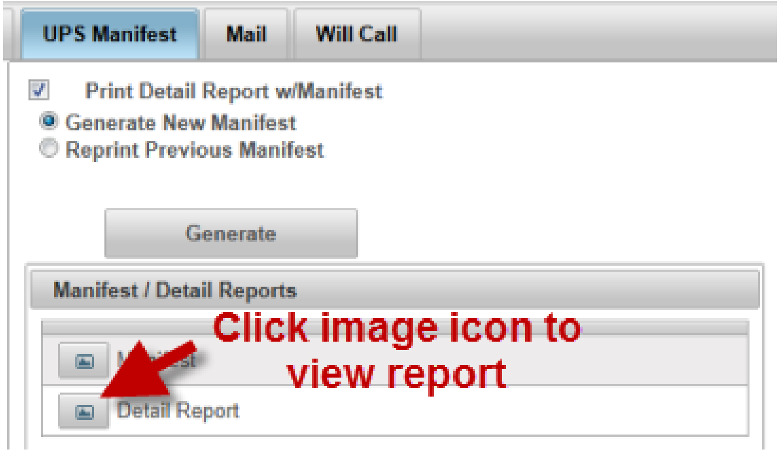
Step 3 Check **Print UPS Detail Report w/Manifest**



Step 4 Click Generate button



Step 5 Manifest/Detail Reports window displays



Step 6 Detail Shipping Report displays in .pdf

Step 7 Click printer icon to print

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

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

VitalChek Shipping Notification

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

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

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

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

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

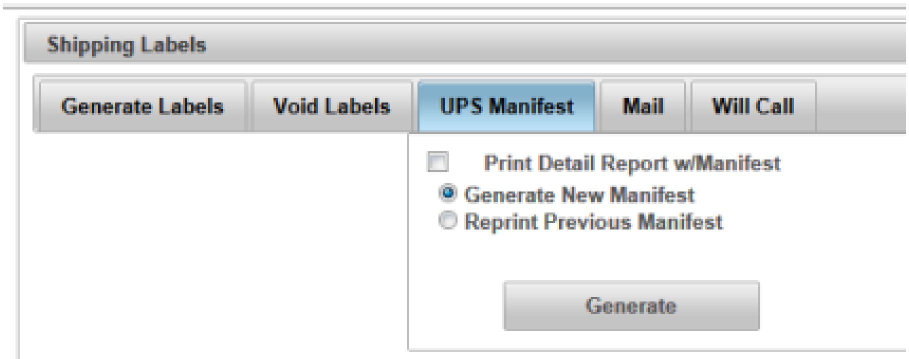
11 How to Generate a New UPS Manifest

How to Generate a New UPS Manifest

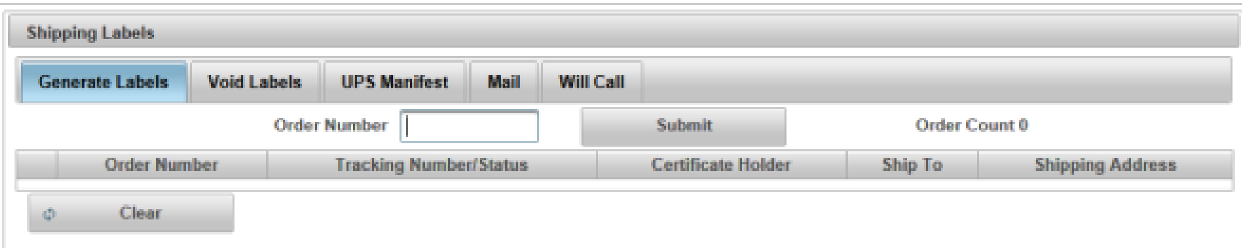
The User can generate and print a **UPS Manifest** from the **UPS Manifest** tab.

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

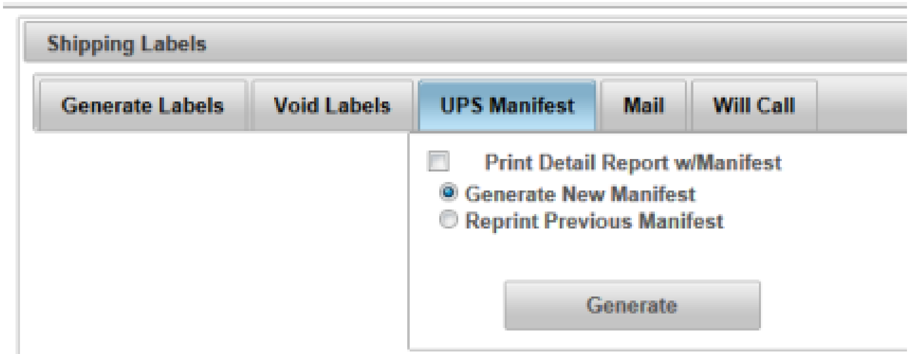
When a manifest is created, an email is sent, notifying the customer their order has been shipped.



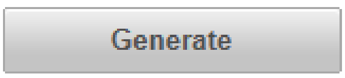
Step 1 From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.



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

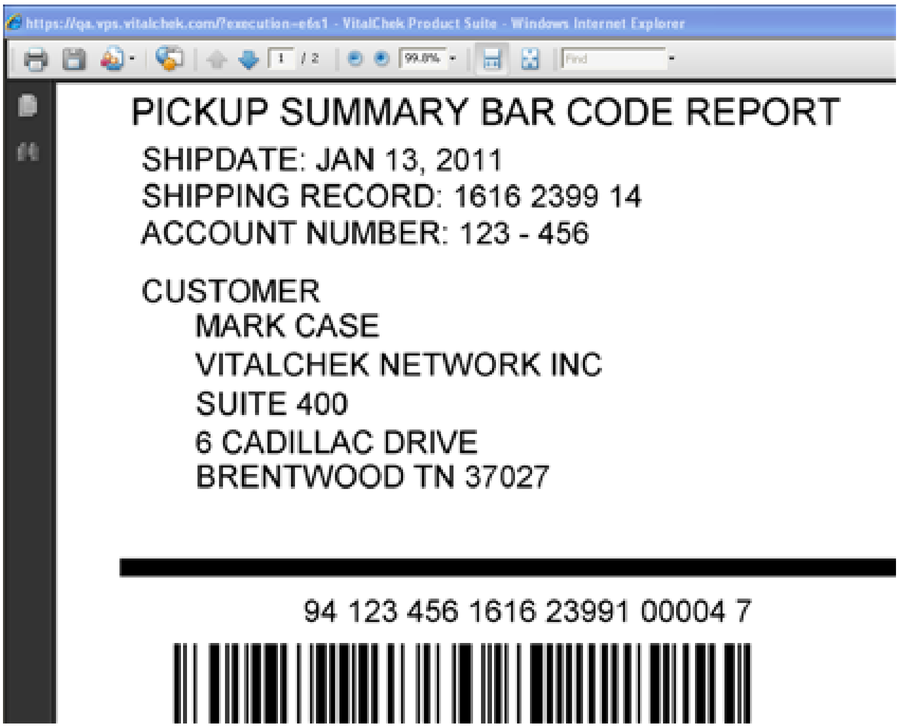


Step 3 Click **Generate** button



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

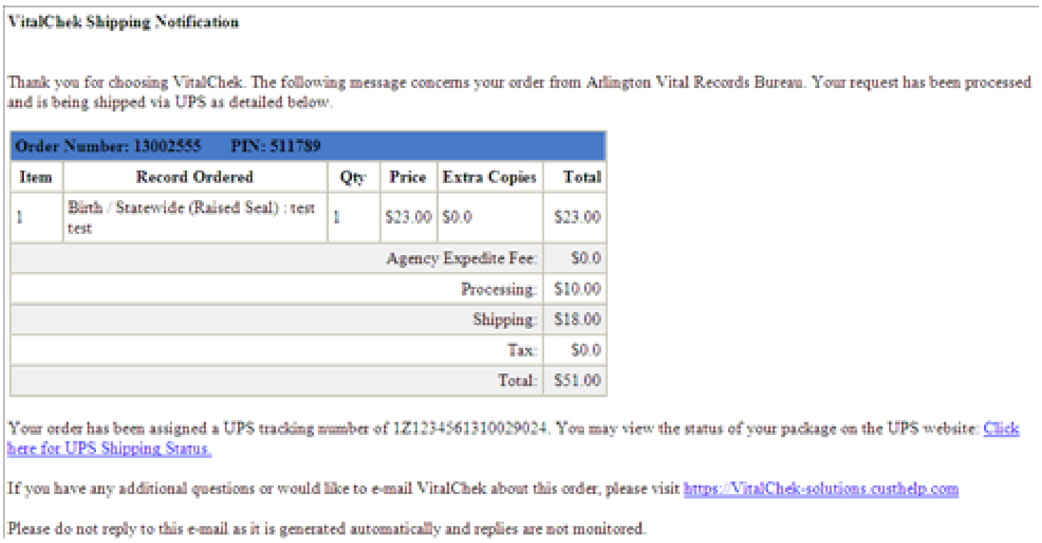
CUSTOMER
MARK CASE
VITALCHEK NETWORK INC
SUITE 400
6 CADILLAC DRIVE
BRENTWOOD TN 37027

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.



VitalChek Shipping Notification

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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

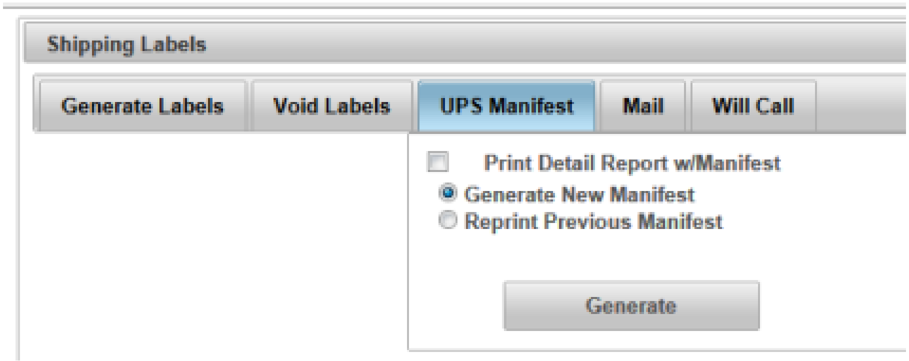
Please do not reply to this e-mail as it is generated automatically and replies are not monitored.

12 How to Reprint a Previous UPS Manifest

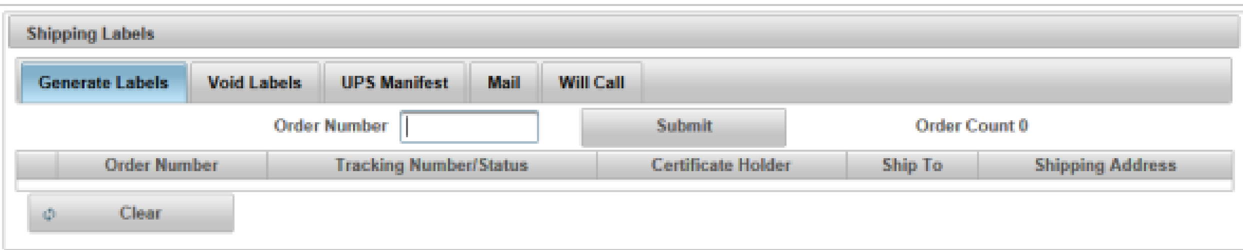
How to Reprint a Previous UPS Manifest

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

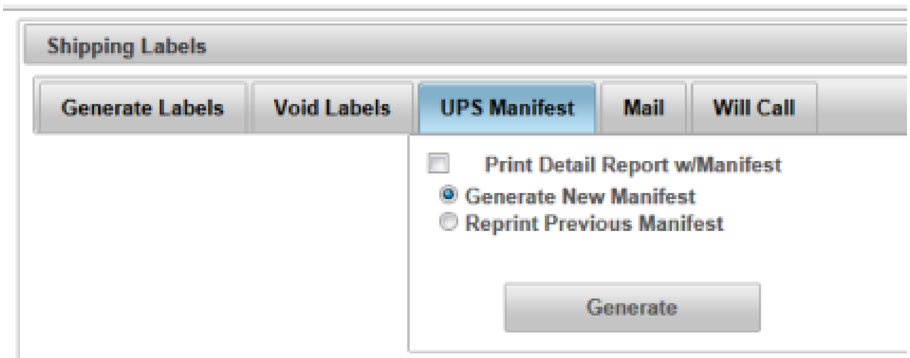
Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions



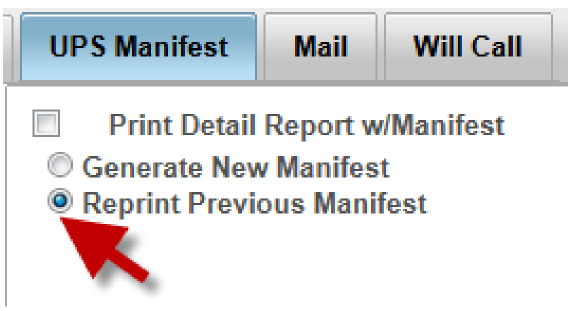
Step 1 From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.



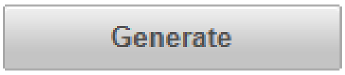
Step 2 Click **UPS Manifest** tab. **Generate New Manifest** screen displays with **Generate New Manifest** button pre-selected.



Step 3 Check **Reprint Previous Manifest** button

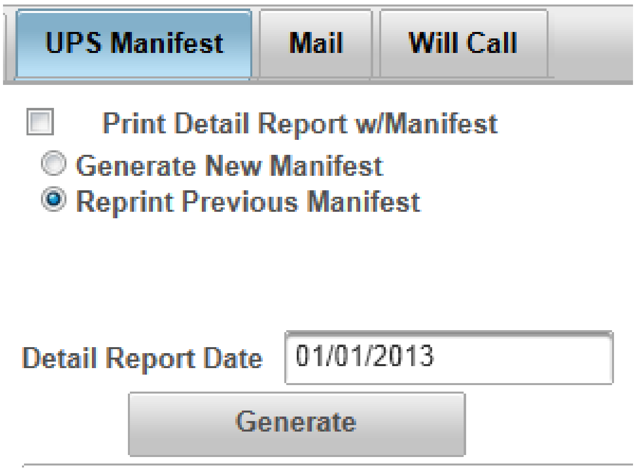


Step 4 Click **Generate** button



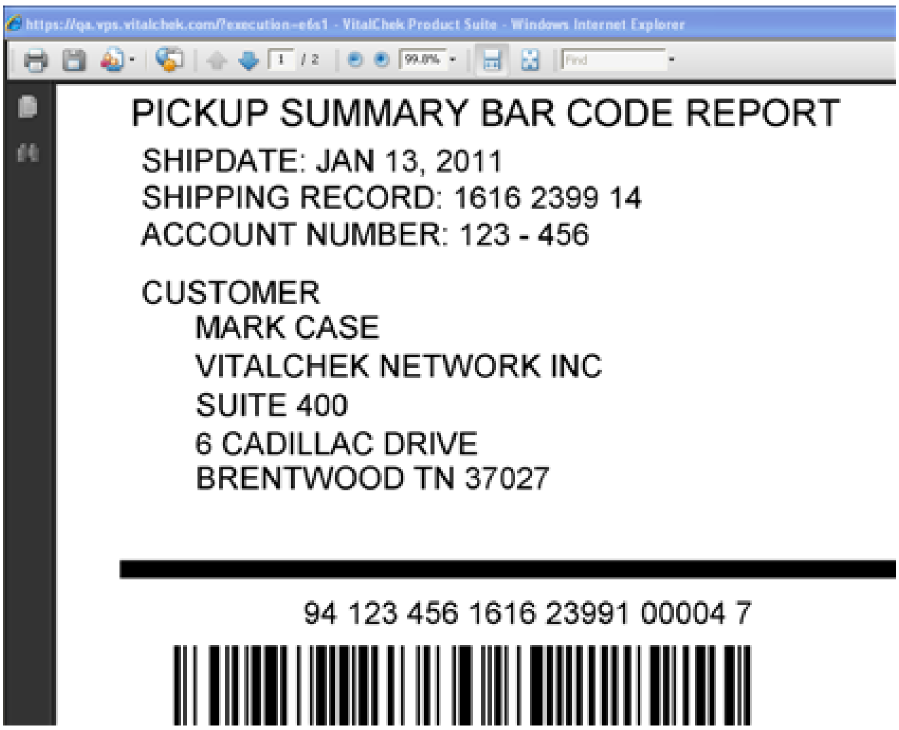
Step 5 Reprint Previous Manifest box displays defaulted to current date.

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



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

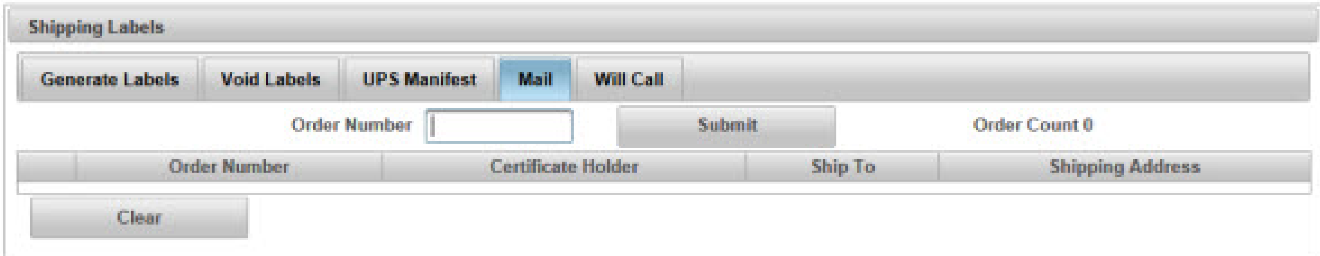
Step 8	Click printer icon to print 

13 How to Process Regular Mail

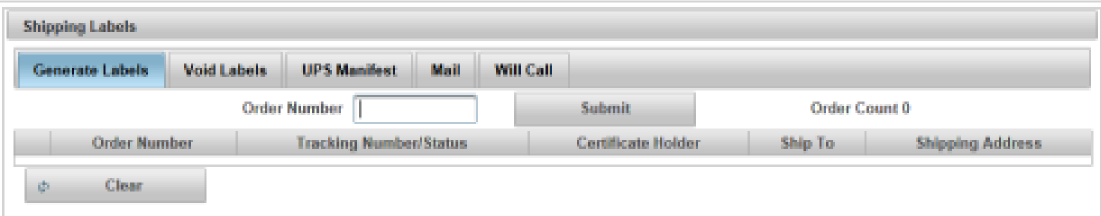
How to Process Regular Mail

Regular mail orders (United States Postal Service/USPS) are processed through the **Mail** tab.

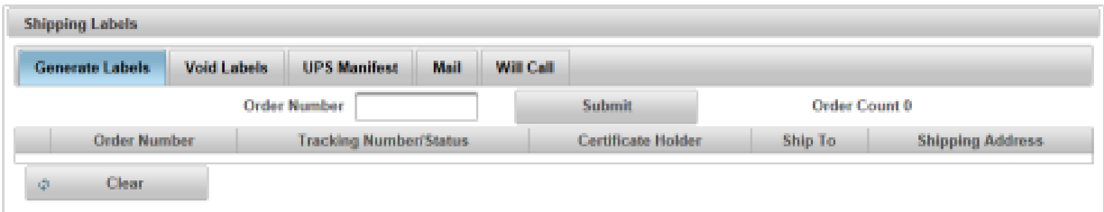
Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.



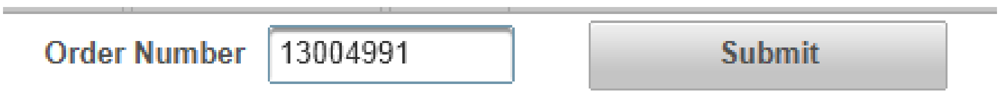
Step 1 From the **Fulfillment** menu, select **Shipping Labels. Generate Labels** tab is displayed.



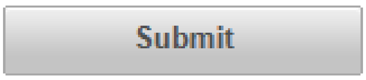
Step 2 Click **Mail** tab to display **Mail** screen



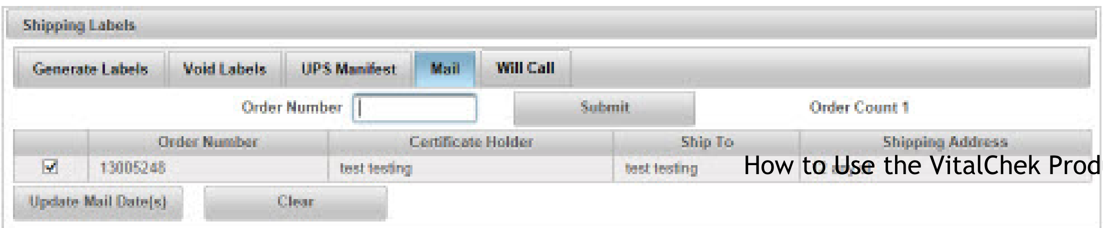
Step 3 Enter **Order Number**



Step 4 Click **Submit** button



Step 5 Order information is displayed



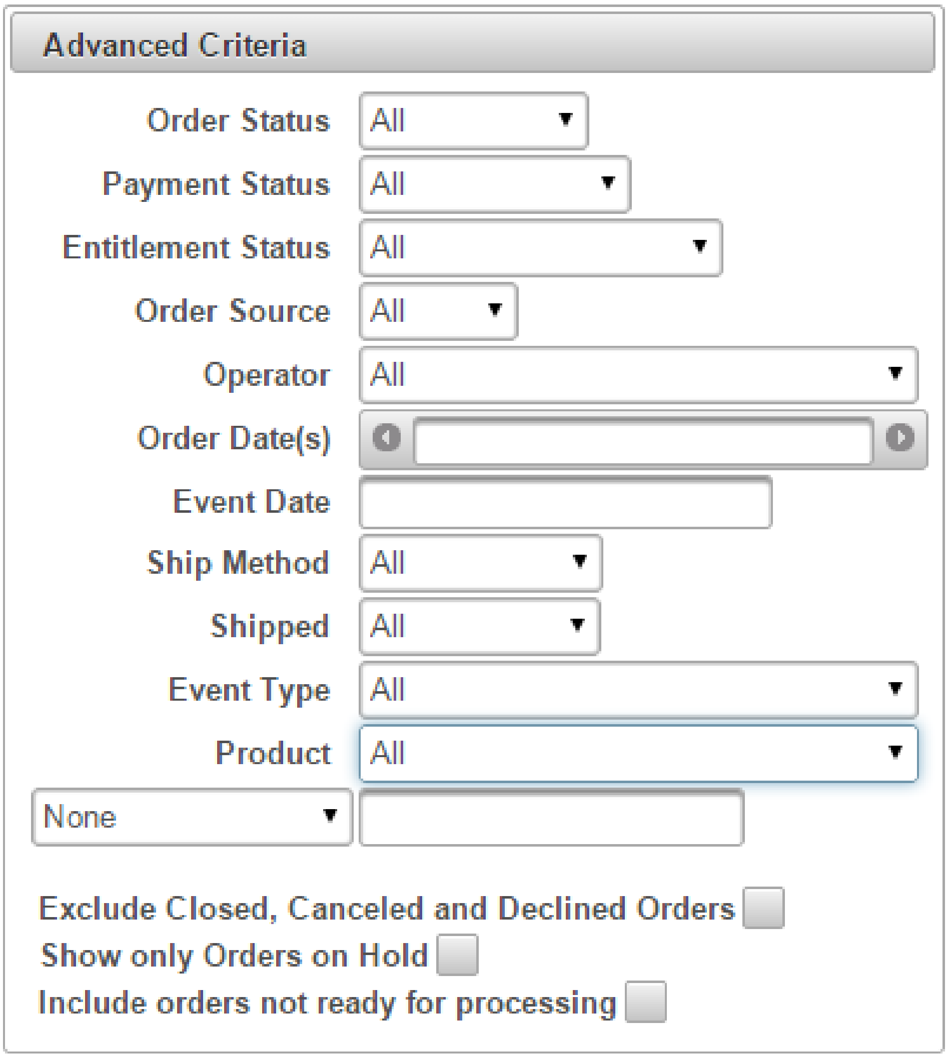
Step 6 Click **Update Mail Date(s)** button.

Step 7 Confirmation message displays

14 How to Search for Orders Using Advanced Criteria Order Search

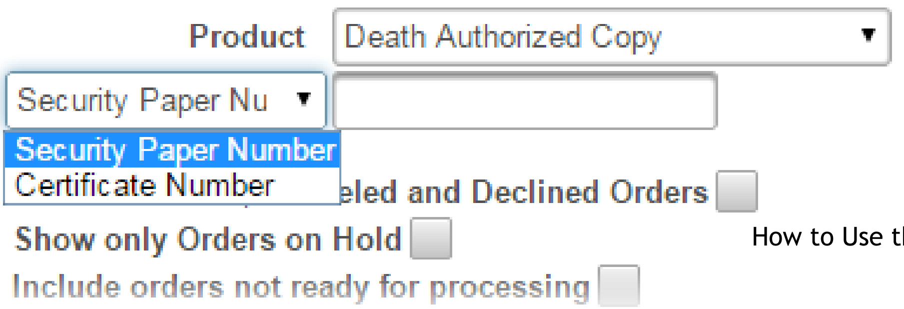
How to Search for Orders Using Advanced Criteria Order Search	Orders may be searched using **Advanced Search Criteria.** **Advanced Criteria** can only be used when at least one type of other search criteria is entered

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

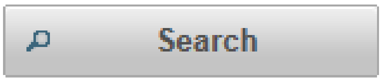


Note - to search by Custom Fields:

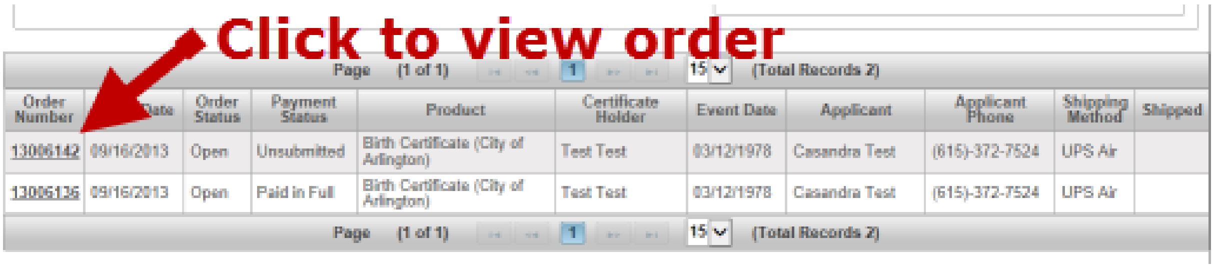
1. *Select the Product*
2. *Select custom field from drop down*
3. *Enter search criteria in search field*



Step 2 Click **Search** button



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



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	

Step 4 Click on highlighted **Order Number** to view order in **Order Details** screen

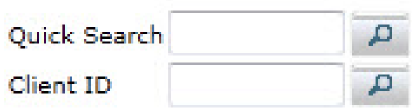
Note Search results can be exported to excel by clicking the **Export** button.

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

15 How to Use Quick Search

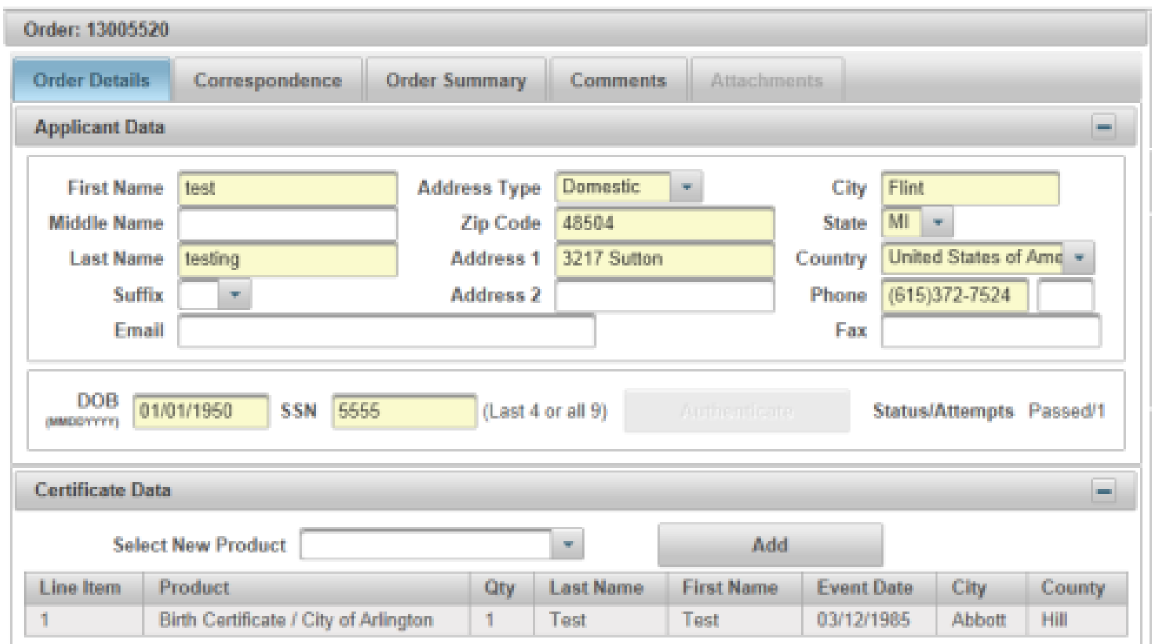
Quick Search Allows orders to be searched by the order number or the Client ID (Agency specific order identification number)

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

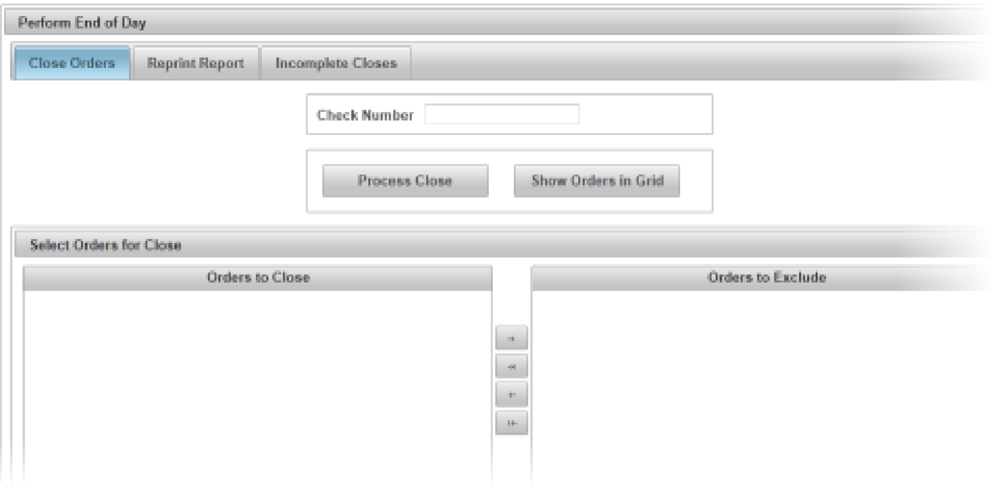
Step 3 Search results are displayed in **Order Details** screen



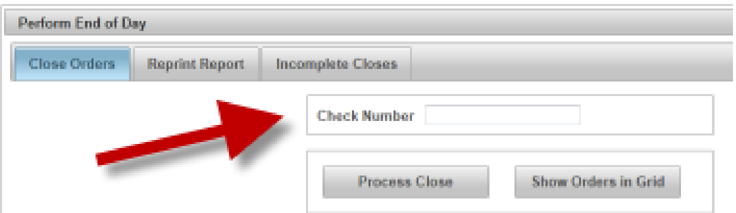
16 How to Close Orders with a Check

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

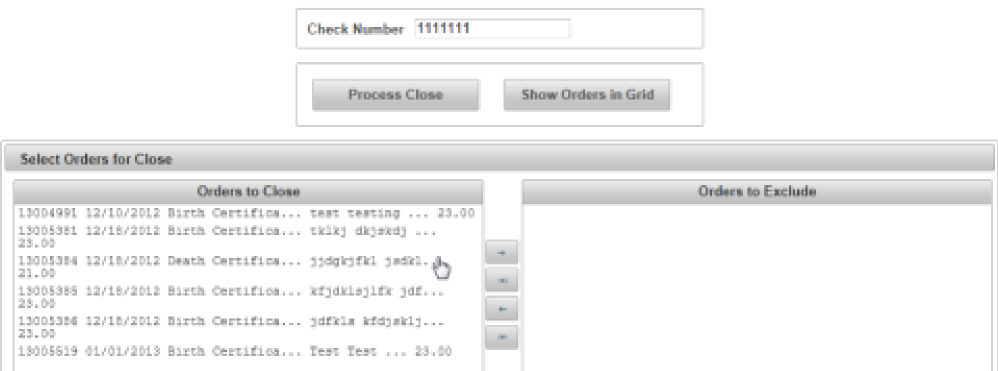


Step 2 Enter **Check Number** from the pre printed check paper



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



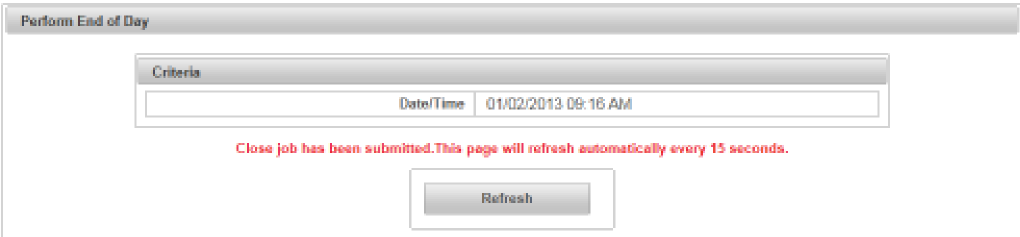
Note - To exclude order(s) from the close:

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*

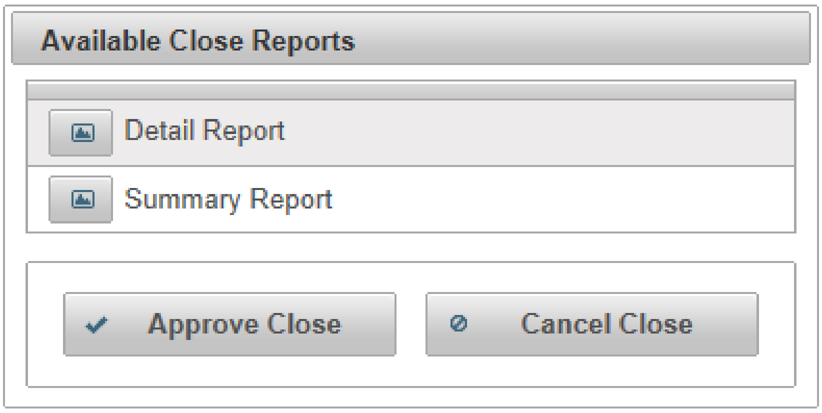
Note - To move multiple orders - click & hold the Control button while clicking the orders to be moved; this will allow the user to select multiple orders at one time

Step 5 Click Process Close button

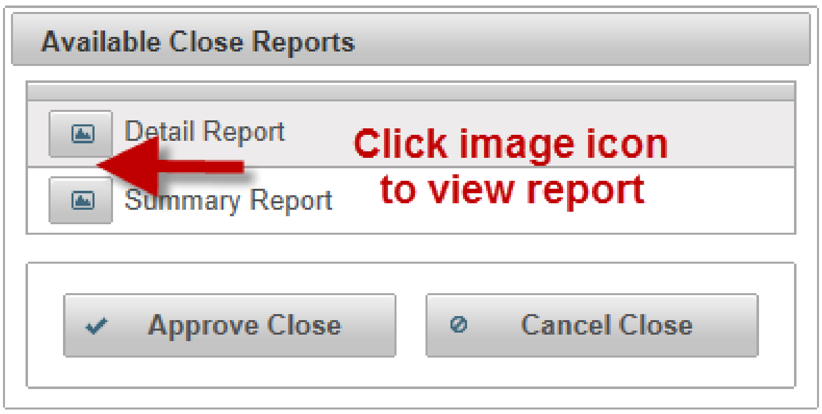
Step 6 Close job report screen appears while close is processing



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

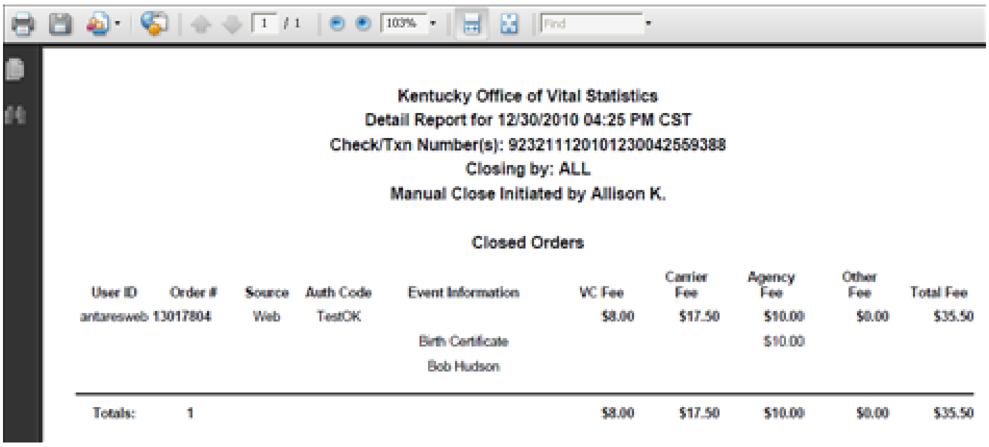


Step 8 Click **Report** link to view report required



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

Detail Report:

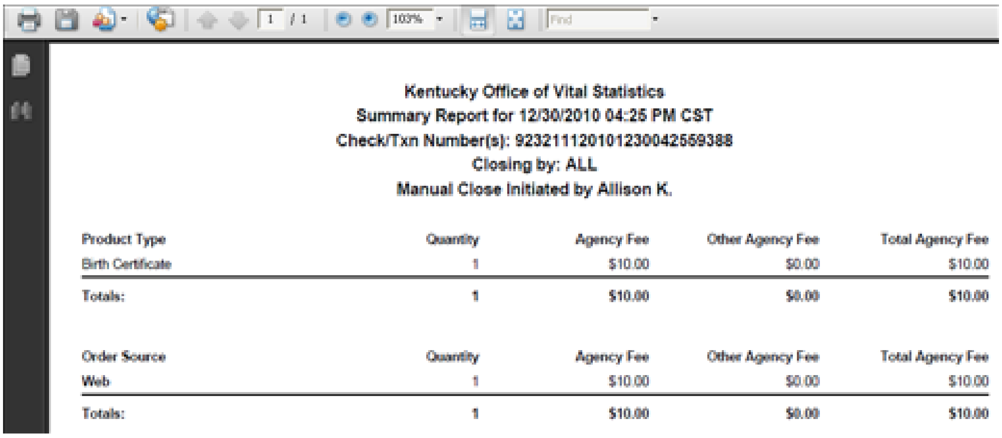


Kentucky Office of Vital Statistics
Detail Report for 12/30/2010 04:25 PM CST
Check/Txn Number(s): 923211120101230042559388
Closing by: ALL
Manual Close Initiated by Allison K.

Closed Orders

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

Summary Report:

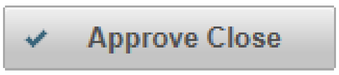


Kentucky Office of Vital Statistics
Summary Report for 12/30/2010 04:25 PM CST
Check/Txn Number(s): 923211120101230042559388
Closing by: ALL
Manual Close Initiated by Allison K.

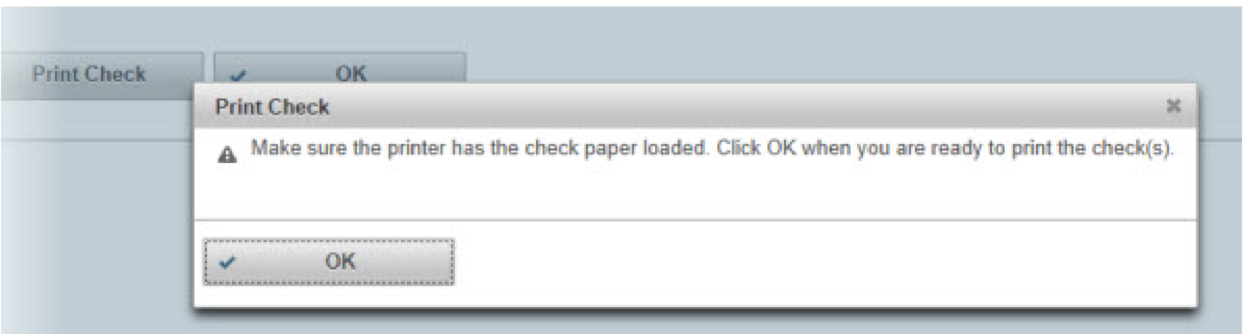
Product Type	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Birth Certificate	1	$10.00	$0.00	$10.00
Totals:	1	$10.00	$0.00	$10.00

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

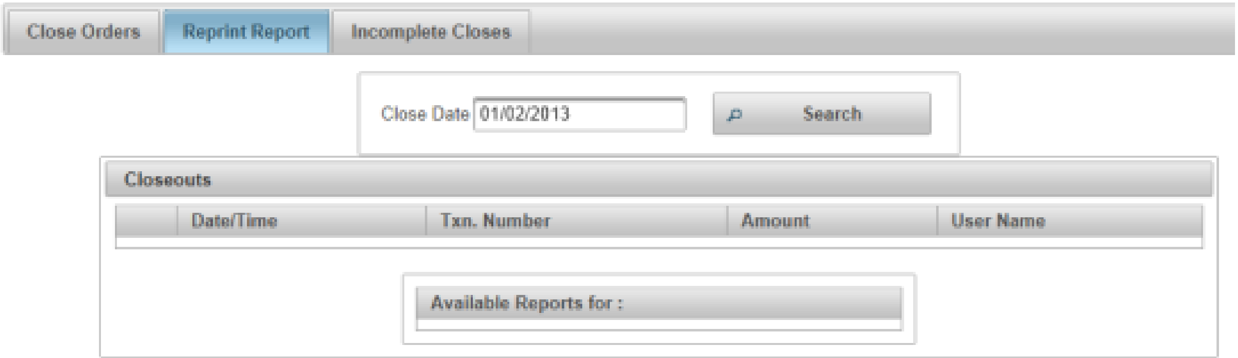
Step 13	Click printer icon to print check on check paper 

17 How to Reprint a Report

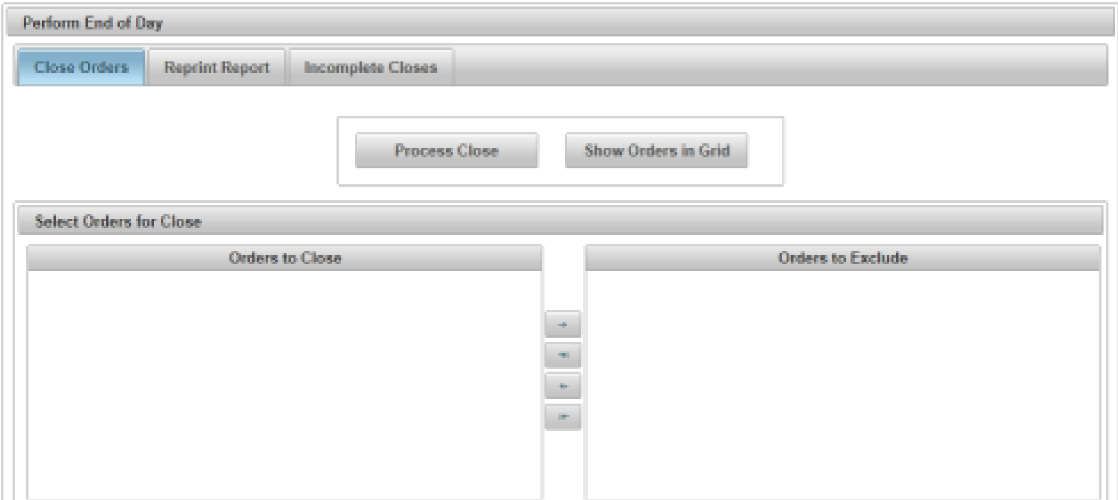
How to Reprint a Close Report

Close reports can be reprinted from the **Reprint Report** tab.

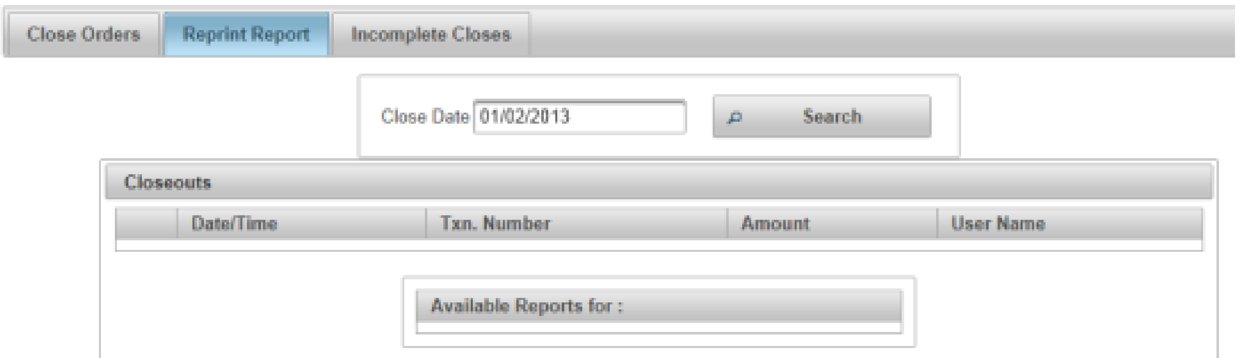
Users must have a role of **Manager** to be able to view and access **Closeout** functions



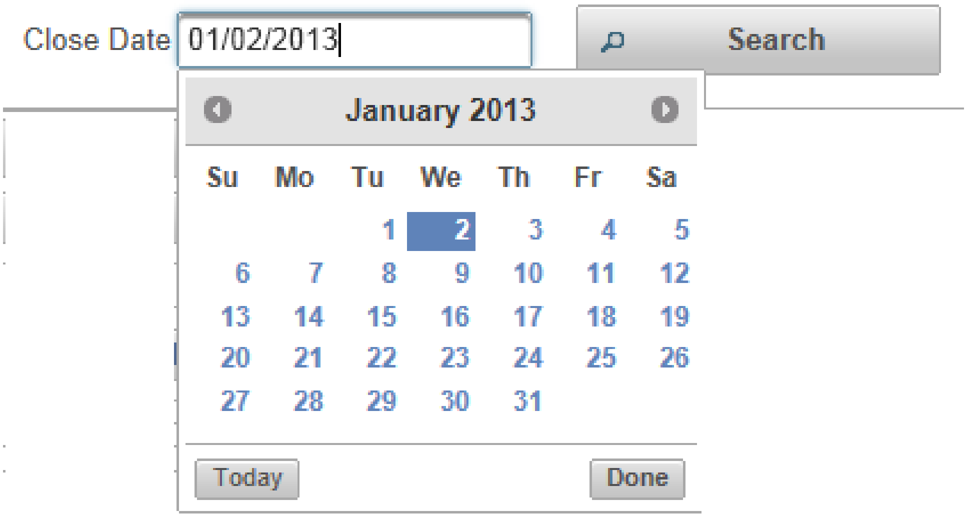
Step 1 From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed



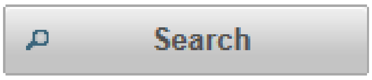
Step 2 Select **Reprint Report** tab to display **Reprint Report** screen



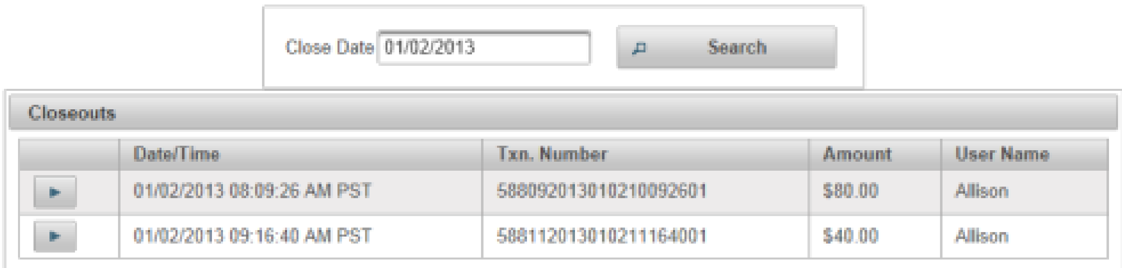
Step 3 **Close Date** defaults to current date, or select another date from calendar icon and click **Done**



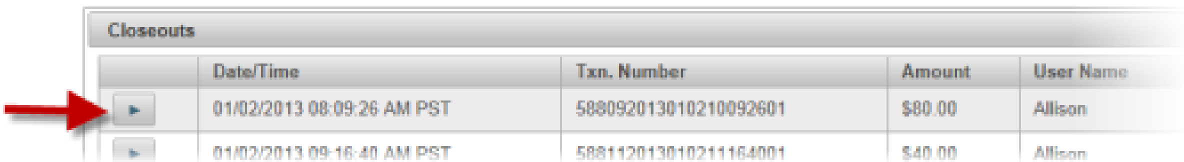
Step 4 Click **Search** button



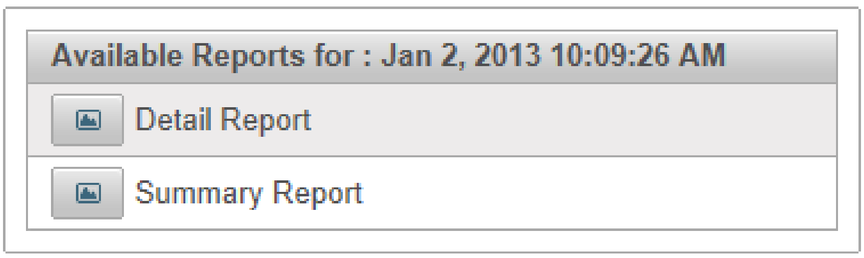
Step 5 Available closeouts from selected date are displayed



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

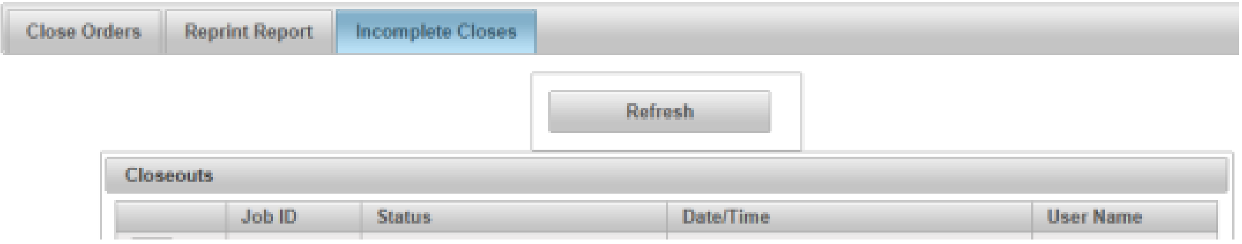
18 How to Process an Incomplete Close

How to Process an Incomplete Close

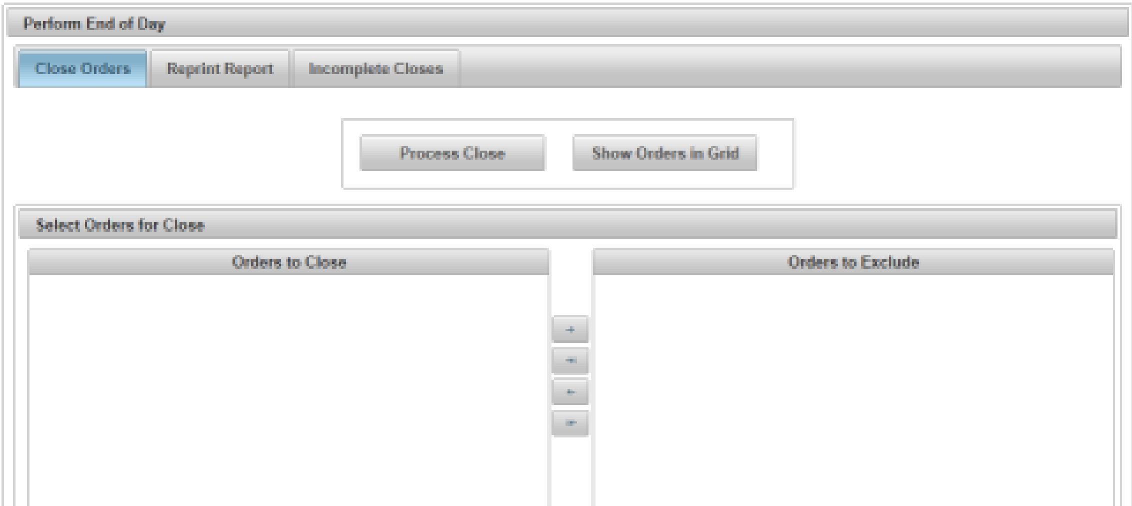
Closes that were interrupted during the closeout process, or Incomplete Closes, can be completed from the Incomplete Closes tab.

Users must have a role of Manager to be able to view and access Closeout functions.

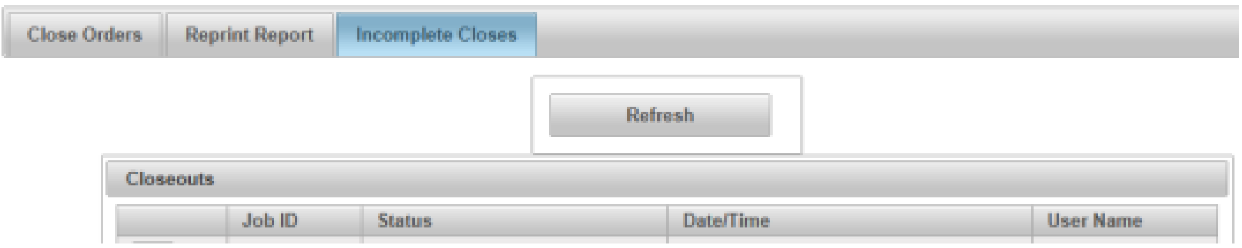
Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.



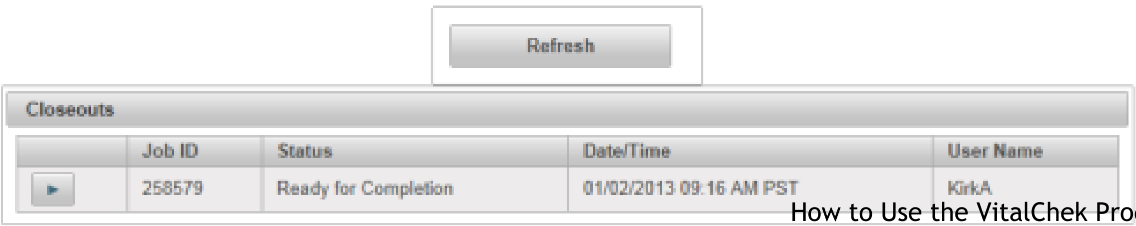
Step 1 From the Closeout menu, select Perform End-of-Day. Close Orders tab is displayed



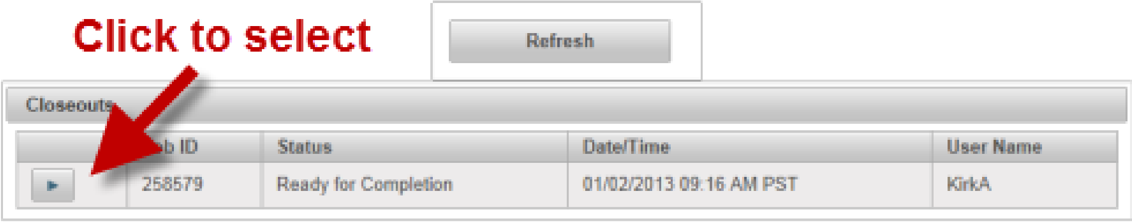
Step 2 Click Incomplete Closes tab



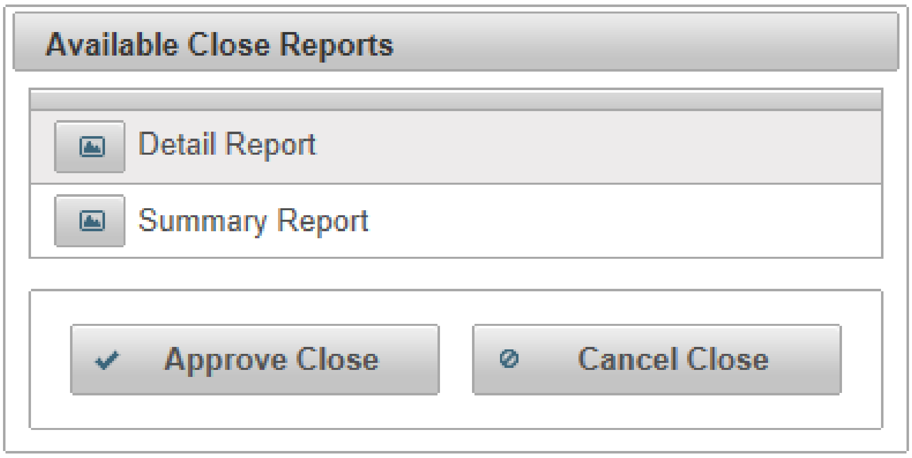
Step 3 Click Refresh button to display incomplete closes in the **Closeout** table



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



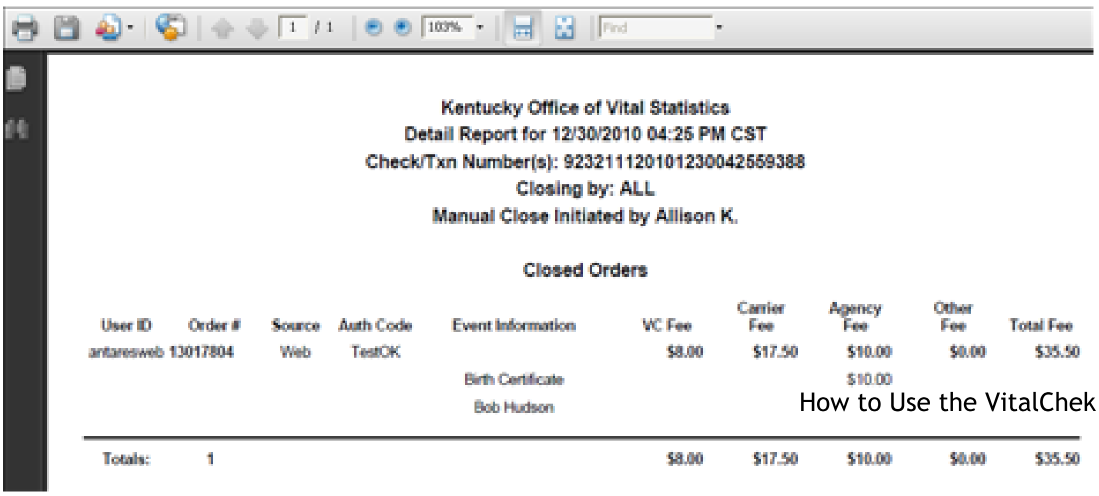
Step 5 The **Available Close Reports** screen is displayed with payment information



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:

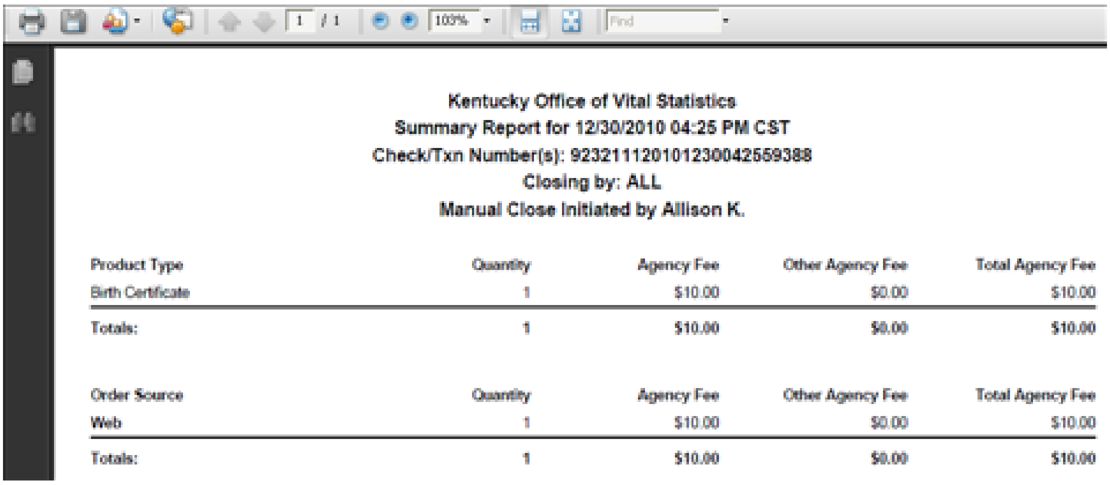


Kentucky Office of Vital Statistics
Detail Report for 12/30/2010 04:25 PM CST
Check/Txn Number(s): 923211120101230042559388
Closing by: ALL
Manual Close Initiated by Allison K.

Closed Orders

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

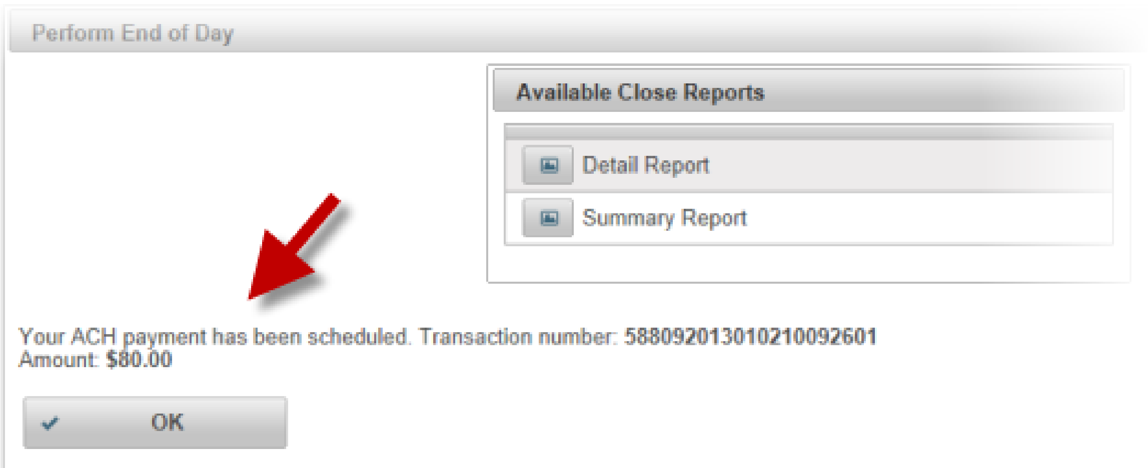
Product Type	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Birth Certificate	1	$10.00	$0.00	$10.00
Totals:	1	$10.00	$0.00	$10.00

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 7 Click Approve Close to complete close process

Step 8 Payment information is displayed and closeout process is complete

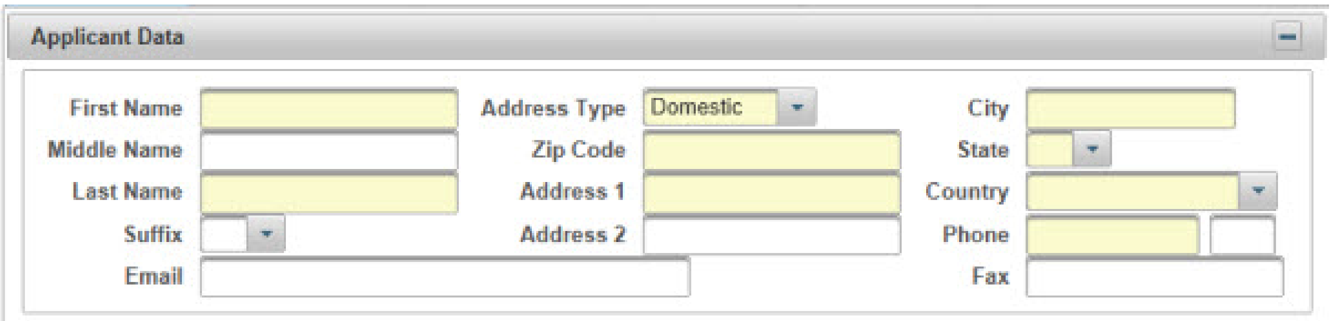
*Note - Agencies that close with a check, see **How to Close Orders with a Check (Section 16)** to complete closeout*



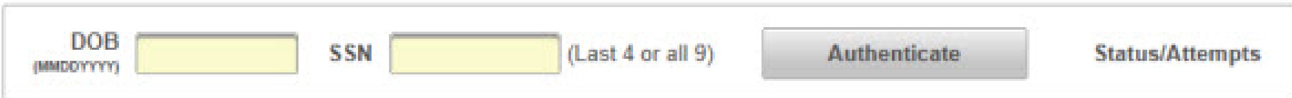
19 How to Enter Applicant Data

How to Enter Applicant Data

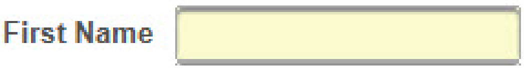
Data about the person placing the order is in the **Applicant Data** section. Required fields are shaded yellow.



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

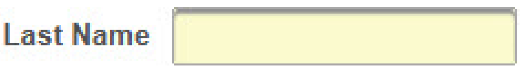


Step 1 Enter **First Name** of the person placing the order

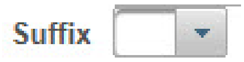


Step 2 Enter **Middle Name** of the person placing the order

Step 3 Enter **Last Name** of the person placing the order

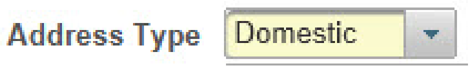


Step 4 Choose suffix (Mr., Mrs. Ms..) from the drop down list



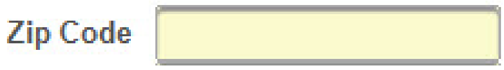
Step 5 Enter **Email** address of the person placing the order

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

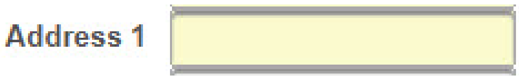


Step 7 Enter **Zip Code** of person placing the order. This will populate the **City** and

State fields



Step 8 Enter street Address of person placing the order

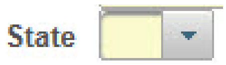


Step 9 Enter additional Address information line of person placing the order (if needed)

Step 10 Enter City of residence of person placing the order (if not correctly pre-populated from the zip code)

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

Step 14

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

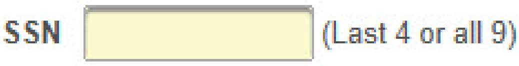
Authentication

DOB

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

SSN

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



Authentication

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

Status/Attempts

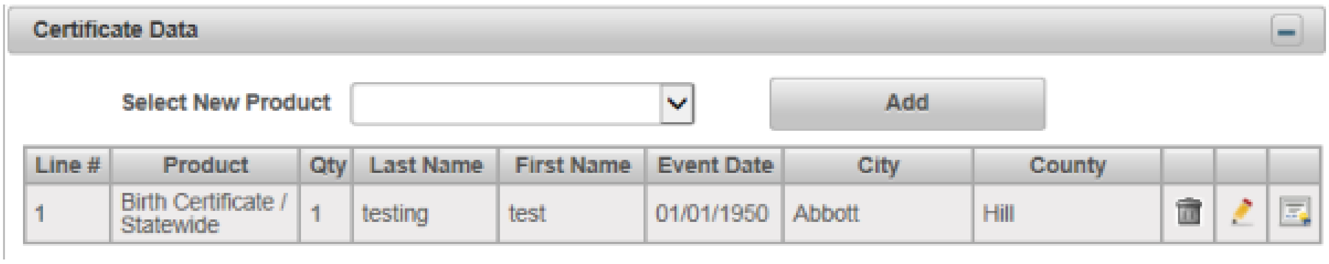
Status displays the results of the Authentication process (Passed or Failed)and **Attempts** displays the number of times the applicant clicked the **Authenticate** button to submit the information.

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

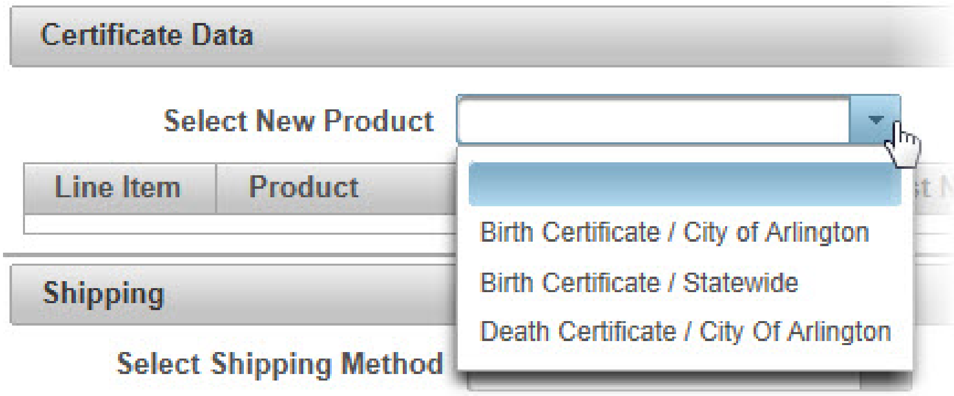
How to Enter Birth Certificate Data

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



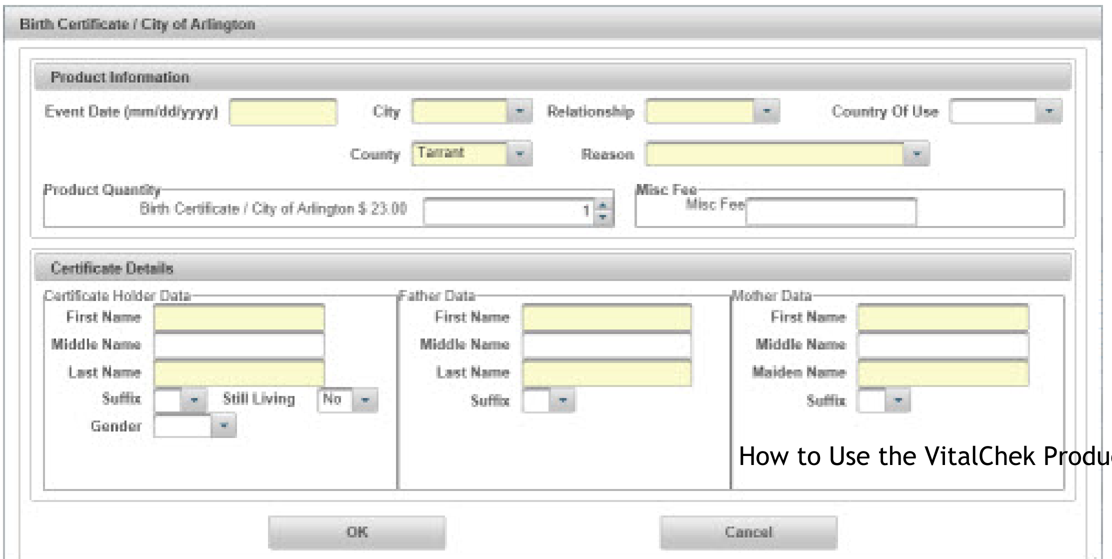
Step 1 Select a **Birth Certificate** option from the **Select New Product** drop down list that displays available certificates for the selected Agency.

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

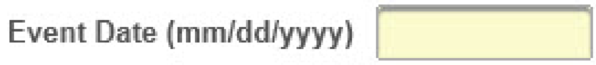


Step 2 Click **Add** button

Step 3 **Birth Certificate** page displays

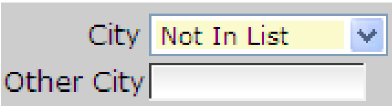


Step 4 Enter **Event Date** in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.



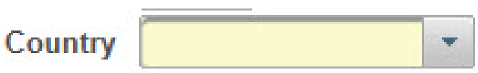
Step 5 Select **City** from the drop down list. This is the city where the event occurred.

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.*

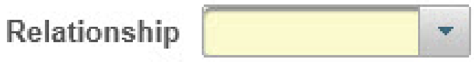


If the applicant does not know the city where the event occurred, select ***Not in List*** *and enter* ***County*** *(step 6).*

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

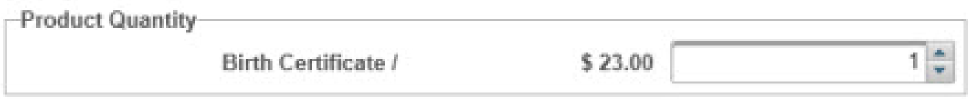


Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")

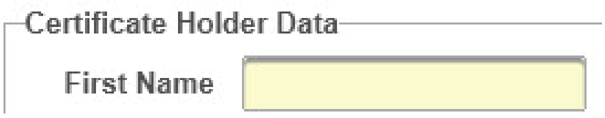


Step 8 ***Country of Use*** *is only required when the Applicant is requesting an Apostille. Select the county that the Apostille is being used for from the drop down list.*

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

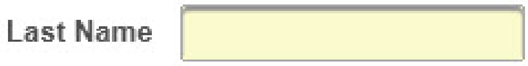


Step 10 Enter **Certificate Holder Data**, starting with the **First Name** of the person that is listed on the certificate

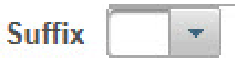


Step 11 Enter the **Middle Name** (if required) of the person that is listed on the certificate

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

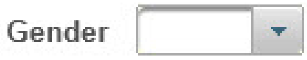


Step 13 Select a suffix from the drop down list

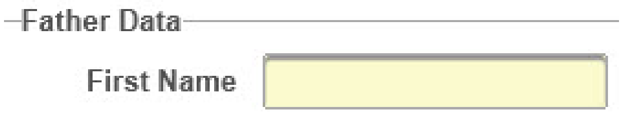


Step 14 Select Yes or No from the **Still Living** drop down list

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

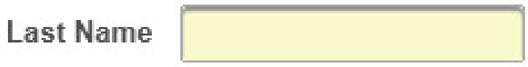


Step 16 Enter **Father Data**, starting with the certificate holders father's **First Name**

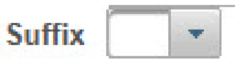


Step 17 Enter the (certificate holders) father's **Middle Name** (if required)

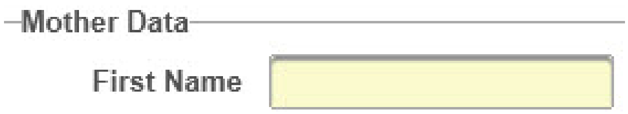
Step 18 Enter the (certificate holders) father's **Lasts Name**



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

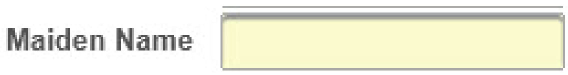


Step 20 Enter **Mother Data**, starting with the certificate holders mother's **First Name**

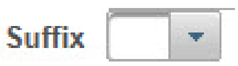


Step 21 Enter the (certificates holders) mother's **Middle Name** (if required)

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



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



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

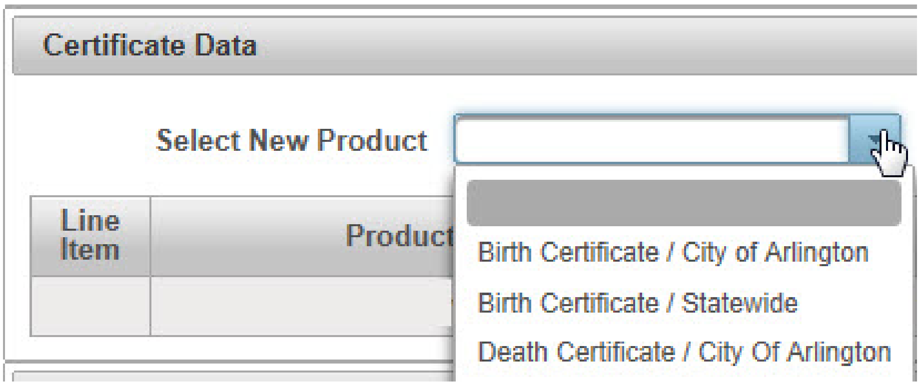
21 How to Enter Death Certificate Data

How to Enter Death Certificate Data

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

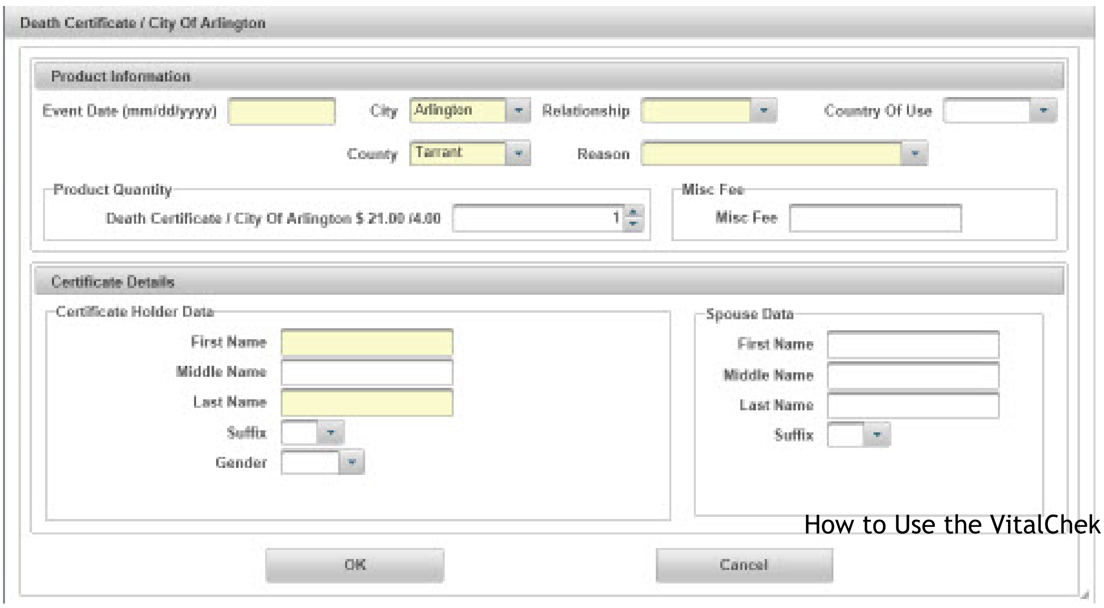
Step 1 Select a **Death Certificate** option from the **Select New Product** drop down list that displays available certificates for the selected Agency.

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

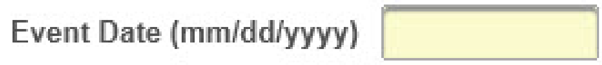


Step 2 Click **Add** button

Step 3 **Death Certificate** page displays

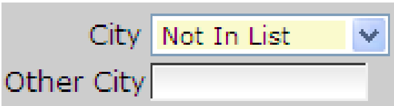


Step 4 Enter **Event Date** in mm/dd/yyyy format. This is the date that the event listed on the certificate occurred.



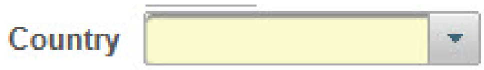
Step 5 Select **City** from the drop down list. This is the city where the event occurred.

*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.*

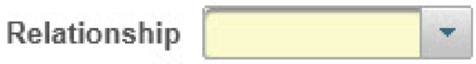


*If the applicant does not know the city where the event occurred, select **Not in List** and enter **County** (step 6).*

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



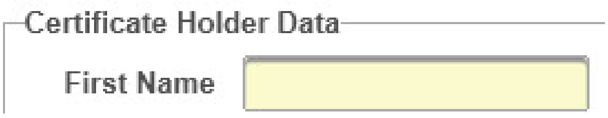
Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")



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)

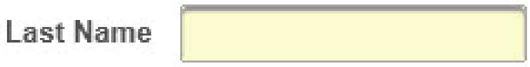
Step 10 Enter **Certificate Holder Data**, starting with the **First Name** of the person that is listed on the certificate



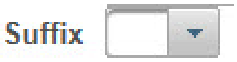
Step 11 Enter the **Middle Name** (if required) of the person that is listed on the certificate

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

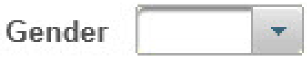
12



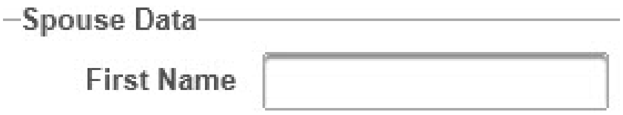
Step 13 Select a suffix from the drop down list



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

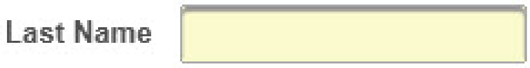


Step 15 Enter **Spouse Data**, (if applicable)

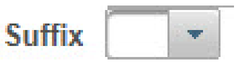


Step 16 Enter the Spouse's **Middle Name** (if applicable/required)

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



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



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

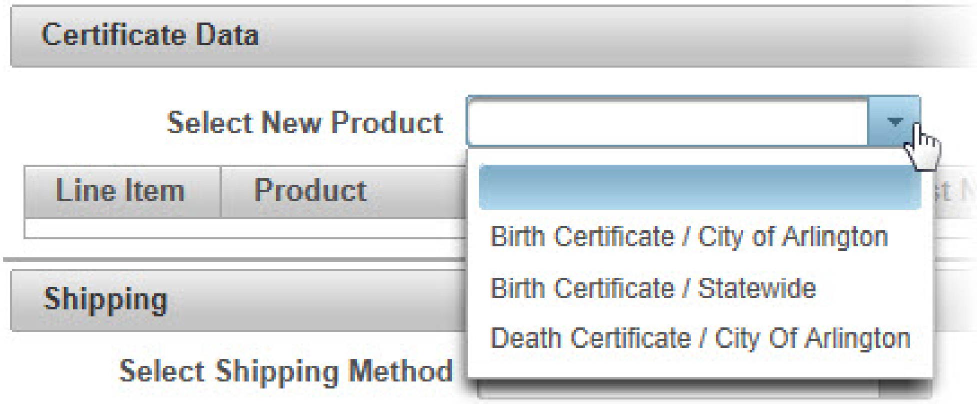
22 How to Enter Marriage Certificate Data

How to Enter Marriage Certificate Data

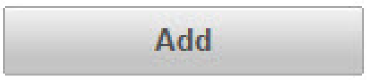
Information about the certificate(s) is entered into the **Certificate Data** section. Required fields are shaded in yellow.

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

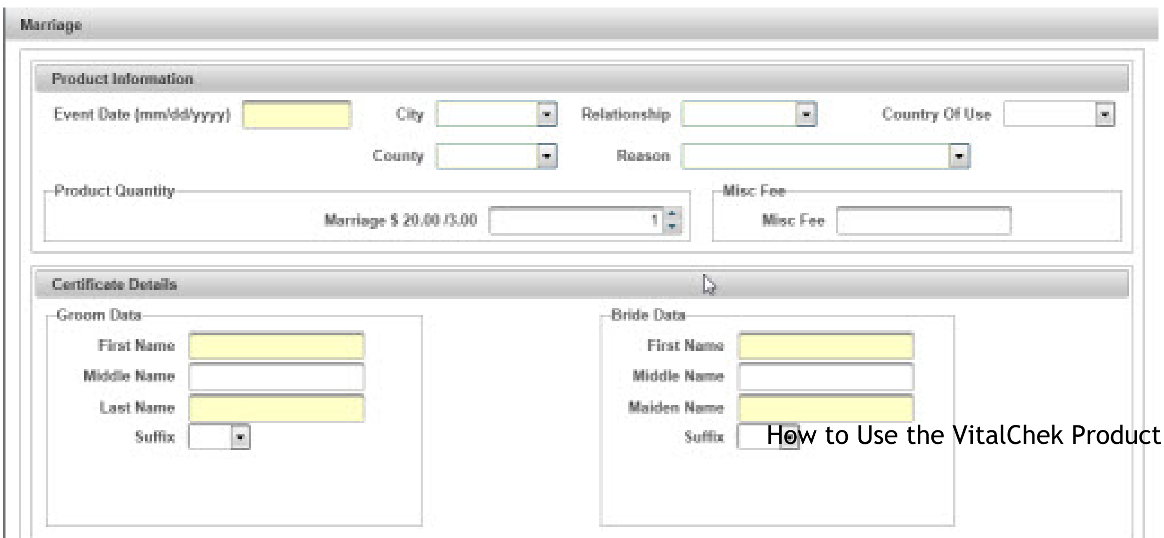
Note - Agencies that offer only 1 product will default to the available product.



Step 2 Click **Add** button



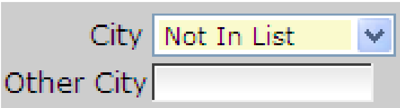
Step 3 **Marriage Certificate** page displays



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

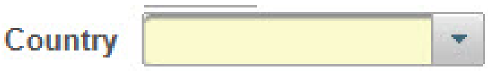
Step 5 Select **City** from the drop down list. This is the city where the event occurred.

*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.*

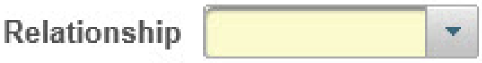


*If the applicant does not know the city where the event occurred, select **Not in List** and enter **County** (step 6).*

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



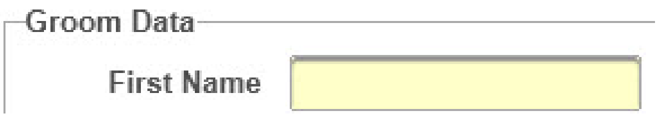
Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")



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.*

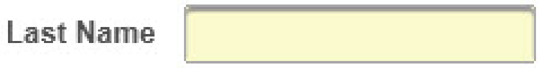
Step 9 Enter the **Product Quantity**, (number of certificates)

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

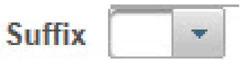


Step 11 Enter the **Middle Name** (if required) of the Groom that is listed on the certificate

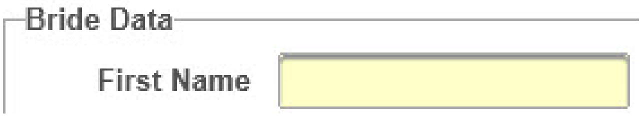
Step 12 Enter the Last Name of the Groom that is listed on the certificate



Step 13 Select a suffix from the drop down list

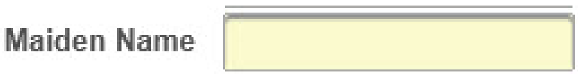


Step 16 Enter Bride Data, starting with the Bride's First Name

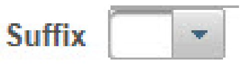


Step 17 Enter the Bride's Middle Name (if required)

Step 18 Enter the Bride's Maiden Name



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



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

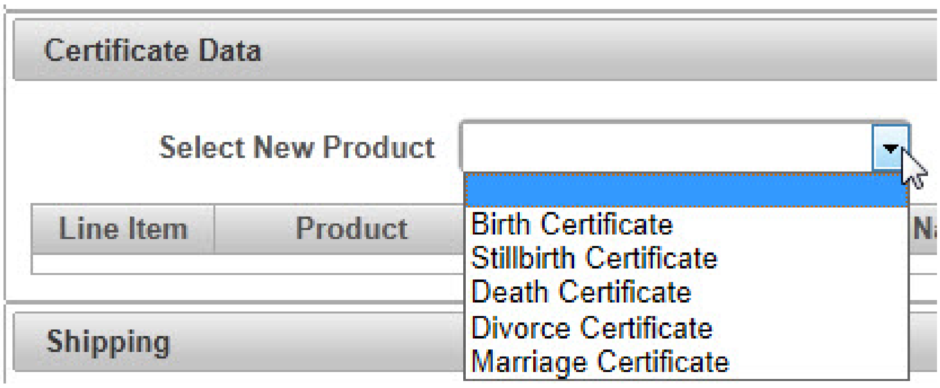
23 How to Enter Divorce Certificate Data

How to Enter Divorce Certificate Data

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

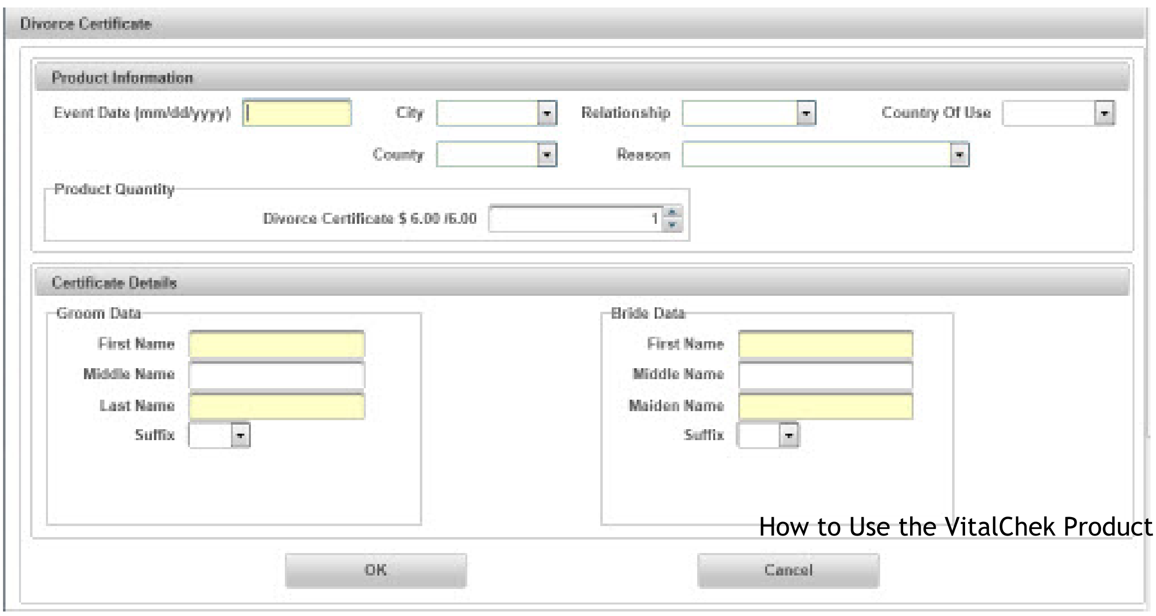
Step 1 Select the **Divorce Certificate** option from the **Select New Product** drop down list that displays available certificates for the selected Agency.

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



Step 2 Click **Add** button

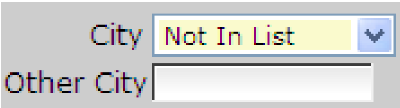
Step 3 **Divorce Certificate** page displays



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

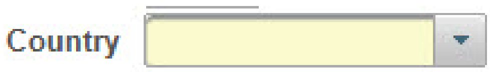
Step 5 Select **City** from the drop down list. This is the city where the event occurred.

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.*

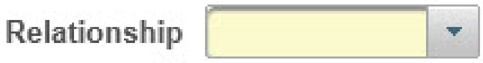


If the applicant does not know the city where the event occurred, select ***Not in List*** *and enter* ***County*** *(step 6).*

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



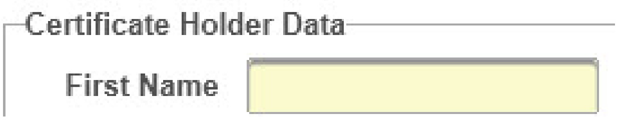
Step 7 Select **Relationship** from the drop down list. This is the relationship between the the person who is ordering the certificate ("Applicant") and the person who is listed on the certificate ("Certificate Holder")



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.*

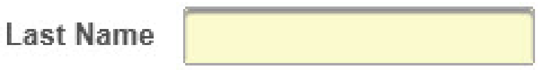
Step 9 Enter the **Product Quantity**, (number of certificates)

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

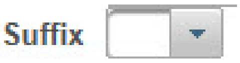


Step 11 Enter the **Middle Name** (if required) of the Groom that is listed on the certificate

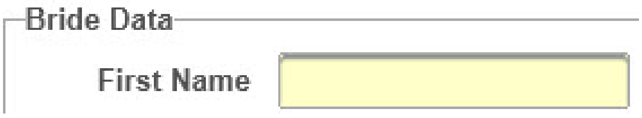
Step 12 Enter the **Last Name** of the Groom that is listed on the certificate



Step 13 Select a suffix from the drop down list

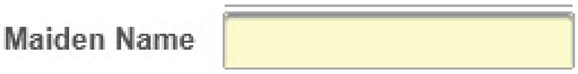


Step 16 Enter **Bride Data**, starting with the Bride's **First Name**

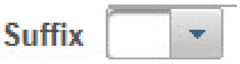


Step 17 Enter the Bride's **Middle Name** (if required)

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



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



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.

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

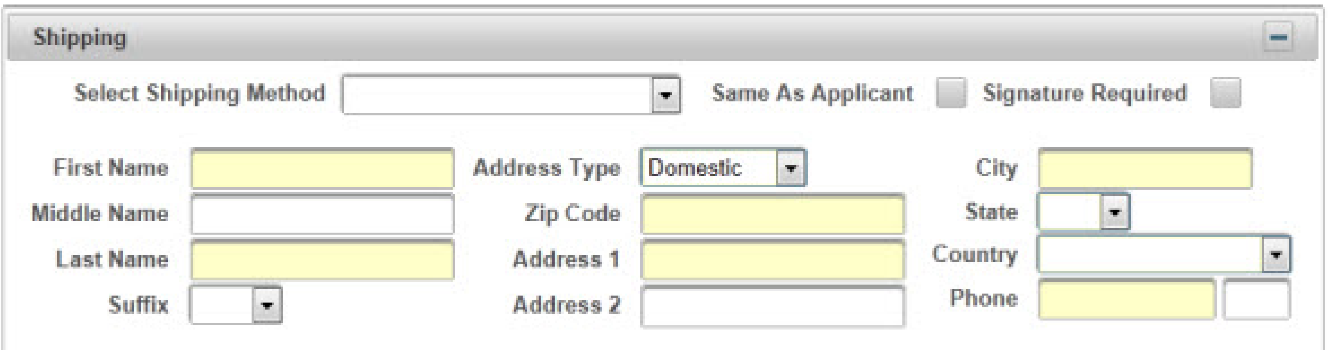
Step 4	Enter **Amount** of the Payment
Step 5	Enter the **Document Number**
Step 6	Enter the **Document Type**
Step 7	Confirm if certified copies are required, Yes or No
Step 8	Click the **OK** button to continue order or **Cancel** to cancel product

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

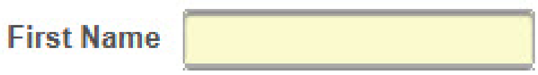


Step 1 Select **Shipping Method** from drop down list of available types of delivery methods

Step 2 It 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

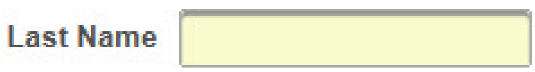
Note *Signature Required check box indicates that a signature is required at the time the certificate is delivered. Will be pre populated based on agency required*

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

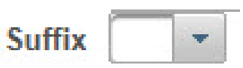


Step 4 Enter **Middle Name** of the person the order ships to

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

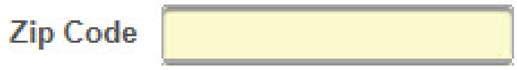


Step 6 Select **Suffix** of the person the order ships to from drop down list

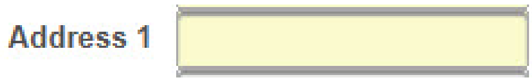


Step 7 Select address type from drop down (**Domestic, International, Military**)

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



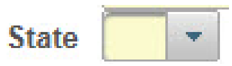
Step 9 Enter shipping street **Address**



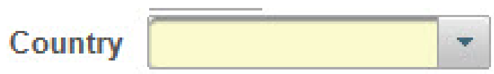
Step 10 If necessary, enter additional shipping **Address** information

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

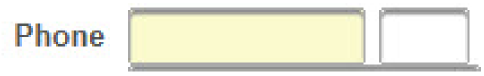
Step 12 Enter shipping **State** if not correct from **Zip Code** entry (step 8)



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



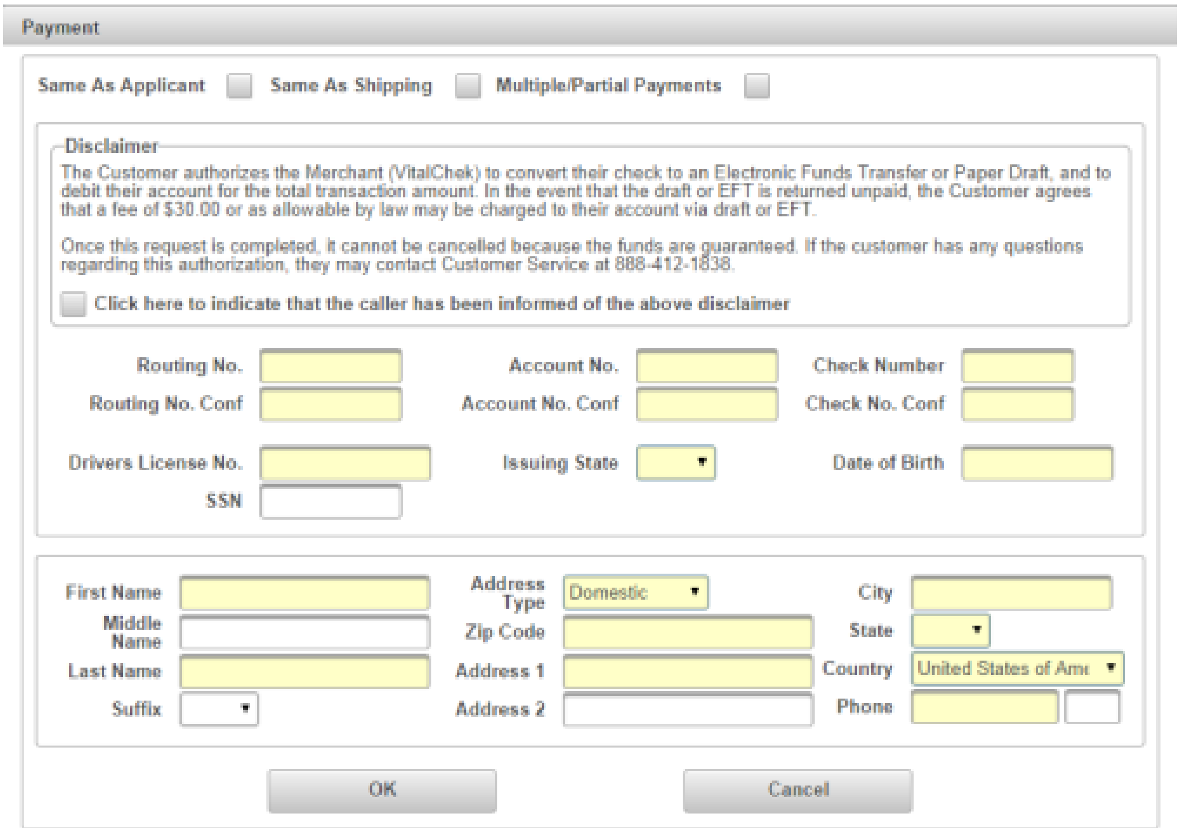
Step 14 Enter 10 digit **Phone** number of person the order is shipped to



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

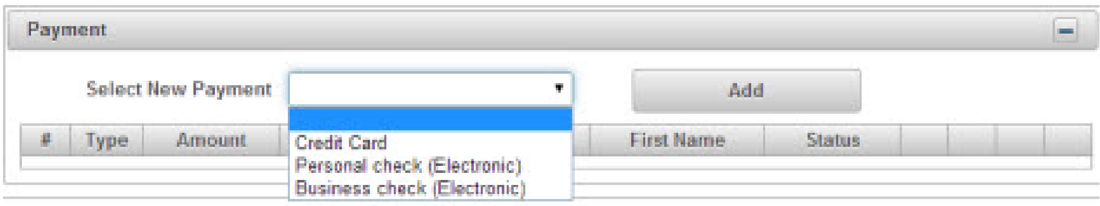
How to Enter Payment with a Personal Check (electronic)

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

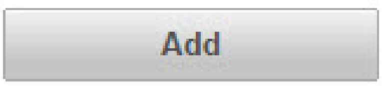


Step 1 Select **Personal Check** from **Select New Payment** drop down.

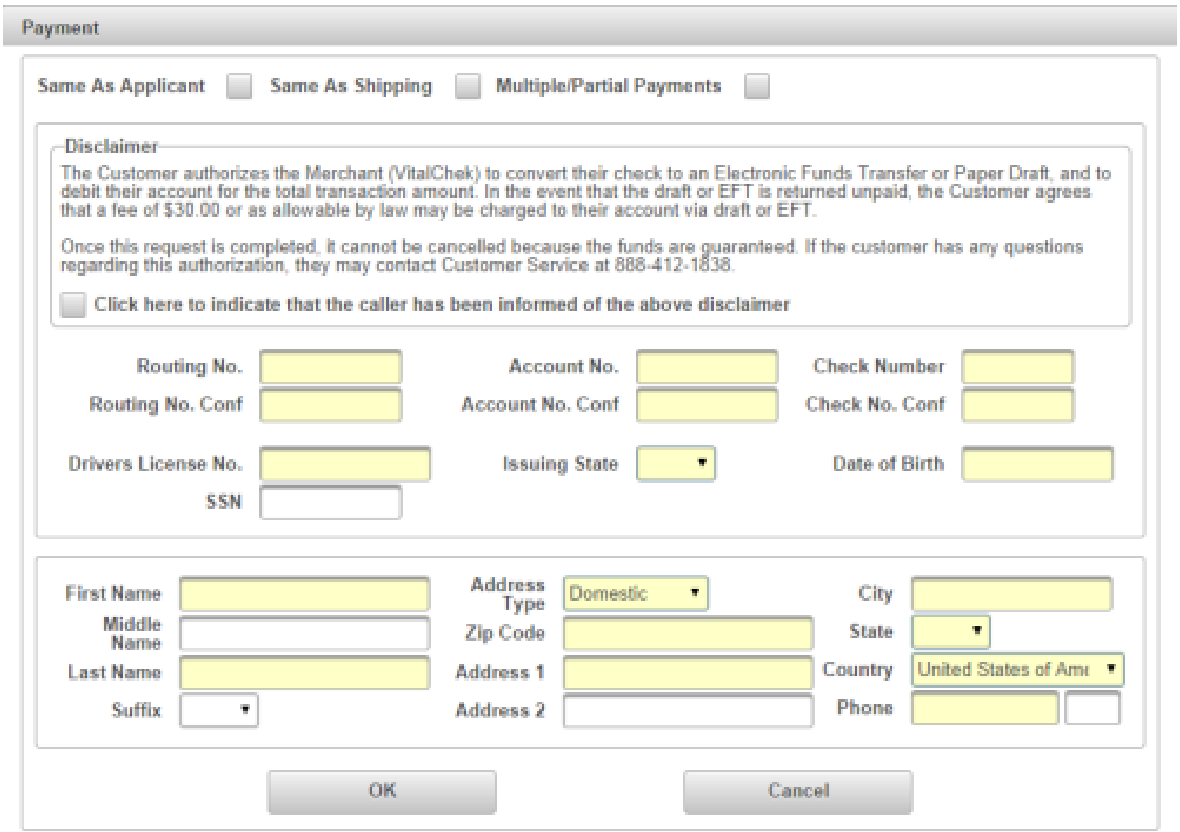
Note - Agencies that offer only 1 payment type default to that available payment type.



Step 2 Click **Add** button



Step 3 Payment screen for Check selection is displayed



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 Check Disclaimer Confirmation box indicating the caller has been informed of the

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 Renter **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

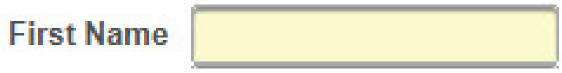
Check No. Conf

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

Step 16 Complete all name and address fields.

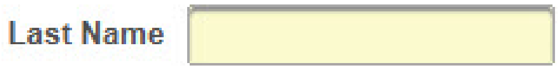
*Note - clicking to select **Same as Applicant** or **Same as Shipping** will populate address fields*

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

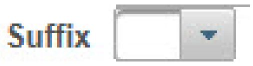


Step 18 Enter **Middle Name** of person making payment on the order (checking account holder)

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



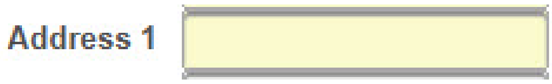
Step 20 Select **Suffix** of the person making payment on the order (checking account holder)



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

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

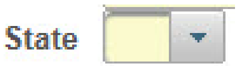
Step 23 Enter **Street Address** of the person making payment on the order (checking account holder)



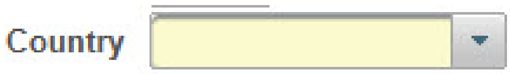
Step 24 Enter additional **Street Address** of the person making payment on the order (checking account holder)

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

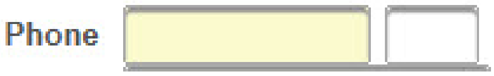
Step 26 Enter **State** of the person making the payment on the order (checking account holder)



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

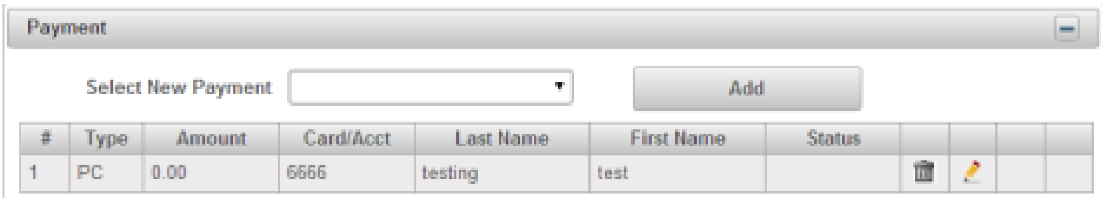


Step 28 Enter 10 digit **Phone** number of person making payment on the order (checking account holder)



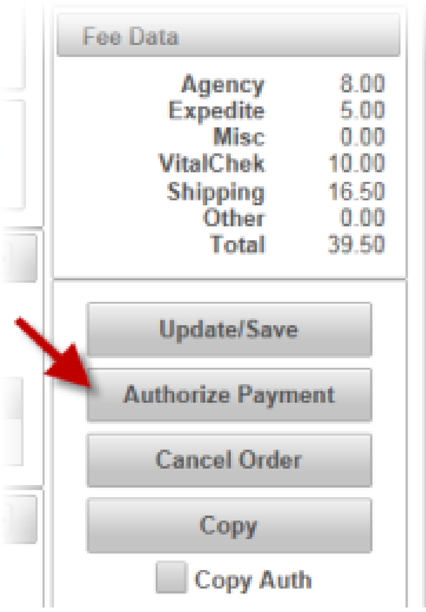
Step 29 Click **OK** button

Step 30 Check payment confirmation is displayed



#	Type	Amount	Card/Acct	Last Name	First Name	Status				
1	PC	0.00	6666	testing	test					

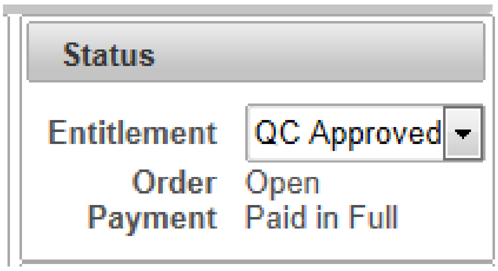
Step 31 **Authorize Payment** button will display, click to authorize payment



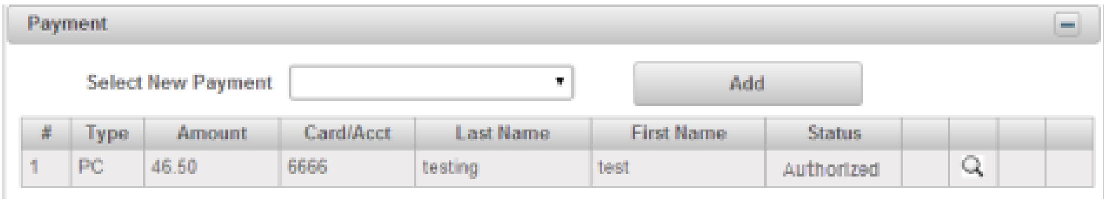
Step 32 Order is authorized and the following is displayed:

Authorized message appears:

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



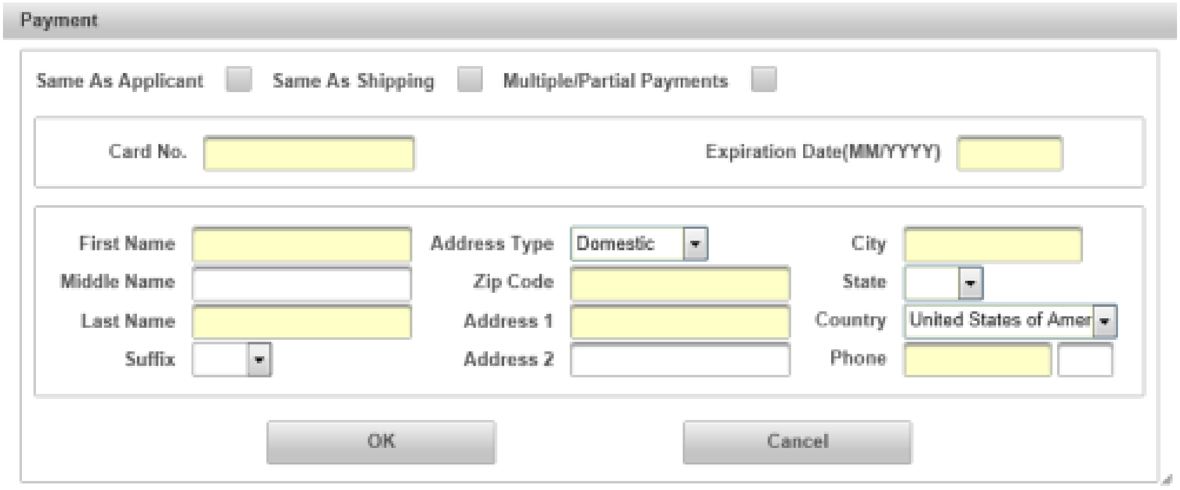
Payment information in Status section displays **Authorized**



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

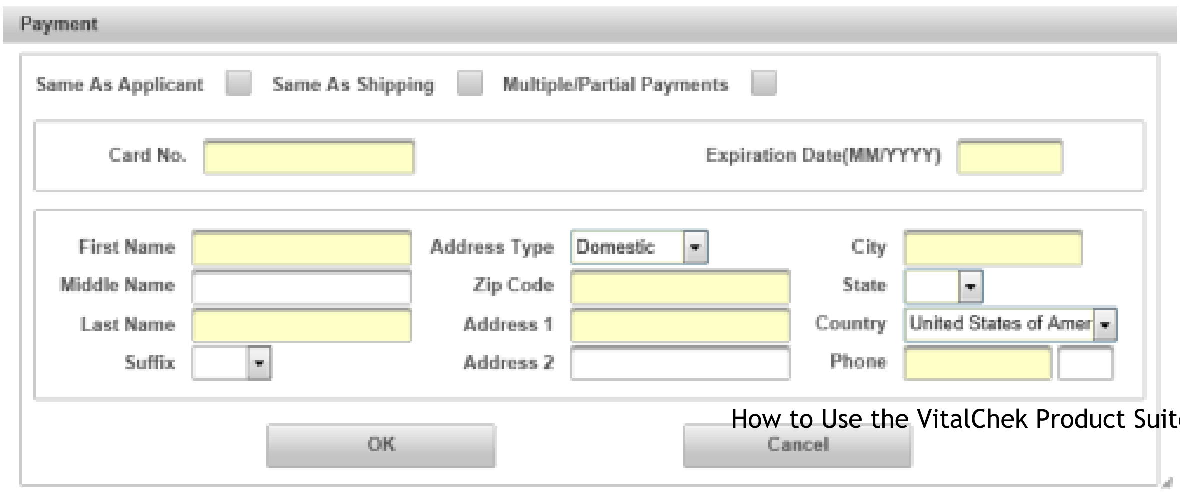


Step 1 Select **Credit Card** from **Select New Payment** drop down.

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



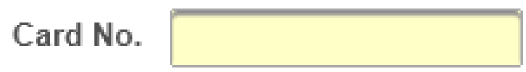
Step 4 Check **Same as Applicant** box if the person making the payment is the same as the person placing the order. *Checking **Same as Applicant** will remove name and address information from screen.*

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)

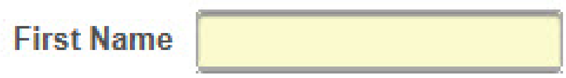


Step 7 Enter credit card **Expiration Date** (MM/YYYY)

Step 8 Complete all name and address fields.

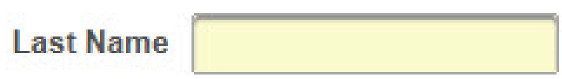
*Note - clicking to select **Same as Applicant** or **Same as Shipping** will populate address fields*

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

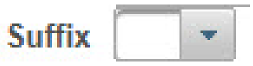


Step 10 Enter **Middle Name** of person making payment on the order (credit card holder)

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

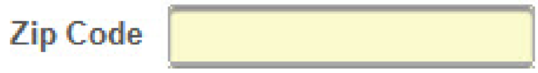


Step 12 Select Suffix of the person making payment on the order (credit card holder)

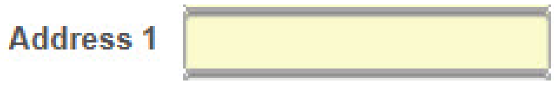


Step 13 Enter Address Type of the person making payment on the order (credit card holder)

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



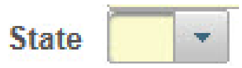
Step 15 Enter Street Address of the person making payment on the order (credit card holder)



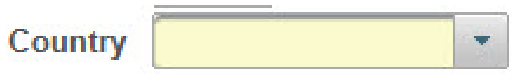
Step 16 Enter additional Street Address of the person making payment on the order (credit cardholder)

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

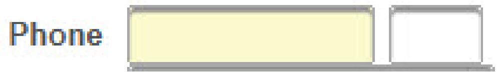
Step 18 Enter State of the person making the payment on the order (credit card holder)



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

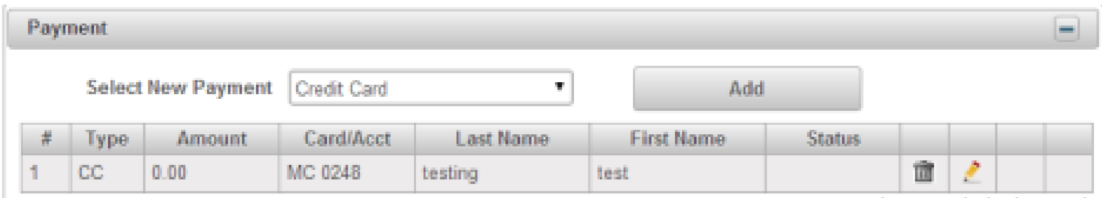


Step 20 Enter 10 digit Phone number of person making payment on the order (credit card holder)

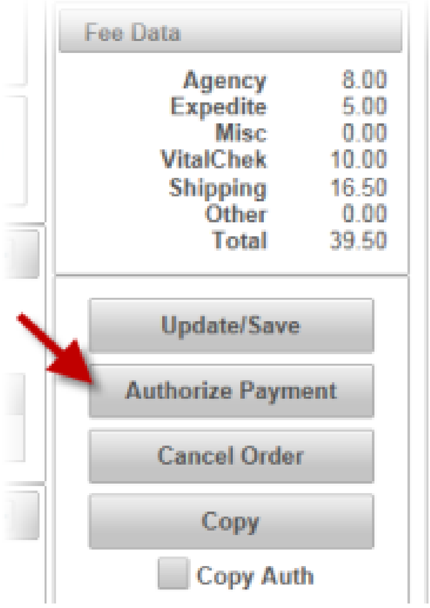


Step 21 Click OK button

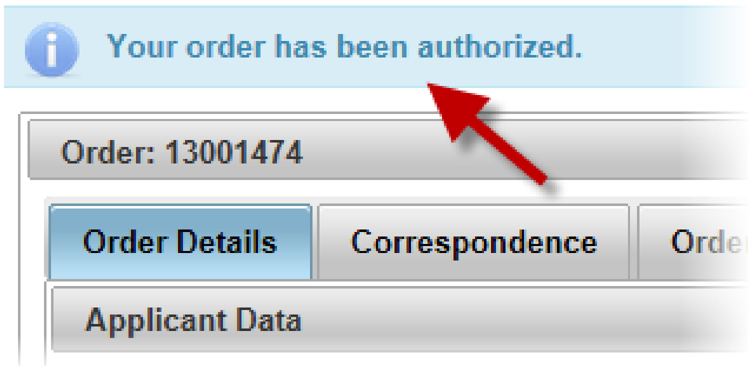
Step 22 Credit card payment information is displayed



Step 24 **Authorize Payment button will display, click to authorize payment**

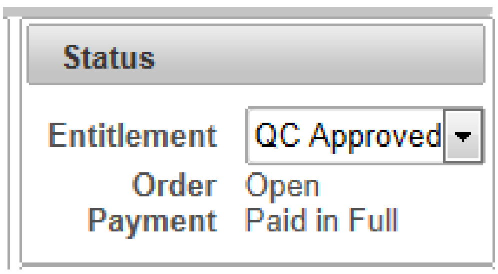


Step 25 Order is authorized and the following is displayed:

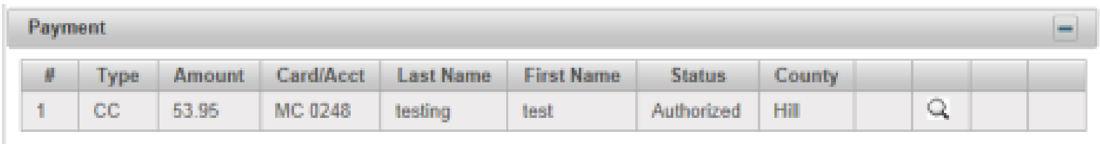


Authorized message appears:

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



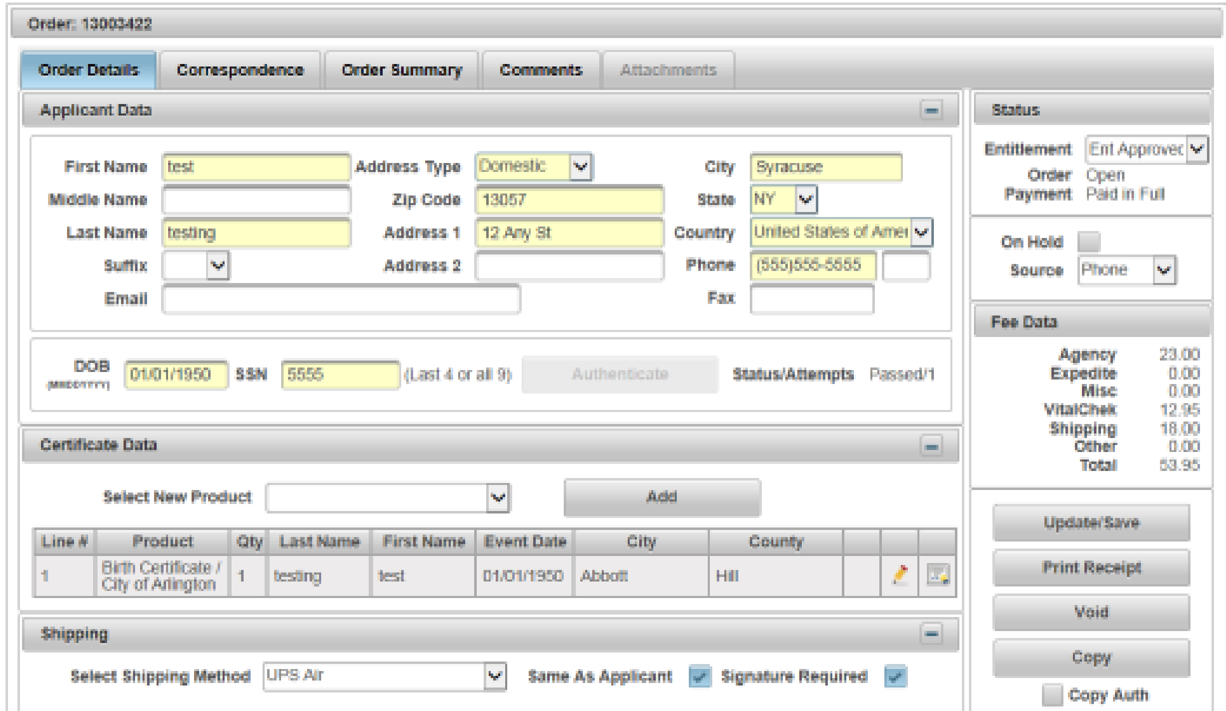
Payment information in Status section displays **Authorized**



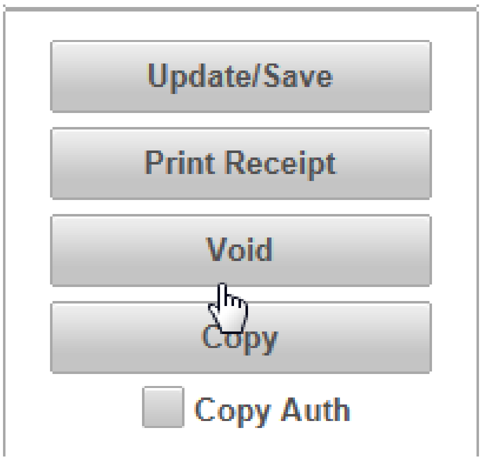
28 How to Void a Payment

How to Void a Payment	Orders that have been "**Paid in Full**" can be voided.

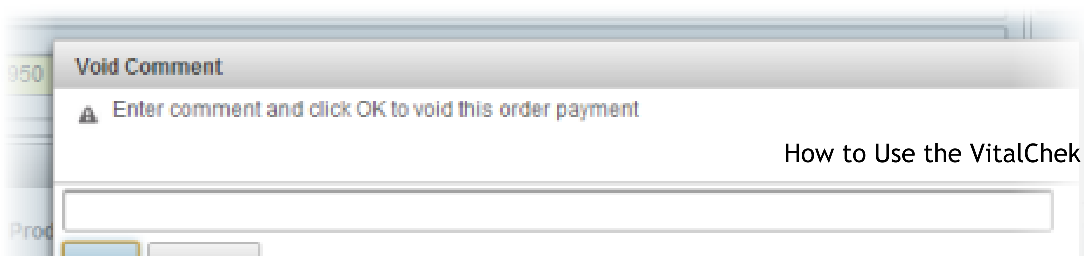
Step 1 View the order to be voided in one of the **Order Create** tabs (**Order Details, Correspondence, Order Summary, Comments** or **Attachments**)



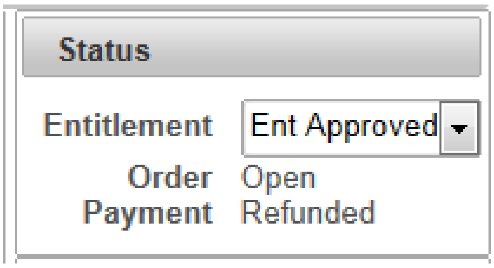
Step 2 Click the **Void** button



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



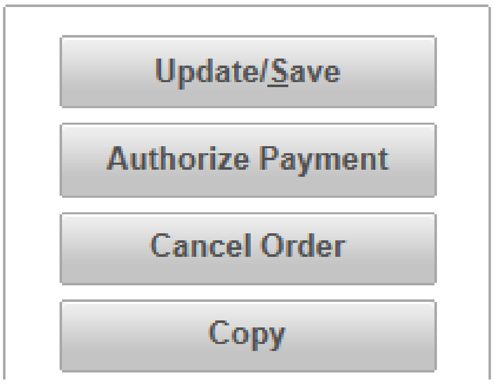
Step 3 Order is voided and **Payment Status** changes to **Refunded**



29 How to Copy Orders

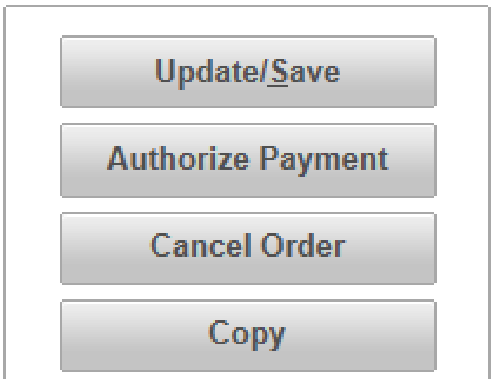
How to Copy Orders

Users can use the **Copy** process to duplicated orders

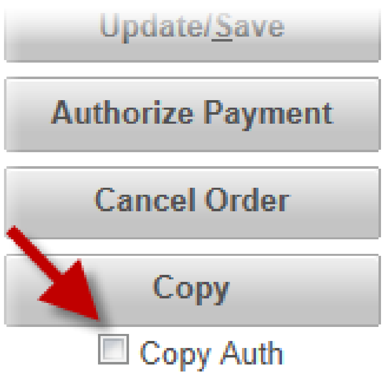


Step 1 Locate order to copy using any search criteria

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

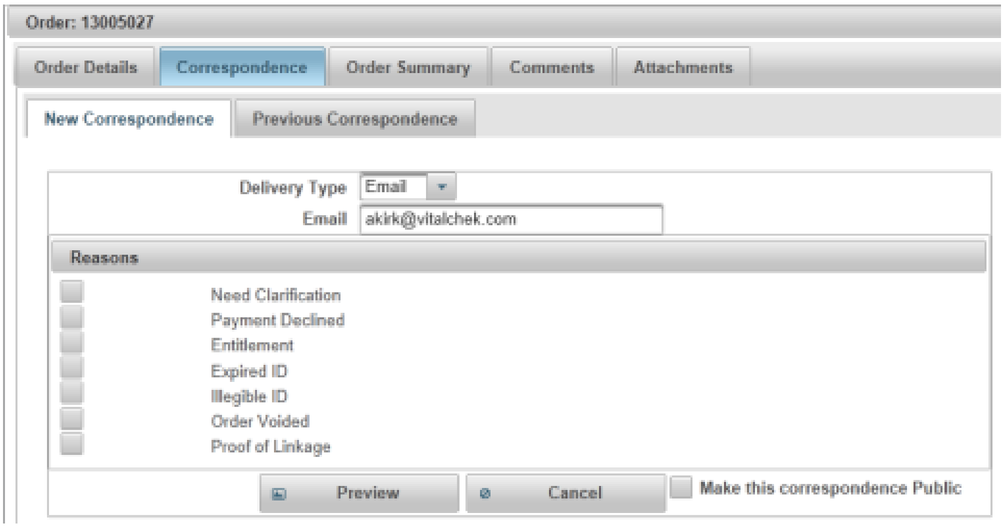


Step 3 Newly created order is displayed in **Order Details** with new order number

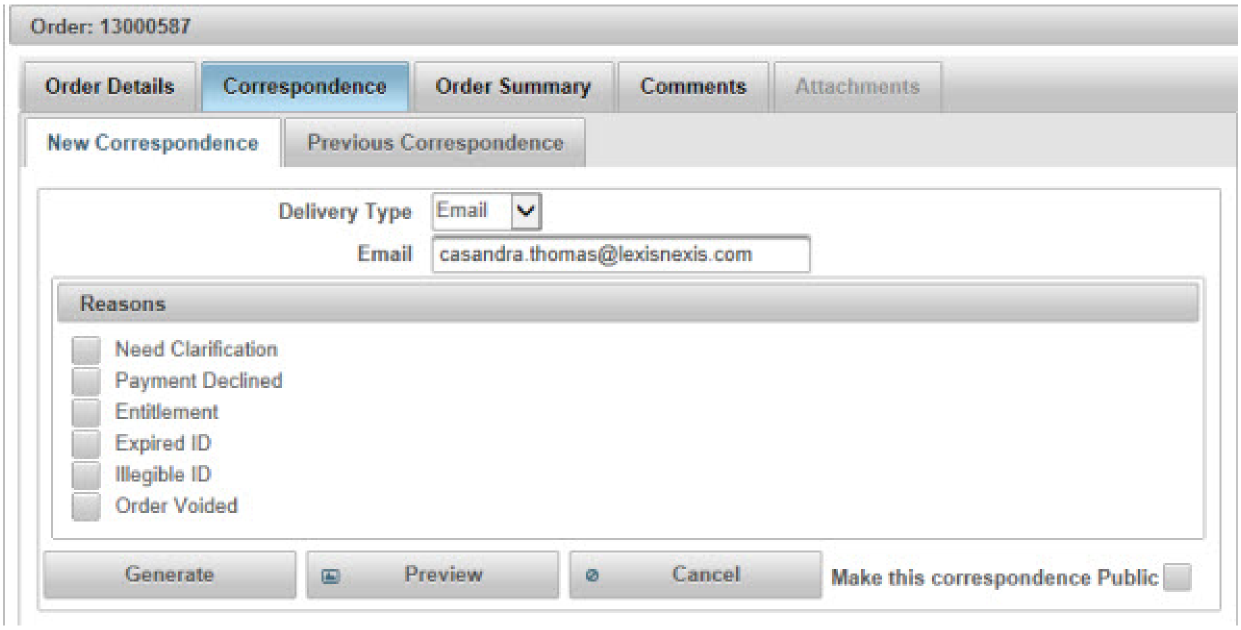
30 How to Send New Correspondence

How to Send New Correspondence

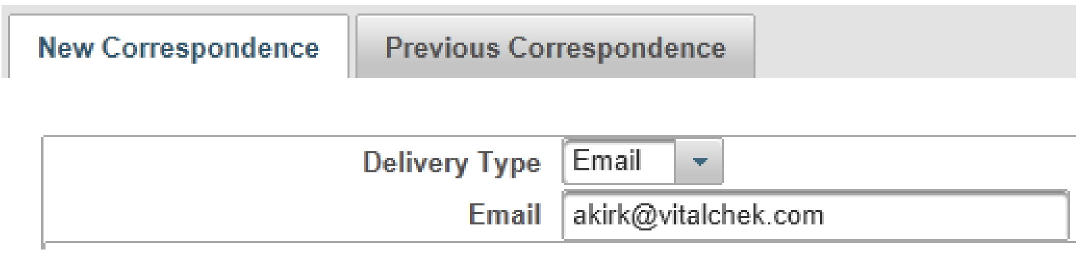
New Correspondence tab contains information on all written communication (e-mail/letter) available to send to the customer.



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

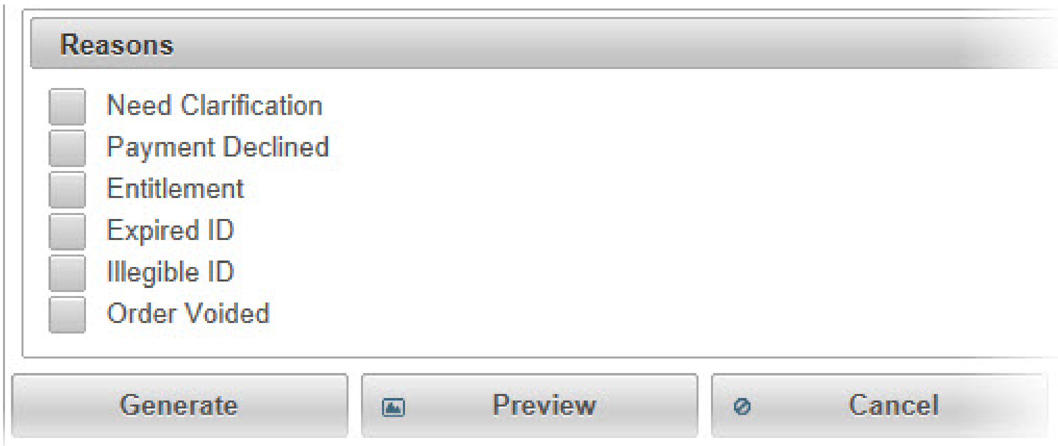


Step 2 Select **Delivery Type** from the available drop down list; **Delivery Type** defaults to email if an email has been provided

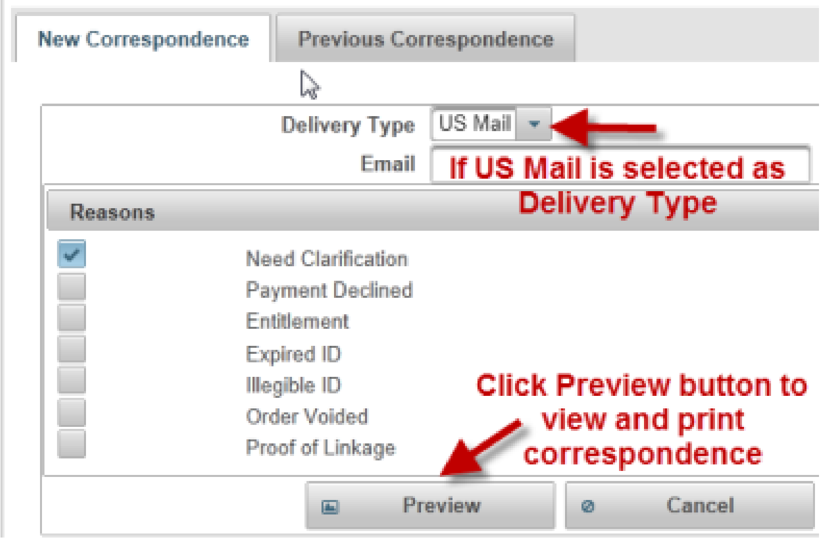


Step 3 Applicant's **Email** is autopopulated from order detail, revise if needed

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

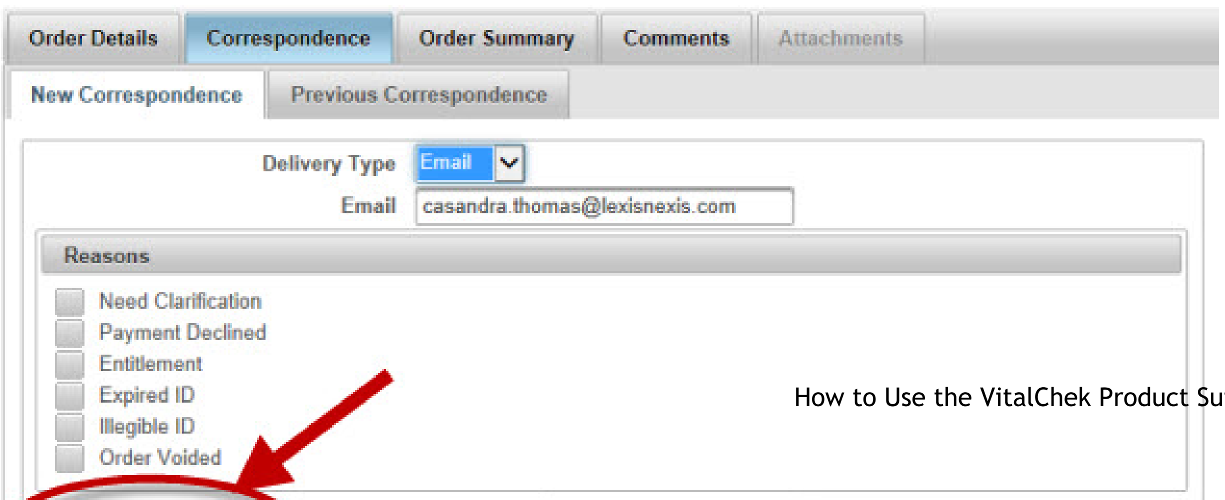


Step 5 *If **US Mail** is selected -*

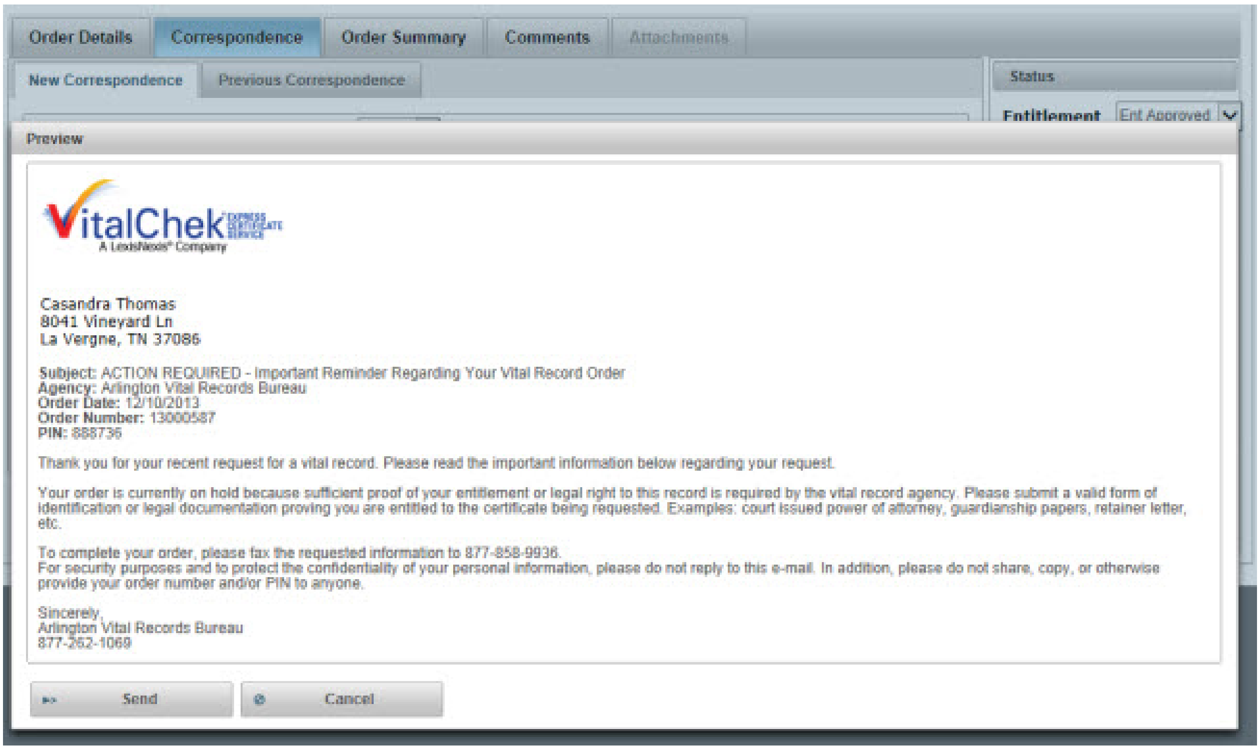


*If **Email** is selected -*

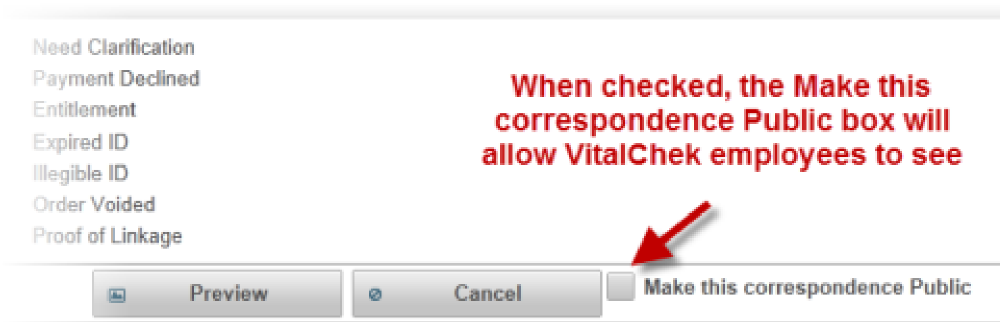
Click **Generate** to send an email



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*

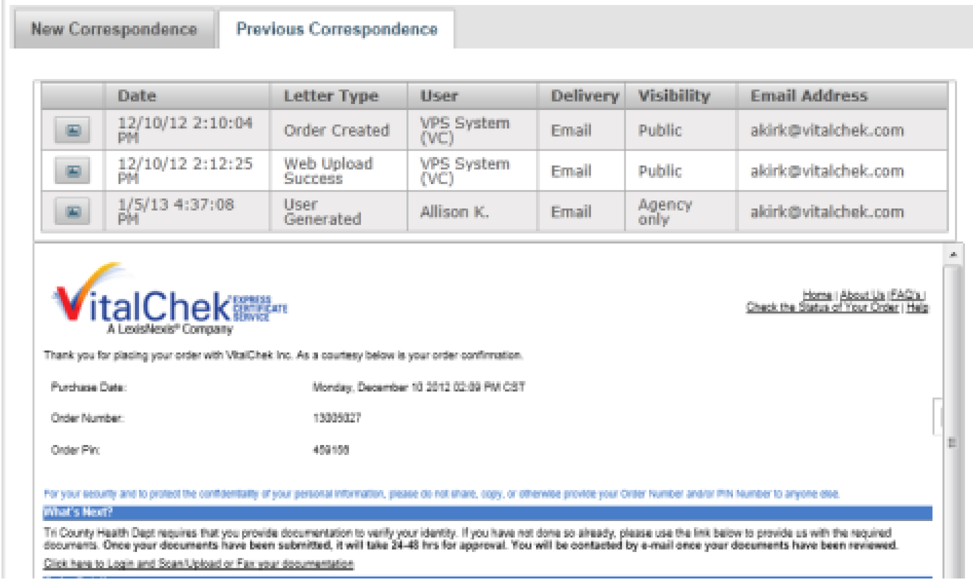


Step 6 Correspondence sent message appears

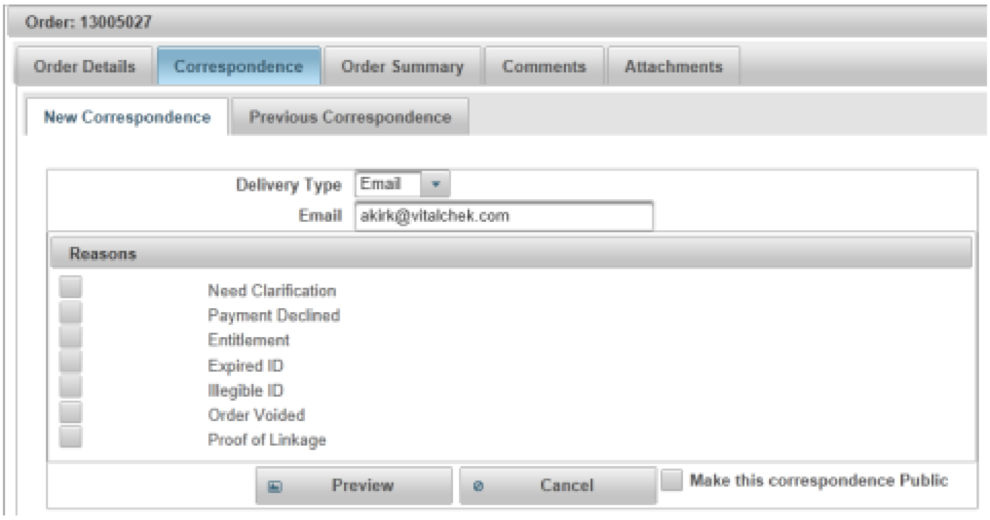
31 How to View and Resend Previous Correspondence

How to View and Resend Previous Correspondence

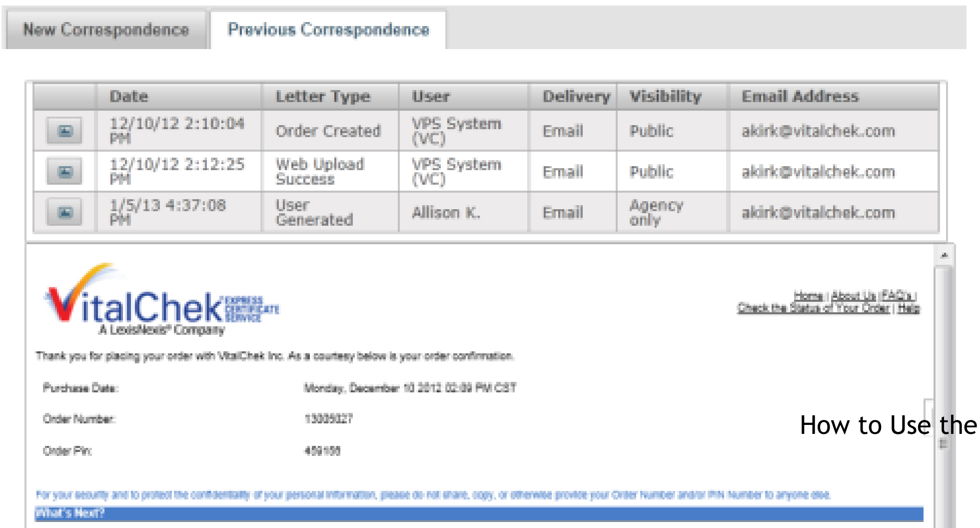
Correspondence that has been sent to the customer is listed in the **Previous Correspondence** section.



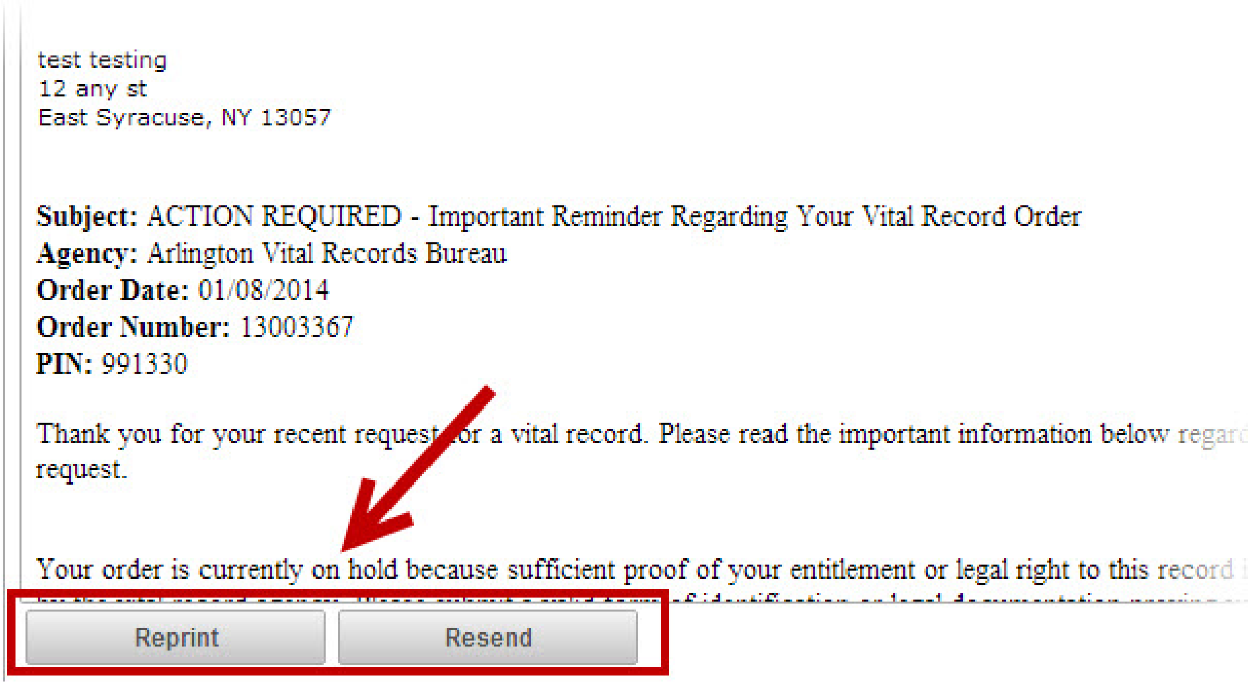
Step 1 From the **Order Details** for the order, click **Correspondence** tab. **New Correspondence** screen is displayed.



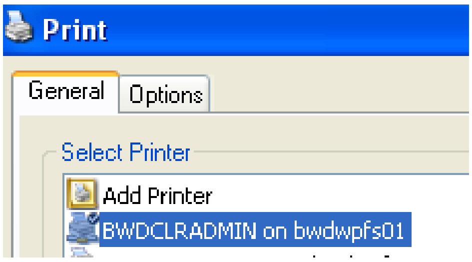
Step 2 Click **Previous** tab. **Previous** Correspondence is displayed



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.



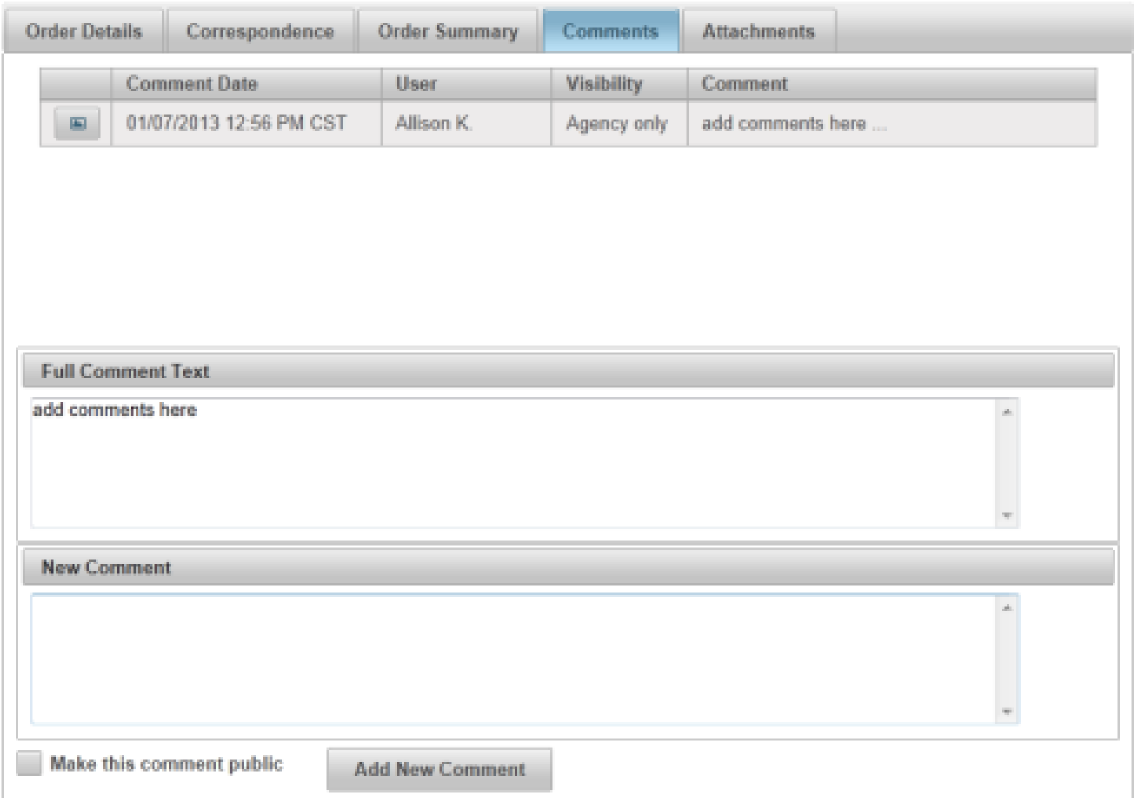
Resend button automatically emails to the email address in VPS.

Step 5 Correspondence successfully resent message appears

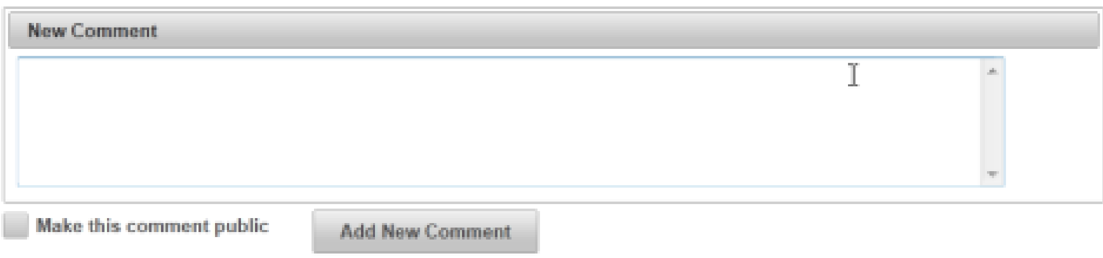
32 How to Add Comments to an Order

How to Add Comments to an Order

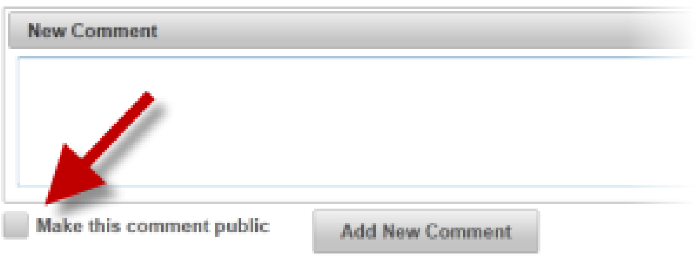
Comments are added to an order in the Comments section, from the Comments tab



Step 1 Enter comment text in the New Comment box

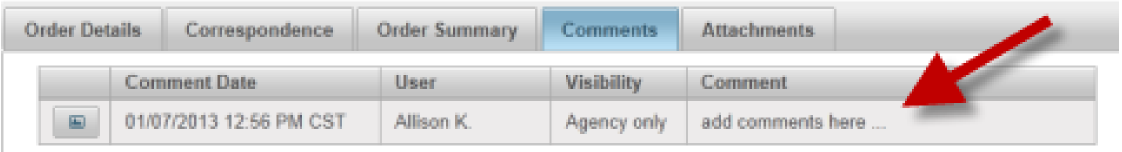


Step 2 Check the Make this comment public to allowVitalChek staff to view comment, or leave unchecked to keep comment viewable by agency staff only

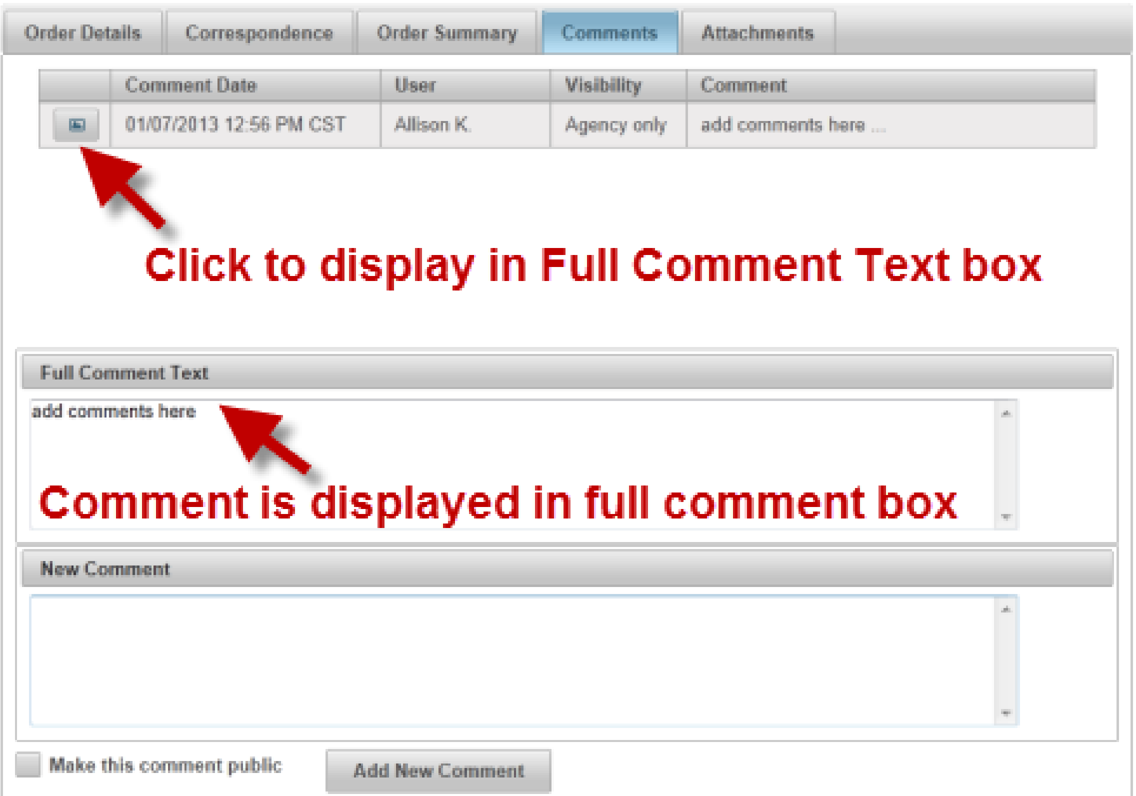


Step 3 Click Add New Comment button to add comment to order

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

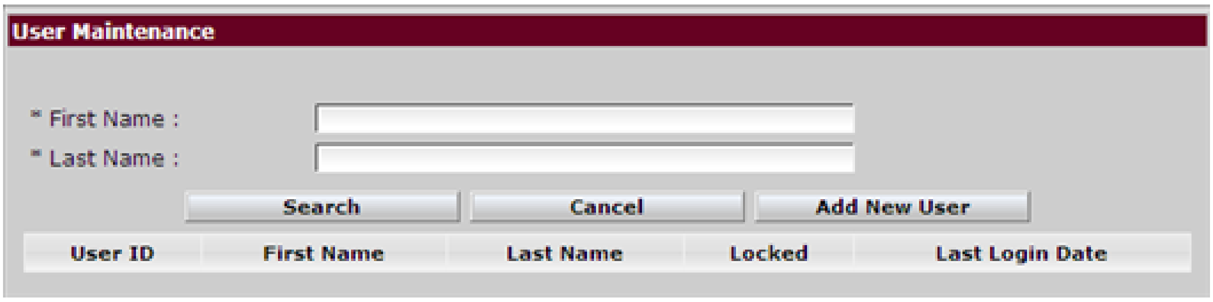


Step 5 Click on image icon in comment information box to display the complete comment in Full Comment Text box



33 How to Unlock Users2

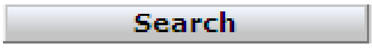
Step 1 From the Administration menu, select User Maintenance. User Maintenance screen is displayed



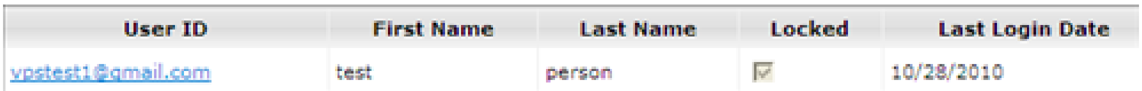
Step 2 Enter (at least) first letter of First Name of User

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

Step 4 Click Search button

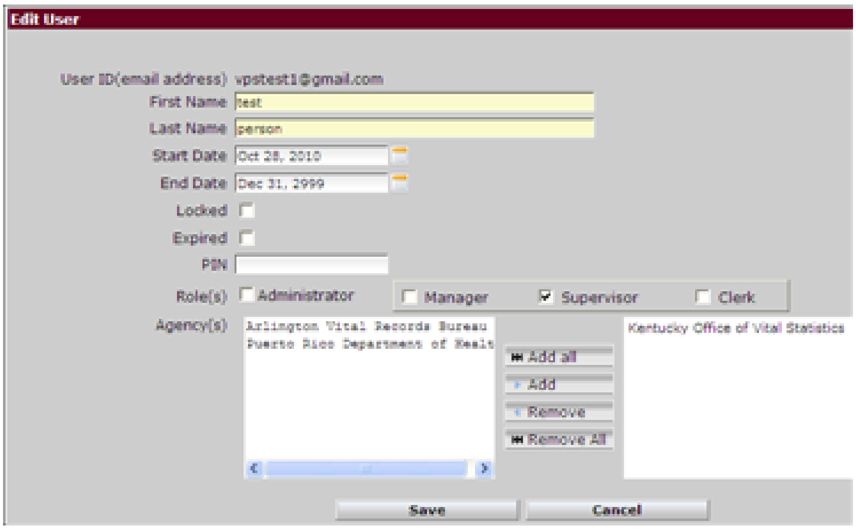


Step 5 Search result are displayed

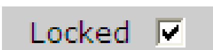


User ID	First Name	Last Name	Locked	Last Login Date
vpstest1@gmail.com	test	person	☑	10/28/2010

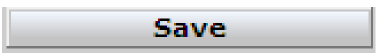
Step 6 Click on highlighted User ID to display Edit User screen



Step 7 Uncheck the Locked box

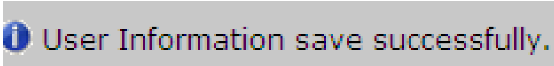


Step 8 Click Save button



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

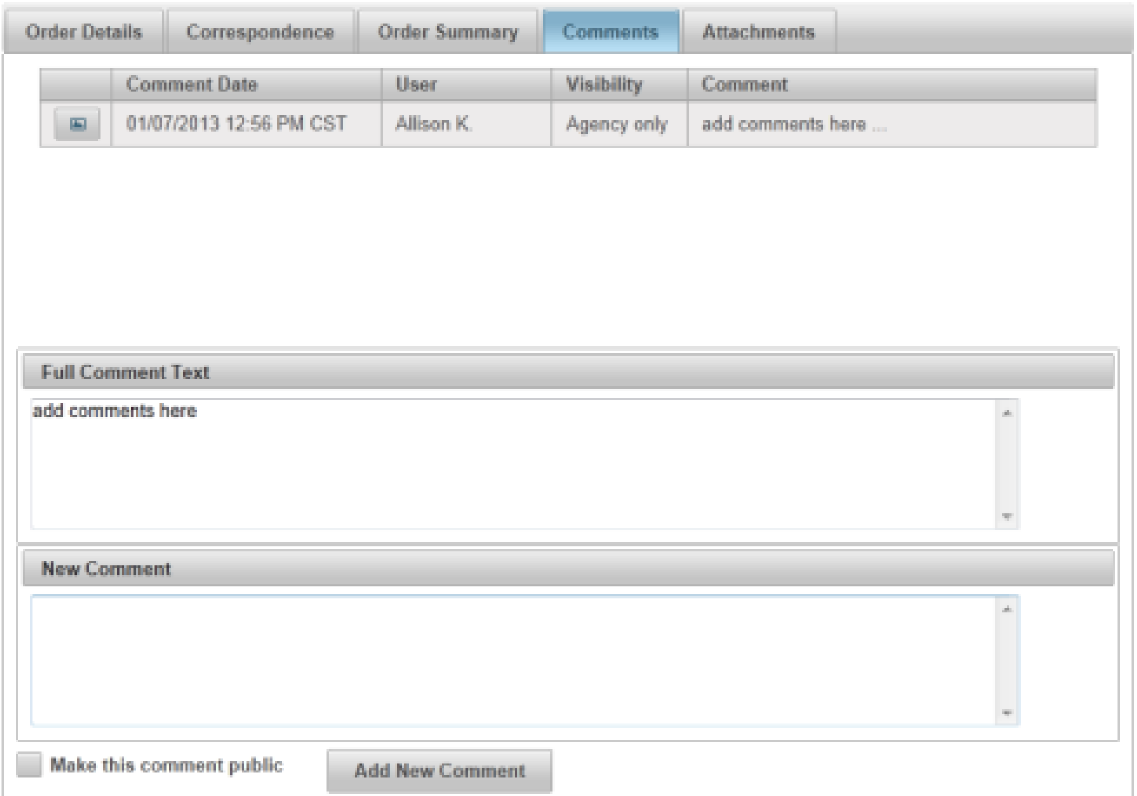
their password.



34 How to View Comments

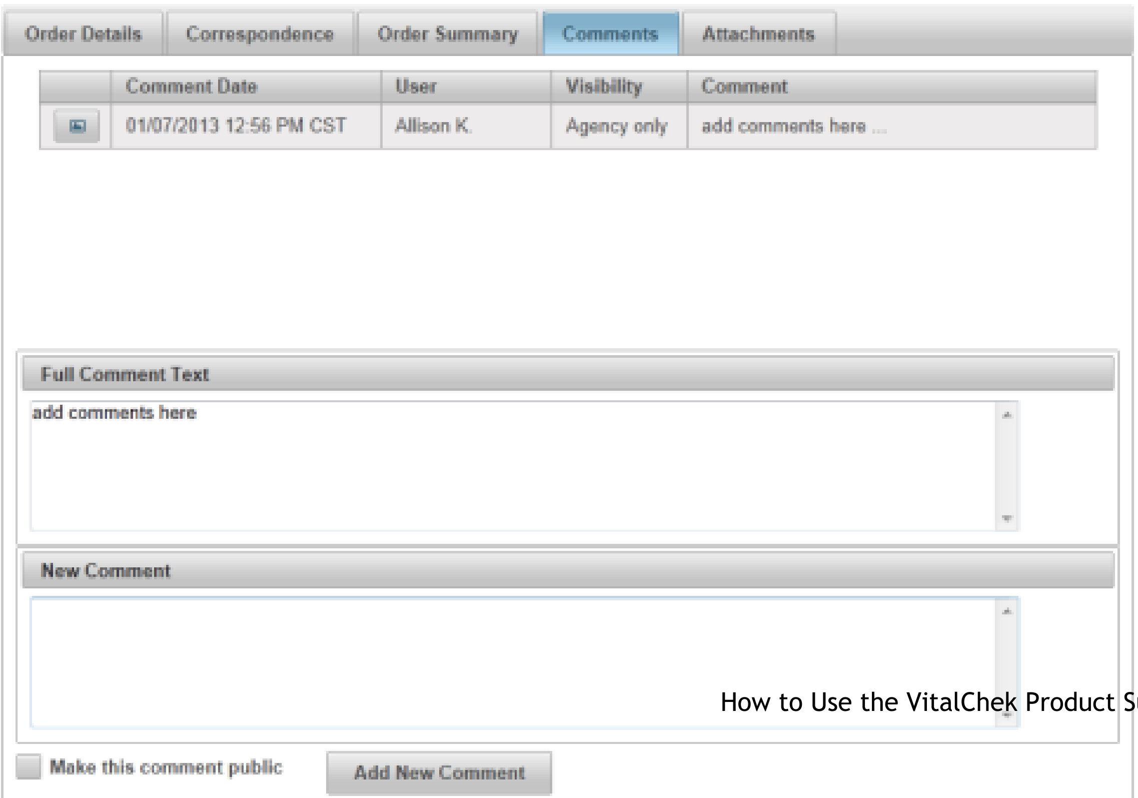
How to View Comments

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

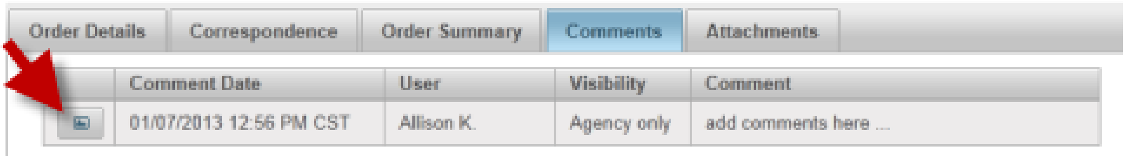


Step 1 From the **Orders** Section, with Order displayed, click **Comment** tab.

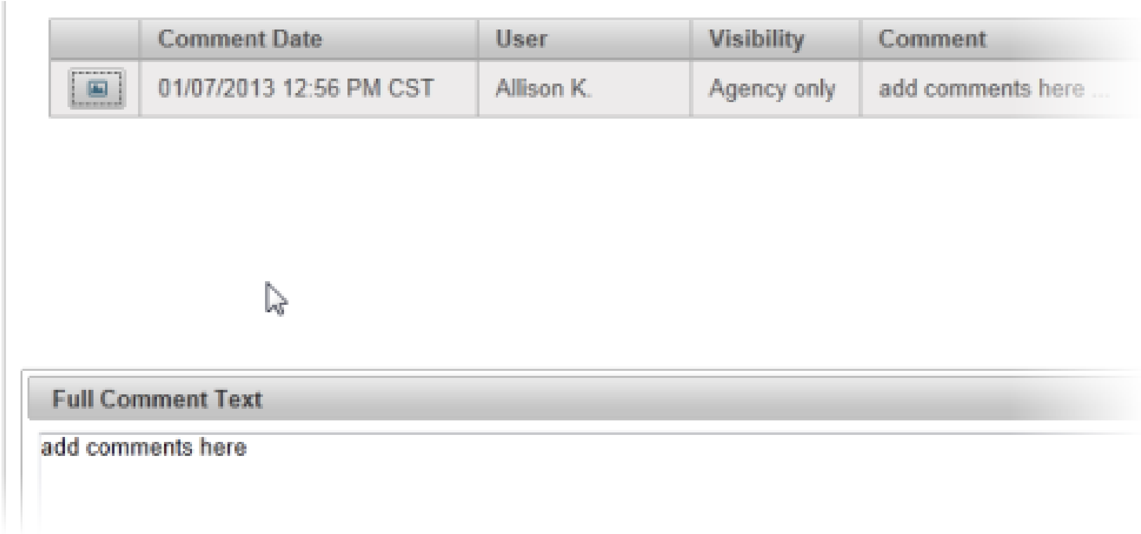
Details on the comments that have been added to the order will be displayed in the **Comment Date** box



Step 2 Click on the image icon to display comment



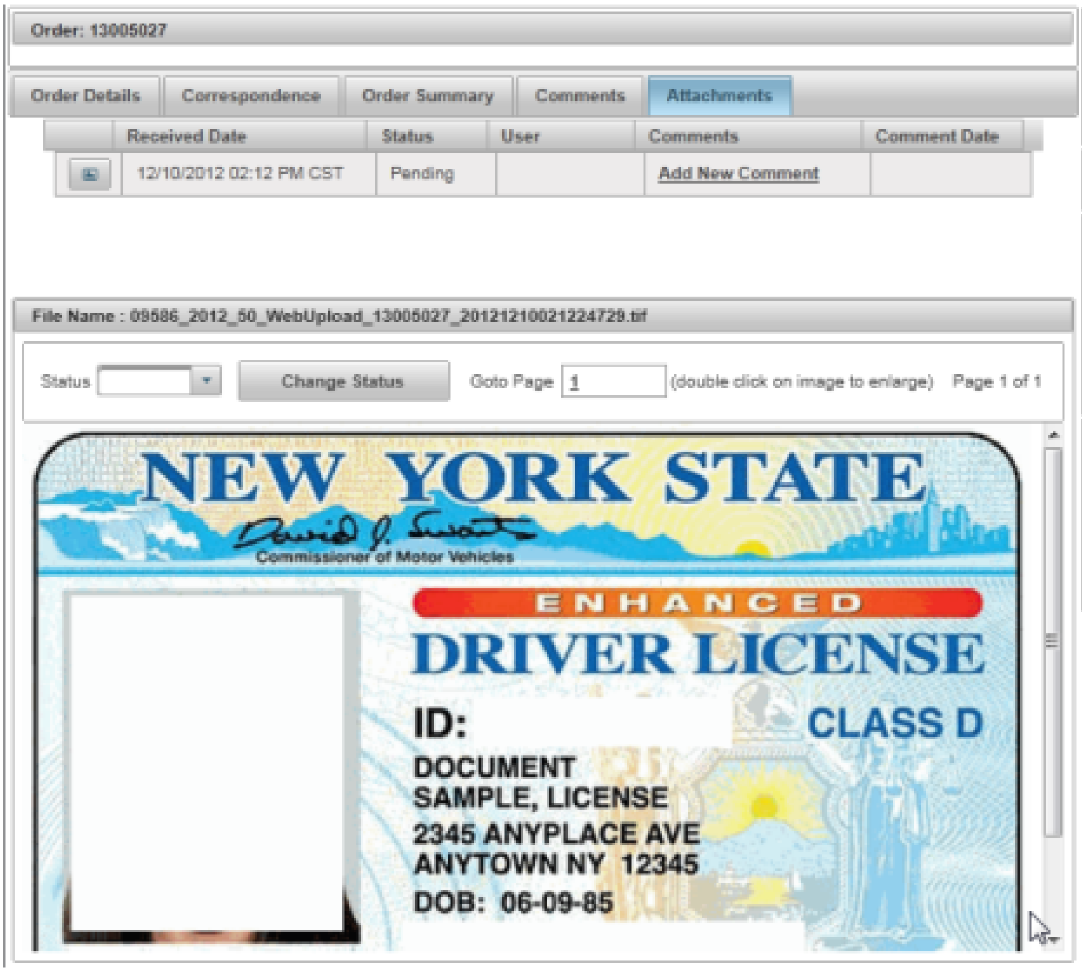
Step 3 Full text comment will be displayed in the **Full Comment Text** box



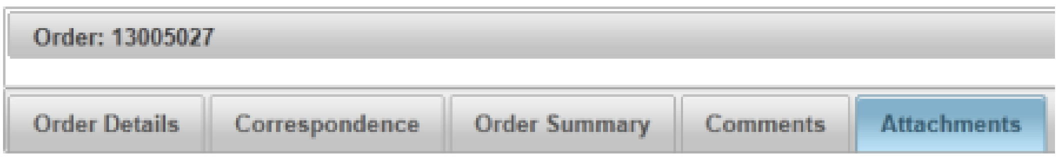
35 How to View Attachments

How to View Attachments

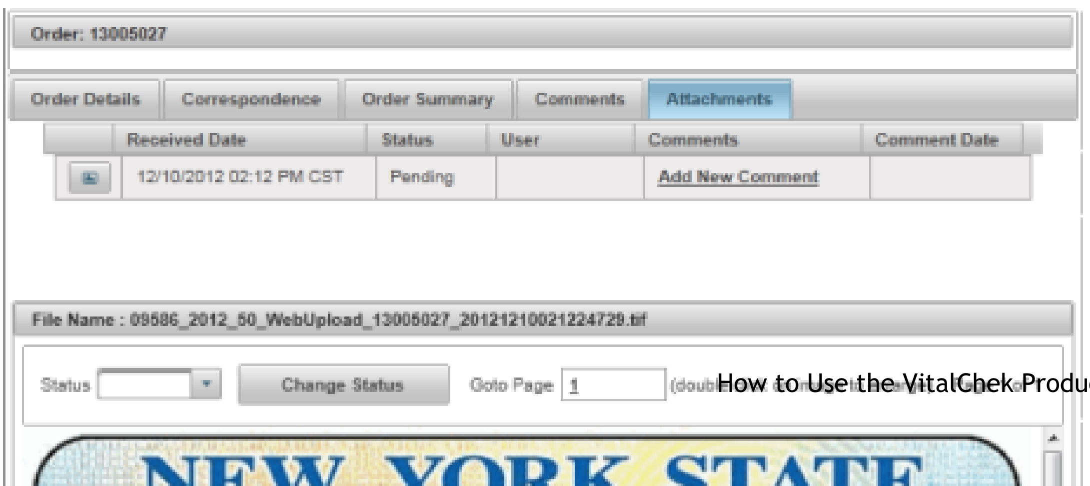
The **Attachments** tab contains images that have been attached to the order, i.e. identification verification and entitlement documents.



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



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



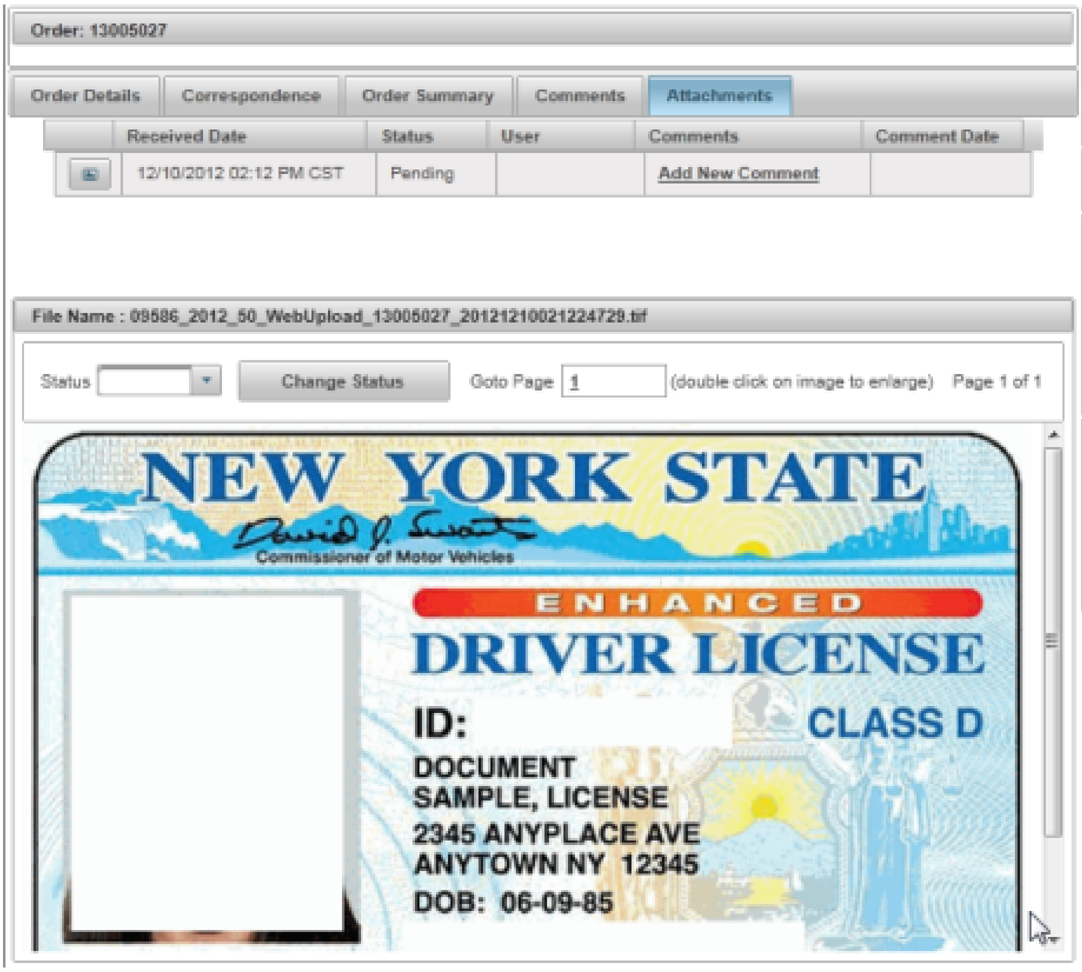
Step 3 Double click on the image

Step 4 Image will be enlarged and displayed in separate window

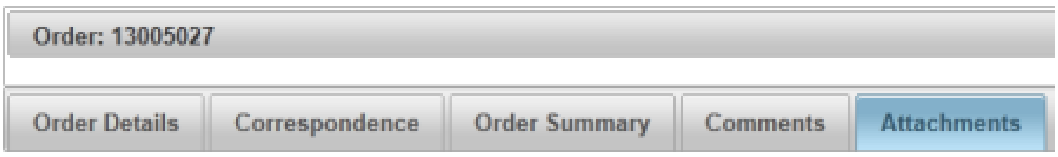
36 How to Comment on Attachments

How to Comment on Attachments

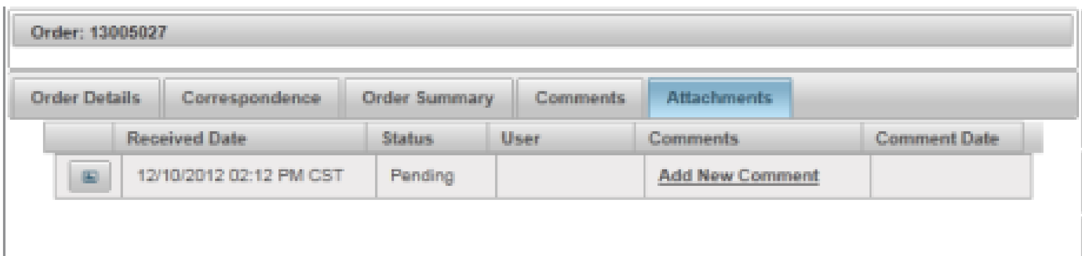
The **Attachments** tab contains images that have been attached to the order, i.e. identification verification and entitlement documents.



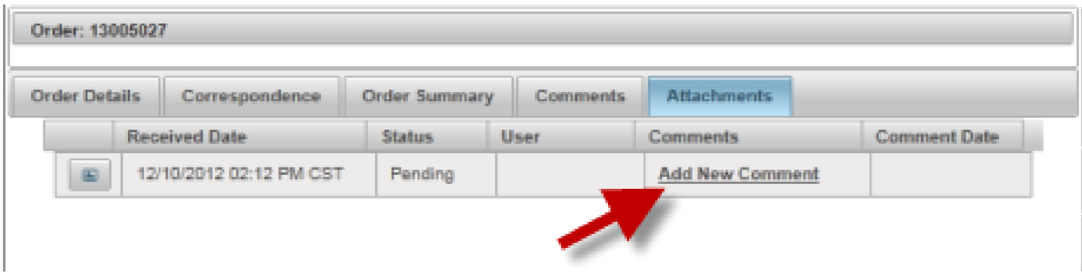
Step 1 When viewing the order, select **Attachments** tab.



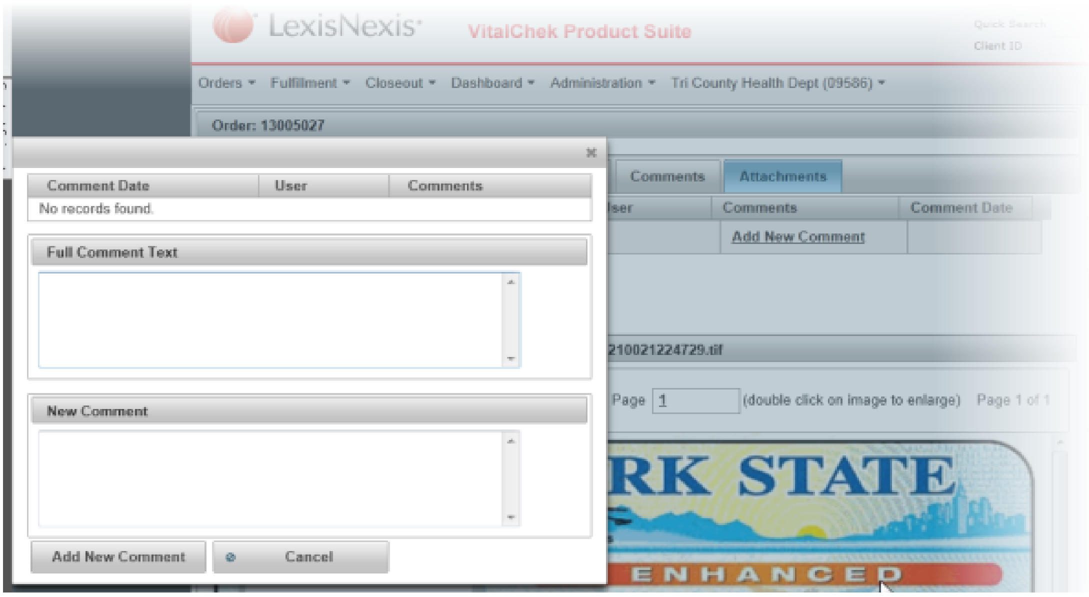
Step 2 Images that have been attached to the order will be displayed



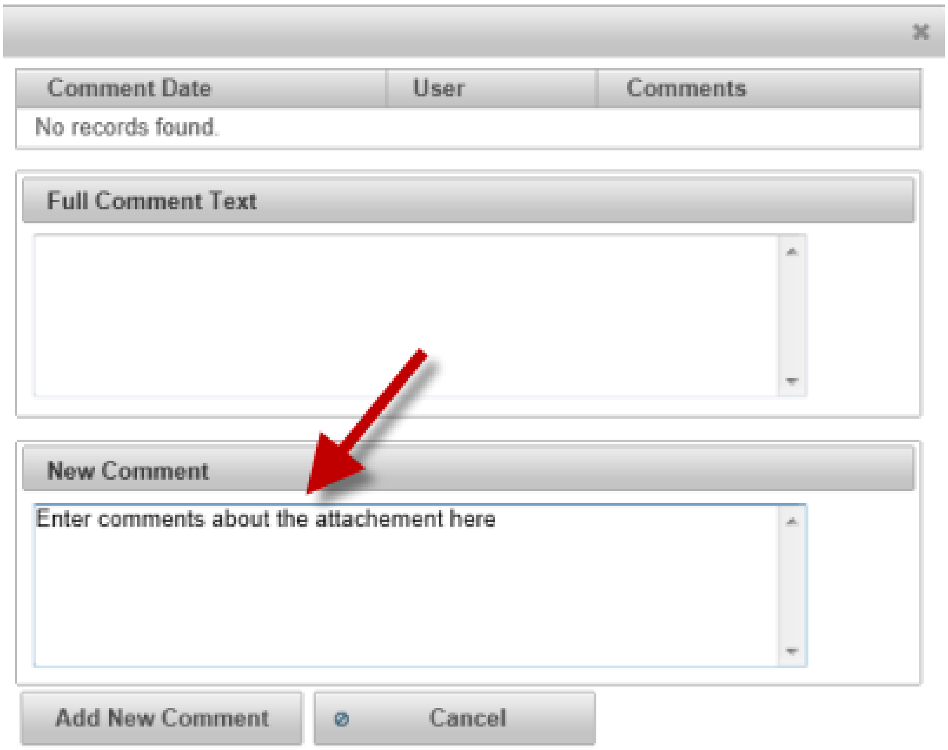
Step 3 Click **Add New Comment** link



Step 4 Comment box will display



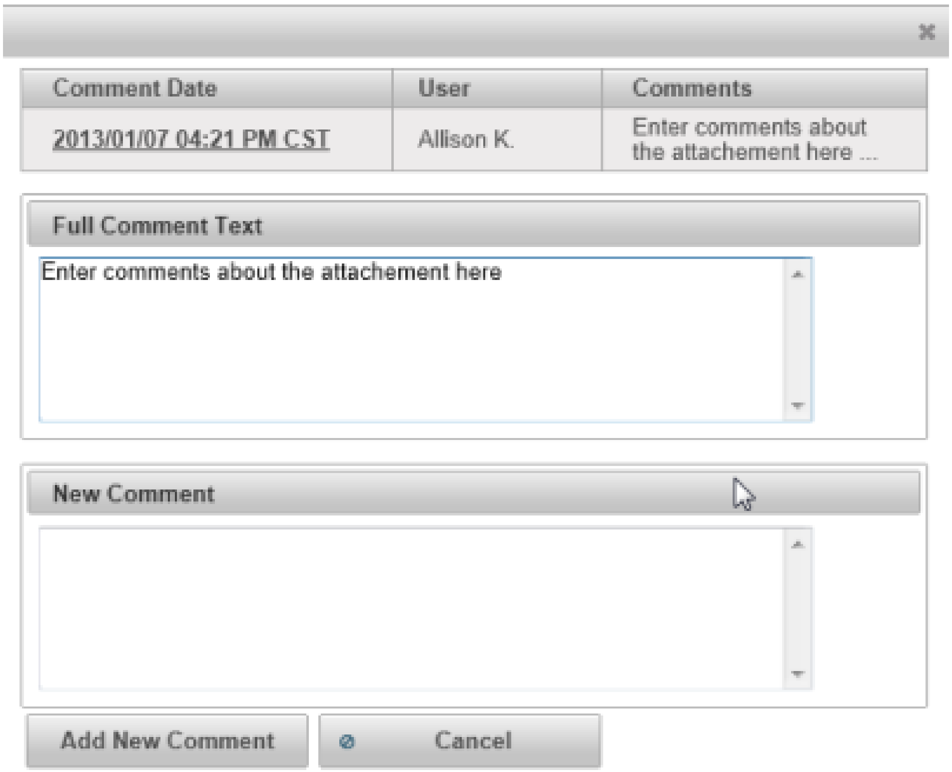
Step 5 Enter comment in **Add New Comment** box



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

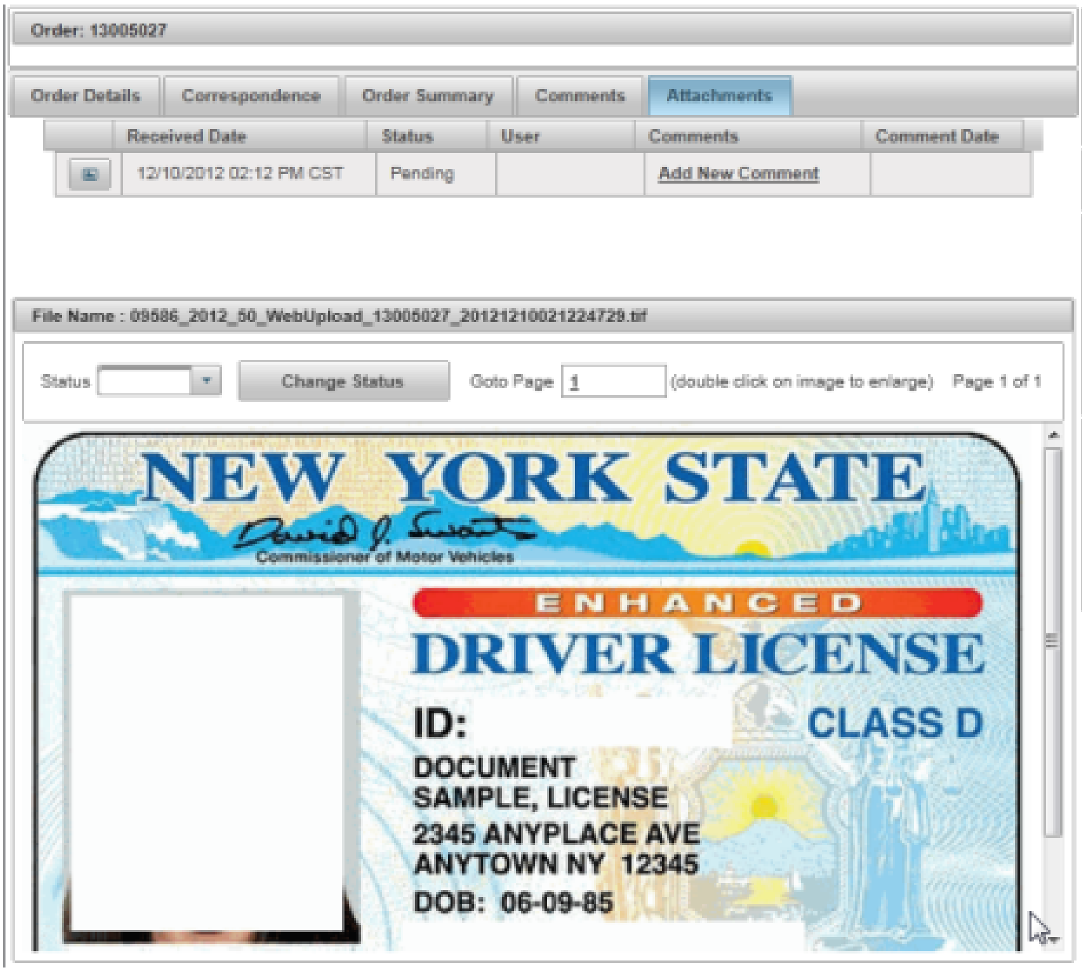
Step 8 Full Comment Text is displayed



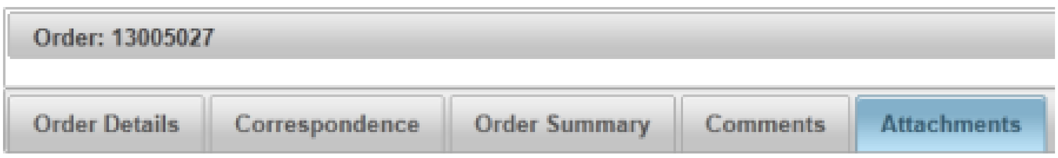
37 How to Change the Status of an Attached Image

How to Change the Status of an Attached Image

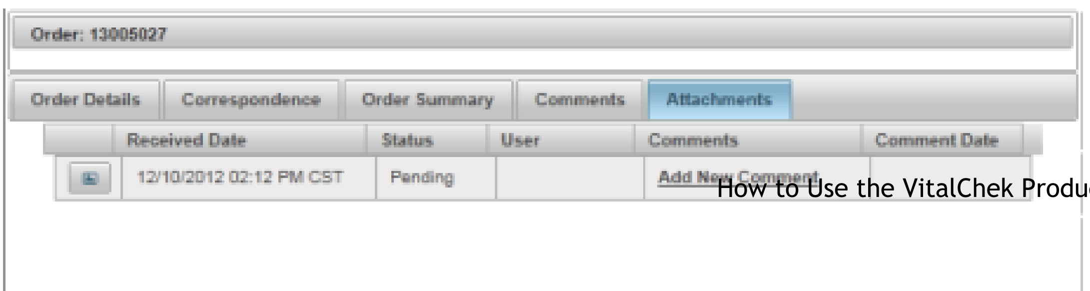
Identification verification and entitlement documents that have been uploaded to an order via the web will be visible in the attachments tab.



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)**)



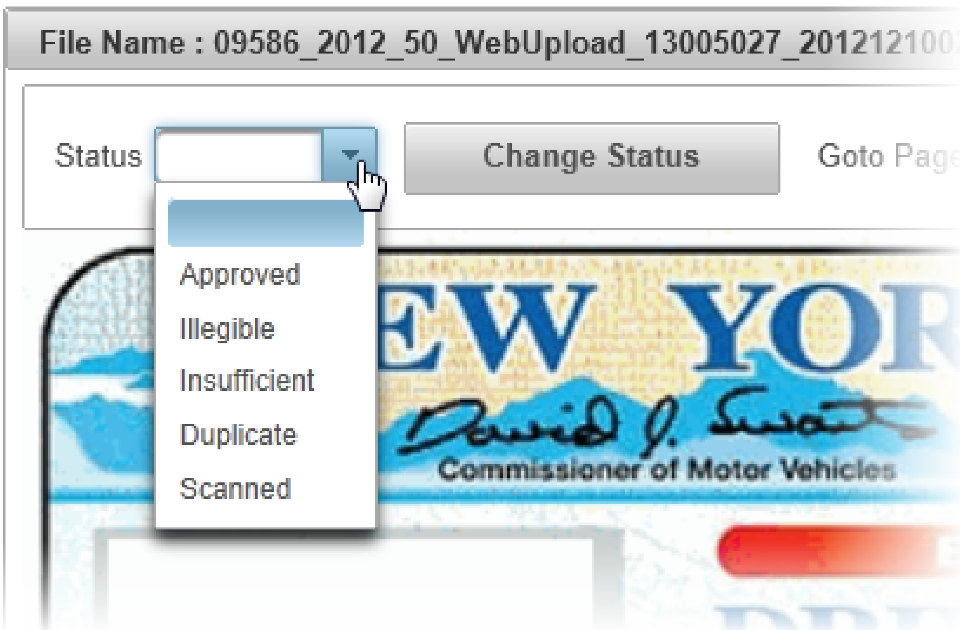
Step 2 Images that have been attached to the order will be displayed



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

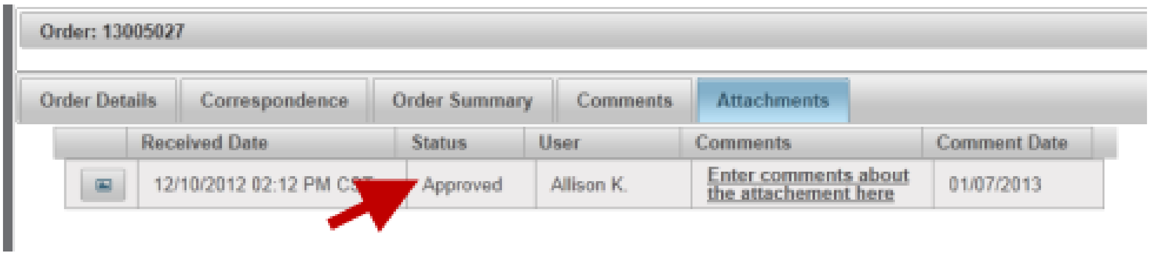
Step 4 Image will be enlarged and displayed in separate window. Click **Next** to view next image

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

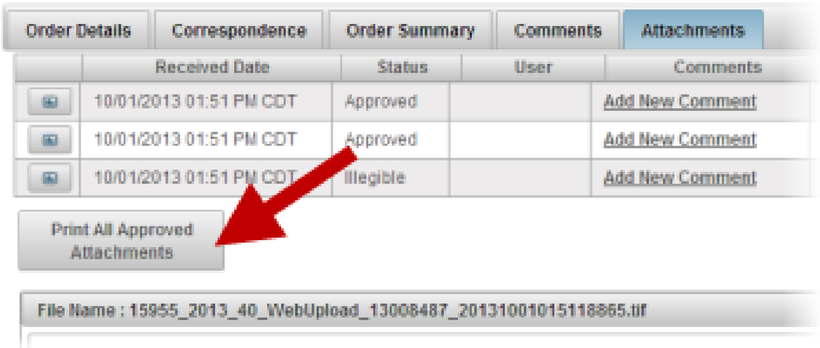


Step 6 Once a Status has been selected, the **Change Status** button will be visible

Step 7 Image Status changes



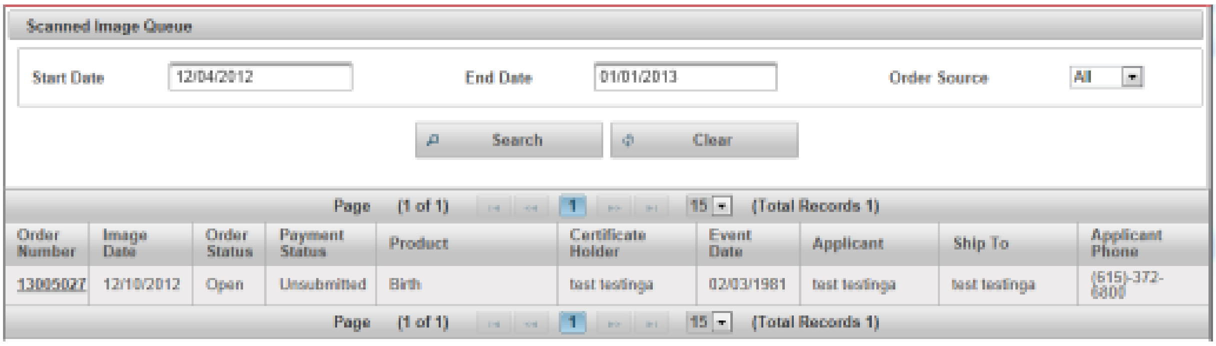
Note - once (1 or more) images have been approved, the **Print All Approved Attachments** button displays. See **How to Print All Approved Images (on-line documentation)**



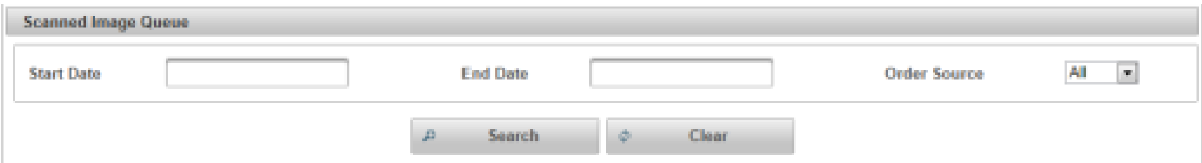
38 How to View Orders in the Scanned Image Queue

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.



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

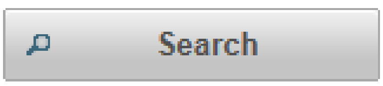


Step 2 Enter a **Start Date**, or the date to begin searching for images

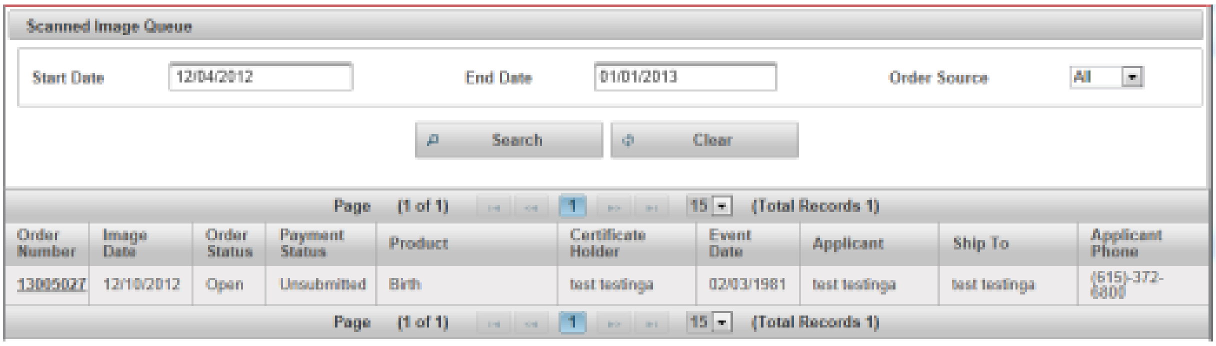
Step 3 Enter an **End Date**, or the date to search up until

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.

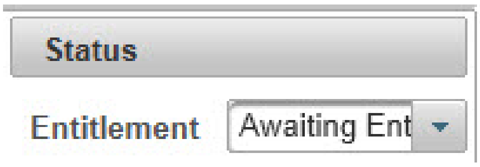


39 How to Change the Entitlement Status

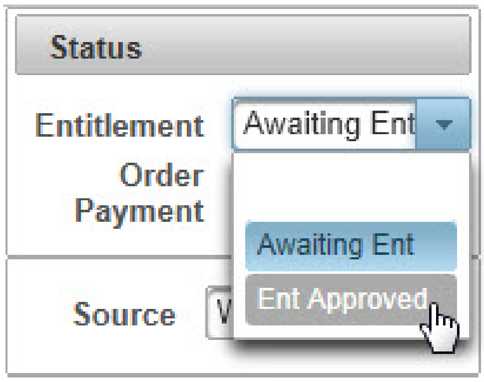
How to Change the Entitlement Status

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

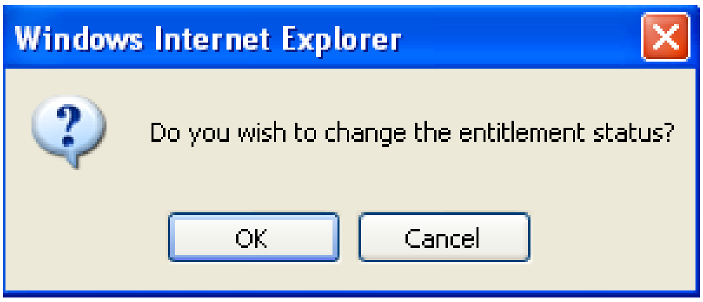
Step 1 **Awaiting Ent** status is displayed in the **Entitlement Status** section



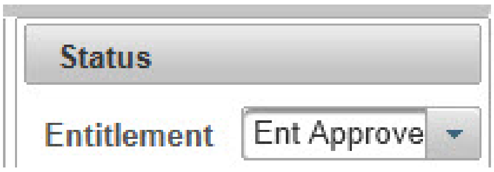
Step 2 Select approval status (per Agency) from Entitlement Status drop down selection



Step 3 Confirmation message appears. Click OK



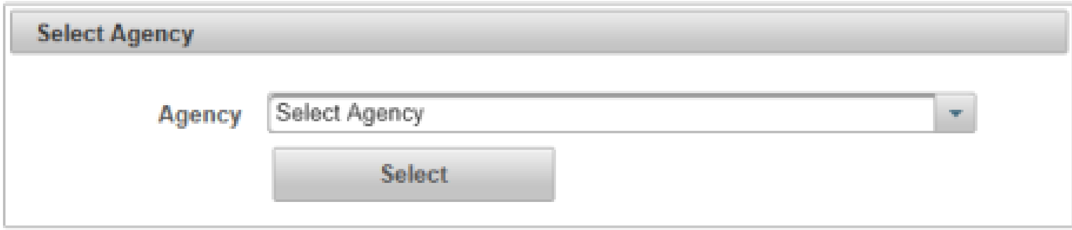
Step 4 **Entitlement** status is changed


Status
Entitlement
Ent Approve

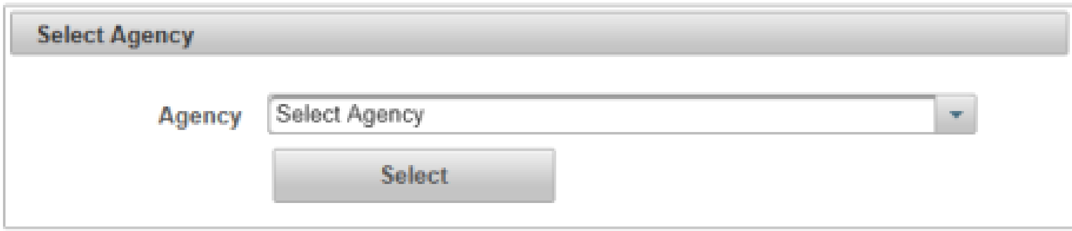
40 How to Select an Agency

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 that one Agency will see the **Select Agency** screen after login.



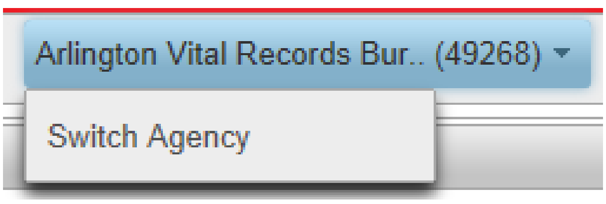
Step 2 Using the drop down arrow, select from available Agencies

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

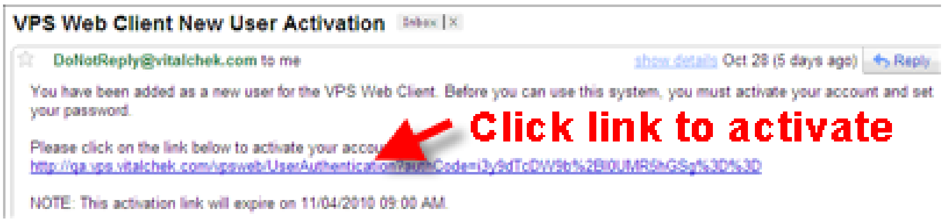

Select Agency
Agency
Select Agency
Select

41 How to Create a New Password

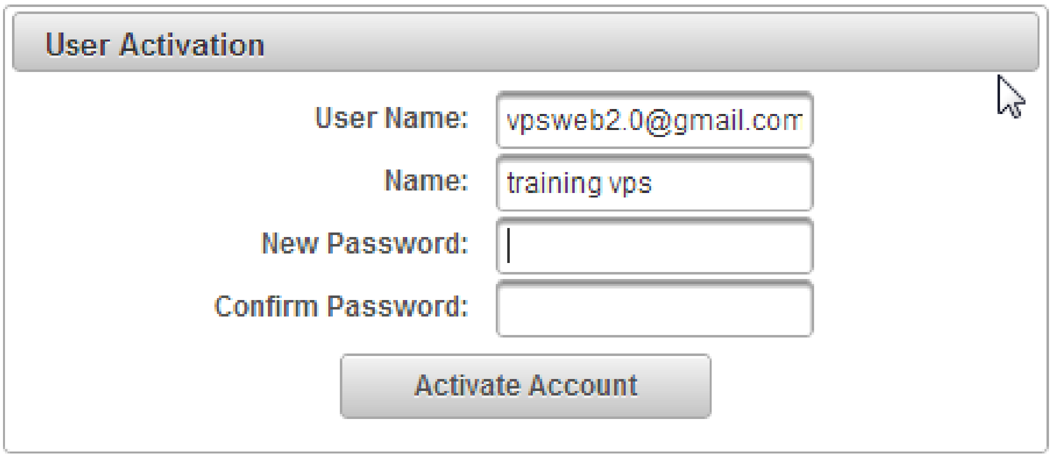
Password Rules	• Password must be at least 8 characters, and no more than 20 • Password must be at least one upper and one lower case character • Password must contain at least one numeral, and cannot start with a numeral

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

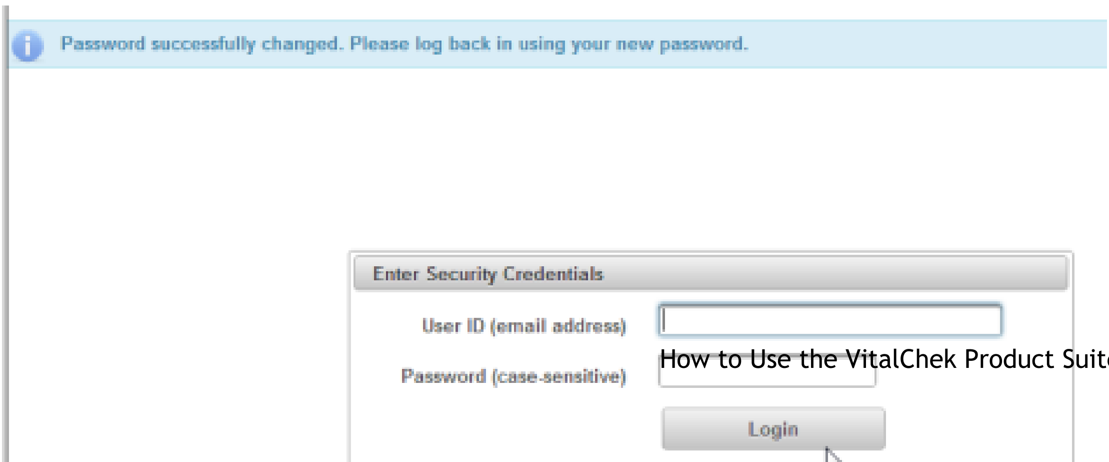


Step 4 Enter **New Password** using Password Rules

Step 5 **Confirm New Password**

Step 6 Click **Activate Account**

Step 7 **Password successfully changed** screen displays

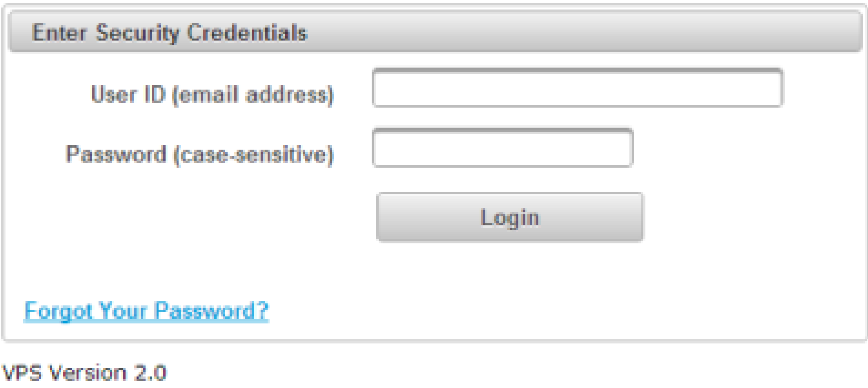


Step 8	Enter **User ID** and **Password** to login

42 How to Reset a Forgotten Password

How to Reset a Forgotten Password

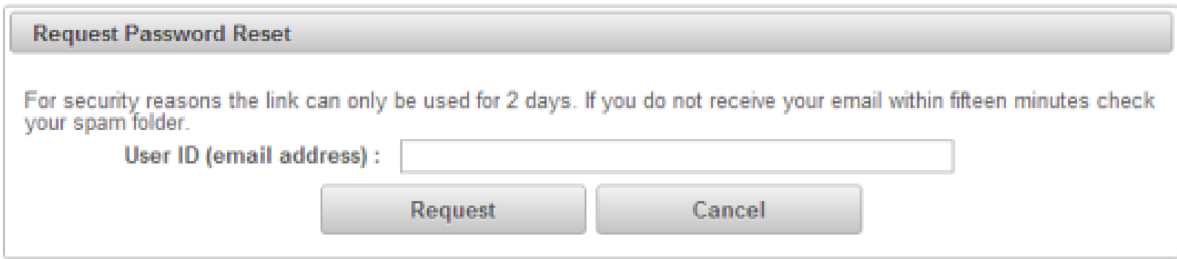
Upon entering VitalChek Product Suite, the User will be presented with a **Enter Security Credentials** login page



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

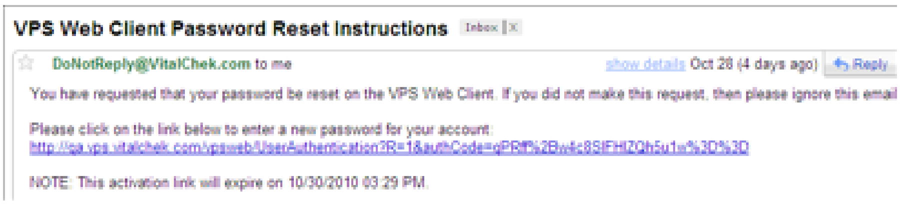


Step 4 Enter **User ID** (email address) if not prepopulated from login page.

Step 5 Click **Request** button

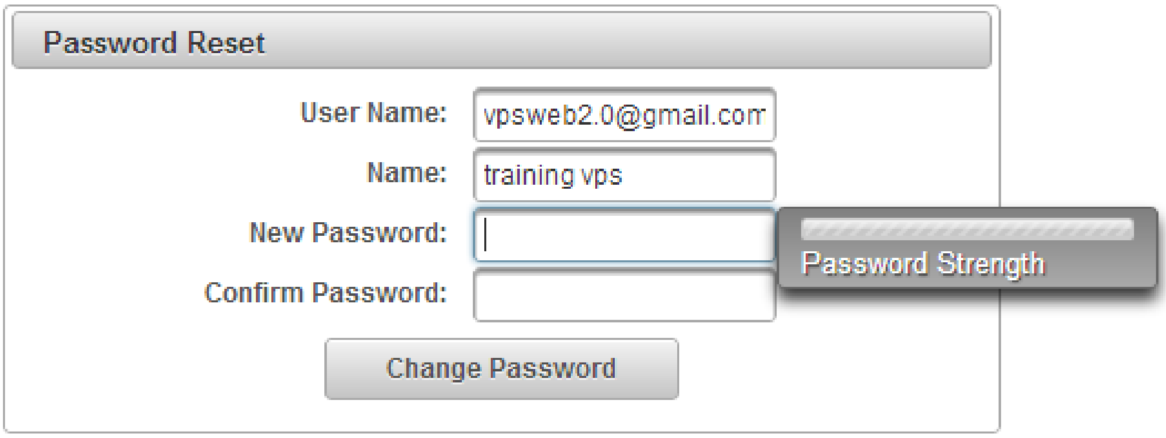
Step 6 Email confirmation message appears

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



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

8



Step 9 Enter a **New Password**

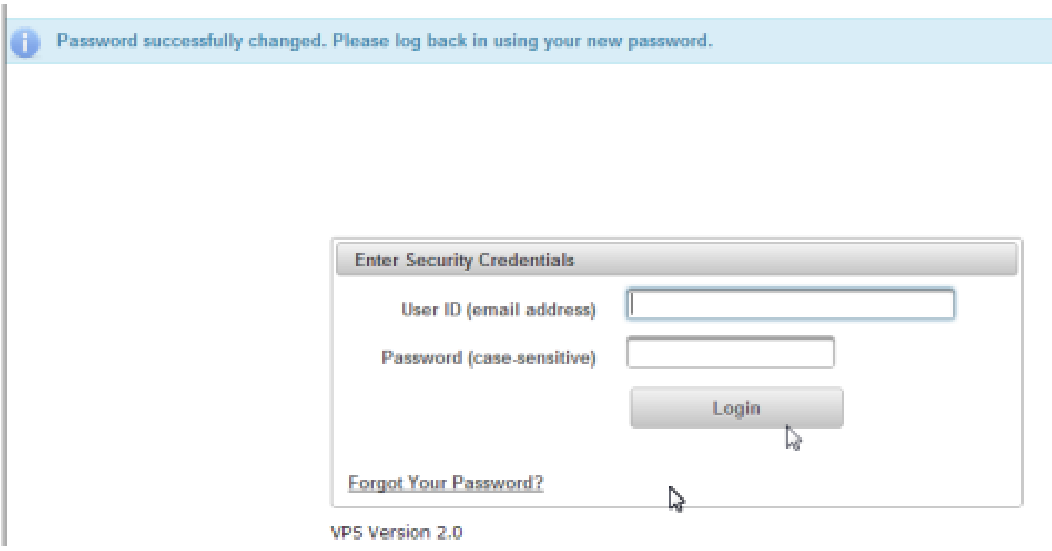
*Note: Password Strength indicator displays weak-good-strong based on password selection. See **How to Create a New Password (Section 41)** for Password Rules*

Step 10 Confirm **New Password**

Step 11 Click **Change Password** button

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

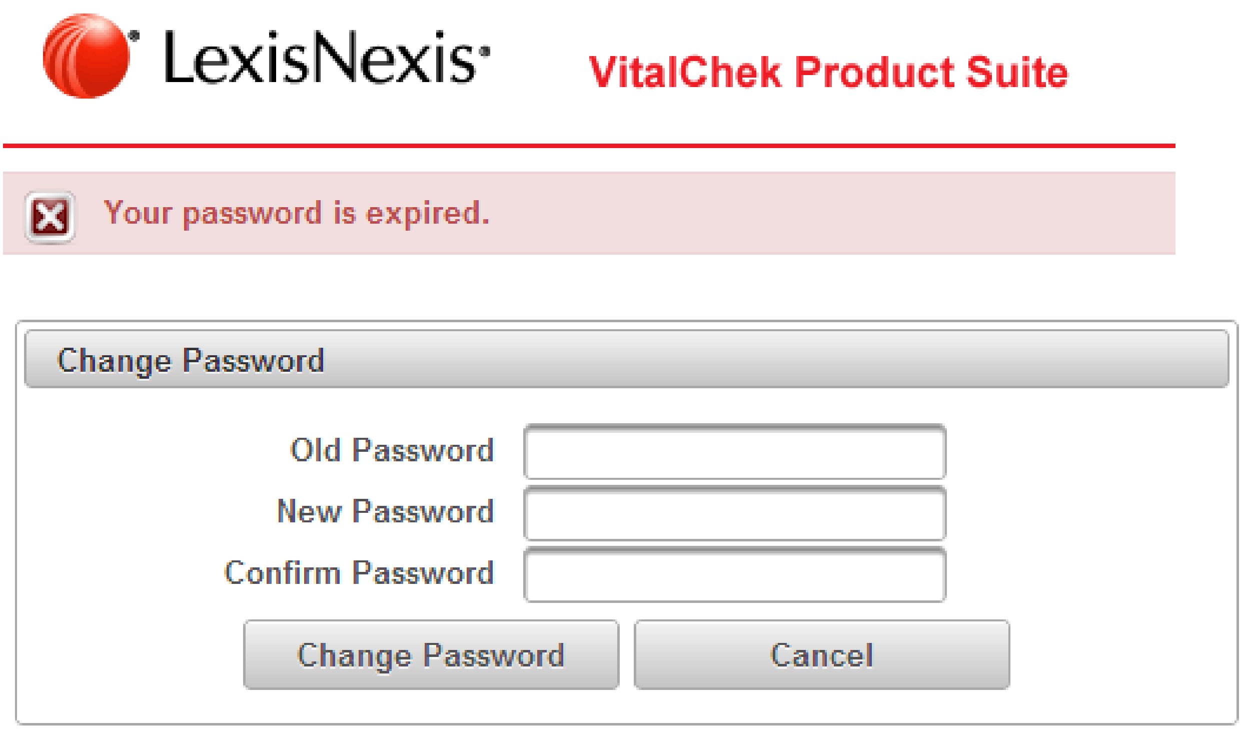
Step 13 Enter **User ID** and new **Password** to login



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.



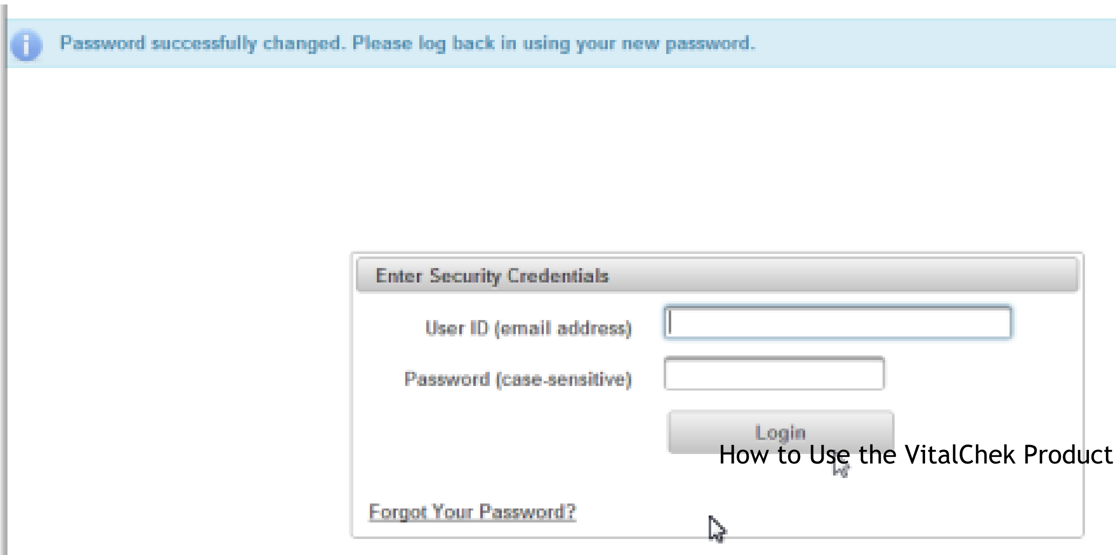
Step 1 Enter **Old Password**

Step 2 Enter a **New Password**

Step 3 Enter new password again in **Confirm Password**

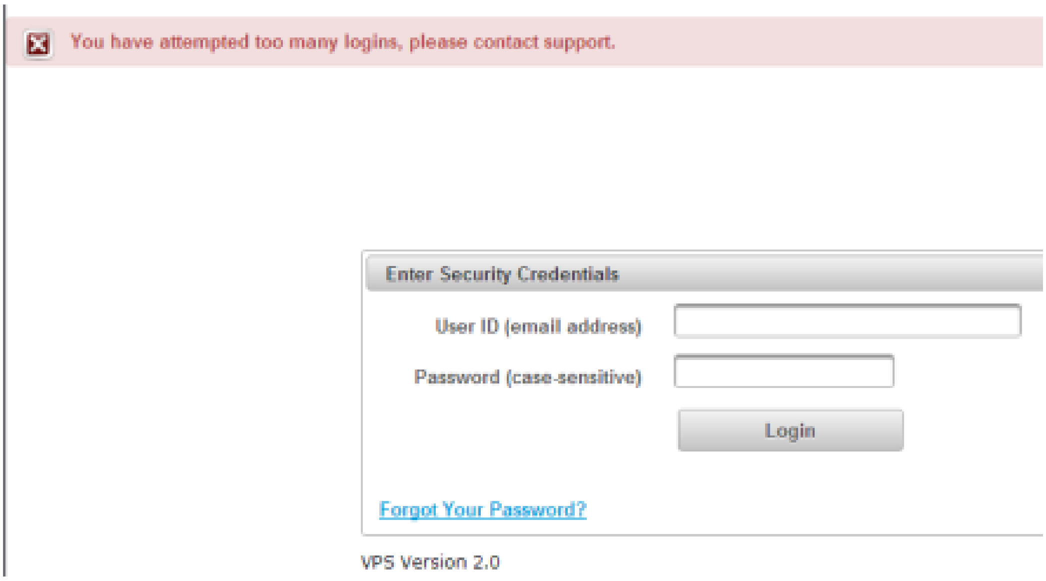
Step 4 Click **Change Password** button

Step 6 User is returned to login screen; Password successfully changed message displayed



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.

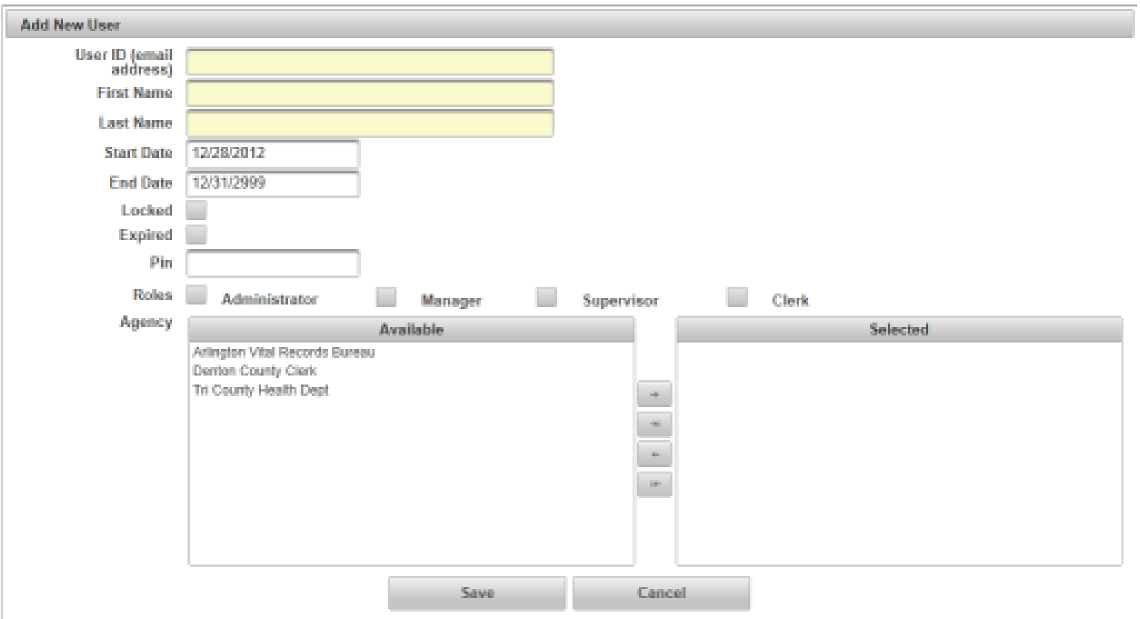


45 How to Add New Users

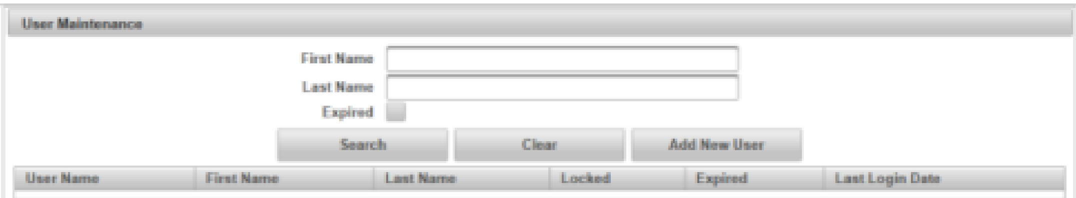
How to Add New Users

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.

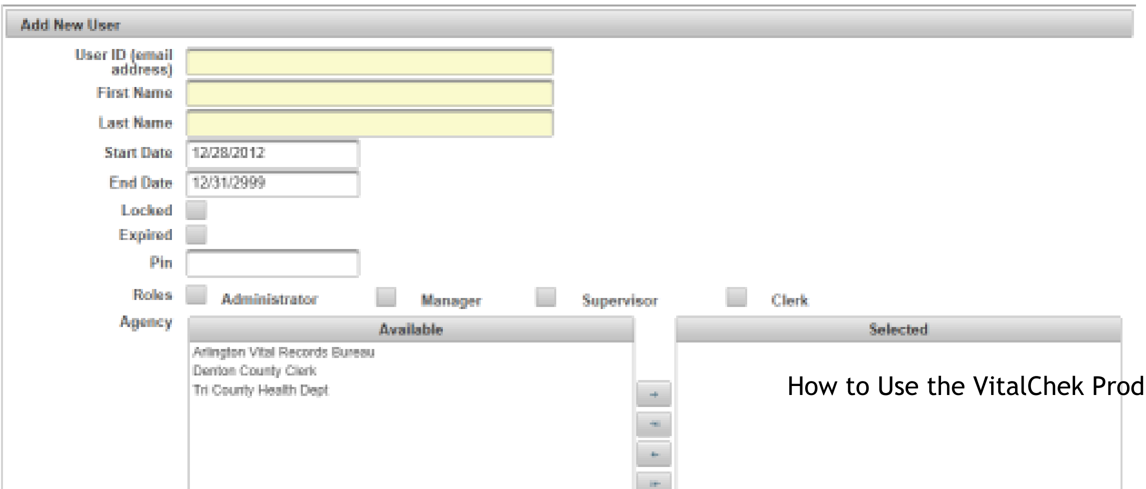


Step 1 From the Administration menu, select User Maintenance. User Maintenance screen is displayed

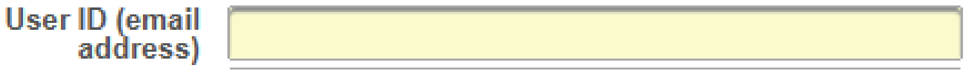


Step 2 Click Add New User button

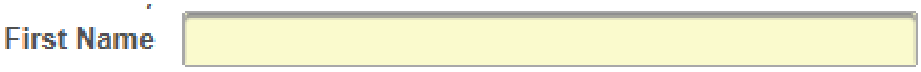
Step 3 Add New User screen in displayed. Required fields are highlighted yellow



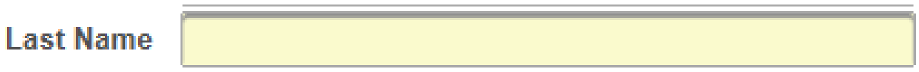
Step 4 Enter User ID; must be a valid email address



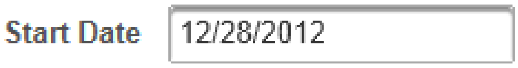
Step 5 Enter User's First Name



Step 6 Enter User's Last Name



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



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

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

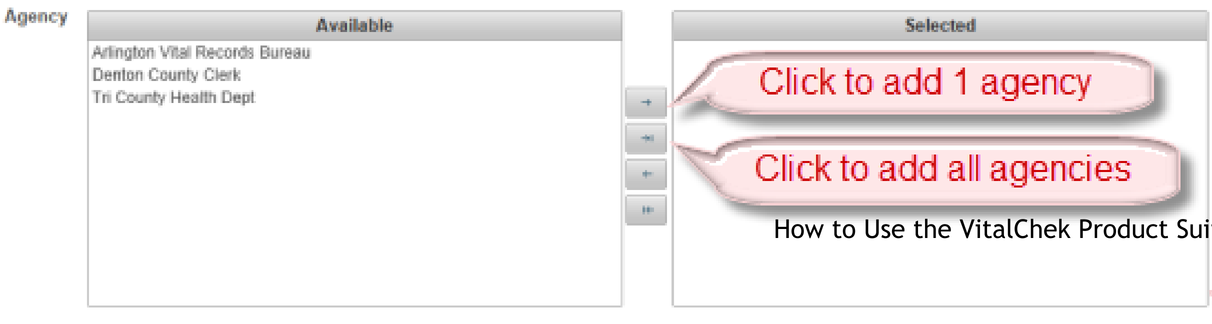
Step 8 Select a Role for the User by checking the box(es) next to the role. When choosing a role, determine what functions the user will perform in the agency. A User may have an Administrator role along with ***one*** other role (Manager-Supervisor-Clerk).

- 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.

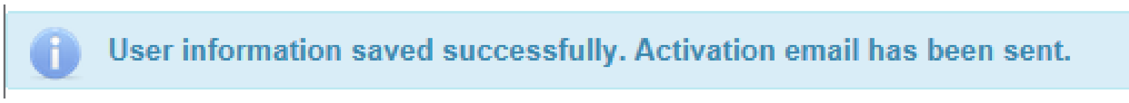
To add to all Agencies displayed, click the Add All  button.



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

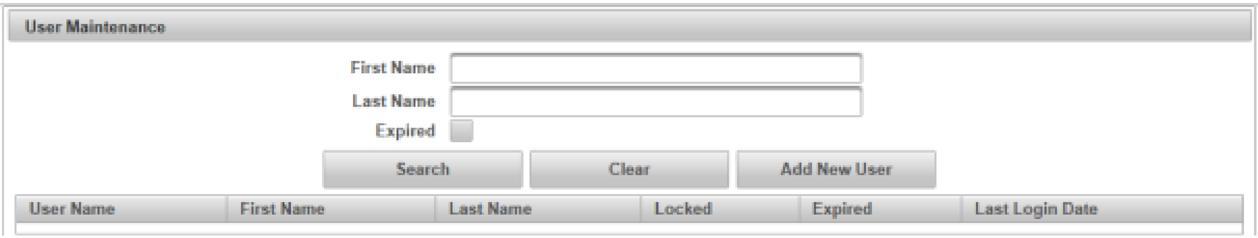


46 How to Search for Users

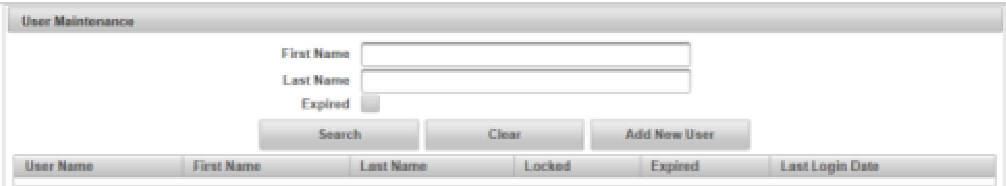
How to Search for Users

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

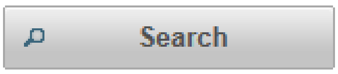


Step 2 Enter (at least) first letter of **First Name** of User

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

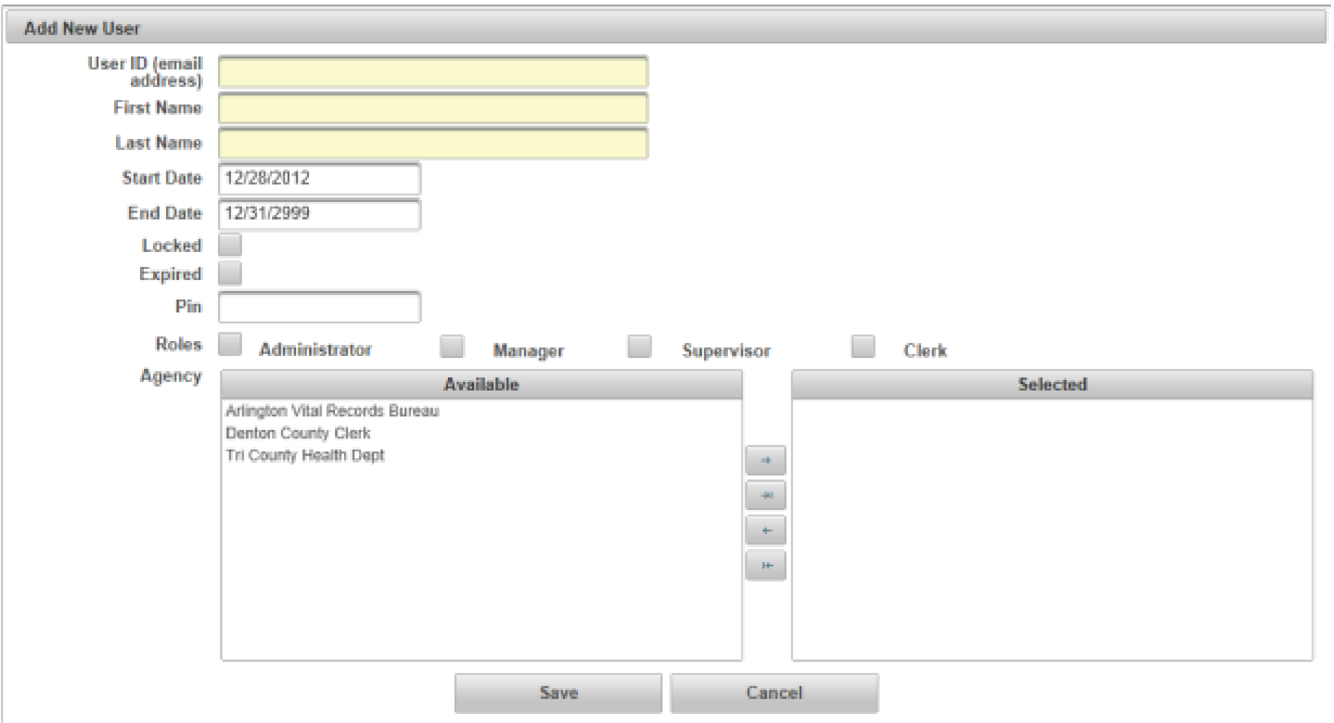
Step 7 **Edit User** screen displays

47 How to Reset a User's Password

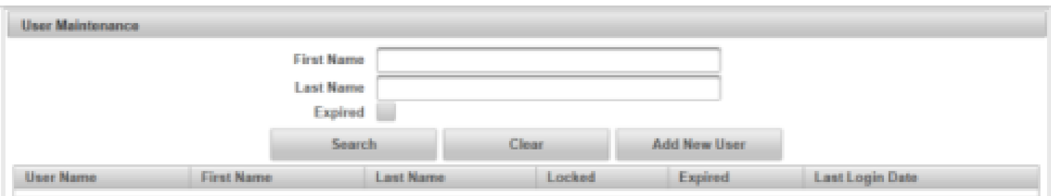
How to Reset a Users Password

Administrators are able to reset user's passwords.

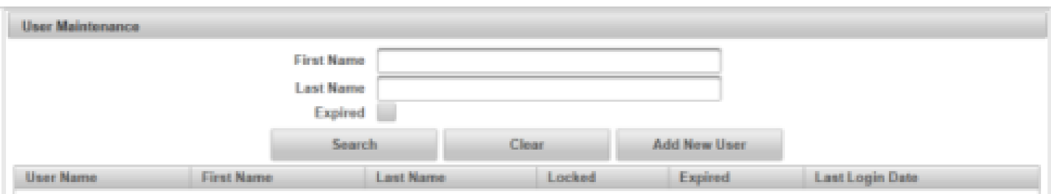
Users must have a role of **Administrator** to be able to view and access **Administration** functions.



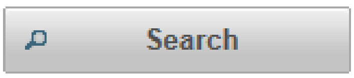
Step 1 From the **Administration** menu, select **User Maintenance. User Maintenance** screen is displayed



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

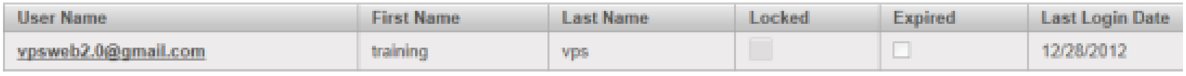


Step 3 Click **Search**



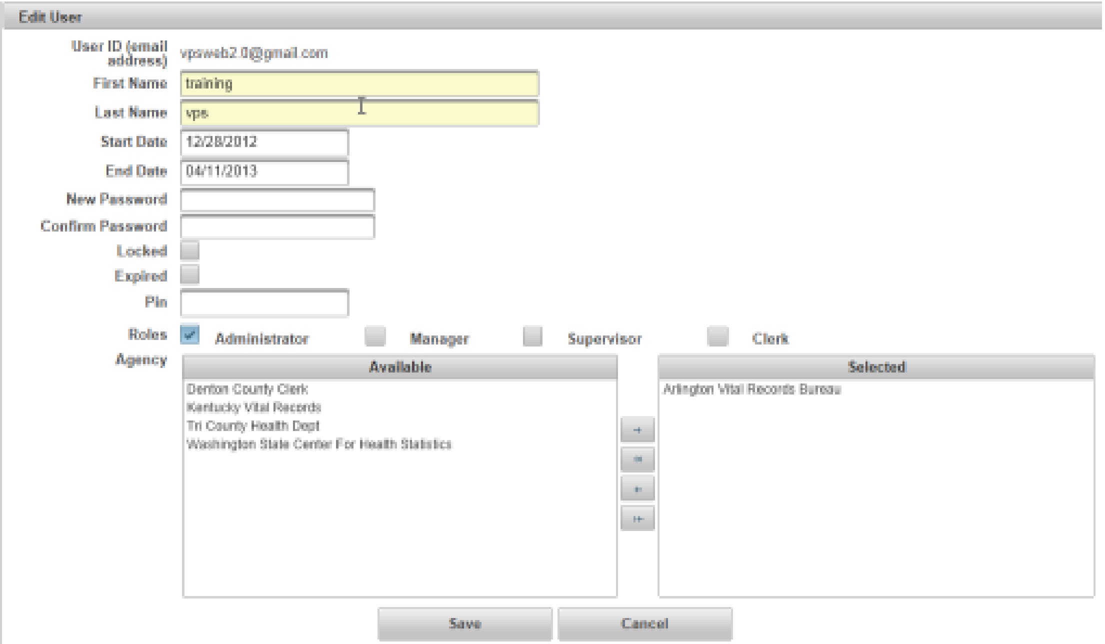
Step Search results are displayed. Click underlined **User Name** link

4



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

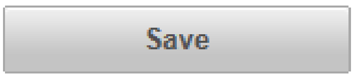
Step 5 **Edit User** screen is displayed



Step 6 Enter a **New Password**

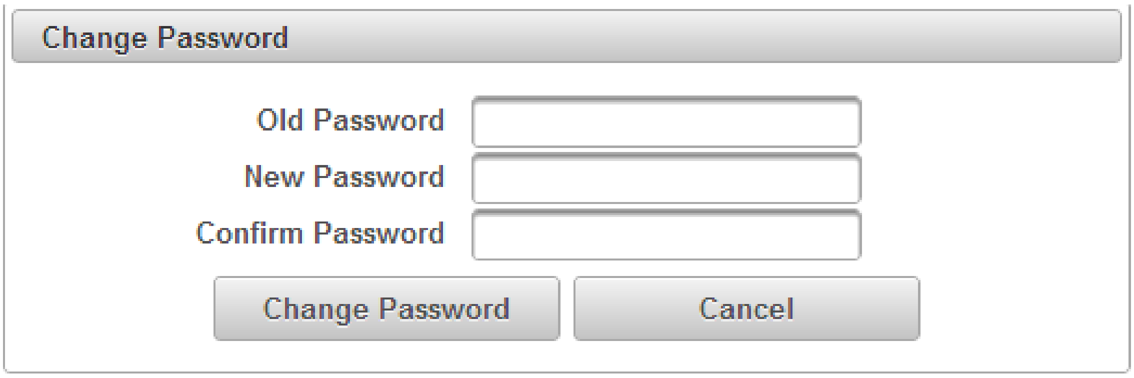
Step 9 Enter new password again in **Confirm Password** field

Step 10 Click **Save**



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

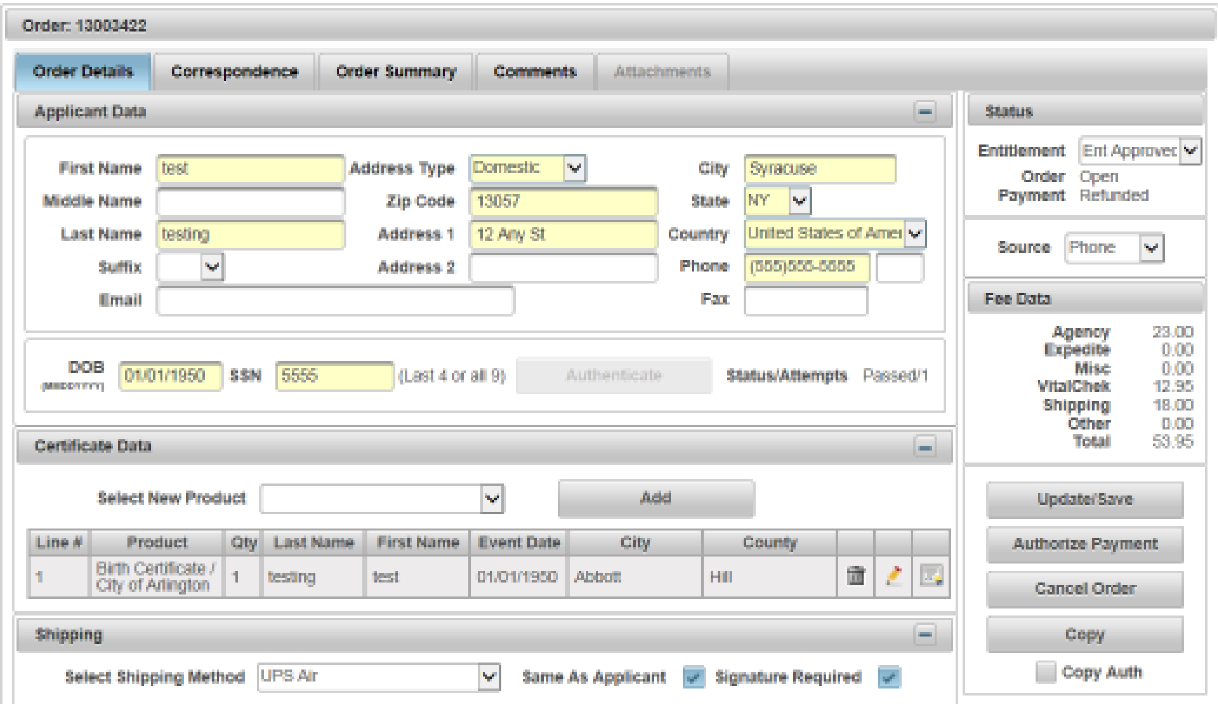
Step 12 When User logs into VPS, the **Change Password** screen will display


Change Password
Old Password
New Password
Confirm Password
Change Password
Cancel

48 How to Cancel an Order

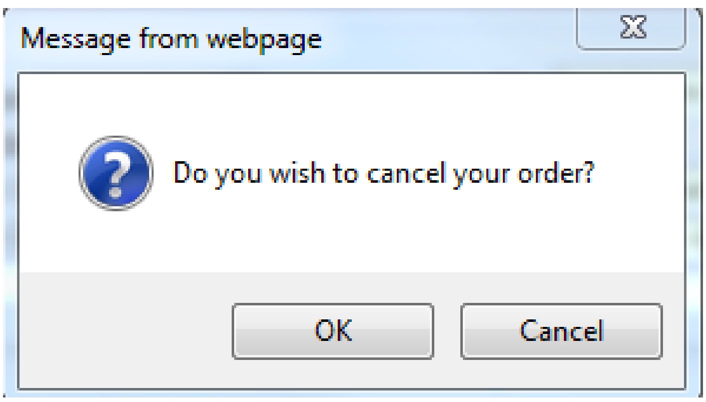
How to Cancel an Order	Orders can be cancelled at any time until they have been paid. Once an order has a paid-in-full status, the payment must be voided, and then the order can be cancelled.

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



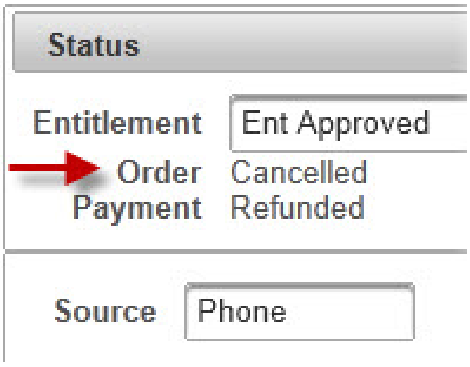
Step 2 Click the Cancel Order button

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



Step Order is cancelled and Order Status changes to Cancelled

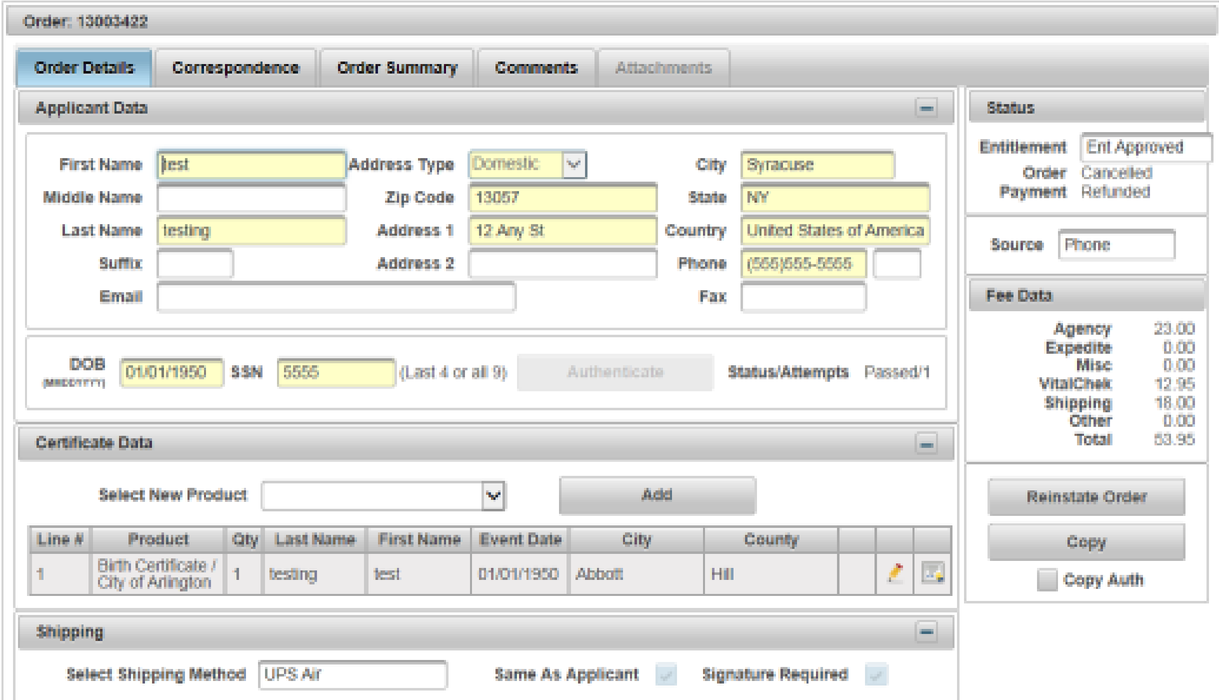
4


Status
Entitlement
Ent Approved
Order
Cancelled
Payment
Refunded
Source
Phone

49 How to Reinstate a Cancelled Order

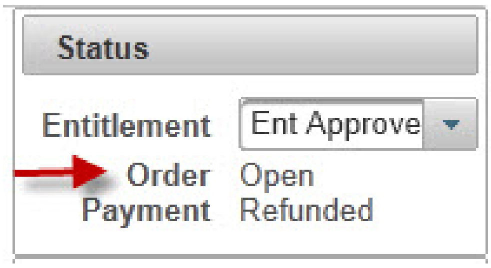
How to Reinstate a Cancelled Order	Orders that have been cancelled can be reinstated

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



Step 2 Click the Reinstate Order button

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



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

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

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

-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

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

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

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

Pin pad prompts customer to swipe card

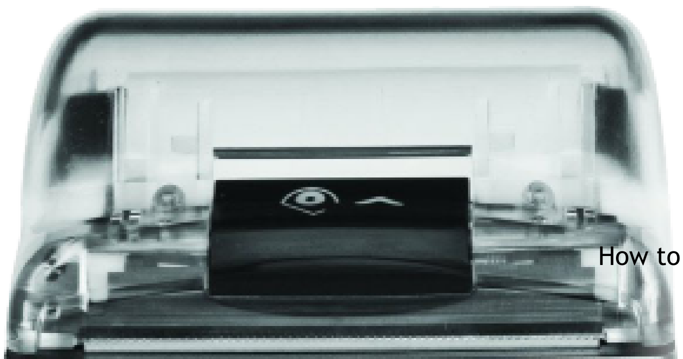
Note: If the card will not swipe (the magnetic strip is worn or damaged), after 3 bad swipes, you will be prompted to manually enter the card number, expiration date, CV2 Code and card billing address Zip Code by using the key pad on the terminal.

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

. 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 of does not have the authority for the transaction, an error message wiill be displayed

Step 2 **Select Operation** screen displays

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

Step 4 **VOID** screen displays

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

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

Agency Name
Agency Address
Agency City, State, Zip

MID:	999999
TID:	9999999999999
Terminal ID:	V9999999
Date / Time:	99/99/99 99:99 AM EDT
Confirmation #:	99999999
Card #:	************9999
Expiration:	##/##
Transaction Type:	Void - $13.52
Transaction Date:	99/99/99 99:99 PM EDT
Payment Type:	Credit
Card Type:	MasterCard
Approval Code:	999999

Product Name $11.02
12345

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

Total Fee: - $13.52

Cardholder Signature

X--

Merchant Copy

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

VISA VOID RECEIPT - Agency Copy

Agency Name
Agency Address
Agency City, State, Zip

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

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

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

Product Name $1.00
12345

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

Total Fee: - $3.50

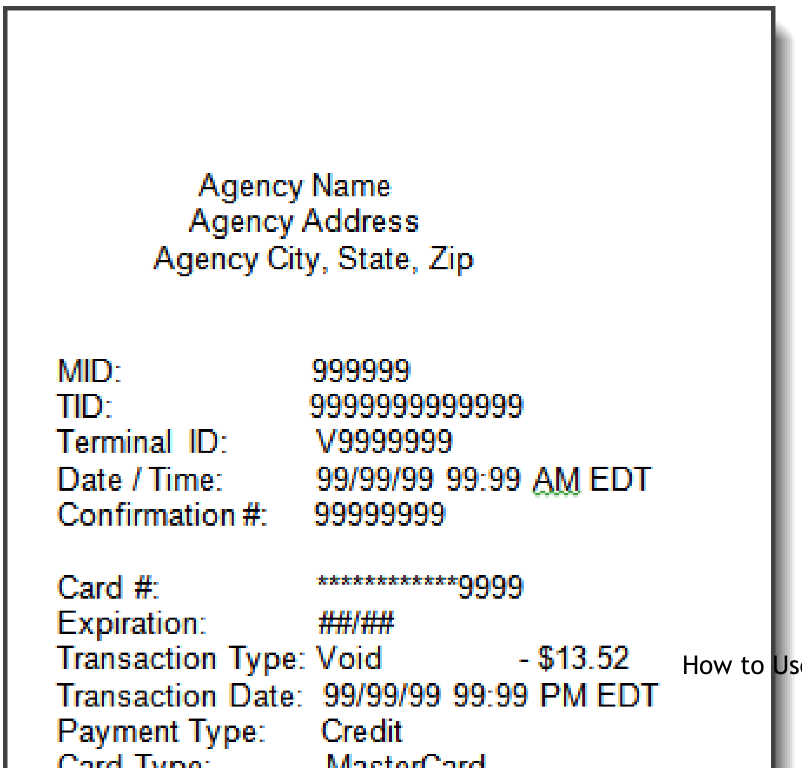
Cardholder Signature

X---

Merchant Copy

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

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



Agency Name
Agency Address
Agency City, State, Zip

MID:	999999
TID:	9999999999999
Terminal ID:	V9999999
Date / Time:	99/99/99 99:99 AM EDT
Confirmation #:	99999999
Card #:	************9999
Expiration:	##/##
Transaction Type:	Void - $13.52
Transaction Date:	99/99/99 99:99 PM EDT
Payment Type:	Credit
Card Type:	MasterCard

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

VISA VOID RECEIPT - Customer Copy

Agency Name
Agency Address
Agency City, State, Zip

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

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

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

Product Name	$1.00
12345	

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

Customer Copy

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 of does not have the authority for the transaction, an error message wiill be displayed

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

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

Step 4 The Agency Receipt will automatically print

Agency Name
Agency Address
Agency City, State, Zip

MID:	999999
TID:	9999999999999
Terminal ID:	V9999999
Date / Time:	99/99/99 99:99 AM EDT
Confirmation #:	99999999
Card #:	************9999
Expiration:	##/##
Transaction Type:	
Payment/Purchase/Sale	$13.52
Transaction Date:	99/99/99 99:99 PM EDT
Payment Type:	Credit
Card Type:	MasterCard
Approval Code:	999999
Product Name	$11.02
12345	
Agency Amount:	$11.02
LexisNexis Service Fee:	$2.50
Total Fee:	$13.52

Cardholder Signature

X---

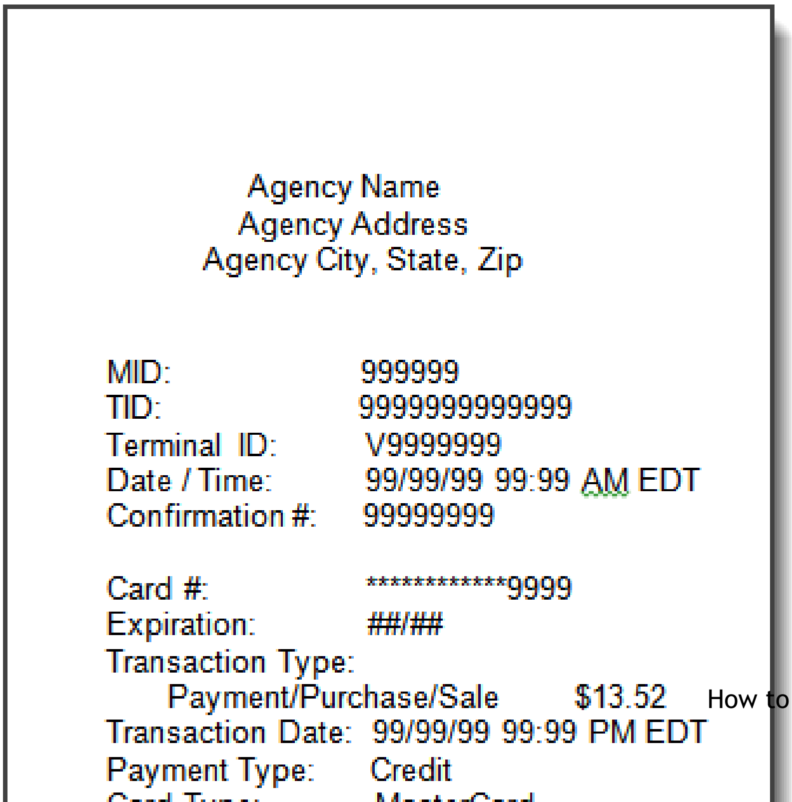
Merchant Copy

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

Agency Name
Agency Address
Agency City, State, Zip

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

Step 6 Customer receipt prints



Agency Name
Agency Address
Agency City, State, Zip

MID:	999999
TID:	9999999999999
Terminal ID:	V9999999
Date / Time:	99/99/99 99:99 AM EDT
Confirmation #:	99999999
Card #:	************9999
Expiration:	##/##
Transaction Type:	
Payment/Purchase/Sale	$13.52
Transaction Date:	99/99/99 99:99 PM EDT
Payment Type:	Credit

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

Agency Name
Agency Address
Agency City, State, Zip

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

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

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

Product Name $1.00
12345

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

Customer Copy

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 botton of the roll and toward the front of the terminal then place into the paper roll cradle
Step 3	Close the printer cover making sure the leading edge of the paper remains on the outside, and that the lid has snapped down securely

Problem - No receipt tape is available.

The user will still be able to process transactions, however an error message will be received when the receipt attempts to print. 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

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

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

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

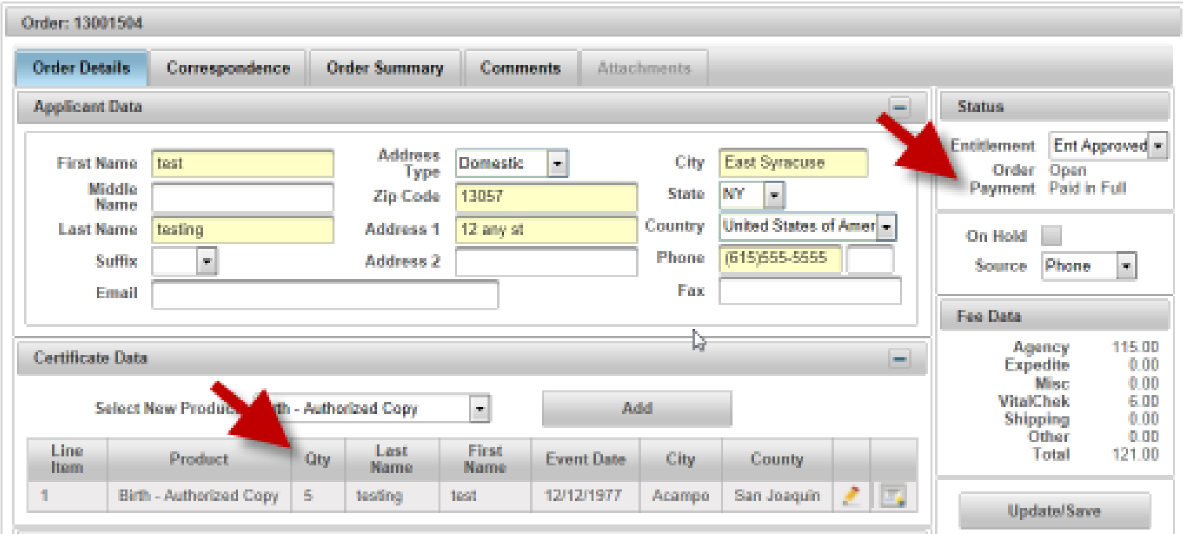
When an order:

- Is paid in full
- Has multiple copies
- The record is not able to be located

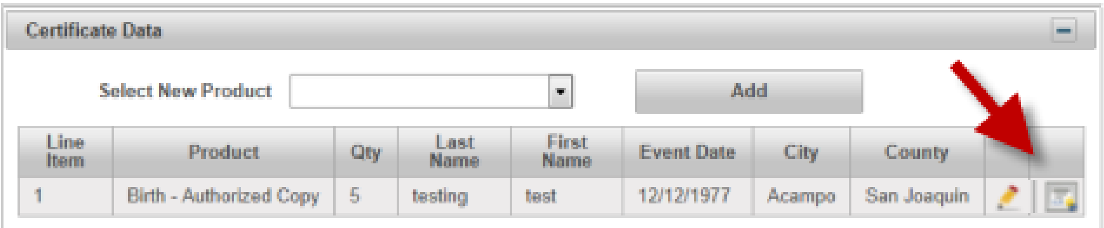
a search fee will be charged.

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

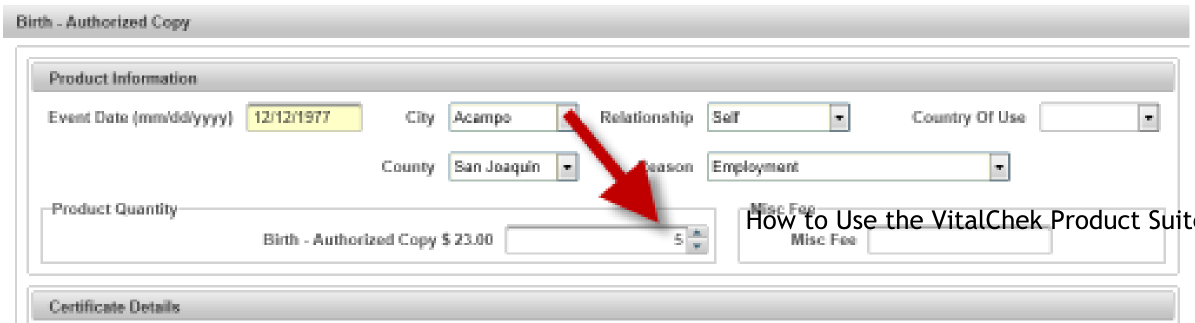
Note - Order must have multiple copies and a ***Paid in Full*** *Payment Status.*



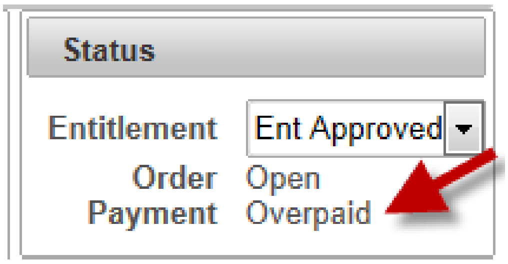
Step 2 Click the pencil icon to open the **Product Information** page to edit



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



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



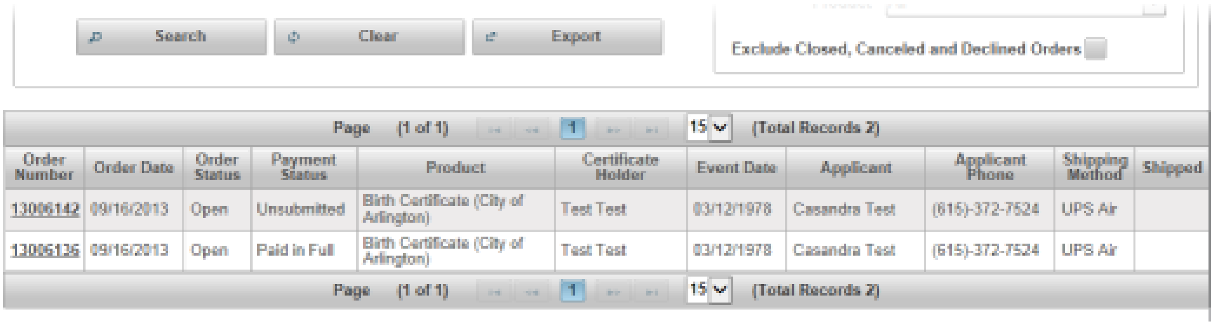
Note - when the agency completes Closeout, Agency will only be paid for 1 certificate order

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

63 How to Export Search Results

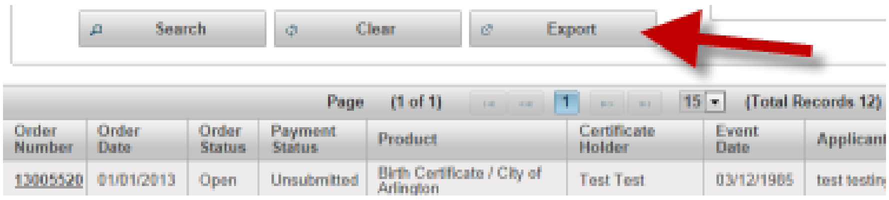
How to Export Search Results

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

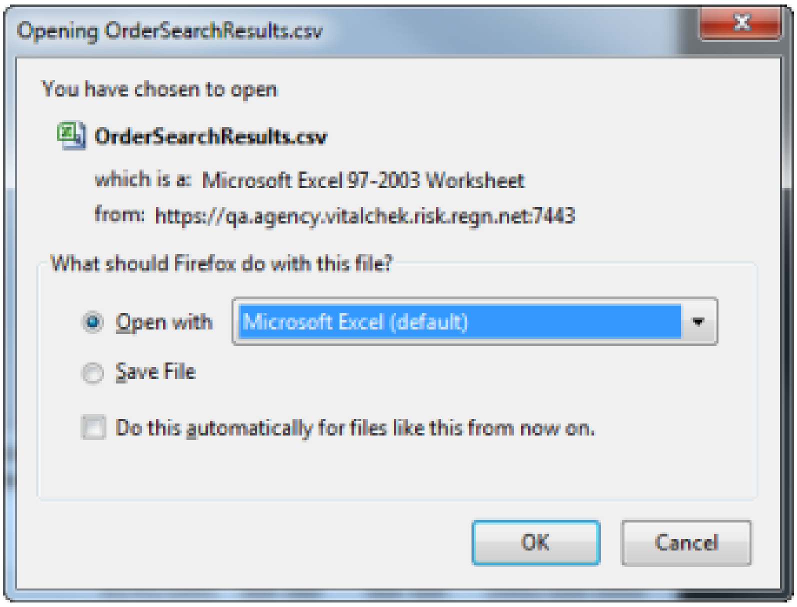


Note: To export search results when using Internet Explorer 9, please review **Accessing VPS (on-line documentation)**

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



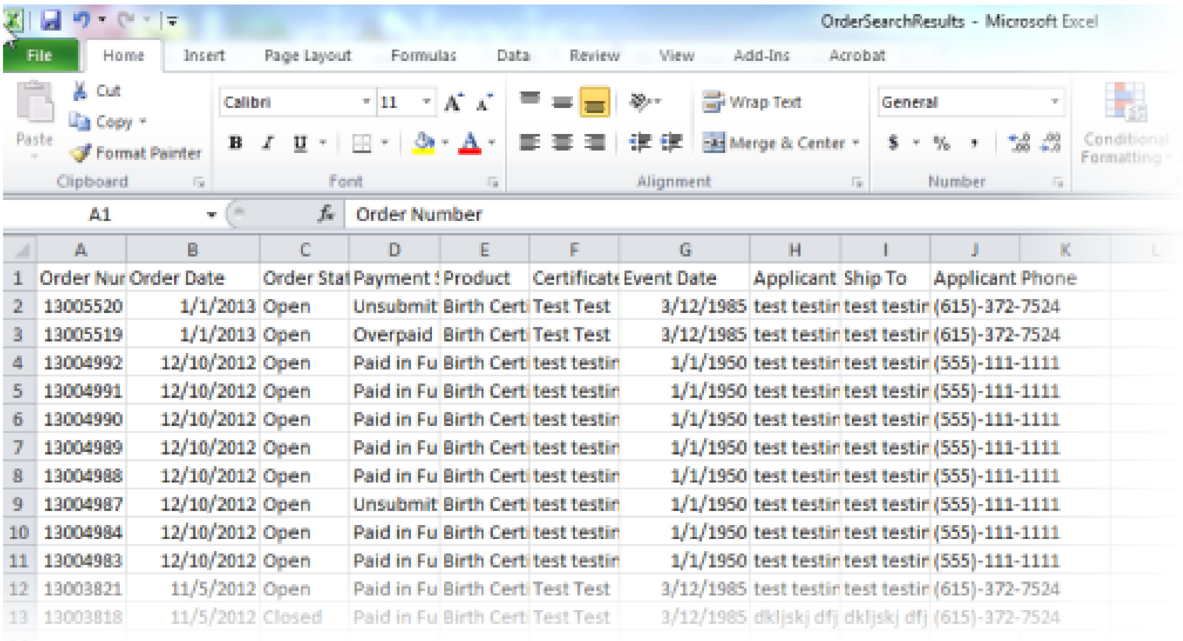
Step 2 **Order Search Results** box opens



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

Step 4 Click **OK** to submit selection

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
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 Certi	Test Test	3/12/1985	test testir	test testir	(615)-372-7524	
3	13005519	1/1/2013	Open	Overpaid	Birth Certi	Test Test	3/12/1985	test testir	test testir	(615)-372-7524	
4	13004992	12/10/2012	Open	Paid in Fu	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
5	13004991	12/10/2012	Open	Paid in Fu	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
6	13004990	12/10/2012	Open	Paid in Fu	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
7	13004989	12/10/2012	Open	Paid in Fu	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
8	13004988	12/10/2012	Open	Paid in Fu	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
9	13004987	12/10/2012	Open	Unsubmit	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
10	13004984	12/10/2012	Open	Paid in Fu	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
11	13004983	12/10/2012	Open	Paid in Fu	Birth Certi	test testir	1/1/1950	test testir	test testir	(555)-111-1111	
12	13003821	11/5/2012	Open	Paid in Fu	Birth Certi	Test Test	3/12/1985	test testir	test testir	(615)-372-7524	
13	13003818	11/5/2012	Closed	Paid in Fu	Birth Certi	Test Test	3/12/1985	dkljskj dfj	dkljskj dfj	(615)-372-7524	

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