CHAPTER 2

Issuing a Vital Record

OVERS User Guide

Oregon Vital Events Registration System

This manual is also available online at
http://www.oregon.gov/DHS/ph/overs/resources.shtml#User_Guides

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Oregon Health Authority

Center for Public Health Practice,
PUBLIC HEALTH DIVISION
Center for Health Statistics

2 Issuing a Vital Record

Table of Contents

Start a New Order 29
Fast Orders 29
Address Fields 30
Eligibility to Order Record 31
Event Search and Match 31
Services 34
Payment 34
Event Requested 35
Order Status 36
Issuance 41
Other Buttons 44
Long Orders 44
Match Events 45
Services 49
Payments 51
Order Summary and Status 56
Issue 56
Search for an Existing Order 56
Locate a Vital Record 60
A Few Words About Security Paper 61
Running Cashier Close 61

This chapter aims to explain the data entry process for creating orders and issuing vital records from **OVERS**. For additional instruction or troubleshooting help contact the **Help Desk** during normal business hours (*Monday – Friday, 8 am to 5 pm*) at **(971) 673-0279**. For questions about the definitions and rules for accepting the Oregon Death certificate registration, contact the Center for Health Statistics, Registration department at **(971) 673-1160**.

Start a New Order

To start a new order for a vital record access the order processing menu by clicking **Order Processing** on the **Main Menu** navigation bar. Once the Order Processing link has been selected, the **Main** submenu will collapse and the **Order Processing** submenu will expand.

There are 2 ways to create an order using OVERS: the Long Order and the Fast Order.

- If you are processing an Order in which there happens to be more than one Record being requested you will want to use the Long Order to Process the Order. For example a Funeral Home is requesting three different Records in one Order.
- If you are processing an Order in which only one Record is being requested then you can use the Fast Order to Process the Order. For example a family member is requesting a few copies of a decedent's Death Record.

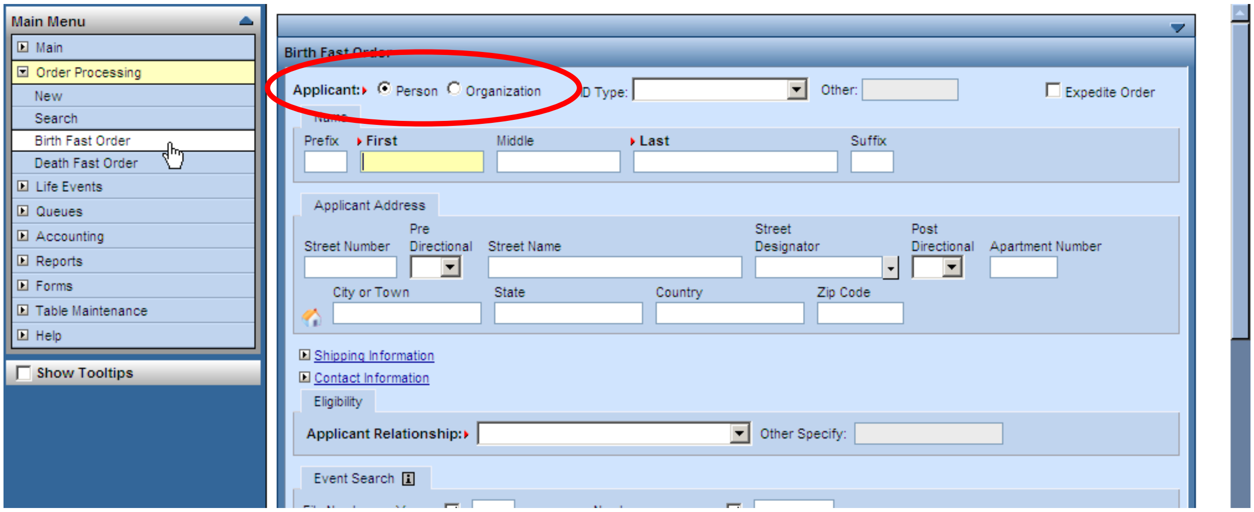
Fast Orders

While fast orders allow you to enter an order quickly by providing all the data entry on one screen, there are limitations to entering orders using this method. Namely, the fast order process can only be used for orders that include the purchase of only one registrant's record. Remember, if an order is for two or more registrant records the long ordering method is suggested.

The fast order for a birth certificate is started by selecting **Birth Fast Order** from the **Order Processing** submenu. The menu path is **Main Menu > Order Processing > Birth Fast Order**.

For death certificates the fast order is started by selecting **Death Fast Order** from the **Order Processing** submenu. The menu path is **Main Menu > Order Processing > Death Fast Order**.

You should see the fast order page as shown below:



Note that there are two radio buttons at the top of the page: **Person** and **Organization**. Organization should be selected when Funeral Homes or other governmental agencies request vital records. If **Organization** is selected, the **Name** tab will be replaced by an **Organization** tab.

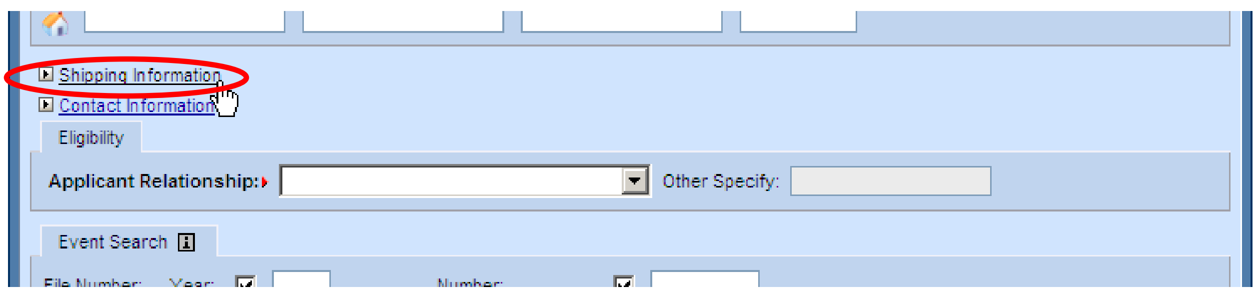
Key in all the applicable text entries for **Prefix, First** name, **Middle** name **Last** name, and **Suffix**. (Or **Organization Name**, which can be manually typed or selected from a Drop Down List.)

Next, choose the **ID Type** used by the applicant from the dropdown list. The **Expedite Order** checkbox is only used when a credit card is used for payment and an extra fee is charged.

Address Fields

Key in the applicable text entries for the **Address** tab. This address will be used for reference and in some cases for delivery of the certificate.

If the street address has a **Pre- or Post-Directional** indicator, (i.e. *East* 42nd St.) then indicate that using either the **Pre- or Post-Directional** dropdown list. Do NOT type the **Pre- or Post-Directional** indicator in the **Street Name** text box.



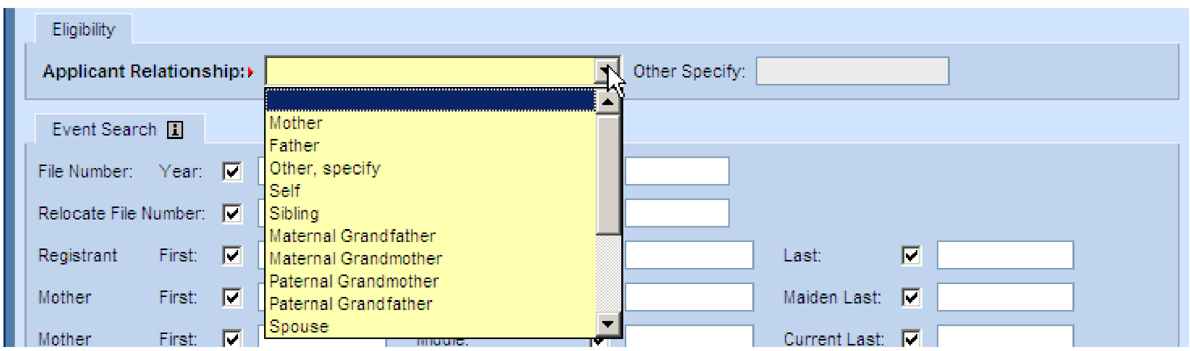
If the record will be shipped to a different address than the applicant's address, click on the Shipping Information link and a new **Shipping Information** tab will display. Complete the **Shipping Information** tab with the recipients name and address.

Key in the applicable text entries in the **Contact Information** tab. This field is not mandatory to complete the order, but the more information you provide the easier it will be to contact the customer if follow up is needed.

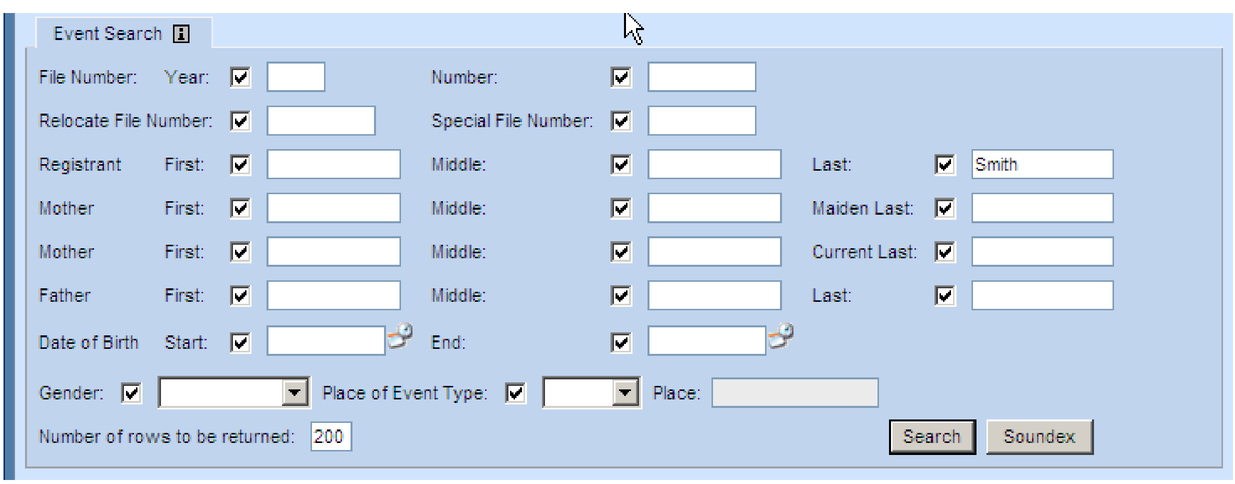
Eligibility to Order Record

From the **Eligibility** tab select the applicant's relationship to the registrant from the **Applicant Relationship** dropdown list. If the applicant's relationship to the registrant is not included in the list, select **Other** and then manually complete the **Other Specify** control. Not all of the relationships listed will necessarily be eligible to receive a copy of the Certificate. This is especially true when using the **Other** option.

Please note, that the list of options for the Applicant Relationship is different for birth records than for death records.



Event Search and Match



In the **Event Search** section, enter the search criteria for finding the certificate.   In the example above, we are searching for all birth records where the registrant's last name is "Smith".

The **OVERS** application does not require all search elements to be keyed when searching for a record, but providing more information will help limit the number of records returned. Only Records where the Place of Event occurred in your County will be available in the Search Results.

Because order request applications often contain inaccurate or missing information the **Event Search** section provides checkboxes next to each item. These checkboxes can be selected to indicate which items should be included in the search. **OVERS** will only look for matches on those elements that have been checked. If an element has a check selected but the field is left blank **OVERS** will automatically remove the selected check and the item will not be used as search criteria.

The **Event Search** section also provides the ability to search for an event by date range when the exact date of event is not known. To search by date range both the **Start** date and **End** date must be entered. If only the **Start** date is entered then an exact match on date will be performed.

The **Event Search** section also provides the ability to perform a **Soundex** search. **Soundex** is useful when you are unsure of the spelling of the applicants **First** or **Last** name. **Soundex** looks for sound-a-like names.

Once all of the desired search criteria have been entered, click on the **Search or Soundex** button to perform a search and retrieve a list of matching records.

Search Results:

Select	Date of Event	SFN	Registrant Name	Place of Event
			No Matching Event	
			Legacy Record	
Preview	FEB-05-2008		smith,	Multnomah
Preview	JUL-15-2008	2008017148	Smith, Bobbi James	Multnomah
Preview	JUL-15-2008	2008017148	Smith, Bobbi James	Multnomah
Preview	JUL-15-2008	2008017148	Smith, Bobbi James	Multnomah
Preview	NOV-12-2008	2008017262	Smith, Brianna James	Multnomah
Preview	DEC-16-2008		Smith, Chico James	Multnomah
Preview	DEC-16-2008		Smith, Christmas James	Multnomah
Preview	SEP-13-2008	2008017242	Smith, Cyrianna James	Multnomah

First 1 2 3 4 Last

Total records : 35

When the search results display, the first result in the list, No Matching Event, is automatically selected. The system will then list Records that are potential matches to the Search Criteria used if any are found.

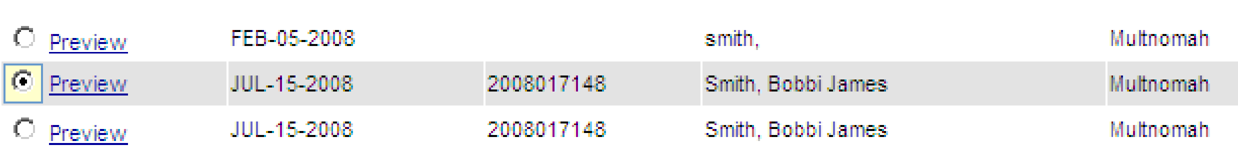
To view the details of any of the records listed, click on the preview link next to the record. This allows you to examine the details of a record to insure that you have found the correct one.

Previewing Record Status – When selecting an event you must check the status of the vital record(s) being ordered because the status will indicate if a record should be issued or not. There are certain circumstances under which you should not release a record and you will only know that by reviewing the status bar. For example, you should only issue a vital record if it has been assigned a State File Number (otherwise known as being 'registered' with the State).

There are certain circumstances under which you should not release a record and you will only know that by reviewing the status bar. Only records that have been registered and received a State File Number (SFN) and do not have a hold should be issued.

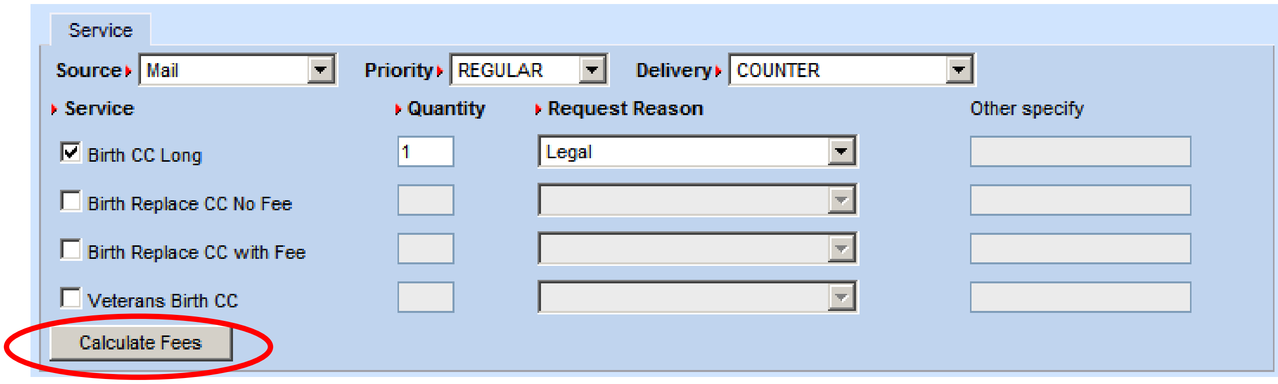
The list of status terms in Chapter 1 describe what each phrase on the status bar means and which terms indicate that you should not issue a record. Note that the terms for a birth certificate will be different than the terms for a death certificate.

Select a Match:
In the Fast Order entry process there is no Save selection available to designate the Record as a match, instead selection of the radio button to the left of the record selects that record as the matched event.



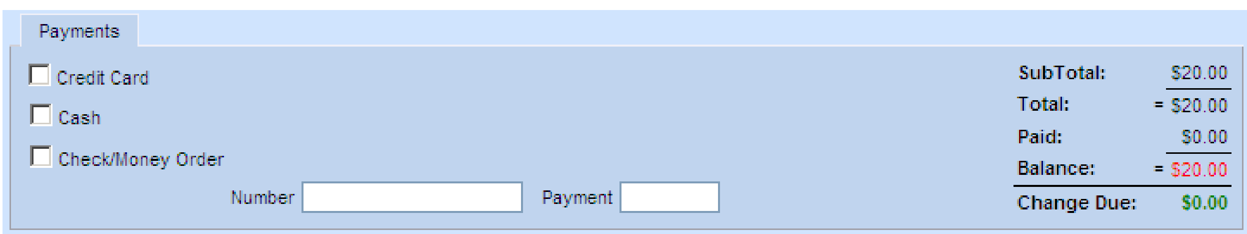
After selecting a matching event, choose the service to be provided.

Services



Select a source from the **Source** dropdown; select a priority from the **Priority** dropdown (the priority will always be regular) and select a method of delivery from the **Delivery** dropdown.

Click the checkbox next to the service(s) associated with this order and enter the quantity desired for each service in the **Quantity** text box. Select a reason from the **Request Reason** dropdown. Once these steps are completed, click the **Calculate Fees** button. The page will refresh and the fees will appear in the **Payments** section directly below the Services section.



Payment

Click the checkbox next to the payment type and enter the payment amount. If a check or money order is used as payment, enter the check or money order number.

Credit Cards: Only counties who have an account with VitalCheck should use the credit card option.

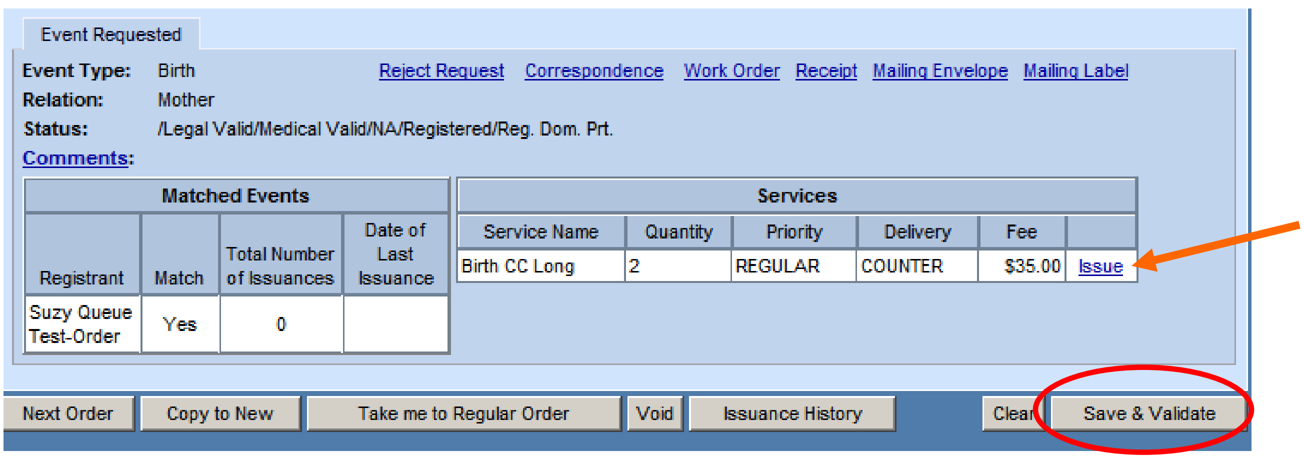
Once the payment is entered, the page will refresh showing payment and updating the **Balance** due. Notice also the **Change Due** line. If there had been an overpayment, as would be the case if a customer offered a $50 bill to pay a $20 balance, the amount due back to the customer would be displayed here.

Event Requested

The Event Requested section is a summary of the order and provides access to issuing the requested record. At this point you will want to Validate the Order ensuring completeness and accuracy of the Order information which is used to determine if the Record can be Issued. To Validate the Order select the **Save & Validate** button. Selecting the **Save & Validate** button will cause 2 things to occur:

1. The Order Number will be assigned to the Order and the Order itself will now be Saved in the System. This means that if you should need to leave this Order before Issuing and Completing it you will be able to find it in the System at a later date and Issue and Complete the Order as needed.
2. The Order will run through a Validation process insuring that the requested Record can be Issued. The Validation process checks many details of the Order such as, Applicant Eligibility, Status of the Record, Received Payments and completeness of the Order to determine if the Record can or cannot be Issued.

If the Order passes all Validation Rules the Issuance link next to the Service(s) selected will be made available.



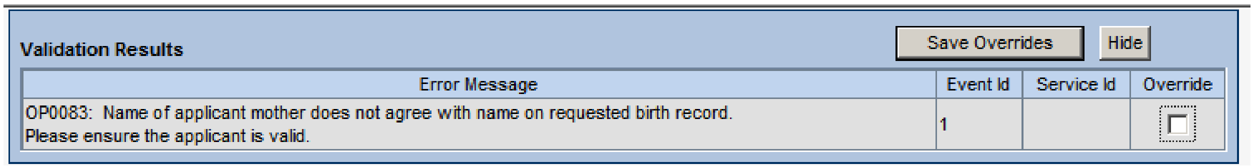
Previewing Record Status – When selecting an event you must check the status of the vital record(s) being ordered because the status will indicate if a record should be issued or not. The Event Requested section will allow you to view the Status of the Record once more time prior to Issuance. There are certain circumstances under which you should not release a record and you will only know that by reviewing the status bar. For example, you can only issue a vital record if it has been assigned a State File Number (otherwise known as being 'registered' with the State).

There are certain circumstances under which you should <u>not</u> release a record and you will only know that by reviewing the status bar. Only records that have been registered and received a State File Number (SFN) and do not have a hold should be issued.

The list of status terms in Chapter 1 describe what each phrase on the status bar means and which terms indicate that you should not issue a record. Note that the terms for a birth certificate will be different than the terms for a death certificate.

Validation Triggers

If the order contains incomplete data or errors the validation process will trigger error message(s) which will appear at the bottom of the page. To issue the record, you must either correct the errors or override the error message.



To correct the errors simply review the error message and then correct the issue that is described. You may determine after reviewing the error message that the Issuance should not occur, for example if the Record is not yet Registered. In this case you can copy the Order Number down and access it later to complete the Issuance after the Record has in fact been Registered.

If an order has errors that can be overridden, a checkbox will appear in the **Override** column. If you wish to override the error message so you can Issue the Record as is, click the override checkbox and click the **Save Overrides** button. Click the **Save & Validate** button again to re-validate the Order signaling to the System that you have Overridden the error message but will Issue the Record as is.

Order Status

You can also check the status of an order just like you can check the status of a vital record. The Order will be placed in several different Statuses based on the results of the Validation Rules that are triggered. The Order Status is divided into two sections denoted by a forward slash (/). The first word in the Status indicates whether a Validation Error Message has been triggered in the Order. The second word in the Status indicates why the Issuance of the Record cannot be completed or if the Issuance has not been completed.

An example of some of the Order Statuses you may see:

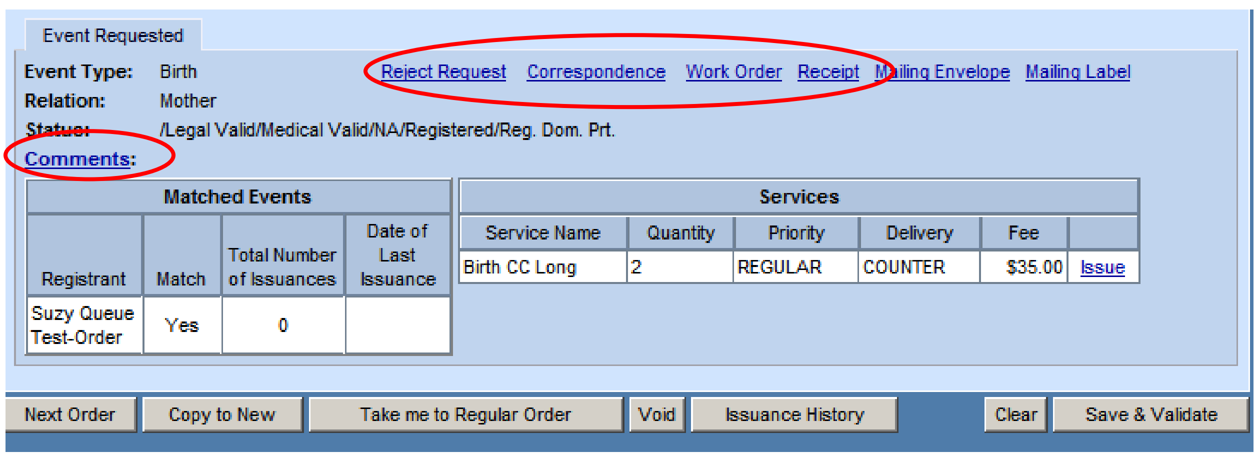
Order Status	**Definition**
Keyed/Incomplete	This status is assigned when the order is started and not yet validated. The Issuance is incomplete until the 'complete' link is clicked on the issuance page.
Order Invalid/Registration on Hold	This status is assigned when a validation error message has been triggered. The issuance can not be completed because there is a hold on the registration.
Order Invalid/Insufficient Funds	This status is assigned when a validation error message has been triggered. The issuance cannot be completed because the order does not list sufficient

	payment.
Order Invalid/Certificate Not Found	This status is assigned when a validation error message has been triggered. The issuance cannot be completed because there is no matching event associated to the order.
Order Valid/Incomplete	This status is assigned when the order has reached a valid status; no validation error messages have been triggered but the issuance is incomplete until the 'complete' link is clicked on the issuance page.
Order Valid/Complete	This status is assigned when the order has passed all validation and all issuances have been completed.

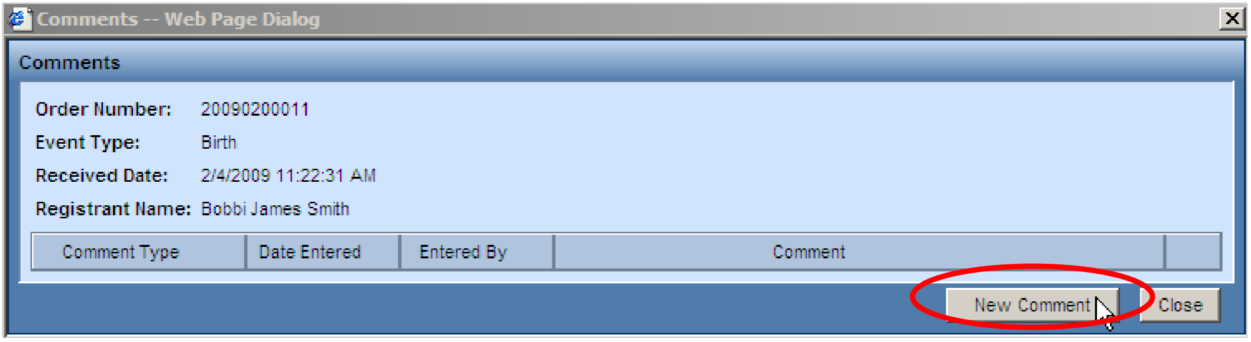
To see the Order Status that is assigned simple click the Order Number located at the very top of the Order Summary Screen (or at the top of the Fast Order Processing Page) and a light blue bar will open showing the Status.

Event Requested – Other Links

There are several other links in the Event Requested Section: **Comments**, **Reject Request**, **Correspondence**, **Work Order**, and **Receipt**.

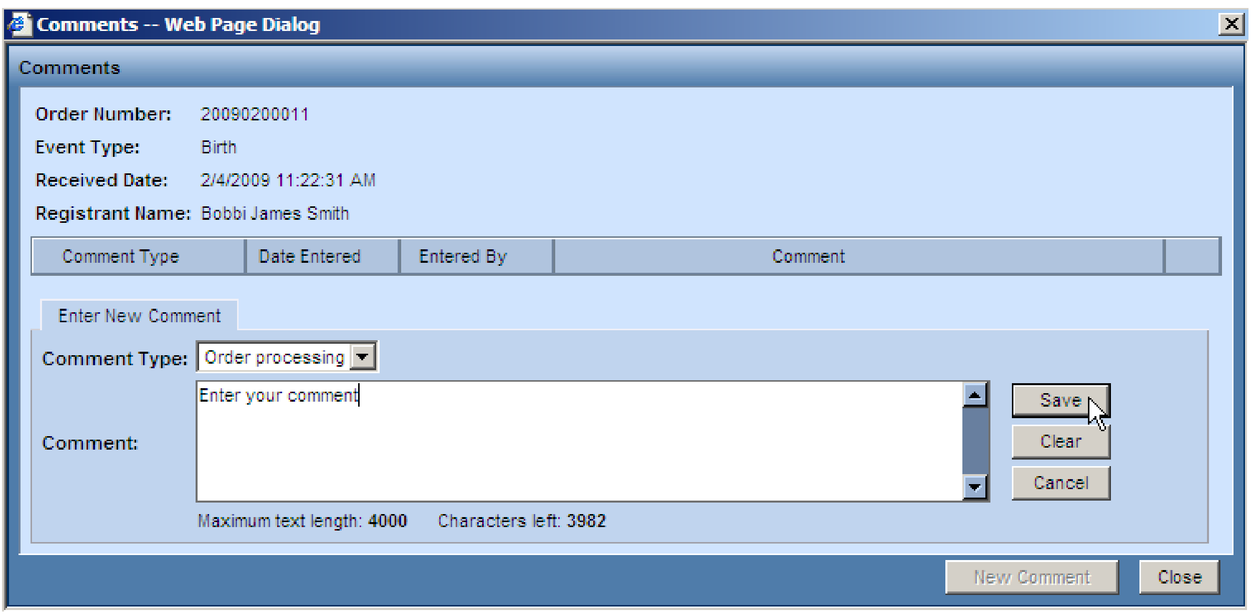


Comments - Clicking on the Comments link will open the **Comments Web Page Dialog** box. Use the scroll bar on the right side of the **Comments** box to display the **New Comments** button and click on it.

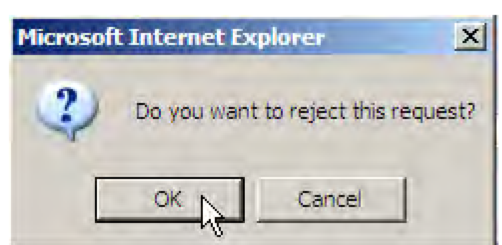


From the **Comment Type** dropdown, select **Order**. In the **Comment:** text entry box enter your comments. Then, select **Save** to save your comments and exit the comment entry form, **Clear** to clear your comments and start over, or **Cancel** to close the comment entry form without leaving any comments.

Once you have saved your comments you can click on the **Edit** link to re-open the comment entry form and change your comments, the **New Comment** button to add a new comment or the **Close** button to close the comment dialog box.

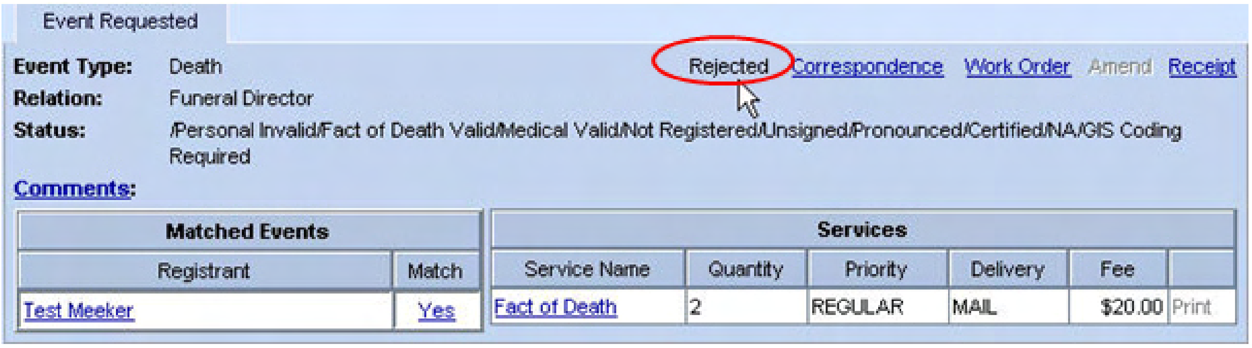


Reject Request - Occasionally, it may be necessary to reject an applicant's request for a certificate or other service, as would be the case when the applicant is not eligible to receive the document.



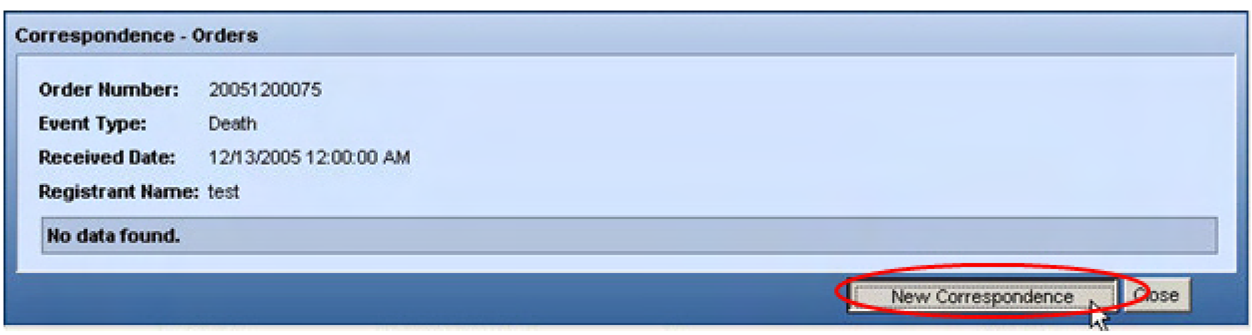
In these cases, you would reject the request by following these steps clicking the **Reject Request** link in the Event Requested section. A popup window will ask if you want to reject the request? Rejecting a request cannot be undone so if you are sure you want to reject the request, click the **OK** button. Otherwise click the **Cancel** button.

The **Event Requested** page will refresh. Notice that the **Reject Request** link has been replaced with a **Rejected** label.

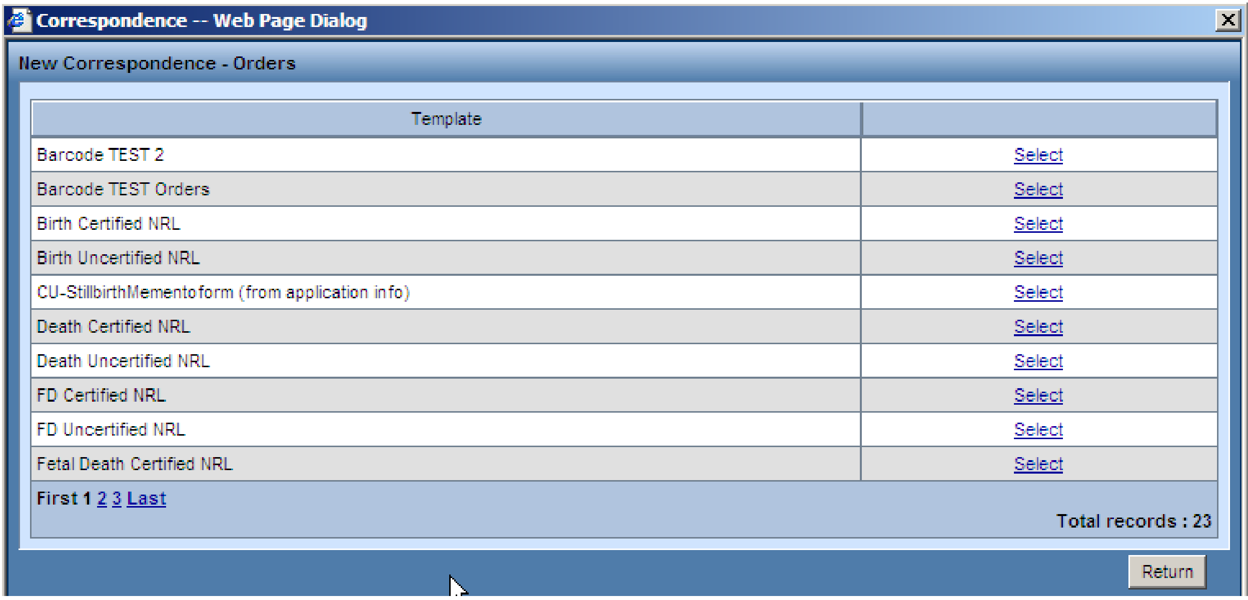


Correspondence - Occasionally, it is necessary to correspond with vital records applicants. For example, offices often send letters to customers notifying them of a ‘no record found’ situation or simply to notify them that they are not eligible to receive a certified copy of a record. To facilitate the sending of these letters, OVERS includes a **Correspondence** feature.

From the **Event Requested** section, locate and click on the **Correspondence** link. The **Correspondence** dialog will open and display a listing of correspondences that have been issued on this record. In the example below, no correspondence have yet been sent. To initiate a new correspondence, click the **New Correspondence** button.



The **New Correspondence – Orders** dialog will open and display a list of the possible letters than can be printed. Click the Select link next to the appropriate letter.



The **New Correspondence – Orders** dialog will display a list of the possible reject reasons that can be added to the correspondence. Select the appropriate reason(s) and click the **Add** button.

From the **New Correspondence – Orders** window, click on the **Select** link next to the correspondence to be printed. Next, click the **Download** link to launch the correspondence itself.

Work Orders - Sometimes you may not be able to tell from the onscreen information whether or not you are looking at the right record. Or perhaps you may be dealing with a legacy record that is not in the **OVERS** database. In cases like these, you can print out a work order to carry to the vault to assist in performing a manual paper search.

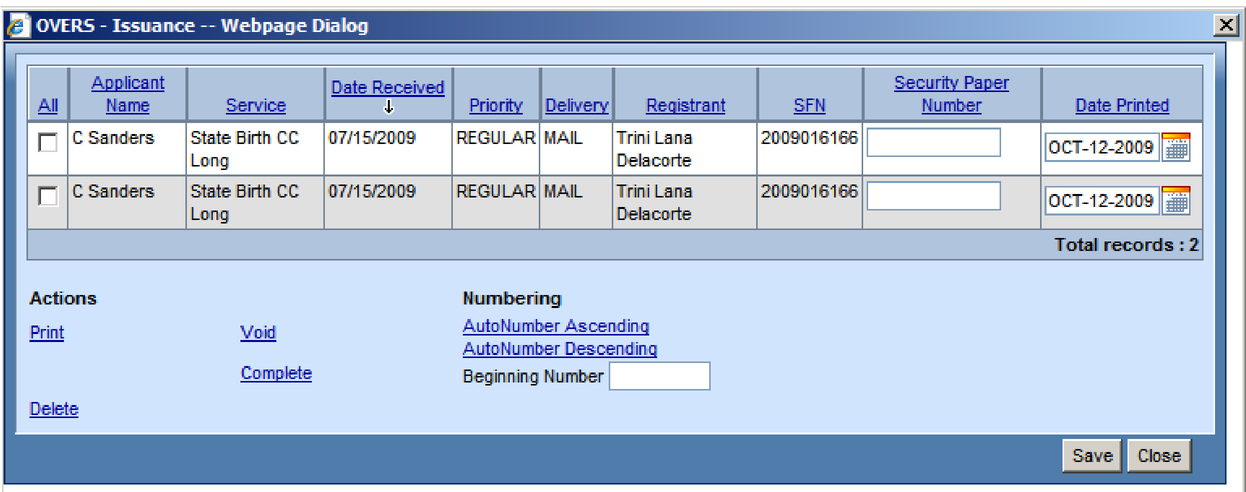
To print a work order, click on the **Work Order** link. A **File Download** dialog box will open. Click on the **Open** button to open the **Work Order** for printing. Click **Cancel** to close the **File Download** dialog box without printing.

Receipt - Sometimes your customers will require a receipt to demonstrate that they have paid for services rendered. It may even be a requirement in your office to provide a receipt.

To print a receipt, click on the Receipt link. A **File Download** dialog box like the one pictured below will open. Click the **Open** button to open the Receipt for printing. Click **Cancel** to close the **File Download** dialog box without printing.

Issuance

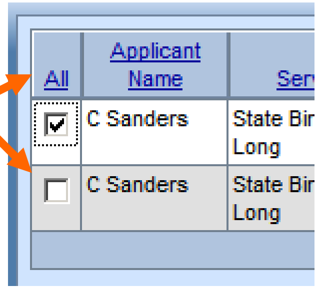
To issue the record associated with this order, click on the Issue link in the services table of the Event Requested section. The Issuance pop-up window will open.



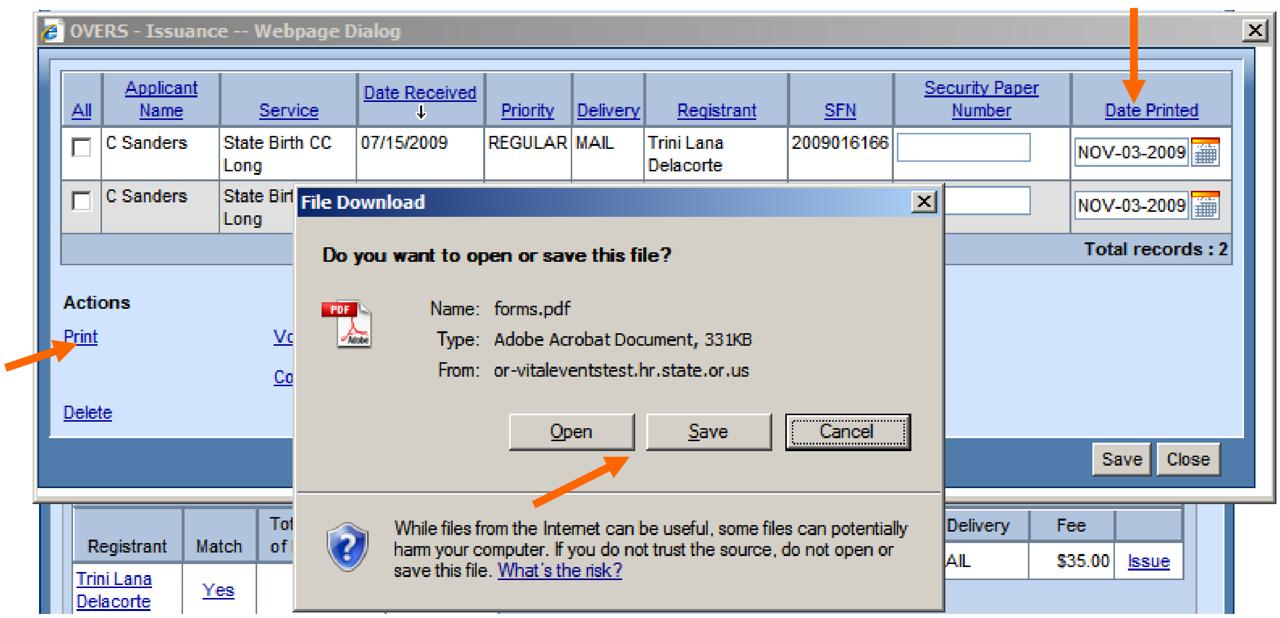
The **Issuance** dialog is used to print certified copies of records. Note that all of the column headers are underlined. This indicates that the headers can be used to re-sort the table of information by clicking on them. For example, clicking on the File Number header link will resort the list in **File Number** order.

To print a certificate, follow these steps:

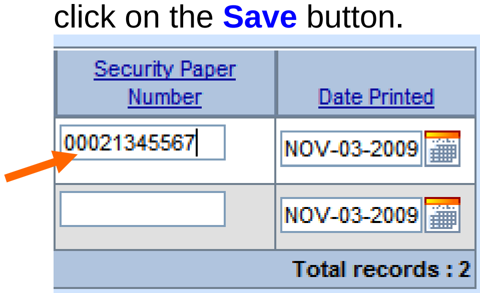
1. Place a checkmark in the checkbox next to the issuance(s) you want to print. If you want to print all issuances select the **All** link at the top of the checkbox column.



2. Next, select the **Print** link to print the issuance(s) you have selected. Selecting the **Print** link will auto-fill the **Date Printed** with the current date and then launch the Windows file download dialog box. Select **Open** to open the forms.pdf file and print the certificate. If you are issuing a Certified Copy make sure to print the certificate on intaglio (security) paper.

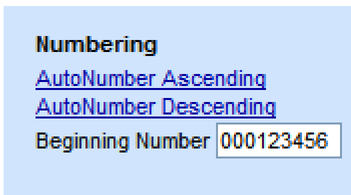


3. Once the record has printed ensure that the items have printed correctly. If you have printed a Certified Copy and you have ensured the form has properly printed you will need to enter the intaglio (security) paper number. To do this simply input the **Security Paper Number** into the entry box and click on the **Save** button.

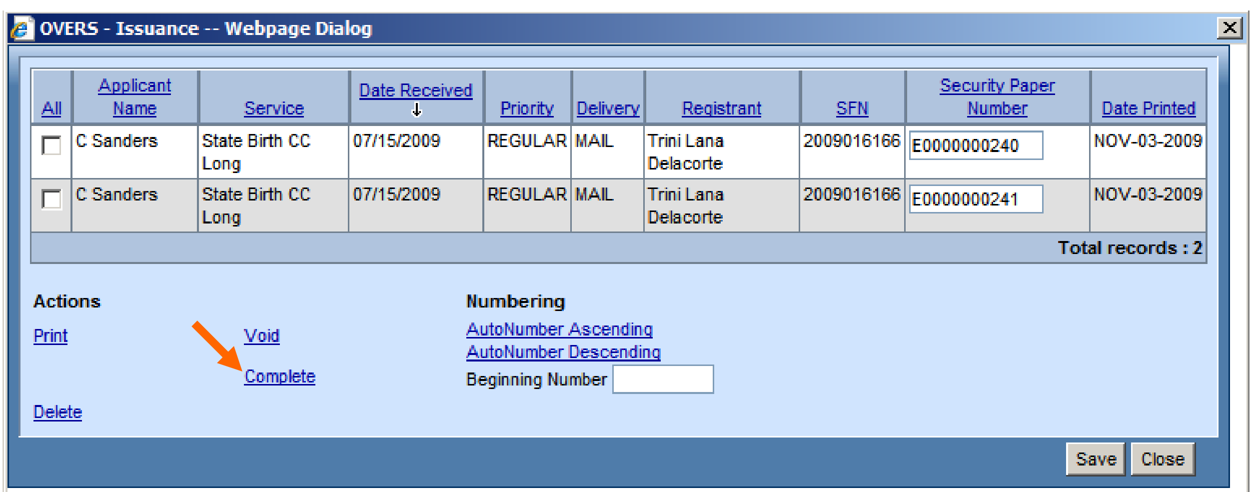


Note: if you have more than one Issuance to enter Intaglio (Secuirty) Paper numbers for you can use the AutoNumber Ascending or AutoNumber Descending functionality to allow the system to automatically enter the numbers for the Issuances. To assign security paper numbers to a group of certified copies. Follow these simple steps to use the AutoNumber feature:

1. Place a check mark in the **All** column of the records to be updated.
2. Enter the starting number in the **Beginning Number** text entry box
3. Click the **AutoNumber Ascending** or **Descending** link to start the numbering process



4. Once you have printed the certified copy, verified it has printed correctly, and entered the security paper number you will use the **Complete** link to mark the issuance as completed. This is the final step in processing an order. You must place a check mark in the box located next to the the issuance you want to complete. If you would like to complete all issuances then simply click the ALL button at the top of the checkbox column. Once you have selected the issuances you wanted to complete select the **Complete** link. Once you have marked your issuance(s) complete you can close out of the Issuance screen.



5. If you need to track shipment of the certificate then place your shipper provided tracking number in the **Tracking Number** control and click **Save**.

6. Click the **Close** button to close the **Issuance Web Page Dialog**.

7. Once the issuances have been marked complete the **Issue** link on the **Summary** page will be disabled and the total number of Issuances will be updated to reflect the Issuances just completed. If all issuances associated to the Order have been completed the Order will also receive a status of Order Valid/Complete.

Matched Events			
Registrant	Match	Total Number of Issuances	Date of Last Issuance
Trini Lana Delacorte	Yes	2	NOV-03-2009 02:17 PM

Services					
Service Name	Quantity	Priority	Delivery	Fee	
Birth CC Long	2	REGULAR	MAIL	$35.00	Issue

Void – If a record has been printed but needs to be voided because it did not print properly, the paper jammed, etc… then use the **Void** link (in the Issuance window) to void the security paper number and reprint a new certified copy.

When using the Void functionality all Intaglio (Security) Paper numbers entered will also be voided from the system. This means the paper will no longer be Valid and can no longer be used to create Certified Copies on. To void the entire order and start anew, use the Void link at the bottom of the Summary page.

Other Buttons

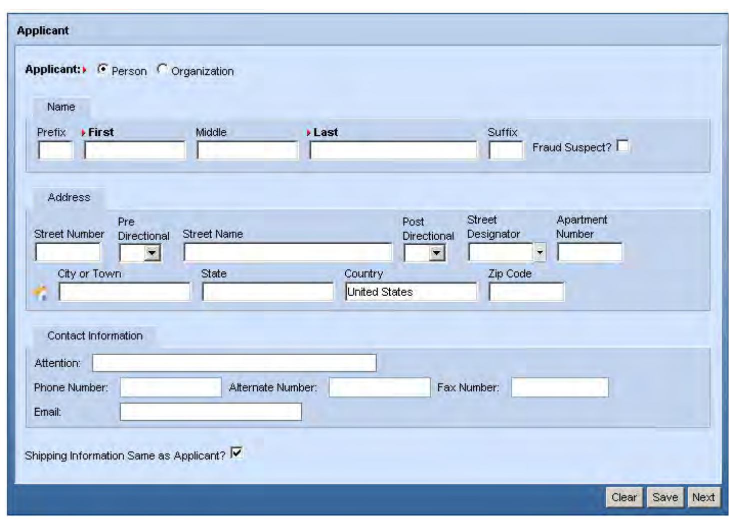
At the bottom of the Fast Order page there are several buttons: **Next Order**, **Copy to New**, **Take Me to Regular Order**, and **Issuance History**.

Clicking on the **Next Order** button allows you to start a new Fast Order. Clicking on the **Copy to New** button allows you to copy all the information on the current order to a new order. The **Take Me to Regular Order** button will transfer the order data from the Fast Order format to the Long Order format and the **Issuance History** button will show you a summary of the printed record information.

Long Orders

The Long Order form is used when two or more registrant's records will be purchased within the same order.

From the **Main Menu** select **Order Processing > New**. You should see the **Applicant** page as shown below.



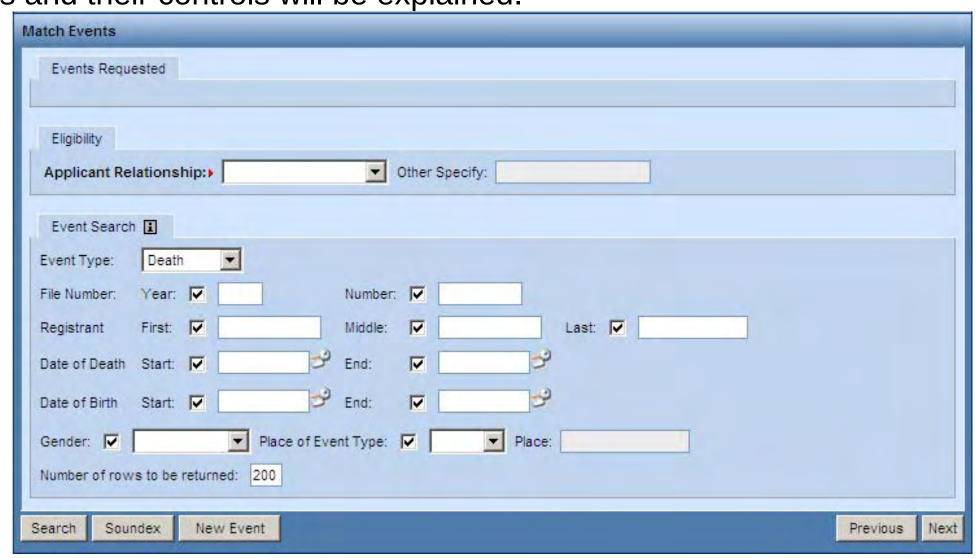
The information required on this page is the same as is required on the top portion of the Fast Order form.

When all applicable fields have been filled, click the **Next** button to save the data and proceed to the next page, the **Save** button to save the data entered on this page, or the **Clear** button to remove the data entered.

Match Events

After clicking the **Next** button notice that the page refreshes and that the menu on the left changes. The **Main Menu** collapses and the **Order Processing Menu** expands.

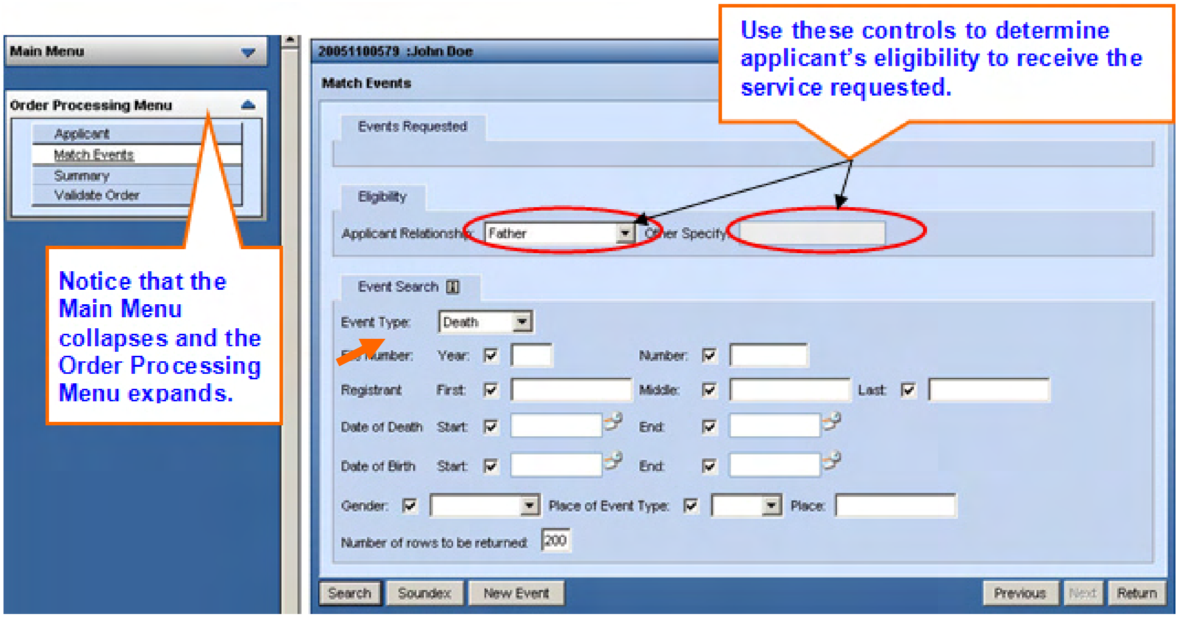
There are 3 steps to completing the **Match Events** page. Each step will open up a new pane on the **Match Events** page. In the image above, note that there are three tabs displayed: **Events Requested**, **Eligibility** and **Event Search**. The **Event Search** tab introduces a new onscreen element: the **Instructions** icon ( ). As we proceed, all of these tabs and their controls will be explained.



<u>**Step 1 - Eligibility and Event Search:**</u>

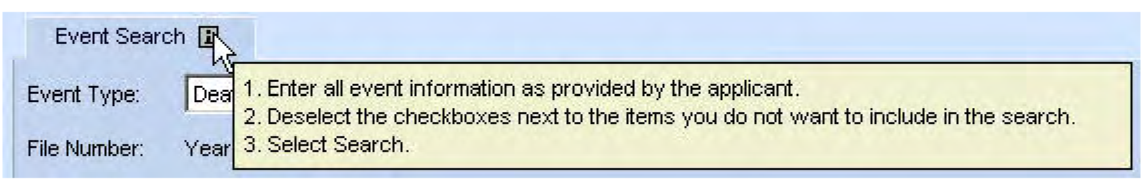
Initially, the **Events Requested** tab is empty. This tab will be populated later.

From the **Event Search** tab you will select the Event Type (birth or death) from the dropdown menu. The Event Type defaults to "Birth". If you change the Event Type to "Death" the page will refresh and the dropdown list for the Applicant Relationship will change.



From the **Eligibility** tab select the applicant's relationship to the registrant from the **Applicant Relationship** dropdown list. If the applicant's relationship to the registrant is not included in the list, select **Other** and then manually complete the **Other Specify** control.

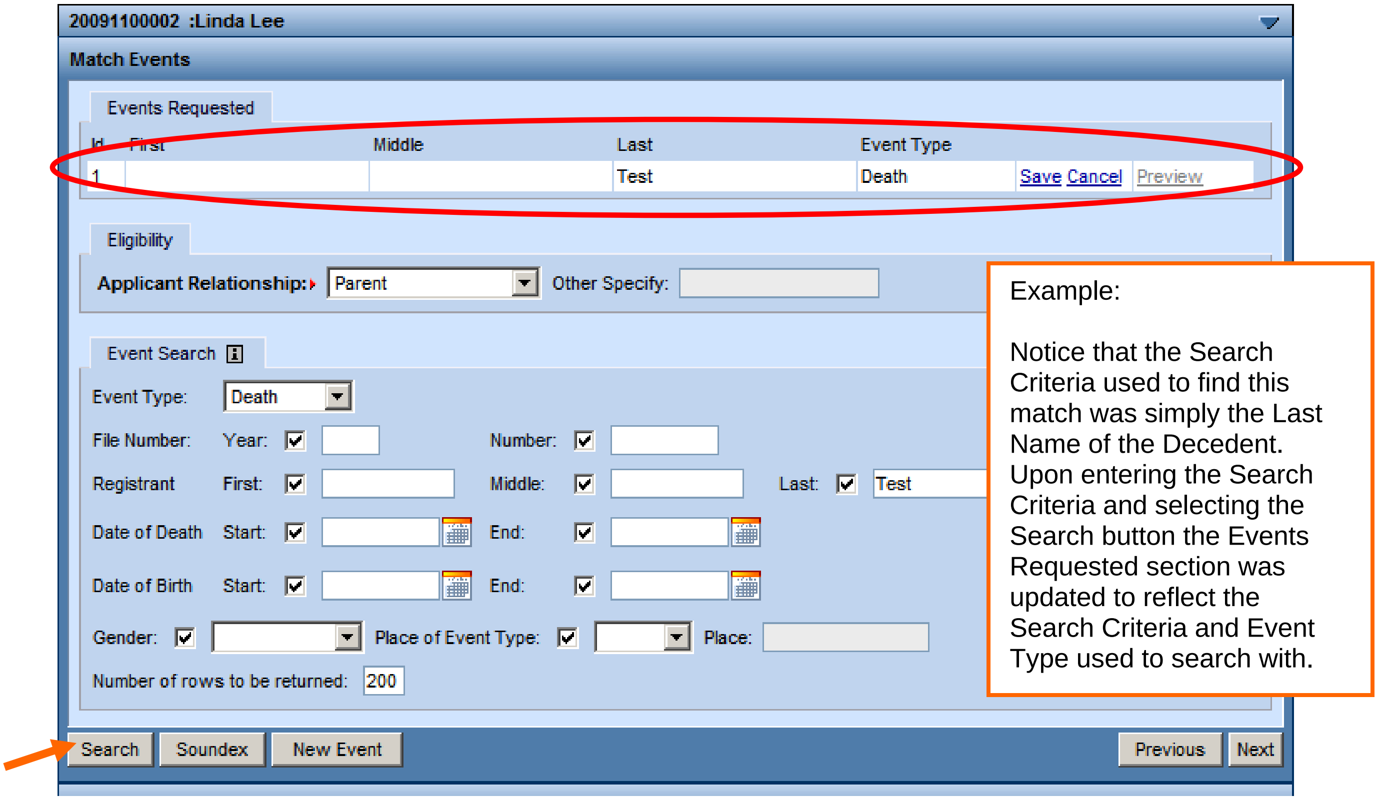
In the **Event Search** tab you will enter the search criteria to be used to find the record for which a death certificate or other service is needed. Allow your onscreen cursor to hover over the **Instructions** icon (🛈) for more information about completing this page.



The information required in the Event Search section is the same as is required on the Fast Order form.

Once all of the desired search criteria have been entered, click on the **Search** button or **Soundex** button to perform a search and retrieve a list of matching records.

Once you select the Search or Soundex button the Events Requested section will update to show the Criteria and Event Type you just entered to search with. It will label the first Event search attempted with a 1. Each additional Search will number sequentially ascending to allow you to access to the Events Search and Match Results at anytime.

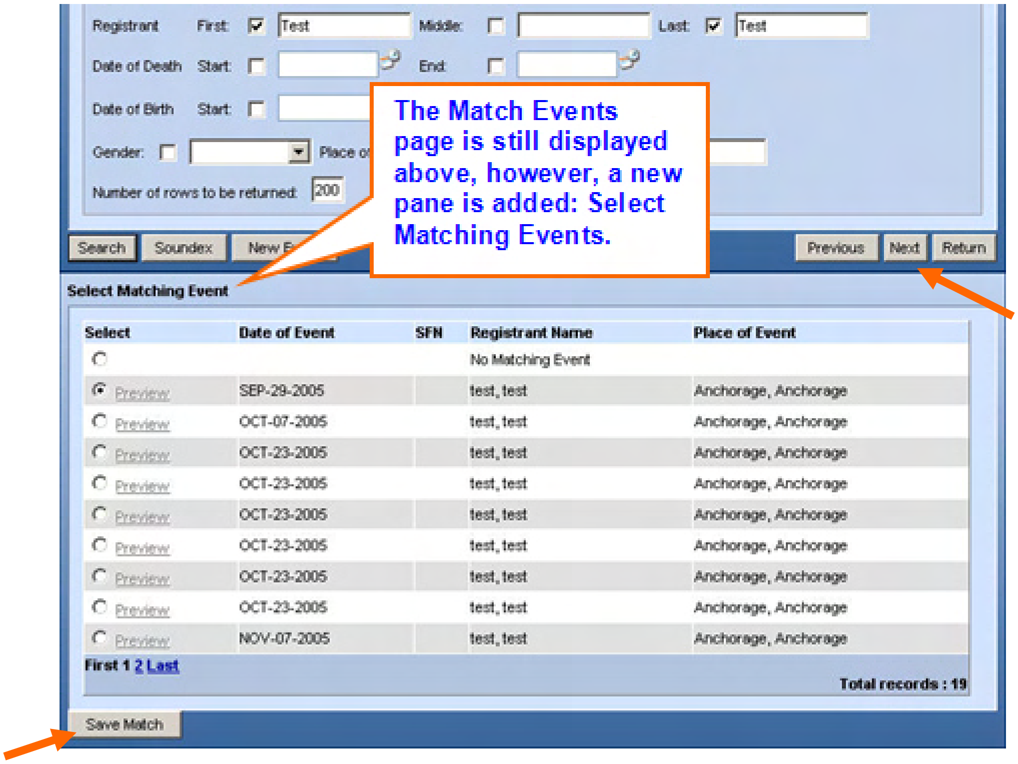


If the search does not return any matching records, click the **New Event** button to clear the data and start over. If the Search does not return any Matching Events either refine your Search Criteria and select to Search again or select the No Matching Event Radial Button. Click the **Previous** button to return to the **Applicant** page.

The Instructions icon (🛈) indicates that onscreen instructions or information are available for that user interface element. Just allow the cursor to hover over the (🛈) icon and the instructions or information will 'pop' onscreen.

Step 2 - Select Matching Event:

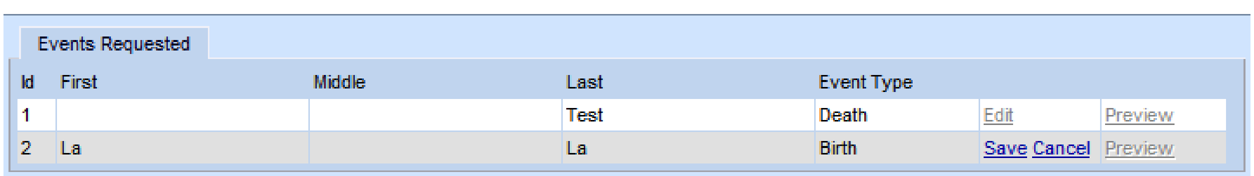
Selecting **Search** or **Soundex** in **Step 1** above will initiate the record search and open the **Select Matching Event** pane, as shown in the following example.



Select the appropriate event from the Select Matching Event section just as was done on the Fast Order form. Once you have previewed the record and have determined that it is the correct record and that it can be issued, click the **Save Match** button and then select the **Next** button to continue on with the Order or the **New Event** button to add an additional Event Record to the Order.

Remember: There are certain circumstances under which you should not release a record and you will only know that by reviewing the status bar.

To add additional Events to the Order select the **New Event** button. Selecting the **New Event** button will refresh the **Match Event** page and allow you to **Search** for a new Event Type and match to a new record. Follow the same steps above to search for the additional record to be processed with the order. As soon as you select the **Search** or **Soundex** button for the new event the **Events Requested** will be updated to reflect the search criteria used and the event Type searched by.



Selecting **Edit** will allow you to edit the search criteria for the event selected. Selecting **Save** will save any changes made to the event you are working with since the **Search** button was last activated on the Matched Event Page within this order. Choosing

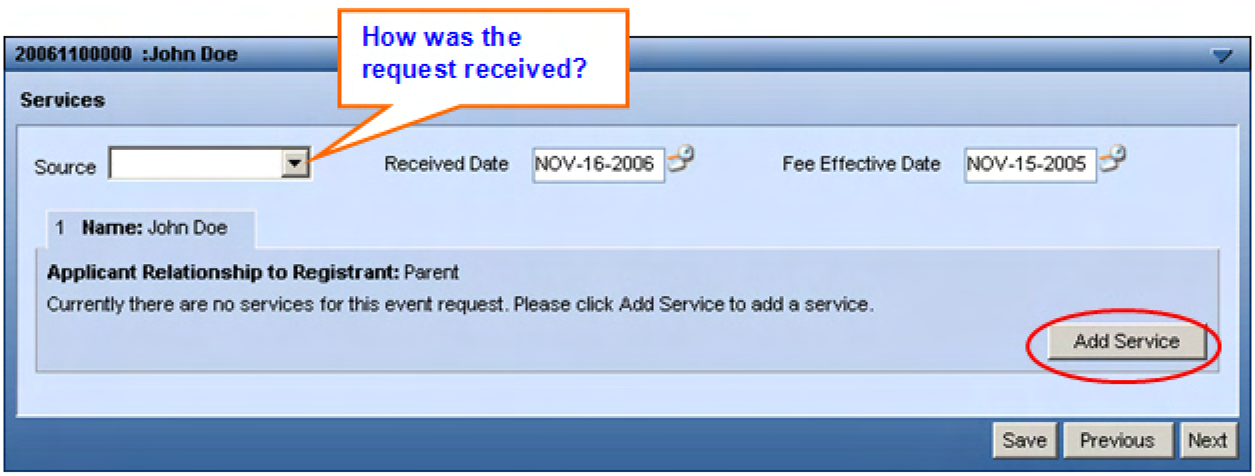
Cancel will reset any changes made since **Search** button was last activated on this order. Selecting Cancel will reset to the selections to **Edit** and **Delete**.

Once you have saved the matches for the events requested select the **Next** button to proceed with order entry, the **Previous** button to return to the **Applicant** page, or the **Return** button to return to the **Main Menu**.

Services

Now that you have saved a matching event, it's time to select the desired service.

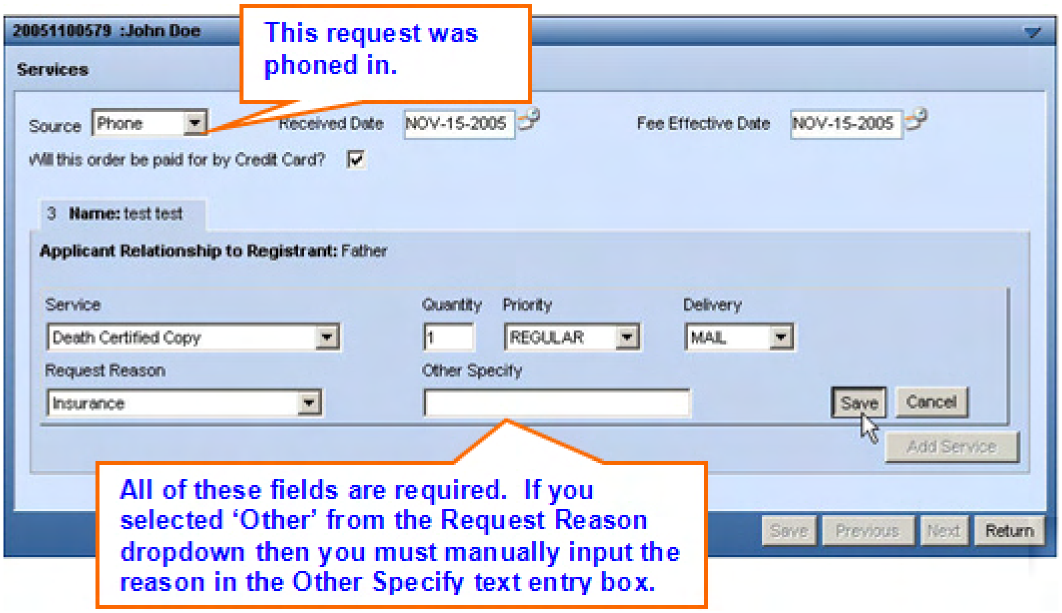
On the **Services** page, locate the **Source** dropdown list. From this list select the method by which the request for service was received; Fax, Internet, Mail, Phone etc…

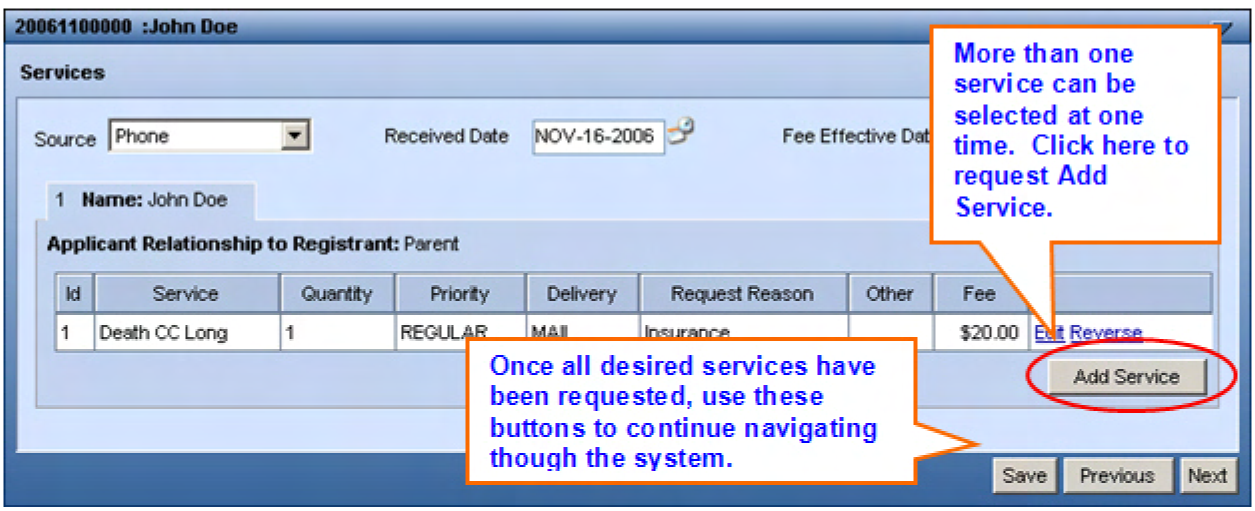


Use the **Received Date** control to enter the date the request was received and the **Fee Effective Date** control to enter the date on which the fees are to be applied. Both of these dates are automatically populated with the current day's date when the page is opened.

The Services page lists all of the events requested from the previous Match Event page. If there are multiple events requested then each event requested will need to have services added to them. The events requested are designated by name tabs which show the name of the registrant listed on the matched event. If no matched event was found then the name tab displays the search criteria entered for the registrant's name.

Select the **Add Service** button to select the desired service for the event requested. The **Name** tab will expand as shown below. Make a selection from the list of services, enter the quantity desired in the **Quantity** text box, select a priority from the **Priority** dropdown (priority should always be "Regular"), select a method of delivery from the **Delivery** dropdown, select a reason from the **Request Reason** dropdown and then select **Save** to finish your selection or **Cancel** to clear all entries and start over.





If any errors are found in this service request, click the **Edit** link to change the service.

The **Reverse** link can be used in situations where fees have been collected for a service that has been completed but a determination is later made that the applicant is entitled to a reimbursement of fees paid. If you select the Reverse link after the Intaglio (Security) Paper number has been added to the selected Issuance for the Service the Intaglio (Security) Paper number will be voided from the system. This means the paper will no longer be valid and can no longer be used for printing certified copies.

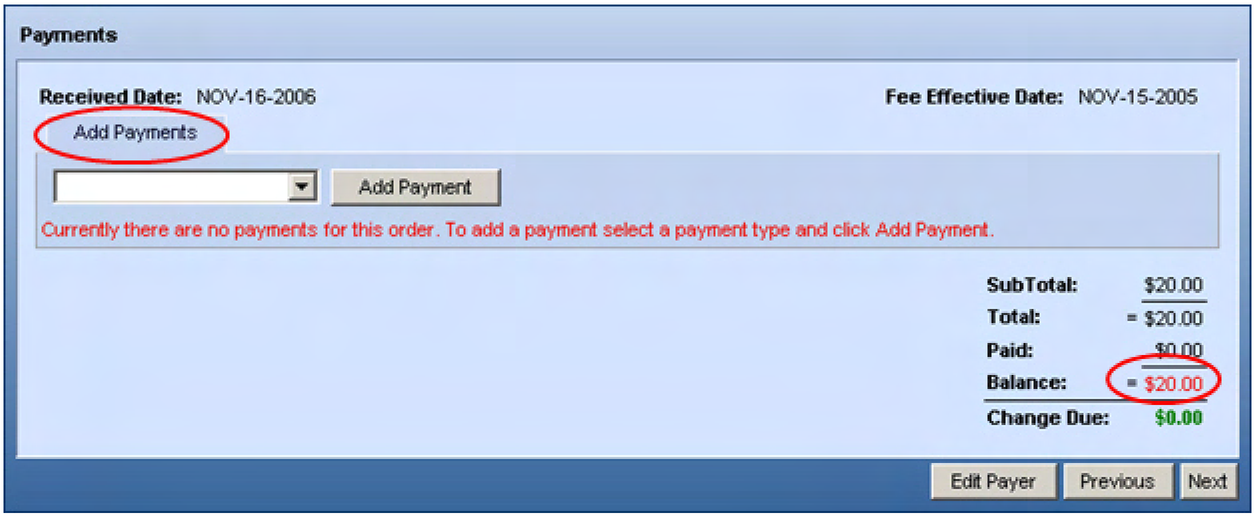
More than one service can be requested per record. If additional services are desired, click on the **New Service** button and repeat the steps above.

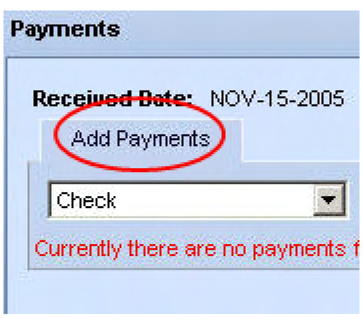
Once you have entered all services the navigation buttons at the bottom of the **Services** tab will be enabled. Select **Save** to save your selections without proceeding, **Previous** to return to the **Match Events** page, **Next** to proceed with your order or **Return** to return to the **Main Menu**.

Payments

The next step in completing the order is to collect any fees that are due.

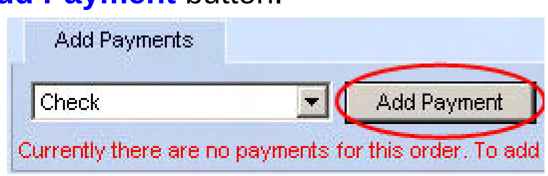
Once the services have been added to the order, the **Payments** page (shown below) will show a **Balance** due.





In order to record the payment select one of the valid payment options from the **Add Payments** dropdown list.

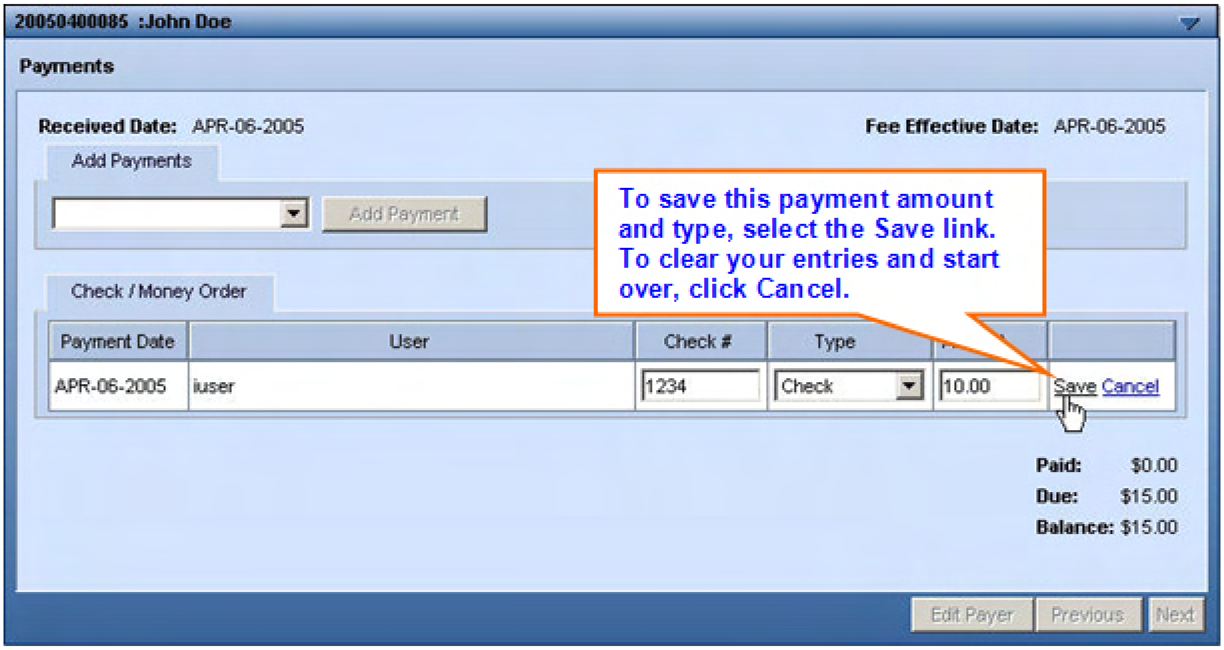
With a payment option selected, click the **Add Payment** button.



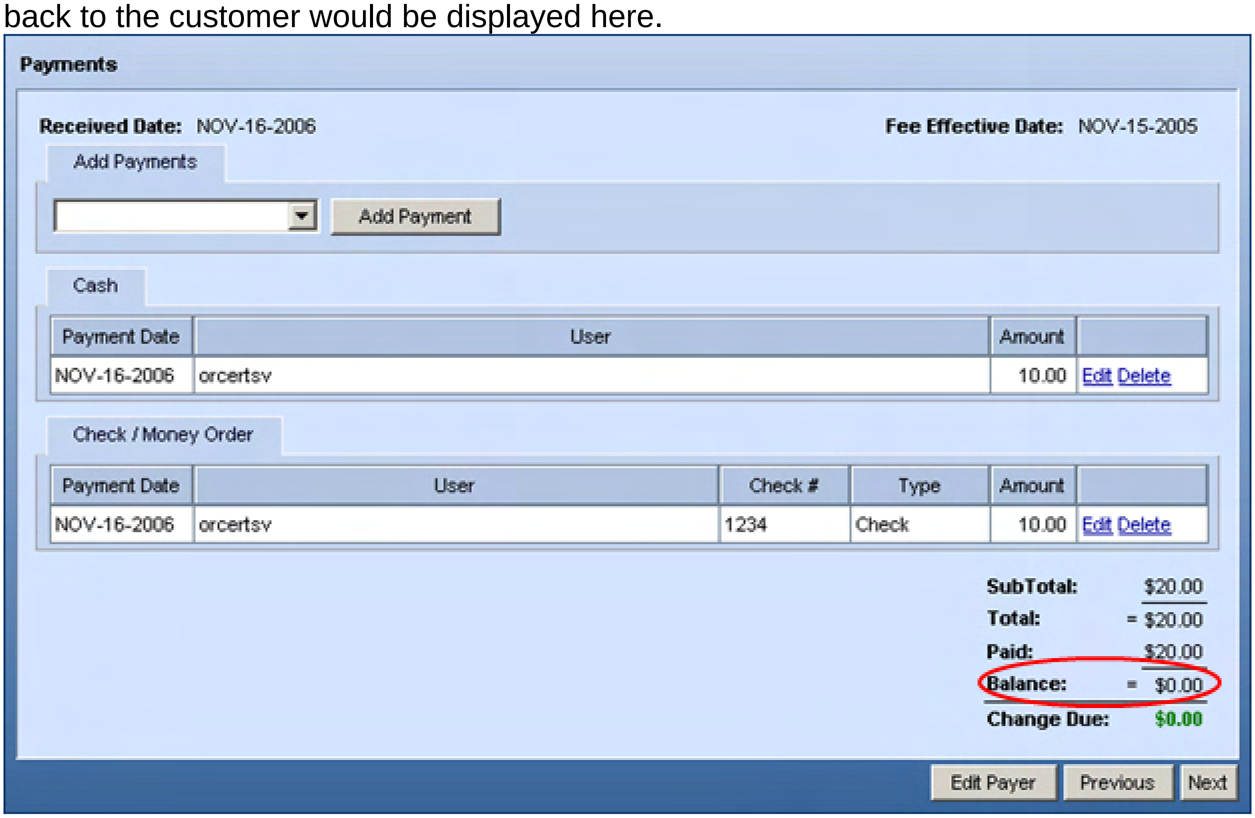
If the payment method is check or money order enter the **Check #** in the text entry box. For **Type**, select the appropriate option. In the amount column enter the amount of the check presented and click the **Save** link.

In most cases one payment type will be used to pay the full amount of the **Balance** due.

If the payment is split between two payment types you will need to record the remaining payment by repeating the steps above.



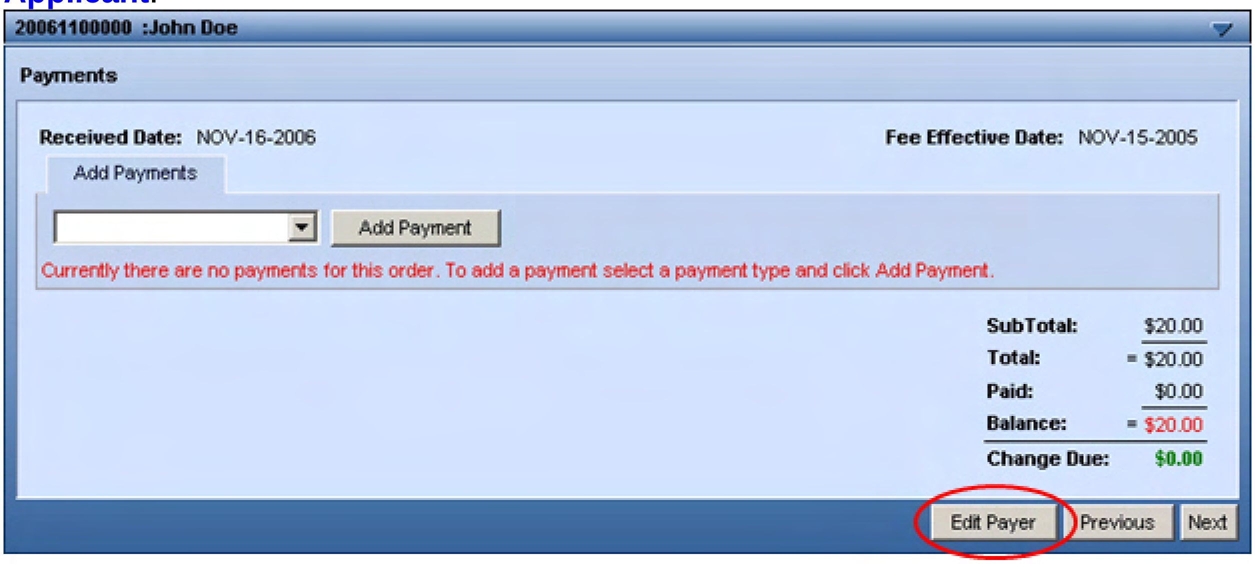
Once the payment is saved the page will refresh showing the updated payment and **Balance** due. Notice also the **Change Due** line. If there had been an overpayment, as would be the case if a customer offered a $50 bill to pay a $20 balance, the amount due back to the customer would be displayed here.



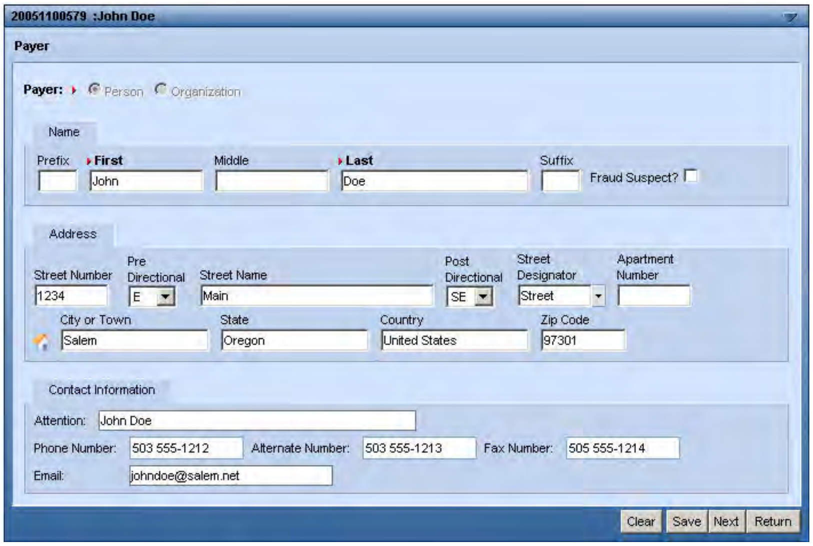
As shown in the image above, we have now reduced the **Balance** due to $0. Notice also that the navigation buttons at the bottom of the page are now enabled. Select **Next** to proceed to the **Summary** page.

If the **Payer** and the **Applicant** are not the same person the payer information can be added. For example, a Funeral Home may request a certified copy on behalf of the surviving spouse. In this event, the **Applicant** is the surviving spouse. However, since the Funeral Home will be presenting payment, they are considered the **Payer**.

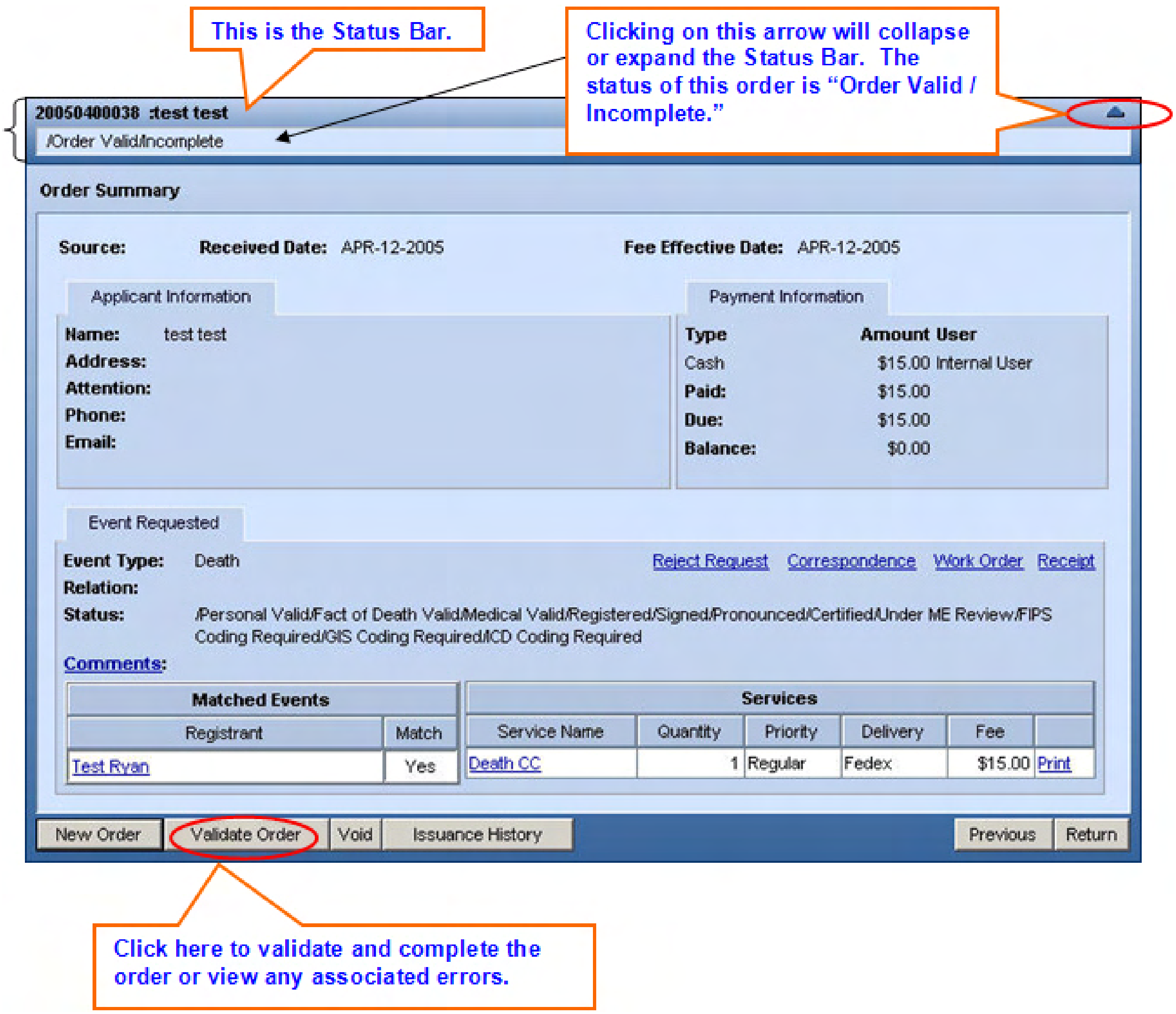
If the **Payer** and the **Applicant** are not the same person or entity, then click the **Edit Payer** button. This will allow you to change the **Payer** without also changing the **Applicant**.



Click the **Edit Payer** button above to launch the **Payer** page, shown below. Complete this page for the Payer and select **Save**. Then, select **Payments** from the **Order Processing Menu** to proceed with the order.

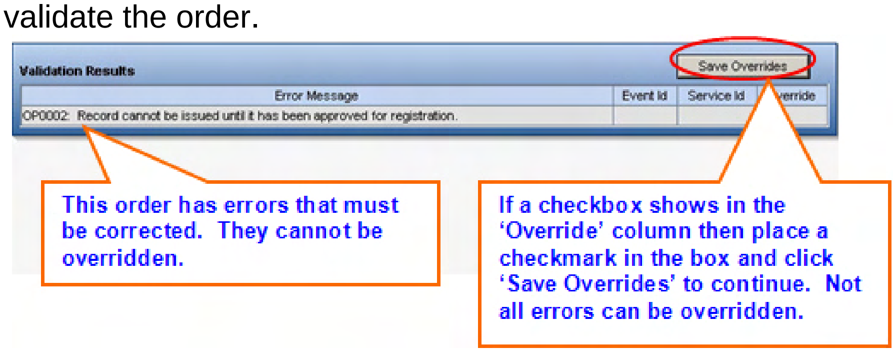


Locate the **Validate Order** button at the bottom of the **Order Summary** tab.
Click on the **Validate Order** button. This will check your order for errors. If there are no errors reported then your order is valid and will be processed. You can also check the status of an order by clicking on the arrow on the **Status Bar**:



If an order is invalid you will not be able to issue the vital record until the order is corrected. For invalid orders, an error message or messages will appear at the bottom of the page. If the errors can be overridden, a checkbox will appear in the **Override** column next to the override message. To override the error, click the message checkbox and then click the **Save Overrides** button and validate the order.

If the error cannot be overridden, correct the error return to the **Summary** page and re-validate the order.



There are certain circumstances under which you should not release a record and you will only know that by reviewing the record's status bar and the status bar of the order.

Order Summary and Status

The information in the Order Summary section is the same as described on the Fast Order form.

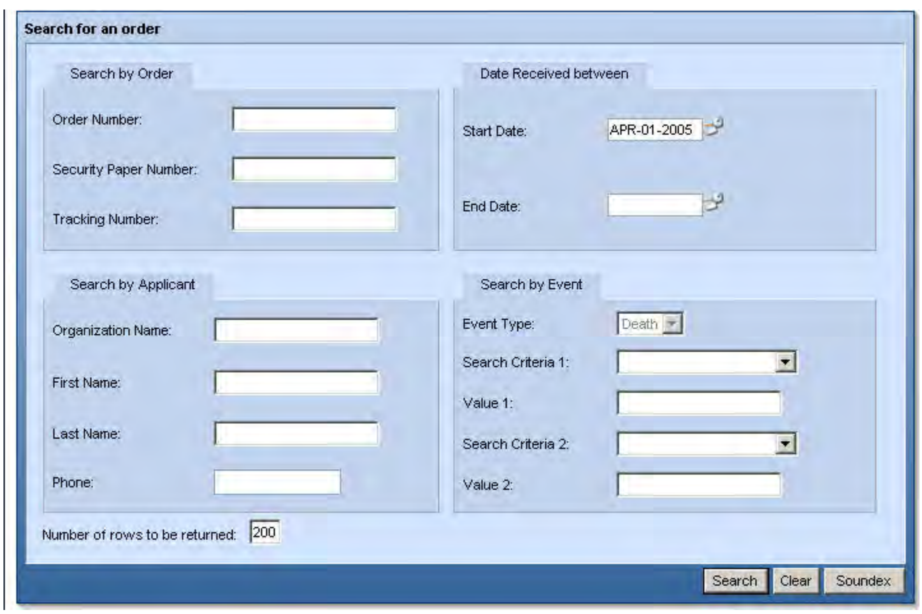
Issue

The information on the Issuance page is the same as described on the Fast Order form.

Search for an Existing Order

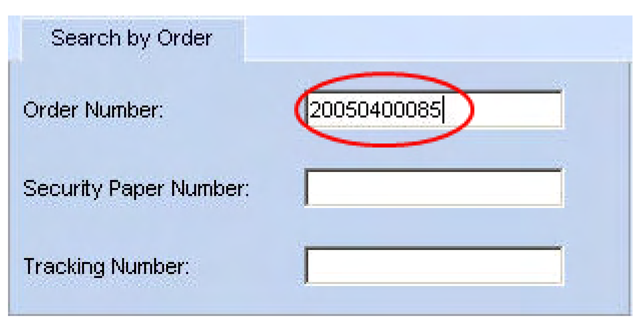
In previous exercises we went through the steps necessary to create a new **Order**. This section describes how to search for and access a previously entered order.

Open the **Main Menu** and select **Order Processing > Search**. The **Search for an order** page shown below will open.

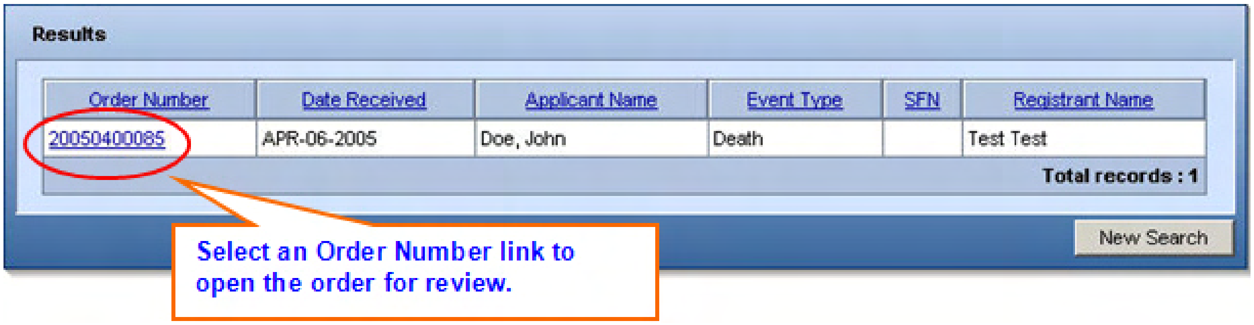


There are 4 search options to choose from: **Search by Order**, **Date Received Between**, **Search by Applicant**, and **Search by Event**.

To **Search by Order**, you must input at least one of the requested pieces of information: **Order Number**, **Security Paper Number**, or **Tracking Number** as shown in this example and click on the **Search** button at the bottom of the page.

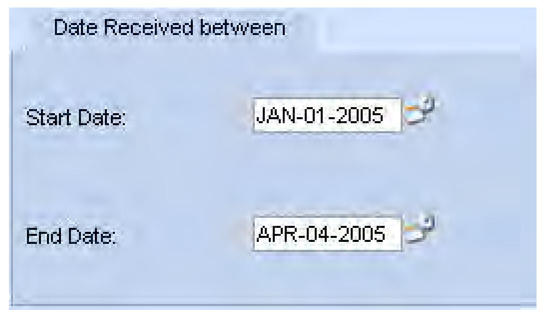


This search returns the following results:

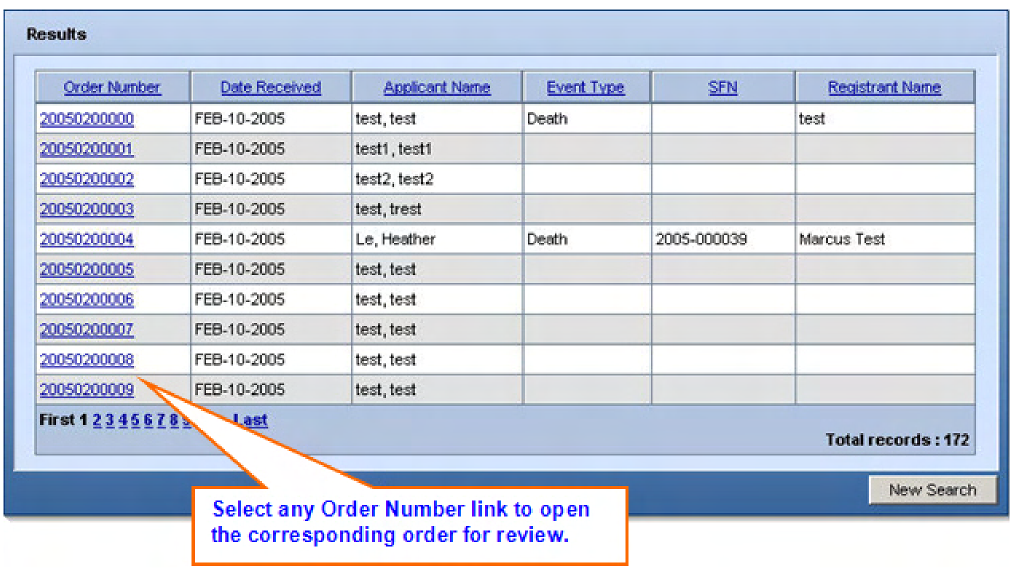


To open this order, just click on the **Order Number** link.

To search based on **Date Received Between**, you must enter a valid range of dates. If the **End Date** is earlier than the **Start Date** then no results will be returned. Also, if a **Start Date** is used without an **End Date** then only those orders requested on that specific date will be returned. Click the **Search** button at the bottom of the page to proceed.



This search returns the following results:

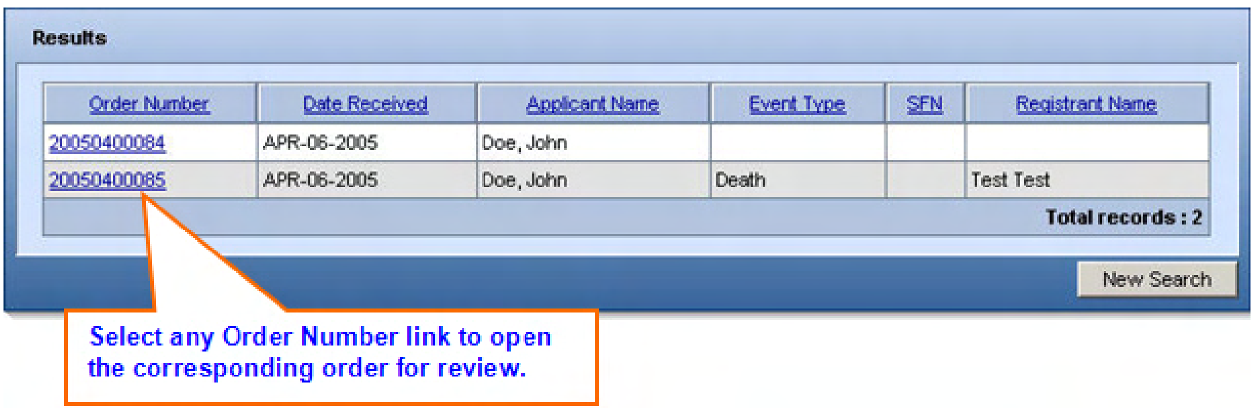


Note: It is possible to search using an End Date without a corresponding Start Date. However, that search would return all orders entered up to that date. The resulting list of orders would likely be too large to be useful.

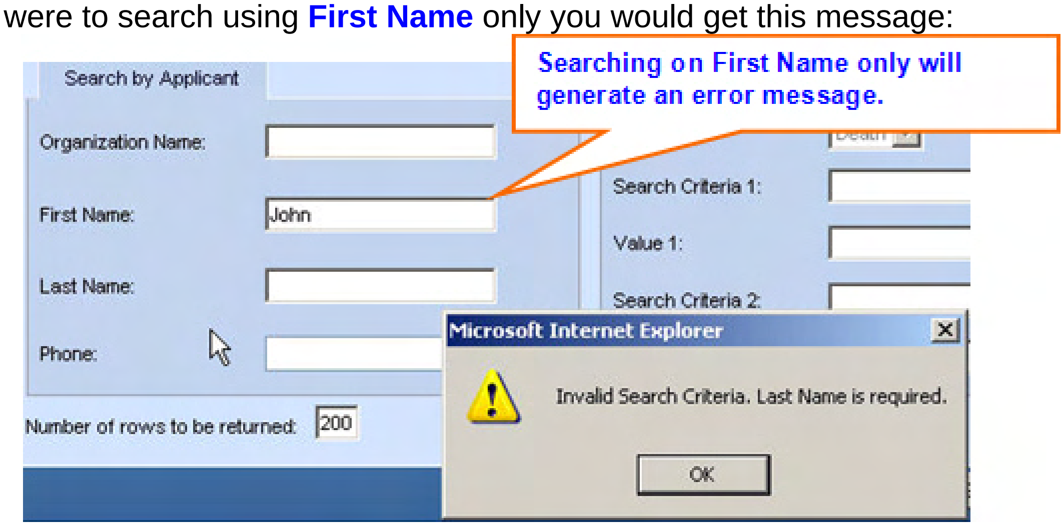
To search by **Applicant**, you must input at least the applicant's **Last Name**. However, to reduce the number of orders it is highly recommended that both **First Name** and **Last Name** be used.

Supplying additional information such as **Phone Number** and/or **Organization Name** would help to narrow down the results even further. Click the **Search** button at the bottom of the page to proceed.

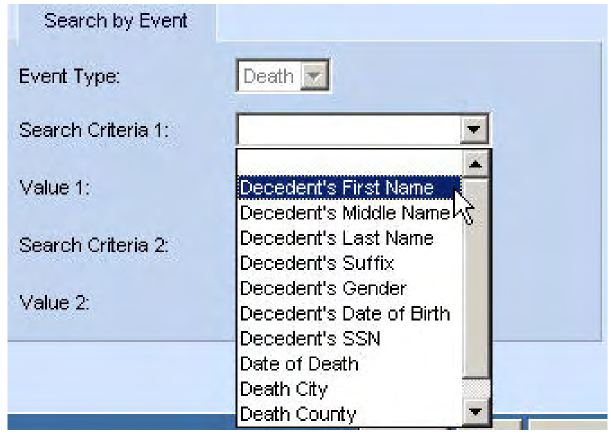
This search returns the following results:



If you were to search using **First Name** only you would get this message:

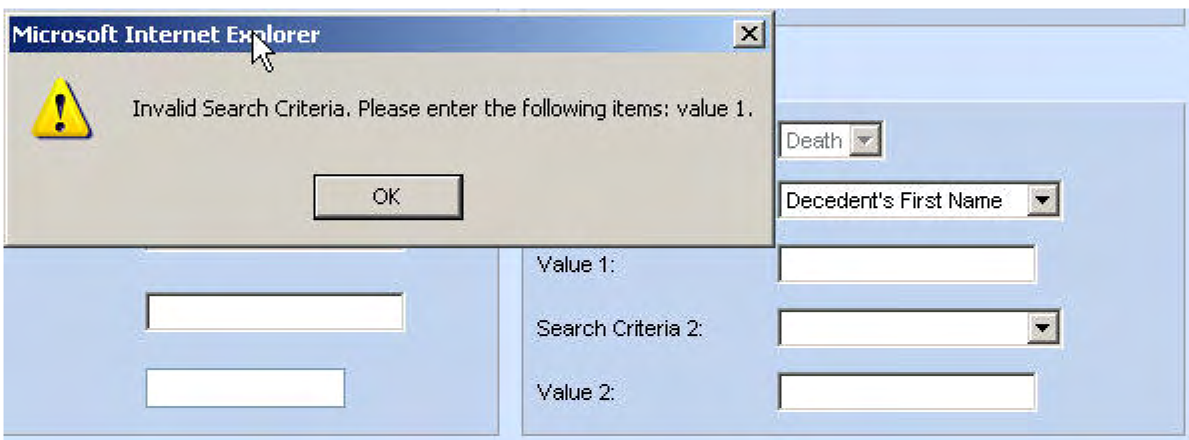


To search for an order by the event requested you must first select an event from the **Event Type** dropdown list.

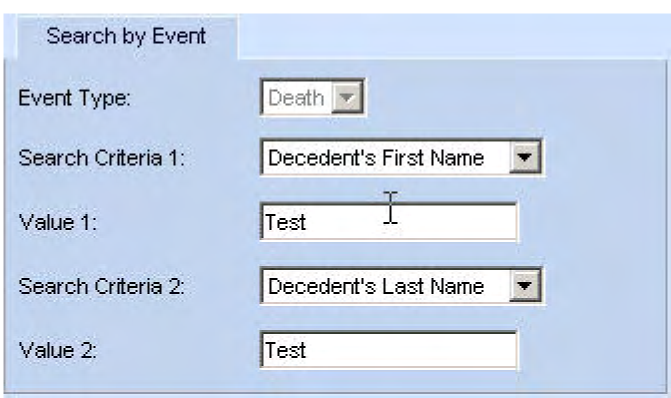


Next, make a selection from **Search Criteria 1** and key in the corresponding value in **Value 1**. For example, if you select **Decedent's First Name** for **Search Criteria 1** then you would enter the decedent's first name in **Value 1**.

You must use at least **Search Criteria 1** with corresponding **Value 1** data. Otherwise, you will see this error message:



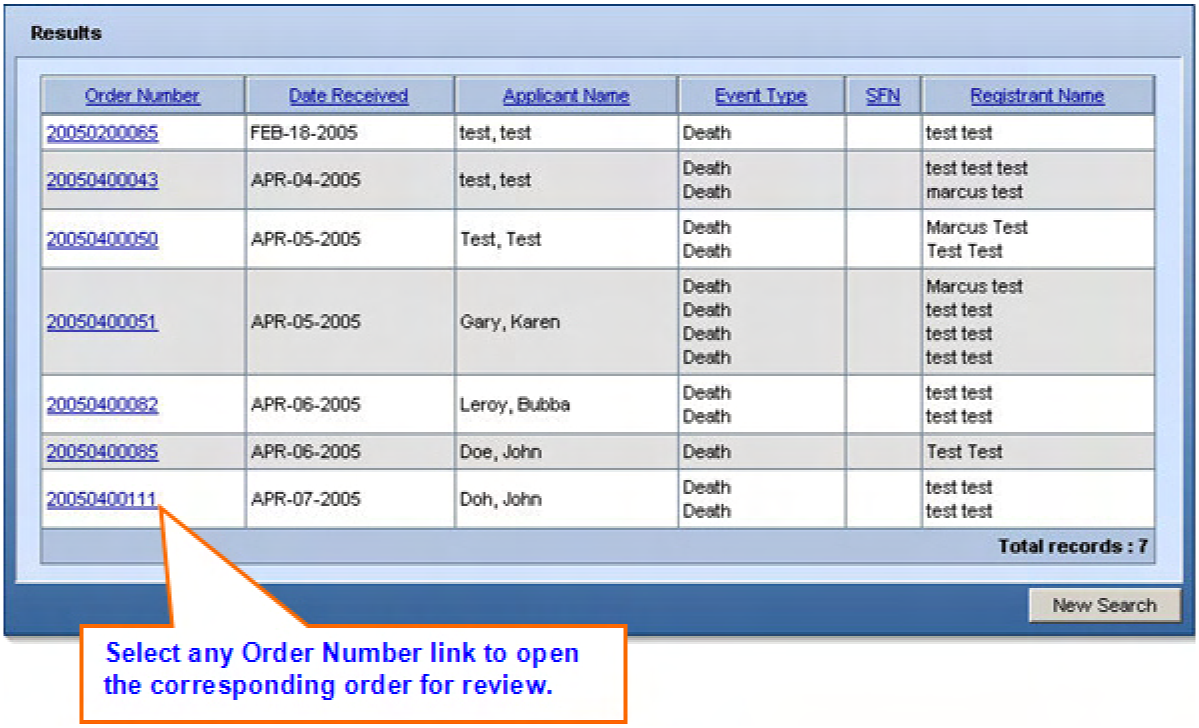
It is not necessary to use **Search Criteria 2** and **Value 2** – even when searching on **Decedent's First Name**. However, providing more information now will help limit the number of orders returned making it easier to locate the desired order.



In this example we have input information for both **Decedent's First Name** and **Decedent's Last Name**.

Click the **Search** button at the bottom of the page to proceed

This search returns the following results:



Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20050200065	FEB-18-2005	test, test	Death		test test
20050400043	APR-04-2005	test, test	Death Death		test test test marcus test
20050400050	APR-05-2005	Test, Test	Death Death		Marcus Test Test Test
20050400051	APR-05-2005	Gary, Karen	Death Death Death Death		Marcus test test test test test test test
20050400082	APR-06-2005	Leroy, Bubba	Death Death		test test test test
20050400085	APR-06-2005	Doe, John	Death		Test Test
20050400111	APR-07-2005	Doh, John	Death Death		test test test test

Total records : 7

Regardless of the search method used, clicking on the corresponding order number will always open the **Order Summary** page for that order.

Locate a Vital Record

In certain cases you may need to use the **Registration Pages** to **Locate a Vital Record** to print a **Working Copy** of the Record that is not going to be Issued to the public. To locate a record in the **OVERS** application before starting an order, you can use the menu sidebar: **Life Events > Birth (or Death) > Search**.

Once you locate the record, you can preview it to ensure that it is the correct Record. Once you have finished previewing the Record you can click on the highlighted name of the Registrant to review the first page of the record. Once in the record you will only be able to access the Child (or Decedent) page, Comments, and Print Forms (working copies only). These pages provide you the ability to review the Registrant information on the Record, add Comments to the Record and/or Print a Working copy of the birth or death record.

Essentially the view of a record you see in the Life Events section of OVERS will provide you with only the information necessary for determining if a record is in the system and for determining if the temporary white copy of the record should be shredded (record is registered in OVERS) or a fully electronic record has been filed for a death in your county.

Although this method can be used to find any existing records in your County, (whether partially complete or fully complete) it is not recommended as a search tool as the same information can be found through the order process.

A Few Words About Security Paper

Security paper (also called Intaglio paper) is sold to the County by the State to be used for the sole purpose of printing certified copies of vital records. Intaglio paper is used to ensure that certified copies cannot be altered without detection and so the distribution, storage and tracking of intaglio paper must be tightly controlled to prevent fraudulent use.

Once you receive an order of Intaglio paper you should call the State office to confirm you received the paper. The unused paper should be stored in a locked and secure area and each piece of paper used should be tracked. As soon as you let the State know that you have received the paper, the State will enter the assigned inventory to your office account in OVERS. Until the paper is assigned to your office in OVERS you will not be able to complete an OVERS order with that paper.

The State of Oregon requires that all orders of vital records be processed using **OVERS** and that every issued record be matched to a corresponding piece of Intaglio paper.

Each piece of intaglio paper has an inventory number and those numbers are tracked in OVERS. When you issue a certified copy of a vital record it is very important to make sure that the Intaglio paper number listed in the OVERS order is the same as the Intaglio paper number that was actually given to the customer.

If a piece of paper is damaged before being issued call the State office and request that the paper be voided (or removed) from the State's master inventory. If you must void an order after a certified record has been issued, you must retrieve the original copies from the customer before voiding the order in OVERS.

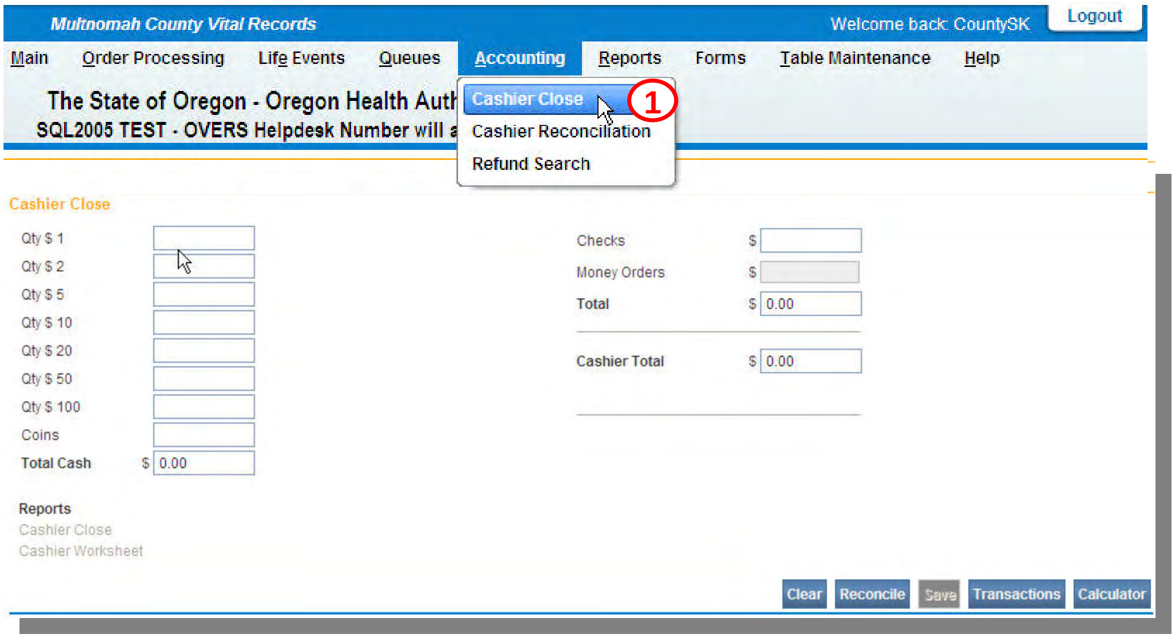
After the original copies have been shredded and the order voided in OVERS, a new order can be entered into OVERS and new copies can be issued to the customer. Once an order is voided in OVERS the record and Intaglio paper associated with that order is voided and will no longer be considered a legal record.

Cashier Close

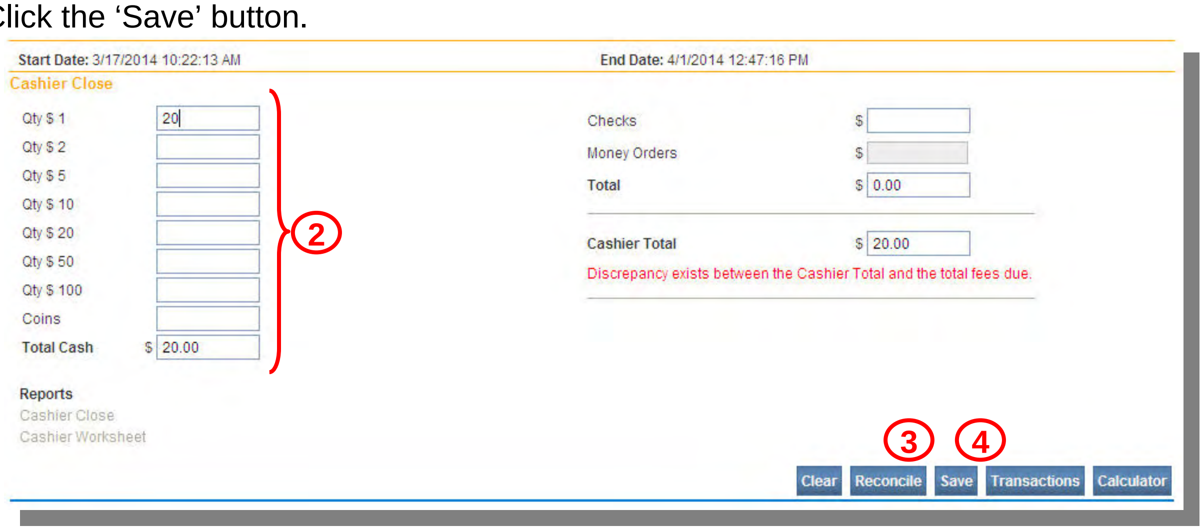
Cashier close is a process that requires a manual start in OVERS. Cashier Close is a reconciliation tool for revenue and payment types for orders. Running Cashier Close on a regular basis we can use many of the financial reports OVERS provides to review revenue flow, transaction summaries, and overall order processing and revenue intake by each individual staff person who completes orders in OVERS. The Cashier close process can be run at anytime but you will want to run it routinely and at the time outlined by your manager according to your departmental procedures.

To run Cashier close:

1. Navigate to the accounting menu and click on ‘Cashier Close’.
    - The page will refresh and display the Cashier close information.



2. Enter a cash amount. The amount of monies enetered is not important since we do not use the accounting to reconcile the actual money collected. (County offices use separate accounting programs to record all money collected for services provided.)
3. Click the ‘Reconcile’ button once the cash amount is entered.
    - Once reconciled, you will see a message just below the Cashier total that says “descrepencies exist…”.
4. Click the ‘Save’ button.



By running Cashier Close on a regular basis you will be able to:

- Ensure your ability to implement a planned future enhancement which will allow funeral directors to directly input orders into OVERS.
- The funeral director electronic order process will:
    - Ensure that the order is already matched to the appropriate death registration.
    - Make your work easier because the funeral director will enter all application pieces for you– applicant information, applicant relationship, number of records, and payment. This means you can simply process the Order directly from the summary page or in a batch from the Order Processing or Issuance work queues.