Database Application for Vital Events

A LexisNexis® VitalChek® Network Inc. Product

One Integrated System for All Your Vital Records Business Needs

User Guide
Arizona

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Introduction

The purpose of this document is to provide a walk-through of the features of the DAVE™ Death and Fetal Death modules. These features include registration, amendments, order processing, and issuance of death and fetal death events. DAVE™ also supports common forms of reports required by State and Local Registrars and is available 24 hours per day, 7 days per week.

User Guide Conventions

To aid in understanding the content of this guide the following conventions are used:

Information icons in blue highlight boxes feature additional information regarding each topic

Caution icons in yellow boxes warn of actions that may result in a negative user experience

Red warning icons focus on actions that are prohibited in the application

>> *Italics* reference labels, buttons, hyperlinks, and navigation paths

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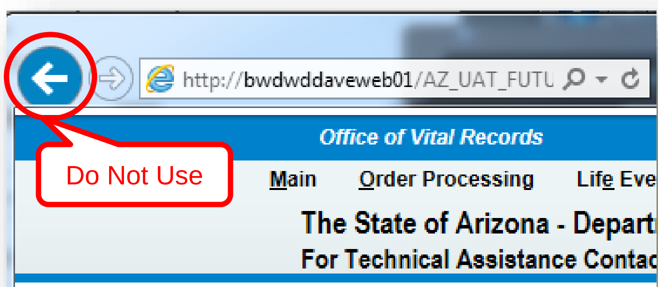
1. General Recommendations

1.1 Web Browsers

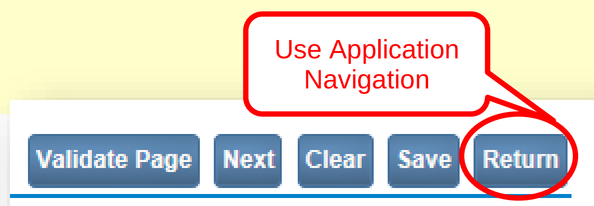
DAVE™ is a web-based application leveraging the latest browser technology. While the most recent version of Microsoft's Internet Explorer (IE) is recommended, DAVE™ also supports the use of Mozilla/Firefox and Chrome browsers.

> IE is the only browser that currently supports the DAVE™ Biometric feature.



⚠ As a general rule, do not use a browser's back button while working in the DAVE™ application. This could result in the loss of data.

⚠ Where available, use the page specific *Back*, *Return* or *Cancel* buttons to return to a previously viewed page.

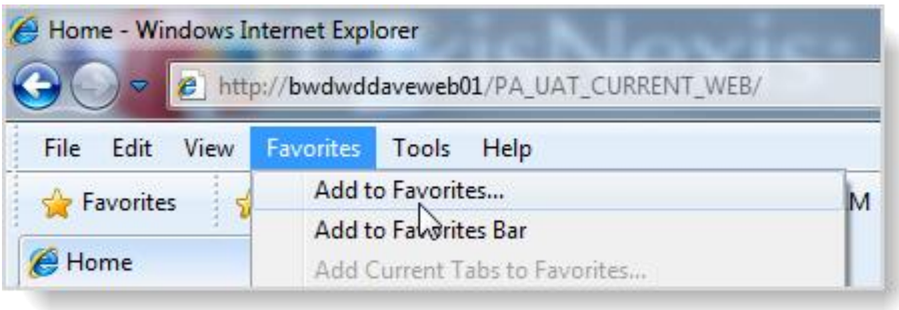


1.2 Creating an IE Favorite or Desktop Shortcut

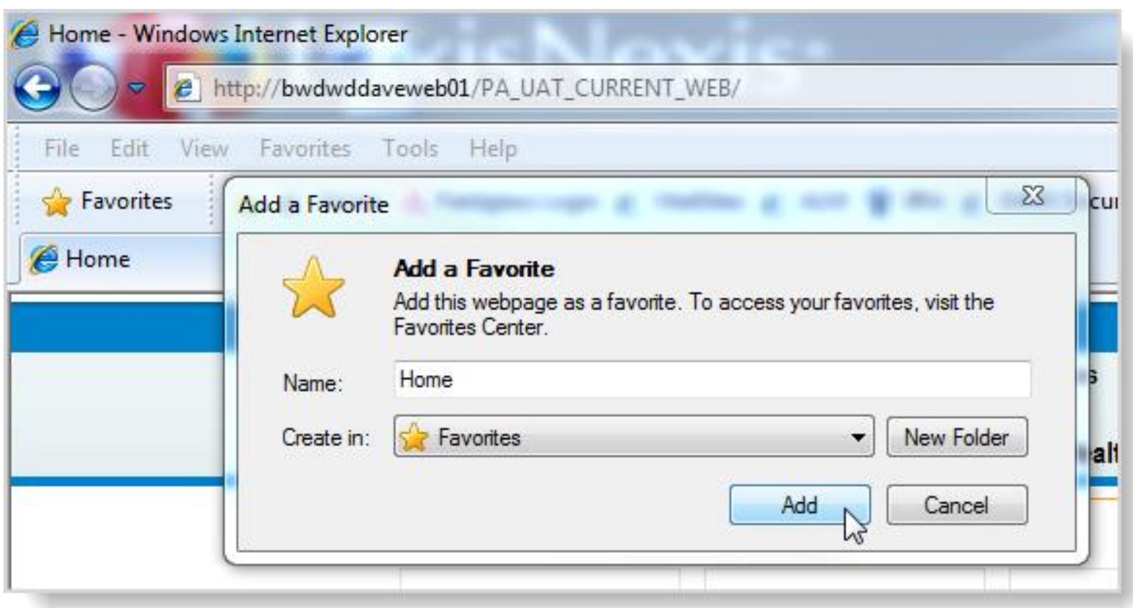
Create an IE Favorite or Desktop Shortcut for easy one-click access to the DAVE™ application.

Steps to Add a Favorite:

1. Navigate to the DAVE™ website
2. From the IE Toolbar select *Favorites* > *Add to Favorites*

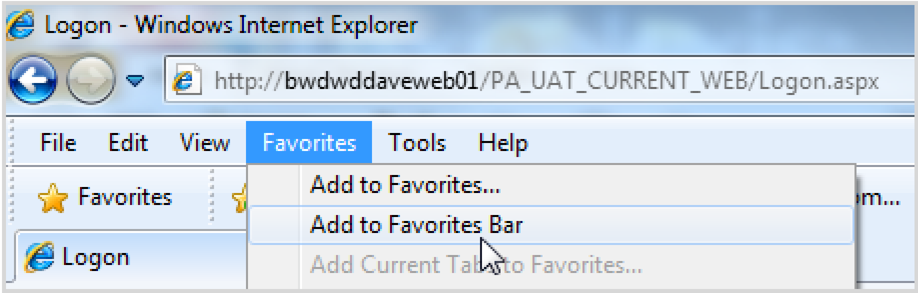


3. Select the *Add* button on the *Add a Favorite* dialogue box. The *Name* fills automatically and can be changed if desired. The link is now saved in the IE Favorites List.

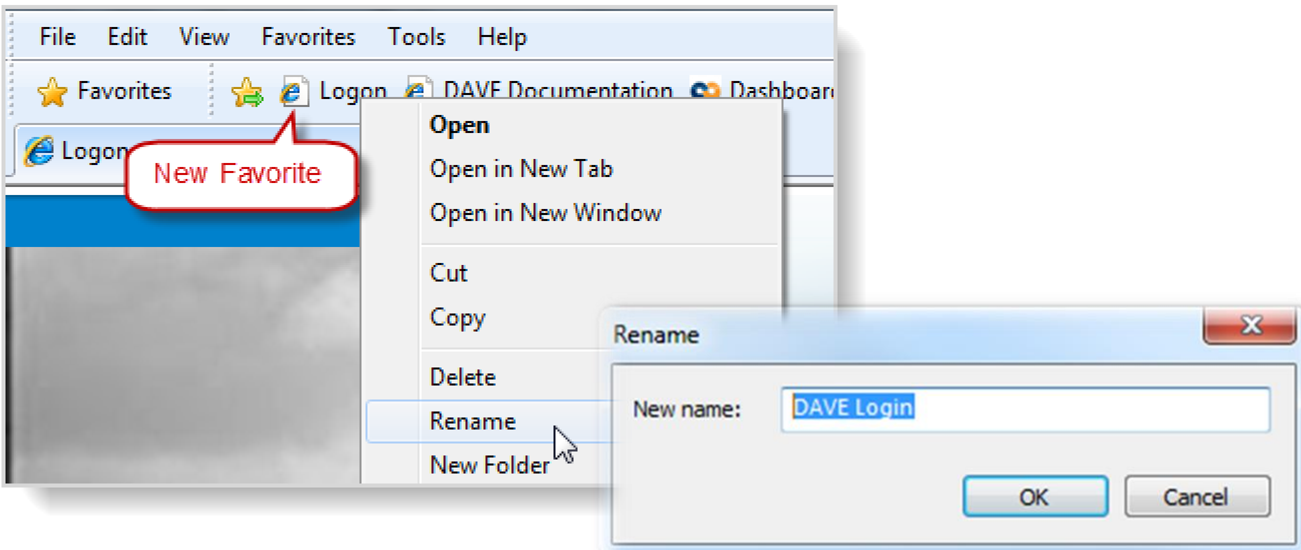


Steps to Add to Favorites Toolbar

1. Navigate to the DAVE™ website
2. From the IE Toolbar select *Favorites* > *Add to Favorites Bar*

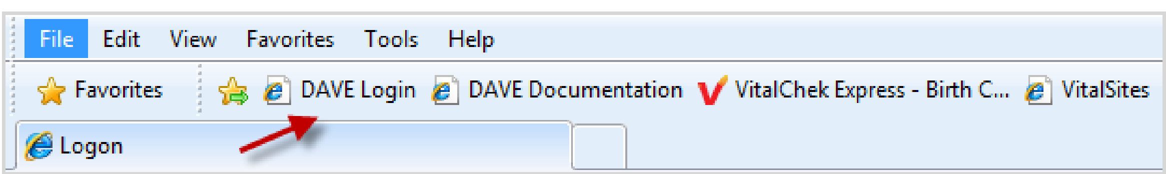


3. Right-click on the Logon item that now appears in the Favorites toolbar and select rename



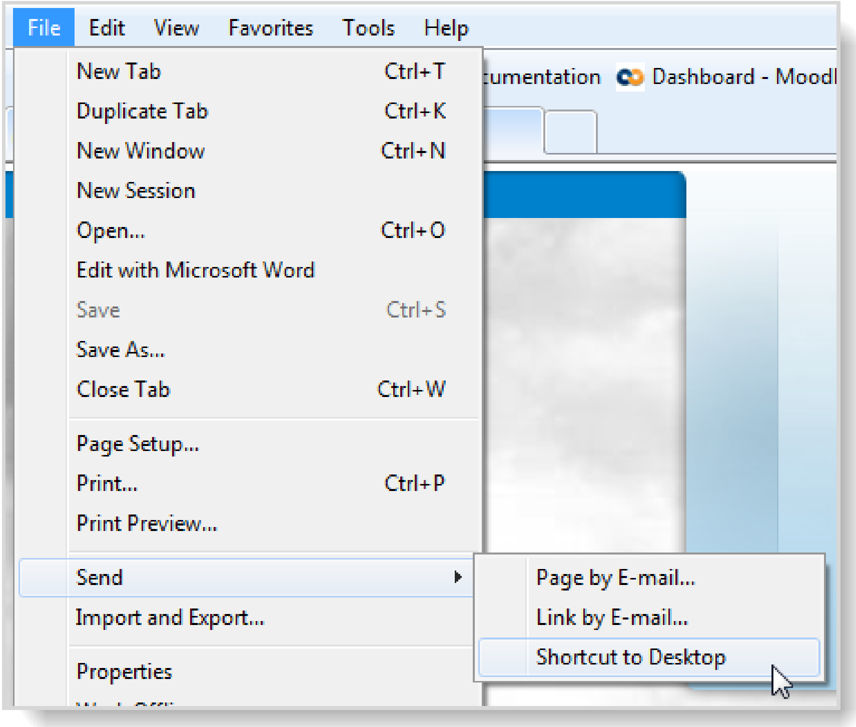
4. Enter a name that is an easy to remember reference to the DAVE^{TM} website and select OK

The New Favorites Toolbar Shortcut is ready for use



Steps to Add a Desktop Shortcut:

1. Navigate to the DAVE^{TM} website login page
2. From the IE toolbar select *File > Send > Shortcut to Desktop*



3. This creates an icon on the desktop that quickly launches IE and opens the DAVE™ login page. Right-click on the icon and select rename to rename the shortcut.

2. Getting Started

2.1 Logging into DAVE™

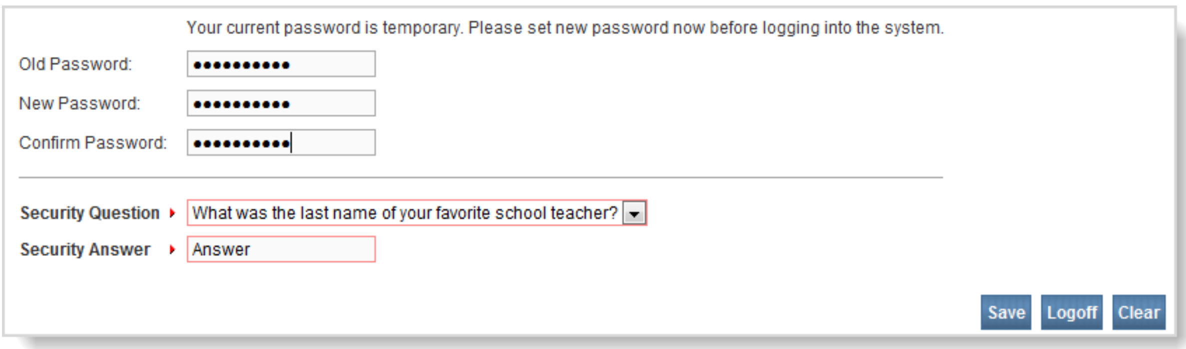
2.1.1 First time Login

1. Navigate to the DAVE™ login page. Enter the *Username* and temporary *Password* assigned by the system administrator. Select the *Login* button.

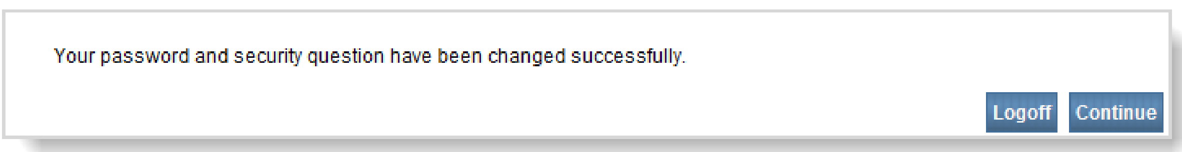
2. If the user logging in is associated with more than one office or location, a list of available offices will be presented. Select the desired office.

3. At first login, or to update or change a password, the user will be presented with the following prompts:

   - Enter the temporary/current password in the *Old Password* field
   - Create and enter a new password in the *New Password* field
   - Re-enter the new password in the *Confirm Password* field
   - Choose a *Security Question*
   - Enter a *Security Answer*
   - Choose *Save*



4. The confirmation page will display. Select *Continue* to be taken to the Home Page or Logoff to exit DAVE™.



See section *2.6 Change Password* for information regarding changing existing passwords

2.1.2 Forgot Password

Passwords must be at least 8 characters in length and must contain at least one uppercase letter and one number. The use of “Strong” passwords is recommended.

A “Strong” password:

- Is at least 8 characters long and contains uppercase and lowercase letters, numbers and keyboard symbols
- Does not contain a complete word
- Is significantly different from previous passwords
- Does not contain your user name, real name or company

At login, if an incorrect *Username* and/or *Password* is entered, the application displays an error message:

Steps to follow if a user has forgotten their password:

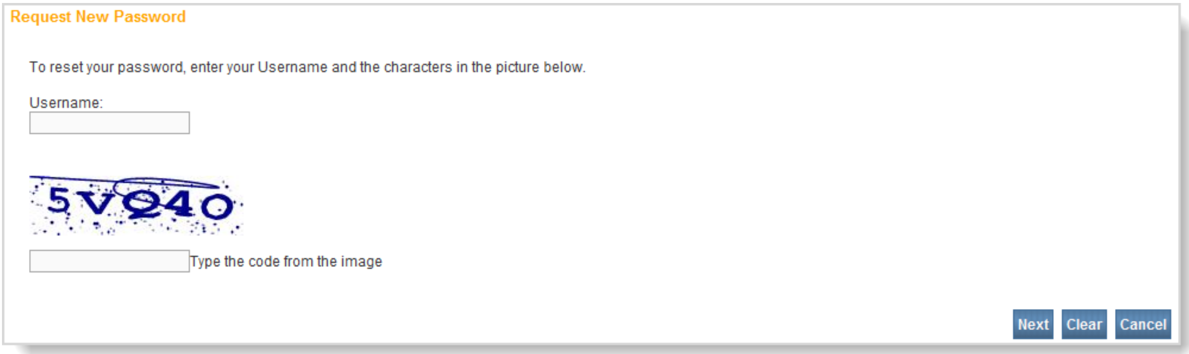
1. Select the *Forgot your password?* link to open the Request New Password page

2. Enter the *username*

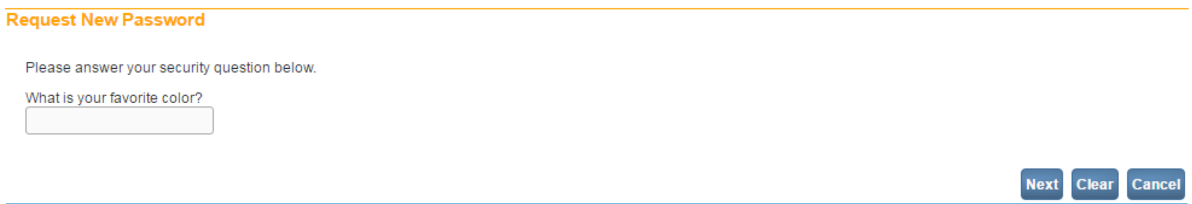
3. Type in the code displayed by the security Captcha

4. Select the Next button

A CAPTCHA is a challenge-response test most often placed within web forms to determine whether the user is human. The purpose of CAPTCHA is to block form submissions by spambots, automated scripts used to post spam content on commercial websites.



5. If the Username is found in the system and the Captcha image identified correctl, the user's Security Question will be displayed. Key in the correct answer to the security question and select the Next button



6. The user will be allowed 3 attempts to correctly answer the security question. If upon the third attempt the answer remains incorrect, an error message will be displayed and the user will need to contact the system administrator to have their password reset.

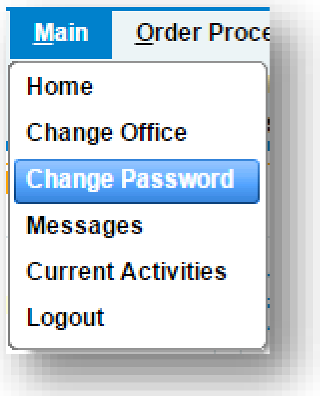
7. If the answer to the security question is correct, an email will be sent to the email address on file for the user within the DAVE™ system. This email will contain a temporary password that the user can then use to login.

> Once a user receives a temporary password, they should follow steps in *section 2.1.1, First Time Login,* to set a new password.

2.1.4 Change/Update Password

Steps to Change Password:

1. To update an existing password, from the main menu select *Main > Change Password*



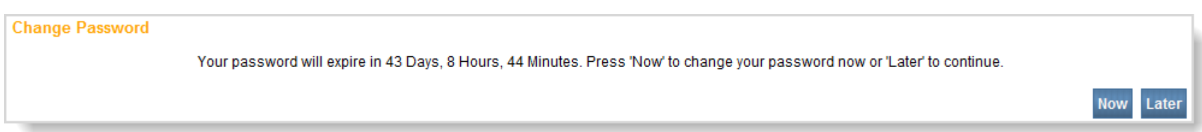
User can now follow steps in *section 2.1.1, First Time Login,* to set a new password.

Steps to Update Password:

Every 90 days you will be required to reset your password. As the 90 day mark approaches, a pop-up message will appear at login displaying the days remaining until password expiration and asking if you want to change your password *Now* or *Later*.

1. Selecting Later will take you to the Home Page

2. Selecting Now will take you to the Password Reset page



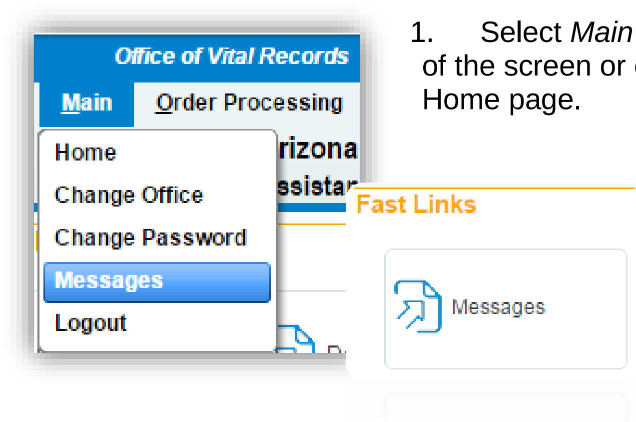
2.3 Messages

The completion of a case most often depends on the input and/or actions of more than one user. DAVE™ provides the ability to send internal messages and external emails to communicate outstanding needs. Some messages are initiated by system users, while others are system-generated.

It is a recommended practice to check Messages on first login and throughout the work day

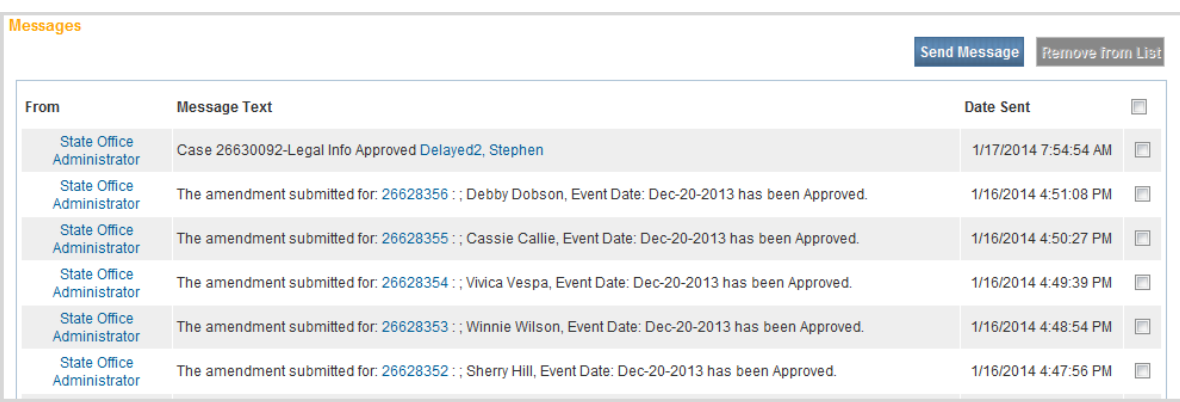
2.3.1 View Messages

Steps to View Messages in **DAVE™**:



1. Select *Main* > *Messages* from the Main Menu at the top of the screen or choose the *Messages* Fast Link icon on the Home page.

2. The *Messages* pane displays all messages received by the current user

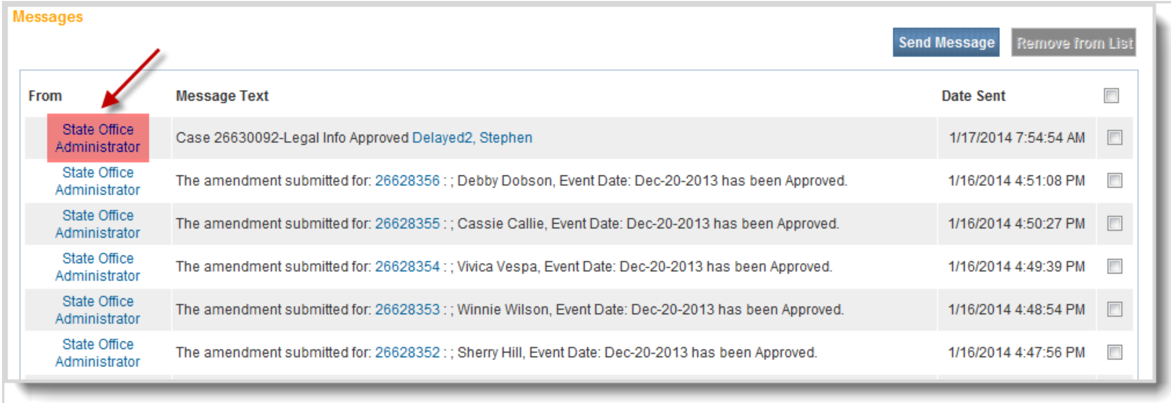


Messages

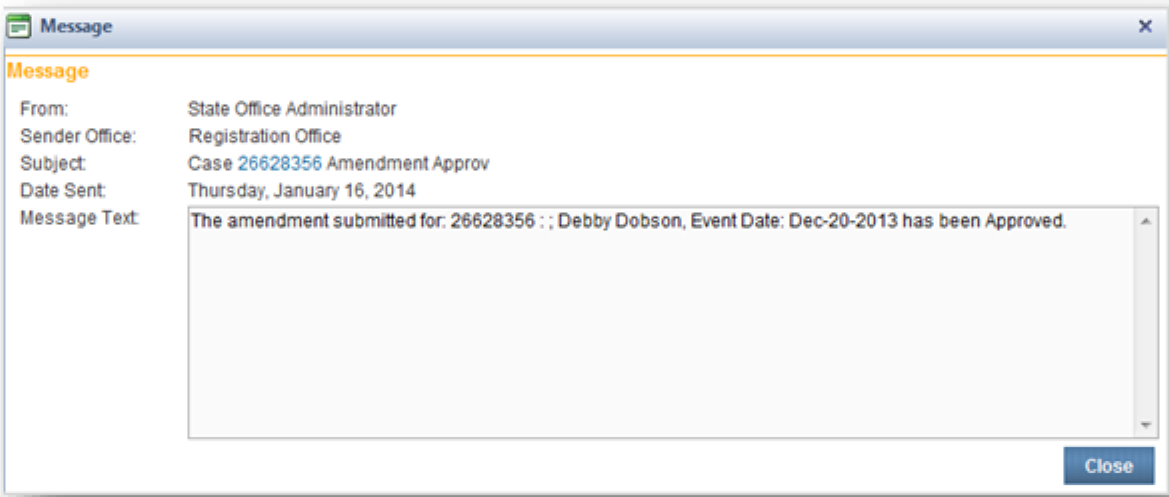
Send Message | Remove from List

From	Message Text	Date Sent	
State Office Administrator	Case 26630092-Legal Info Approved Delayed2, Stephen	1/17/2014 7:54:54 AM	
State Office Administrator	The amendment submitted for: 26628356 : ; Debby Dobson, Event Date: Dec-20-2013 has been Approved.	1/16/2014 4:51:08 PM	
State Office Administrator	The amendment submitted for: 26628355 : ; Cassie Callie, Event Date: Dec-20-2013 has been Approved.	1/16/2014 4:50:27 PM	
State Office Administrator	The amendment submitted for: 26628354 : ; Vivica Vespa, Event Date: Dec-20-2013 has been Approved.	1/16/2014 4:49:39 PM	
State Office Administrator	The amendment submitted for: 26628353 : ; Winnie Wilson, Event Date: Dec-20-2013 has been Approved.	1/16/2014 4:48:54 PM	
State Office Administrator	The amendment submitted for: 26628352 : ; Sherry Hill, Event Date: Dec-20-2013 has been Approved.	1/16/2014 4:47:56 PM	

3. To view a message Select the sender's name in the *From* column



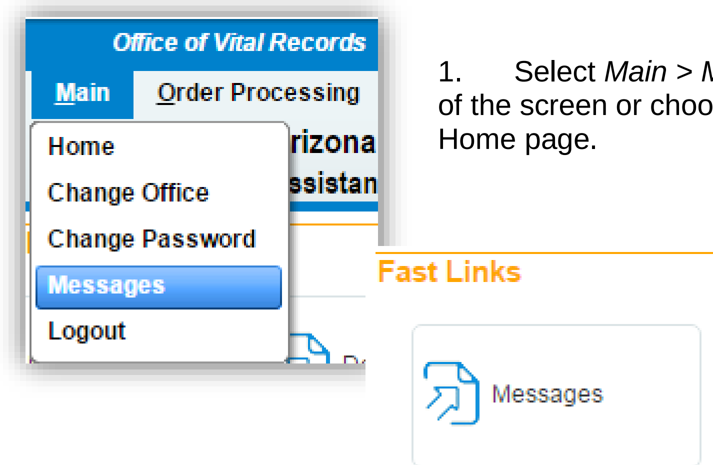
4. The message displays. Choose *Close* to return to the list of messages.



2.3.2 Create and Send Messages

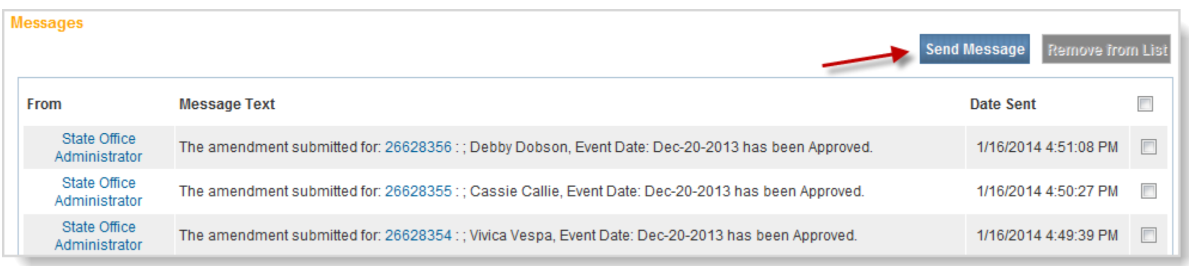
Messages and emails can be sent to a single user, multiple users, or all users within a facility.

Steps to Create and Send Messages:

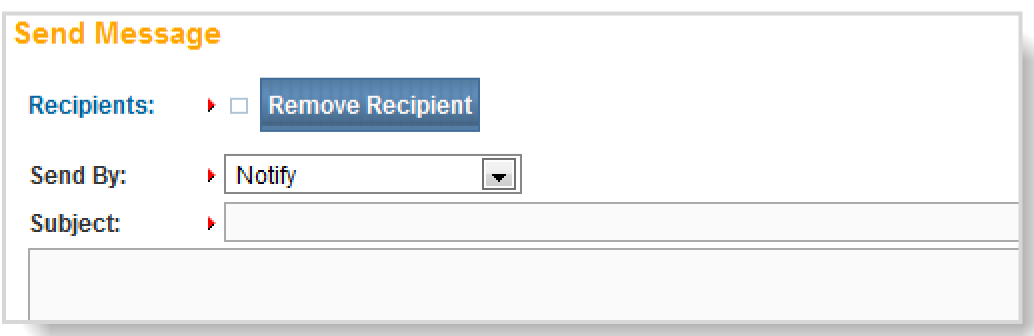


1. Select *Main* > *Messages* from the Main Menu at the top of the screen or choose the *Messages* Fast Link icon on the Home page.

2. In the *Messages* pane select *Send Message* to compose a new message.



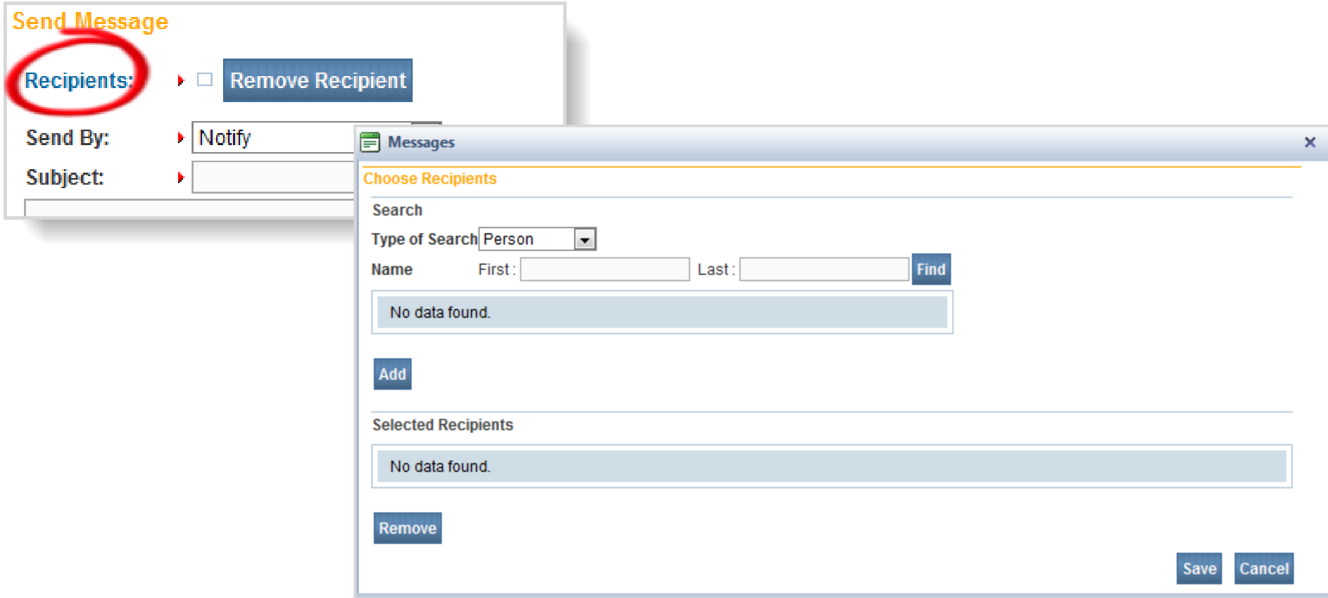
3. A blank message displays with three required header fields: *Recipients*, *Send By* and *Subject*



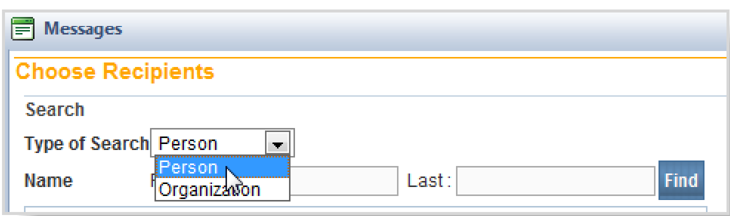
Red arrows indicate required fields

Steps to Add Recipients:

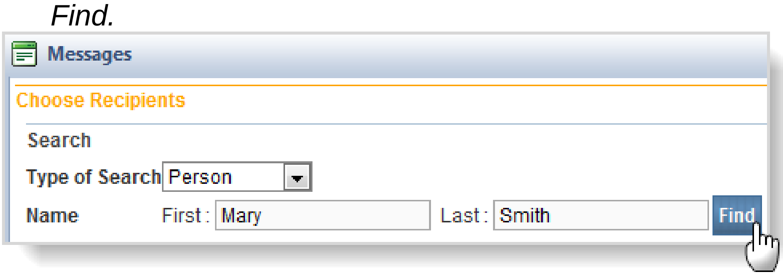
1. Select the *Recipients* link in the message header to display the *Choose Recipients* popup



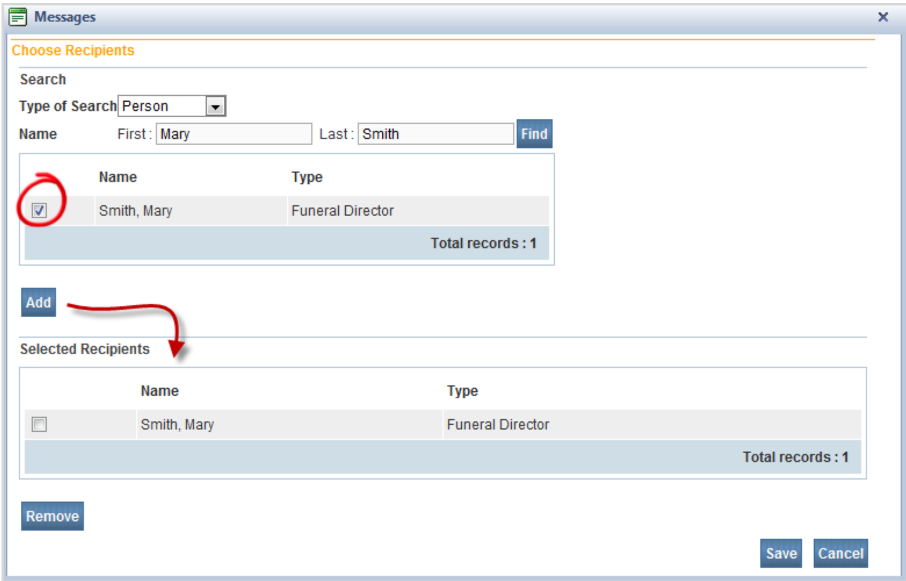
2. To send a message to a specific user, Choose *Person* from the *Type of Search* dropdown list.



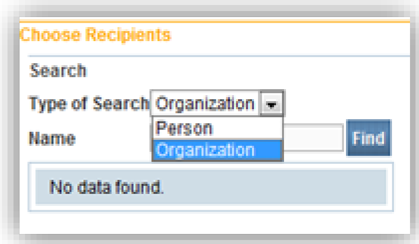
3. Enter the *First* and *Last* name of the person you wish to send a message to then select *Find.*



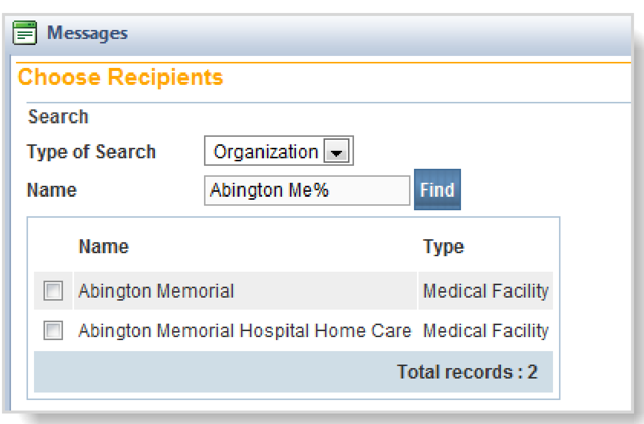
4. A successful search will return the *name* and *user type* of the person you wish to send a message to. To add this person as a *Selected Recipient*, select the checkbox next to the name and then select *Add*.



5. To send a message to all users within a facility, select *Organization* from the *Type of Search* dropdown list.

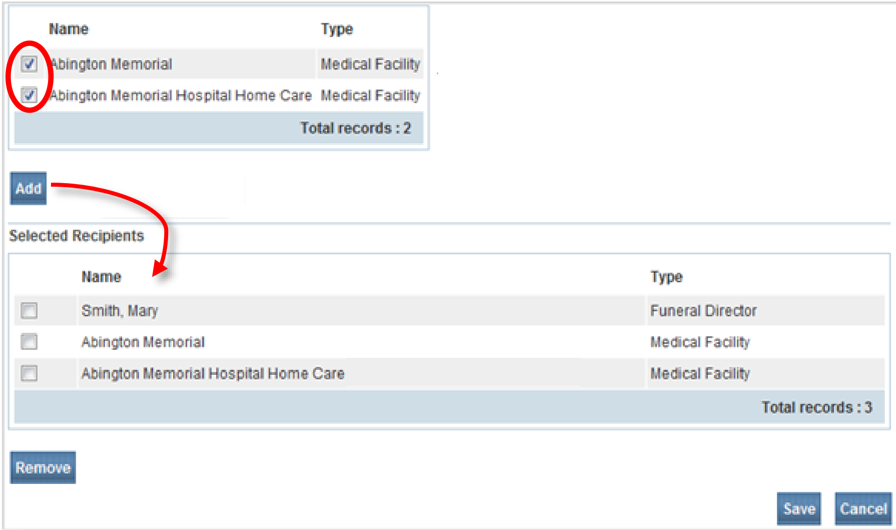


6. Select *Find* to return all organizations stored in the DAVE™ database that match the search criteria entered or broaden the search by entering a partial organization name followed by the wildcard (%) character

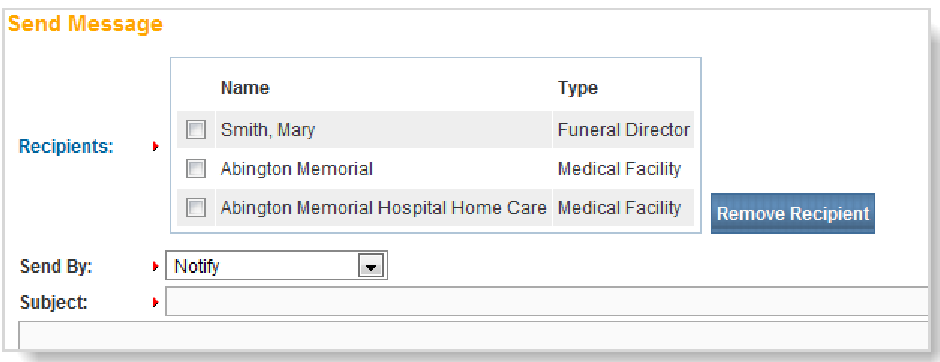


⚠ Use caution when sending a message to an organization as the message is sent to every user associated with the selected facility. If the message is not meant for every user at that location, it is recommended that the *Person* search be used instead.

5. To add an organization as a *Selected Recipient*, select the checkbox next to the organization name and then select *Add*.



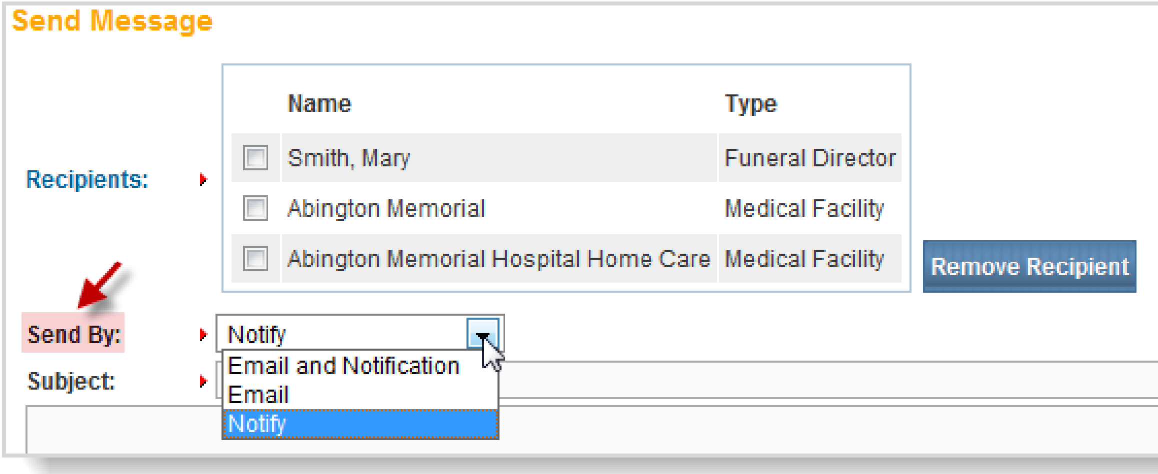
6. Select *Save*, and three recipients, one person and two organizations, will now appear in the message *Recipients* list.



To **delete** a recipient, select the checkbox next to the desired name and select the *Remove Recipient* button.

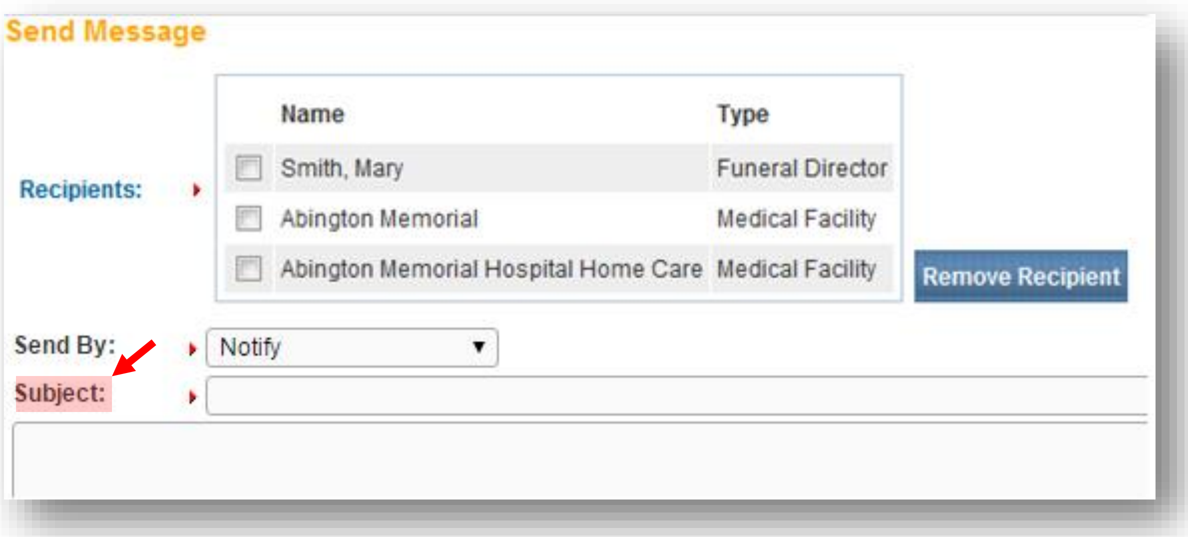
To **add** additional recipients, repeat the same search process described above. DAVE™ will retain the selected names and allow the user to perform further searches.

7. The second required message field to complete is *Send By* which determines how the message will be delivered.

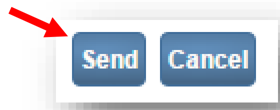


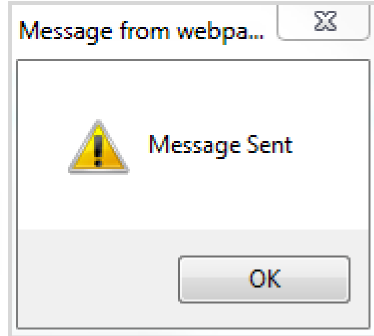
Send By Option	Action
Email and Notification	Sends the message via external e-mail and internal messaging.
Email	Sends the message to an external e-mail address only.
Notify	Sends message via internal messaging only.

8. The last required field is entry of a *Subject* in the subject line.



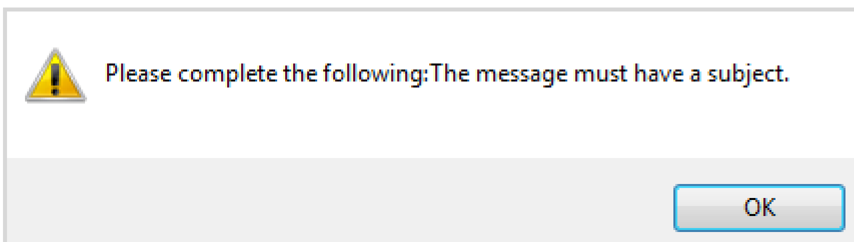
9. Once all required fields are completed, add the text of your message and select *Send* to send the message to the listed recipients. A confirmation pop-up will then display.





Selecting the *Cancel* button will close out the message without sending and return the user to the Home page.

Upon selecting *Send*, If any required field is not yet complete, the application will prompt the user to fill out the missing data.

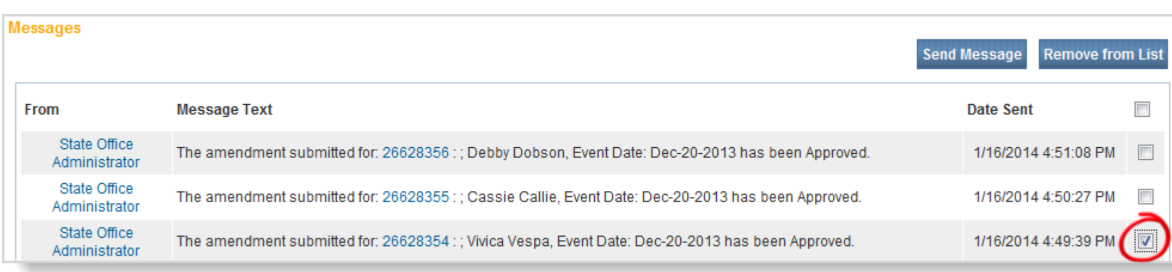


2.3.3 Delete Message(s)

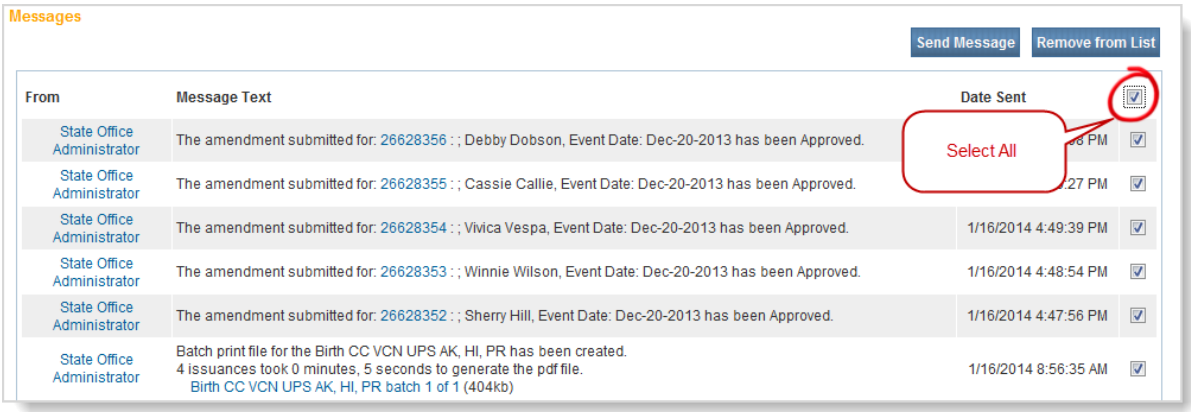
Deleted messages cannot be restored. Do not delete a message unless absolutely sure it will not be needed later.

Steps to Delete Message(s):

1. To delete a single message, select the checkbox next to the message. This enables the *Remove from List* button. Select *Remove from List* to delete the message.



2. To delete all messages, select the “Select All” checkbox to the right of the *Date Sent* column header. This selects all messages. Select *Remove from List* and all messages will be deleted.



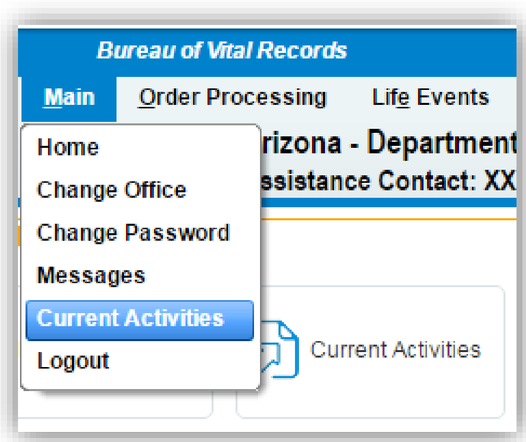
If the “select all” checkbox was marked in error, simply re-select. The checkmarks will be removed from the messages.

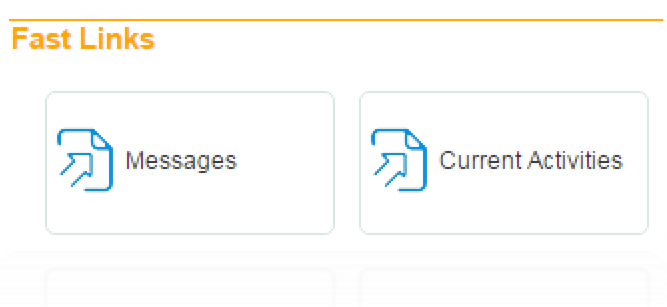
2.4 Current Activities

The Current Activities page displays a list of work queues containing records requiring attention. The listing is unique to each user and serves as a “to do” list. As with *Messages*, frequent monitoring of *Current Activities* is encouraged.

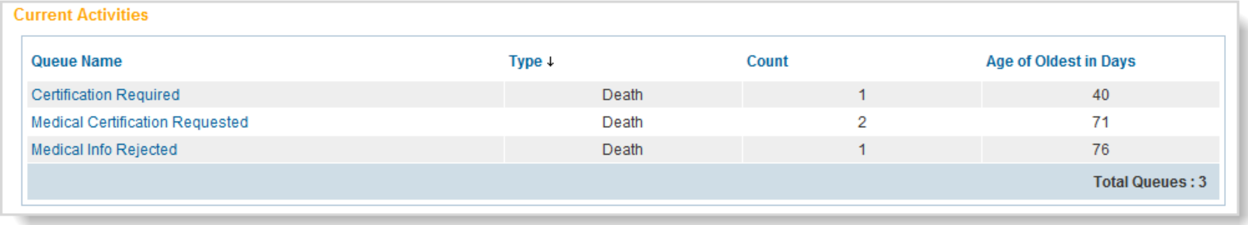
Steps to Access Current Activities:

1. From the Main Menu select *Main* > *Current Activities* or select the *Current Activities* Fast Link icon on the Home Page





1. The Current Activities page lists queue names, the type of records in each queue, case count and age of the oldest case within each.



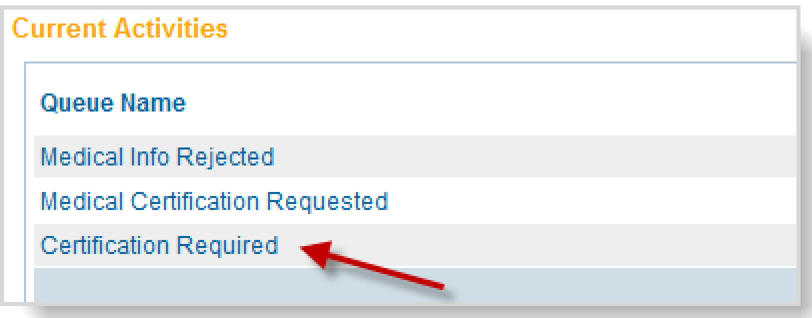
Current Activities

Queue Name	Type ↓	Count	Age of Oldest in Days
Certification Required	Death	1	40
Medical Certification Requested	Death	2	71
Medical Info Rejected	Death	1	76
			Total Queues : 3

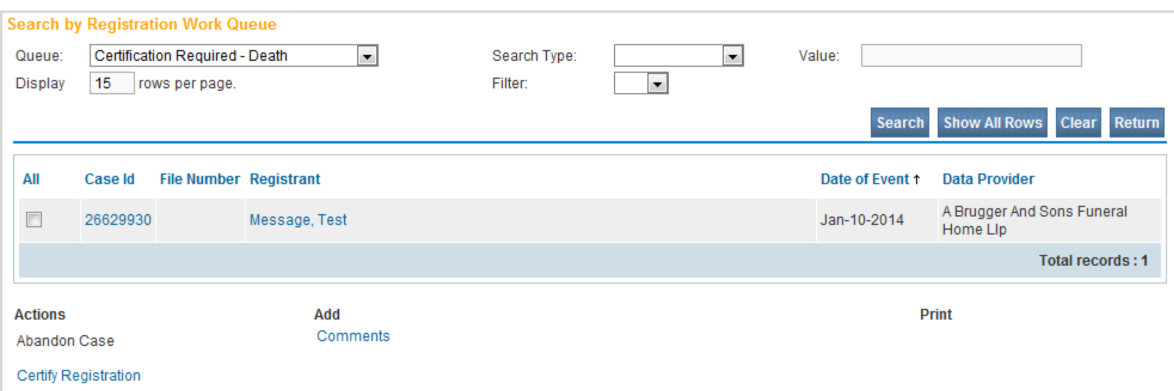
If a queue does not contain cases, it will not be displayed.

If a user does not have security access to a specific queue it will not be displayed.

2. Selecting a *Queue Name* allows access to records within the queue. In this example, the *Certification Required* queue is selected.



3. Upon selection, the *Search By Registration Work Queue* page opens displaying a list of all records within the selected queue.



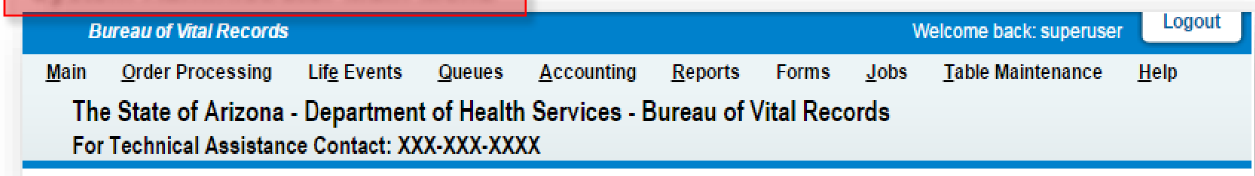
See section *13 Queues* for more information regarding use of queues in DAVE™

2.5 Main Menu

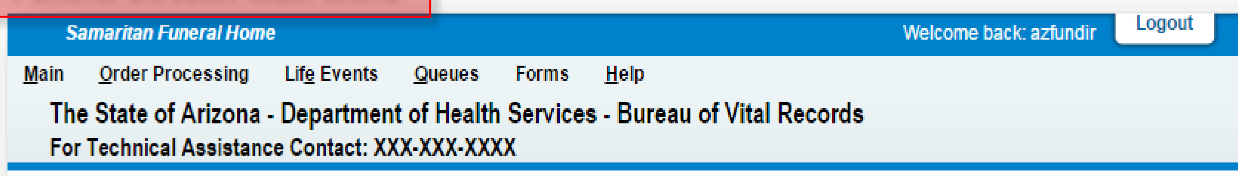
The menu at the top of every screen is referred to as the Main Menu and is used to navigate the DAVE™ application.

The Main Menu is dynamically created and will display differently for different user types based on assigned user security privileges.

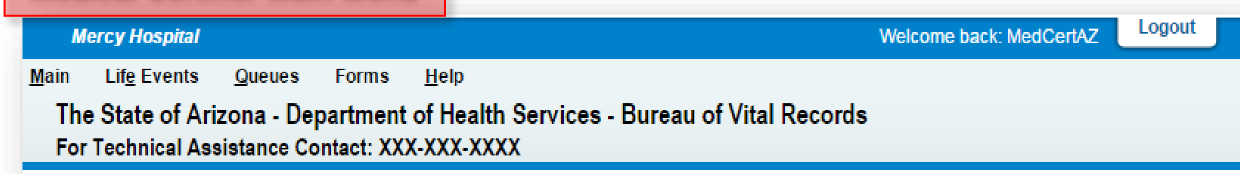
System Administrator *Main Menu*



Funeral Director *Main Menu*



Medical Certifier *Main Menu*

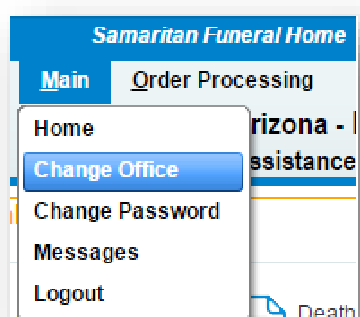


2.6 Change Office

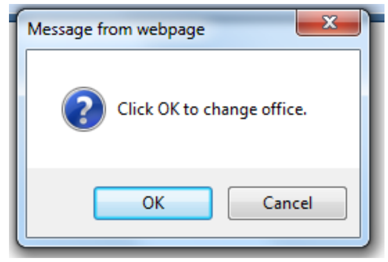
Some users may be authorized to view and/or edit cases in more than one facility. The *Change Office* feature allows users to log out of one location and begin working cases in another.

Steps to Change Office:

1. From the Main Menu, select *Main* > *Change Office*



2. A confirmation pop-up will be displayed. Select the *OK* button to change office



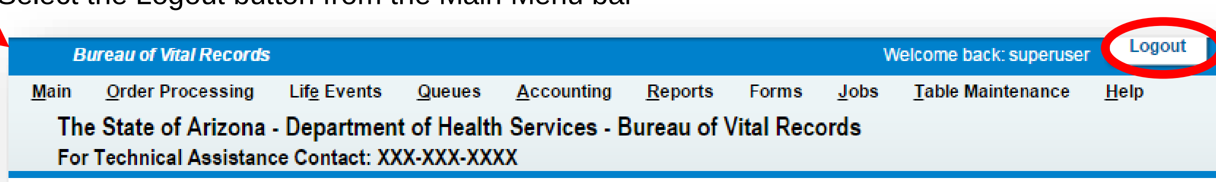
3. The Login page appears with a list of facilities associated with the user. Re-enter the password and select a new office

2.7 Logging Out of DAVE™

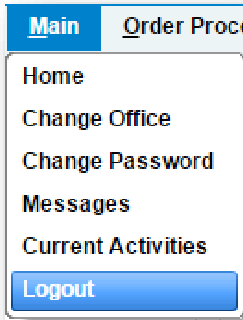
It is good practice to log out of the DAVE™ system whenever you step away from your desk or workstation.

There are two ways to logout of DAVE™:

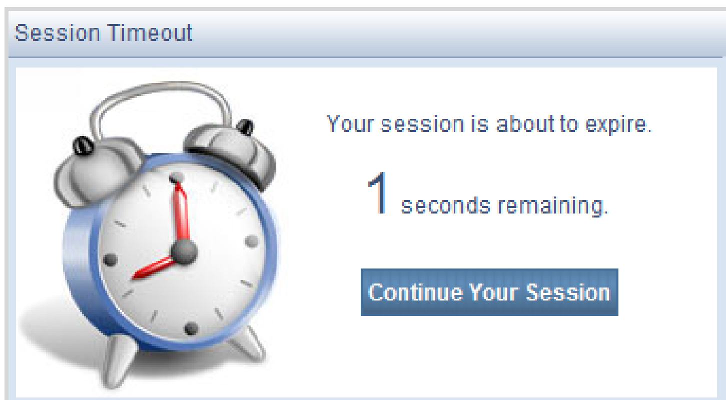
1. Select the Logout button from the Main Menu bar



2. Select *Main* and *Logout*

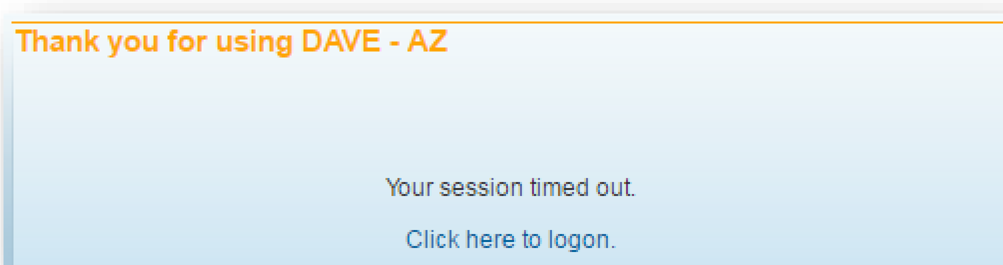


If a user is inactive for longer than 90 seconds, the system will present a session timeout warning:



The session time out allows the user 90 seconds to select Continue Your Session to avoid being automatically logged out.

If no interaction from the user occurs during this timeframe, the user's DAVE™ session will expire.



Selecting *Click here to logon* returns the user to the Login page.

3. Site Navigation

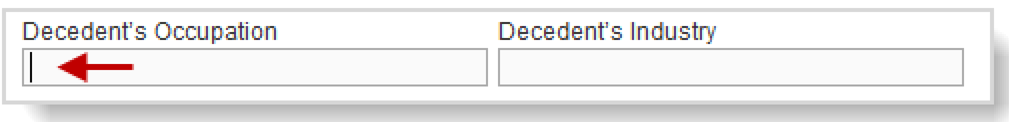
Using the computer keyboard as a navigation aid is an efficient way to move through the DAVE™ application. To effectively navigate in this way, it's important to understand *Focus*.

3.1 Focus Navigation

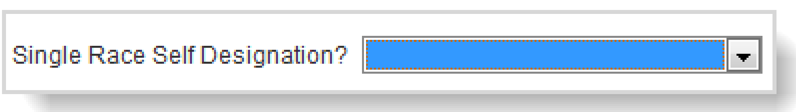
Focus determines which field or user interface control is ready to receive user action.

What is a User Interface Control? Any element on a web page a user can interact with such as a text box or dropdown menu

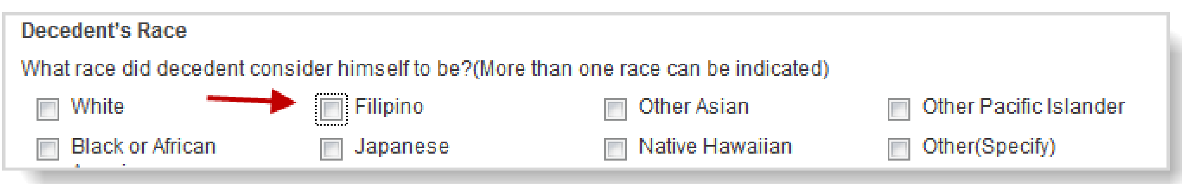
If an empty text box has focus, a flashing cursor appears in the far left hand side of the field. As the user types, text is displayed.



If a Dropdown menu has focus it will be highlighted in blue. Once the dropdown is opened, a user can choose from a list of values.



A Checkbox or Radio Button will be surrounded by a dotted line when it receives focus. The box can then be selected by the user by pressing the keyboard space bar.



Passing the Focus: Moving between these controls is a matter of passing the focus. This is accomplished by using the following keyboard shortcuts:

- The *Tab* key advances the focus forward
- *Alt+Tab* (holding down the *Alt* key while pressing *Tab*) passes the focus back to the previous control.

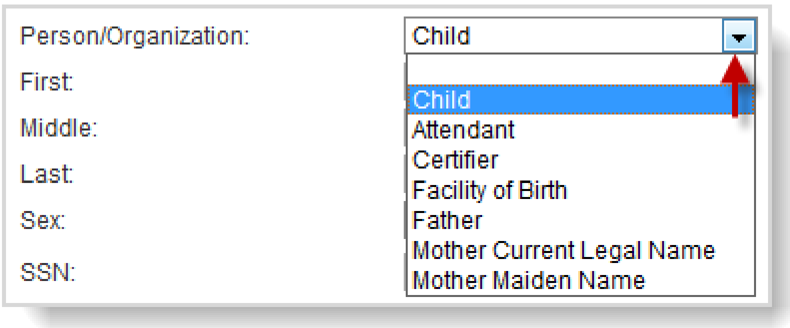
Every page is structured a little differently. Exactly where *Tab* and *Alt+Tab* send the focus will vary, but it should always advance logically from one control to the next.

3.2 Interactive Controls and Features

Standard and custom user interface controls are built into the DAVE™ application to assist users in entering data accurately and efficiently.

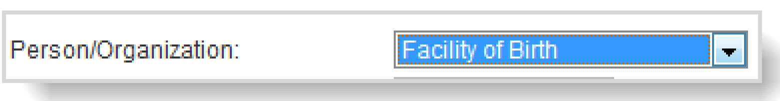
3.2.1 Dropdown Lists

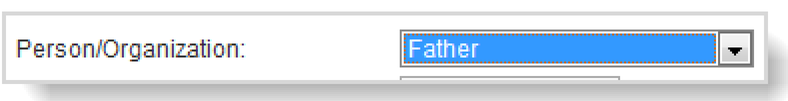
Dropdowns provide pre-defined lists of values, eliminating the need to manually key data. Select the down-arrow icon to display a list of selectable options. The value selected is passed to the text box field.



Dropdown Menu keyboard shortcuts:

1. *Choose an option without expanding the list:* If the dropdown is highlighted and the desired value is already known, simply type the first letter. For example, *F* could be entered to select *Father*. However *Facility of Birth* appears first. Choosing *F* again advances to the next value beginning with the letter *F*.





2. *Use a keyboard combination to open the list:* If the dropdown menu is highlighted, use the keyboard combination *Alt+Down-arrow* to open the list. *Alt+Up-arrow* closes the list.

3. *Navigate the list without expanding the dropdown:* When the dropdown menu is highlighted, use the keyboard's up and down directional arrow keys to scroll through the list.

3.2.2 Standard Date Format

DAVE™ uses a standard date format but is flexible enough to recognize and convert other formats users may enter. Formats accepted for conversion are illustrated below:

Input Formats	Typed As:	System Converts to:
MM-DD-YYYY	02052014	Feb-05-2014
MM/DD/YYYY	02/05/2014	Feb-05-2014
MMDDYYYY	02052014	Feb-05-2014
MonDDYYYY	Feb052014	Feb-05-2014
Mon/DD/YYYY	Feb/05/2014	Feb-05-2014
Mon-DD-YYYY	Feb-05-2014	Feb-05-2014

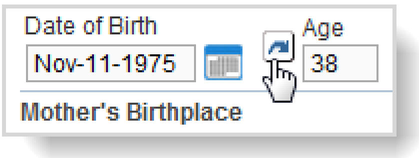
Selecting F12 will automatically key today's date into the selected date field

Entry of dates in any other date format will result in an error.

3.2.3 Icons and Controls

Standard and custom user interface controls are built into the DAVE™ application to assist users in entering data accurately and efficiently.

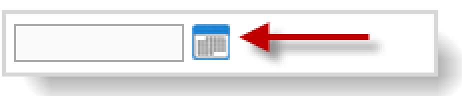
 **Auto-populate Button**: Automatically populates information in one field based on data entered in another. For example, based on data entered in the *Date of Birth* field, selecting the *Auto-populate* button calculates the age and populates the *Age* field.



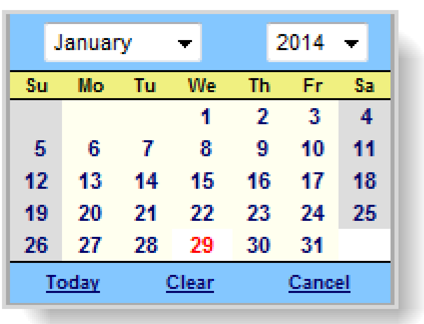
 **Calendar Icon**: Launches the interactive Calendar and is placed next to date entry fields.

The Interactive Calendar is an alternative to manually entering the date.

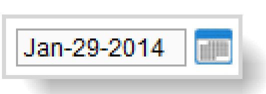
1. Launch the calendar by selecting the Calendar Icon next to the date entry field:



2. Select a *Month* and *Year* from the dropdown menus.



3. Select the specific day. Once the day is chosen, the calendar will close and enter the date into the date field.



> Selecting the calendar's *Today* link enters the current date in the date field. Pressing the F12 button on your keyboard does this as well.

Checkboxes: Checkboxes allow users to make one or more selections from a variety available options. To select or de-select a checkbox, simply click inside the box .

> If a *Checkbox* or *Radio Button* has focus:
>
> - Use the Spacebar to “press” and select the button, or
> - Use the Enter key to “press” and select the button

Buttons initiate various functions within the application. They are used to navigate the application, accept data input, write information to the database, and trigger the processing of underlying system code.

Fix Icon: Appears in the DAVE™ Validation frame only. Selecting this icon will place the focus or cursor in the item containing invalid information.

Label Control: Identifies a nearby text box or other control. Indicates what type of information is expected in that control.

LOV Icon: A DAVE™ specific search element that returns a grid of selectable data.

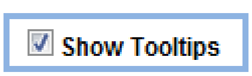
LOV Icon: A search tool used in the DAVE™ application.

LOV Eraser Icon: Removes values selected using the LOV search tool.

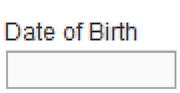
Place Search Icon: Launches a popup that facilitates the entry of city, state, county and/or country.

Radio Buttons: Allows the user to choose only one of a predefined set of options

Required Controls: All controls accompanied by small red arrows are mandatory and must be completed or attempts to save the page will cause a pop up error message to appear. The data must be completed before the user can continue.



Show Tooltips Checkbox: The Show Tooltips checkbox under the Help menu controls whether ‘hint’ text is displayed when hovering over an icon or control.



Text Box Control: Allows user to enter information that will be used by the program. Can be formatted to accept only text, a combination of text and numbers, numbers only, or dates.

First 1 2 3 4 5 6 7 8 9 10 ... Last

Table Paging: When a table of data contains more rows than can be displayed on a single page, DAVE™ provides a set of controls located at the bottom of the search results page that displays the page currently selected, the total number of pages of search results, and links to the other search result pages.

Death Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Sex	Place of Death	Date of Birth	
194		Alley, J	OCT-11-2016	Male	Burnside	DEC-01-1990	Preview
514	2016000021	Andy, Pete	OCT-28-2016	Female		APR-04-1987	Preview
176	2016000009	Anthony 33rd, Susan B.	OCT-09-2016	Female	Burnside	APR-17-1956	Preview
480		arerules, Joey	OCT-27-2016	Male		APR-14-1990	Preview
526	2016000022	Attacque, Blaccque Jacque	OCT-31-2016	Male	Burnside	JAN-21-1940	Preview
227		Bake, Clam	OCT-12-2016	Male	Burnside	JAN-21-1940	Preview
332		Beaches, Sandy	OCT-18-2016	Female	Burnside	JAN-01-2000	Preview
155		Ben, Benjamin Isa	OCT-07-2016	Male	Burnside	JAN-21-1940	
151		Binka, Inka metadeug	OCT-07-2016	Male		JAN-21-1940	Preview
427		Black, Franklin	OCT-25-2016	Female		SEP-25-1950	Preview

First 1 2 3 4 5 6 7 8 9 10 ... Last   Total Records : 212

New Search

The number of the selected page appears as bold text. The **First** and **Last** links allow users to easily jump to the beginning or ending of the search results.

In addition to providing links to quickly access the **First** page, pages **1 – 10**, and the **Last** page of the search results, the total amount of pages available for selection can be easily revealed by selecting the ellipsis link (**…**).

First 1 2 3 4 5 6 7 8 9 10 ... Last

First ... 11 12 13 14 15 16 17 18 19 20 Last

If the number of records returned is greater than the system preference for the maximum records allowed, DAVE™ will display a warning message encouraging the user to refine search criteria. The message below was displayed on the search results page when a user attempted to search for all death records within a 2 year time span.

The number of records found matching the criteria entered is greater than the value specified for "Maximum records to display:". Please refine your search criteria or increase the system preference value for "Max Rows to Return".

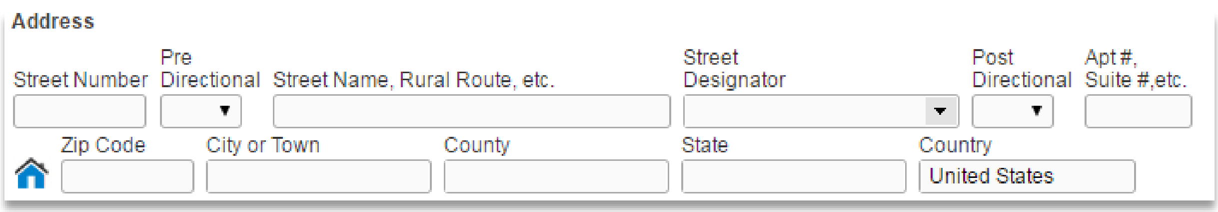
Please note: Increasing this number will negatively impact system performance. Therefore, it is recommended that the user key additional search criteria in order to limit the number of matching events instead of viewing all matching events.

Total Records : 10,677

Not all pages will require table paging. In some cases it will be more useful to show a very large result set and use scroll bars to see the records that extend below the browser window.

3.2.4 Zip Code Auto-Populate Address

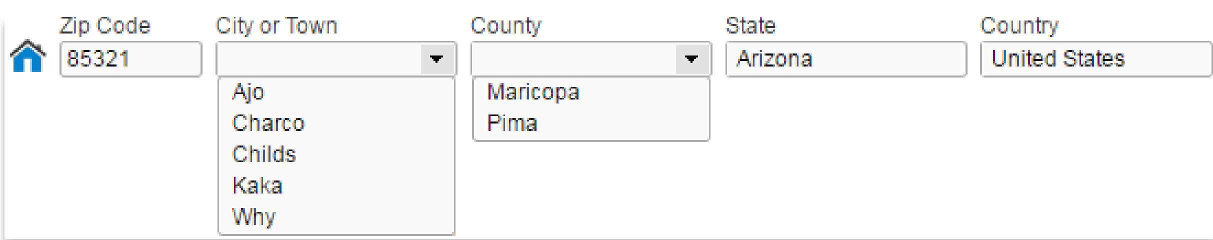
Zip code based auto-population controls are built into the DAVE™ application to assist users in entering address data accurately and efficiently.



The **Zip Code** field appears as the first entry amongst the address location fields of: *City or Town, County, State* and *Country*.

Upon entry of the *Zip Code*, the *City or Town, County, State* and *Country* fields will auto-populate.

If the *Zip Code* entered has multiple *City or Town* or *County* associated options, the system will display a list of valid values to choose from.



The *Zip Code* auto complete feature is optional and can be turned off in DAVE through System Preferences.

4. Death Registration Basics

4.1 Initiating Death Records

The creation and registration of a death record typically involves at least three participants:

Funeral Director

Certifying Medical Professional: Attending Physician or Coroner/Medical Examiner

State or County Registrar's Office

The number of particpants may change:

- When a case is referred to a Medical Examiner
- When a case is transferred from one Funeral Home to another
- When the state allows a separate individual to "pronounce death"
- When a local registrar is involved

4.2 Death Record Ownership

DAVE™ separates the ownership of the death record into two sections:

Personal Information Owner: Ultimately responsible for obtaining the personal information, filing the death certificate, and disposition of the decedent.

Medical Information Owner: The office or medical facility completing the medical information.

Below are some illustrations of how initiation and ownership of the death record may change in DAVE™:

1

A Funeral Director initiates the case and becomes owner of the Personal Information

A Medical Facility finds the case in DAVE™ and takes ownership of the Medical Information

2		A Medical Facility initiates the case and becomes owner of the Medical Information		A Funeral Director finds the case in DAVE™ and takes ownership of the Personal Information
3		The case is initiated neither by a Funeral Home nor a Medical Facility. The County or State Registrar's Office enters both Personal and Medical Information from a paper document.		
4		Occasionally, there may not be a Funeral Home involved in a case, such as in the case of an indigent death. When there is no Funeral Home involved, a Medical Facility or the Medical Examiner's office becomes the owner of both the Personal Information and Medical information and are responsible for submitting the entire record.		

The death registration functions in DAVE™ are restricted based on case ownership.

4.3 Death Registration Menu

The Death Registration Menu provides links to a series of pages that are used in the submission and registration of death records. Menus in DAVE™ are built dynamically based on user security profiles. This means that a state office worker will be presented with a different set of pages and menu options than a funeral home user. These options can also change over the processing life of the death record.

The pages that comprise the Death Registration Menu are grouped into sub-menus.

Personal Information – Pages for gathering personal information about the decedent, such as family information and relevant details of the decedent's life before death occurred, as well as disposition details and any funeral home information.

Medical Certification – Pages for entering information surrounding the death of the decedent and specific medical details.

Registrar – Pages for entering local or state registrar related information.

Other Links – Pages appearing under this sub-menu allow the user to enter additional information related to the death registration, such as comments and correspondence, ordering certified copies, etc.

All sub-menus may not be available to all users.

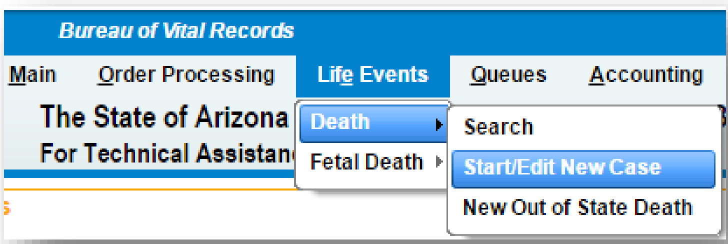
Even if a sub-menu is presented, different pages and items available to view or enter within the page may be displayed within each sub-menu, depending on individual user security.

For example, in most cases, a medical certifier will see the *Personal Information* sub-menu, yet only the *Decedent Page* will be listed under this sub-menu. As well, the medical certifier will have limited ability to enter or edit items within the *Decedent* page itself.

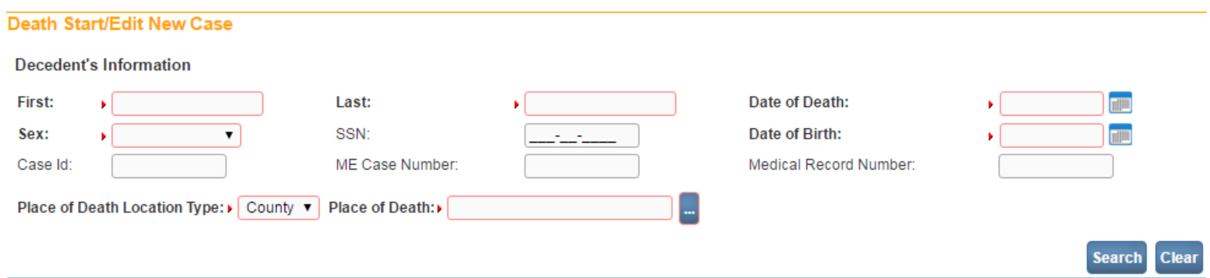
4.4 Start a New Death Case

The first step in creating a new death record is to search for any existing records on order to prevent the creation of duplicate cases.

1. From the Main Menu select *Life Events > Death > Start/Edit New Case*



2. To start a new case, all required fields, (denoted by red arrows), must be completed.

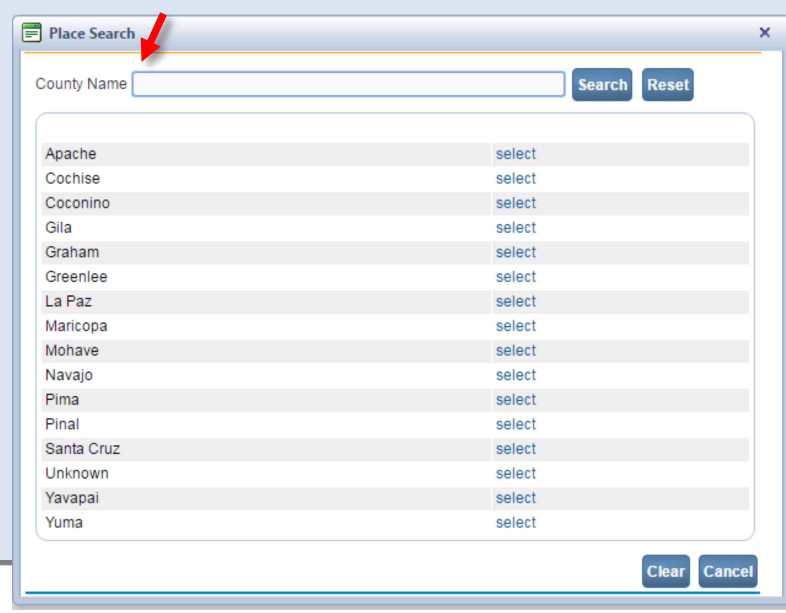


When selected the Lookup icon provides a *Place Search* popup.

The *Place Search* popup provides the user the ability search the list and select a place.

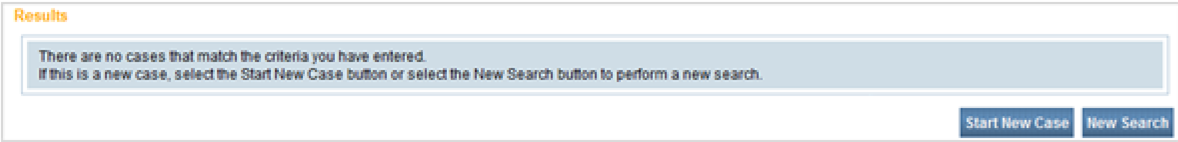
Three search options are available:

- Enter the full *County Name* and select *Search*.
- Enter a partial County name followed by the wildcard symbol and select search. Example entering gr% will return all places that start with the letters "br".
- Browse the list for the correct location and click *Select*.



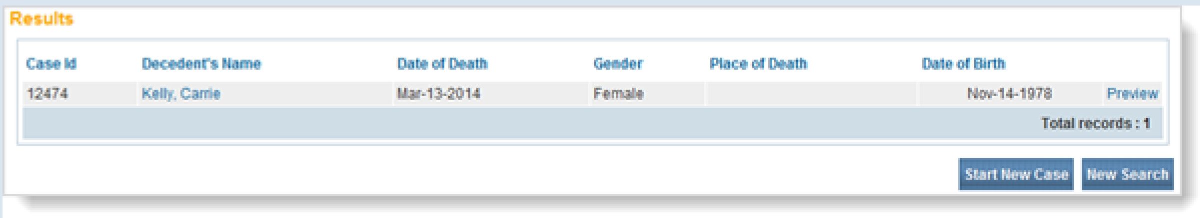
3. Once all required search criteria has been entered, select the *Search* button. DAVE™ will use the criteria entered to search for existing records.

4. If no matching records are returned, the *Results* screen will display a message indicating so.



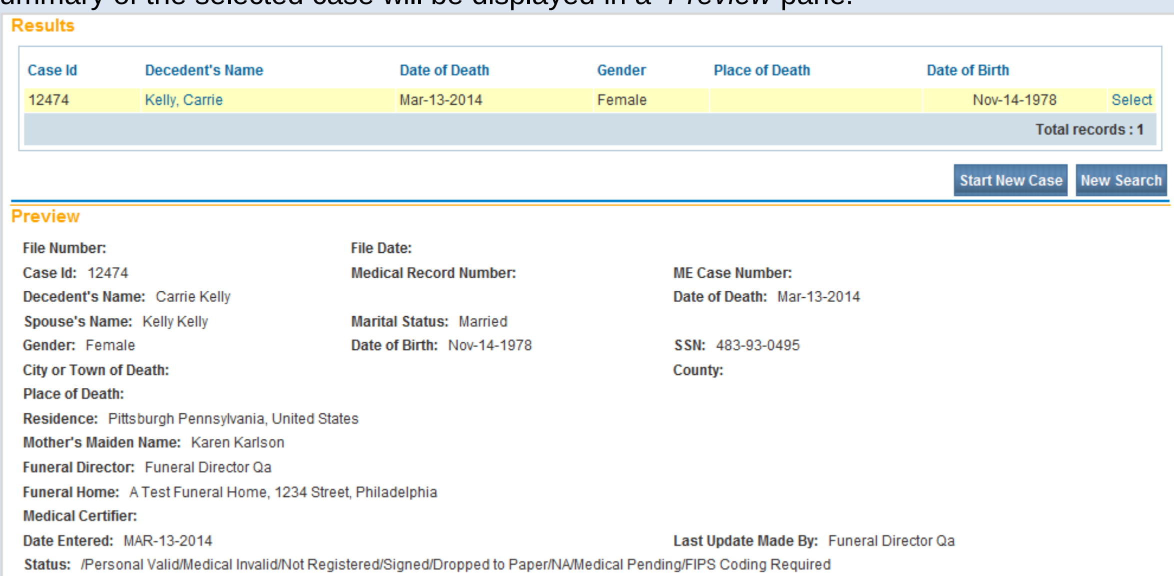
5. Select *Start New Case* to create the new record

If any **matching records are found**, they will be displayed on the *Results* screen:



Select *Preview* to view a summary of the case and make sure it is not a duplicate.

A summary of the selected case will be displayed in a *Preview* pane:



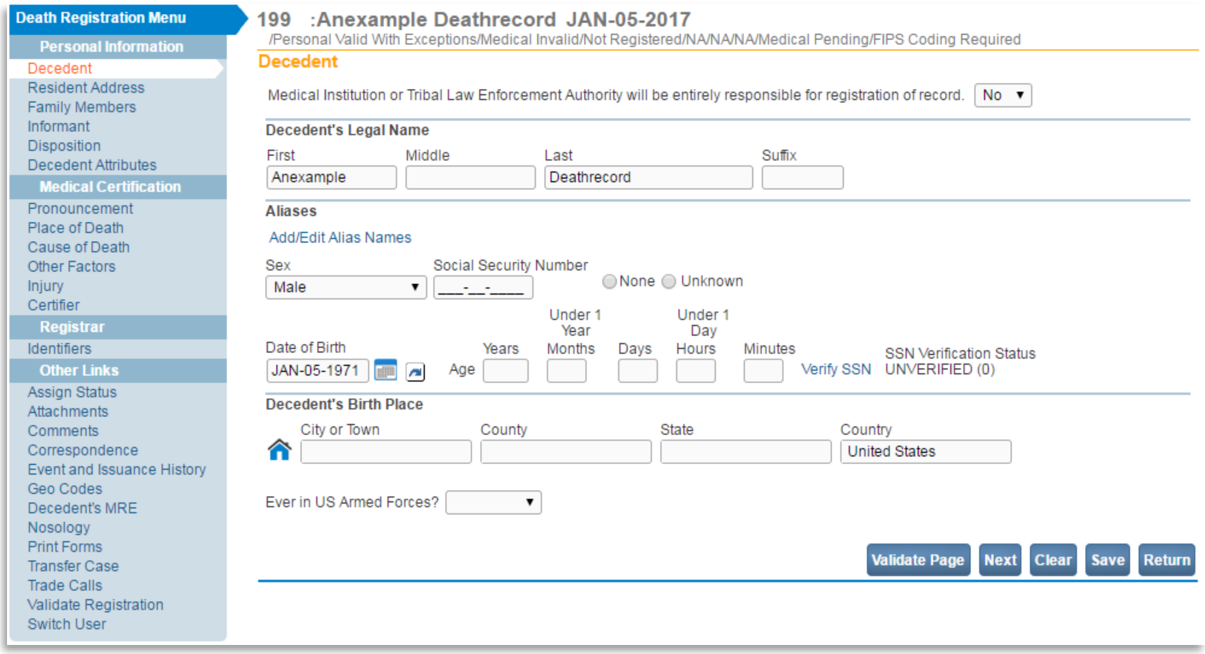
- If it is determined **the case is a duplicate,** choose the *Select* link to be taken to the existing *Death Registration* for the record to view and/or edit the case.

- If it is determined **the case is not a duplicate**, select the *Start a New Case button.*

4.5 Death Personal Information Pages

4.5.1 Decedent

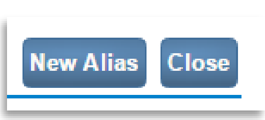
The first page of **Items to Enter** under the *Personal Information* submenu is the Decedent page.



Medical Instituition or Tribal Law Enforcement Authority will be entirely responsible for registration of record: Select '*Yes*' if the medical institution or tribal authority submitting the record will complete all portions of the registrtaion and a Funeral Home will not be involved.

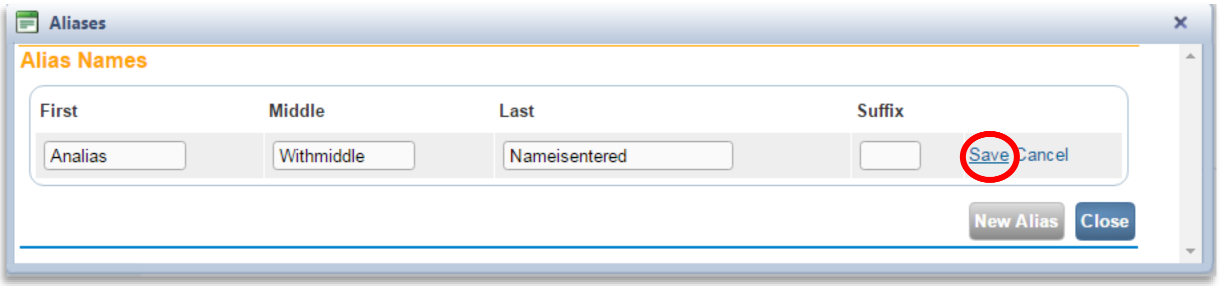
Decedent's Legal Name: Enter the *First*, *Middle*, and *Last* name of the decedent. *Suffix* is used to record generational suffixes such as Jr., III, etc.

Aliases: If the decedent was known by more than one name, select *Add/Edit Alias Names*.

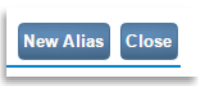


The *Aliases* popup will display. To add a new name, select the *New Alias* button.

Complete the name fields and select *Save*.

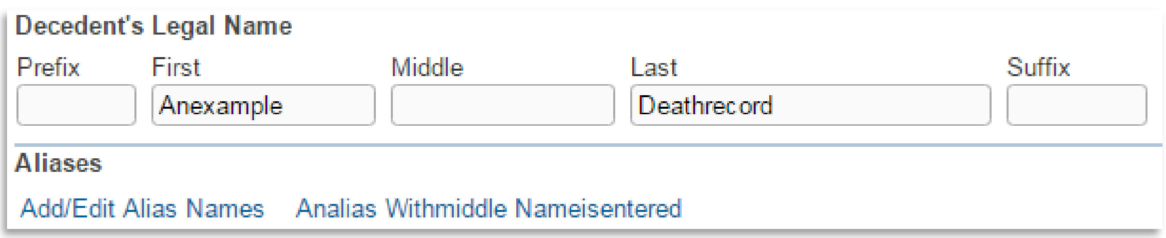


The *Save* and *Cancel* links are now replaced by *Edit* and *Delete* links; which can be uses to edit or delete the entered alias name.

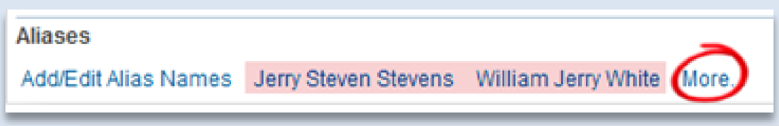


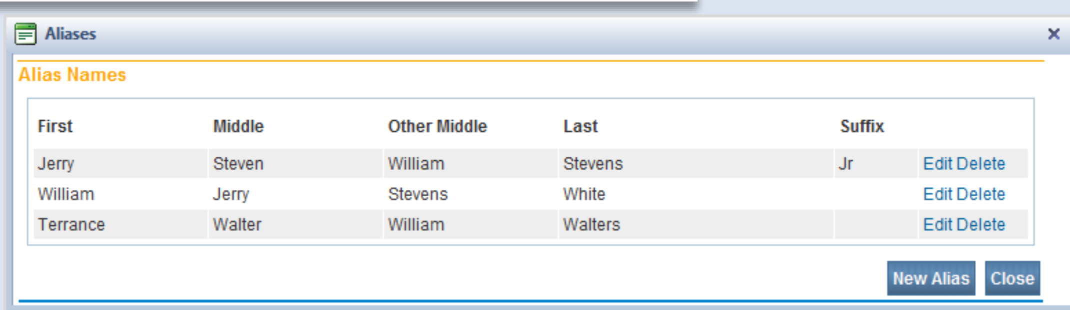
Selecting *New Alias,* at this point, allows you to enter another alias name for the decedent, if they have multple alias names.

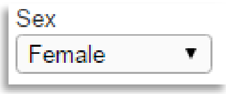
Selecting the *Close* button will return to and refresh the Decedent page displaying the newly entered alias name(s).



The Decedent page will not display more than two alias names at a time. A *More* link is displayed which, when selected, displays the full list of alias names.

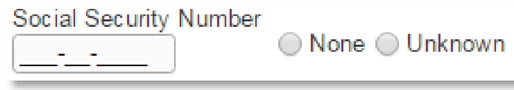






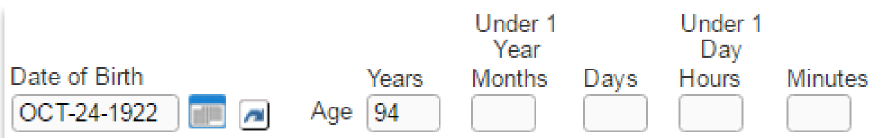
Sex: The Sex dropdown is populated with the selection made when the case was created. If the selection was made in error, choose the correct value from the dropdown.

Social Security Number: Enter the decedent's social security number in in the *Social Security Number* field. If decedent has no SSN, select *None*. If the decedent's SSN is not known, select *Unknown*.

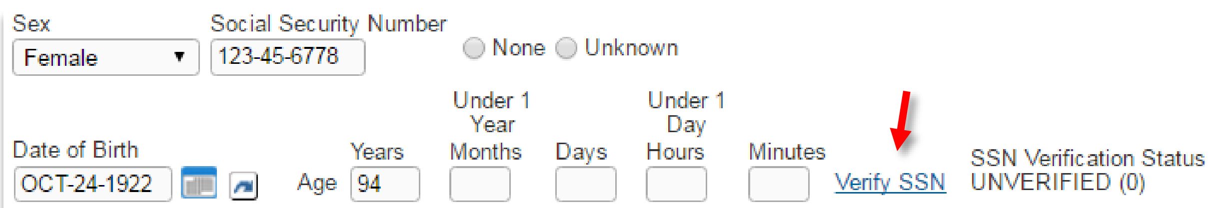


Date of Birth and Age: Enter the *Date of Birth* manually or select the Calendar icon to launch the Interactive Calendar.

Enter the decedent's age at time of death manually, or use the Auto-populate icon to calculate the age entered in the *Date of Birth* field. If the decedent was *Under 1 Year* old at the time of death leave the *Age* field empty and fill in the *Months* and *Days*. If decedent was *Under 1 Day* old at the time of death, then fill in the *Hours* and *Minutes* fields.



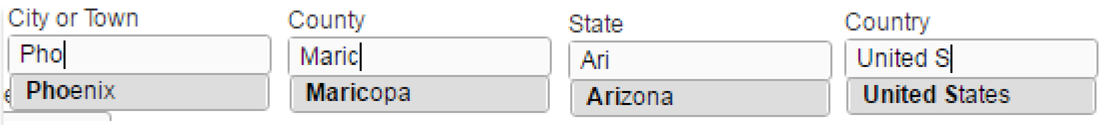
Verify SSN: Upon completion of the *Decedent Name*, *SSN* and *Date of Birth*, the *Verify SSN* link enables. When selected, the DAVE™ application establishes a connection with the Social Security Administration and verifies the SSN against information in their database.



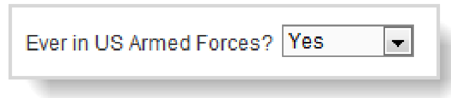
When the *Verify SSN* link is activated, the Decedent page will refresh and SSN Verification Status will change from UNVERIFIED (0) to PENDING (0) message displayed. This indicates communication has been initiated with SSA. Once the SSN verification results are known, the appropriate message will display.

Decedent's Birth Place: Enter the decedent's place of birth. If needed, the Places Lookup icon can be used to allow selection of the correct *City*, *County*, *State* and *Country* from a list.

The system also includes a predictive text feature that attempts to determine the place being entered while typing. Possible matches for *City*, *County*, *State* or *Country* will be displayed.



Armed Forces: Select the appropriate answer regarding US military service.



Once the Decedent page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

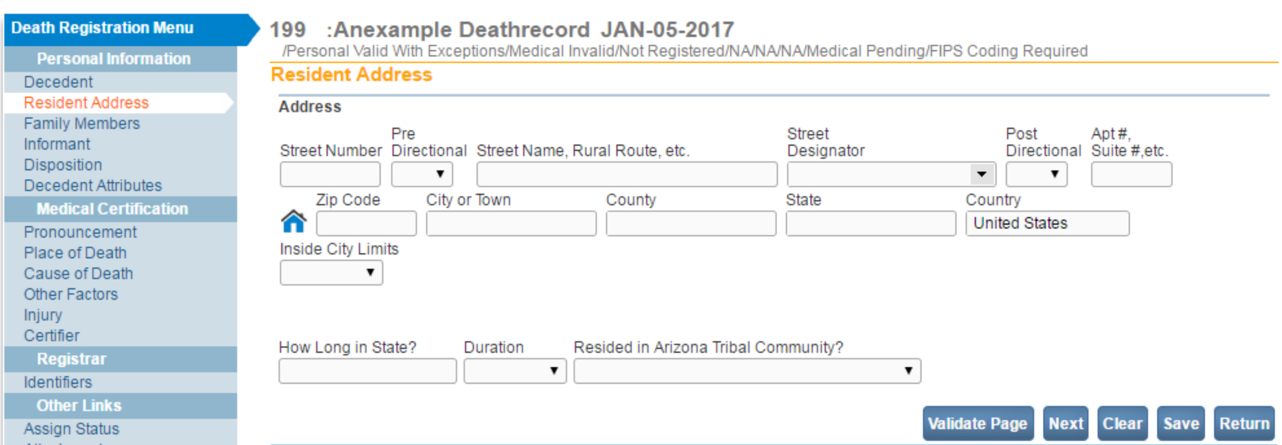
Other options include selection of the *Validate Page* button to check the page for errors, the *Clear* button to clear all entries, the *Save* button to save changes without leaving the page, or the *Return* button to return to the *Start/Edit New Case* page.

More information on record validation can be found in section *6 - Validation of Records*

4.5.2 Resident Address

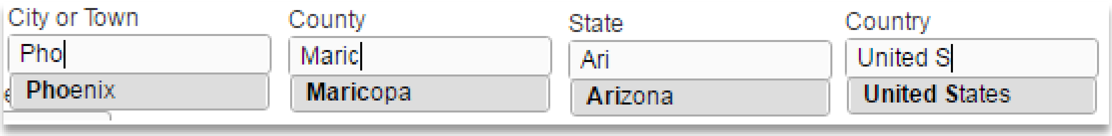
The Resident Address page **Items to Enter** record the decedent's last known address.

Street Address: The components of the Street Address are the Street Number, Pre-Directional, Street Name, Street Designator, Post-Directional and Apartment/Suite. The Street Designator and the Pre- and Post-Directionals can be selected from a drop-down list.



City, County, State, Country, Zip: If needed, the Places Lookup icon can be used to allow selection of the correct *City*, *County*, *State* and *Country* from a list.

The system also includes a predictive text feature that attempts to determine the place being entered while typing. Possible matches for City, *County*, *State* or *Country* will be displayed.



Inside City Limits: Make a selection from the *Inside City Limits?* dropdown list to indicate whether or not the Decedent's last known address was within city limits. A selection of 'Unknown' is avaliable in the list.

How Long In State: This item consists of two fields, in the first field the number corresponding to how long the decedent resided in Arizona should be entered. From the second field dropdown list a selection should be made to define the value entered in the first field as either hours, days, months, years, etc.

Resided in Arizona Tribal Community at Time of Death: Select either Yes, No, or Unknown.

If Yes, Select Tribe: If 'Yes' was selected from the Resided in Arizona Tribal Community at Time of Death, then the tribe of residence should be selected from this dropdown.

Once the Resident Address page is complete, select a navigation button at the bottom of the page:

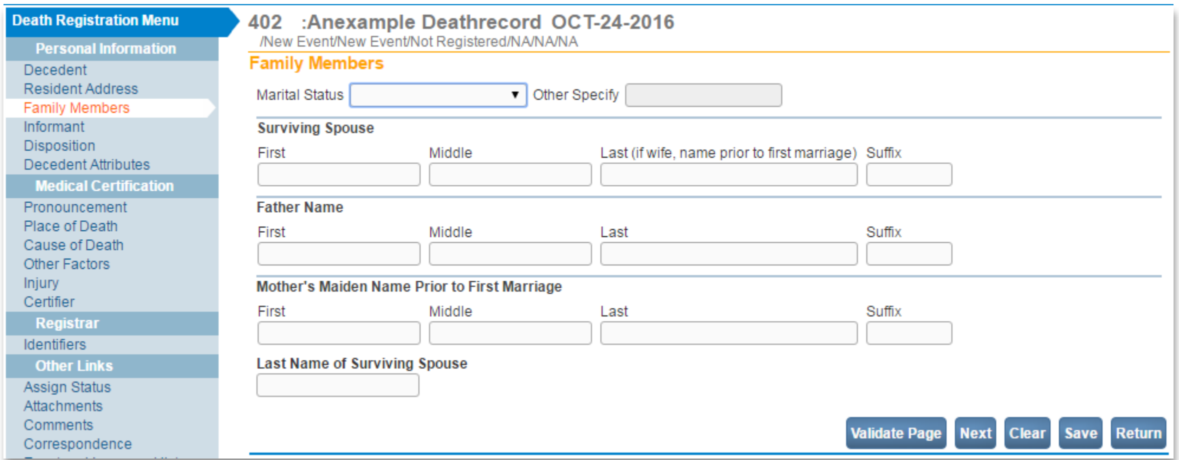
Selection of the Next button will save the data entered and proceed to the next page.

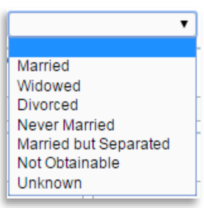
Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

4.5.3 Family Members

The Family Members page **Items to Enter** collect the first, middle and last names of the decedent's parents and spouse name information, if applicable. First and Last name fields are required. Middle can either be middle name or middle initial.





Marital Status: Make a selection from the Marital Status dropdown. If unknown, select *Unknown*.

Surviving Spouse's Name: This field is completed if the decdent has a surviving spouse. If the decedent is male, the maiden name of the surviving spouse should be entered in the Last Name field.

Father's Name: The decedent's father's name should be entered here.

Mother's Maiden Name Prior to First Marriage: The decedent's mother's maiden name, (name prior to first marriage), is collected here.

Last Name of Surving Spouse: This field is completed if the decdent has a surviving spouse. If the decedent is female, the current last name of the surviving spouse should be entered. If the decedent is male, then the spouse's last name prior to first marriage should be entered.

Once the Family Members page is complete, select a navigation button at the bottom of the page:

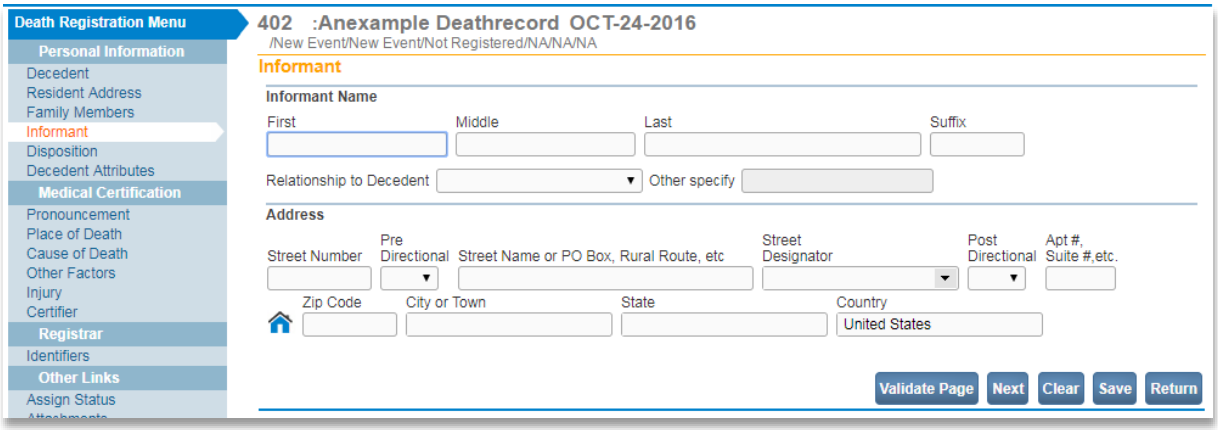
Selection of the *Next* button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

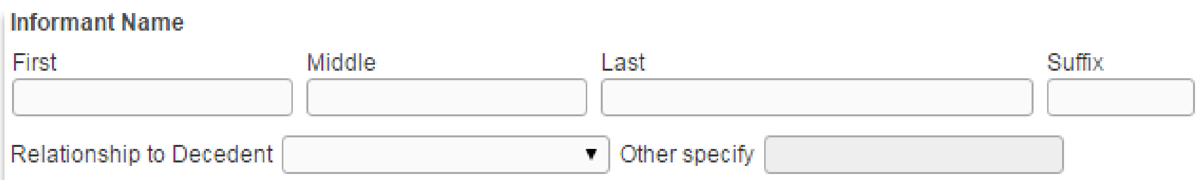
More information on record validation can be found in section *6 - Validation of Records*

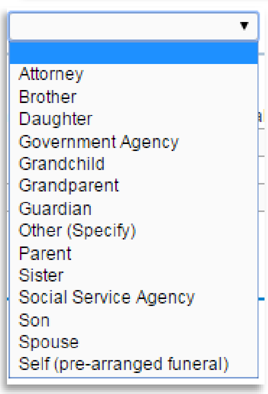
4.5.4 Informant

The Informant page **Items to Enter** are designed to gather information about the person reporting the death. This may be a spouse, family member, or someone who is not related to the decedent.



Informant Name: Enter Informant's *First*, *Middle*, *Last* name and *Suffix*. First and Last name are required fields. *Middle* can either be middle name or middle initial.

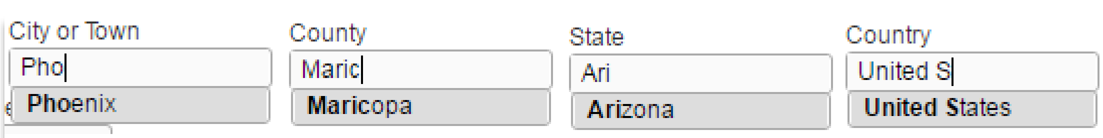




Relationship to Decedent: Select the Informant's relationship to the decedent. If not listed, choose Other (Specify) and enter the relationship in the Other specify field.

Address: Enter the *Informant's Address*. If needed, the Places Lookup icon can be used to allow selection of the correct *City*, *County*, *State* and *Country* from a list.

The system also includes a predictive text feature that attempts to determine the place being entered while typing. Possible matches for City, *County*, *State* or *Country* will be displayed.



Once the Family Members page is complete, select a navigation button at the bottom of the page:

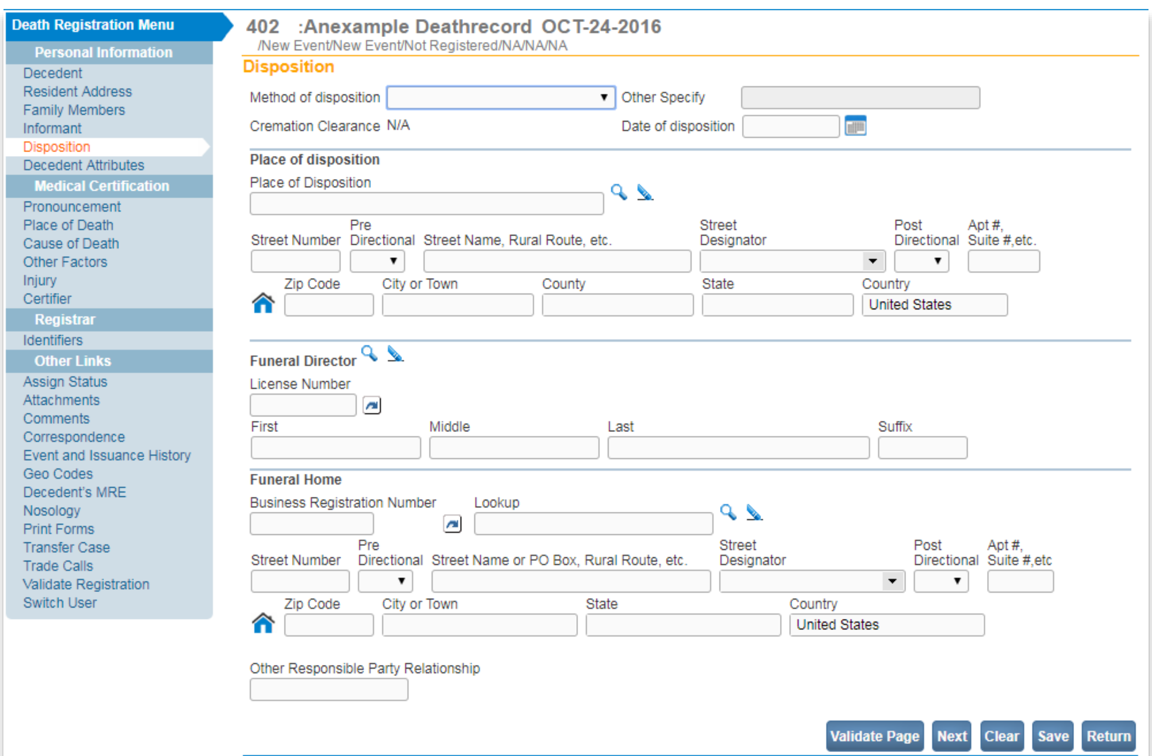
Selection of the Next button will save the data entered and proceed to the next page.

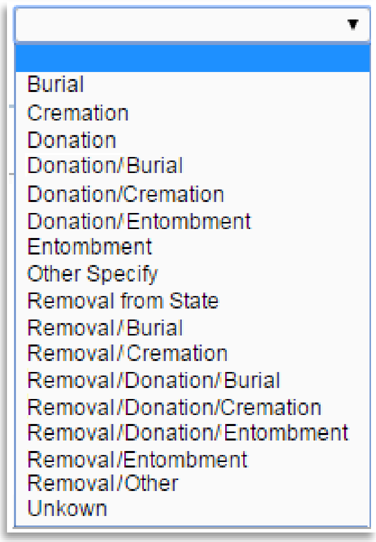
Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

4.5.5 Disposition

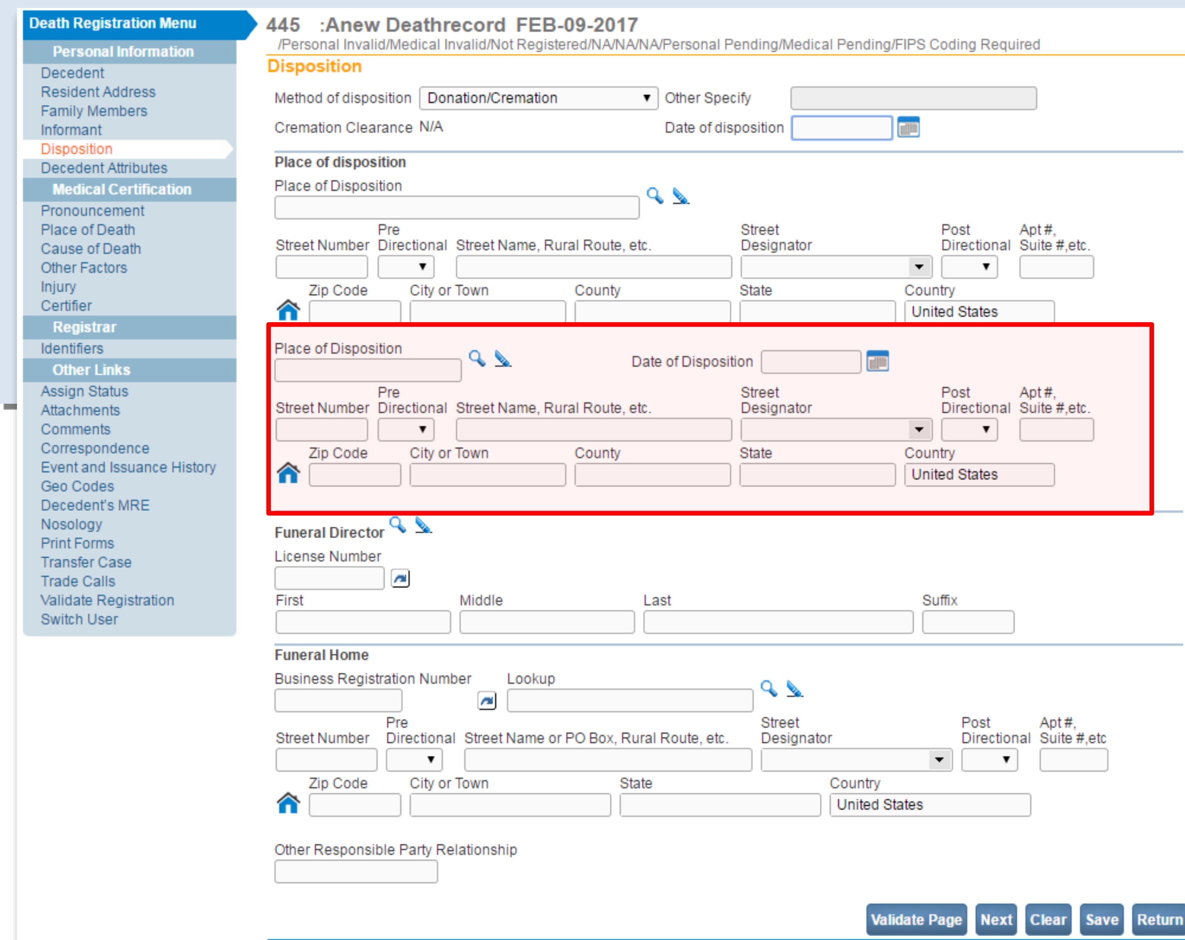
The Disposition page **Items to Enter** records the disposition details including the Method, Date, First and Secondary Place and Facility responsible.





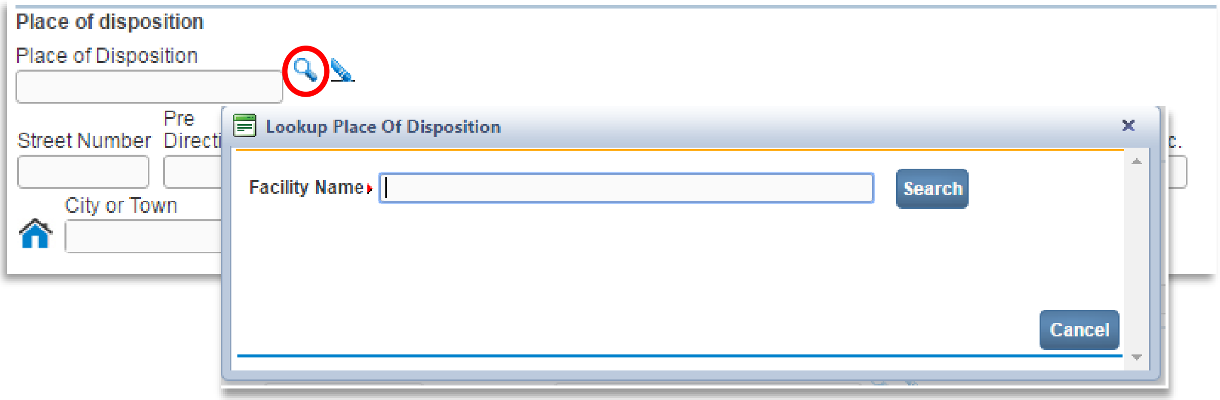
Method of Disposition: Make a selection from the *Method of Disposition* dropdown list. If the method does not appear in the list then *Other* can be selected and a method of disposition can be specified in the *Other Specify* text entry box.

If the Method of disposition indicates that there are **two places of disposition**, such as Donation/Burial, Donation/Cremation, or Donation/Entombment, then the additional fields needed to collect the *Place* and *Address* for the secondary disposition will be displayed.



Date of Disposition: Enter the *Date of Disposition* manually or select the Calendar icon to launch the Interactive Calendar.

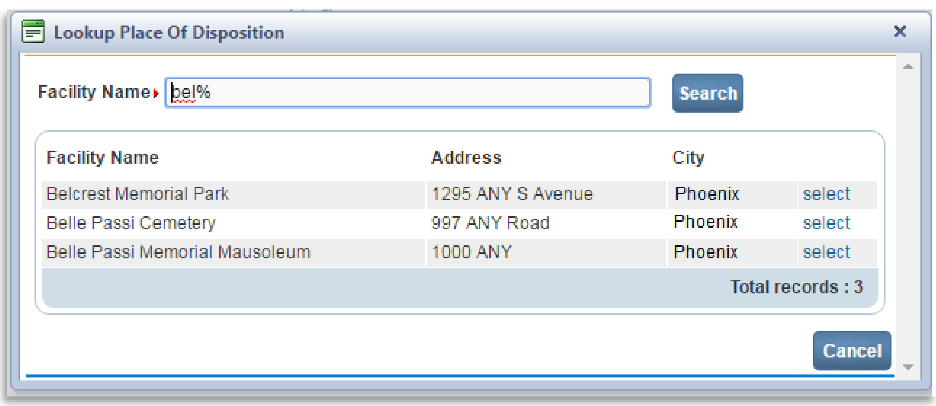
Place of Disposition: The *Place of Disposition* can be entered manually or the LOV Lookup icon can be used to launch the *Lookup Place of Disposition* search tool.



1. In the *Faclity Name* field, **enter the full name of the facility**, if known, and choose *Search*.

If the full name of the facility is not known, **enter at least two letters followed by the percent sign (%)**, then **select search** to perform a wildcard search.

2. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.



The selection system-fills all of the corresponding fields for Place of Disposition on the Disposition page.

To clear the entry made for Place of Disposition, select the eraser icon.

The *Place of Disposition Lookup* filters results based on the selection made in the *Method of Disposition* dropdown. For example, if method selected is *Burial*, the lookup will include a list of cemeteries; if *Cremation*, a list of crematories, etc.

If a funeral director is entering the record the *Funeral Director Name* and *Funeral Home* will be system filled at the start of the record. These fields will display the name of the funeral director user who started the record and the funeral home the user is logged in at. If necessary, the Funeral Director name can be changed, but only to another funeral director within the same funeral facility.

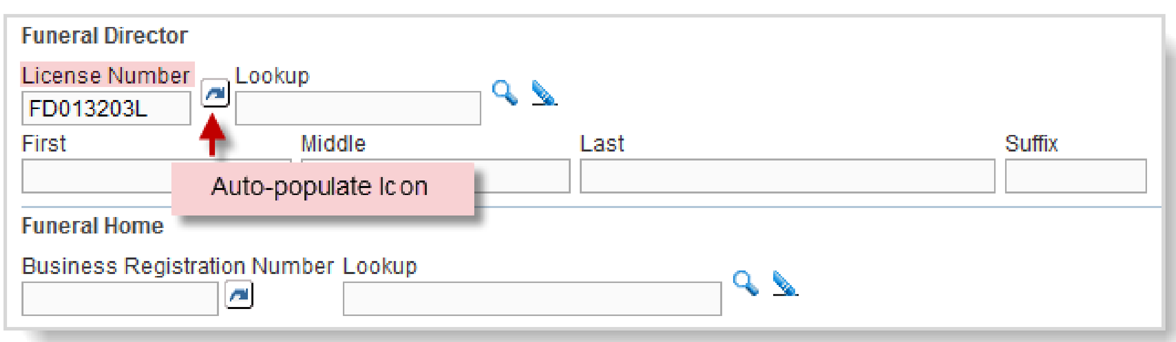
Funeral Director/Funeral Home: For state users keying death information there are three ways to complete the Funeral Director/Funeral Home information.

1. Manual entry of each item;
2. The Funeral Director *License Number* and auto-populate icon; or
3. The standard LOV Lookup controls

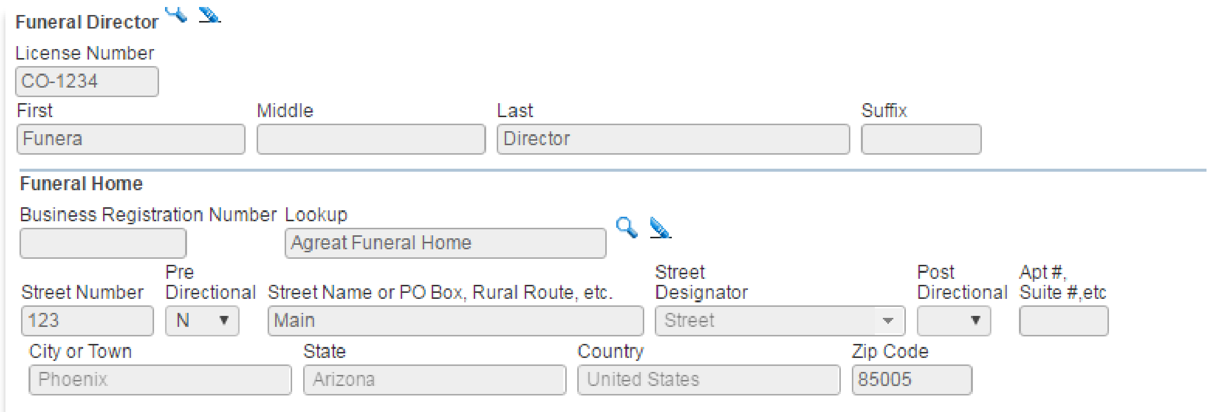
Steps for using Funeral Director License Number to complete

1. Enter a Funeral Director's License Number

2. Select the auto-populate icon



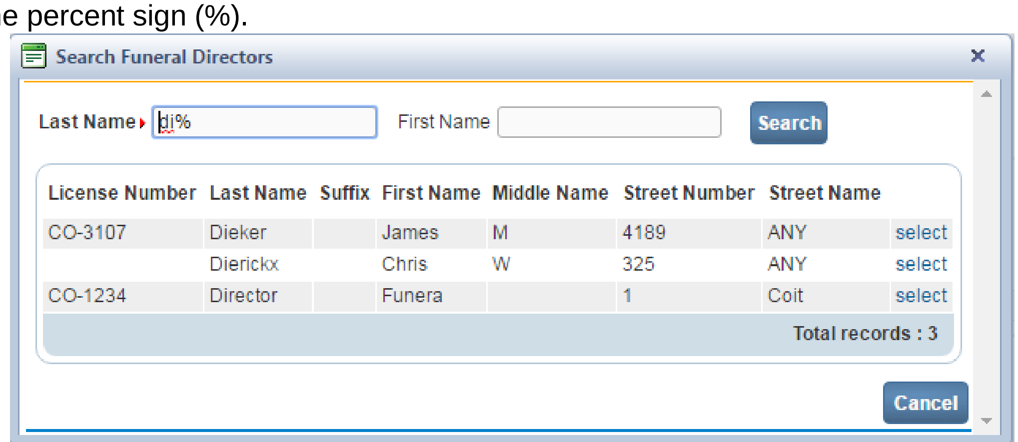
The system will then auto-populate the *Funeral Director* name and the associated *Funeral Home* information.



Steps for using the Standard LOV Lookup to complete

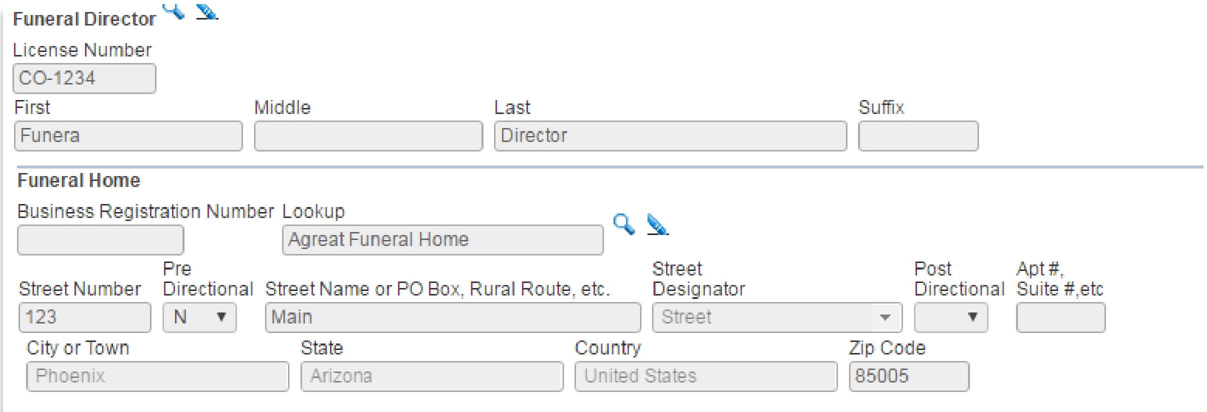
1. Select the *LOV* lookup tool to search for a funeral director.

2. Enter in the *Last* and *First Name* of the funeral director; if known. If not known a wildcard search can be performed by entering at least two characters in the *Last* name field followed by the percent sign (%).



3. From the Search Results List, select the *Select* link next to the correct Funeral Director.

The system will then auto-populate the *Funeral Director* name and the associated *Funeral Home* information.



Auto-population of the Funeral Home data will occur only if the Funeral Director selected is associated with a single funeral home. If the Funeral Director is associated with multiple funeral homes, the correct funeral home data must be manually entered or searched for and selected.

To search for a funeral home
1. Select the Funeral Home *LOV* lookup tool
2. In the Facility Name field enter the full name of the facility or use a wildcard search by entering the first two letters followed by a % and selecting search
3. Select the correct funeral facility from the search results list and the system will auto-populate it on the page.

Once the *Disposition* page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

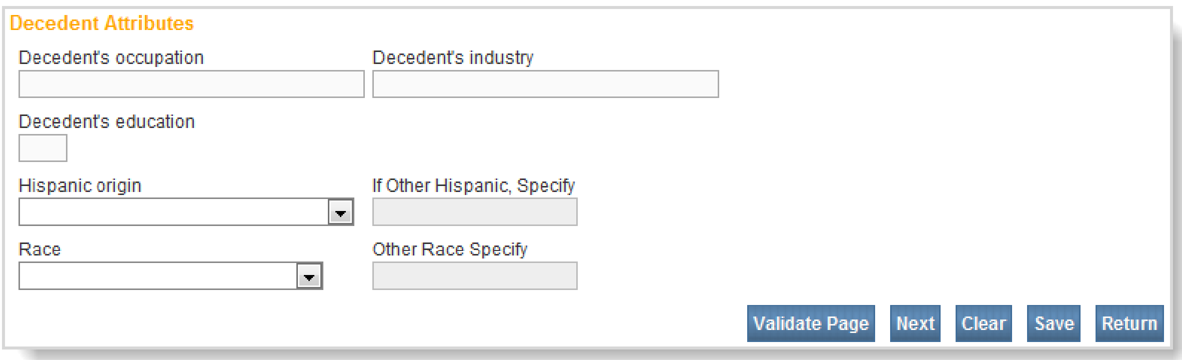
More information on record validation can be found in section *6 - Validation of Records*

4.5.6 Decedent Attributes

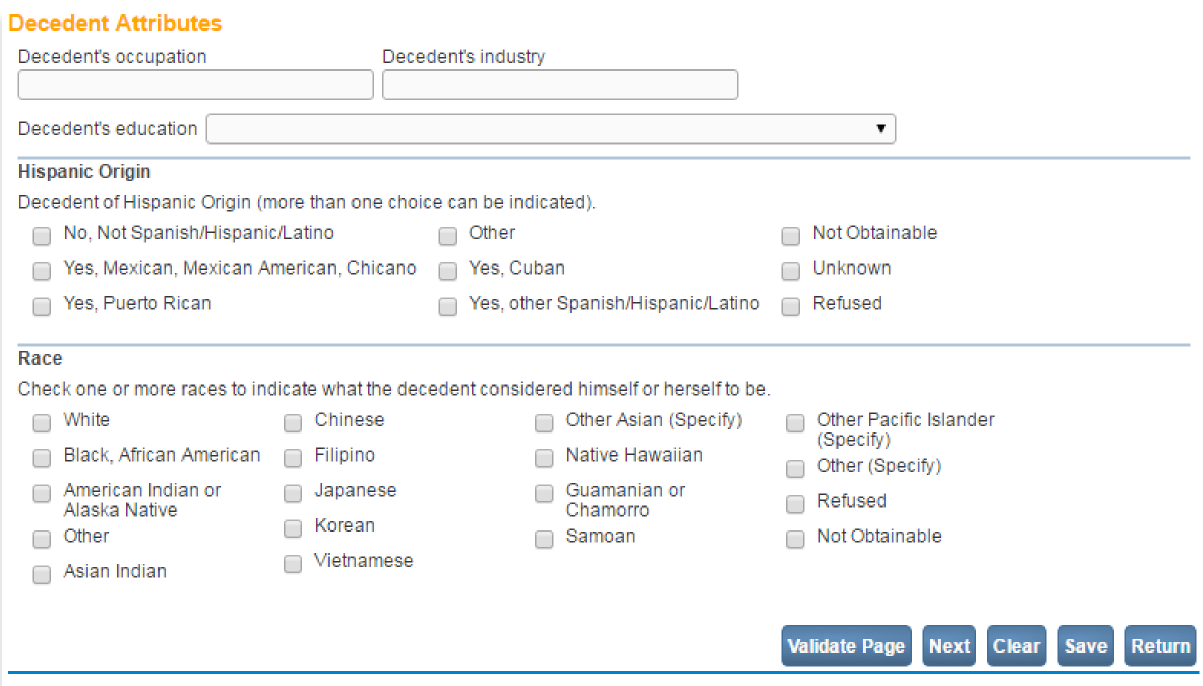
The Decedent Attributes page **Items to Enter** collect information pertaining to the decedent's occupation, education, ancestry and race. This information is vital to other state and federal agencies and can impact funding for various programs. Therefore, it is crucial the information collected be as accurate as possible.

Format Change: The 2003 US Standard Certificate Revision included format changes for the collection of race, ancestry and education data. The DAVE™ application provides the prior version of the Decedent Attributes page for those deaths occurring before January 1, 2010 when Arizona adopted the revision.

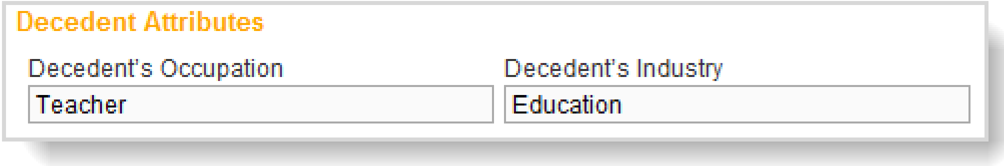
Prior Decedent Attributes page:



Current Decedent Attributes page:



Decedent's Occupation and Industry: In the first two fields, enter the *Decedent's Occupation* and *Decedent's Industry*.



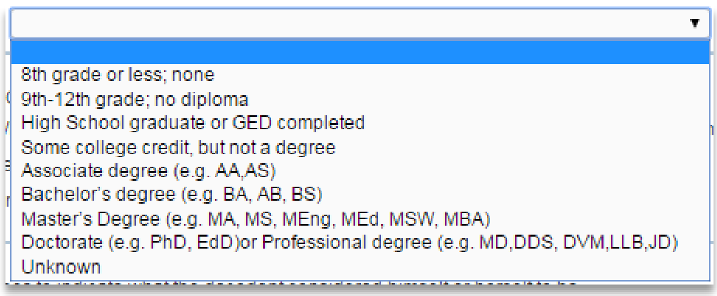
Decedent Attributes

Decedent's Occupation: Teacher

Decedent's Industry: Education

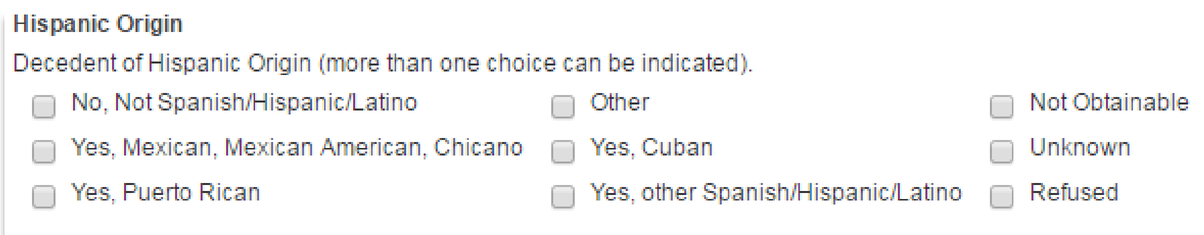
Occupational data can be important in calculating workplace mortality statistics and should be as specific as possible.

Decedent's Education: Select decedent's education level from the dropdown list. If not known, select *Unknown*.



- 8th grade or less; none
- 9th-12th grade; no diploma
- High School graduate or GED completed
- Some college credit, but not a degree
- Associate degree (e.g. AA,AS)
- Bachelor's degree (e.g. BA, AB, BS)
- Master's Degree (e.g. MA, MS, MEng, MEd, MSW, MBA)
- Doctorate (e.g. PhD, EdD)or Professional degree (e.g. MD,DDS, DVM,LLB,JD)
- Unknown

Hispanic Origin: Select a value which indicates the decedent's *Hispanic Origin.* More than one value can be selected.



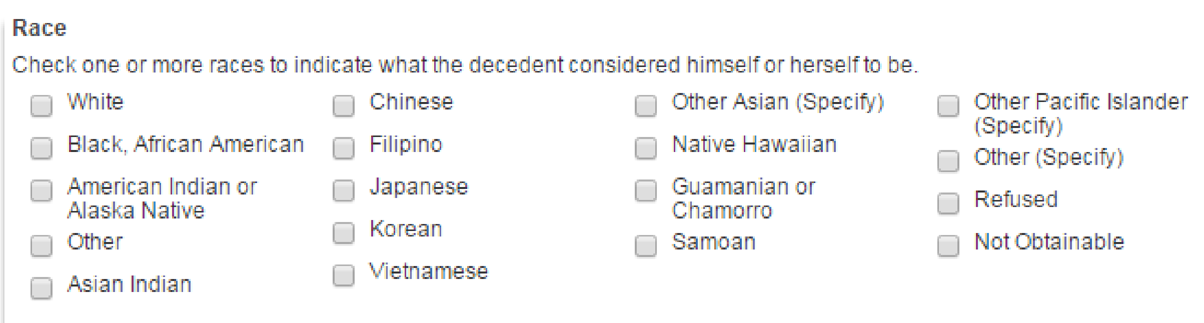
Hispanic Origin

Decedent of Hispanic Origin (more than one choice can be indicated).

- No, Not Spanish/Hispanic/Latino
- Yes, Mexican, Mexican American, Chicano
- Yes, Puerto Rican
- Other
- Yes, Cuban
- Yes, other Spanish/Hispanic/Latino
- Not Obtainable
- Unknown
- Refused

If *Other* is selected, a text field will display below *Other* in which the selection can be specified.

Decedent's Race: Select a value which indicates the decedent's *Race.* More than one value can be selected.



Race

Check one or more races to indicate what the decedent considered himself or herself to be.

- White
- Black, African American
- American Indian or Alaska Native
- Other
- Asian Indian
- Chinese
- Filipino
- Japanese
- Korean
- Vietnamese
- Other Asian (Specify)
- Native Hawaiian
- Guamanian or Chamorro
- Samoan
- Other Pacific Islander (Specify)
- Other (Specify)
- Refused
- Not Obtainable

If *American Indian or Alaska Native* is chosen, two dropdowns listing possible tribe affiliation(s) will be displayed. Select the decedent's specific tribe(s) using one or both of the dropdown boxes.

If *Other(Specify)*, *Other Asian* or *Other Pacific Islander* are selected, two text fields will be displayed in which the selection can be specified.

> If the case is not registered and the date of death is changed from a date that is after the adoption of the US standard 2003 certificate to a date prior, the values entered for those fields unique to the 2003 standard will be set to null and the 1989 US standard pages will be displayed.
>
> If the date of death is changed from a date that is prior to the adoption of the US standard 2003 certificate to a date after, the values entered for those fields unique to the 1989 standard will be set to null and the 2003 US standard pages will be displayed.

Once the *Decedent Attributes* page is complete, the *Personal Information* section of the death record is also complete. Select a navigation button at the bottom of the page:

Selection of the *Next* button will proceed to the next page and save the data entered. In this case the next page is also the first page in the *Medical Information* section, *Pronouncement*.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

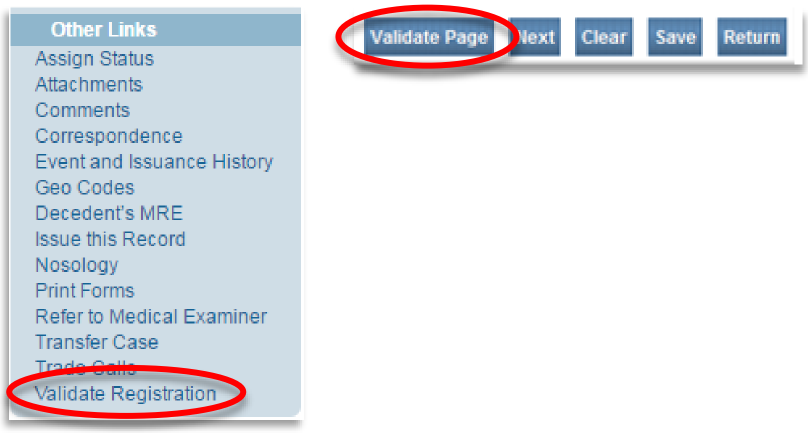
> More information on record validation can be found in section *6 - Validation of Records*

4.5.7 Sign a Death Record

At this point in the process the *Personal Information* has been completed and a Funeral Director or Medical user responsible for entering this information will need to *Affirm* and *Sign* the record.

> If the record is being entered at the State or a County Vital Records, affirmation and signature are not required and the steps for this process can be skipped.

The user affirming and signing the record should select the *Validate Page* button or *Validate Registration* link to check the record for errors and/or omissions.



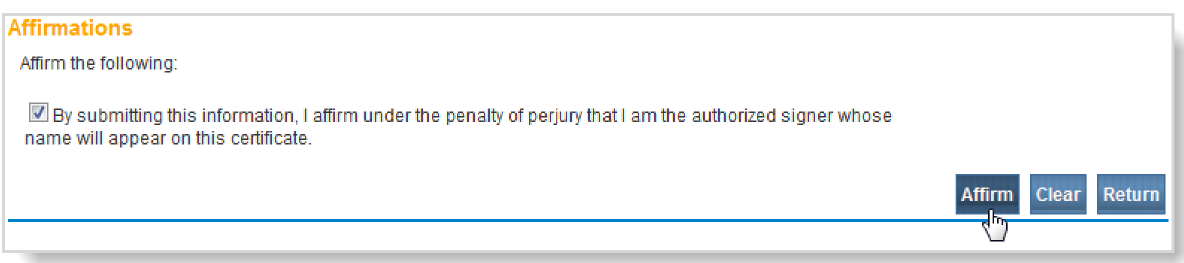
More information on record validation can be found in section *6 - Validation of Records*

Once the record has passed all validation rules, a *Sign* link will appear at the bottom of the Personal Information submenu.

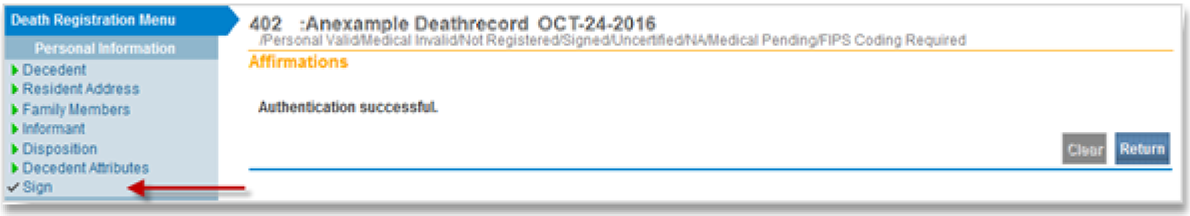
Steps to Affirm and Sign the Personal Information

1. Select the *Sign* link

2. Place a checkmark next to all affirmations and select the Affirm button.



3. An Authentication successful message will be displayed and a checkmark placed next to the *Sign* link indicating the Personal Information has been affirmed.

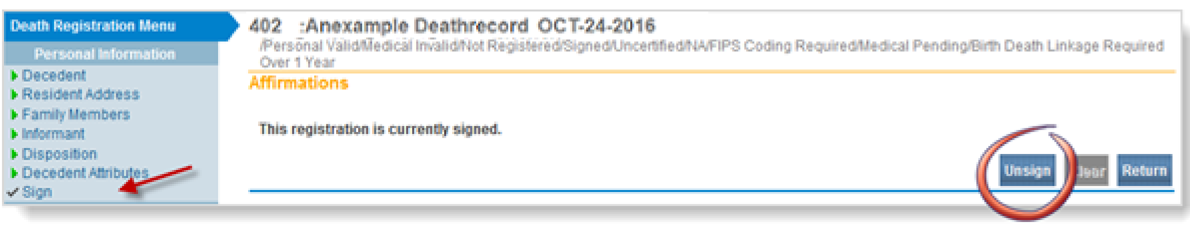


Once the record is signed, the pages within the *Personal Information* sub-menu are locked and cannot be edited.

If the record is not yet registered and updates need to be made to any of the items in the Personal Information section, the record can be unaffirmed/unsigned. Doing so unlocks the pages within the Personal Information sub-menu so they can once again be edited.

Steps to Unaffirm and Unsign the Personal Information

1. To unsign the registration, select the *Sign* link.



2. Select *Unsign*.

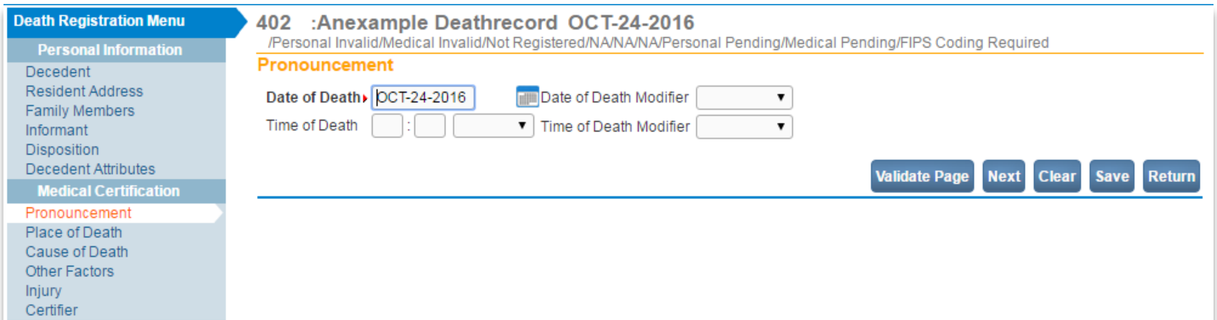
3. Select *OK* to confirm the reversal.

Once unsigned, the pages are again available for editing.

4.6 Death Medical Information Pages

4.6.1 Pronouncement

The first page of **Items to Enter** under the *Medical Information* submenu is Pronouncement, which captures the date and time of death.



Date of Death: The *Date of Death* field is auto-populated based on the date entered on the *Start/Edit New Case* page when the record is created.

If the original date entered is incorrect it can be updated by either entering the *Date of Death* manually or select the Calendar icon to launch the Interactive Calendar. This is a required field as indicated by the red arrow and must be completed for all death registrations. If the date of death is unknown enter: 99-99-9999.

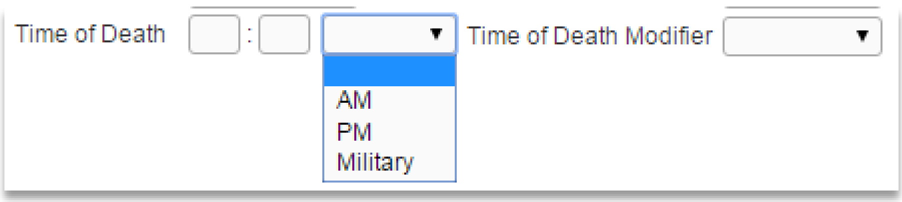
The *Date of Death* is a required field as indicated by the red arrow and must be completed for all death registrations.

Date of Death cannot be unknown.

Date of Death Modifier: The *Date of Death Modifier* adds descriptive information relating to the *Date of Death*. There are two options to select from:

Modifier	Description
Actual Date of Death	The date entered is the actual date of death
Found Date of Death	It is known when the deceased's body was found, but a date of death cannot be determined

Time of Death: Enter the hour and minute of death and make a selection from the *AM/PM/Military* dropdown.



For unknown *Time of Death* enter 99:99 the *Time of Death Modifier* will automatically fill in with 'Unknown.'

Time of Death Modifier: The *Time of Death Modifier* adds descriptive information relating to the *Time of Death*. There are three options to select from:

Modifier	Description
Actual Time of Death	The time entered is the actual time of death
Unknown Time of Death	Time of death is unknown
Found Time of Death	It is known when the deceased's body was found, but a time of death cannot be determined

If the *Date of Death* year was keyed incorrectly and the record has been registered, the date cannot be corrected or amended. The user must void the existing record and re-enter a new case with the correct year of death.

It is not necessary to void a registered case to correct or amend only the month and day of death.

Once the *Pronouncement* page is complete, select a navigation button at the bottom of the page:

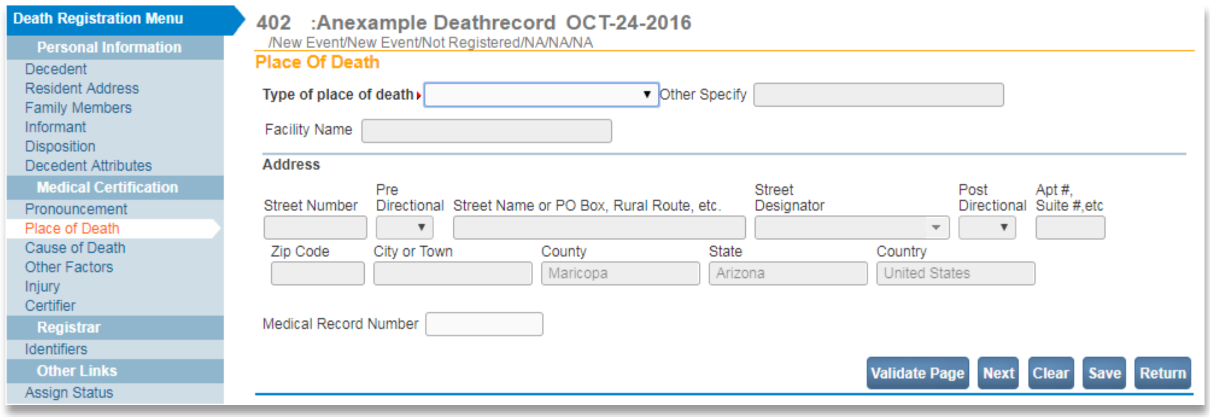
Selection of the Next button will save the data entered and proceed to the next page.

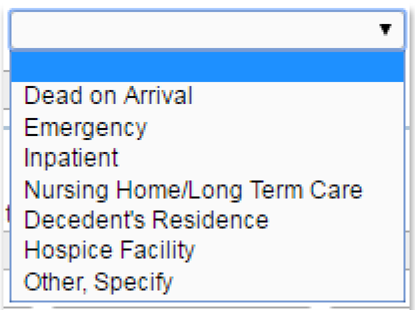
Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

4.6.2 Place of Death

The Place of Death **Items to Enter** capture data regarding where the death occurred. This could be a hospital, home address or some other location.





Type of Place of Death: From the *Type of Place of Death* dropdown, select the type that best matches the location where death occurred.

If *Other (specify)* is chosen, enter the information on type of place of death into the *Other Specify* text box.

Facility Name:

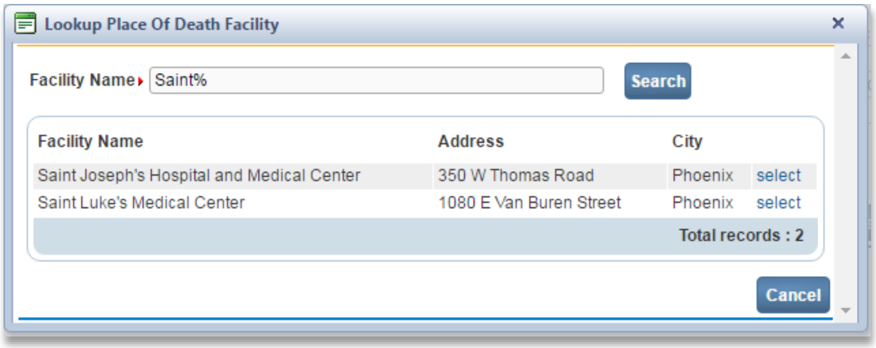
If *Decedent's Residence* is selected from the *Type of place of death* dropdown, the *Address* fields for *Place of Death* will be auto-populated with the information entered on the *Resident Address* page. If no information has been entered on the *Resident Address* page, the residence address can be manually entered. The *Facility Name* field is not required and will be disabled.

If *Other (specify)* is selected from the *Type of place of death* dropdown, the facility name. (if known or applicable), and address fields should be manually entered. The facility name field can be left blank.

For all other *Type of Place of Death* dropdown selections,the *Place of Death* can be entered manually or the LOV Lookup icon can be used to launch the *Lookup Place of Death* search tool.

Steps to Use the Place of Death Lookup

1. In the *Faclity Name* field, if known, enter the full name of the facility and choose *Search*.

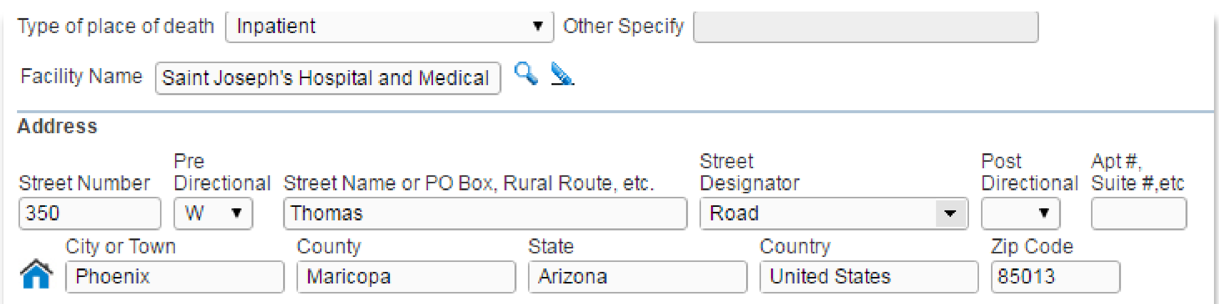


If the full name of the facility is not known, **enter at least two letters followed by the %**, then **select search** to perform a wildcard search.

2. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

> Facilities not listed in the LOV lookup tool can be entered by typing the *Facility Name* and address information manually. All out-of-state records will contain non-listed facilities.

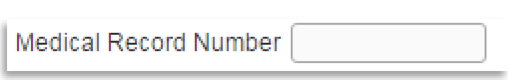
The selection system-fills all of the corresponding fields for Place of Death on the Place of Death page.



To erase the entry made for Place of Death choose the eraser icon.

> The *Place of Death Lookup* filters results based on the selection made in the *Type of Place of Death* dropdown. For example, if method selected is *Inpatient, Emergency* or *Dead on Arrival*, the lookup will filter the search to include hospitals; if *Hospice*, a list of hospices, etc.

> If the *Type of Place of Death* selected matches the facility type assigned to the user completing the *Medical Certification* pages, then the *Place of Death* will be system-filled with the facility name and address the user is logged in under.



Medical Record Number: If known, the decedent's Medical Record Number can be entered.

> The Medical Record Number can be referenced later to Search for or Locate the case.

Once the *Place of Death* page is complete, select a navigation button at the bottom of the page:

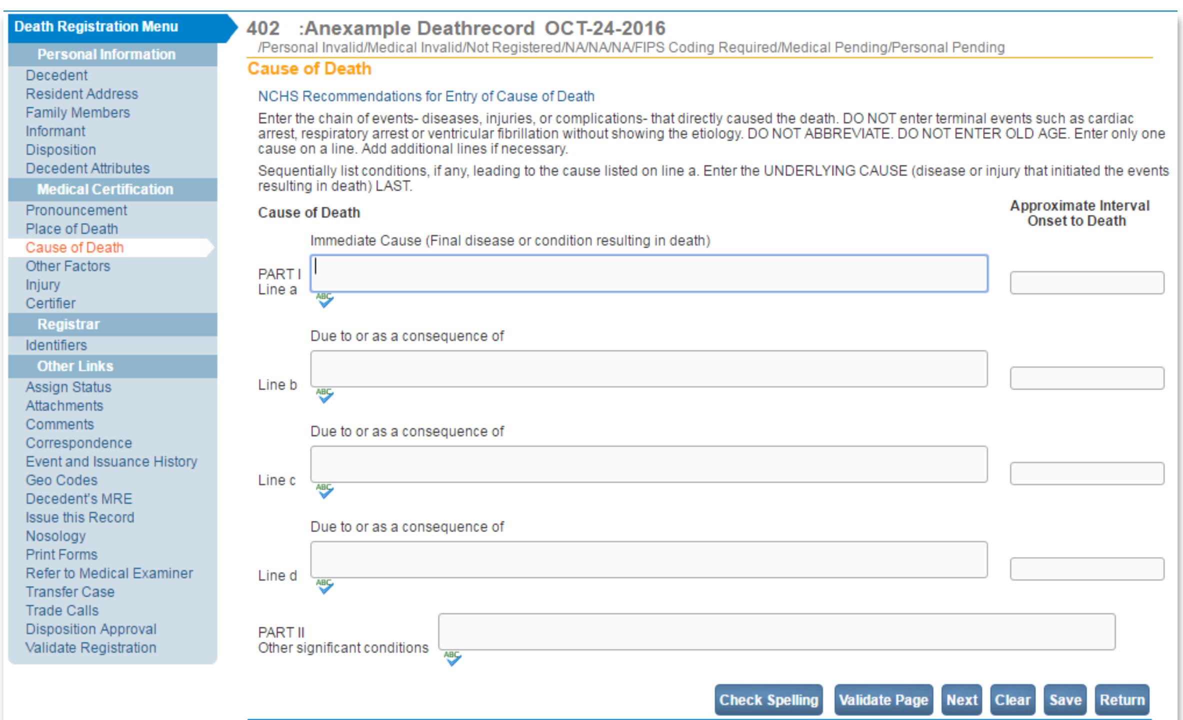
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

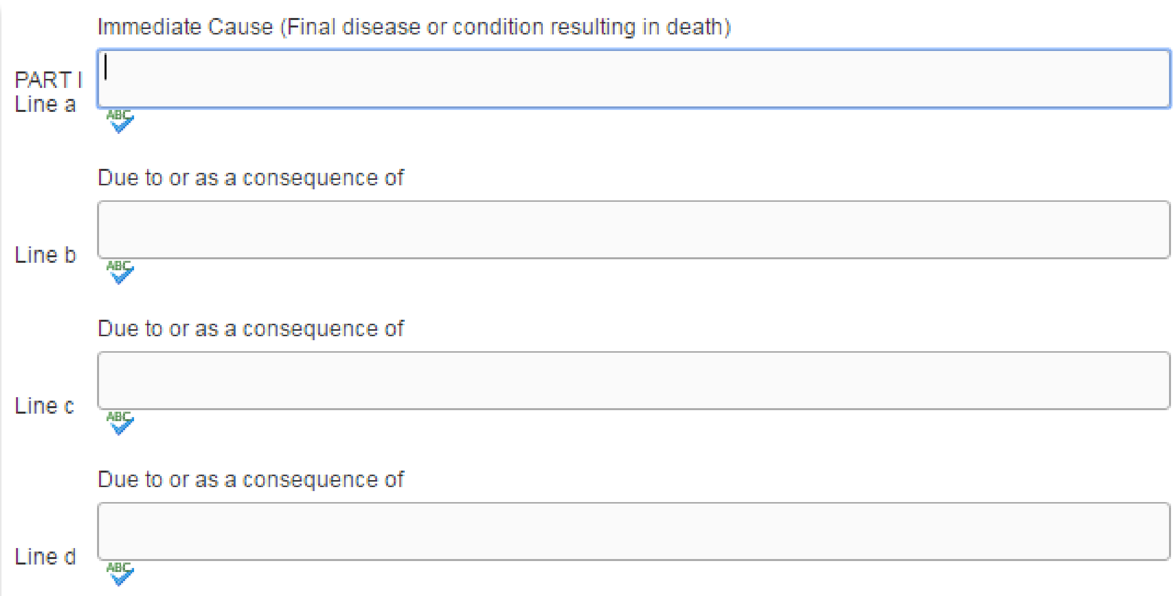
4.6.3 Cause of Death

The *Cause of Death* page **Items to Enter** capture the data regarding the primary and underlying conditions which lead to the decedent's death.



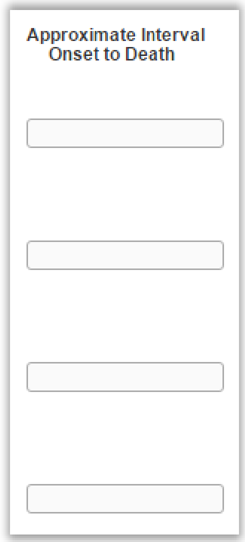
Attention to detail and specificity is essential when completing this page.

The *Cause of Death* page consists of two parts:

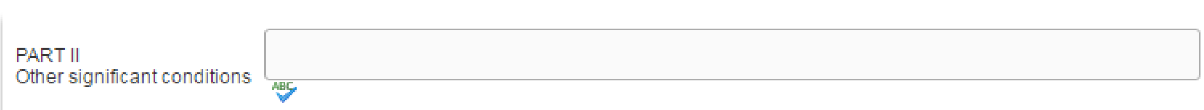


Part 1 is for reporting the chain of events leading directly to death. The *Immediate Cause*, (the final disease, injury, or complication directly causing death), is listed on *line a*. The underlying cause(s), (chain of events that led to the immediate cause), is listed in *lines b* through *d*.

Approximate Interval Onset to Death: To the right of each of the lines *Part 1* there is a corresponding *Approximate Interval Onset to Death* field. For each cause listed in *Lines a-d* an *Approximate Interval Onset to Death* must also be completed. While every line on the *Cause of Death* form will not necessarily be used for all deaths, lines that are used must be filled in sequentially.

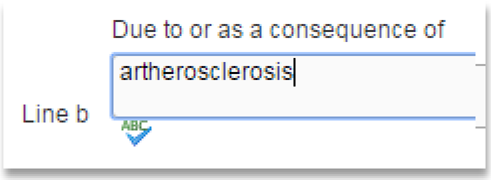


Part 2 is for reporting all other significant diseases, conditions, or injuries that contributed to death.

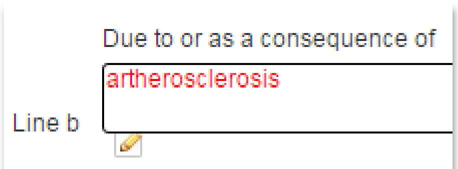


Spell check: *Spell check* functionality is available for *Cause of Death lines a-d* and the *Other significant conditions* field.

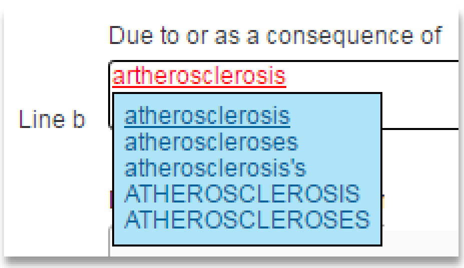
1. After making an entry, select the *Spell Check* icon located below the line.



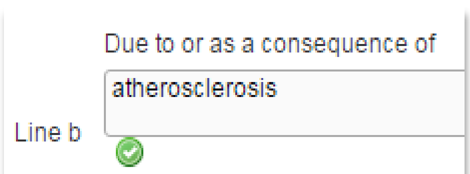
2. DAVE™ will check all phrases entered and highlight any misspelled entries.



3. Select the highlighted word. A list of possible corrections is displayed. Select an option from the list to replace the misspelled word.

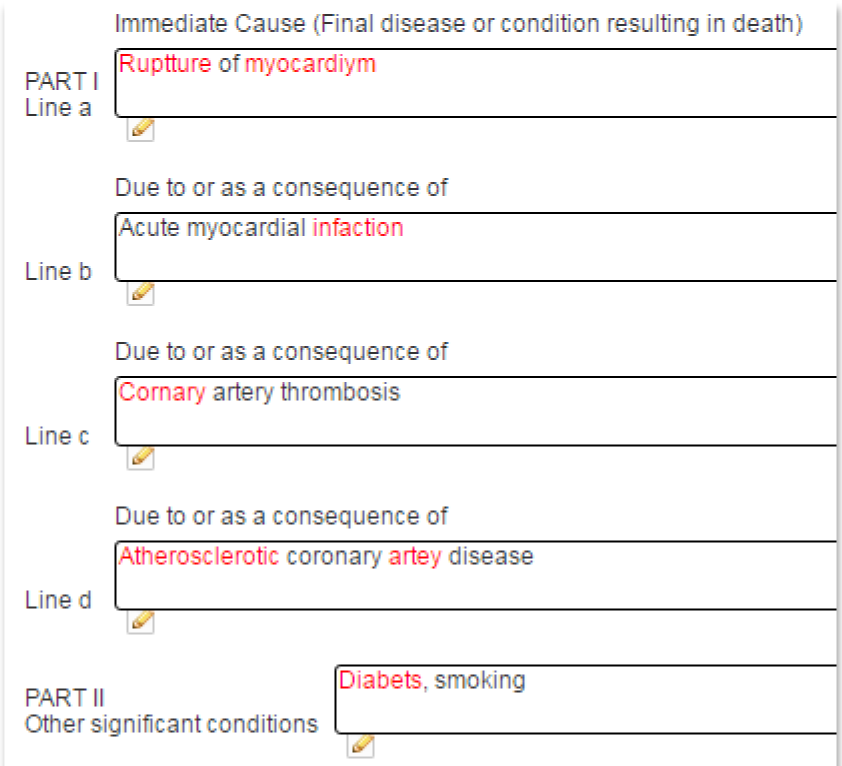


4. Upon correction of all misspelled entries in a line, the Spell Check icon will be replaced with a Corrected icon.



5. Alternately, all lines can be spelled checked simultaneously by selecting the *Check Spelling* button located at the bottom of the Cause of Death page.

DAVE™ will check all phrases entered on all lines and highlight any misspelled entries. You can then select the phrases and use the same control as in step 3 above to view and select suggested properly spelled words.



Once the *Cause of Death* page is complete, select a navigation button at the bottom of the page:

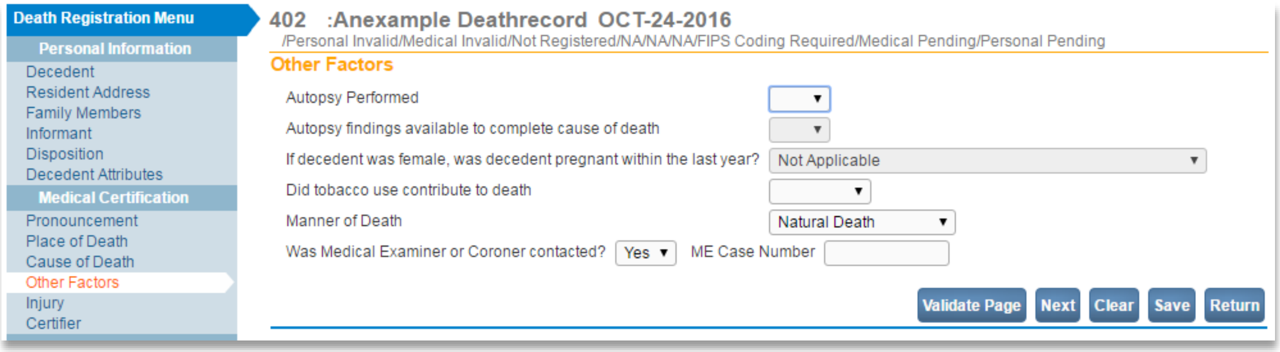
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous page.

More information on record validation can be found in section *6 - Validation of Records*

4.6.4 Other Factors

The *Other Factors* page **Items to Enter** capture additional information relevant to death.

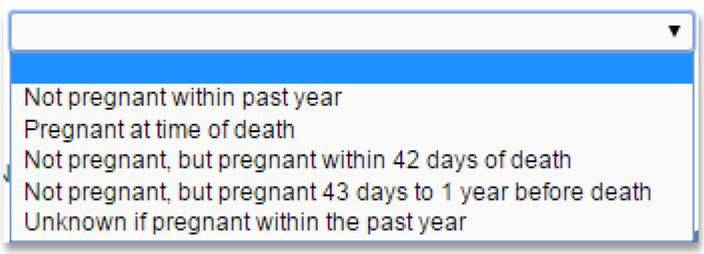


Autopsy Performed: Select either *Yes* or *No* from the *Autopsy Performed* dropdown list to indicate whether or not an autopsy was performed.

Autopsy findings available to complete cause of death: Select either *Yes* or *No* from the *Autopsy finding available to complete the cause of death* dropdown list to indicate whether or not the autopsy findings were used to complete the cause of death.

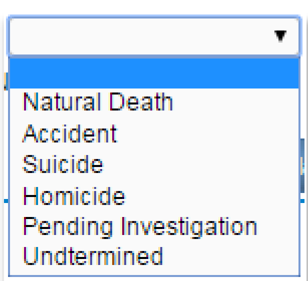
> If the selection for *Autopsy Performed* is No, then the *Autopsy Findings* field is not required and will be disabled.

If decedent was female, was decedent pregnant within the last year? Make a selection from the dropdown to indicate whether or not the decedent was pregnant at time of death.



> The *Was decedent pregnant* question is not required and will be disabled if the decedent is male or if the decedent is a female less than 10 or greater than 64 years old.

Did tobacco use contribute to death? Make a selection of *Yes*, *No*, *Probably*, or *Unknown* from the dropdown to indicate if smoking contributed to death.



Manner of Death: Make a selection from the dropdown list to indicate the manner in which death occurred. *Natural* should be selected unless the cause of death entered indicated some form of trauma or injury.

The options available in the *Manner of Death* dropdown are displayed based on user security privileges. For example a Medical Certifier may only be granted the ability to select *Natural* or *Accident* from the list; whereas a Medical Examiner would see the full list of options.

Was Medical Examiner contacted? Select either *Yes* or *No* from the *Was Medical Examiner Contacted* dropdown list to provide information on whether or not a medical examiner was contacted.

ME Case Number: If *Yes* is selected for the *Was Medical Examiner contacted question*, the ME Case Number field will become enabled. If known the *ME Case Number* should be entered into this field.

Once the *Other Factors* page is complete, select a navigation button at the bottom of the page:

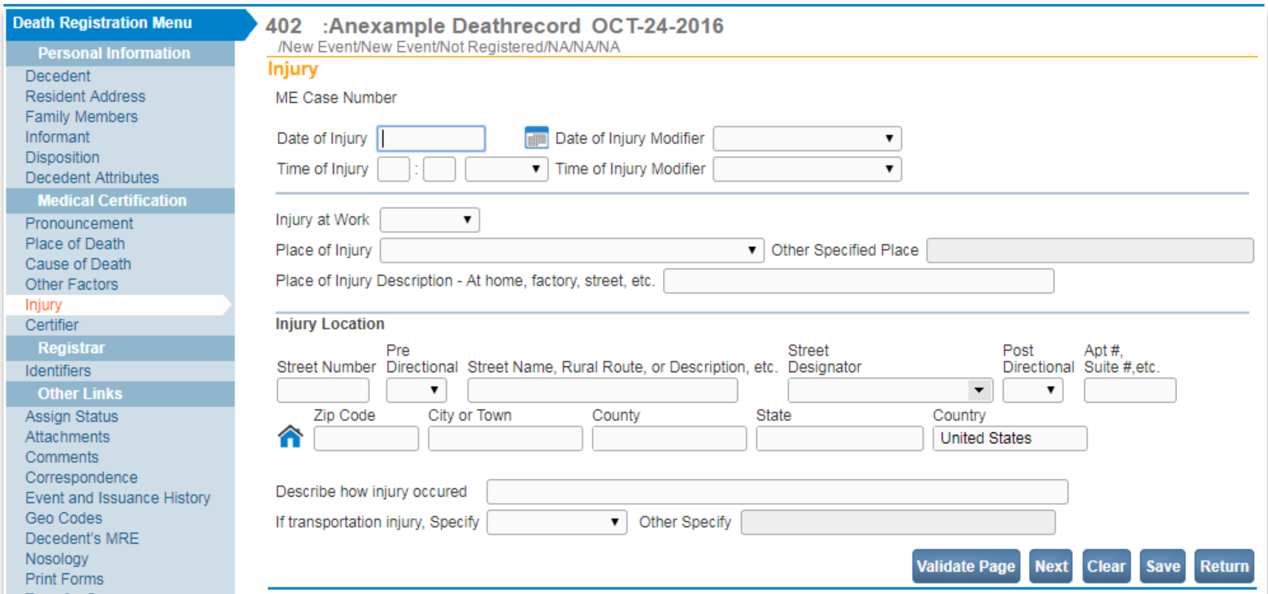
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

4.6.5 Injury

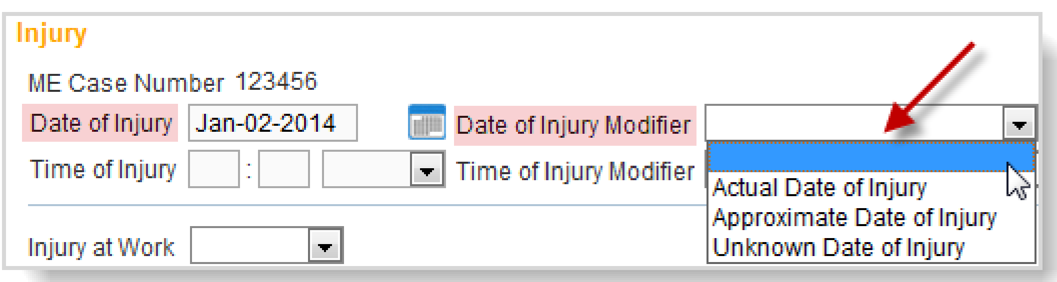
The *Injury* page **Items to Enter** capture information for cases where the manner of death is not natural. These items help clarify the date, time, activity and location where the injury events that lead to death.



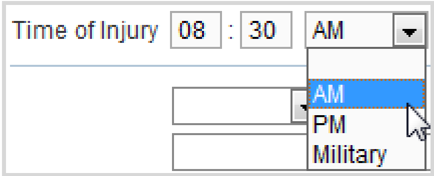
ME Case Number: If an *ME Case Number* was entered on the Other Factors page, it will display here. If no ME Case Number has been entered, this area will remain blank.

Date of Injury: This is the date injury occurred that led to the decedent's death, but not necessarily the actual date of death (i.e., decedent was in an accident and lived several days after). Enter the *Date of Injury* manually or select the calendar icon to launch the interactive calendar.

Date of Injury Modifier: After entering the *Date of Injury*, choose a *Date of Injury Modifier.* The *Date of Injury Modifier* adds descriptive information relating to the *Date of Injury*.

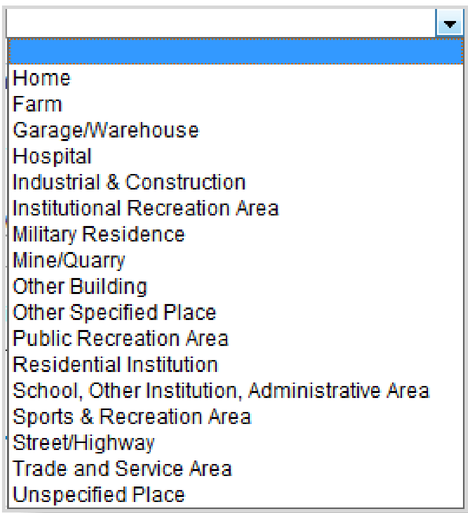


Time of Injury: Enter the hour and minute of death and make a selection from the *AM/PM/Military* dropdown.



For unknown *Time of Injury* enter 99:99 the *Time of Injury Modifier* will automatically fill in with 'Unknown.'

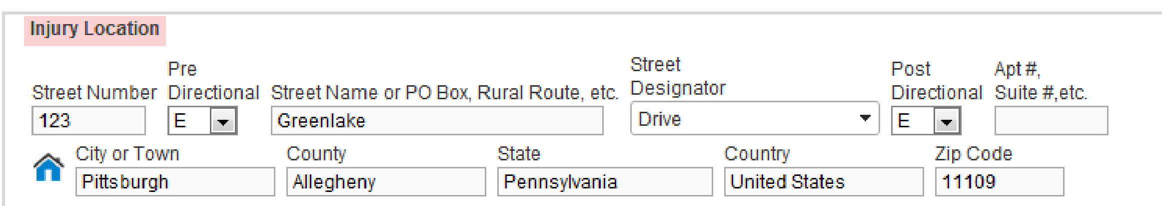
Injury at Work: If injury occurred on the job, select *Yes* from the *Injury at Work* dropdown. Otherwise, select *No* or *Unknown*.



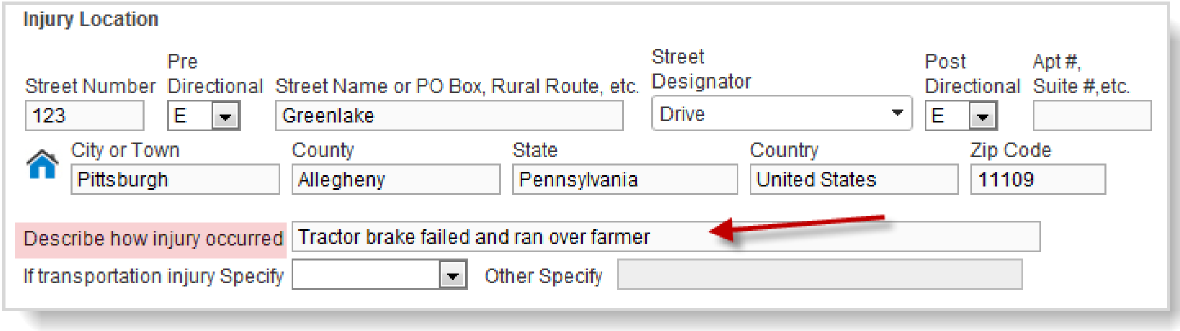
Place of Injury: Select the option that best describes the place where the injury occurred.

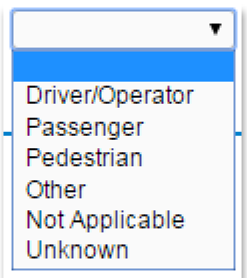
If *Other Specify* is selected, an entry must be keyed in the corresponding *Other (Specify)* text entry control.

Injury Location: Provide the address where the injury occurred.



Describe how injury occurred: Enter a description of the circumstances surrounding the injury here.





If Transportation injury Specify: If the injury resulted from a transportation mishap, make a selection from the *If Transportation injury Specify* dropdown.

If *Other Specify* is selected, fill out the corresponding *Other Specify* field as well. If fatal injury is not transportation related, leave both of these fields blank.

Once the *Other Factors* page is complete, select a navigation button at the bottom of the page:

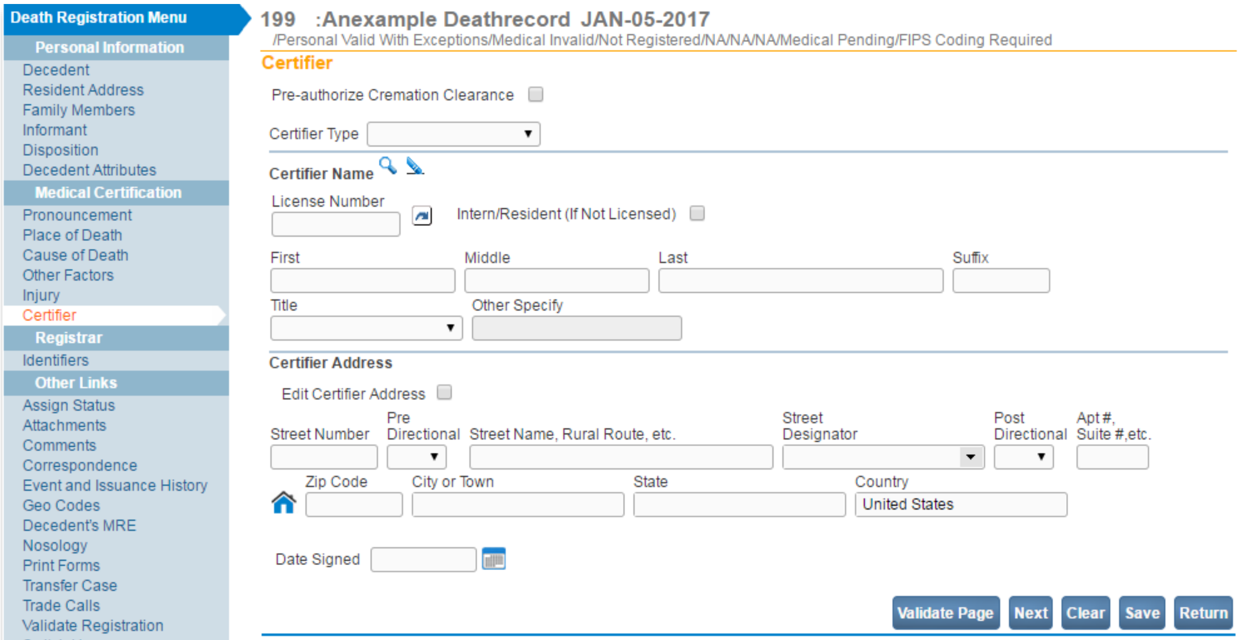
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

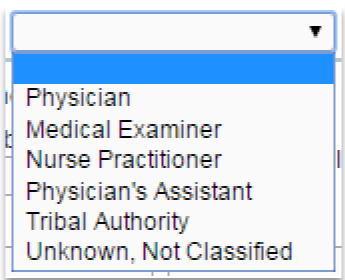
More information on record validation can be found in section *6 - Validation of Records*

4.6.6 Certifier

The Certifier page is used to record the type, license number, name, title, and address of the person legally responsible for certifying the decedent's cause of death.



Pre-authorize Cremation Clearance: This checkbox is only available to Medical Examiner's whom have intiated entry of the fetal death record. Selection of this checkbox allows the Medical Exminer to pre-authorize cremation clearance if the method of disposition is selected as cremation.

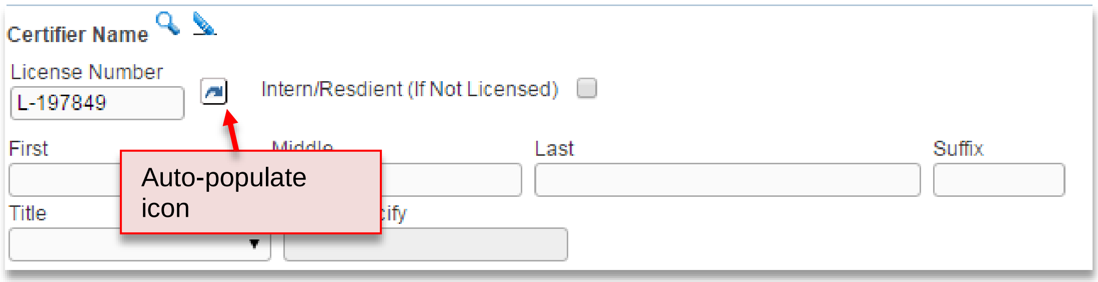


Certifier Type: The *Certifier Type* dropdown provides a lists of the different types of medical professionals who approve and certify the medical information provided in regards to the decedent's death.

Certifier Name/Certifier Address: There are three ways to complete the Certifier information.

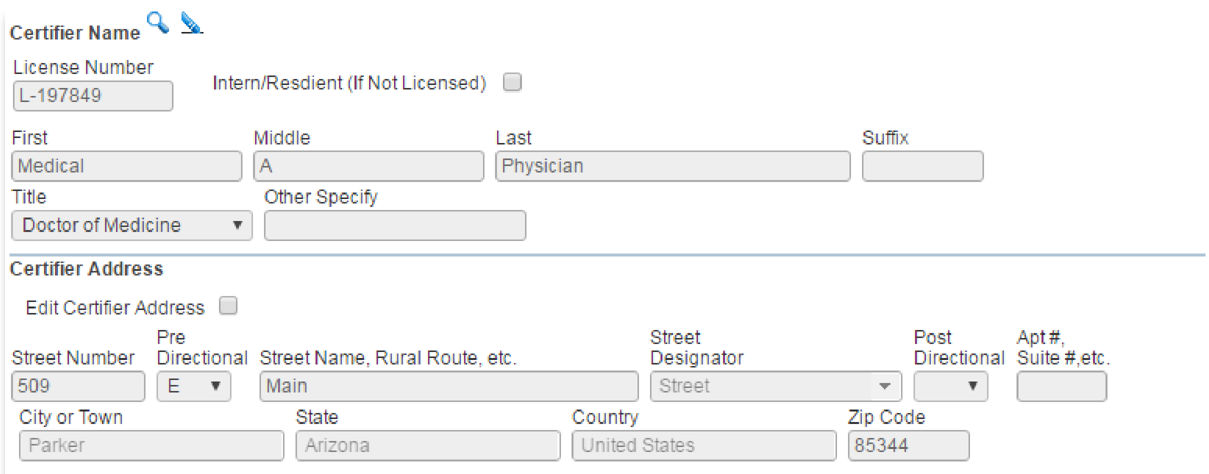
1. Manual entry of each item;
2. The *Certifier License Number* lookup and auto-populate icon; or
3. Standard LOV Lookup controls

Steps for using Certifier License Number to complete

1. Enter a Certifier's License Number
2. 

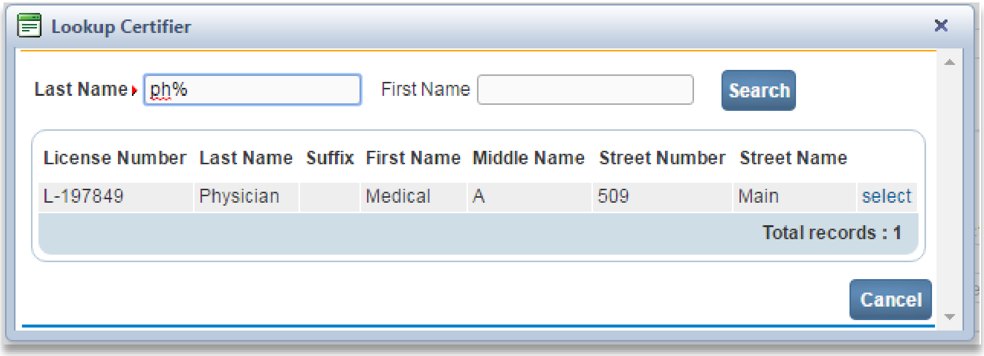
3. Select the auto-populat icon

The system will then auto-populate the *Certifier* name and the associated *Certifier Address* information.



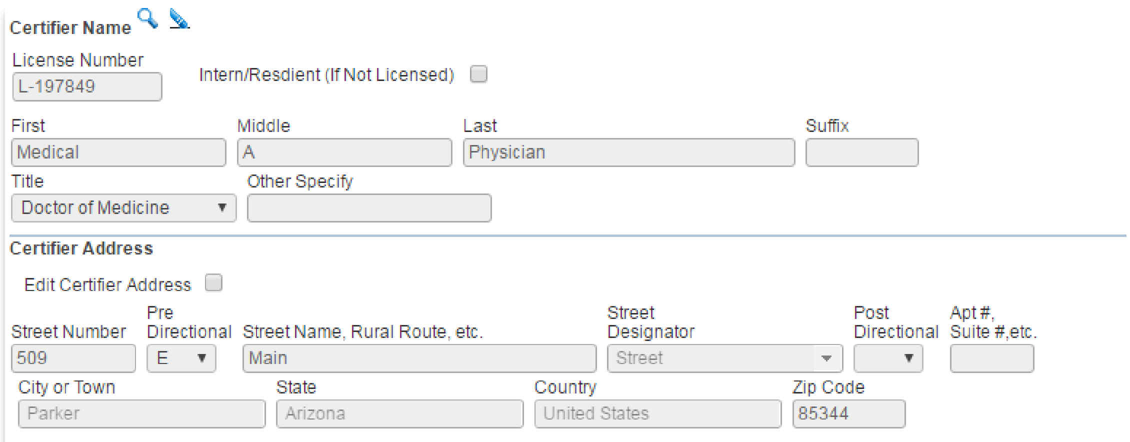
Steps for using the Standard LOV Lookup to complete

1. Select the *LOV* lookup tool to search for a certifier.
2. Enter the *Last* and *First Name* of the certifier; if known. If not known, a wildcard search can be performed by entering at least two characters in the *Last* name field followed by %.



From the *Search Results List* Select the link next to the correct Certifier.

3. The system will then auto-populate the *Certifier* name and the associated *Certifier Address* information.



If a medical certifier is entering the record the *Certifier Name* and *Certifier Address* will be system-filled when the case is created with the name of the certifier who started the record and the medical facility selected at log in.

Once this auto-completion has occurred the *Certifier Name* and *Certifier Address* can be updated by selecting the Eraser icon to clear the current entries and then following the steps above to enter the new certifier information.

Date Signed: Enter the *Date Signed* by the certifier manually, or select the calendar icon to launch the interactive calendar.

Once the *Certifier* page is complete, the *Medical Information* section of the death record is also complete. Select a navigation button at the bottom of the page:

The *Next* button is not available here as this is the final medical information page to complete within the Death Registraton menu.

Options for selection are the *Validate Page* button to check the page for errors, the *Clear* button to clear all entries, the *Save* button to save changes without leaving the page, or the *Return* button to return to the previous page.

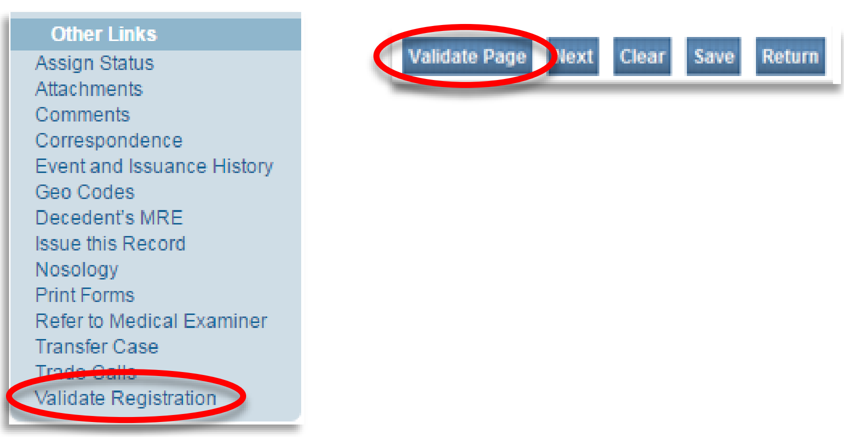
More information on record validation can be found in section *6 - Validation of Records*

4.6.7 Certify a Death Record

At this point in the process the *Medical Information* has been completed and a Medical Certifier responsible for entering this information will need to *Affirm* and *Certify* the record.

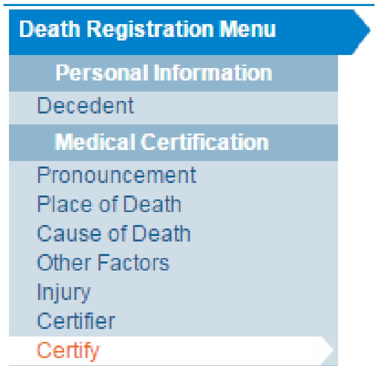
If the record is being entered at the State or a County Vital Records Office, affirmation and certification are not required and the steps for this process can be skipped.

The user affirming and signing the record should select the *Validate Page* button or *Validate Registration* link to check the record for errors and/or omissions.



More information on record validation can be found in section *6 - Validation of Records*

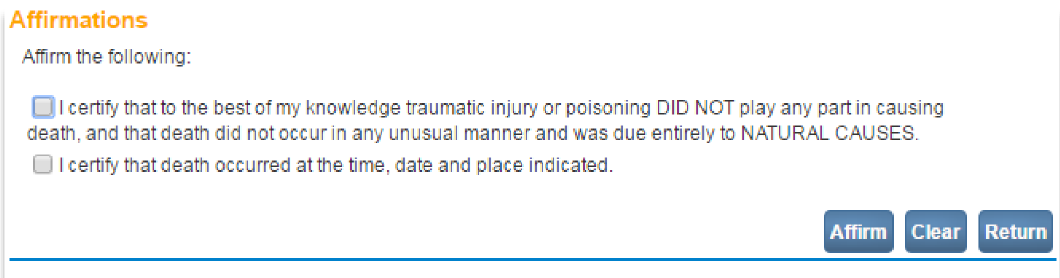
Once the record has passed all validation rules, a *Certify* link will appear at the bottom of the *Medical Information* submenu.



Steps to Affirm and Certify the Medical Information

1. Choose the *Certify* link

2. Select the checkbox next to the listed affirmations and then select *Affirm*.



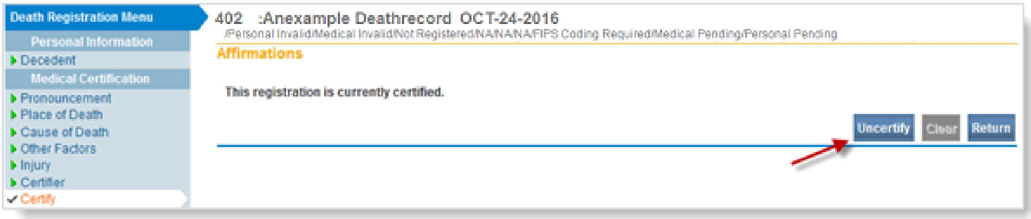
3. An Authentication successful message will be displayed and a checkmark placed next to the *Certify* link indicating the Personal Information has been affirmed.

Once the record is certified the pages within the *Medical Information* sub-menu are locked and cannot be edited.

If the record is not yet registered and updates need to be made to any of the items in the Medical Information section, the record can be unaffirmed/uncertified. Doing so unlocks the pages within the Personal Information sub-menu so they can once again be edited.

Steps to Unaffirm and Unsign the Medical Information

1. To unsign the registration, select the *Certify* link.



2. Select *Uncertify*.

3. Select *OK* to confirm the reversal.

Once uncertified, the *Medical Information* pages are again available to edit.

5. Fetal Death Registration Basics

5.1 Initiating Fetal Death Records

The creation and registration of a fetal death record typically involves just one particpant:

Certifying
Medical
Records
Professional

Particpants may change:

- When a Funeral Home is involved
- When a Medical Examiner is involved
- When the State or County Registrar is involved

5.2 Fetal Death Record Ownership

DAVE™ separates the ownership of the fetal death record into two sections:

Personal/Disposition Information Owner: The office or medical facility responsible for disposition and completion of the personal information.

Medical Information Owner: The office or medical facility responsible for completion of the medical information.

Below are some illustrations of how ownership and intiation of the death record may interact in DAVE™:

1 

The case is started and completed by the Medical Facility where the event occurred. The Personal and Medical information ownership is the responsibility of the Medical Facility.

2 

A Medical Facility initiates the case and becomes owner of the Personal and Medical Information

The Medical Facility transfers ownership of the Personal information to a Funeral Director

3 

The case is started and completed at the County or State Registrar's Office who assumes ownership of and responsibility for transcribing both Personal and Medical Information from a paper document.

4 

Occasionally, there may not be a Medical Facility involved in a case. In these instances the Medical Examiner's office becomes the owner of both the Personal Information and Medical information and is responsible for completing the entire record.

The fetal death registration functions in DAVE™ are restricted based on case ownership.

5.3 Fetal Death Registration Menu

The Fetal Death Registration Menu provides links to the pages that are used in the submission and registration of death records. Menus in DAVE™ are built dynamically based on user security profiles. This means that a state office worker will be presented a different set of pages and menu options than a medical facility user. The pages available may vary over the processing life of a fetal death record.

The pages that comprise the Fetal Death Registration Menu are grouped into sub-menus.

Personal Information – Pages for gathering personal information, such as information regarding the mother and relevant details of the mother's health before the fetal death occurred.

Medical Information – Pages for entering information regarding medical factors of the fetal death.

Registrar – Pages for entering local or state registrar-targeted information.

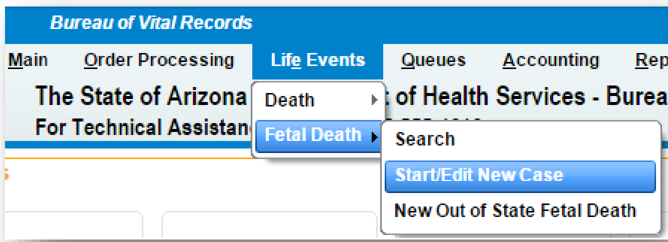
Other Links – Pages appearing under this sub-menu allow the user to enter additional information related to the fetal death registration, such as disposition, comments and correspondence, etc.

All sub-menus may not be available to all users. Even if a sub-menu is presented, different pages and items available to view and/or enter within the pages may be displayed depending on security privileges granted to the user.

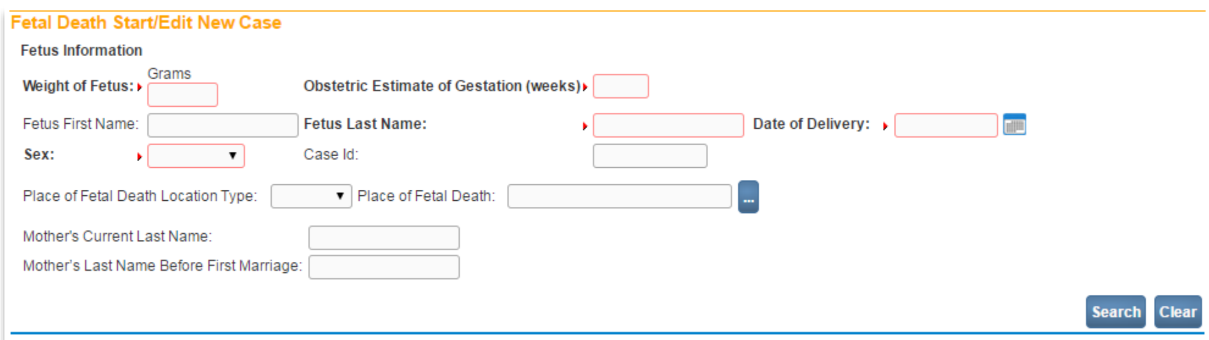
5.4 Start a New Fetal Death Case

The first step in entering a new fetal death record is to search for any existing records to prevent the creation of duplicates.

1. From the Main Menu select *Life Events > Fetal Death > Start/Edit New Case*



2. To start a new case the the required fields, (denoted by red arrows), must be completed.



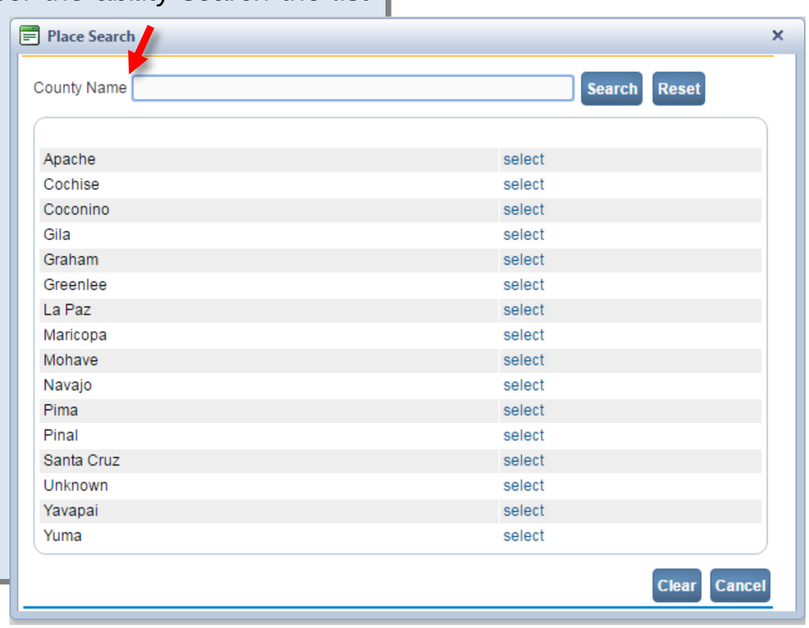
When selected the Lookup icon provides a *Place Search* popup.

The *Place Search* popup provides the user the ability search the list and select a place.

The three available search options are:

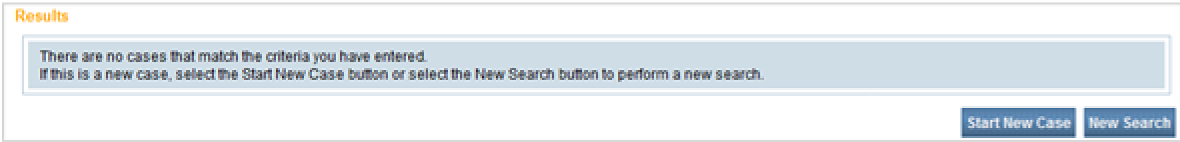
- Enter the full *County or City Name* and select *Search*.
- Enter a partial County or City name followed by the wildcard symbol and select search. For example, entering "gr%" will return all places that start with the letters "gr".

Browse the list for the correct location and click *Select*.



3. Complete the required fields and select the *Search* button. DAVE™ will use the criteria entered to search for matching records.

If no matching records are returned, the *Results* screen will display a message indicating so.

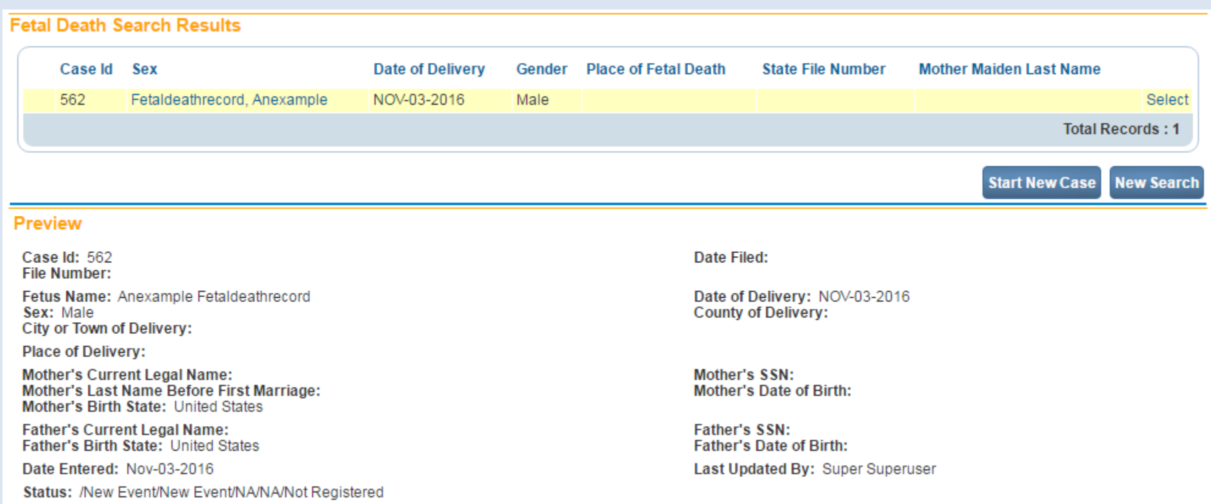


4. Select *Start New Case* to create the new record

If a **matching record is found**, the *Results* screen will display that case in the results list.

Select *Preview* to view a summary of the case and ensure it is not a duplicate.

A *Preview* of the case, in summary form, will display below the *Results* page list.



- If it is determined **the case is a duplicate** choose the *Select* link to be taken to the *Death Registration* page to work on or review items for that case.
- If it is determined **the case is not a duplicate**, select the *Start a New Case button.*

5.5 Fetal Death Personal Information Pages

5.5.1 Fetus

The first page of **Items to Enter** under the *Personal Information* submenu is the Fetus page.

The items entered on the *Start Edit New Case* page will be system filled on the Fetus page, such as *Fetus First* and *Last Name, Date of Delivery*, and *Sex*. If any of these items were entered incorrectly upon starting the fetal death record, they can be updated on this page.

Will Funeral Director be responsible for final disposition: This question is available for completion to the medical facility completing the record. It is defaulted to 'No' and should only be updated to 'Yes' if a funeral director will be involved in completing the personal and disposition information for the fetal death record.

Fetus Name: In many cases the parents will not choose to name the fetus. If the fetus is not named, select the *Not Named* checkbox. Otherwise, enter the fetus *First*, *Middle*, and *Last* name. *Suffix* is used to record generational suffixes such as Jr., III, etc.

Date of Delivery: The Date of Delivery dropdown is populated with the information entered when the case was created. If the date entered was incorrect, enter the *Date of Delivery* manually or select the Calendar icon to launch the Interactive Calendar.

Time of Delivery: Enter the hour and minute of delivery and make a selection from the AM/PM/Military dropdown.

Sex: The Sex dropdown is populated with the selection made when the case was created. If the sex entered was incorrect, choose the correct value from the dropdown.

Once the Fetus page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

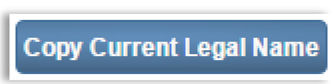
Other options include selection of the *Validate Page* button to check the page for errors, the *Clear* button to clear all entries since the last save, the *Save* button to save changes without leaving the page, or the *Return* button to return to the *Start/Edit New Case* page.

More information on record validation can be found in section *6 - Validation of Records*

5.5.2 Mother

The Mother page **Items to Enter** are designed to gather information about the mother including current legal name and name prior to first marriage. The *First* and *Last* name fields are required. *Middle* can either be middle name or middle initial.

Mother's Current Legal Name: Enter the *First*, *Middle*, and *Last* name of the mother. *Suffix* is used to record generational suffixes such as Jr., III, etc.



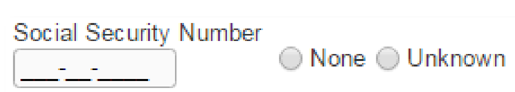
Mother's Name Prior to First Marriage: If *Mother's Name Prior to First Marriage* is the same as the *Current Legal Name* simply select the *Copy Current Legal Name* button. This will copy the *First, Middle, Last Name* and *Suffix* from *Mother's Current Legal Name* into the corresponding *Mother's Name Prior to First Marriage* fields.

If the mother's name differs between *Mother's Current Legal Name* and *Mother's Name Prior to First Marriage*, then enter the *First*, *Middle*, and *Last* name of the mother prior to first marriage. *Suffix* is used to record generational suffixes such as Jr., III, etc.

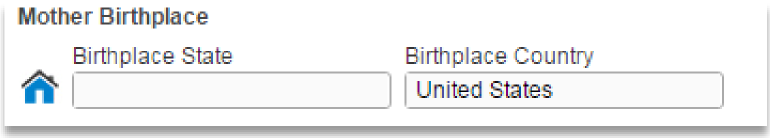
Date of Birth and Age: Enter the *Date of Birth* manually or select the Calendar icon to launch the Interactive Calendar.

Enter the mother's age manually, or use the Auto-populate icon to calculate mother's age based on the date entered in the *Date of Birth* field.

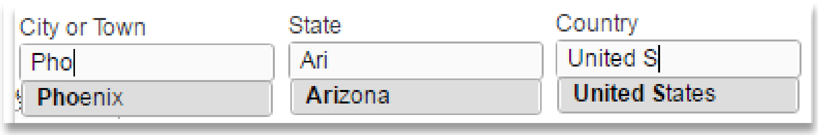
Social Security Number: Enter the mother's social security number in the *Social Security Number* field. If mother has no SSN, select *None*. If the mother's SSN is not known, select *Unknown*.



Mother's Birth Place: Enter the mother's place of birth. If needed, the Places Lookup icon can be used to facilitate selection of the City, State, and Country from a list.



The system also includes a predictive text feature that attempts to determine the place being entered while typing. Possible matches for City, *County*, *State* or *Country* will be displayed.



Once the Mother page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

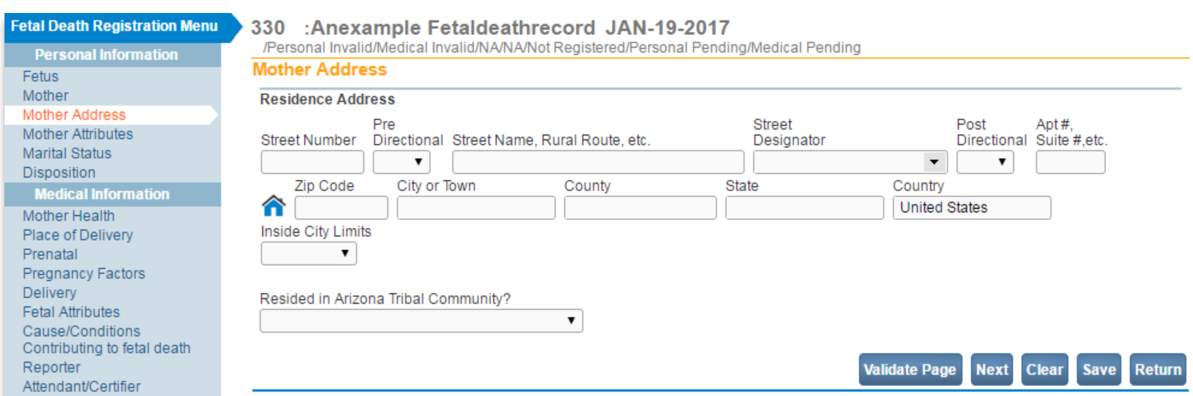
Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.5.3 Mother Address

The Mother Address page **Items to Enter** record the mother's residence address.

Street Address: The components of the Street Address are the Street Number, Pre-Directional, Street Name, Street Designator, Post-Directional and Apartment/Suite. The Street Designator and the Pre- and Post-Directionals can be selected from a drop-down list.



City, County, State, Country, Zip: If needed, the Places Lookup icon can be used to allow selection of the correct *City*, *County*, *State* and *Country* from a list.

The system also includes a predictive text feature that attempts to determine the place being entered while typing. Possible matches for City, *County*, *State* or *Country* will be displayed.

Inside City Limits: Make a selection from the *Inside City Limits?* dropdown list to indicate whether or not the mother's residence address is within city limits. A selection of 'Unknown' is avaliable in the list.

Resided in Arizona Tribal Community: Select the tribal community the mother resided in or select No, or Unknown.

Once the Mother Address page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

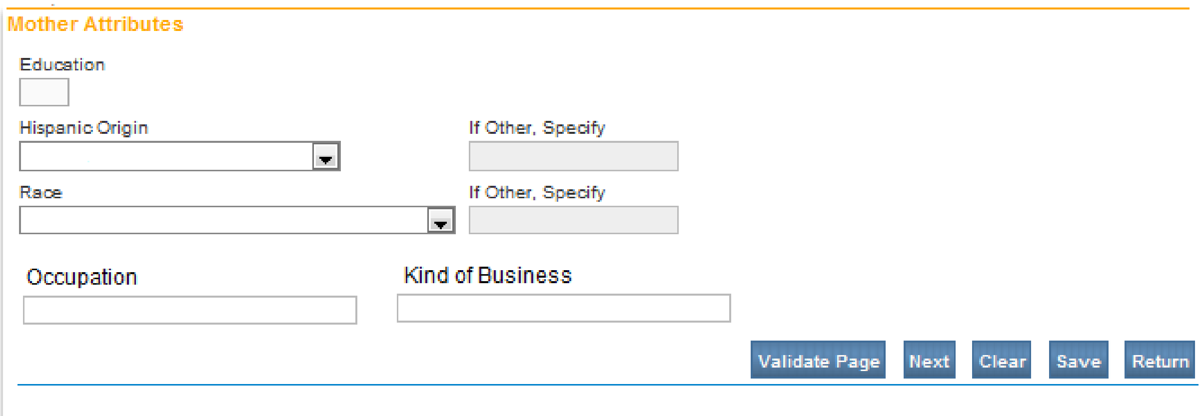
More information on record validation can be found in section *6 - Validation of Records*

5.5.4 Mother Attributes

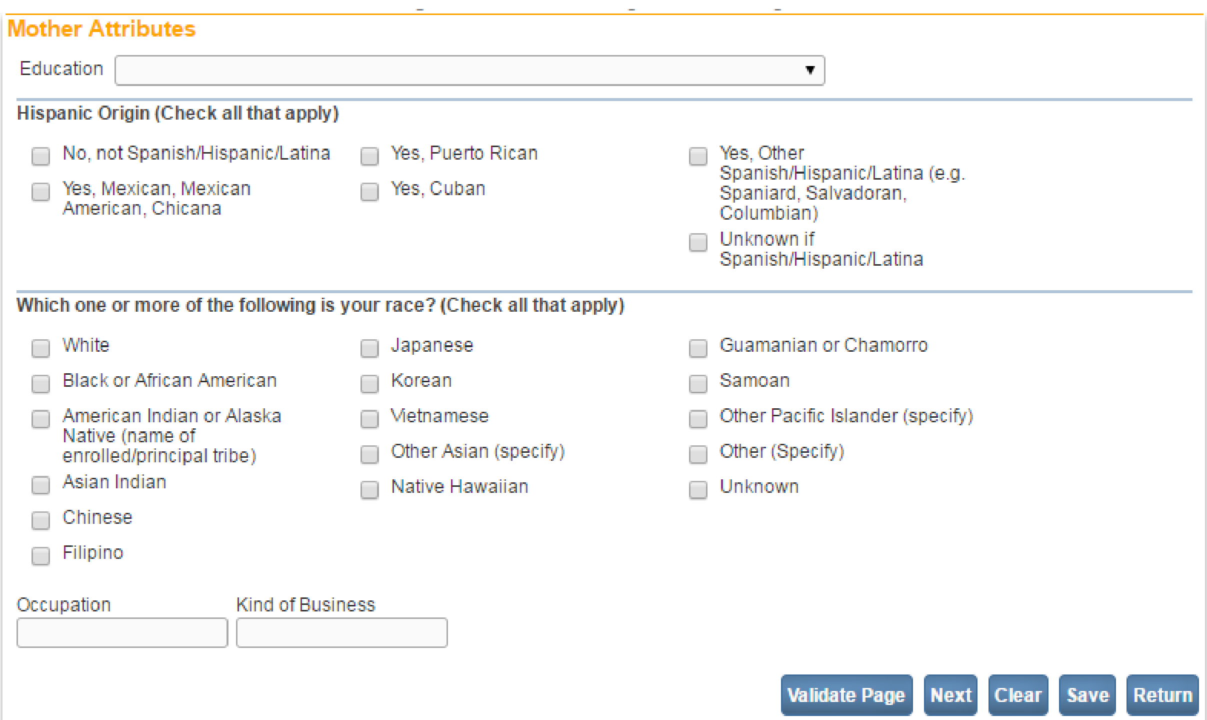
The Mother Attributes page **Items to Enter** collect information pertaining to the mother's occupation, education, ancestry and race.

Format Change: The 2003 US Standard Certificate Revision included format changes for the collection of race, ancestry and education data. The DAVE™ application provides the prior version of the Mother Attributes page for those fetal deaths occurring before January 1, 2013 when Arizona adopted the revision.

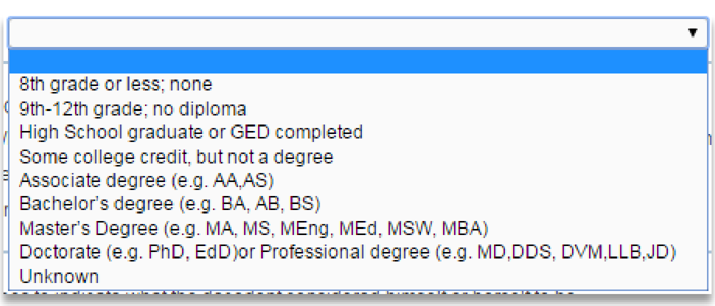
Prior Mother Attributes page:



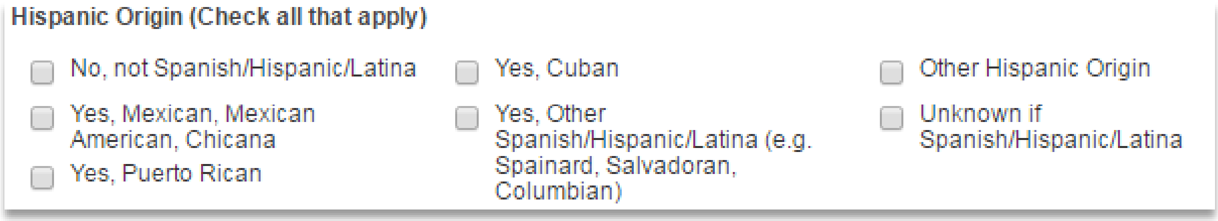
Current Mother Attributes page:



Mother's Education: Select mother's education level from the dropdown list. If not known, select *Unknown*.

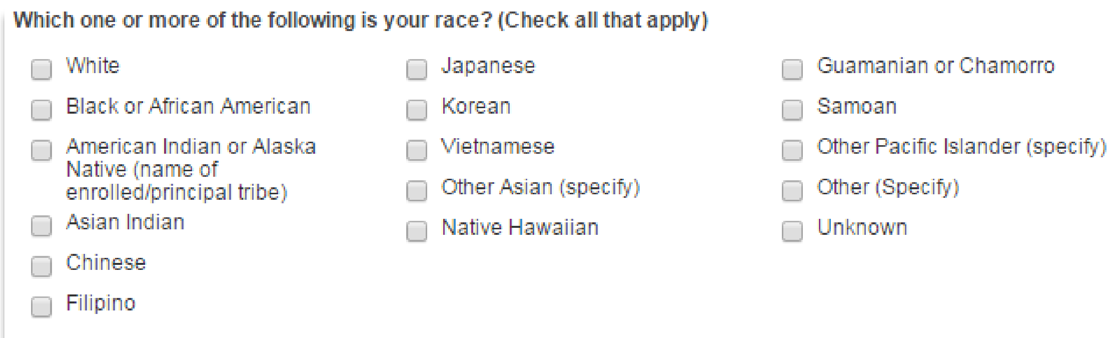


Hispanic Origin: Select a value which indicates the mother's *Hispanic Origin.* More than one value can be selected.



If *Other* is selected, a text field will display below *Other* in which the selection can be specified.

Mother's Race: Select a value which indicates the Mother's *Race.* More than one value can be selected.



If *American Indian or Alaska Native* is chosen, two dropdowns listing possible tribe affiliation(s) will be displayed. Select the decedent's specific tribe(s) using one or both of the dropdown boxes.

If *Other(Specify)*, *Other Asian* or *Other Pacific Islander* are selected, two text fields will be displayed in which the selection can be specified.

> If the case is not registered and the date of delivery is changed from a date that is after the adoption of the US standard 2003 certificate to a date prior, the values entered for those fields unique to the 2003 standard will be set to null and the 1989 US standard pages will be displayed.
>
> If the date of death is changed from a date that is prior to the adoption of the US standard 2003 certificate to a date after, the values entered for those fields unique to the 1989 standard will be set to null and the 2003 US standard pages will be displayed.

Occupation: Enter Mother's occupation.

Kind of Business: Enter the business which the Mother was associated.

Once the Mother Attributes page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

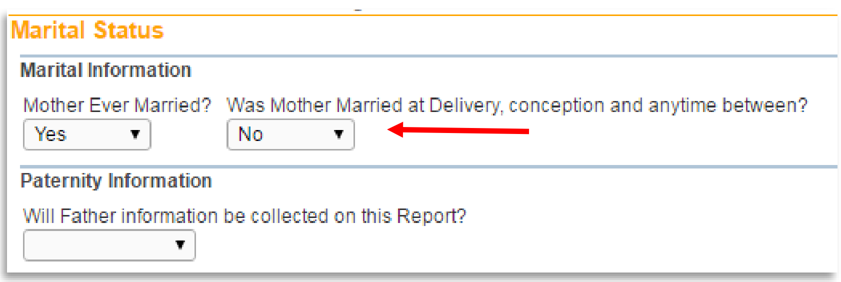
More information on record validation can be found in section *6 - Validation of Records*

5.5.5 Marital Status

The **Marital Status** page is used to gather Marital Information and enable the collection of Father information if applicable.

Mother Ever Married: Make a selection of *Yes*, *No* , or *Unknown* from the dropdown. A selection of '*No*' will disable the need to enter information in regards to the *Was Mother Married at Delivery, conceptuon of anytime in between* question. **Mother Ever Married:** Make a selection of *Yes*, *No*, or *Unknown* from the dropdown.

A selection of '*No'* will enable the Will Father information be collected on the Report question.



A selection of '*Yes'* will display two new pages, used to collect father information: *Father* and *Father Attributes,* in the Fetal Death Registration menu.

Will Father information be collected on this report: If enabled, make a selection of *Yes*, *No*, or *Unknown* from the dropdown. A selection of *Yes* will enable two new pages in the Fetal Death Registration menu used to collect father information: Father and Father Attributes.

Once the Marital Status page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.5.6 Father

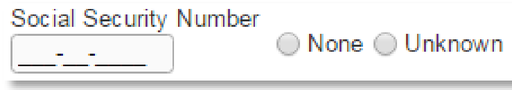
The Father page **Items to Enter** are designed to gather information about the father including father's name. The *First* and *Last* name fields are required. *Middle* can either be middle name or middle initial.

Father's Name: Enter the *First*, *Middle*, and *Last* name of the mother. *Suffix* is used to record generational suffixes such as Jr., III, etc.

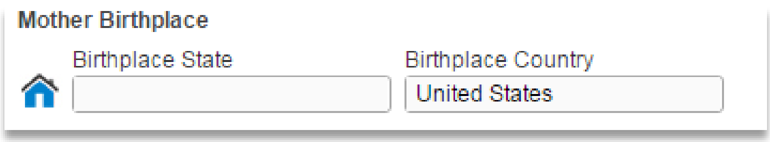
Date of Birth and Age: Enter the *Date of Birth* manually or select the Calendar icon to launch the Interactive Calendar.

Enter the father's age manually, or use the Auto-populate icon to calculate mother's age based on the date entered in the *Date of Birth* field.

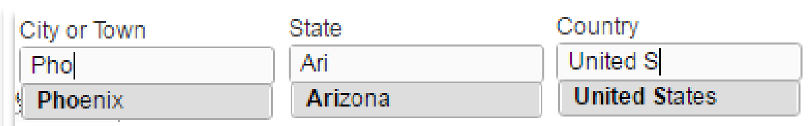
Social Security Number: Enter the father's social security number in the *Social Security Number* field. If father has no SSN, select *None*. If the father's SSN is not known, select *Unknown*.



Father's Birth Place: Enter the father's place of birth. If needed, the Places Lookup icon can be used to facilitate selection of the City, State, and Country from a list.



The system also includes a predictive text feature that attempts to determine the place being entered while typing. Possible matches for City, *County*, *State* or *Country* will be displayed.



Once the Father page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous page.

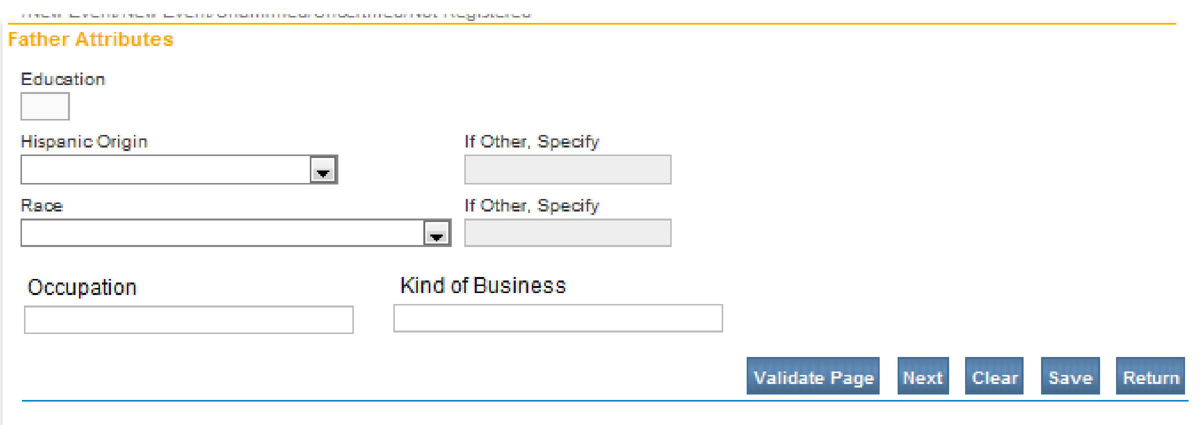
> More information on record validation can be found in section *6 - Validation of Records*

5.5.7 Father Attributes

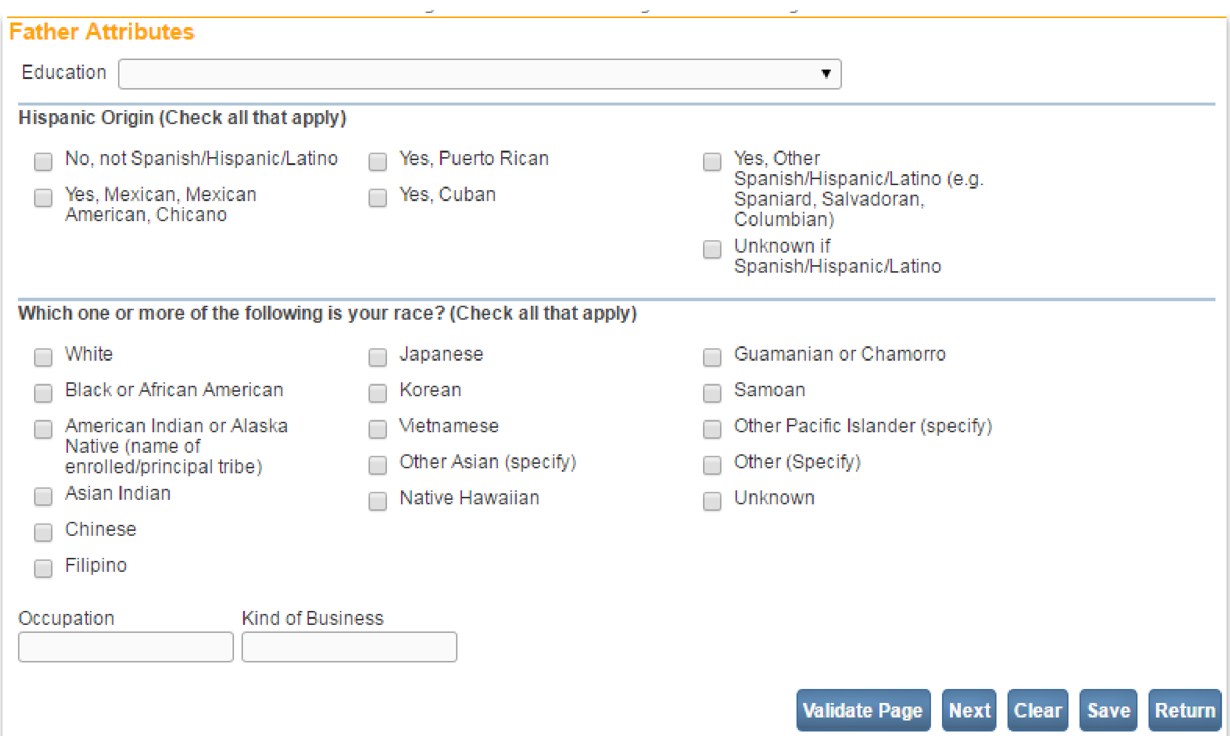
The Father Attributes page **Items to Enter** collect information pertaining to the mother's occupation, education, ancestry and race.

Format Change: The 2003 US Standard Certificate Revision included format changes for the collection of race, ancestry and education data. The DAVE™ application provides the prior version of the Father Attributes page for those fetal deaths occurring before January 1, 2013 when Arizona adopted the revision.

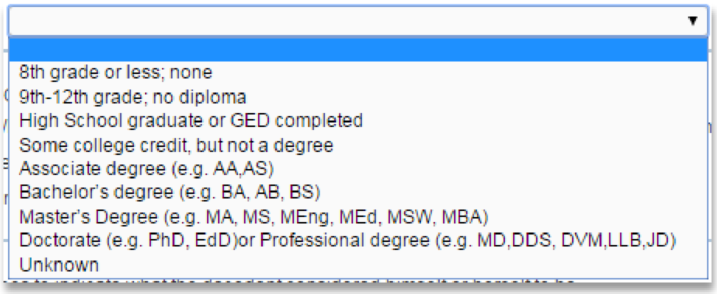
Prior Father Attributes page:



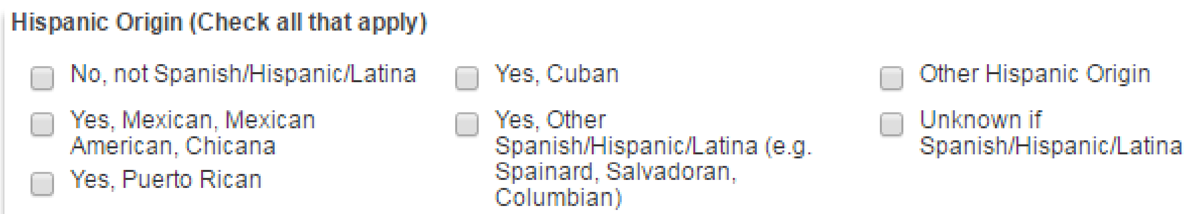
Current Father Attributes page:



Father's Education: Select father's education level from the dropdown list. If not known, select *Unknown*.

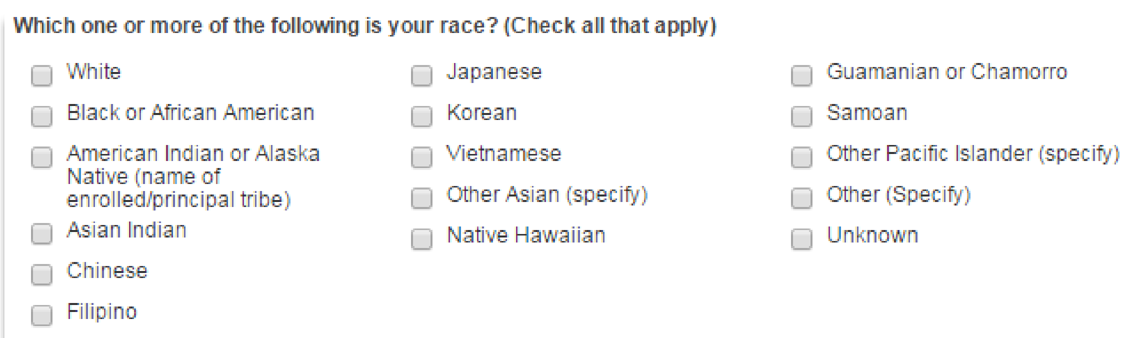

8th grade or less; none
9th-12th grade; no diploma
High School graduate or GED completed
Some college credit, but not a degree
Associate degree (e.g. AA,AS)
Bachelor's degree (e.g. BA, AB, BS)
Master's Degree (e.g. MA, MS, MEng, MEd, MSW, MBA)
Doctorate (e.g. PhD, EdD)or Professional degree (e.g. MD,DDS, DVM,LLB,JD)
Unknown

Hispanic Origin: Select a value which indicates the father's *Hispanic Origin.* More than one value can be selected.


Hispanic Origin (Check all that apply)
No, not Spanish/Hispanic/Latina
Yes, Mexican, Mexican American, Chicana
Yes, Puerto Rican
Yes, Cuban
Yes, Other Spanish/Hispanic/Latina (e.g. Spainard, Salvadoran, Columbian)
Other Hispanic Origin
Unknown if Spanish/Hispanic/Latina

If *Other* is selected, a text field will display below *Other* in which the selection can be specified.

Father's Race: Select a value which indicates the Father's *Race.* More than one value can be selected.


Which one or more of the following is your race? (Check all that apply)
White
Black or African American
American Indian or Alaska Native (name of enrolled/principal tribe)
Asian Indian
Chinese
Filipino
Japanese
Korean
Vietnamese
Other Asian (specify)
Native Hawaiian
Guamanian or Chamorro
Samoan
Other Pacific Islander (specify)
Other (Specify)
Unknown

If *American Indian or Alaska Native* is chosen, two dropdowns listing possible tribe affiliation(s) will be displayed. Select the decedent's specific tribe(s) using one or both of the dropdown boxes.

If *Other(Specify)*, *Other Asian* or *Other Pacific Islander* are selected, two text fields will be displayed in which the selection can be specified.

> If the case is not registered and the date of delivery is changed from a date that is after the adoption of the US standard 2003 certificate to a date prior, the values entered for those fields unique to the 2003 standard will be set to null and the 1989 US standard pages will be displayed.
>
> If the date of death is changed from a date that is prior to the adoption of the US standard 2003 certificate to a date after, the values entered for those fields unique to the 1989 standard will be set to null and the 2003 US standard pages will be displayed.

Occupation: Enter Father's occupation.

Kind of Business: Enter the business which the Father was associated.

Once the Father Attributes page is complete, select a navigation button at the bottom of the page:

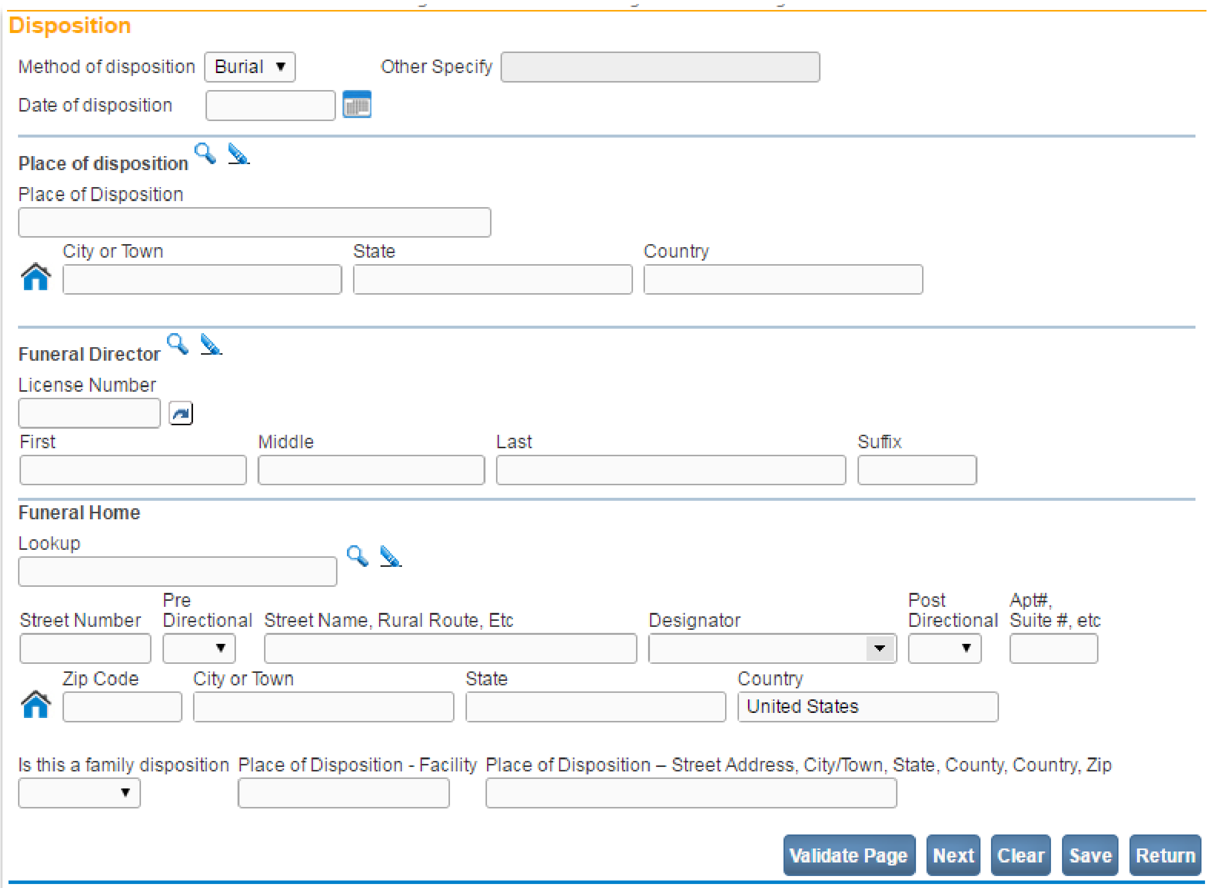
Selection of the Next button will save the data entered and proceed to the next page.

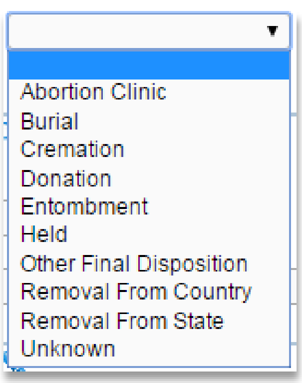
Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

> More information on record validation can be found in section *6 - Validation of Records*

5.5.8 Disposition

The Disposition page **Items to Enter** collect information pertaining to the disposition including the Method, Date and Place of Disposition as well as the Funeral Home and Director responsible for disposition.

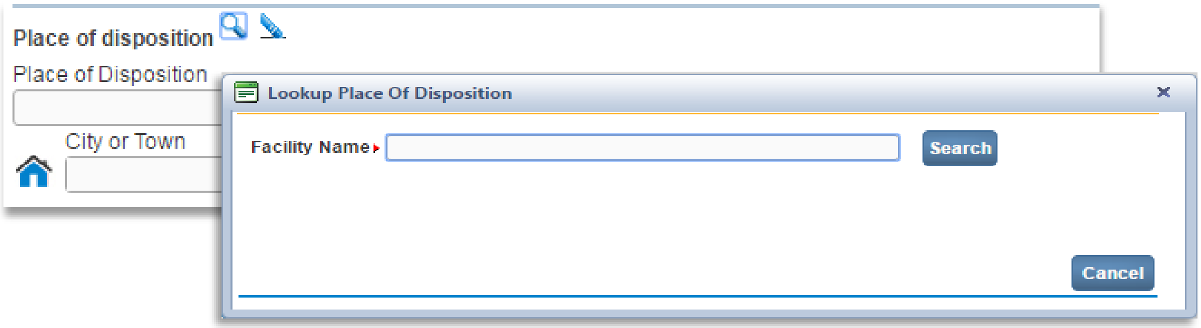




Method of Disposition: Make a selection from the *Method of Disposition* dropdown list. If the method does not appear in the list then *Other Final Disposition* can be selected and a method of disposition can be specified in the *Other Specify* text entry box.

Date of Disposition: Enter the *Date of Disposition* manually or select the Calendar icon to launch the Interactive Calendar.

Place of Disposition: The *Place of Disposition* can be entered manually or the LOV Lookup icon can be used to launch the *Lookup Place of Disposition* search tool.

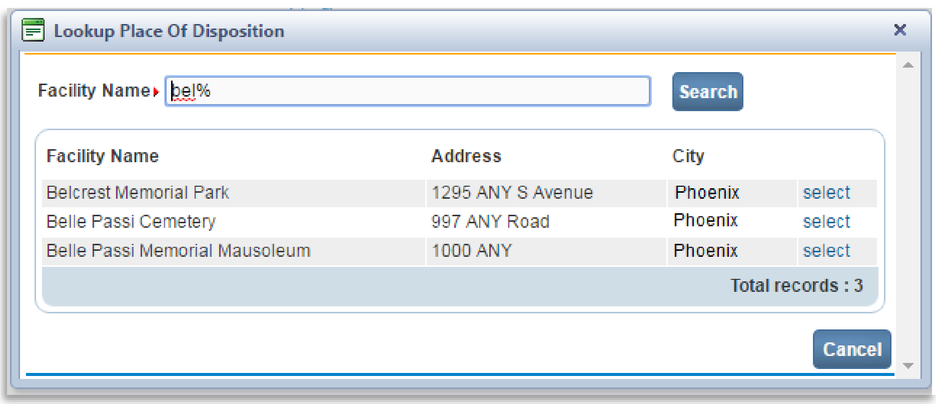


1. In the *Faclity Name* field, **enter the full name of the facility**, if known, and choose *Search*.

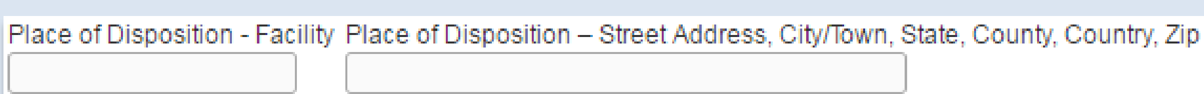
If the full name of the facility is not known, **enter at least two letters followed by the %**, then **select search** to perform a wildcard search.

2. A list of available facilities will be returned. **Select the *select* link** next to the correct facility in the list.

The selection system-fills all of the corresponding fields for Place of Disposition on the Disposition page.



If the selected Method of disposition indicates that there are **multiple places of disposition**, then the additional fields needed to collect the secondary *Place of Disposition* may be completed at the bottom of the page.



If a funeral director is completing the disposition the *Funeral Home* will be system-filled with the name of the funeral home whom has ownership of the personal information.

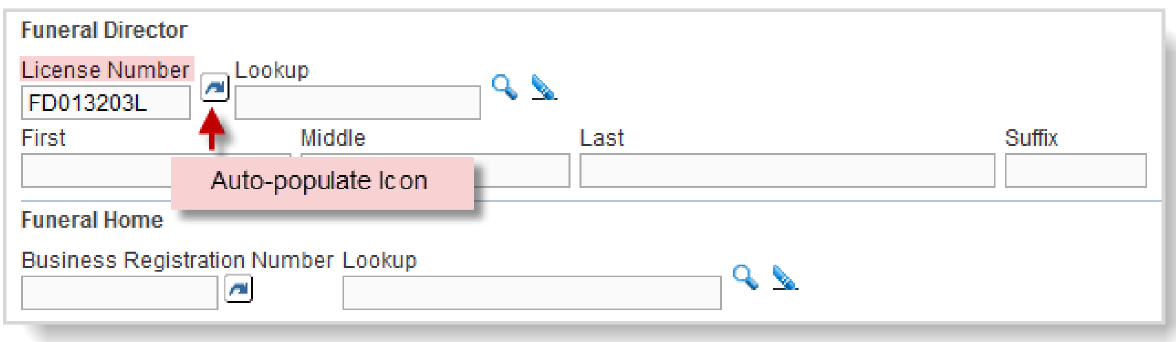
Funeral Director/Funeral Home: There are three ways to complete the Funeral Director/Funeral Home information.

1. Manual entry of each item;
2. The Funeral Director *License Number* and auto-populate icon; or
3. Standard LOV Lookup controls

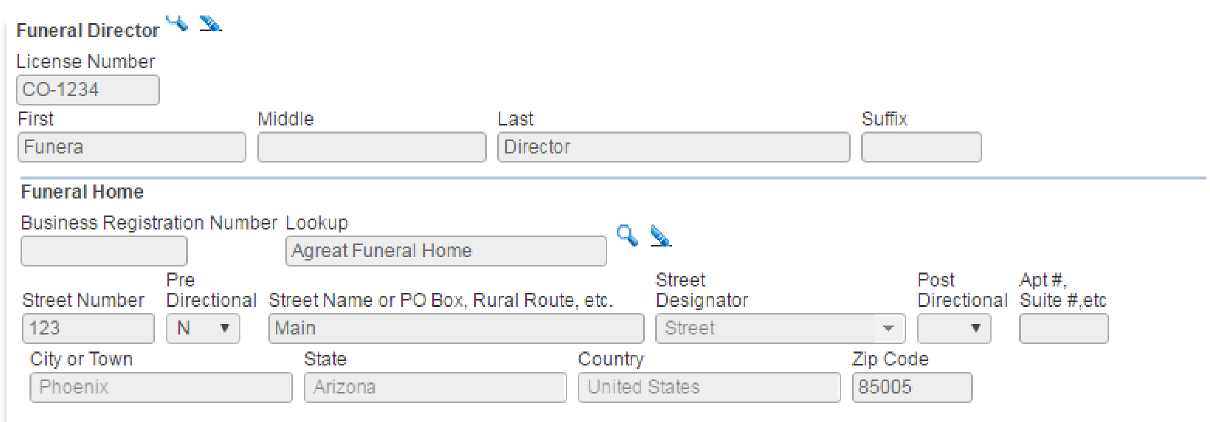
Steps for using Funeral Director License Number to complete

1. Enter a Funeral Director's License Number

2. Select the auto-populate button



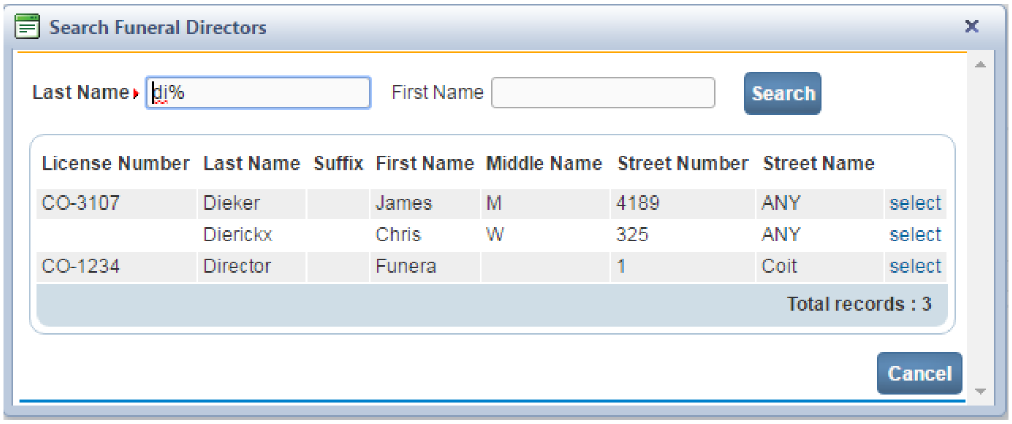
The system will then auto-populate the *Funeral Director* name. Note that *Funeral Home* is system-filled with the facility selected at login.



Steps for using the Standard LOV Lookup to complete

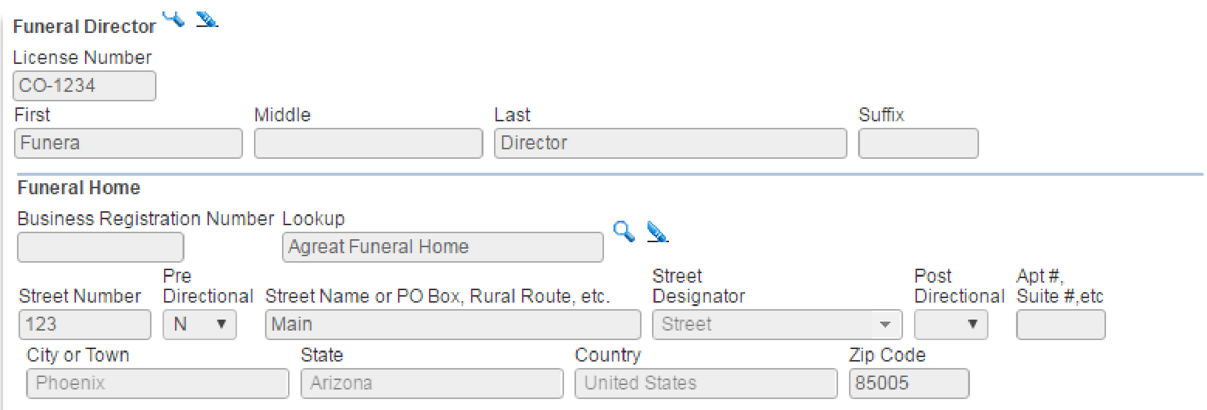
1. Select the *LOV* lookup tool to search for a funeral director.

2. Enter in the *Last* and *First Name* of the funeral director; if known. If not known a wildcard search may be performed by entering at least two characters followed by a percent sign (%) in the *Last* name field.



3. From the Search Results List select the *Select* link next to the correct Funeral Director.

The system will then auto-populate the *Funeral Director* name. Note that *Funeral Home* is system-filled with the facility selected at login.



Auto-population of the Funeral Home data will occur only if the Funeral Director selected is associated with a single funeral home. If the Funeral Director is associated with multiple funeral homes, the correct funeral home data must be manually entered or searched for and selected.

To search for a funeral home,
1. Select the Funeral Home *LOV* lookup tool
2. In the Facility Name field enter the full name of the facility or use a wildcard search by entering the first two letters followed by a % and selecting search
3. Select the correct funeral facility from the search results list and the system will auto-populate it on the page.

Is this a family disposition: Select Yes from the dropdown if the disposition is a family disposition. Select No if it is not.

Once the *Disposition* page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.5.9 Affirm the Fetal Death Record

At this point in the process the *Personal Information* has been completed and the Funeral Director or Medical user responsible for this information will need to *Affirm* the record.

If the record is being entered at the State or a County Vital Records Office, affirmation is not required and the steps for this process can be skipped.

If both the *Personal* and *Medical Information* is being entered by a medical facility user, completing this individual affirmation step is not required.

Once both *Personal* and *Medical Information* is complete an *Affirm/Certify* link will be made available allowing the medical facility user to *Affirm* the *Personal Information* at the same time as *Certifying* the *Medical Information*.

The user affirming the record should select the *Validate Page* button or *Validate Registration* link to check the record for errors and/or omissions.

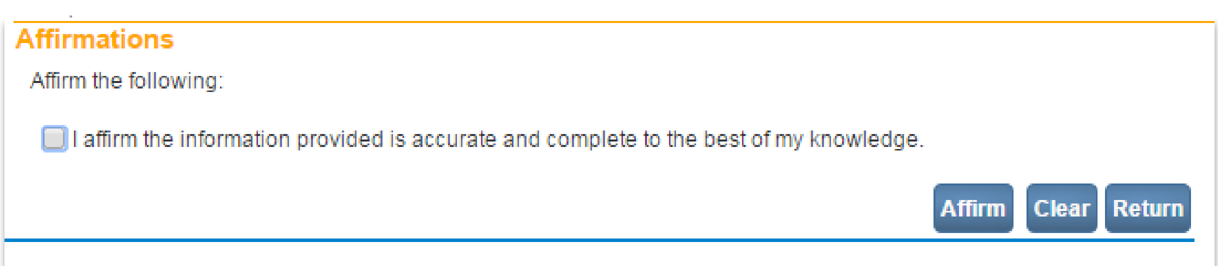
More information on record validation can be found in section *6 - Validation of Records*

Once the record has passed all validation rules, an *Affirm* link will appear at the bottom of the Personal Information submenu.

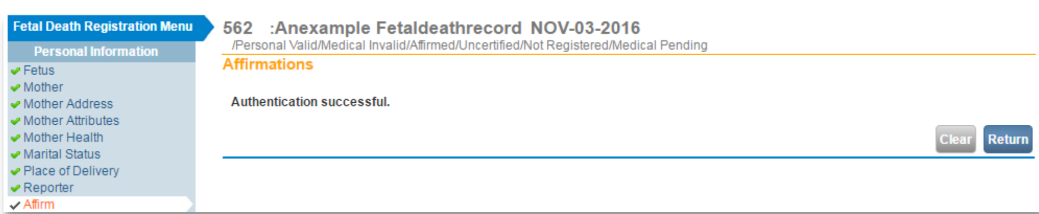
Steps to Affirm the Personal Information

1. Select the Affirm link

2. Place a checkmark next to all affirmations and select the Affirm button.



3. An Authentication successful message will be displayed and a checkmark placed next to the *Affirm* link indicating the Personal Information has been affirmed.

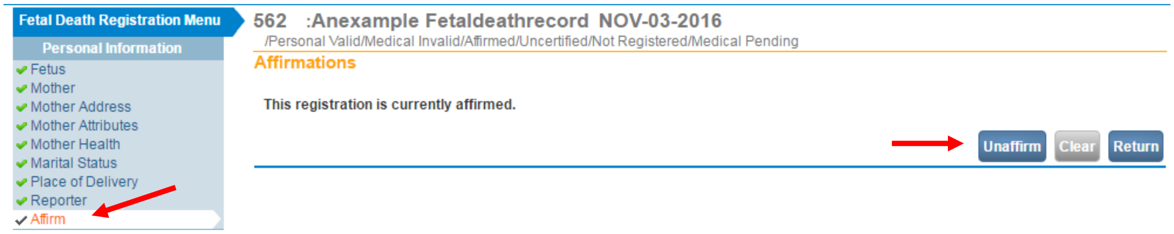


Once the record is signed the pages within the *Personal Information* sub-menu are locked and cannot be edited.

If the record is not yet registered and updates need to be made to any of the items in the Personal Information section, the record can be unaffirmed. Doing so unlocks the pages within the Personal Information sub-menu so they can once again be edited.

Steps to Unaffirm the Personal Information

1. To unsign the registration, select the *Affirm* link.



2. Select *Unaffirm*.

3. Select *OK* to confirm the reversal.

Once unaffirmed, the *Personal Information* pages are again available for editing.

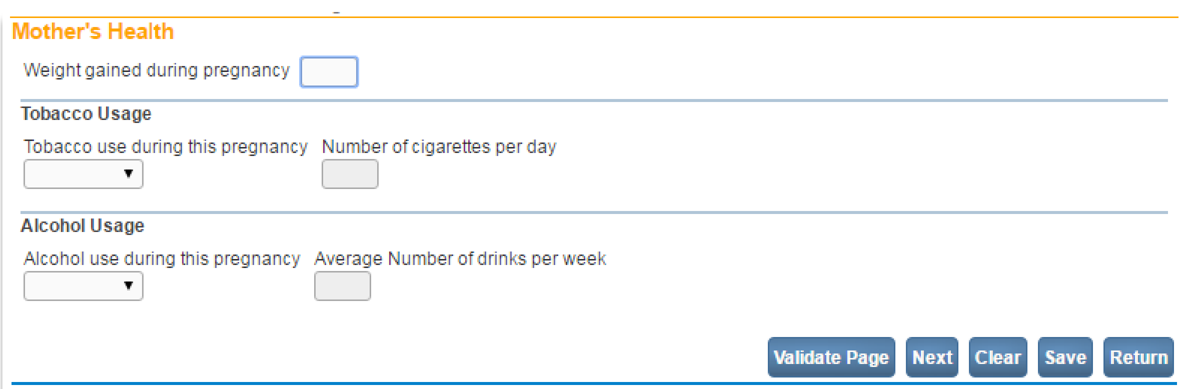
5.6 Fetal Death Medical Information Pages

5.6.1 Mother Health

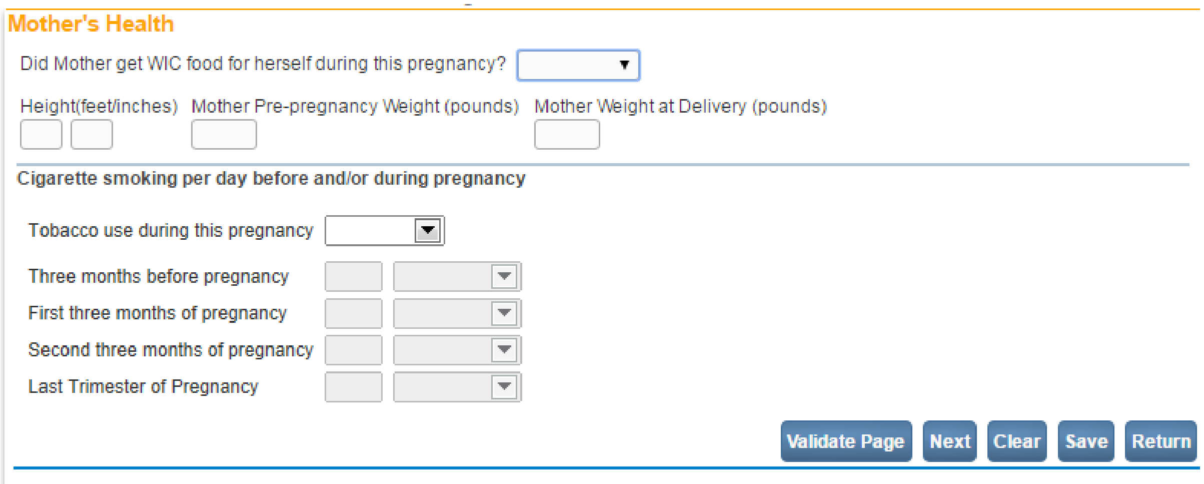
The **Mother Health** page is used to gather statistical data relative to the mother's health and personal habits. This data is used to analyze the effect of the mother's health and behavioral habits on the fetus.

Format Change: The 2003 US Standard Certificate Revision included format changes for the collection of mother's health data. The DAVE™ application provides the prior version of the Mother Attributes page for those fetal deaths occurring before January 1, 2013 when Arizona adopted the revision.

Prior Mother Health page:



Current Mother Health page:



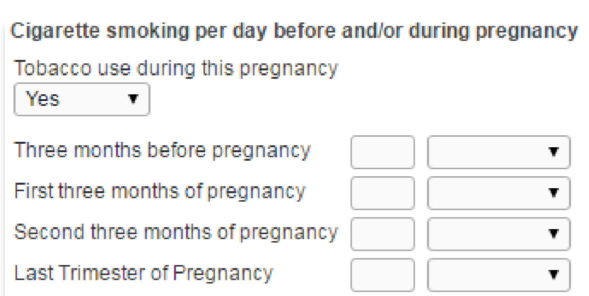
Did Mother get WIC food for herself during this pregnancy? Make a selection of *Yes*, *No* , or *Unknown* from the dropdown.

Height (feet/inches): Collection of this item consists of two numeric entry controls. Enter the mother's height in feet in the first box and height in inches in the second. If the height is unknown then enter 99 in both boxes.

Mother Pre-pregnancy Weight (pounds): Enter the mother's weight (in pounds) prior to the current pregnancy. If weight is unknown enter 999.

Mother Weight at Delivery (pounds): Enter the mother's weight (in pounds) at delivery but prior to the actual delivery. If weight is unknown enter 999.

Tobacco use during this pregnancy: Make a selection of *Yes*, *No*, or *Unknown* from the dropdown list. Selecting 'No' will disable the need to collect the remaining tobacco related items.



Cigarette smoking per day before and/or during pregnancy: These items capture the mother's use of tobacco (smoking) during the three months prior to the current pregnancy and during each of the 3-month trimesters of pregnancy.

Enter the approximate number of cigarettes smoked and select *Cigarettes* from the dropdown.

Once the Mother Health page is complete, select a navigation button at the bottom of the page:

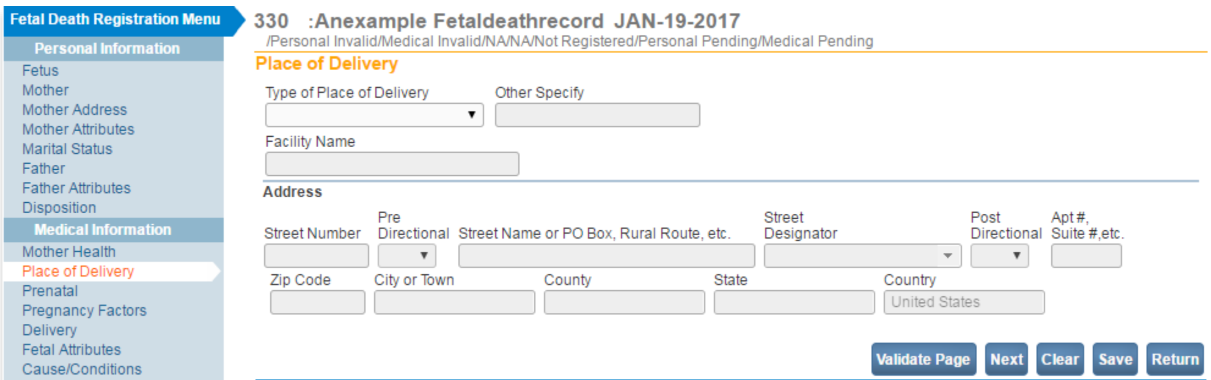
Selection of the Next button will save the data entered and proceed to the next page.

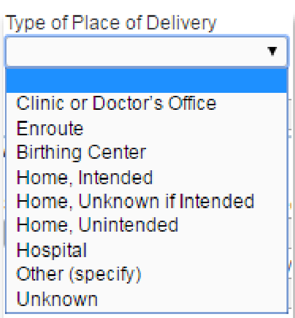
Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.6.2 Place of Delivery

The Place of Delivery **Items to Enter** capture data regarding where delivery occurred. This could be a hospital, home address or some other location.





Type of Place of Delivery: From the *Type of Place of Delivery* dropdown, select the type that best matches the location where delivery occurred.

If *Other (specify)* is chosen, enter the information on type of place of death into the *Other Specify* text box.

Facility Name:

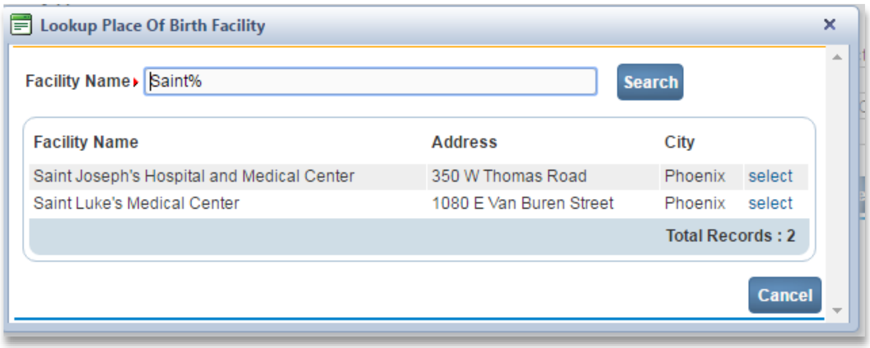
If *Home, (Intended, Unknown if Intended, or Unintended), is selected*, the *Address* fields for *Place of Delivery* will be auto-populated with the information entered on the *Mother Address* page. If no information has been entered on the *Mother Address* page, the address can be manually entered. For home deliveries, *Facility Name* is not required and will be disabled.

If *Other (specify)* is selected from the *Type of place of delivery* dropdown, the facility name (if known or applicable) and address fields can be manually entered. The facility name field can be left blank.

If Unknown is selected from the Type of place of delivery dropdown, the Facility Name and address Street Number, Pre/Post Directional, Street Name, Street Designator, Apt./Suite and Zip Code fields are not required and will be disabled. The City/Town, County, State and Country fields can be manually entered.

For all other *Type of Place of Delivery* dropdown selections made, the *Place of Delivery* can be entered manually or the LOV Lookup icon can be used to launch the *Lookup Place of Delivery* search tool.

Steps to Use the Place of Delivery Lookup



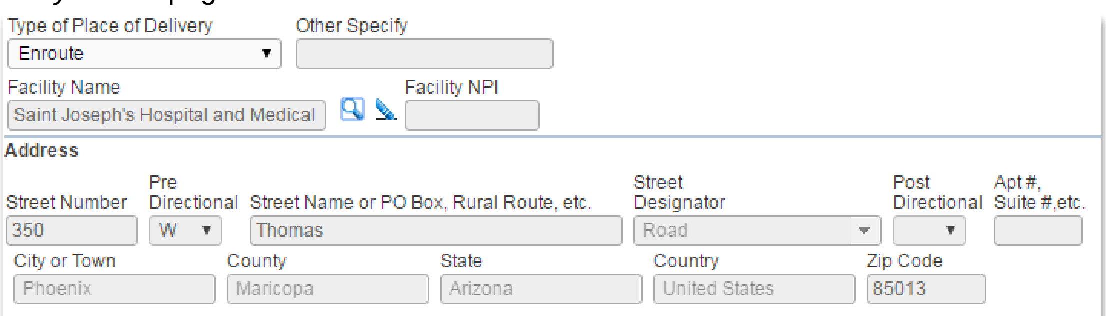
1. In the *Faclity Name* field, if known, enter the full name of the facility and choose *Search*.

If the full name of the facility is not known, **enter at least two letters followed by the %**, then **select search** to perform a wildcard search.

2. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

Facilities not listed in the LOV lookup tool can be entered by typing the *Facility Name* and address information manually. All out-of-state records will contain non-listed facilities.

Making a selection from the LOVE system-fills all of the corresponding fields for *Place of Delivery* on the page:



To clear the entry made for Place of Delivery, select the eraser icon.

The *Place of Delivery Lookup* filters results based on the selection made in the *Type of Place of Delivery* dropdown. For example, if method selected is *Inpatient, En Route* or *Hospital*, the lookup will filter the search to include hospitals; if *Birthing Center*, a list of birthing centers, etc.

If the user completing this section is logged in at a Medical Facility the *Place of Delivery* will be auto-filled with the facility name and address the user is logged in under. It can be changed if needed.

Once the *Place of Delivery* page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

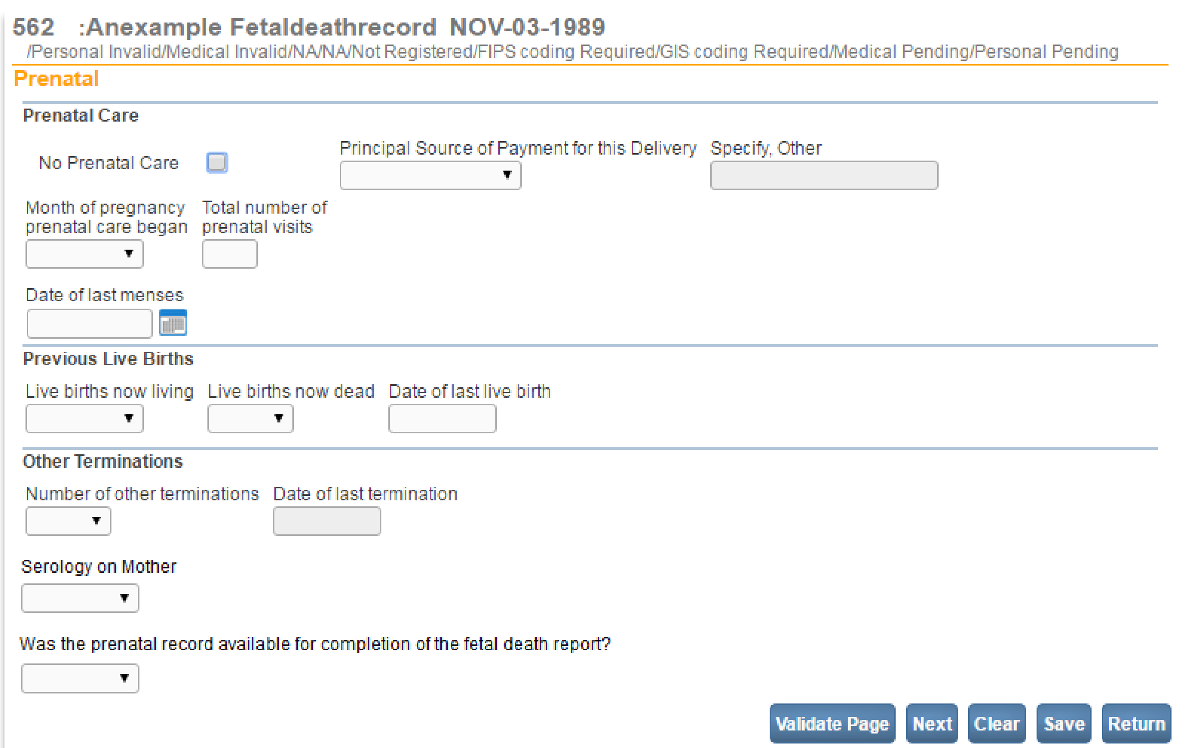
More information on record validation can be found in section *6 - Validation of Records*

5.6.3 Prenatal

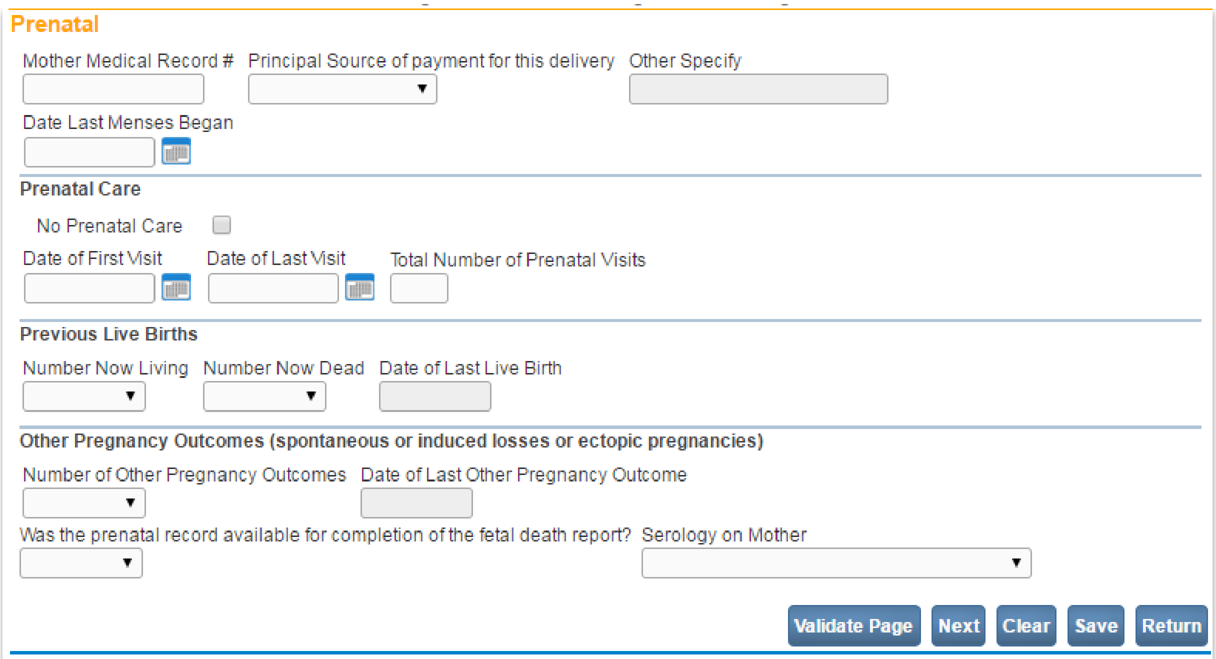
The Prenatal page **Items to Enter** collect information pertaining to type and frequency of prenatal care administered to the mother.

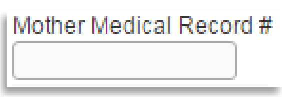
Format Change: The 2003 US Standard Certificate Revision included format changes for the collection of prenatal data. The DAVE™ application provides the prior version of the Prenatal page for those fetal deaths occurring before January 1, 2013 when Arizona adopted the revision.

Pre-2003 Prenatal page:



Post-2003 Prenatal page:



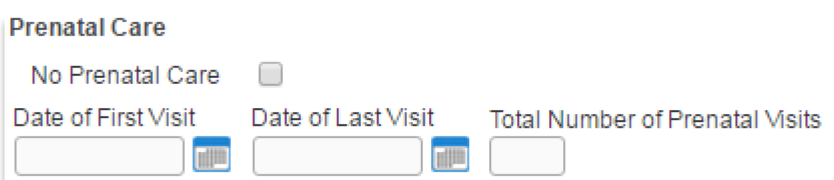


Mother Medical Record Number: If known, the Mother's Medical Record Number can be entered.

The Medical Record Number can be referenced later to Search for or Locate the case.

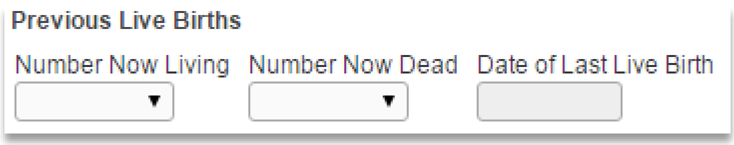
Date Last Menses Began: Enter the *Date Last Menses Began* manually or select the Calendar icon to launch the Interactive Calendar. If this date is unknown enter 99-99-9999. If the month and year are known but the exact day is not enter 99 for the day but enter the month and year correctly. For example: 01-99-2016.

In the *Prenatal Care* section, if the mother did not receive any prenatal care, select the **No Prenatal Care** checkbox. If the mother did receive prenatal care, complete this prenatal information by entering the **Date of First Visit, Date of Last Visit,** and the **Total Number of Prenatal Visits.**



If either date is unknown enter 99-99-9999. For either date, if the month and year are known but the exact day is not enter 99 for the day but enter the month and year correctly. For example: 01-99-2016.

In the *Previous Live Births* section, make a selection from the dropdowns for **Number Now Living** and **Number Now Dead**

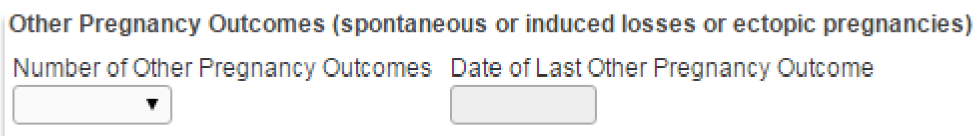


Date Last Live Birth: Manually enter the month and year only for the *Date of Last Live Birth*.

If this is the mother's first delivery, select '*None'* from both the *Number Now Living* and *Number Now Dead* dropdown list list. Selecting none from both lists disables the *Date of Last Live Birth* control as it is not required in this instance.

If the *Number Now Living* and/or *Number Now Dead* are unknown, select '*Unknown'* from the dropdowns. Doing so will auto-populate the *Date of Last Live Birth* with 99/9999 and disable the control.

The *Other Pregnancy Outcomes (Spontaneous or Induced Terminations or Ectopic Pregnancies)* section is used to collect information regarding previous pregnancies that did not result in a live birth.



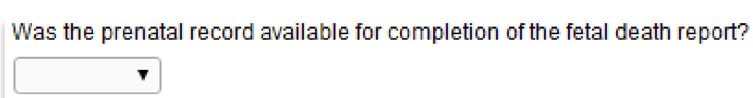
Make a selection from the **Number of Other Pregnancy Outcomes** dropdown.

In the **Date of Last Other Pregnancy Outcome** field, enter the month and date that the last pregnancy terminated.

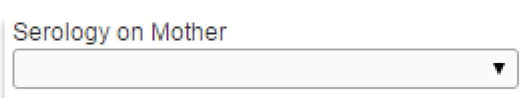
If this is the mother's first pregnancy, select '*None*' from the Number of Other Pregnancy Outcomes dropdown. Doing so disables the *Date of Last Other Pregnancy Outcome* control as it is not required in this instance.

If the *Number of Other Pregnancy Outcomes* is unknown, select '*Unknown'* from the dropdown. Doing so will auto-populate the *Date of Other Pregnancy Outcome* with 99/9999 and disable the field.

Make a selection of *Yes, No*, or *Unknown* from the **Was the prenatal record available for completion of the fetal deah report?** dropdown.



Make a selection from **Serology on Mother**.



Once the *Prenatal* page is complete, select a navigation button at the bottom of the page:

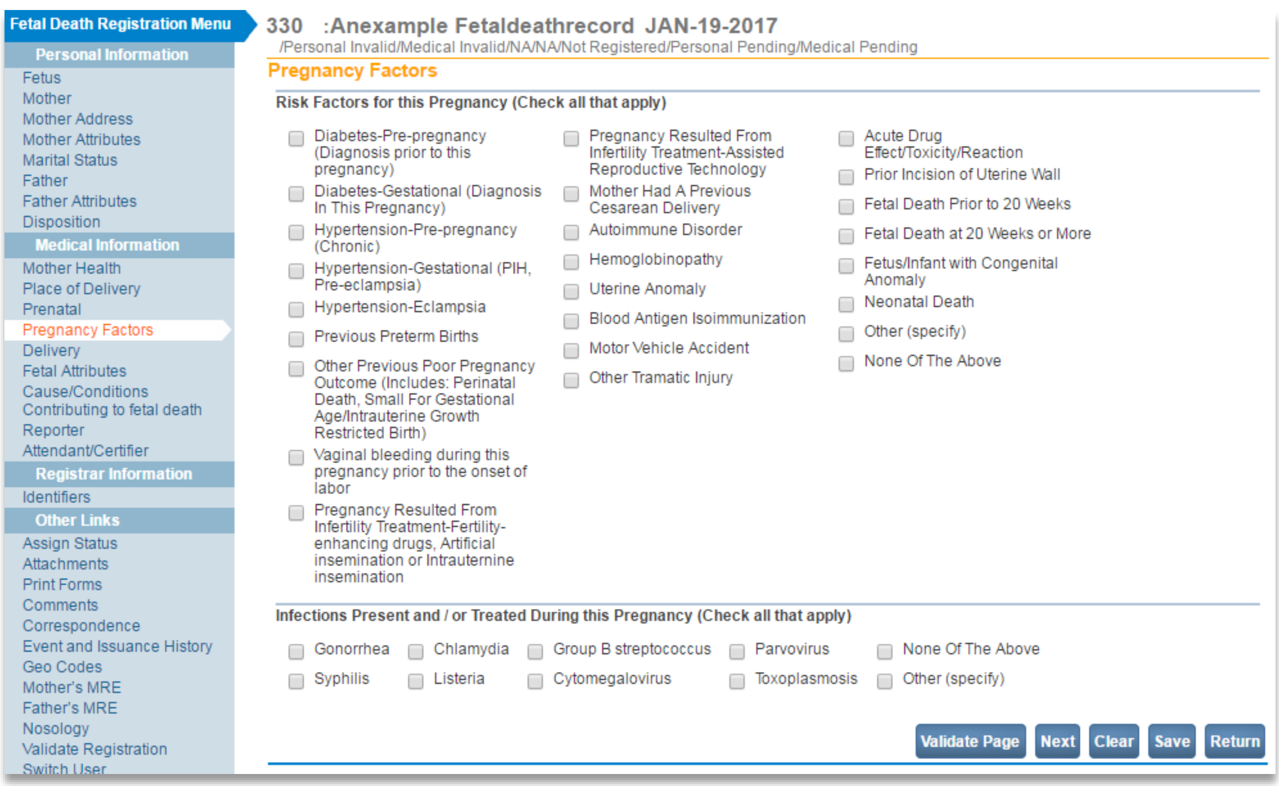
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.6.4 Pregnancy Factors

The Pregnancy Factors page **Items to Enter** collect information related to conditions suffered or experienced by the mother which may have resulted in complications during labor, or created health implications for the mother and/or fetus.



Risk Factors for this Pregnancy and **Infections Present and/or Treated During this Pregnancy** allow for multiple selections, meaning that the user can select one or as many of the conditions that apply. Select the *None Of The Above* if none of the conditions apply. Select *Other (specify)* if a condition applies but is not available to select.

At least one selection must be made within each section.

Once the *Pregnancy Factors* page is complete, select a navigation button at the bottom of the page:

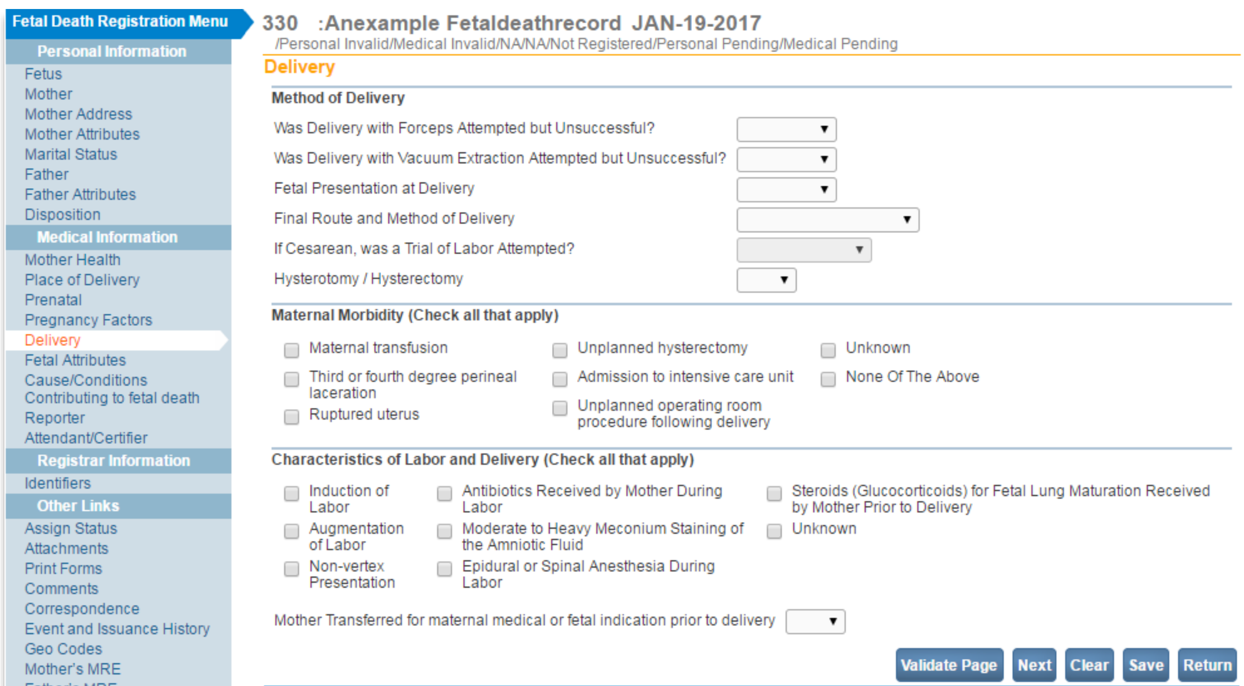
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.6.5 Delivery

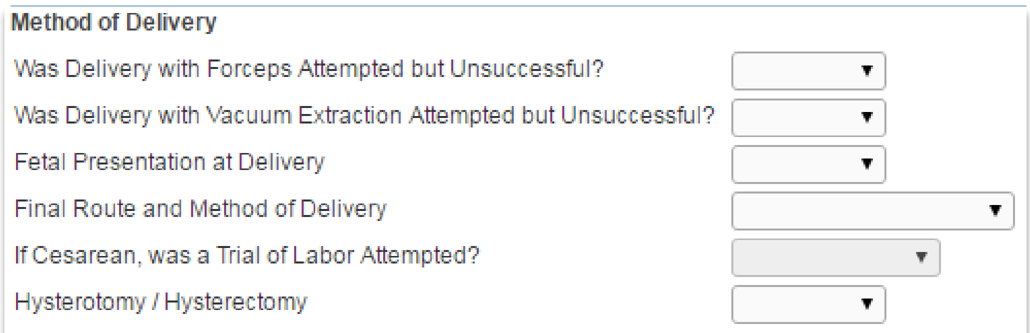
The Delivery page **Items to Enter** record the procedures used and conditions present during the delivery process.



The *Method of Delivery* section is used to describe how the fetus was delivered. On this page the user will make selections from the available dropdowns for the following items:

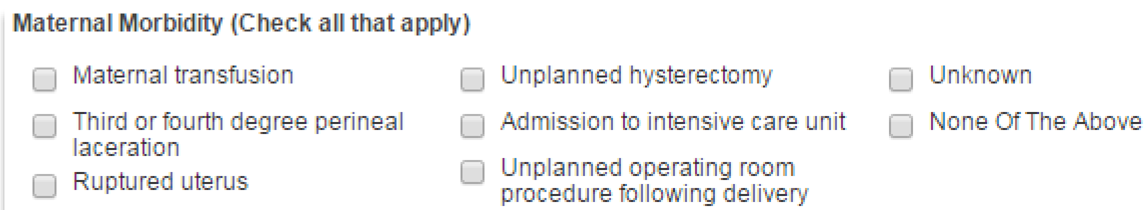
- **Was Delivery with Forceps Attempted but Unsuccessful?**
- **Was Delivery with Vacuum Extraction Attempted but Unsuccessful?**
- **Fetal Presentation at Delivery**

- **Final Route and Method of Delivery**
- **Hysterotomy/Hysterectomy**



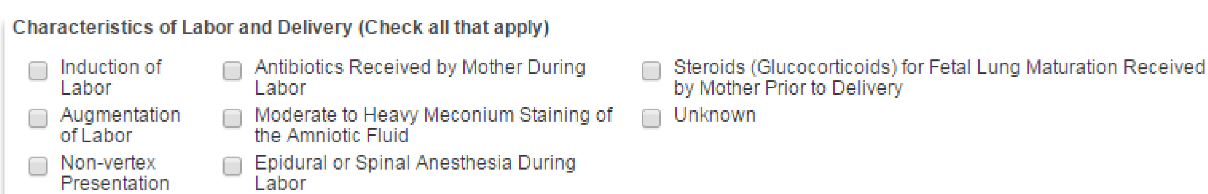
If Cesarean, was a Trial of Labor Attempted? will only be enabled if *Cesarean* was selected from the *Final Route and Method of Delivery* dropdown above.

The **Maternal Morbidity** section collects information on any serious complications experienced by the mother associated with labor and delivery. Multiple selections are allowed. Select *None of the Above* if none of the conditions were experienced by the mother during delivery.



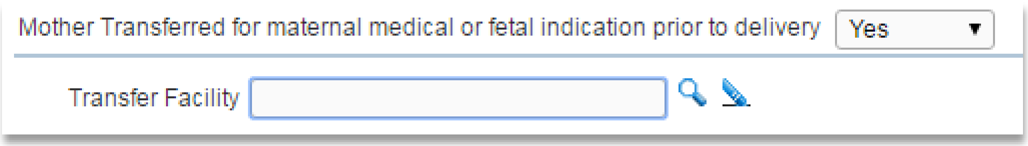
At least one selection must be made within the Maternal Morbidity section.

The **Characteristics of Labor and Delivery** section collects information in regards to labor and delivery. Multiple selections are allowed.



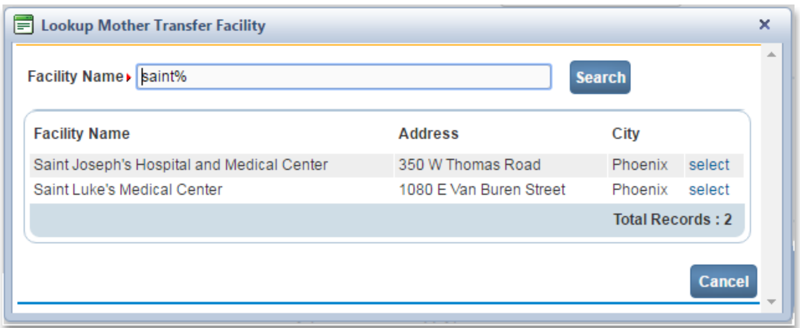
A selection of Yes, No, or Unknown must be made from the **Mother Transferred for maternal medical or fetal indication prior to delivery** dropdown at the bottom of the page.

Selecting *Yes* from the dropdown will display a new section where the **Transfer Facility** information is entered.



The *Transfer Facility* may be entered manually or the LOV Lookup icon may be used to launch the *Lookup Mother Transfer Facility* search tool.

Steps to Use the Mother Transfer Facility Lookup



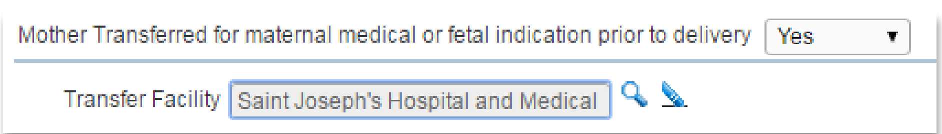
1. In the *Faclity Name* field, if known, enter the full name of the facility and choose *Search*.

   If the full name of the facility is not known, **enter at least two letters followed by the %**, then **select search** to perform a wildcard search.

2. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

Facilities not listed in the LOV lookup tool can be entered by typing the *Facility Name* information manually.

The selection system-fills the facility name for *Transfer Facility* on the page.



To erase the entry made for Place of Delivery choose the eraser icon .

Once the *Delivery* page is complete, select a navigation button at the bottom of the page:

Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.6.6 Fetal Attributes

The Fetal Attributes page **Items to Enter** are used to record information relative to the fetus at time of delivery.

Weight of Fetus: Enter the fetus weight in Grams.

Obstetric Estimate of Gestation (weeks): Enter the obstetric estimated gestation of the fetus in weeks.

Plurality: Select the plurality for this delivery. If only one delivery occurred select *Single*. For multiple deliveries select the corresponding plurality.

Delivery Order: If *Plurality* is *Single* then Delivery Order will be disabled. For multiple deliveries select the delivery order of this fetus from the dropdown.

The **Congenital Anomalies** selections are used to gather information related to any abnormal conditions (congenital anomalies) of the fetus. Multiple selections can be made. If none of the conditions apply, select "*None of the anomalies listed above*."

Once the *Fetal Attributes* page is complete, select a navigation button at the bottom of the page:

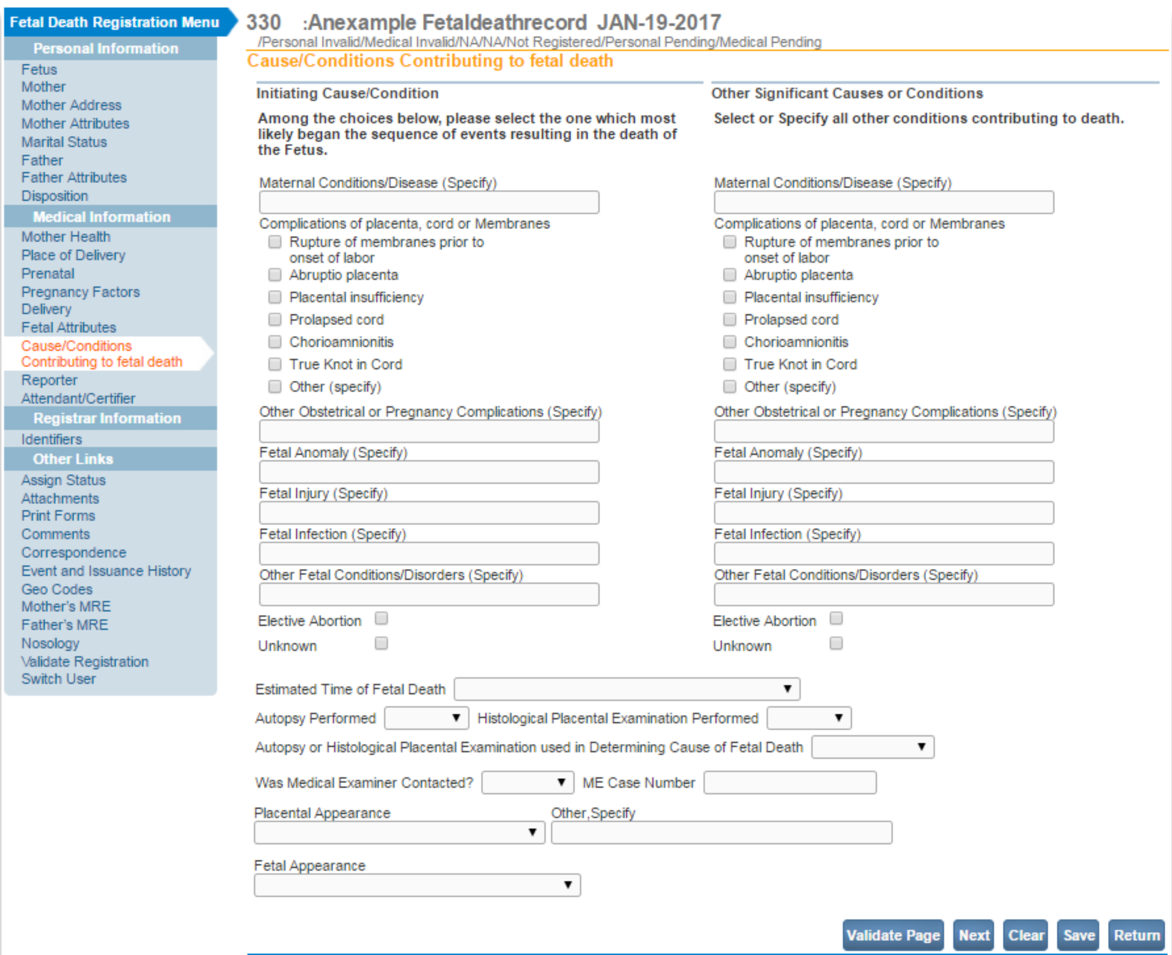
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

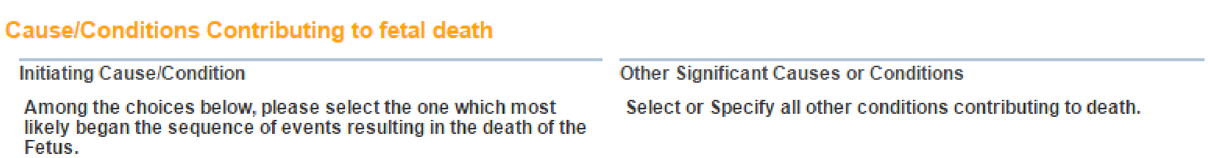
More information on record validation can be found in section *6 - Validation of Records*

5.6.7 Cause/Conditions Contributing to Fetal Death

The Cause/Conditions Contributing to fetal death page **Items to Enter** record initiating and contributing causes and conditions that lead to fetal death.



The **Cause/Conditions Contributing to fetal death** page is separated into two sections:

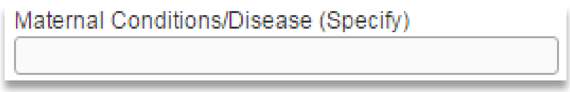


1. **Initiating Cause/Condition**: Is for reporting a single condition that most likely began the sequence of events that resulted in the death of the fetus.

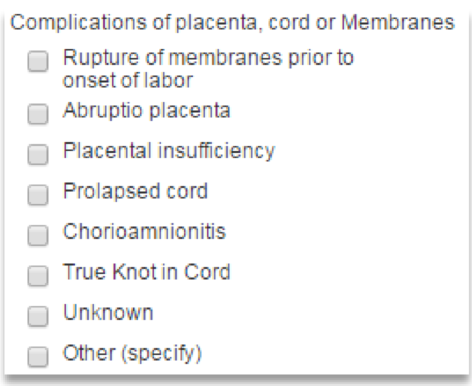
2. **Other Signification Causes or Conditions**: Is for reporting all other conditions which resulted in the death of fetus. Whereas only a single initiating cause or condition may be entered, multiple other causes or conditions may be selected.

Regardless of which section is being completed, causes or conditions within each control are entered in the same manner.

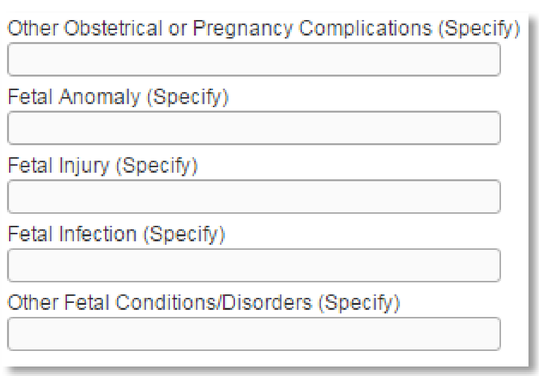
If the cause of fetal death was due to a condition or disease of the mother, enter this information in the *Maternal Conditions/Disease (Specify)* text field.



If the cause is related to *Complications with the placenta, cord, or Membranes*, make a selection from the checkboxes provided. If none of the checkboxes are applicable, select the *Other (specify)* checkbox to manually enter the cause/condition.



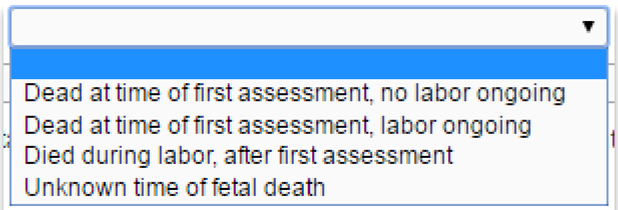
The remaining cause items allow for manual entry of information regarding *Obstetric or Pregnancy Complications* as well as any *Fetal Anomalies, Injuries, Infections or Other Conditions/Disorders* that caused fetal death.



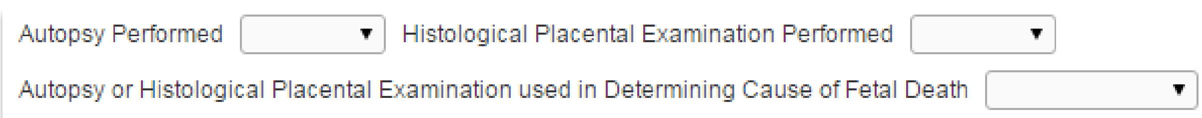
In some cases the cause or conditions that contributed to the death of the fetus may not be known. In these instances select the *Unknown* checkbox.

In some instances the mother may have opted for an elective abortion. In these instances select the *Elective Abortion* checkbox.

Estimated Time of Fetal Death: Make a selection from the dropdown.



The preceding dropdowns indicate whether or not an autopsy and/or histological placental examination were performed and used in determining the cause of the fetal death. Make selections from all three dropdowns.



If "No" is selected from both the **Autopsy Performed** and **Histological Placental Examination Performed** dropdowns, the **Autopsy or Histological Placental Examination used in Determining Cause of Fetal Death** dropdown will default to "Not Applicable" and be disabled.

The remaining dropdowns record placental and fetal appearance as well as information on whether the Medical Examiner was contacted in regards to the fetal death.

Make a selection from each of dropdown. If an ME Case number has been assigned to the record, enter it here.

Once the *Cause/Conditions Contributing to fetal death* page is complete, select a navigation button at the bottom of the page:

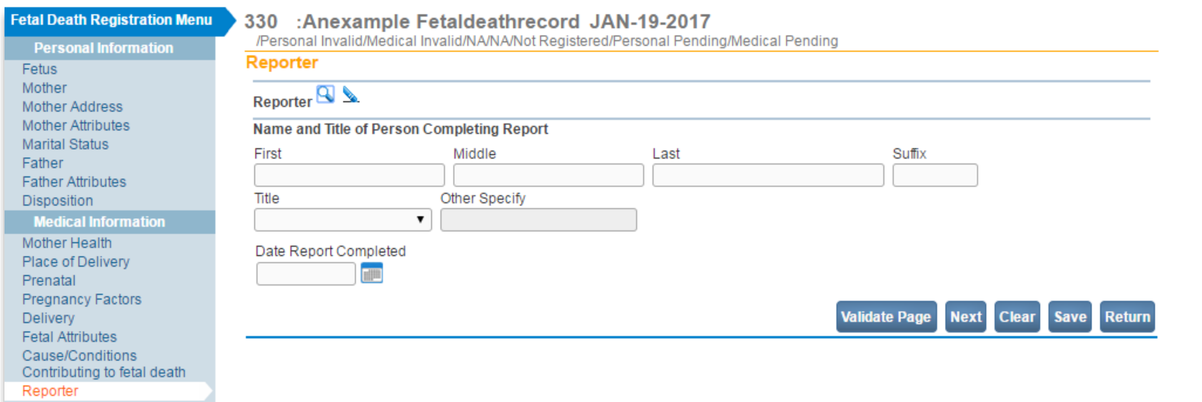
Selection of the Next button will save the data entered and proceed to the next page.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.6.8 Reporter

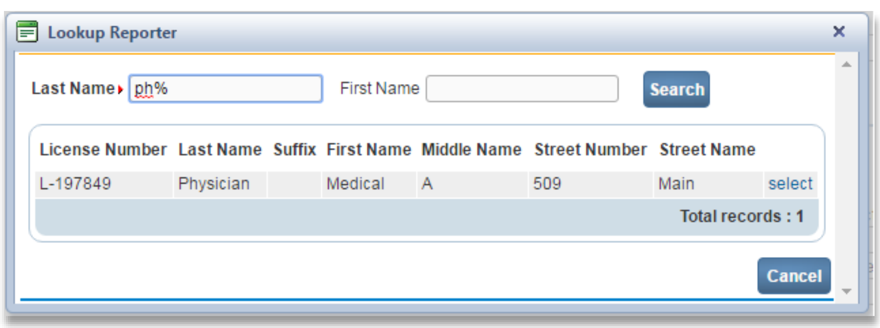
The Reporter **Items to Enter** capture information regarding the person who completed the fetal death report.



The name of the person completing the report can be manually entered or the standard LOV lookup tool can be used to search for the reporter.

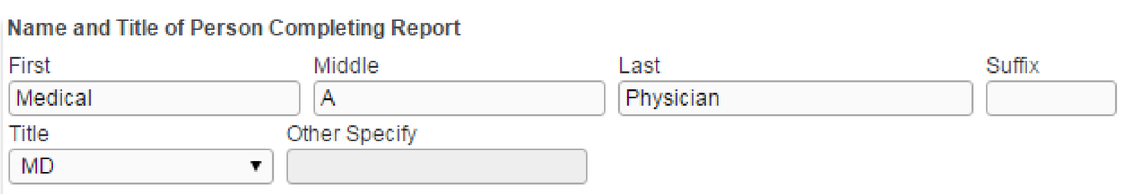
Steps for using the Standard LOV Lookup to complete

1. Select the *LOV* lookup tool to search for the reporter. Enter in the *Last* and *First Name* of the reporter; if known. If unknown, a wildcard search can be performed by entering at least two characters in the *Last* name field followed by %.



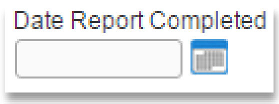
2. From the Search Results List select the *Select* link next to the correct Certifier.

The system will then auto-populate the *Certifier* name and the associated *Certifier Address* information.



Date Report Completed: Manually enter the date the report was completed or select the calendar icon to launch the interactive calendar.

If the user completing this section is logged in at a Medical Facility the *Reporter page* will be auto-filled with the name of the user logged in and the *Date Report Completed* will be auto-filled with the date the user affirms the report.



Once the *Reporter* page is complete, the *Personal Information* section of the fetal death record is also complete. Select a navigation button at the bottom of the page:

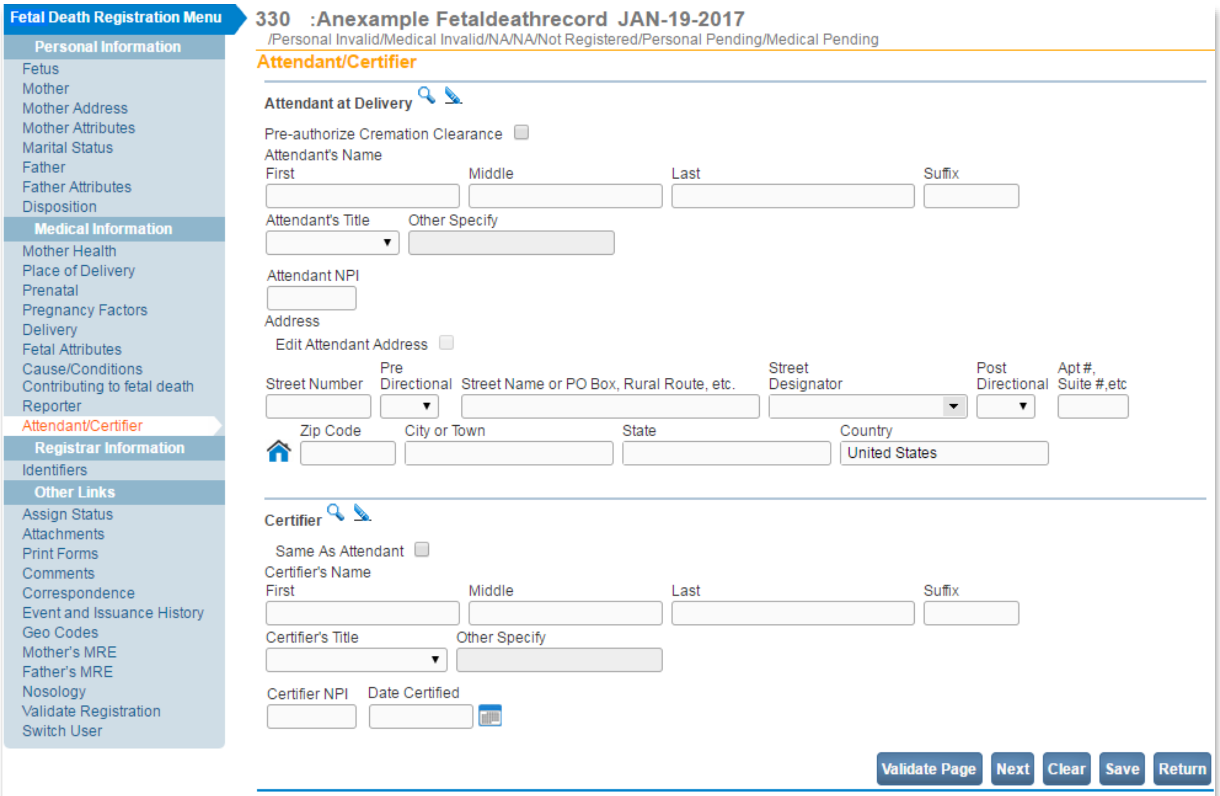
Selection of the *Next* button will save the data entered and proceed to the next page. In this case the next page is also the first page in the *Medical Information* section, *Prenatal*.

Other options include selection of the Validate Page button to check the page for errors, the Clear button to clear all entries since the last save, the Save button to save changes without leaving the page, or the Return button to return to the previous

More information on record validation can be found in section *6 - Validation of Records*

5.6.9 Attendant/Certifier

The Attendant/Certifier page **Items to Enter** capture information relevant to the person or persons attending and/or certifying the delivery.



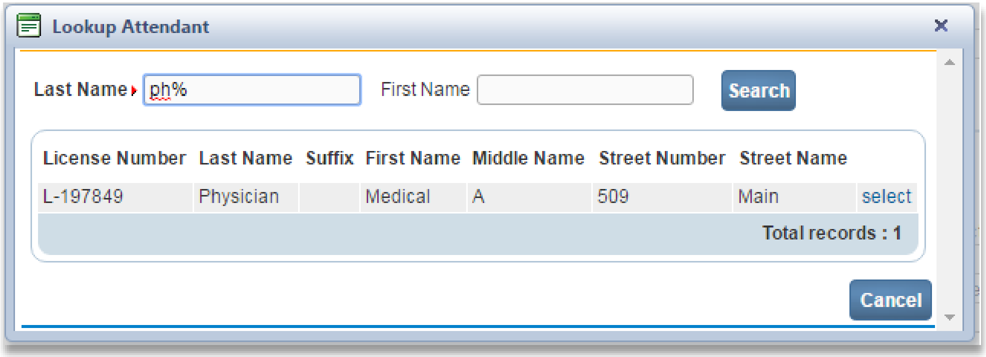
Pre-authorize Cremation Clearance: This checkbox is only available to Medical Examiner's whom have intiated entry of the fetal death record. Selection of this checkbox allows the Medical Exminer to pre-authorize cremation clearance if the method of disposition is selected as cremation.

Attendant at Delivery: May be completed manually or the *LOV* lookup tool can be used to search for and select the attendant.

Steps for using the Attendant Lookup LOV Lookup to complete

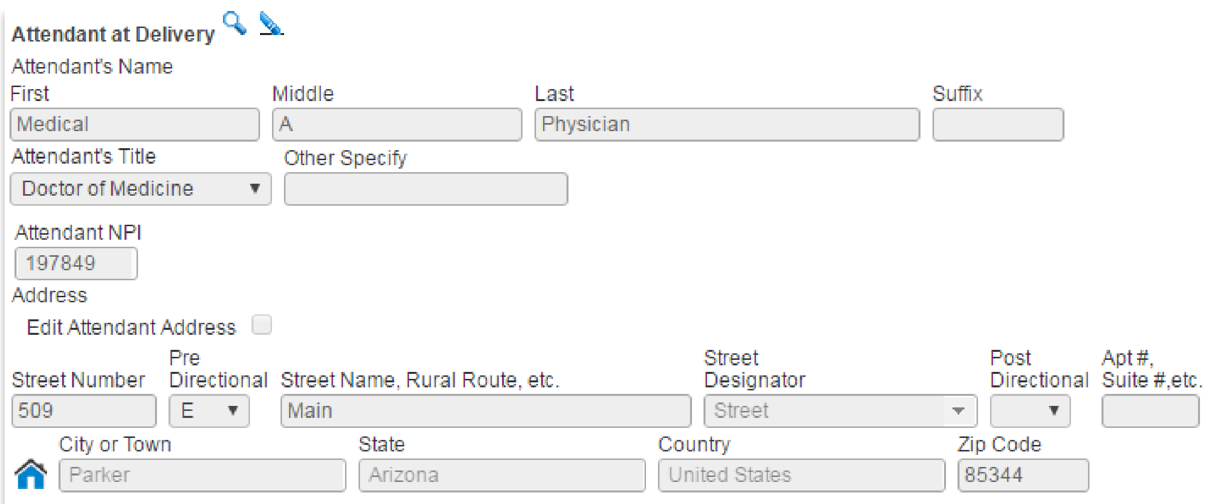
1. Select the *LOV* lookup tool to search for a certifier.

2. Enter the *Last* and *First Name* of the attendant; if known. If not known a wildcard search may be performed by entering at least two characters in the *Last* name field followed by %.



From the *Search Results List, s*elect the link next to the correct Attendant.

3. The system will then system fill the *Attendant* name and the associated *Attendant Address* information.



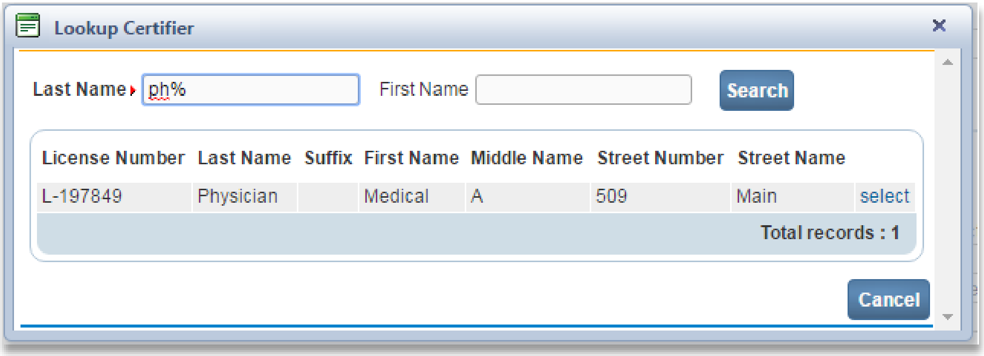
The *Attendant at Delivery* is the individual physically present and responsible for the delivery.

Otherwise, the *Certifier* information may be completed manually or the *LOV* lookup tool can be used to search for and select the certifier.

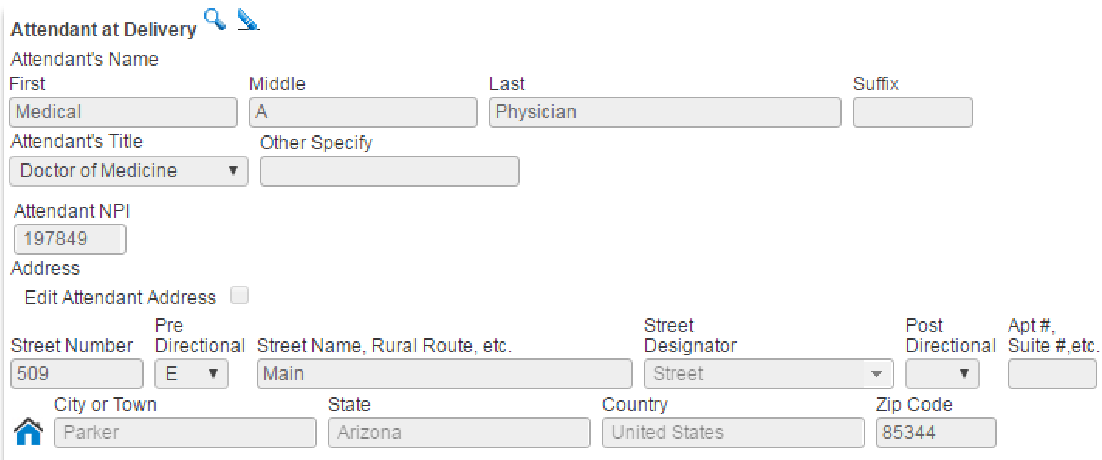
Steps for using the Certifier Lookup LOV Lookup to complete

1. Select the *LOV* lookup tool to search for a certifier.

2. Enter in the *Last* and *First Name* of the certifier; if known. If not known a wildcard search can be performed by entering at least two characters in the *Last* name field followed by %.



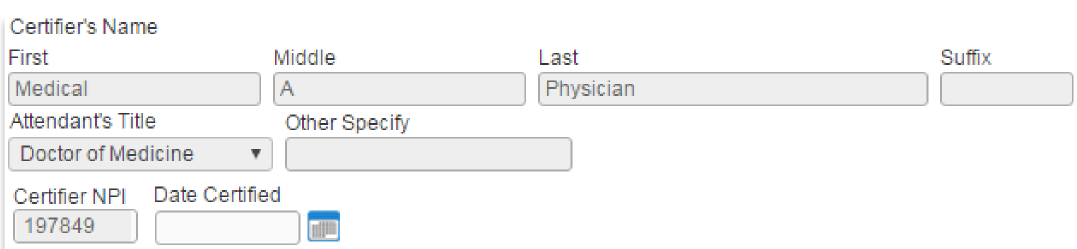
3. From the *Search Results List* Select the link next to the correct attendant. The system will then auto-populate the *Attendant* name and the associated *Attendant Address* information.



The *Attendant at Delivery* is the individual physically present and responsible for the delivery.

Certifier: If the Certifier is the same person who attended and is responsible for the delivery, select the Same as Attendant checkbox.

Otherwise, the *Certifier* information may be completed manually or by using the *LOV* lookup tool to search for and select the certifier.



Date Certified: Enter the date the record was certified manually, or select the calendar icon to launch the interactive calendar.

If the user completing this section is logged in at a Medical Facility the *Certifier* information will be system-filled with the name of the user logged in and the *Date Certified* will be system-filled case is certified.

Once the *Certifier* page is complete, the *Medical Information* section of the death record is also complete. Select a navigation button at the bottom of the page:

The *Next* button is no longer available as this is the final mandatory page to complete within the Death Registraton menu.

Options for selection are the *Validate Page* button to check the page for errors, the *Clear* button to clear all entries, the *Save* button to save changes without leaving the page, or the *Return* button to return to the previous page.

More information on record validation can be found in section *6 - Validation of Records*

5.6.10 Certify the Fetal Death Record

At this point in the process the *Medical Information* has been completed and the Medical user responsible for entering this information will need to *Certify* the record.

If the record is being entered at the State or a County Vital Records Office, affirmation is not required and the steps for this process can be skipped.

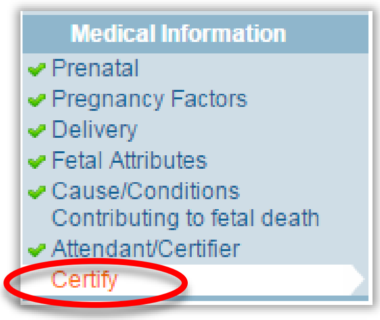
If both the Personal and Medical Information are being entered by a medical facility user, completion of this particular certification step is not required.

Upon successful validation of both the *Personal* and *Medical Information,* the *Affirm/Certify* link will be made available allowing the medical facility user to *Affirm* the *Personal Information* while simultaneously *Certifying* the *Medical Information*.

The user affirming the record will select the *Validate Page* button or *Validate Registration* link to check the record for errors and/or omissions.

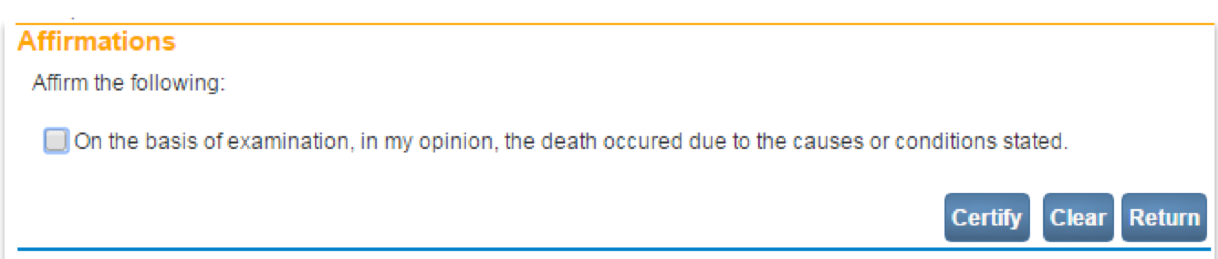
More information on record validation can be found in section *6 - Validation of Records*

Once the record has passed all validation rules, an *Affirm* link will appear at the bottom of the Personal Information submenu.

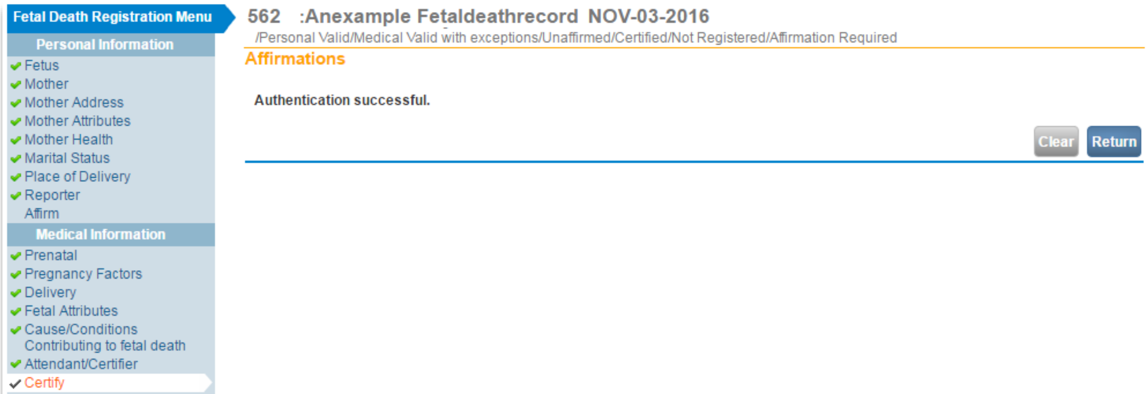


Steps to Certify the Medical Information

1. Select the *Certify* link
2. Select the checkbox next to the listed affirmation(s) and then select *Certify*.



3. An Authentication successful message will be displayed and a checkmark placed next to the *Certify* link indicating that the Personal Information has been affirmed.

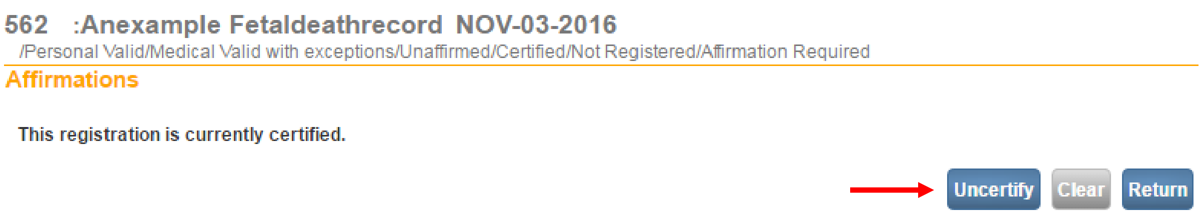


Once the record is signed the pages within the *Medical Information* sub-menu are locked and cannot be edited.

If the record is not yet registered and updates need to be made to any of the items in the Medical Information section, the record must first be uncertifed. Doing so unlocks the pages within the Medical Information sub-menu so they can once again be edited.

Steps to Uncertify the Medical Information

1. To uncertify the registration, select the *Certify* link.



2. Select *Uncertify*.

3. Select *OK* to confirm the reversal.

Once uncertified, the pages are again available for editing.

5.6.11 Affirm & Certify the Fetal Death Record

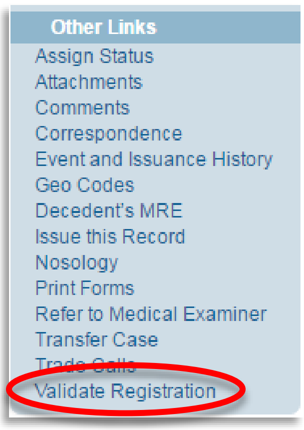
At this point in the process the *Personal* and *Medical Information* has been completed and the Medical user responsible for entering this information will need to *Affirm* and *Certify* the record.

> If the record is being entered at the State or a County Vital Records Office, affirmation and certification are not required and the steps for these processes may be skipped.

The combination *Affirm/Certify* link should be used for those medical facility users responsible for entering all of the *Personal* and *Medical Information* for a Fetal Death Record.

Once both Personal and Medical Information is complete and all validation rules have passed an *Affirm/Certify* link will be made available allowing the medical facility user to *Affirm* the *Personal Information* at the same time as *Certifying* the *Medical Information*.

The user affirming and certifying the record should select the *Validate Page* button or *Validate Registration* link to run the validation edit rules for the record.



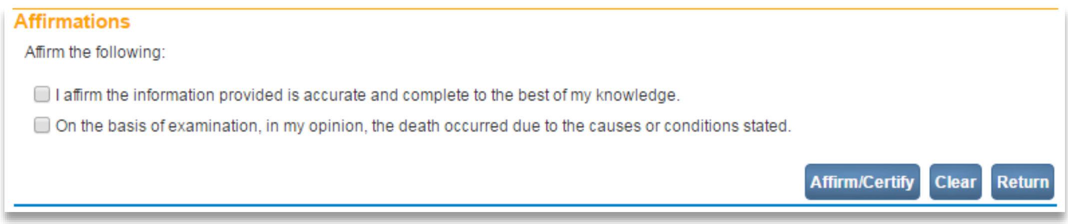
More information on record validation can be found in section *6 - Validation of Records*

Once the record has passed all validation edit rules, an *Affirm/Certify* link will appear at the bottom of the *Medical Information* submenu.

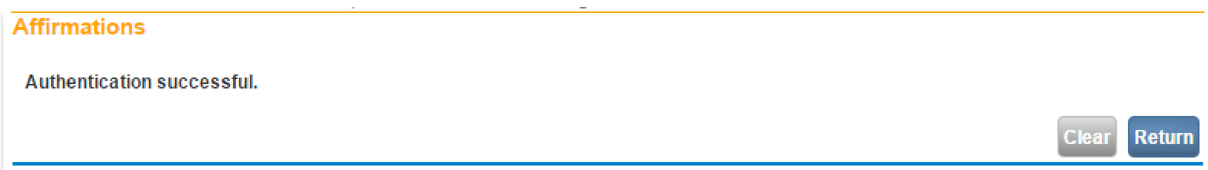
Steps to Affirm and Certify the Medical Information

1. Choose the *Affirm/Certify* link

2. Select the checkbox next to the listed affirmations and then select *Affirm*.



3. An Authentication successful message will be displayed and a checkmark placed next to the Affirm/*Certify* link indicating the Personal Information has been affirmed.



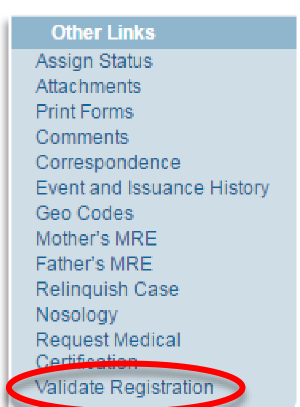
Once the record is affirmed and certified the fetal death record will receive a "Registered" status.

If updates need to be made to any of the items in the Personal or Medical Information section, an Amendment will need to be submitted. See section 8.1 Amendments for the steps to submit an Amendment.

6. Validation of Records

6.1 Record Validation

A death or fetal death record may only be submitted for registration after the Personal and Medical Information has been completed and validated.



DAVE™ provides two ways in which to validate the Personal and Medical information that has been entered:

During completion of the Personal or Medical Information pages the user may select the *Validate Page* button found at the bottom of each registration page.

The user may also select the *Validate Registration* link from within the Other Links submenu of the Death or Fetal Death registration menu.

Regardless of the validation method selected, the exact same validation processes are used to check the registration for errors and/or omissions.

A system of edit rule validations compare all Personal and Medical information pages in the process. This is done to ensure that all items within these pages are completed accurately, verifies that mandatory fields have been not been left blank and that valid values have been entered based on the type of entry required for each field, and checks the respective NCHS specifications affecting each field.

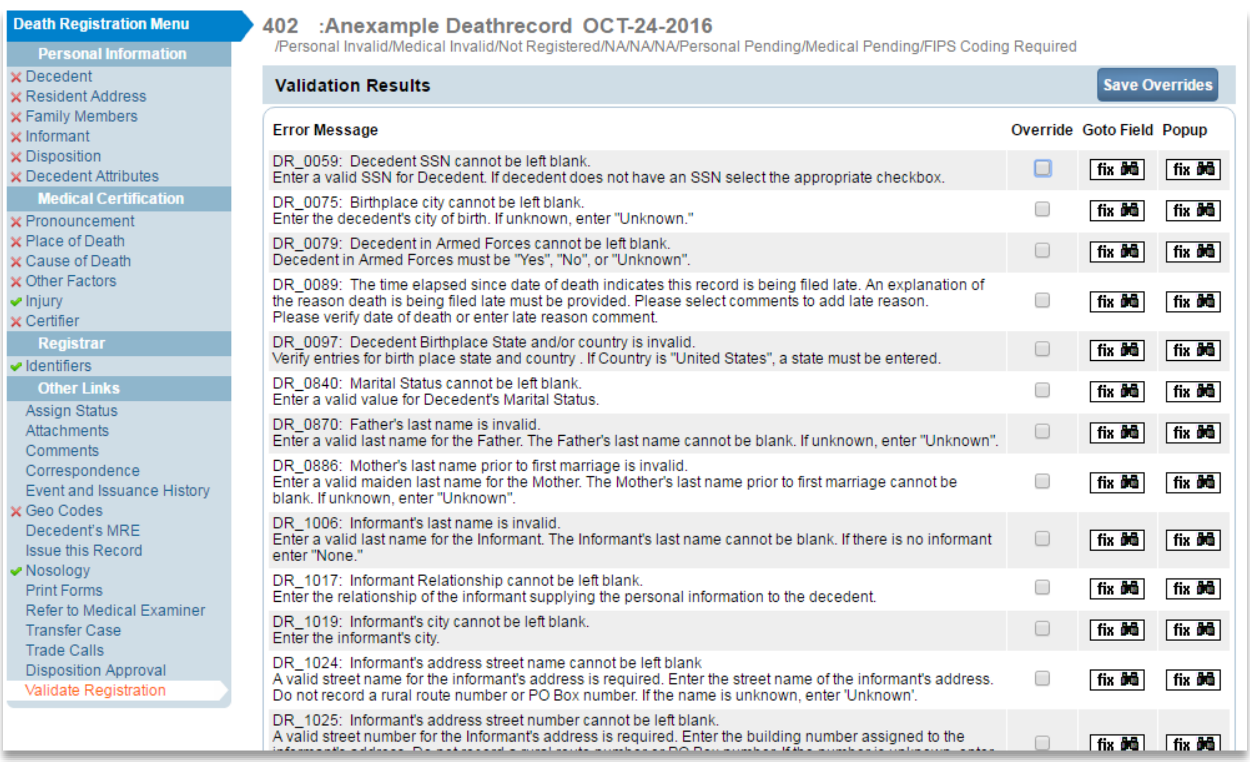
The validation process is intended to show the user any outstanding issues with entries they have made and allow them to make corrections. In some cases corrections are not needed and the user will instead follow a process to affirmatively submit the items as they were entered.

6.1.1 Viewing Validation Edits

Once the Record Validation process has occurred there are two ways to review edit rules failures:

Validate Registration Page

If the user selected the *Validate Registration* link from within the *Other Links* submenu they will be taken to the Validation Results Page.

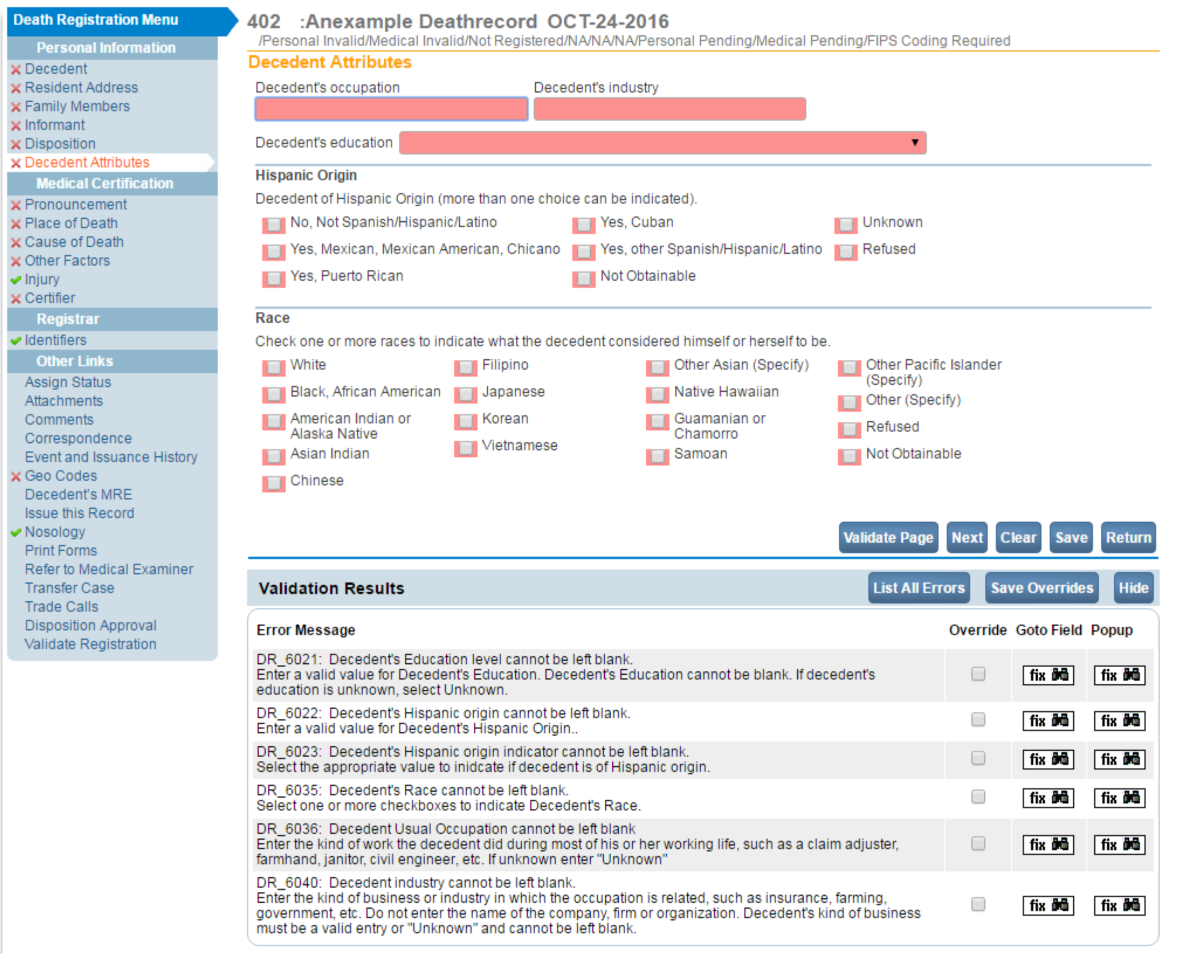


The Validation Results page provides a list of all validation edit rules that have been triggered on the record and that need to be reviewed, corrected, and overridden.

In this example nothing has yet been entered into any of the pages except the items needed to start the record. This is why there so many errors being displayed within the Validate Registration page. Typically the Record Validation will not be run until the Personal or Medical sections have been completed.

Validatation Results Table

If the user selected the Validate Page link, from within one of the Personal or Medical Information pages, then a Validatation Results grid will be displayed at the bottom of the page itself.



Again, regardless of the Record Validation type selected, the process to validate the record is the same. However, access to the Validate Registration link is based on user security setup.

6.1.2 Correcting Validation Edit Checks

From the list of failed edit rules, either on the Validate Registration page or the Validation Results table within a specific page, the following options are available for correction of validation errors.

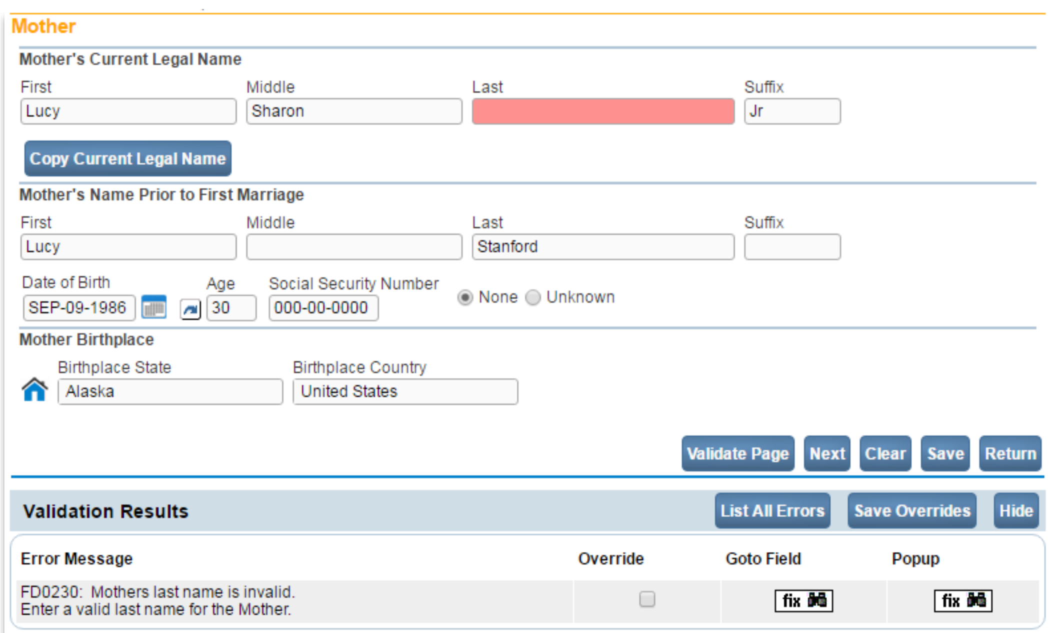
6.1.2.1 Manually Selecting

Upon validation, the individual pages within the Registration Menu are given a color coded symbol to identify those with pages with edit rule failures to review, the types of edit rules that failed, and any pages that passed all edit rule validations.

In this example the following pages:

- **Passed all edit rules**: Fetus, Mother Address, Mother Attributes, Marital Status, and Place of Delivery
- **Have soft edits triggered**: Mother Health, Reporter
- **Have hard edits triggered**: Mother

The user may then select a page to review from the Registration Menu. Once selected, the page will display and highlight the field that contains errors. The Validation Results table, found at the bottom of the page, provides information on what the edit rules that failed and how they may be corrected.

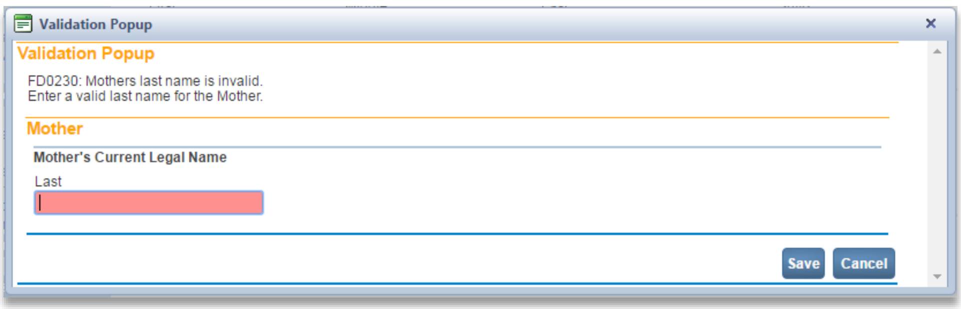


6.1.2.2 Goto Field Option

From either the Validate Registration page or the individual Validation Results table, select the fix icon in the *Goto Field* column. The DAVE™ page containing the error will be displayed place and the cursor placed in the field requiring correction. This option is very useful if corrections are being made to a single registration page with multiple edit rules to correct.

6.1.2.3 Validation Popup Option

To use this method of error correction, select the fix button in the Popup column. DAVE™ will then provide a Validation Pop-up which displays the validation error message and the field or fields in need of correction.



This Popup window functionality is especially useful when trying to resolve validation errors that include conflicting entries across multiple pages. Rather than requiring the user to search across many pages, the Validation Popup presents all of the conflicting fields in a single window.

Once all listed errors have been corrected, select the *Validate Registration or Validate Page* link once again to verify that no errors remain.

6.1.3 Override Validation Edit Checks

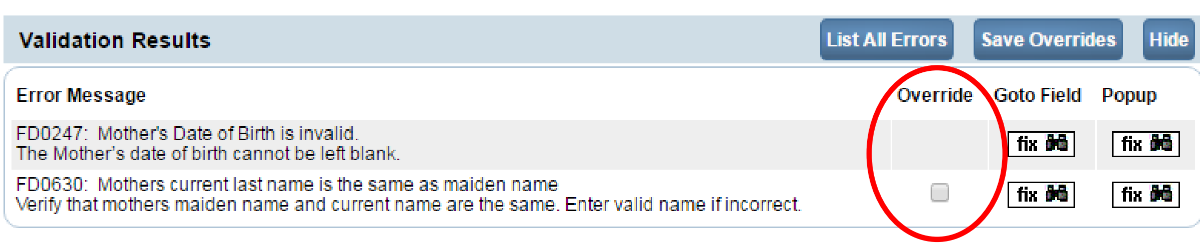
The edit rule validation process produces two types of validation failures to review:

Hard Edit Errors - These errors are triggered for item entries that must be corrected before the record can be submitted for registration.

Fields containing hard edit rule failures are highlighted in red. Note that the *Validation Results* table will not provide an option for overriding or bypassing hard edit rule failures.

Soft Edit Errors - These errors are triggered for item entries that may be submitted 'as is' for registration but must first be overridden.

Fields contaning soft edit rule failures are highlighted in yellow. Note that the *Validation Results* table provides a mechanism that allows users to *Override* soft edit rule failures.



To override a soft edit rule failure, place a checkmark (☑) in the checkbox next to the field in question and select the *Save Overrides* button.

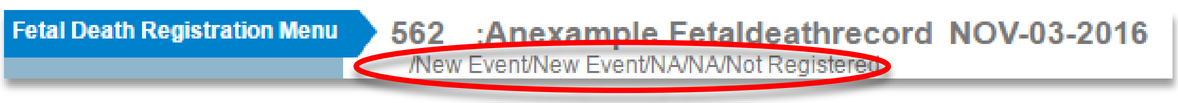
The Override process allows the user to submit the record for registration even though errors may be present. State and/or local registrars will know that the user did review the error and that the data entered was considered accurate.

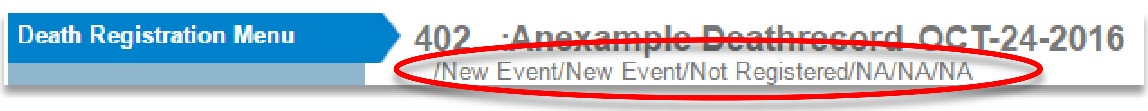
6.2 Record Status

Record Validation also serves to apply statuses to the record. The record status is used to track progress of the record within the registration process. The statuses applied to the record are also used to place records in Registration Work Queues enabling users to keep track of the records they are working on.

More information on Work Queues can be found in section *10 - Queues*

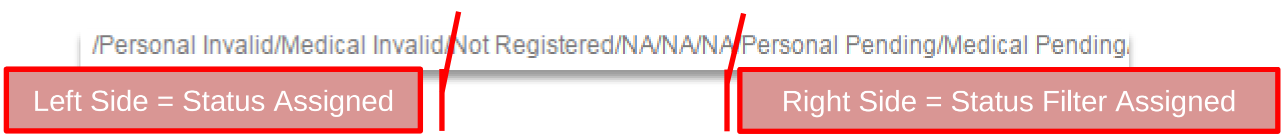
While working within a Death or Fetal Death registration the Record Status is easily viewed within the *Status Bar* located at the top of the page, just under the identifying information.





When a Death or Fetal Death record is initiated it receives the Status of 'New Event.' As the record progresses through the registration process, the Record Status will update accordingly.

Upon initial Record Validation, if any errors are found within the personal or medical information pages the New Event status will update to Personal or Medical Invalid.



'Invalid status' applies a filter of Personal and/or Medical Pending to the Record. This means the user can now find this record within their Peronal or Medical Pending Registration Work Queue.

Registration Work Queue Summary

Queue Name	Type ↓	Count	Age of Oldest in Days
Personal Pending	Death	3	8
Medical Pending	Death	4	9
			Total Queues : 2

The table below provides information on Record Statuses assigned, status filers assigned (if any), and the filter name.

Record Status Assigned	Staus Filter Assigned?	Status Filter (Work Queue) Assigned
New Event	No	
Personal Invalid	Yes	Personal Pending
Medical Invalid	Yes	Medical Pending
Personal Validw/Exceptions	No	
Medical Validw/Exceptions	No	
Unsigned	Yes	Signature Required
Uncertified	Yes	Certification Required
Unaffirmed	Yes	Affirmation Pending

Record Validation may also cause Status Filters (Works Queues) to be assigned without a corresponding Record Status. A few examples of this are Rare Cause of Death, ME Review Required, and Cause of Death Pending. For more information on Work Queues see section section *10 – Queues*.

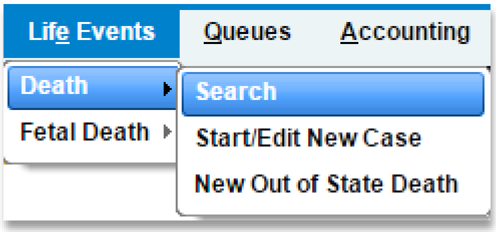
7. Search or Locate Records

To access an existing record, a user will either be assigned the ability to *Search* for or *Locate a Case*. The options available are determined by the security privileges assigned to the user's role.

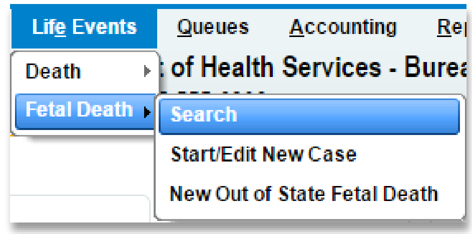
7.1 Search for a Record

The Search feature allows a user to find all matching records entered within the system, not just those records owned by the Facility selected at login.

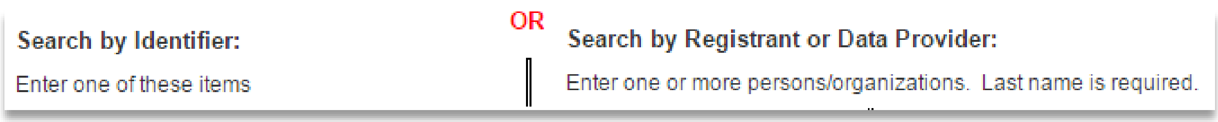
To search for an existing record, from the Main Menu choose *Life Events > Death -or- Fetal Death > Search*.



-OR-



The Search page displays allowing for the user to choose between two differing ways to search:



Search by Identifier Designed to return results based on case-specific record data such as *File Number*, *Case Id*, *ME Case Number* or *Medical Record Number.* Searching by this data will most often return a single record.

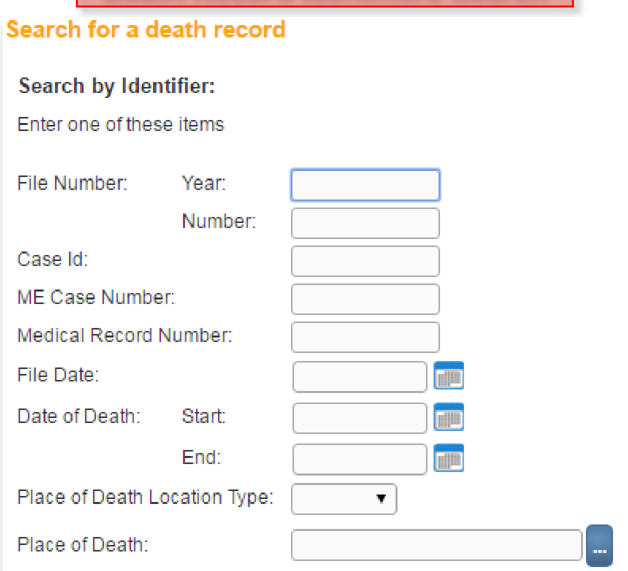
Search by Registrant or Data Provider Designed to search on a wider array of record data such as *Registrant Name, Facility Name, Medical Certifier Name, or Mother or Father Name.*

Search fields are not case-sensitive. Upper and lower case letters are allowed.

7.1.1 Search by Identifier

The differences between the Death and Fetal Death Identifier search options:

Death Record Identifiers Search



Fetal Death Record Identifiers Search

Identifier Search Items Available in Both Death and Fetal Death Search

File Number: A file number is composed of two elements: *Year* and *Number*.

- *Year* is the year in which the death occurred (4 digits).

- *Number* is the unique 6 digit number assigned to the record upon registration by DAVE™.

The combination of both numbers comprise the State File Number (SFN). Both numbers are required in order to perform a search by File Number.

Case ID: This is a unique number DAVE™ assigns each case once it's been created and saved regardless of registration status.

ME Case Number: This is the unique number assigned by the medical examiner. Not all cases will have an *ME Case Number* as not all cases are worked on by the ME.

File Date: This is the date on which the case officially received a "Registered" status. Any case filed on a particular date will be returned when searching by File Date.

Date of Death or Date of Delivery: By using the *Start* and *End* dates, DAVE™ will return all cases with the range entered. If only a *Start* date is entered, DAVE™ will look for all cases that match the exact date entered in the *Start* field.

Place of Death or Delivery Location Type: Used in conjunction with *Place of Death or Place of Delivery* to determine whether the search should be executed based on County or City of registration.

Place of Death or Location Name: Select the Place Lookup icon to choose from a list of County or City locations based on the selection made in *Place of Death* or *Delivery* location type. A direct manual entry can also be made.

Identifier Search Items Available for Death Search Only

Medical Record Number: This is the unique number assigned by the medical certifier. Not all cases will have a *Medical Record Number* as it is not a required field in DAVE™

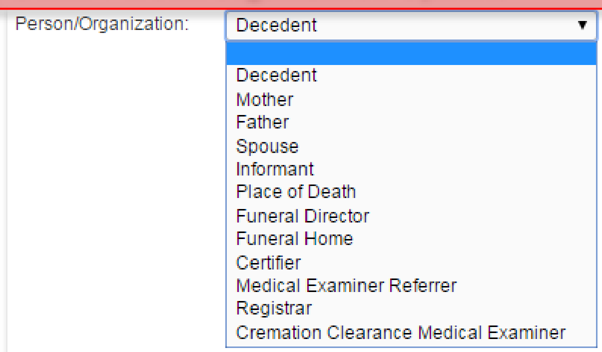
7.1.3 Search by Registrant or Data Provider

Search by Registrant or Data Provider includes the same search criteria whether searching for Death or Fetal Death cases, the difference being the types of Registrant or Data Providers that can be searched for.

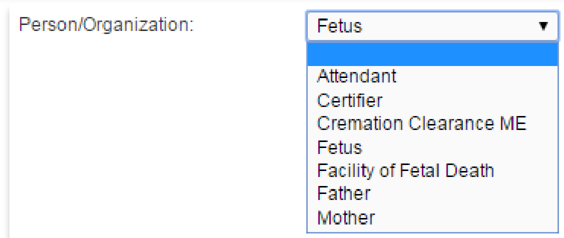
Steps to Search by Registrant or Data Provider

1. Select the type of *Persons/Organizations* for which search criteia will provided.

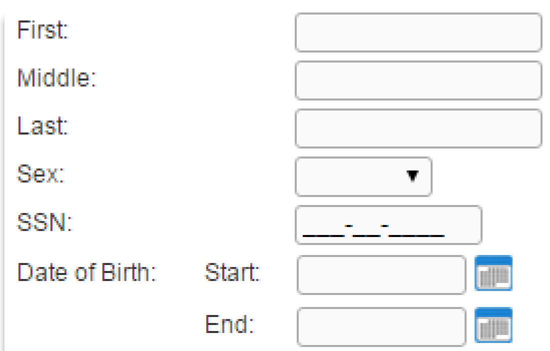
Death Person/Organization Options



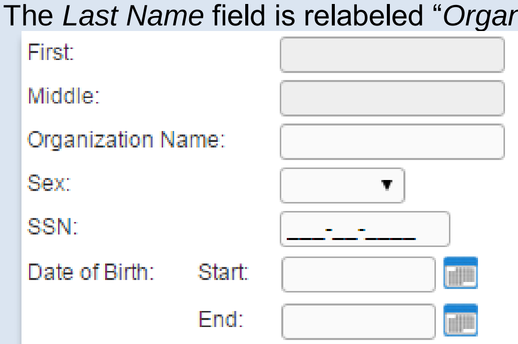
Fetal Death Person/Organization Options



2. Based on the *Person/Organization Type* selected, enter specific search criteria.



If an Organization rather than Person Type is selected, the *First* and *Middle Name* fields will be disabled. The *Last Name* field is relabeled "*Organization Name" instead.*

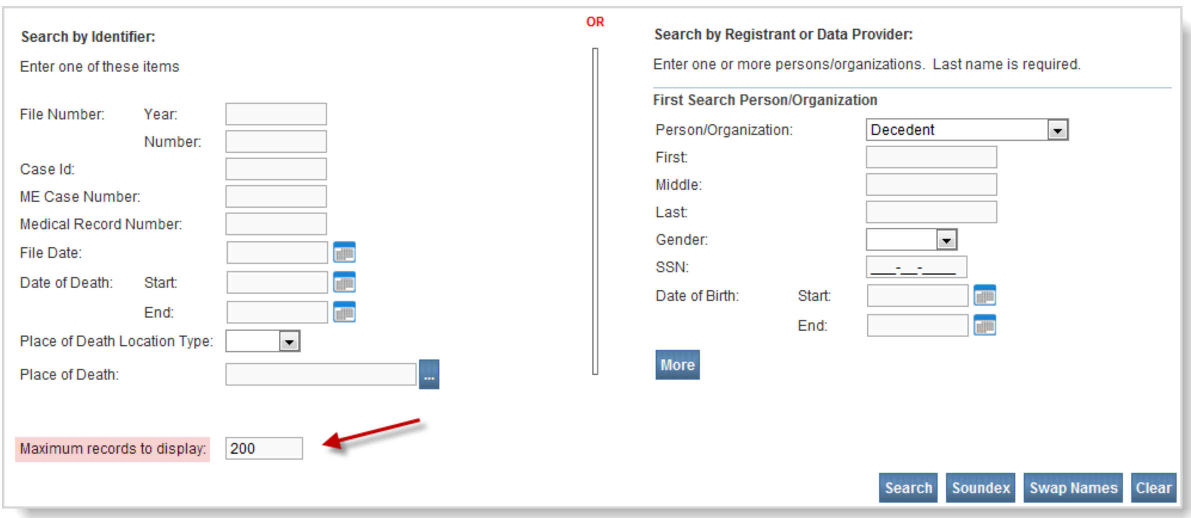


The *More* button allows users to include more than one person or facility within a single search.

Select the Clear icon to erase search entries and begin another search.

As a general rule, searches should be as specific as possible to minimize the number of entries returned.

Maximum records to display: The Maximum records to display field defaults to 200. This means that, regardless of the actual number of records returned by the search, only 200 will be displayed in the Search Results data grid.



For example, if a user enters a Start Date of Death of Jan-01-2011 and an End Date of Death of Dec-31-2011, then the total records returned might be greater than 200 but only 200 records would be displayed.

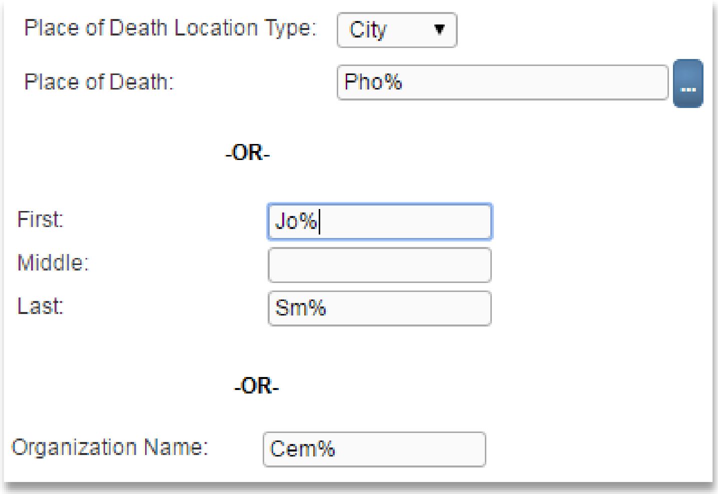
This number can be increased on the Search page to display more than 200 results. However, the maximum numbere of records the system will ever display is 5,000. If a user cannot find the record they are looking for within the maximum number of results allowed, more search criteria should be entered to refine the search results.

7.1.4 Search with a Wildcard

At times, a user may be unsure of spelling or only have a partial name to locate a registration. In these cases, a wildcard search may be helpful. The wildcard can only be entered as search criteria in Name, Places, or Organization fields.

Wildcard search criteria requires the entry of at least two characters followed by the percent sign (%) symbol.

Examples:



Wildcard searches have the potential to return many rows of data. Build searches carefully so that the fewest number of cases are returned.

7.1.5 Types of Searches

Once the Search Criteria has been entered the user may select the type of Search the system performs with the criteria provided. Three search options are available: *Search, Soundex*, or *Swap Names*.

7.1.5.1 Search

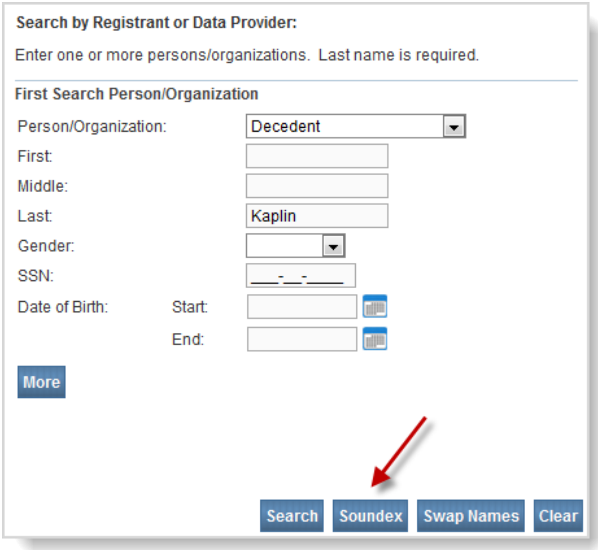
Selecting the basic *Search* button will perform a search and return results based on the exact criteria entered in the search field utilized.

7.1.5.2 Soundex

If the exact spelling of a name is unknown, the *Soundex* search feature may be used. *Soundex* searches for names, places, or organizations that sound similar despite minor differences in spelling.

Soundex cannot be used when Searching by Identifier

Soundex Example:



Selecting *Soundex* returns several records where the last name "sounds like" Kaplin.

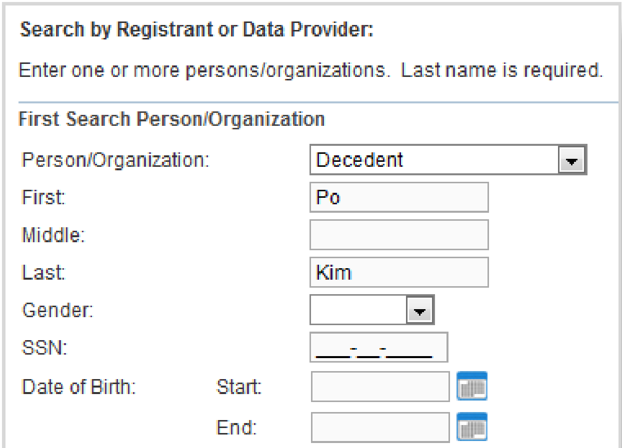
Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
KAAPLANDER, LENA	Jun-10-1964	Female	Philadelphia	999-99-1893	Preview
KAEPPLINGER, IRMA	Aug-06-1960	Female	Philadelphia	999-99-1890	Preview
KAPLAN, ABRAHAM	May-28-1962	Male	Philadelphia	999-99-1900	Preview
KAPLAN, ADA	Apr-10-1960	Female	Philadelphia	999-99-1898	Preview
Kaplan, Adalyn Qq7	Nov-22-2011	Female	Allegheny	May-16-1946	Preview
Kaplan, Alden Qq7	Mar-05-1960	Male	Franklin	999-99-1919	Preview
KAPLAN, ALEXANDER	Oct-24-1964	Male	Bradford	999-99-1898	Preview
KAPLAN, ANNA	Apr-05-1962	Female	Lehigh	999-99-1890	Preview
KAPLAN, ANNA	Jan-12-1962	Female	Philadelphia	999-99-1894	Preview
KAPLAN, ANNIE	Jan-26-1960	Female	Philadelphia	999-99-1876	Preview

7.1.5.3 Swap Names

In certain cultures, a person's family name often comes before their given name. When this is the case, a standard search can sometimes fail to return the desired record(s).

The *Swap Names* feature is used to search for cases where there is some ambiguity between the *First* and *Last* names.

Swap Names Example:

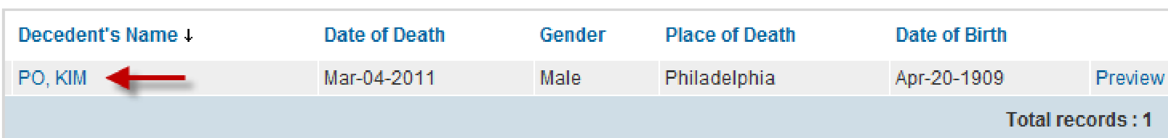

Search by Registrant or Data Provider:

Enter one or more persons/organizations. Last name is required.

First Search Person/Organization

Person/Organization:	Decedent
First:	Po
Middle:	
Last:	Kim
Gender:	
SSN:	___-__-____
Date of Birth: Start:	
End:	

When the basic Search button is selected no results are returned. However, selecting the *Swap Names* button returns the expected case.



Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
PO, KIM	Mar-04-2011	Male	Philadelphia	Apr-20-1909	Preview

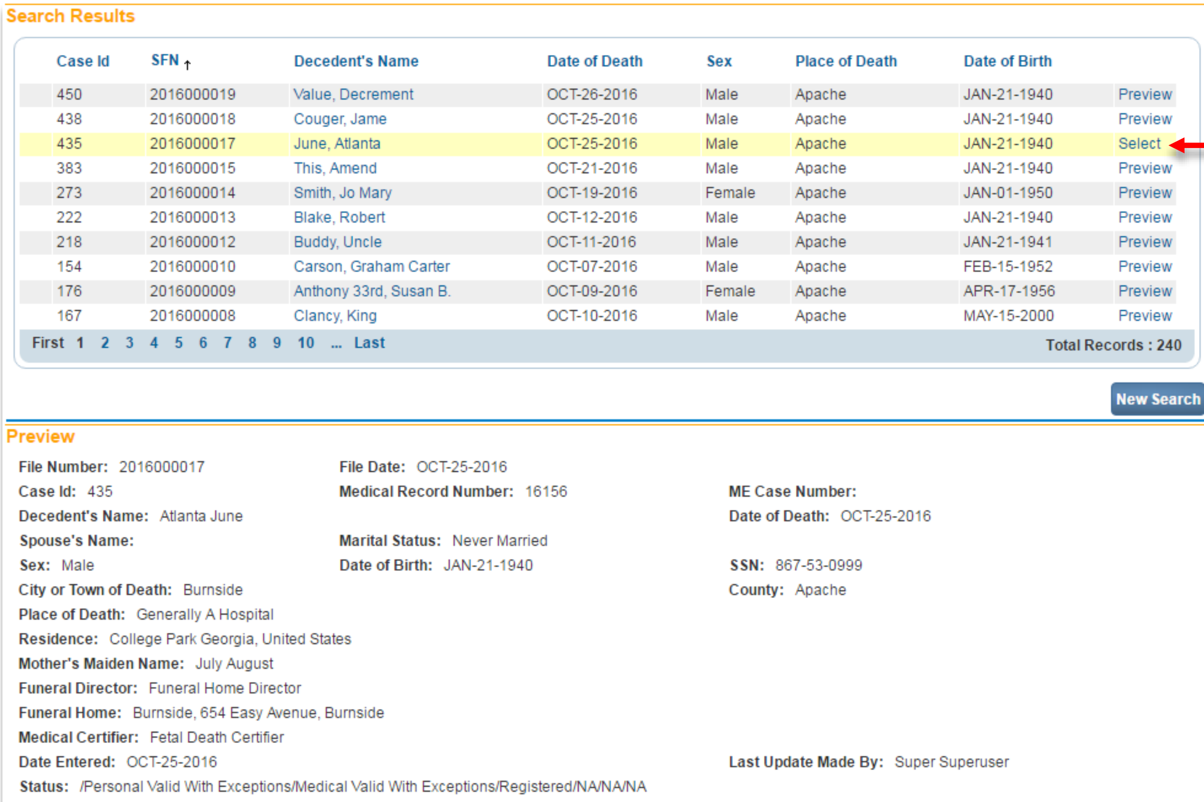
Total records : 1

Like the Soundex feature, Swap Names cannot be used in Search by Identifier fields.

7.1.6 Preview Search Results

When multplie search results are returned use the *Preview* link to view a summary of the record.

The record from which the *Preview* link has been selected will display highlighted and a summary now appears below the search results.



Search Results

Case Id	SFN ↑	Decedent's Name	Date of Death	Sex	Place of Death	Date of Birth	
450	2016000019	Value, Decrement	OCT-26-2016	Male	Apache	JAN-21-1940	Preview
438	2016000018	Couger, Jame	OCT-25-2016	Male	Apache	JAN-21-1940	Preview
435	2016000017	June, Atlanta	OCT-25-2016	Male	Apache	JAN-21-1940	Select
383	2016000015	This, Amend	OCT-21-2016	Male	Apache	JAN-21-1940	Preview
273	2016000014	Smith, Jo Mary	OCT-19-2016	Female	Apache	JAN-01-1950	Preview
222	2016000013	Blake, Robert	OCT-12-2016	Male	Apache	JAN-21-1940	Preview
218	2016000012	Buddy, Uncle	OCT-11-2016	Male	Apache	JAN-21-1941	Preview
154	2016000010	Carson, Graham Carter	OCT-07-2016	Male	Apache	FEB-15-1952	Preview
176	2016000009	Anthony 33rd, Susan B.	OCT-09-2016	Female	Apache	APR-17-1956	Preview
167	2016000008	Clancy, King	OCT-10-2016	Male	Apache	MAY-15-2000	Preview

First 1 2 3 4 5 6 7 8 9 10 ... Last Total Records : 240

New Search

Preview

File Number: 2016000017 File Date: OCT-25-2016
Case Id: 435 Medical Record Number: 16156 ME Case Number:
Decedent's Name: Atlanta June Date of Death: OCT-25-2016
Spouse's Name: Marital Status: Never Married
Sex: Male Date of Birth: JAN-21-1940 SSN: 867-53-0999
City or Town of Death: Burnside County: Apache
Place of Death: Generally A Hospital
Residence: College Park Georgia, United States
Mother's Maiden Name: July August
Funeral Director: Funeral Home Director
Funeral Home: Burnside, 654 Easy Avenue, Burnside
Medical Certifier: Fetal Death Certifier
Date Entered: OCT-25-2016 Last Update Made By: Super Superuser
Status: /Personal Valid With Exceptions/Medical Valid With Exceptions/Registered/NA/NA/NA

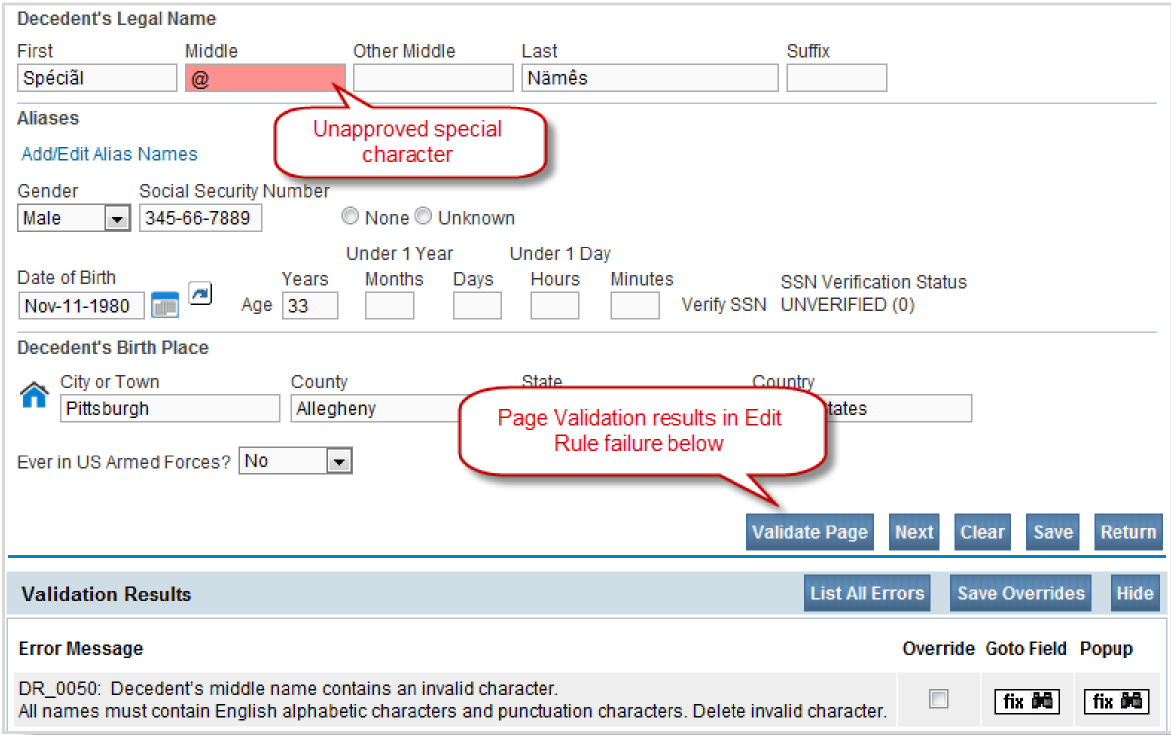
Upon selection, the *Preview* link becomes a *Select* link which allows the user to select and view the registration pages of the record being previewed. The user can also elect to preview additional cases until finding the correct record to select.

7.1.7 Special Characters & Search

DAVE™ allows the use of the following special characters within *First*, *Middle* and *Last* name fields:

Character Name	Symbol	Allowed Combinations
Tildes	~	~ Ã ã Õ õ Ñ ñ
Umlauts	¨	¨ Ä ä Ë ë Ï ï Ö ö Ü ü Ÿ ÿ
Acute accents	´	´ Á á É é Í í Ó ó Ú ú Ý ý
Circumflex	ˆ	ˆ Â â Ê ê Î î Ô ô Û û

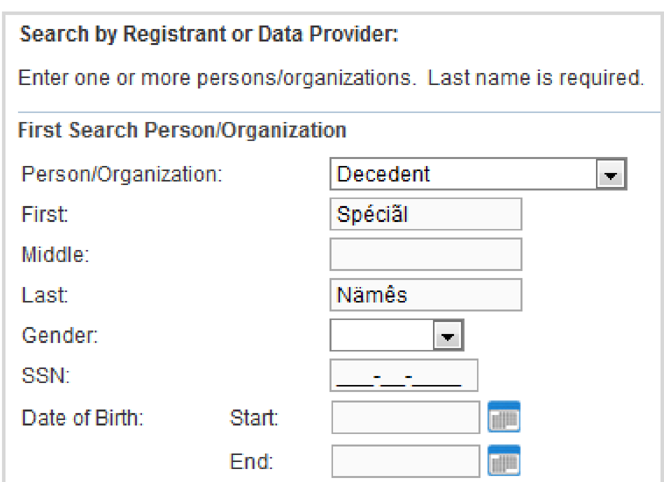
Special characters other than those referenced above are not allowed and will trigger an edit rule failure upon page validation. See example below:



Special Characters & Search: If allowed special characters are entered in the *First*, *Middle*, or *Last* name search fields, DAVE™ will return all matching names whether or not they contain the special characters.

Example

A search for a name containing allowed special characters returns all matches, even those not containing the special character:



Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death
26630127		Names, Special	Jan-30-2014
26630126		Nämês, Spéciãl	Jan-31-2014

In contrast, standard keyboard characters (a-z, A-Z, ‘, -) entered as search criteria will return only an exact match.

Example

Searching for Henry O’Leary-Frank returns only the exact match.

Search Results

Case Id	SFN	Decedent's Name ↓
26630126		O'Leary-Frank, Henry

Even when the same name without the characters exists in the system

Search Results

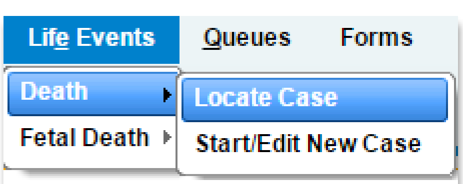
Not returned

Case Id	SFN	Decedent's Name ↓
26630127		OLearyFrank, Henry

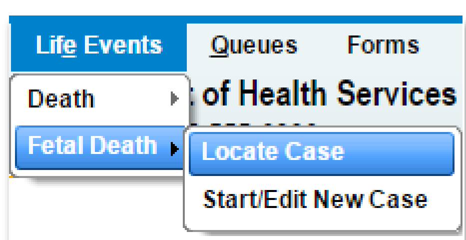
7.2 Locate a Record

The Locate Case feature allows a user to search for and access those records owned by the Facility selected at login. The Locate Case feature will not display any records not associated with the current facility.

To locate an existing record that belongs to the facility selected at login, , select *Main Menu > Life Events > Death -or- Fetal Death > Locate Case*.

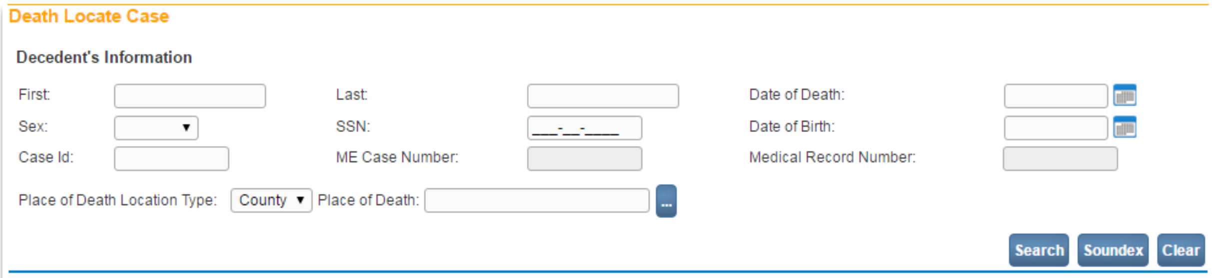


-OR-



7.2.2 Death Record Locate Page Search Criteria

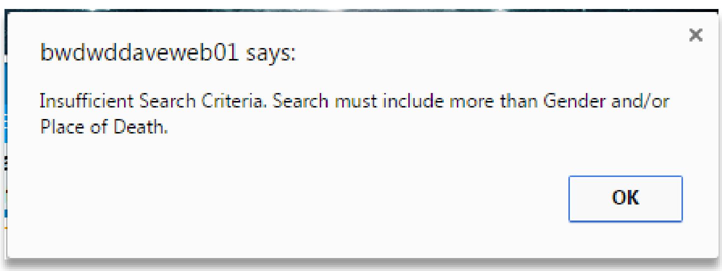
The following fields are available for locating Death Records owned by the facility.



First and Last Name: Only the *Last Name* is needed to locate a record. If the first and last name is entered, a narrower rangfe of search results will be returned.

Date of Death: The system will locate all cases owned by the facility in which the *Date of Death* on the record matches the date entered on the Locate Case page.

Sex: Sex cannot be the only search criteria entered when locating a record. Last Name or Date of Event must also be entered. If Sex is the only item entered the following error message will be displayed:



SSN: The system will locate any case owned by the facility in which the SSN on record matches that entered in the search criteria.

Date of Birth: The system will locate all cases owned by the facility in which the *Date of Birth* on the record matches that entered in the search criteria.

Case ID: The *Case ID* is a unique identifier assigned to each record. When using the *Case ID* to locate a record, only the specific record matching the *Case ID* entered will be returned.

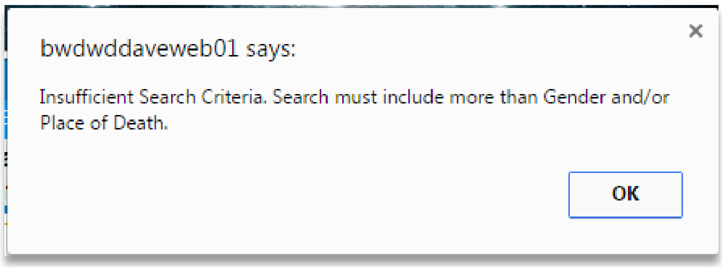
ME Case Number: The *ME Case Number* is a used to locate records in which a medical examiner has assigned a case number to the record. If the case was not worked on by a medical examiner, no *ME Case Number* will be assigned to the record.

Medical Record Number: The *Medical Record Number* is a used to locate records in which a medical record number has been assigned. *Medical Record Number* is not required and therefore not all records will have one.

Place of Death Location Type: Used in conjunction with *Place of Death* to determine whether the search should be executed based on County or City.

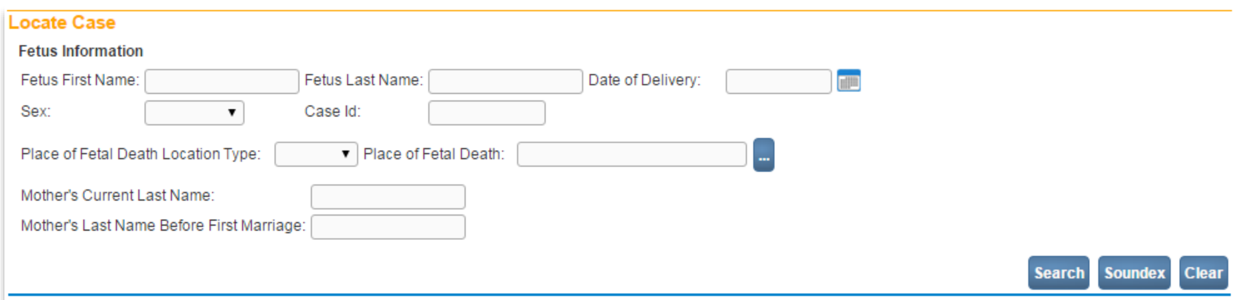
Place of Death: Select the Place Lookup icon to choose from a list of County or City locations based on the selection made in *Place of Death* or *Delivery* location type. Entries may also be keyed in manually.

The Place of Death cannot be the only criteria entered to locate a record. If Place of Death is the only item entered the following error message will be displayed:



7.2.3 Fetal Death Record Locate Page Search Criteria

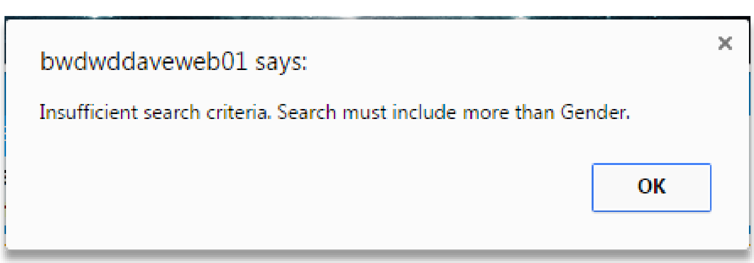
The following fields are available when using the Fetal Death Locate Case page.



First and Last Name: Only the *Last Name* is needed to locate a record. If the first and last name is entered, a narrower rangfe of search results will be returned.

Date of Death: The system will locate all cases owned by the facility in which the *Date of Death* on the record matches the date entered on the Locate Case page.

Sex: Sex cannot be the only search criteria entered when locating a record. Last Name or Date of Event must also be entered. If Sex is the only item entered the following error message will be displayed:

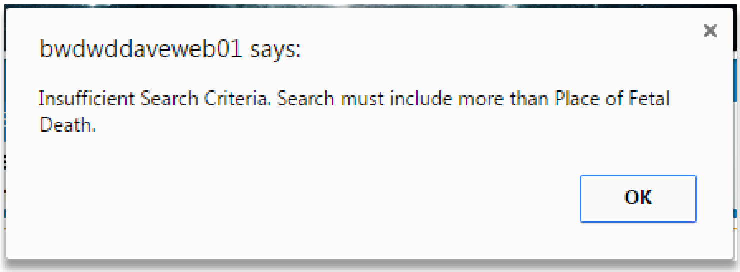


Case ID: The *Case ID* is a unique identifier assigned to each record. When using the *Case ID* to locate a record, only the specific record matching the *Case ID* entered will be returned.

Place of Fetal Death Location Type: Used in conjunction with *Place of Death* to determine whether the search should be executed based on County or City.

Place of Fetal Death: Select the Place Lookup icon to choose from a list of County or City locations based on the selection made in *Place of Death* or *Delivery* location type. Entries may also be keyed in manually.

The Place of Death cannot be the only criteria entered to locate a record. If Place of Death is the only item entered the following error message will be displayed:



Mother's Current Last Name: The system will locate all cases owned by the facility in which the *Mother's Current Last Name* on the record matches the search criteria entered.

Mother's Last Name Before First Marriage: The system will locate all cases owned by the facility in which the *Mother's Last Name Before First Marriage* on the record matches the search criteria entered.****

7.2.4 Types of Locate Searches

Once the Search Criteria has been entered the user may select the type of Search the system performs with the criteria provided. Three search options are available: *Search, Soundex*, or *Swap Names*.

7.2.4.1 Search

Selecting the basic *Search* button will perform a search and locate records based on the exact criteria entered in the search field utilized.

7.2.4.2 Soundex Searches

If the exact spelling of a name is unknown, the *Soundex* search feature can be used. *Soundex* looks for names, places, and organizations that are similar in sound despite minor differences in spelling.

See section *7.1.5, Preview Search Results*, for using the Preview options within the Located Record Results

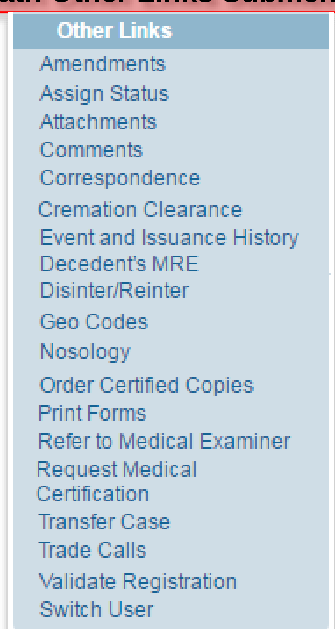
See section *7.1.6, Special Characters & Search*, for information on searching with Special Characters; which works the same when searching via the Locate Case feature.

8. Other Links

Other Links is submenu of the Death and Fetal Death Registration Menus that contains a variety of links used in the registration process. The availablity of links within the *Other Links* submenu is dependent upon the user security privileges assigned to the user role. Also, some links may or may not be available depending on the current registration status. For example, records may only be amended after they have received a “Registered” status. Therefore, the *Amendments* link will not appear in the *Other Links* submenu until the registration has reached a registered status.

The following pages are available through the Death and Fetal Death *Other Links* submenus. Some pages are common to both event types while others are specific to Death or Fetal Death.

Death Other Links Submenu



Fetal Death Other Links Submenu

8.1 Amendments

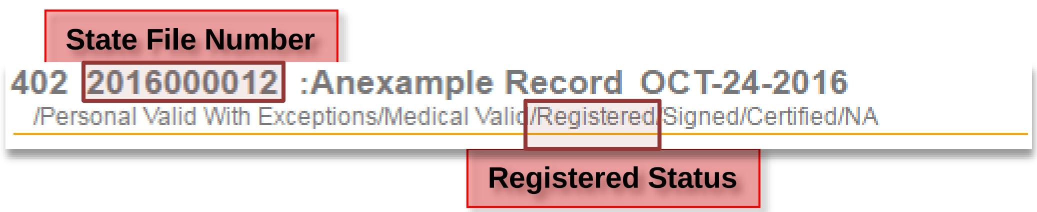
Amendments are requests to change a record after it has been registered.

Typical amendments can involve typographical errors which occurred during data entry. Other amendments might require the submission of documentary evidence supporting the request to change to item(s).

The order processing module in the DAVE™ application provides the ability to link an order to an amendment by providing the ability to enter customer-initiated mail or walk-in amendment requests. If the amendment requires a fee to be paid by the individual requesting the amendment, the amendment can be initiated in the order processing module. Once customer, payment, and search information has been entered within the order processing module, the user has the ability to navigate directly to the amendment page for the record selected. Upon completion of the amendment, the user has the ability to return to the order processing pages and complete the order.

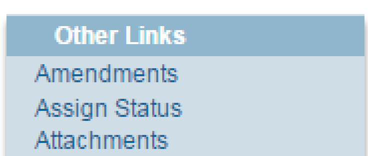
8.1.1 Creating Amendments

Amendments can only be created for records that have been registered. A registered record will have a *State File Number* and a status of *Registered*.

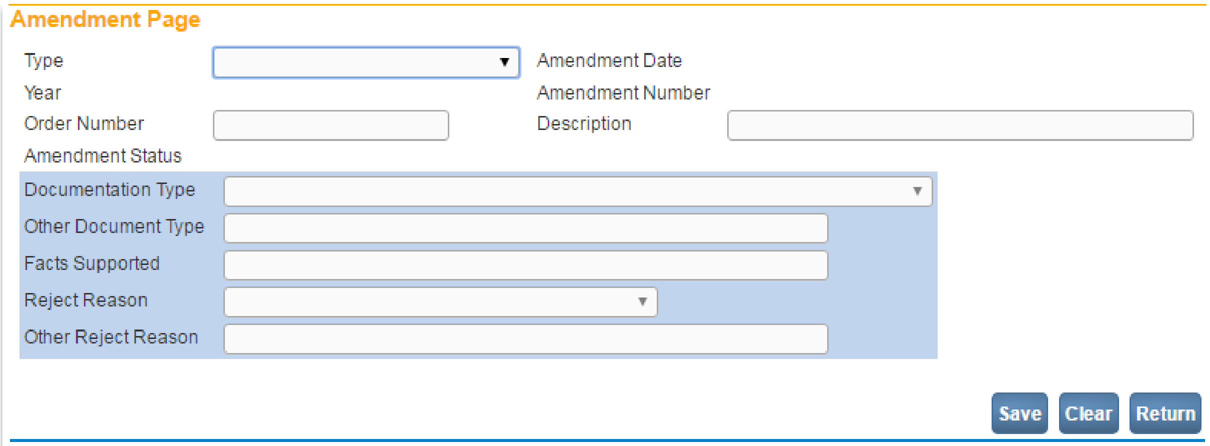


Steps to Create an Amendment

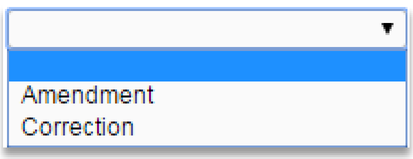
1. From within the registered record select *Other Links > Amendments:*



The Amendment Page will be displayed.



2. Select an amendment type from the *Type* dropdown.



The Amendment Types available will vary based on the security privileges assigned to the user.

The remaining items are not required but may be beneficial during review and approval of the amendment.

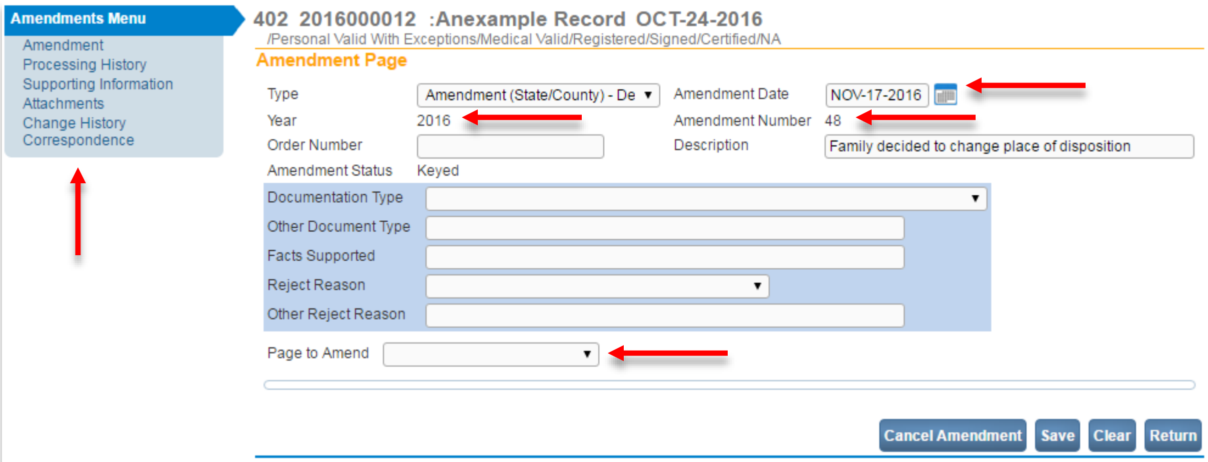
Order Number: This item may be system filled if the amendment is started through the *Order Processing* pages. If there is an order associated to amendment, but the amendment was not started from this order, the *Order Number* can be manually entered.

Description: This field is intended to capture any brief information that may help the user processing the amendment to understand why the amendment is needed on the record.

These items are only available for completion by State or County staff. To complete them select a value from the dropdown, or, if no dropdown exists, type the information manually into the field.

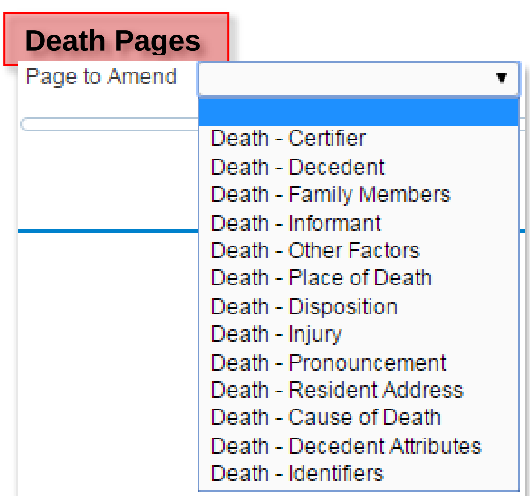
3. Once the items have been entered select *Save*.

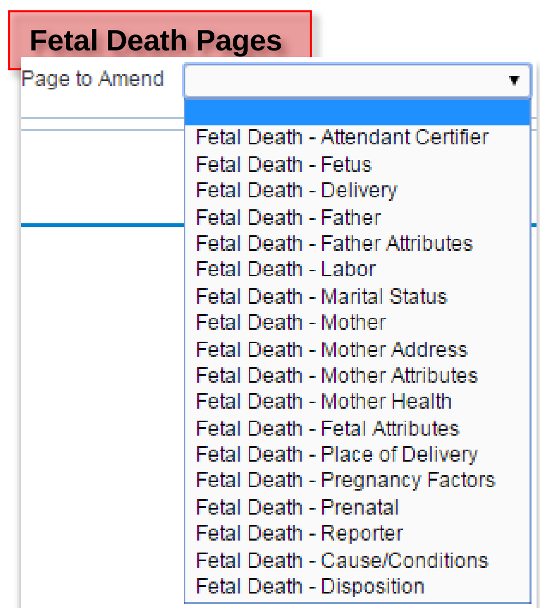
The *Save* function creates the amendment and:



- The *Amendments Menu* appears in the left navigation
- The *Amendment Date* is system-filled with the current date
- The *Year* is populated
- A unique *Amendment Number* is assigned.
- The *Page to Amend* dropdown appears

4. From the *Page to Amend* dropdown, select the page that needs to be updated.

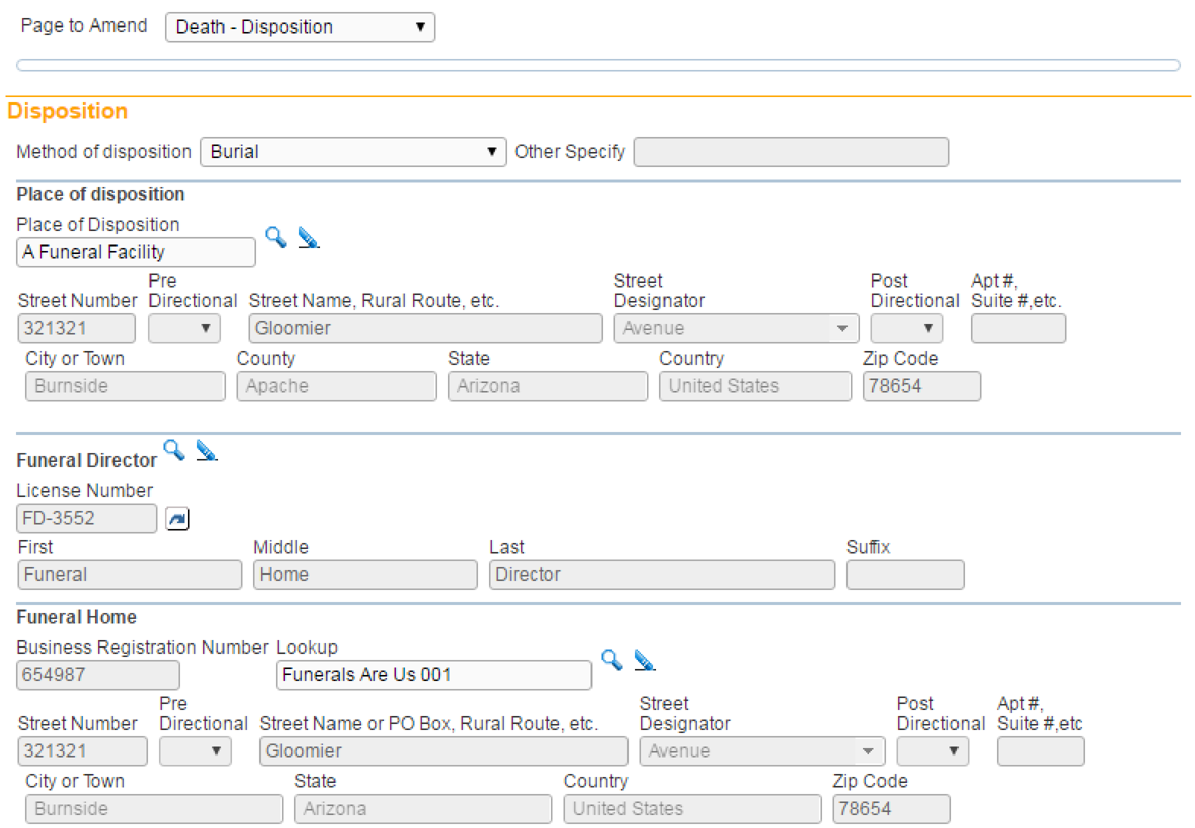




The *Pages* available to amend will depend on the security privileges assigned to the User.

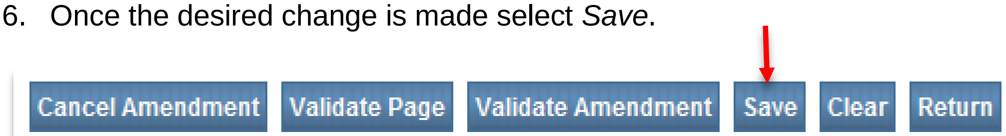
For example, a funeral director will typically only be allowed to amend those *Death* or *Fetal Death Registration* pages containing *Personal Information*. Medical certifiers will typically only be allowed to amend those *Death* or *Fetal Death Registration* pages containing *Medical Information*.

5. The page selected to amend will be displayed within the Amendment page. The current registration data will be displayed. In this example the *Disposition Page* was selected.



The items available to amend will differ depending on the page selected and individual user security. Typically a user can make changes by either manually typing over a current entry, selecting a new entry from a dropdown list, or by using LOV search tool.

6. Once the desired change is made select *Save*.



Additional options include:

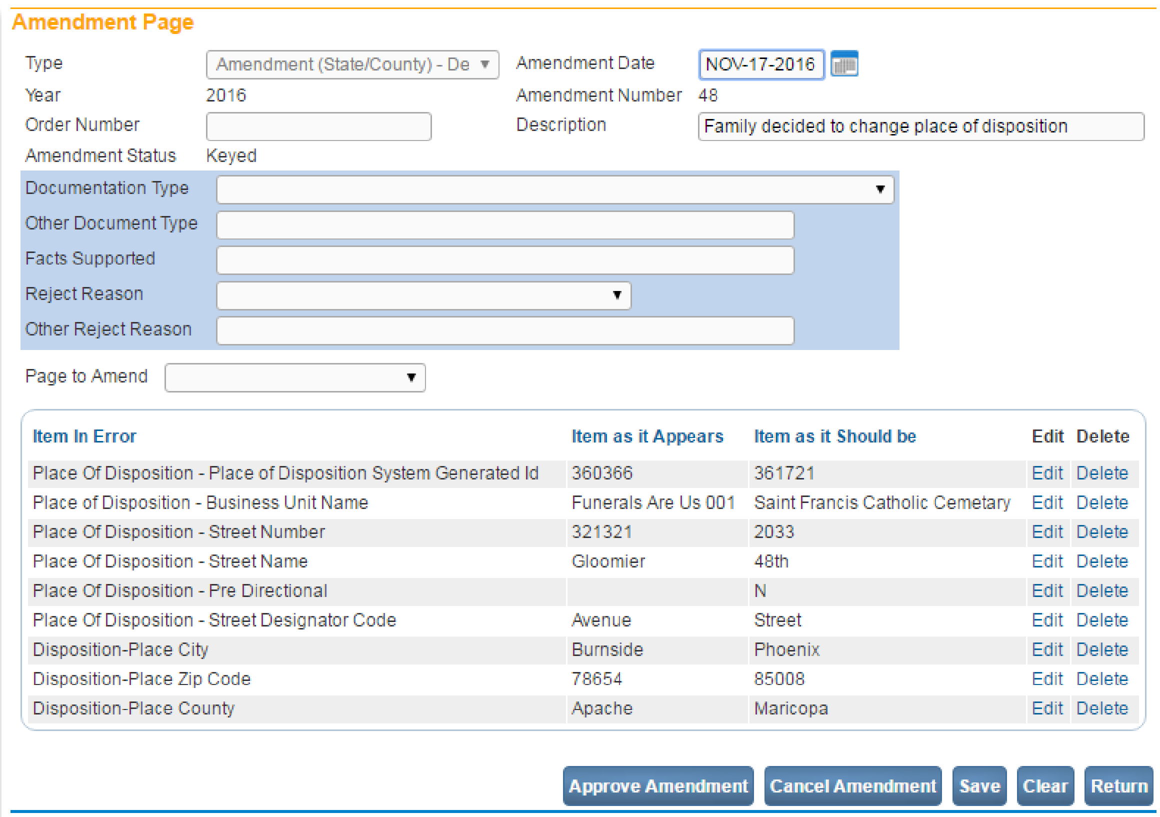
Cancel Amendment: The amendment will be cancelled and the *Amendment Status* will be set to *Cancelled*.

Validate Amendment: Runs the validation process and determines if the amendments made to the page could cause data quality issues. The user does not need to correct these validation errors to submit the amendment request.

Clear: Clears all information entered since last prior Save.

Return: Returns user to the previous page.

Upon selection *Save*, the *Amendments* page will refresh and the changes entered are displayed in *Item in Error* data grid:


Amendment Page

Type: Amendment (State/County) - De
Amendment Date: NOV-17-2016
Year: 2016
Amendment Number: 48
Order Number:
Description: Family decided to change place of disposition
Amendment Status: Keyed
Documentation Type:
Other Document Type:
Facts Supported:
Reject Reason:
Other Reject Reason:
Page to Amend:

Item In Error	Item as it Appears	Item as it Should be	Edit	Delete
Place Of Disposition - Place of Disposition System Generated Id	360366	361721	Edit	Delete
Place of Disposition - Business Unit Name	Funerals Are Us 001	Saint Francis Catholic Cemetary	Edit	Delete
Place Of Disposition - Street Number	321321	2033	Edit	Delete
Place Of Disposition - Street Name	Gloomier	48th	Edit	Delete
Place Of Disposition - Pre Directional		N	Edit	Delete
Place Of Disposition - Street Designator Code	Avenue	Street	Edit	Delete
Disposition-Place City	Burnside	Phoenix	Edit	Delete
Disposition-Place Zip Code	78654	85008	Edit	Delete
Disposition-Place County	Apache	Maricopa	Edit	Delete

Approve Amendment | Cancel Amendment | Save | Clear | Return

If additional items need to be submitted to amend the record, simply follow these steps again.

1. Select a *Page to Amend*
2. Make changes
3. Select *Save*

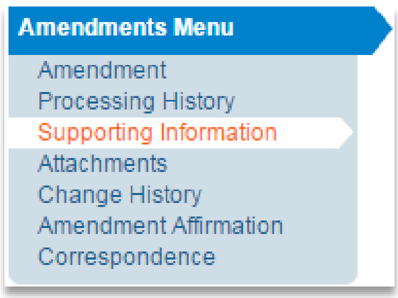
This process can be repeated as many times as is necessary to ensure the amendment is submitted with all the corrections that may be needed on the record.

8.1.2 Adding Supporting Information

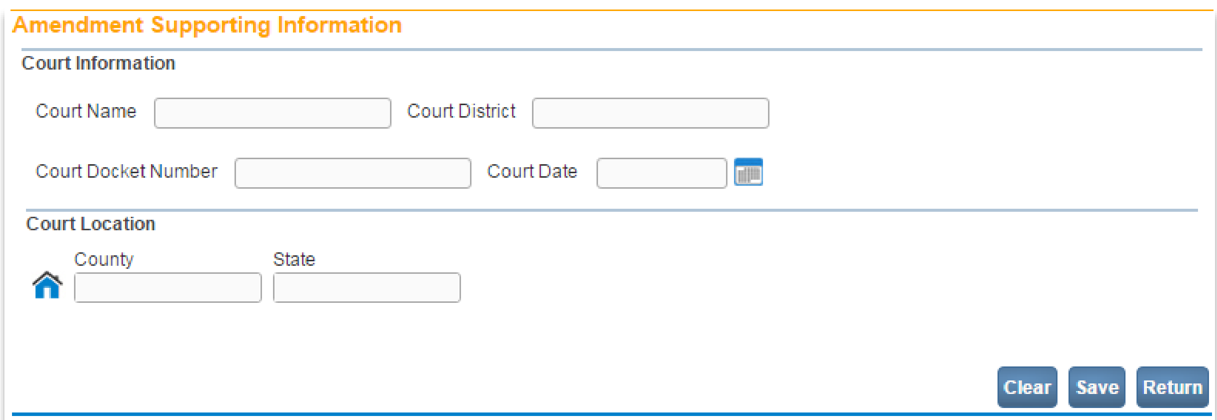
The amendment *Supporting Information* page provides a place to enter court documentation information relevant to the amendment.

Steps to Enter Supporting Information

From the Amendments Menu, select *Supporting Information*.



The Amendments Supporting Information page displays.



District Court Information: For court ordered amendments or other amendments that require judicial approval, the District Court Information section should be completed. Enter the *Court Name*, *Court District*, *Court Docket Number*, and *Court Date* fields with information relevant to the specific jurisdiction.

Court Location: Enter the *County* and *State* manually or select the location using the Place lookup icon .

Once all the Court Information is entered select *Save* and the information entered will be saved to the amendment.

8.1.3 Adding Attachments to Amendments

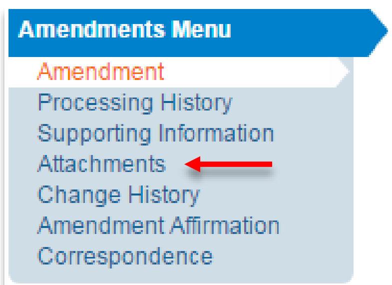
The ability to view, edit, and/or delete attachments is based on security privileges.

Certain types of amendments require the submission of supporting documentation. This documentation may include court orders, birth certificates, death certificates, geneological records, etc.

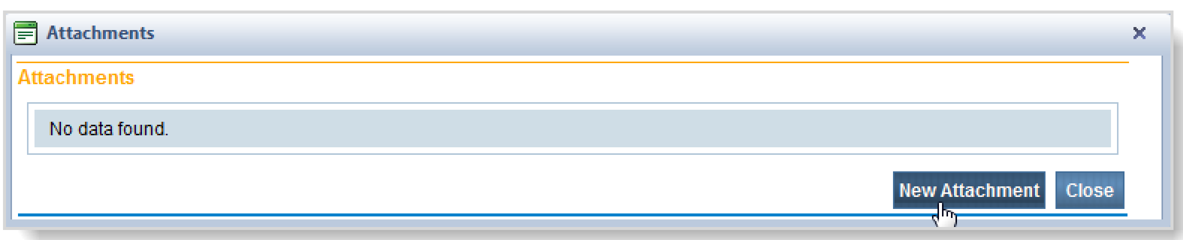
To upload supporting documents into DAVE™, the document must first be rendered into an electronic format. Any document that is not already an electronic file must be scanned first.

Steps to Add an Attachment

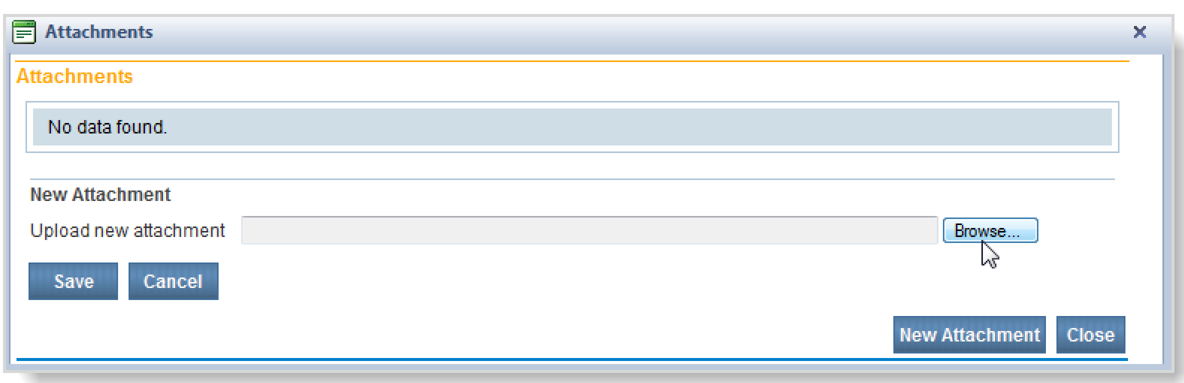
1. From the Amendments Menu, select *Attachments*.



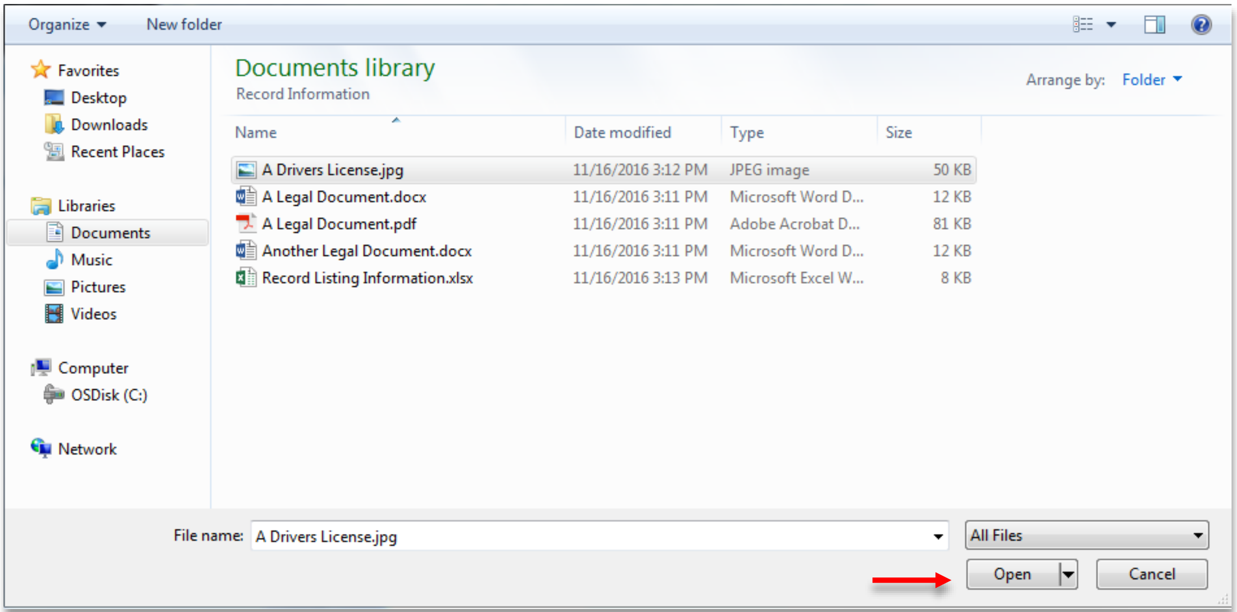
2. The Attachments window appears as a pop-up. Select the *New Attachment* button.



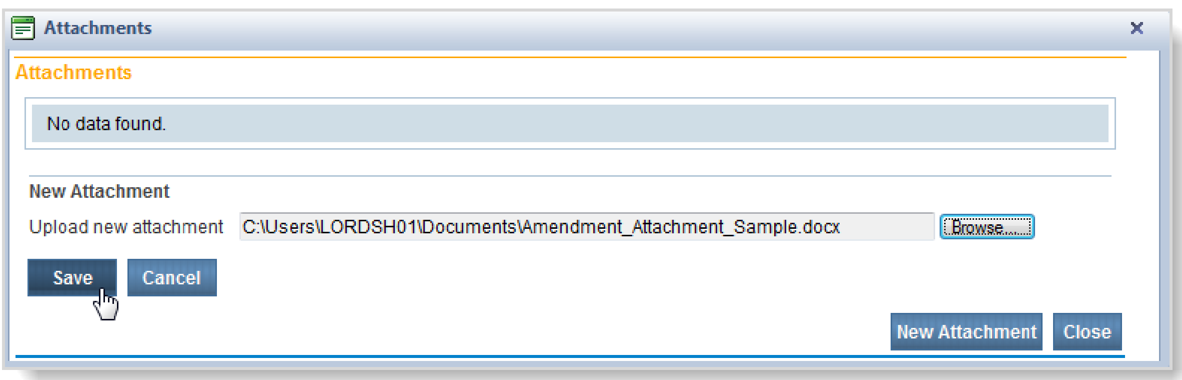
3. Select the *Browse* button to access local or network drives.



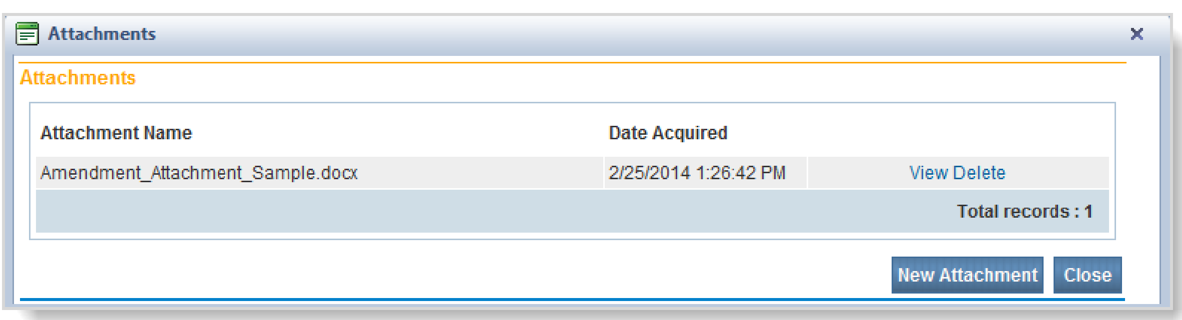
4. Select the document to be uploaded as an Attachment to the Amendment.



5. Once the supporting documentation is selected, select the *Save* button.



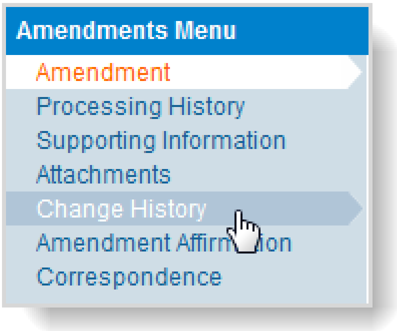
Selecting the *Save* button uploads the attachment to amendment. The *Attachments* pop-up displays the name of the attached file.



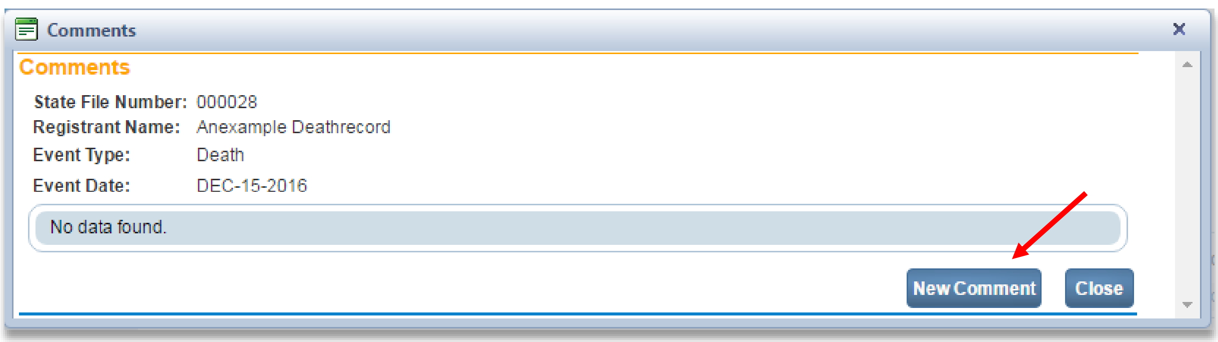
Once the document has been attached, users with the appropriate security privileges will be able to view and/or delete the attachment using the *View* or *Delete* links.

8.1.4 Change History

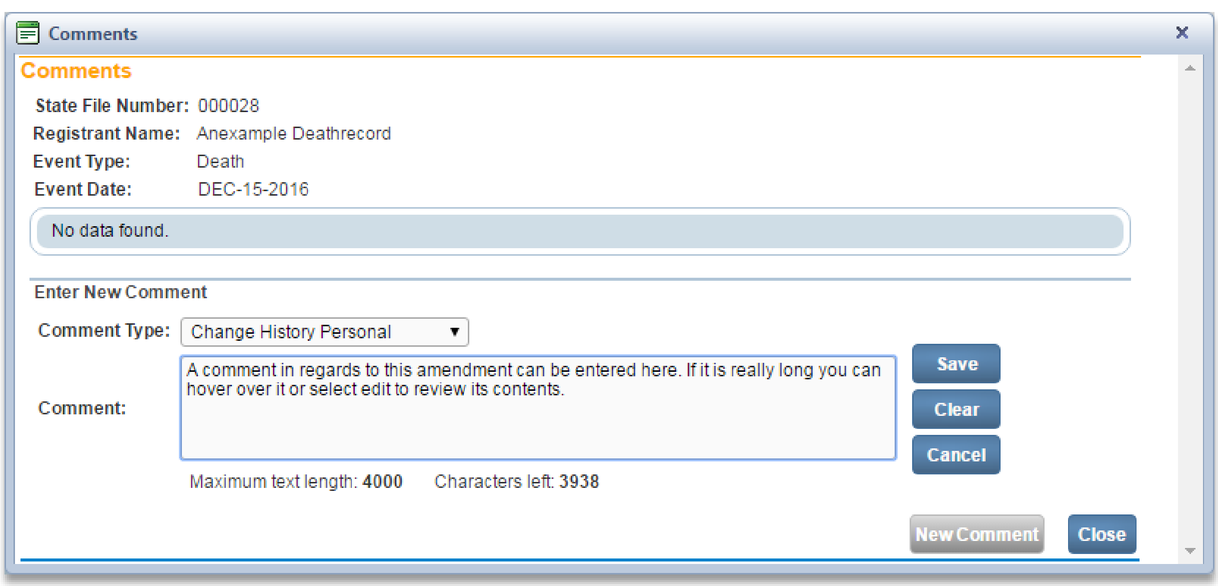
Change History contains comments relevant to the amendment. Comments may be system generated or manually entered.



Upon selection of the *Change History* link, the Comments pop-up window is displayed. Selecting the *New Comment* button will display the comment entry field.

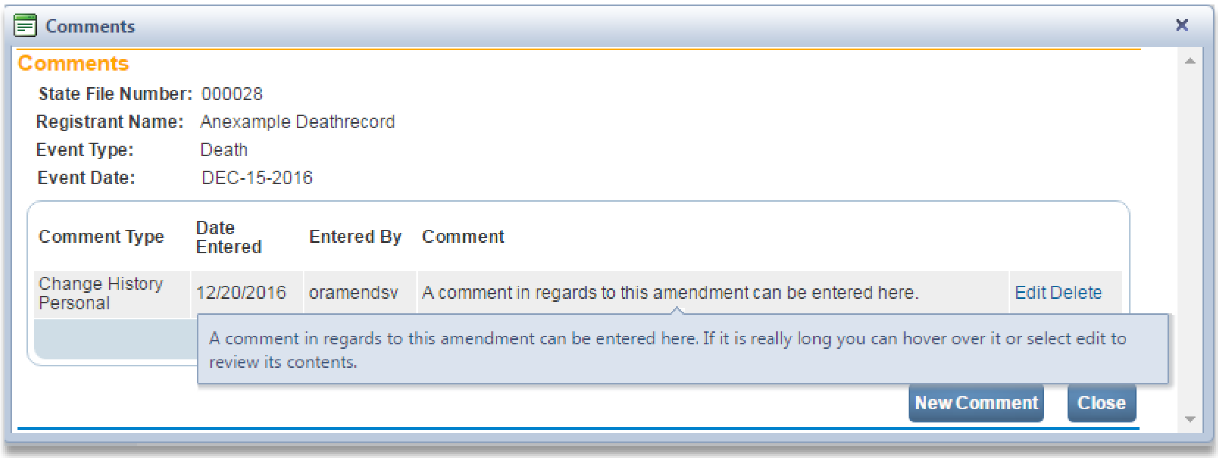


1. Select the *Comment Type* from the dropdown and then enter the comment in the text box.



2. Select Save to save the comment, Clear to remove unsaved comments, or Cancel to leave close the comments window.

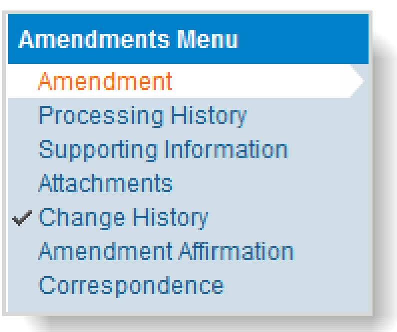
Select **Clear** to clear the comment entry.
Select **Cancel** to cancel and exit out of comment entry field.



Once saved the comment will be displayed in the main comments tab. If the comment is longer than the data grid display, the user can allow the cursor to hover over the field to display the full comment.

Select the *Edit* link to view and change the comment or the *Delete* link to remove the comment.

A checkmark is placed adjacent to the Change History link once a Comment has been added in the Change History section to a death record.



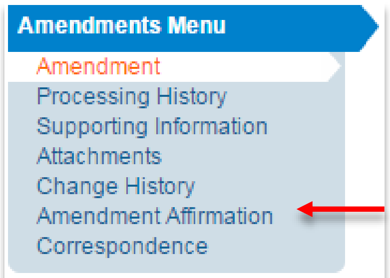
8.1.5 Amendment Affirmation

The Amendment Affirmation process is used by external data providers to affirm an amendment before submitting it to the state for approval.

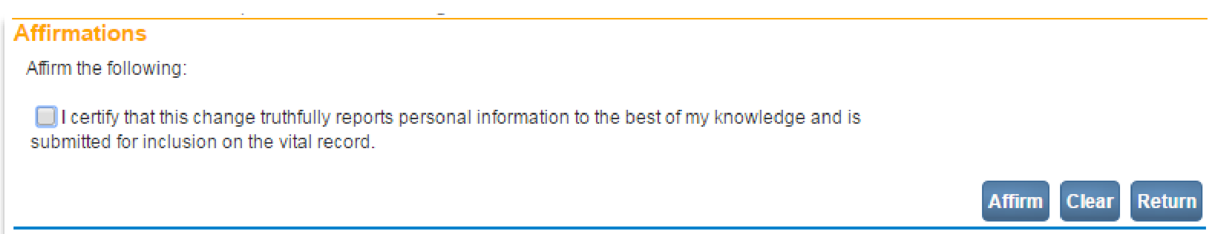
State and County users are not required to affirm amendments.

Steps to Affirm the Amendment

1. Select the Amendment Affirmation link from the Amendments Menu



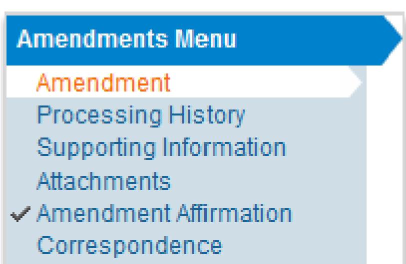
The Affirmations page displays.



2. Select the checkbox next to the affirmation and then select *Affirm*.

The affirmation will be saved and an Authentication Successful message displayed.

A checkmark will be displayed next to the *Amendment Affirmation* link within the *Amendments* menu. The *Amendment* page will be disabled and any further corrections will require the entry of a new amendment.

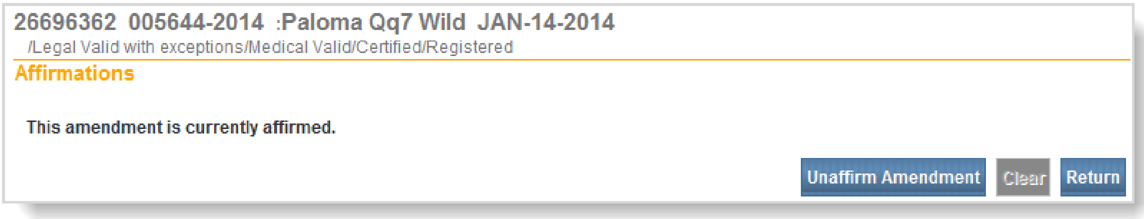


Steps to Unaffirm the Amendment

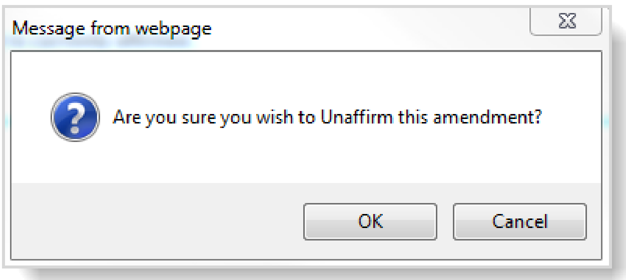
If further corrections need to be added to the amendment, and the amendment has not yet been *Approved*, the amendment may be *Unaffirmed*.

To unaffirm an amendment, the user should select the *Amendment Affirmation* link once again from the *Amendments Menu*.

The *Affirmations* page displays an *Unaffirm Amendment* button used to remove the affirmation.



Upon selection of the *Unaffirm Amendment* button, the following message will be displayed:

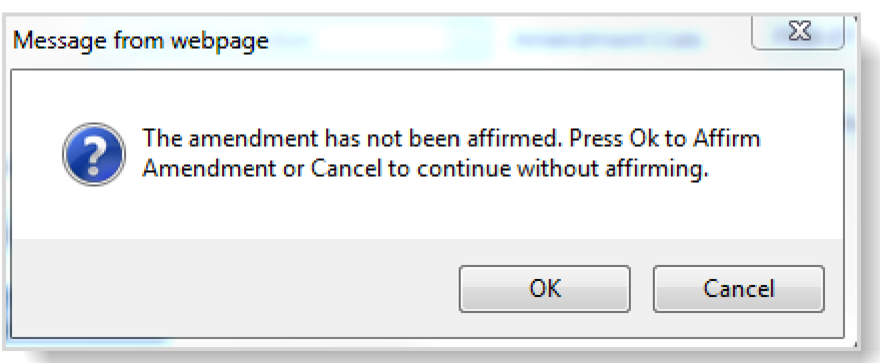


Select *OK* to *Unaffirm* the amendment.

The *Amendment* page will then be re-enabled and additional correction information may be entered.

Amendments **MUST** be affirmed before they may be submitted to the State or County official for approval.

If the office creating the amendment selects to exit amendment process before affirmation is provided the following error message will be displayed:



- If the *OK* button is selected, the Affirmations page will be displayed and the user can affirm the amendment.

- If the *Cancel* button is selected, the user will leave the amendments page without affirming the amendment.

Return to Affirm Amendment

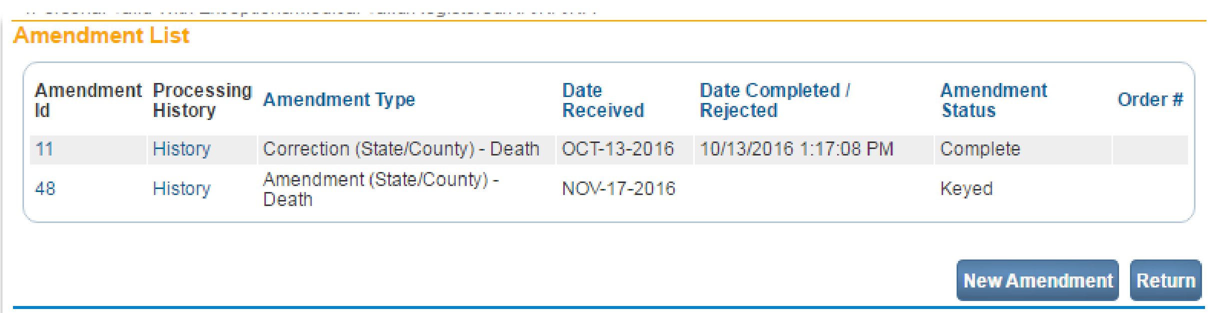
There are two ways a user can return to affirm an Amendment at a later time.

1. Selecting the amendment from the *Amendment Work Queue* titled *Affirmation Required*

> More information on Work Queues can be found in section *10 – Queues*.

2. From within the *Death* or *Fetal Death Registration* select the *Amendment List* link from the *Registrar* menu

The *Amendments List* page will be displayed. The user can now select the amendment from a list.



Amendment Id	Processing History	Amendment Type	Date Received	Date Completed / Rejected	Amendment Status	Order #
11	History	Correction (State/County) - Death	OCT-13-2016	10/13/2016 1:17:08 PM	Complete	
48	History	Amendment (State/County) - Death	NOV-17-2016		Keyed	

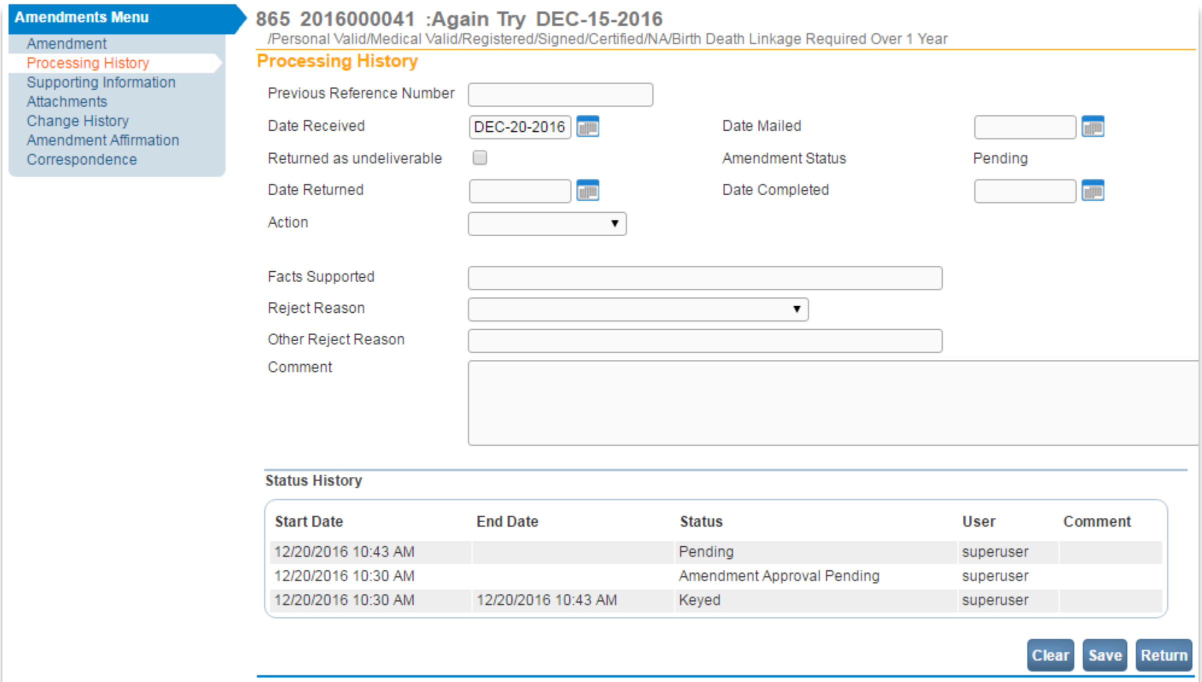
Either options will take the user back to the amendment where they can add more items to correct and/or affirm the amendment.

8.1.6 Approving Amendments

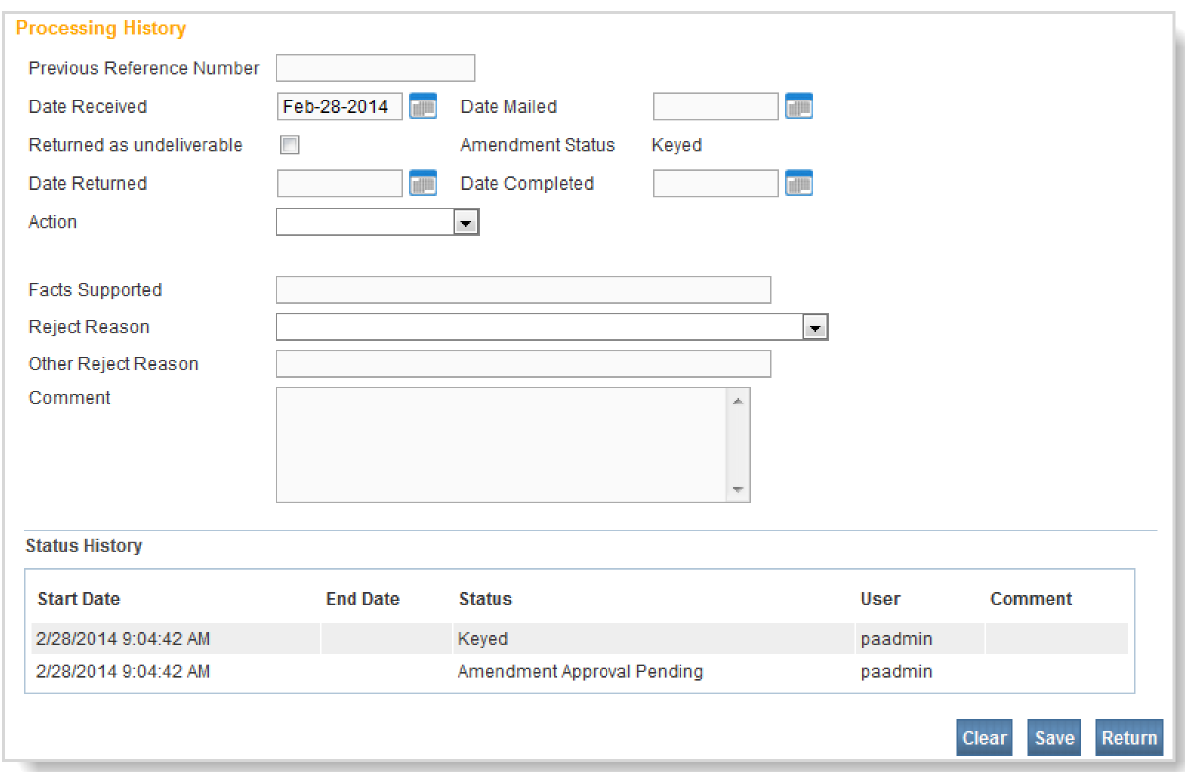
In some jurisdictions, amendments must be reviewed and approved before taking effect. Select the *Processing History* link from the Amendments menu to proceed with review or approval of the amendment. Typically, amendments go through a review process where the change is ultimately either approved or rejected. The Processing History page supports this process. Depending on office size and/or delegation of roles and responsibilities, an amendment may be processed by one person or several. The abiltiy to review and approve amendments is typically restricted to State and County users.

Steps to Amendment Approval

1. Select *Processing History* in the Amendments Menu



2. Complete the fields on the Processing History page.



Date Received: On the Processing History page, most of the date controls are either system-filled or disabled. The Date Received is system-filled with the date the amendment was keyed inot the DAVE™ system. If the user has the security privileges to do so, they can update this field. Otherwise the field will be disabled.

Date Mailed: Sometimes requests for amendments are made that cannot be granted. In these cases, a rejection notice is mailed to the individual requesting the change. The Date Mailed is for recording the date on which a rejection notice was mailed to the individual requesting the amendment.

Date Returned: If the notice of rejection is returned by the United States Postal Service as "undeliverable", then a checkmark should be placed in the Returned As Undeliverable checkbox, and the Date Returned field completed with the date on which the rejection letter was returned.

Date Completed: Date Completed will be system-filled with the date the amendment is either approved or rejected.

Action: The Action dropdown list moves the amendment through the approval steps. The first Action is always *Data Entry Complete*. As the amendment is processed, additional actions will be available.

Facts Supported: The Facts Supported field is used to enter information about facts given to support the requested change.

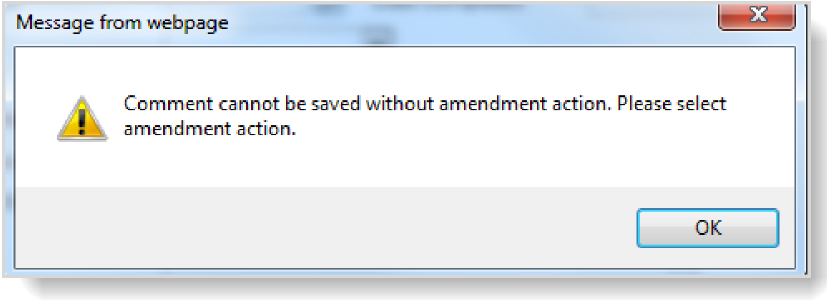
Reject Reason: This dropdown provides a list of reasons as to why an amendment may be rejected. If the amendment is being rejected a reason should be selected from this list.

Other Reject Reason: This is an open text field to collect additional information relevant to the reason the amendment was rejected. Or, if none of the options available in the Reject Reason list apply, the reject reason may be entered manually.

Comment: Any additional comments pertaining to the amendment can be entered here. While it is not necessary to enter comments as part of the amendment process, it is recommended. Detailed comments can provide much needed information to the next user working on the amendment and can help eliminate needless rejections or invalid approvals.

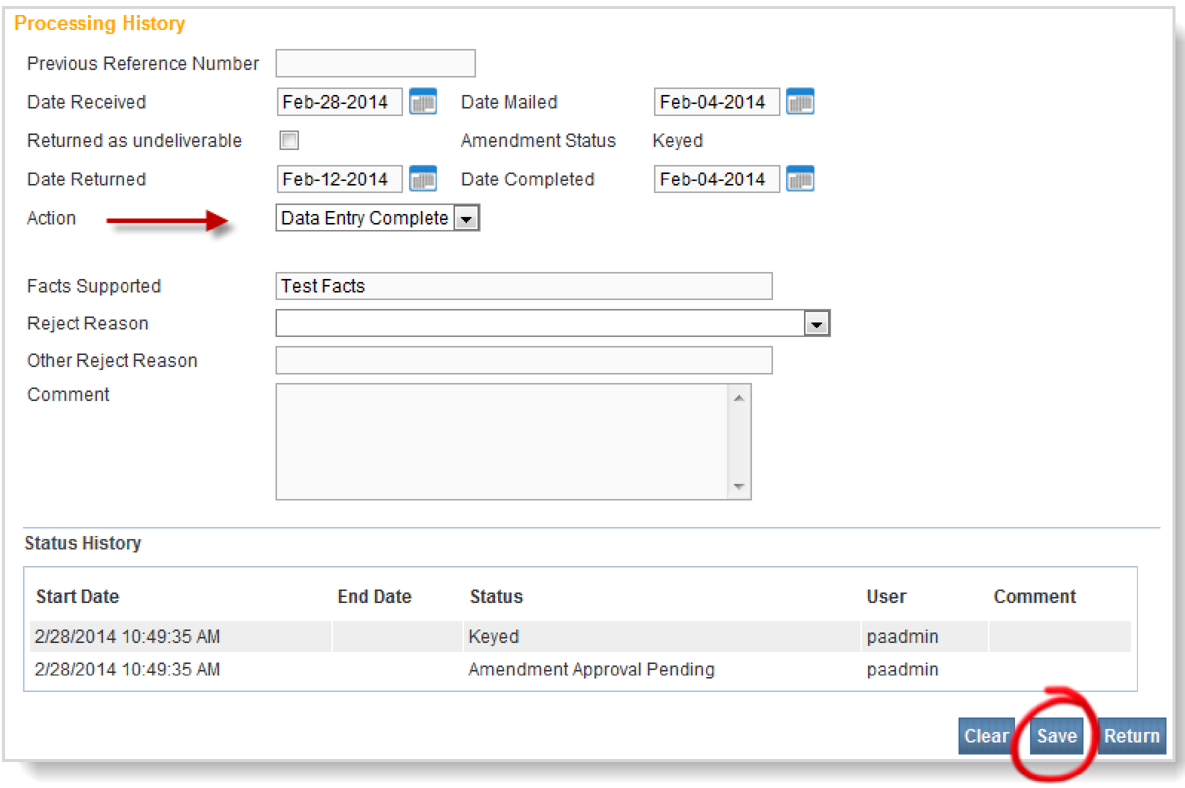
Comments entered in the Comment text entry control are only saved if a selection is made from the Action dropdown.

Upon selection of the Save button, if the user has entered text in the Comment field and there is no amendment Action selected from the dropdown, the following error message is displayed:



Amendment Status: Amendment Status is system-filled and is not a user-editable control. When an amendment request is first entered, the status defaults to Keyed. As the amendment is processed, the status will change accordingly.

3. From the *Action* dropdown menu, choose *Data Entry Complete* then choose *Save*



If the Amendment has been **submitted from a Funeral Home or Medical Facility** the data entry will already be complete and the Amendment status set to either Keyed (Requires Affirmation) or Pending.

Keyed (Requires Affirmation) status indicates that the Amendment has not been affirmed by the Funeral Home or Medical Facility. The Amendment cannot be processed any further until it has been affirmed.

Amendment Approval Pending status indicates that the amendment has been affirmed and is awaiting review and approval or rejection.

Status History

Start Date	End Date	Status	User	Comment
12/20/2016 11:07 AM		Amendment Affirmed	azfdclerk	
12/20/2016 11:02 AM		Pending	azfdclerk	User has affirmed.
12/15/2016 01:38 PM	12/20/2016 11:02 AM	Keyed	azfdclerk	
12/15/2016 01:38 PM		Amendment Approval Pending	azfdclerk	

The Amendment Status changes from Keyed to Amendment Pending Approval

Processing History

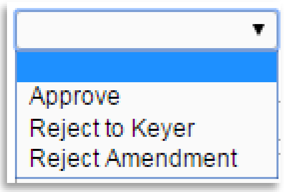
Previous Reference Number			
Date Received	Feb-28-2014	Date Mailed	Feb-04-2014
Returned as undeliverable	☑	Amendment Status	Amendment Pending Approval
Date Returned	Feb-12-2014	Date Completed	Feb-04-2014
Action			
Facts Supported	Test Facts		
Reject Reason			
Other Reject Reason			
Comment			

Status History

Start Date	End Date	Status	User	Comment
2/28/2014 9:59:22 AM		Amendment Pending Approval	paadmin	
2/28/2014 9:04:42 AM		Amendment Approval Pending	paadmin	
2/28/2014 9:04:42 AM	2/28/2014 9:59:22 AM	Keyed	paadmin	

Clear Save Return

4. A new list of values is now available from the *Action* dropdown.



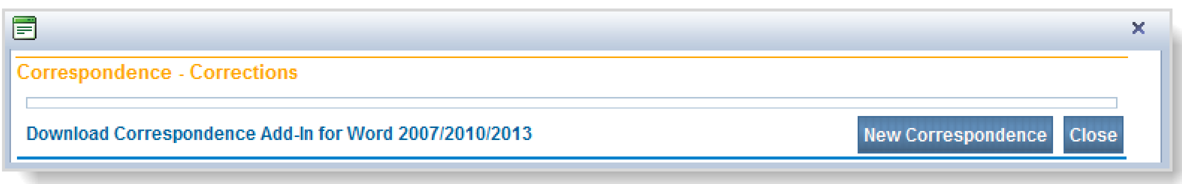
Approve: Selecting Approve will set the amendment status to Approved and save the corrections to the record.

Reject to Keyer: Selecting Reject to Keyer will set the amendment status to Rejected to Keyer. It will also send the Amendment back to the user who originally keyed it for review. The user can then make updates and resubmit the amendment for approval.

Reject Amendment: Selecting Reject Amendment will set the amendment status Rejected and the requested corrections will not be saved to the record.

8.1.7 Amendment Correspondence

DAVE™ provides the ability to generate correspondences related to amendments. Upon selection of the *Correspondence* link from the *Amendments* menu, the *Correspondence* page appears.



The *Correspondence* page provides the same features described in the Correspondence section of this user guide, yet filters the correspondence templates available for selection to include only those correspondences where the correspondence template type is amendment.

Further information on sending and receiving Correspondance is be found in section ***8.6 Correspondence*****.**

8.2 Assign Status

A special status assigned to a record serves as an alert mechanism for the person viewing and/or issuing the record. The ability for a user to view and/or edit a special status is based on assigned security privileges.

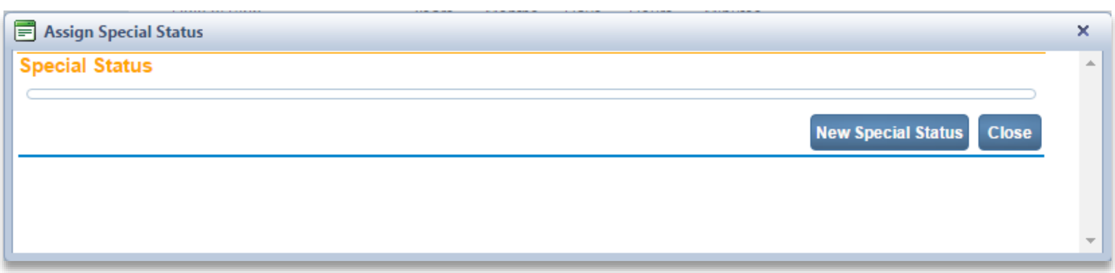
The special status functionality is primarily used to assign or remove one of the statuses referenced in the table below, yet can also be used to assign statuses that are unique to a specific jurisdiction.

Status	Description
Hold	Assigned to prevent the issuance of a certified copy
Void	Assigned when it is determined a registered record is a duplicate or invalid
Abandoned	Assigned when it is determined that a non-registered record has been orphaned. This status is also assigned by the system when a jurisdictionally defined time limit has been exceeded for the submission of a record for registration

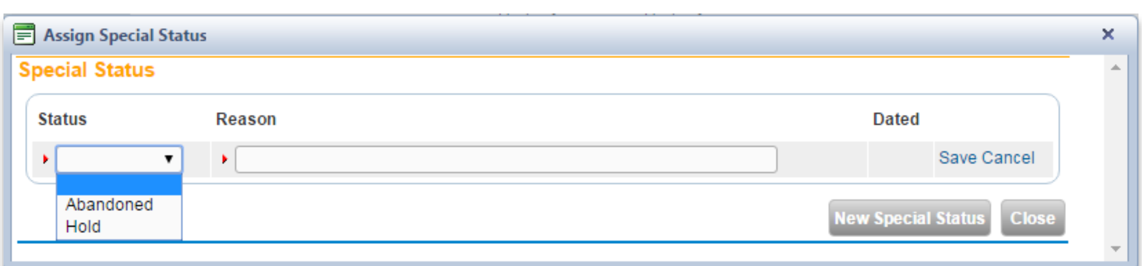
Steps to Assign a Status

1. From the Death or Fetal Death Registration Menu, select *Other Links > Assign Status*.

2. The *Assign Special Status* pop-up window will display. Select the *New Special Status* button.

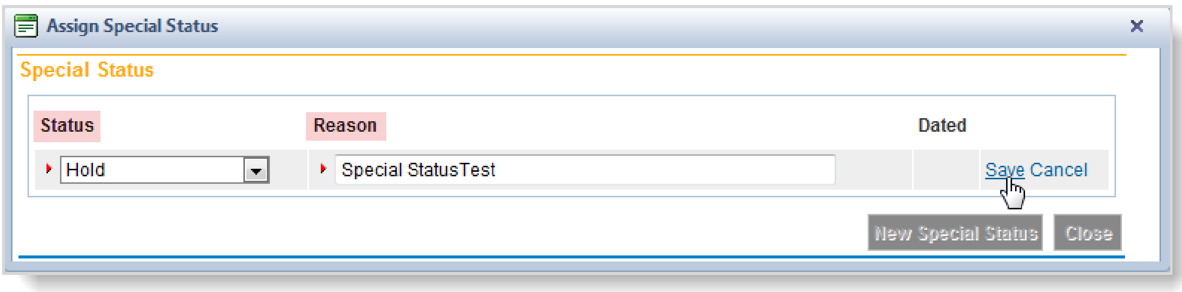


3. Make a selection from the the *Status* dropdown list.

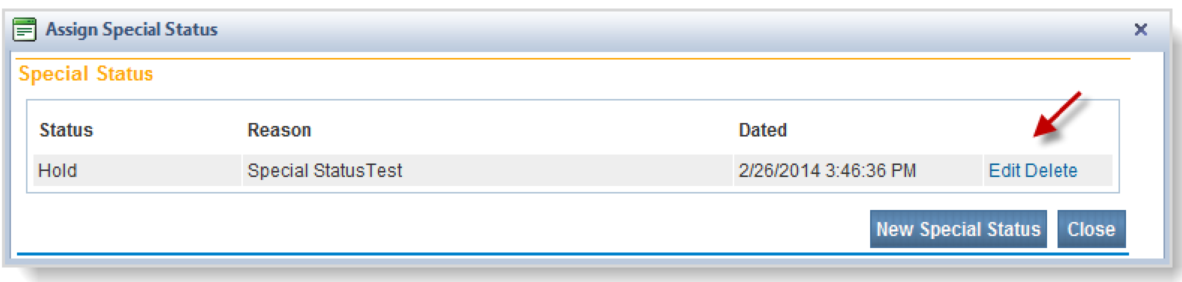


The status of 'Void' is not available until a record is registered. Once registered, the Abandoned status will be removed Status Dropdown.

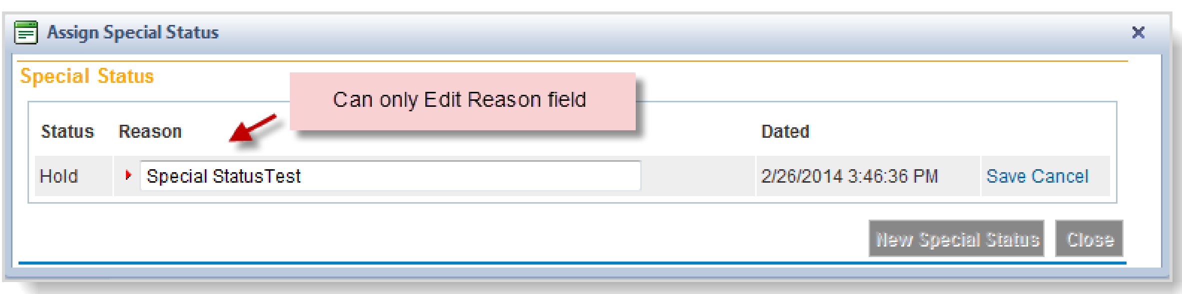
4. In this example, *Hold* has been selected as the status to assign. Notice that Staus and Reason are mandatory fields and must be completed. Once both items are entered, select *Save* to assign the status or *Cancel* to exit without saving the status to the record.



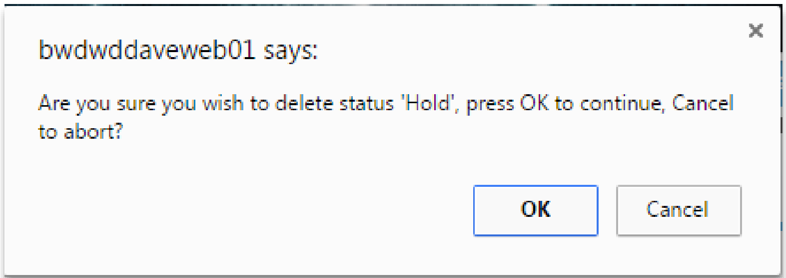
5. Upon selecting the Save button, the *Save* and *Cancel* links are updated to allow the user to *Edit* or *Delete* the currently assigned status.



EDIT: Selecting *Edit* allows the user to edit the *Reason* but not the *Status* itself.



DELETE: Selecting *Delete* prompts the user with a warning message. Select *OK* on the popup to clear the status from the record.

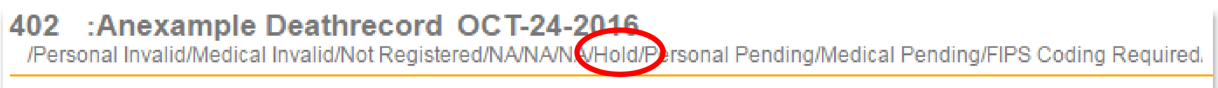


Select the *Close* button to close the *Assign Status* pop-up window.

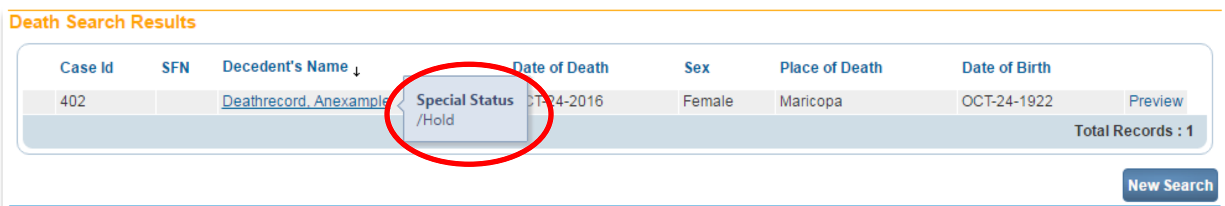
8.2.1 View Assigned Status

Upon assigning a special status to a case, it is viewable:

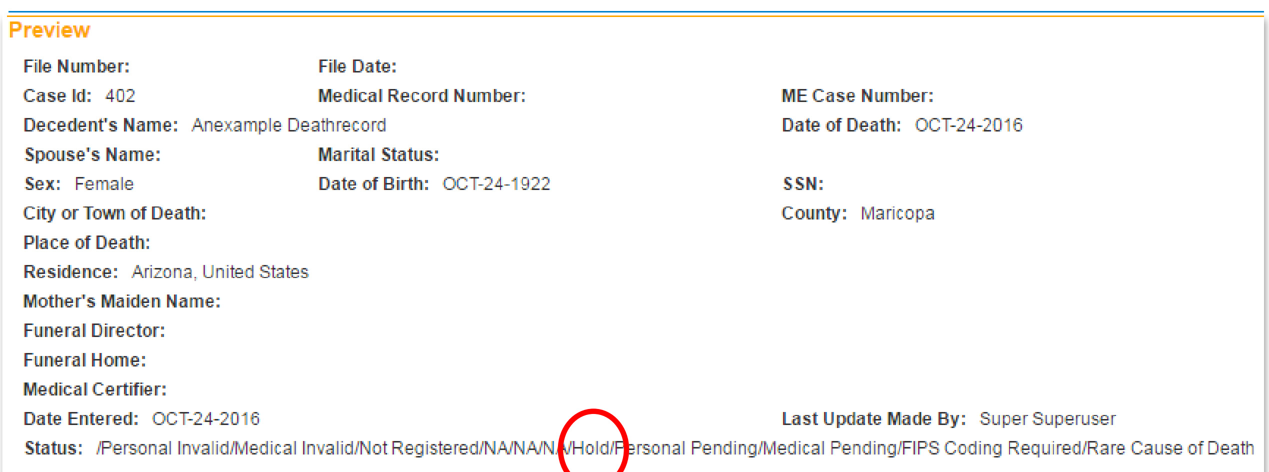
- Within the status bar of the registration:



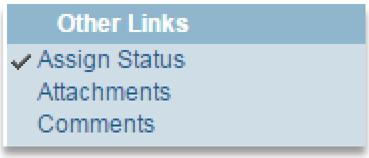
- Within the search results, by hovering the mouse over the *Decedent* or *Fetus Name*:



- Within the Registration or Order Processing record Preview:



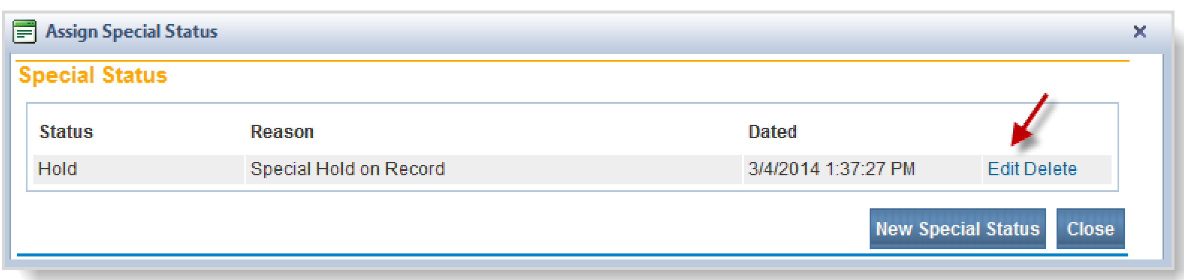
A checkmark is also placed next to the *Assign Status* link in the *Other Links* section of the registration menu to serve as an indicator that a status is assigned to the record.



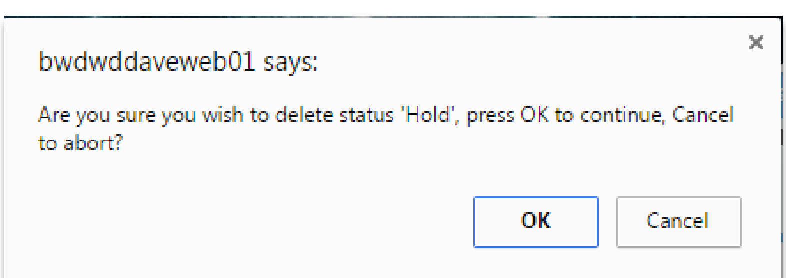
8.2.2 Delete a Status

A user's ability to edit or delete a status is based on the security privileges assigned. To delete the assigned status select the *Other Links* > *Assign Status* menu option.

The Assign Special Status dialog opens. Select the Delete link.



A warning message appears. Select OK to delete the status assigned to the record.



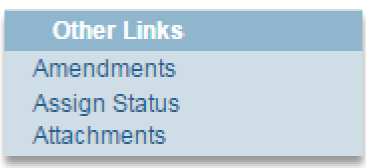
8.3 Attachments

The *Attachments* link allows users with the appropriate security to attach documentation submitted in support of a Death or Fetal Deah registration. This is accomplished by scanning the document to be attached, selecting the *Attachments* link, and then uploading the scanned documentation to be stored within the Death or Fetal Death Registration.

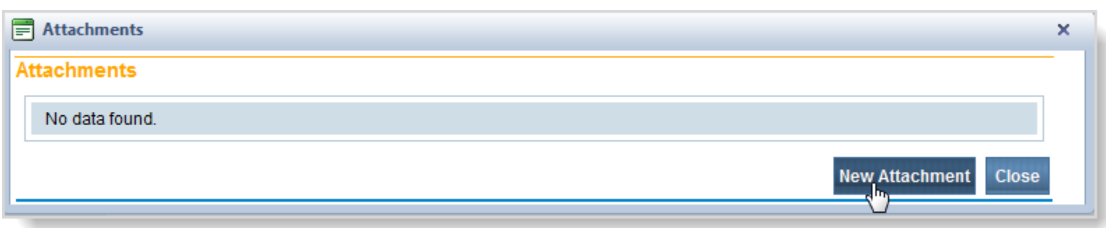
Only users with appropriate security privileges are able to view, edit, and/or delete attachments through the Attachments link.

Steps to Attach Electronic Documentation

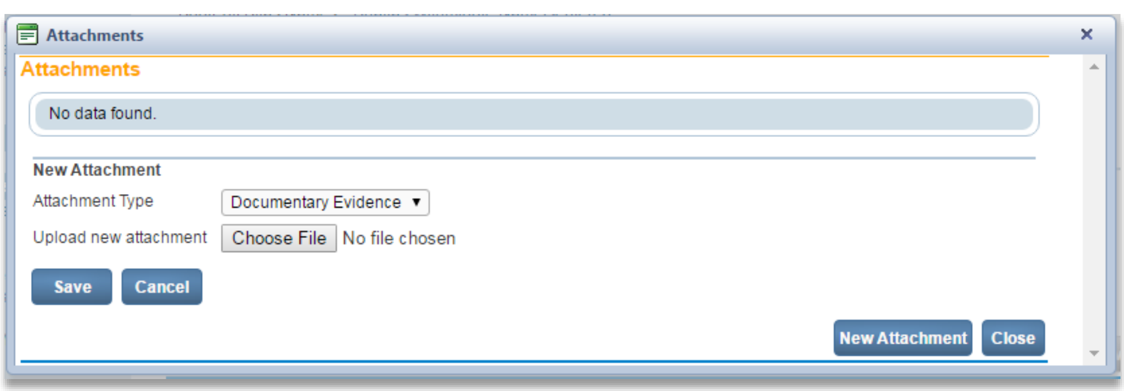
1. From the Other Links menu, select Attachments.



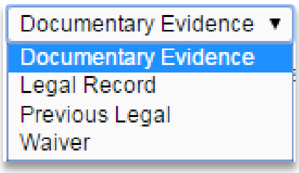
2. The Attachments popup appears. Select the New Attachment button.



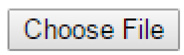
3. The popup expands to display the *New Attachment* section.



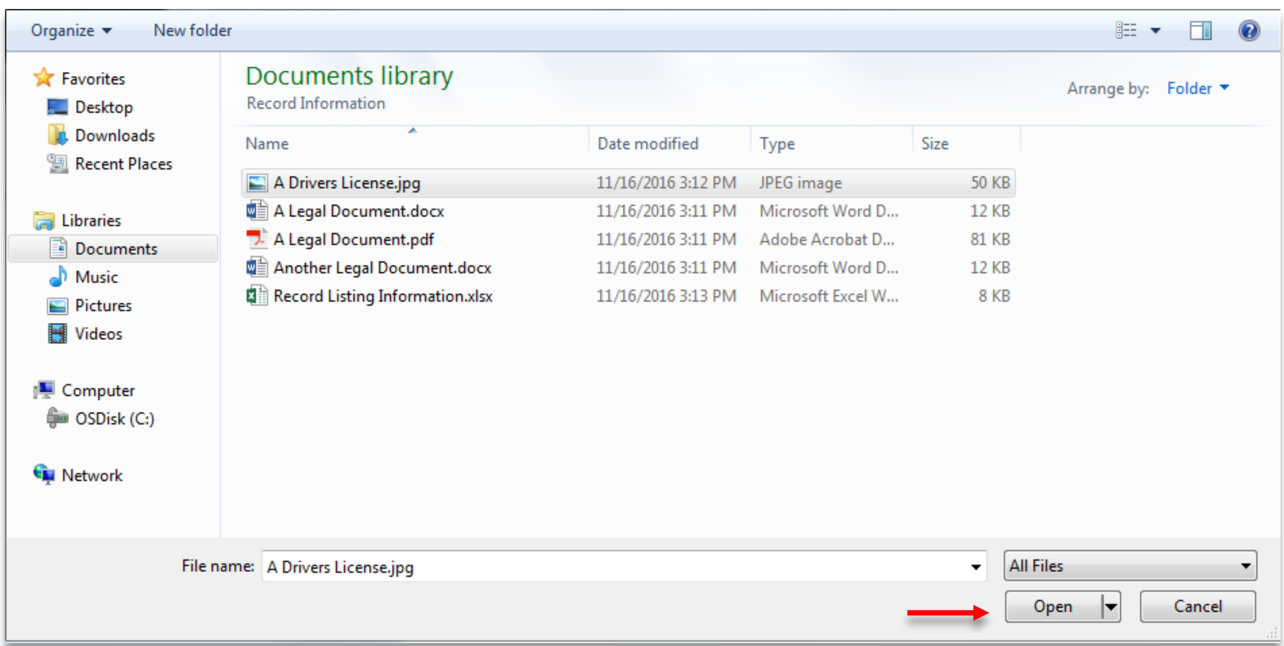
4. Select an Attachment Type from the Dropdown.



5. Select the *Choose File* button to open a Windows dialogue box.

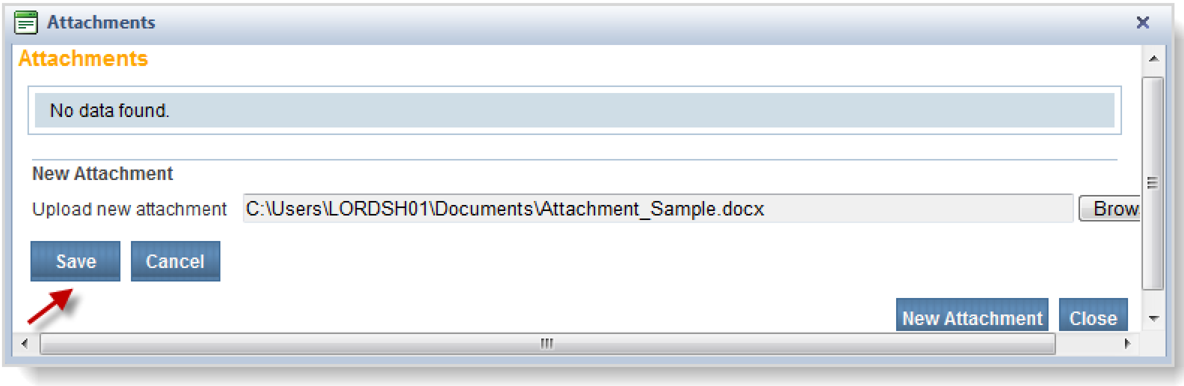


6. Select the document to be attached and select the *Open* button.

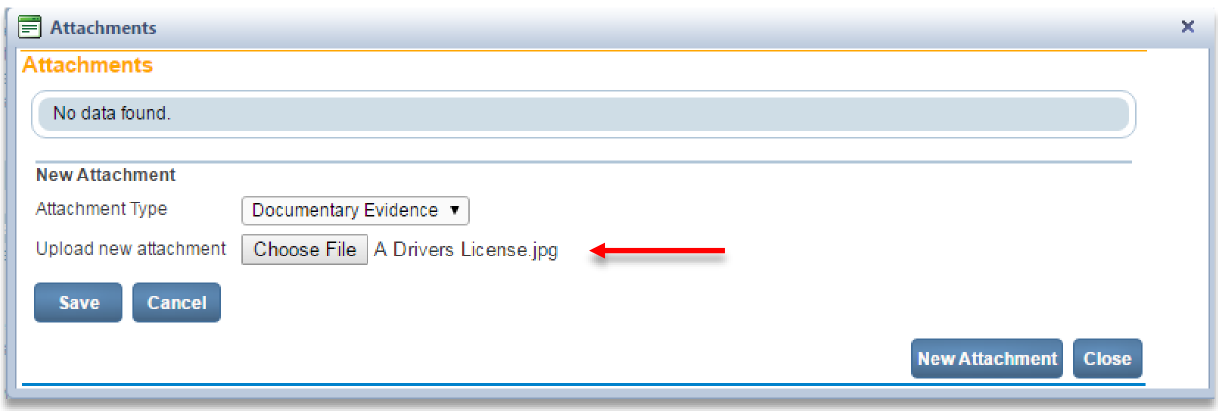


Any file type may be uploaded to the system, however not all DAVE ™users will have access to the same programs on their computer. Therefore it is recommended that only common formats such as MS Office, Adobe PDF, and standard Image file types (.jpg, .png, .tiff, etc.) be attached.

The selected file name and path appear in the *Upload new attachment* field. Select *Save*.



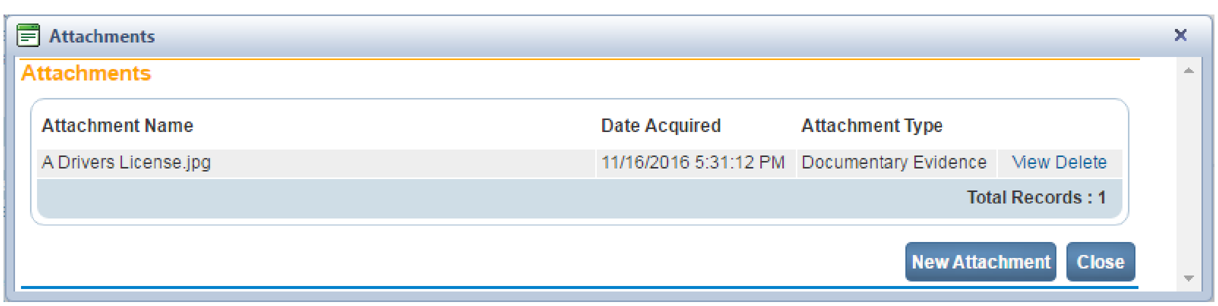
The *Attachments* popup displays the file selected.



7. Select *Save* to attach the selected document.

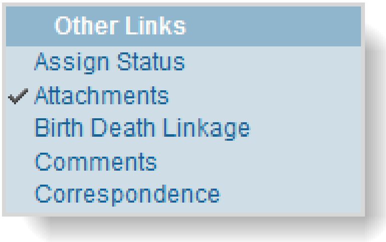
Select *Cancel* or *Close* to close out from the selection options without attaching the document.

The attach document is now uploaded to the Death or Fetal Death record and may be *Viewed* or *Deleted*.



8.3.1 View Attachment

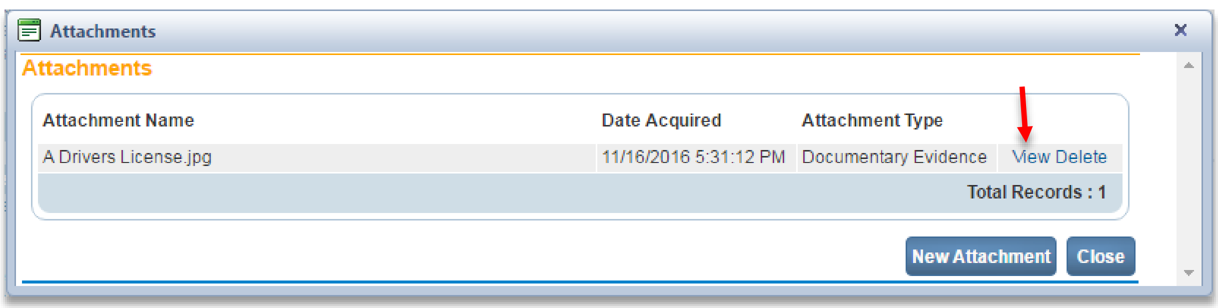
Once a document is attached to a Death or Fetal Death registration a checkmark will be displayed next to the *Attachments* link within the *Other Links* submenu.



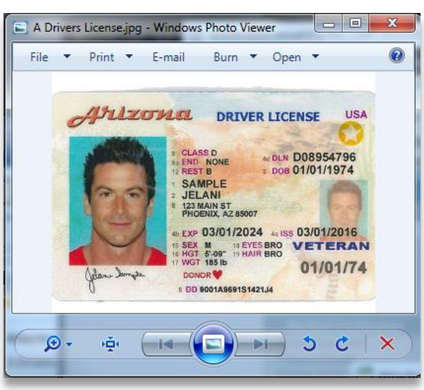
Steps to View Attachment(s)

1. Select the *Attachments* link.

2. The Attachments pop-up will display a list of all attached files. Select *View* next to the attachment you wish to view.



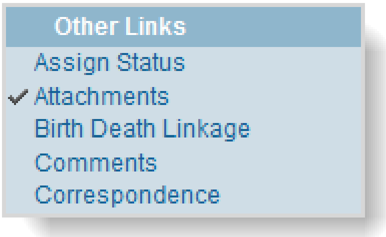
3. The attachment will be download and, depending on the browser, automatically opened to view.



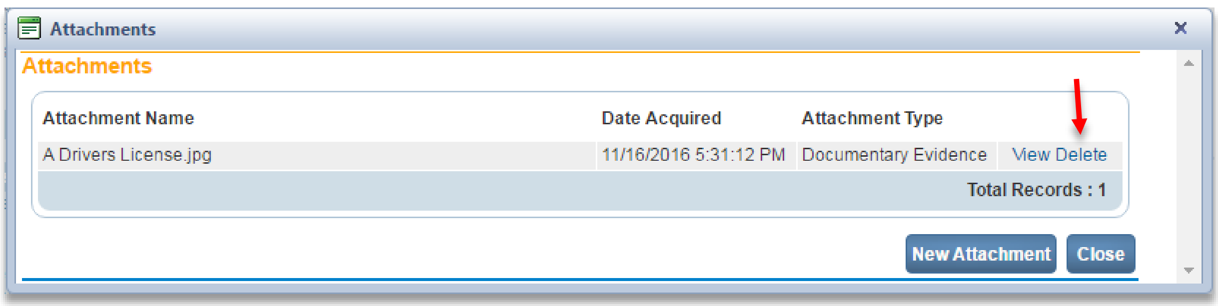
8.3.2 Delete Attachment

Steps to Delete an Attachment(s)

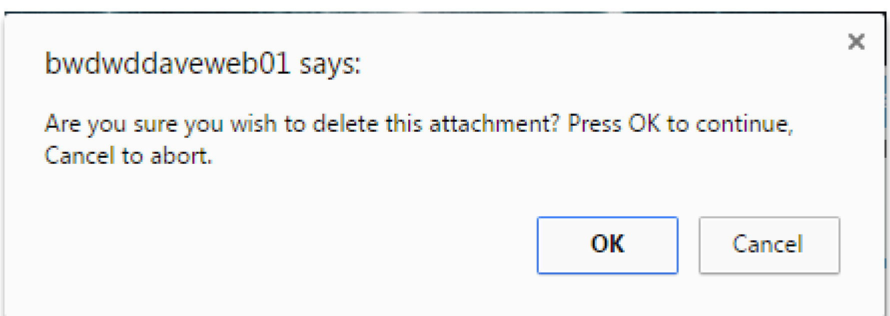
1. Select the *Attachments* link



2. The Attachments pop-up will display a list of all attached files. Select *Delete* next to the attachment you wish to view.



3. A pop-up will be displayed: "Are you sure you wish to delete this attachment? Press OK to continue, Cancel to abort." Select *OK* to delete the attachment.



The *Attachments* pop-up will be displayed and the document will have been removed from the list. If the attachment removed was the only attachment, the checkmark will be removed from the *Attachments* link as well.

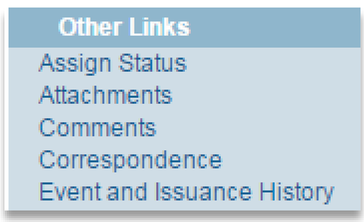
8.5 Comments

Comments can be used to add additional workflow information, detailed information regarding data entered, information associated with the need for amendments and corrections, or reasons for changes made to user profiles and expirations. Entering comments can be very helpful to all users, serving as reminders or instructions to others who might access or work on the case, amendment, or user setup.

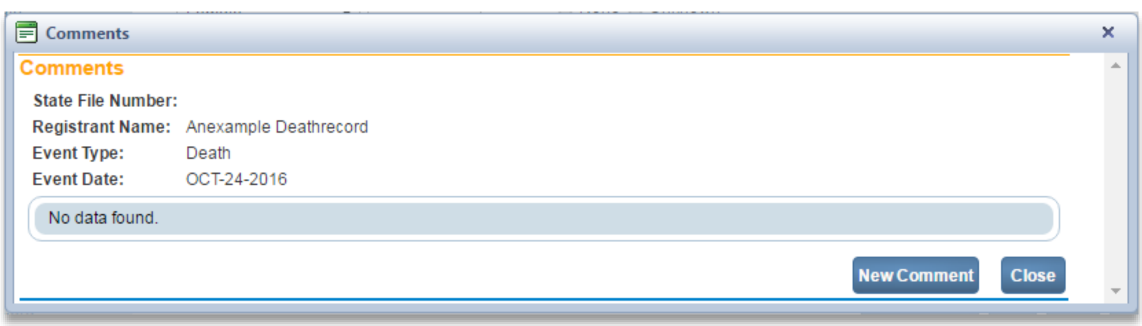
The ability to Edit or Delete comments is based on assigned user security privileges.

Steps to Add Comment

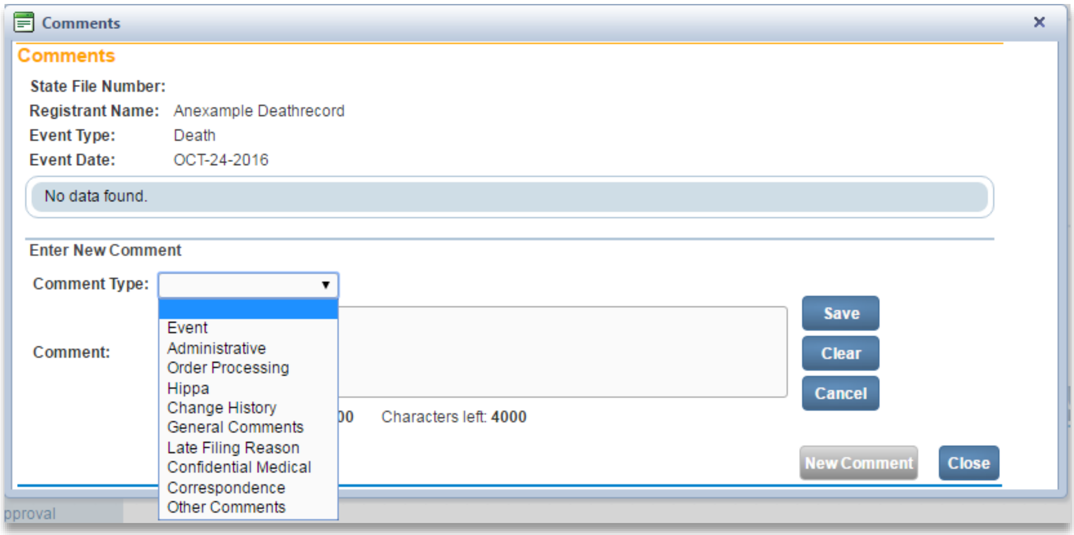
1. Select Other Links > Comments.



The *Comments* popup page appears, displaying the *State File Number* (if registered), *Registrant Name*, *Event Type*, and *Event Date*. This default information is displayed for reference.



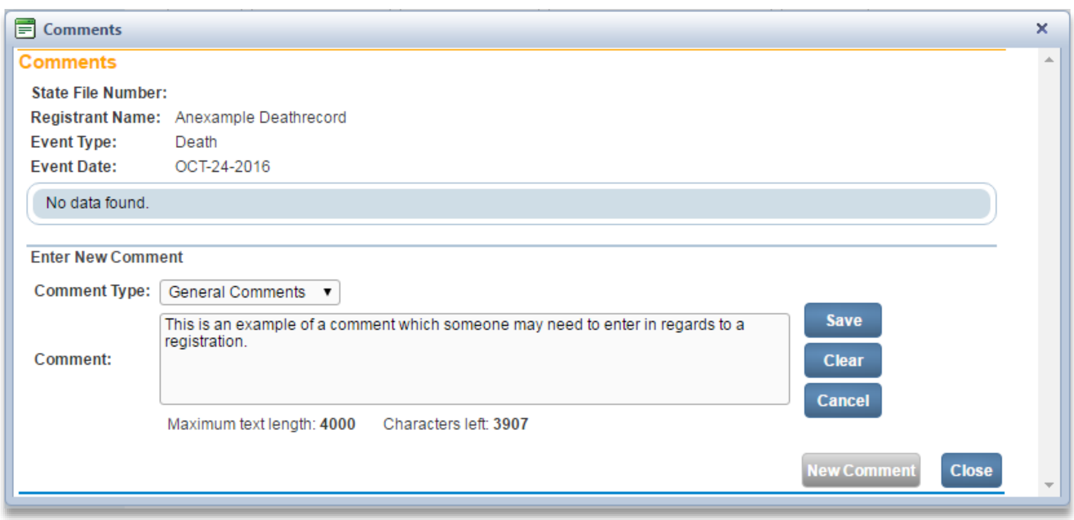
2. To add a new comment to a death case, select the *New Comment* button. The page expands to display the *Enter New Comment* section.



3. Select a *Comment Type* from the dropdown.

Comment types available vary based on user assigned security privileges.

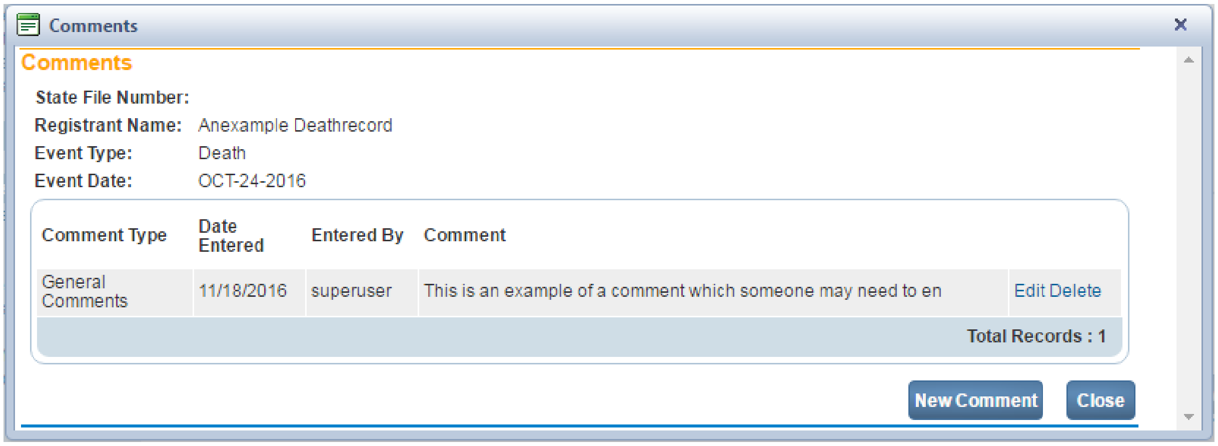
4. Enter the comment in the *Comment* field. Comments are limited to 4000 characters. A running total of the characters remaining is displayed at the bottom of the window.



5. Once a comment has been entered, select the *Save* button.

Select *Clear* to clear the comment text, or *Cancel* to close the comment window.

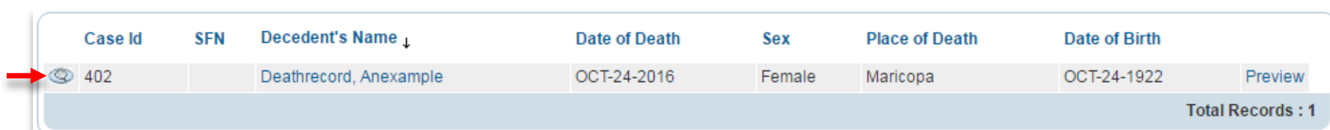
Selecting *Save* will add the comment to the registration. A portion of the comment displays in the Comments window.



Select the *Close* button on the comments popup window. A checkmark appears next to the *Comments* link in the Other Links sub-menu to indicate that a comment has been added to the registration.

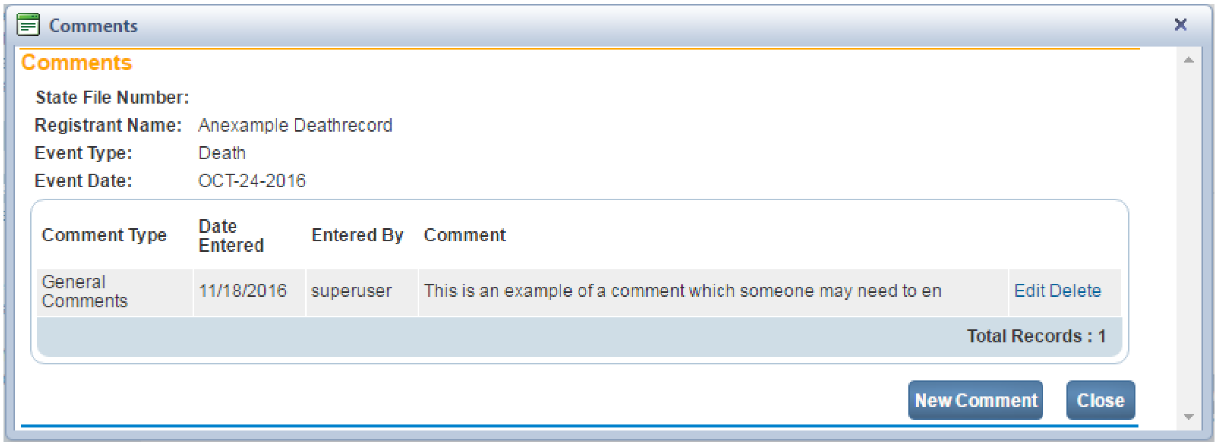
8.5.1 View Comment

If a comment exists on a record a Comments icon will be displayed next to its listing within the *Registration Search Results* and any *Work Queue Listings* the record is included in.



This icon can be selected and the comment pop-up window will be displayed showing the comment(s) which exist on the registration. The user can read any comments that may exist for the selected registration without opening the registration.

This is the same comment pop-up window which can also be accessed from within the registration by selecting *Other Links > Comments*.



Comments

Comments

State File Number:

Registrant Name: Anexample Deathrecord

Event Type: Death

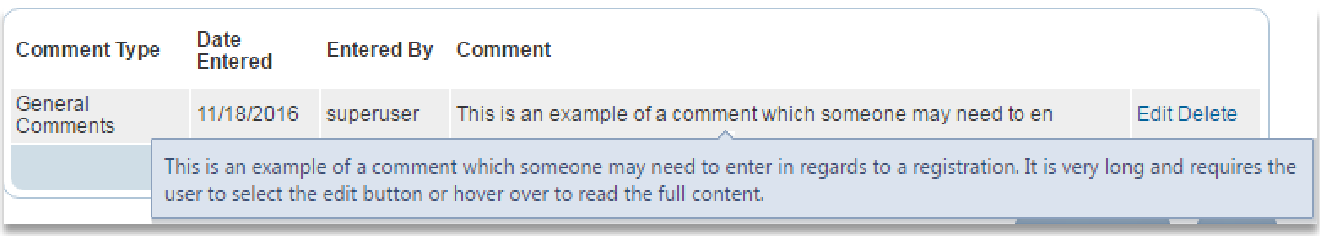
Event Date: OCT-24-2016

Comment Type	Date Entered	Entered By	Comment	
General Comments	11/18/2016	superuser	This is an example of a comment which someone may need to en	Edit Delete

Total Records : 1

New Comment Close

If the comment is too long it will not be fully displayed in the comment table. To see the full text of the comment the user can select the *Edit* link or allow the mouse to hover over the comment text.



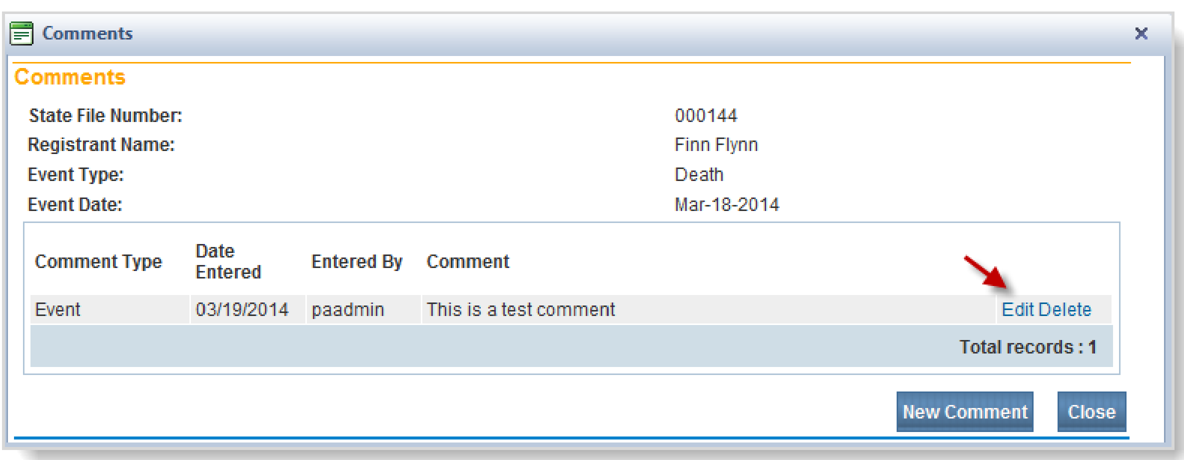
Comment Type	Date Entered	Entered By	Comment	
General Comments	11/18/2016	superuser	This is an example of a comment which someone may need to en	Edit Delete

This is an example of a comment which someone may need to enter in regards to a registration. It is very long and requires the user to select the edit button or hover over to read the full content.

8.5.2 Edit Comment

The ability to *Edit* comments is based on user security privileges.

From within the comment, select the *Edit* link.



Comments

Comments

State File Number: 000144

Registrant Name: Finn Flynn

Event Type: Death

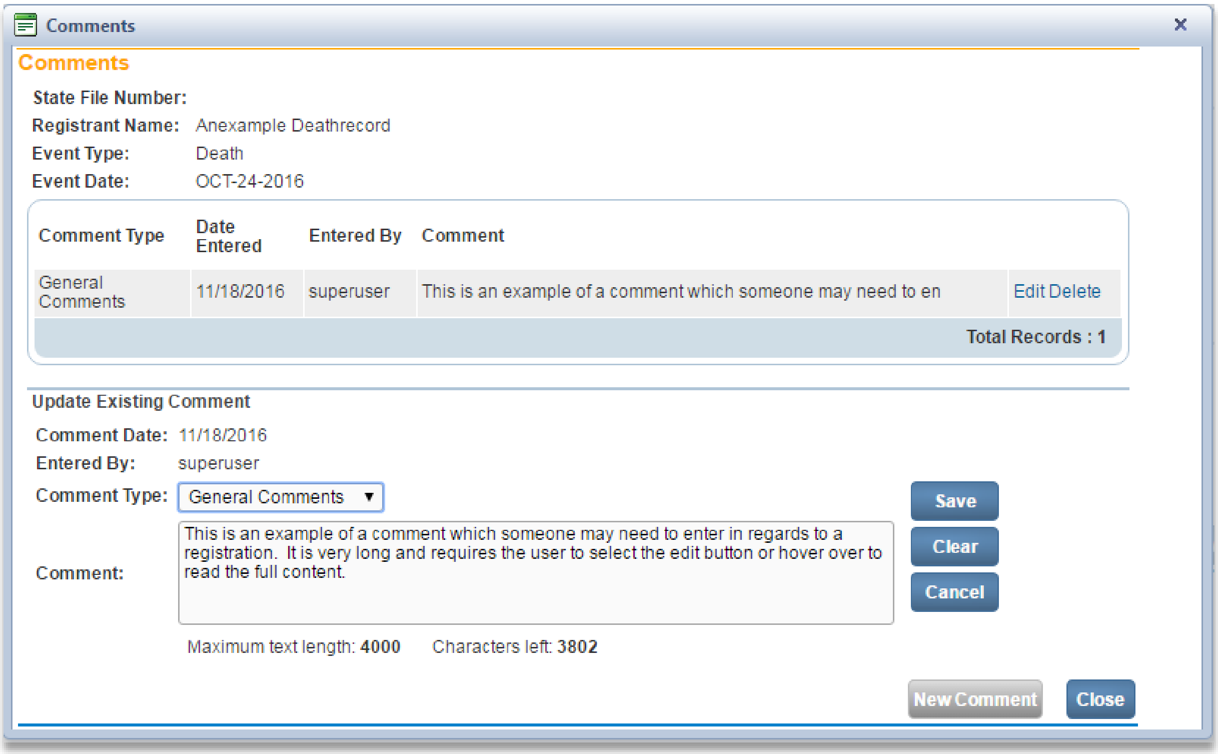
Event Date: Mar-18-2014

Comment Type	Date Entered	Entered By	Comment	
Event	03/19/2014	paadmin	This is a test comment	Edit Delete

Total records : 1

New Comment Close

The page expands to display the *Update Existing Comment* page section. The previously entered comment can then be updated. Once the update is complete select *Save*.

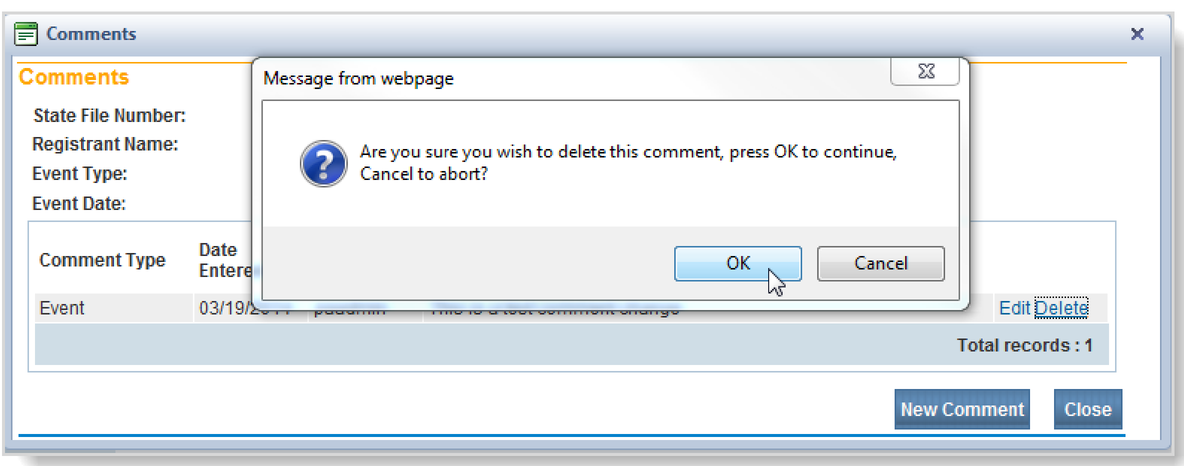


Once comments have been edited, select *Close* to exit the *Comments* popup.

8.5.3 Delete Comment

The ability to *Delete* comments is based on user security privileges.

From within the comment, select the *Delete* link adjacent to the coment. A system message prompts the user to press *OK* to continue or *Cancel* to abort.



Selecting *OK* will remove the comment from the registration. Selecting *Cancel* will return the user to the comment pop-up window without making changes.

Once comments have been deleted, select *Close* to exit the *Comments* popup.

8.6 Correspondence

The registration *Correspondence* feature uses MS Word merge-field templates that can be system-filled with specific information from a registration. For example, a correspondence template may be created to query the medical certifier in regards to the cause of death specified on the record.

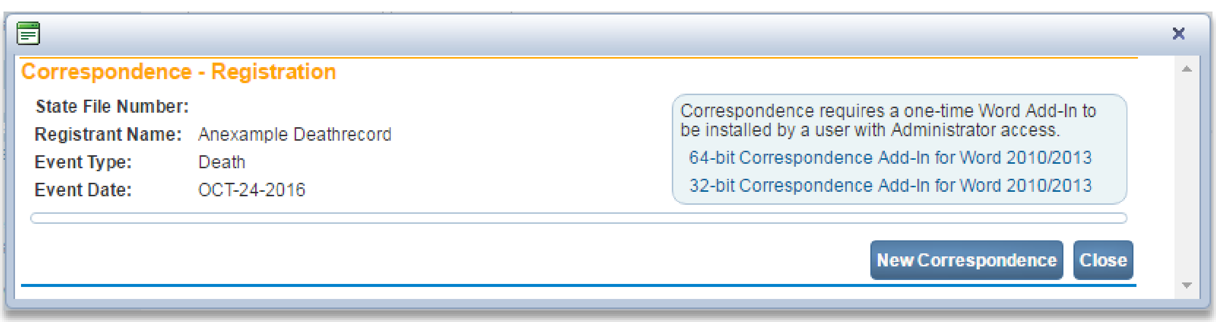
The *Correspondence* feature allows selection of a specific template which is then system-filled with information specific to the registration. A MS Word document is presented to the user who selected the template. Any changes made and saved to the document itself will also be saved with the registration ensuring that all correspondance sent in regards to the registration can be recalled and reviewed if needed.

For information on updating or adding new Correspondence Templates, please refer to the Correspondence Update section in the Table Maintenance User Guide.

Steps to Create Correspondance

1. From the Death Registration Menu, select *Other Links* > *Correspondence*.

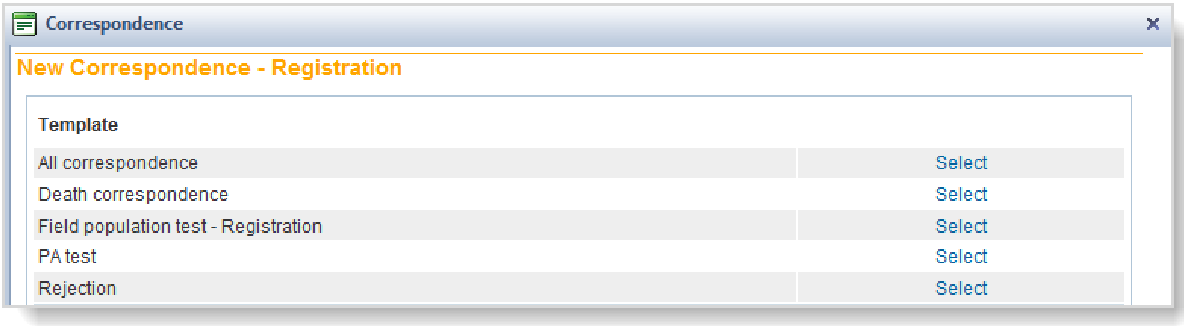
The Correspondence - Registration popup opens.



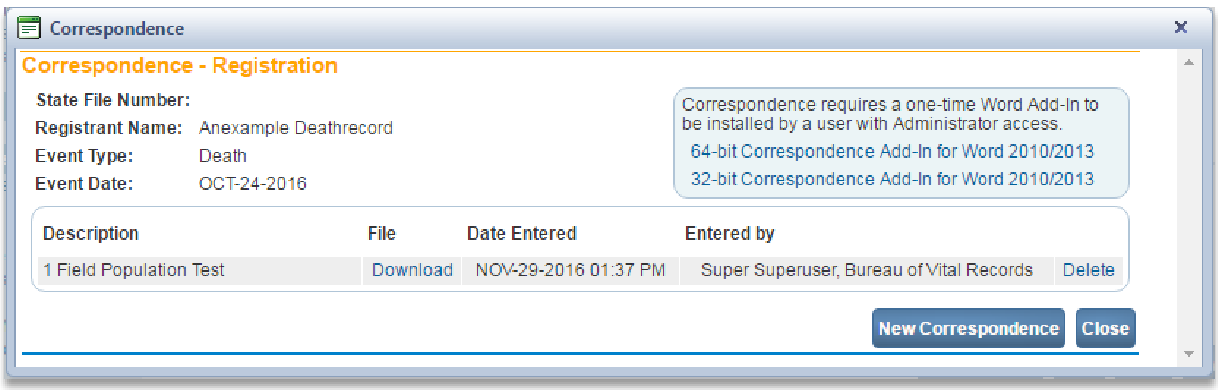
An add-in for MS Word may needed to take advantage of the full functionality of the correspondence feature. See section *8.6.1 Install Correspondence Add-In* for steps to install this add-in.

2. Select the *New Correspondence* button.

The *New Correspondence – Registration* popup displays with a list of the correspondence templates available. .



3. Select the correspondence template.

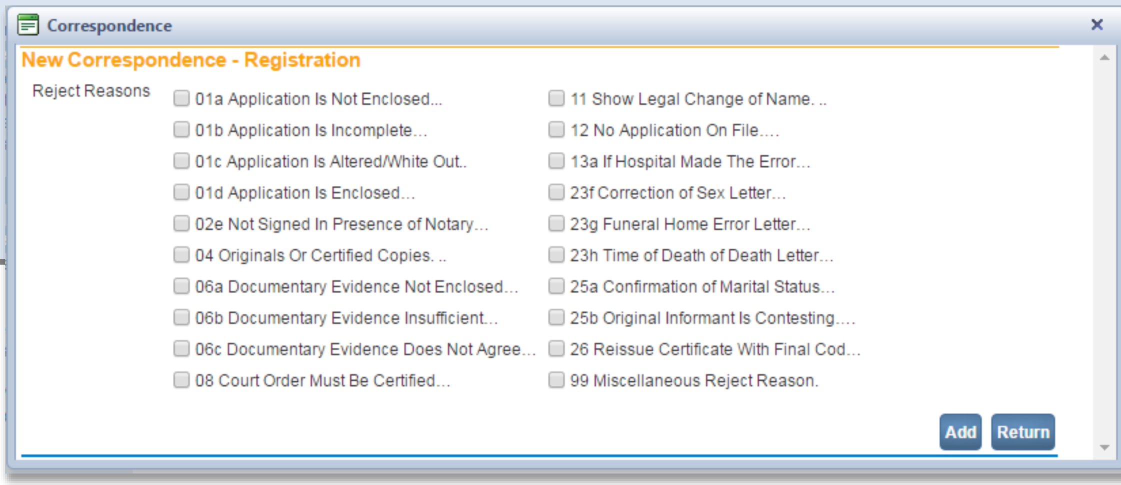


The selected template appears in the data grid on the Correspondence popup.

Reject Reasons

Some Correspondences are created based on a need to reject information submitted for the specified registration. In these instances a listed of Reject Reasons will be displayed for the correspondence.

Use the checkboxes to select a rejection reason to add to correspondence. Multiple reasons may be selected. At least one Reject Reason must be selected before the template will be displayed in the Correspondence data grid.

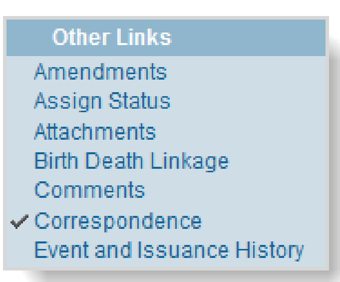


4. From the column labeled 'File' in the Correspondence data grid, select the *Download* link to download an available correspondence template.

Once downloaded, and depending on browser, the selected template may open automatically or the user may be prompted to select to open it.

The MS Word template will then be displayed. The fields specified by the template wll be auto-populated with record-specific data from the specific regsitrtaion. Since it is a MS Word document, depending on the security level set in regards to the template itself, more information can be added, or current information can be edited. The template can then be saved to the registration. Once the correspondence is complete, it can be printed and mailed.

Once correspondence has been added to a record, select the Close button on the correspondence popup. A checkmark appears next to the Correspondence link in the Other Links sub-menu.



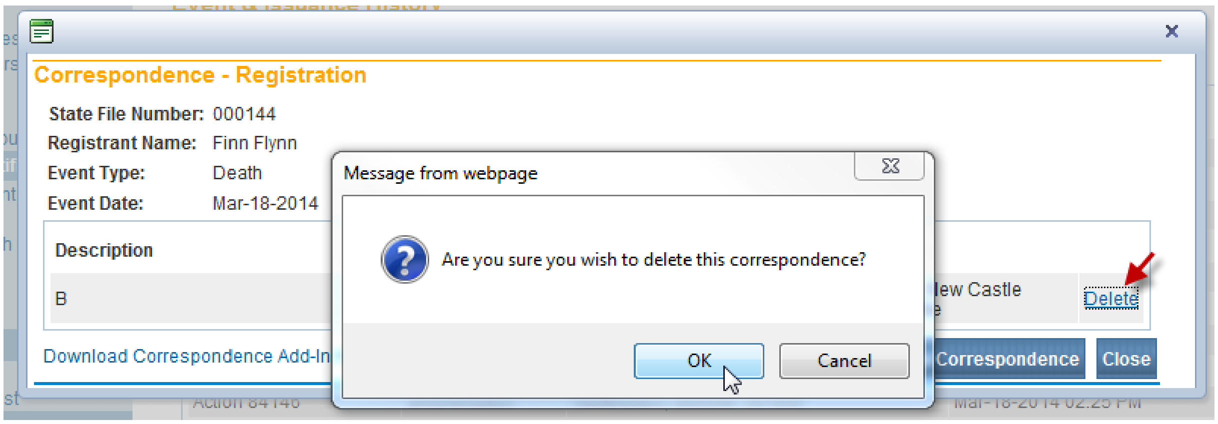
8.6.1 View Correspondence

To view correspondence that is currently attached to a registration, select the *Correspondence* link from the *Other Links* submenu.

A data-grid list of correspondence(s) currently attached to the registration will be displayed. Select *Download* to view any of the correspondence documents.

8.6.2 Delete Correspondence

If a Correspondence should no longer be associated with a record, or a mistake was made, select the Delete link beside that correspondence.



Select OK on the popup. The Correspondence will be removed from the case.

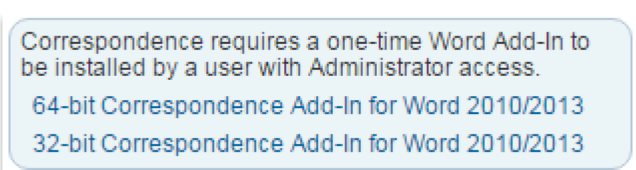
8.6.3 Install Correspondence Add-In

A one-time install of a MS Word Add-In is needed for the full features of the system correspondence feature to be utilized.

A system administrator may be needed to authorize the install.

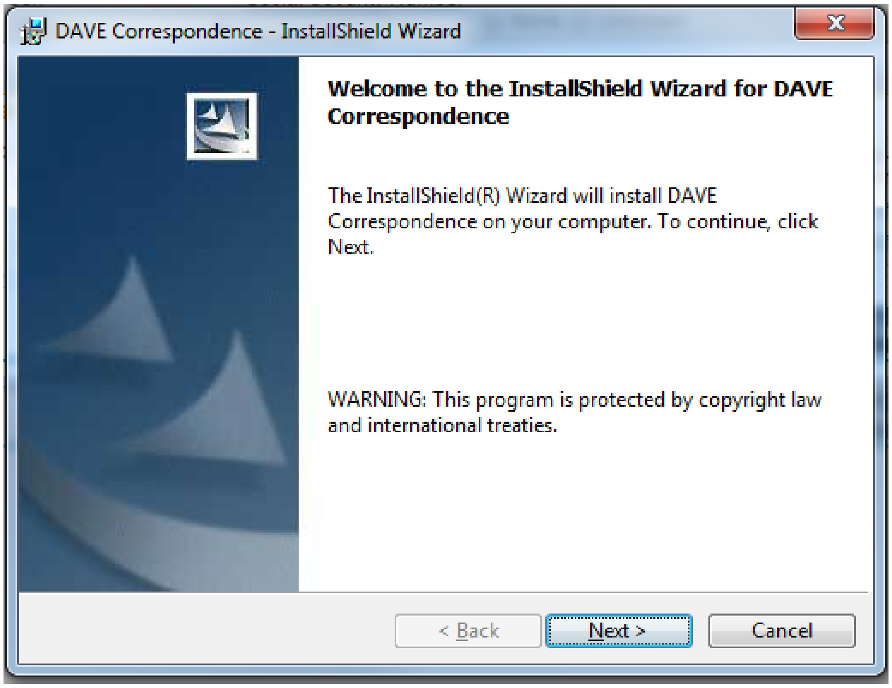
To Install Add-In

1. From the Correspondence pop-up select either the 64 or 32 bit 'Correspondence Add-In for Word' link.



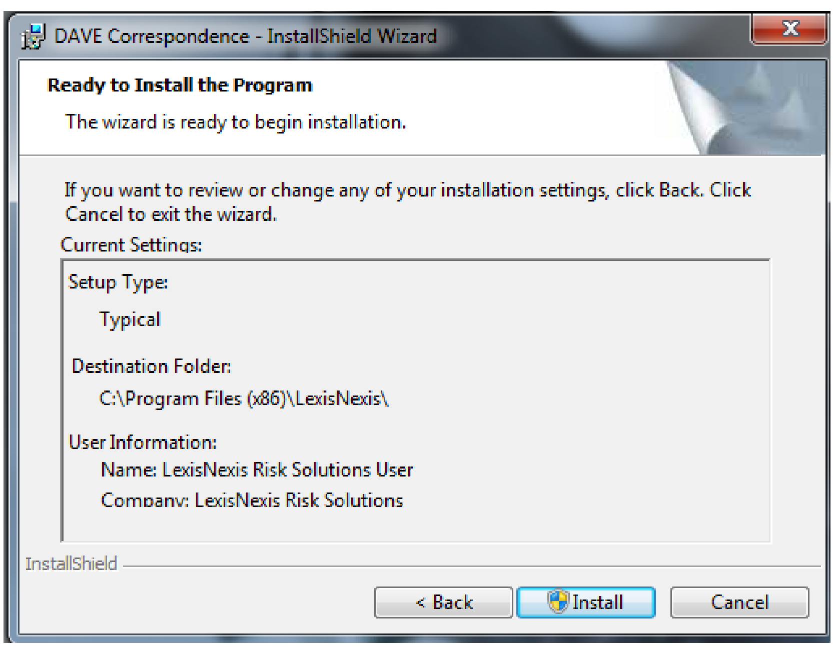
Depending on the browser being used, the *CorrespondenceSetup.exe* file will either automatically be downloaded or the user will be prompted to select to either 'save' or 'run' it directly.

2. Run the *CorrespondenceSetup.exe*



The DAVE Correspondence install wizard will be displayed.

3. Select *Next*



4. Select *Install*

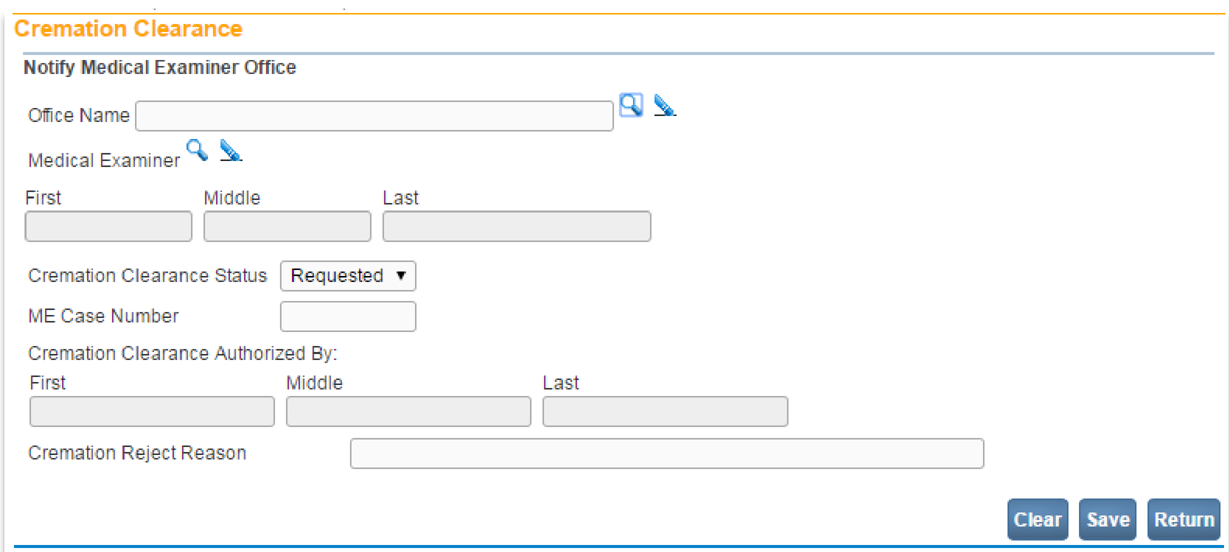
The setup wizard will step through the installation process. Upon completion, select *Finish* to close the install wizard.

8.7 Cremation Clearance

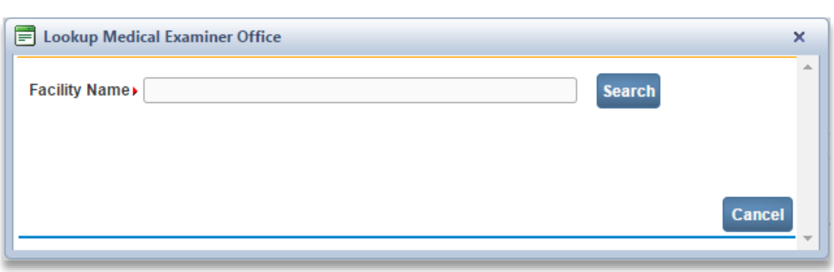
Cremation Clearance approval is required in all cases in which the method of disposition, for a death or fetal death, is cremation. In these cases a Funeral Director will send a request for cremation clearance authorization to the Medical Examiner or Tribal Authority responsible for the county in which the death occurred. In some cases, a Medical Examiner may start the death or fetal death record and can pre-authorize cremation clearance.

8.7.1 Request Cremation Clearance

From the **Other Links** menu, within either a Death or Fetal Death record, select the **Cremation Clearance** link. The *Cremation Clearance* page will be displayed.



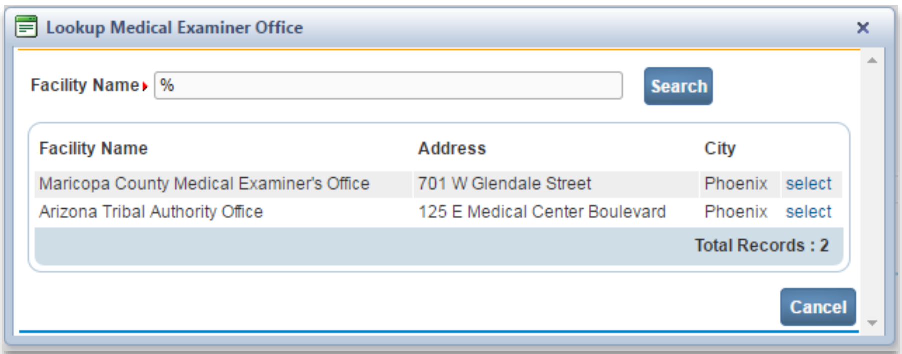
Office Name: The LOV lookup control must be used to search for and select a Medical Examiner office to send the Cremation Clearance request to. Once selected the *Lookup Medical Facility* pop-up will be displayed:



The *Lookup Medical Examiner Office* is filtered by County of Event, only those Medical Examiner or Tribal Authority offices which serve the County of Event will be returned in the Search Results.

If only one Medical Examiner Office is associated to the County of Event, this office will auto-fill in the *Office Name* field and the LOV lookup controls shall be hidden.

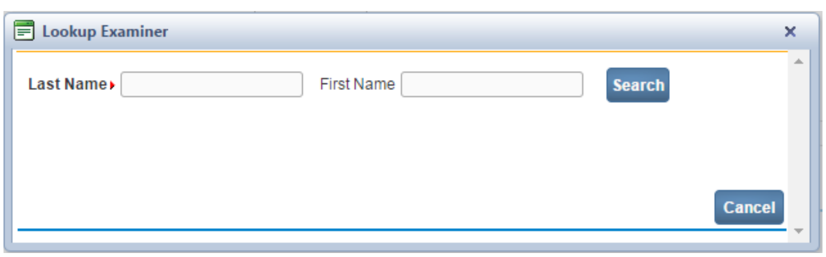
Simply enter a % in the Facility Name field and select search to return a list all available Medical Examiner or Tribal Authority offices which serve the County of Event.



Select the Facility from the Search results.

Medical Examiner: If the Medical Examiner who will be reviewing the record and processing the Cremation Clearance Request is not known, then this field can be left blank. Medical Examiner name is not required to send the Cremation Clearance Request. If the Medical Examiner is known, select the lookup control next to Medical Examiner.

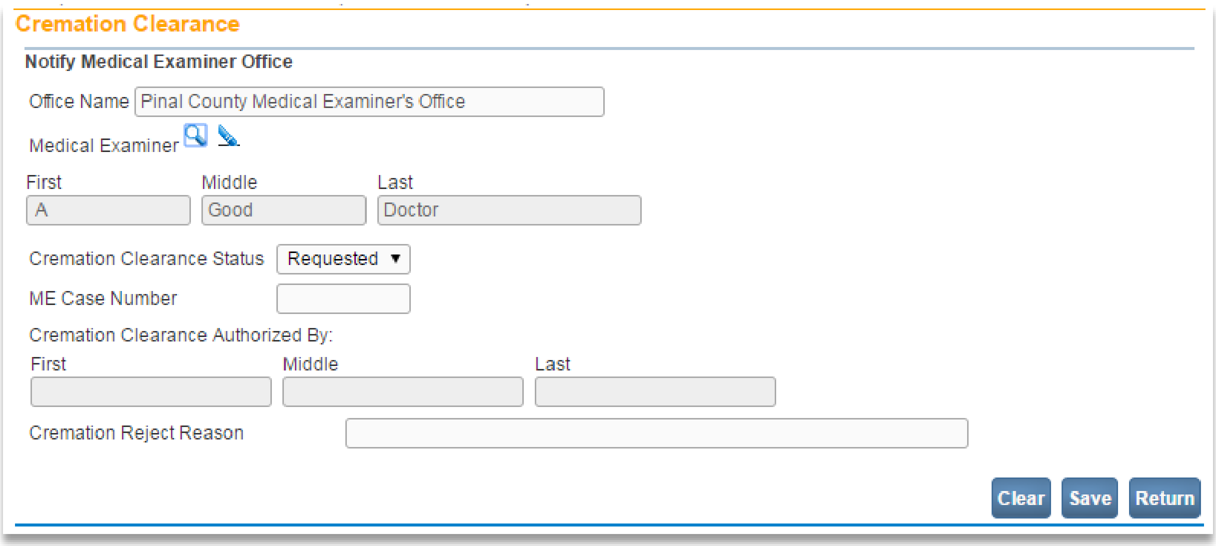
The Lookup Examiner pop-up will be displayed:



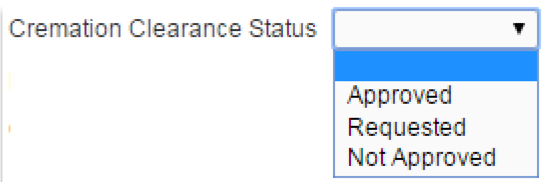
Enter the Last Name of the Examiner you wish to send the request to and select Search.

% Wildcard can be used in the *Lookup Examiner* Last Name and First Name fields.

Select the name of the Medical Examiner the Cremation Clearance Request should be sent to and it will be populated on the Cremation Clearance page.



Cremation Clearance Status: The Status should be selected from the dropdown.



For Funeral Home and State and County users, the only option available will be Request. As these user make request of the Medical Examiner to review and approve Cremation Clearance.

For Medical Examiner and Tribal Authority users the options available will be Approved and Not Approved.

ME Case Number: If known, the ME Case number should be entered into this field.

Cremation Clearance Authorized By: The First, Middle, and Last Name fields for the *Cremation Clearance Authorized By* will be system filled based on the Medical Examiner who Approves or does Not Approve the request for cremation.

Cremation Reject Reason: If the Medical Examiner selects Not Approved from the *Cremation Clearance Status*, the Cremation Reject Reason is required to be entered. What should be entered is the reason why the Medical Examiner chose not to approve the request.

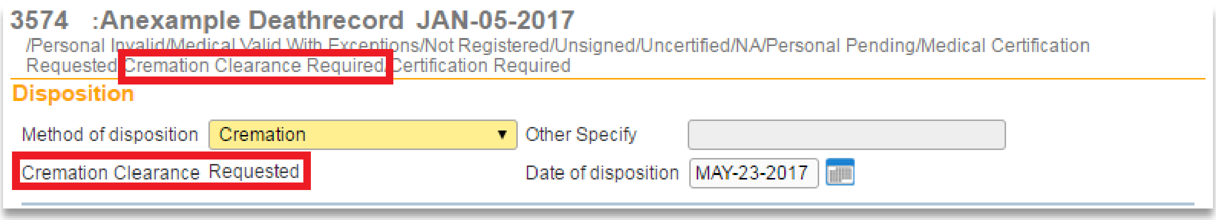
There are three action buttons in the bottom left of the Cremation Clearance page.

Clear: Selecting this button will clear all entries made on the page.

Save: Selecting this button will save and apply the Cremation Clearance status to the record.

When Cremation Clearance Status' are saved they are displayed on the Disposition page, under the selected Method of Disposition.

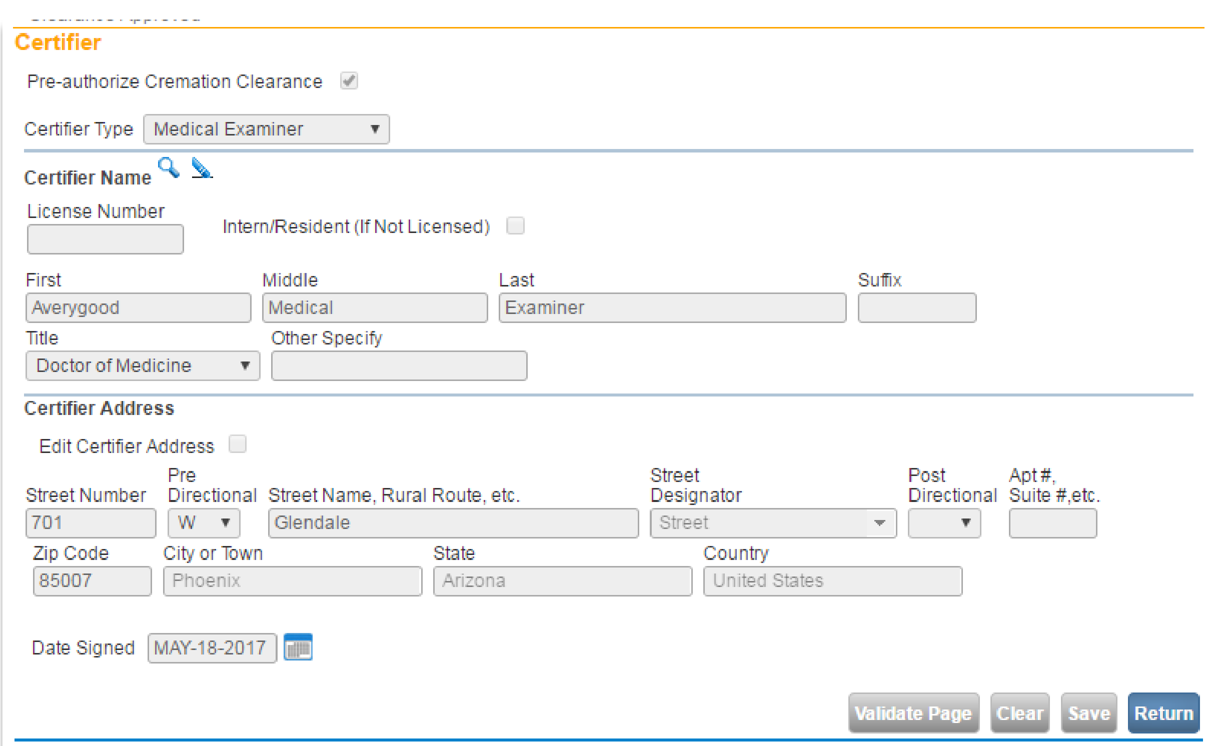
As well, the status is also displayed in the Status Bar of the record.



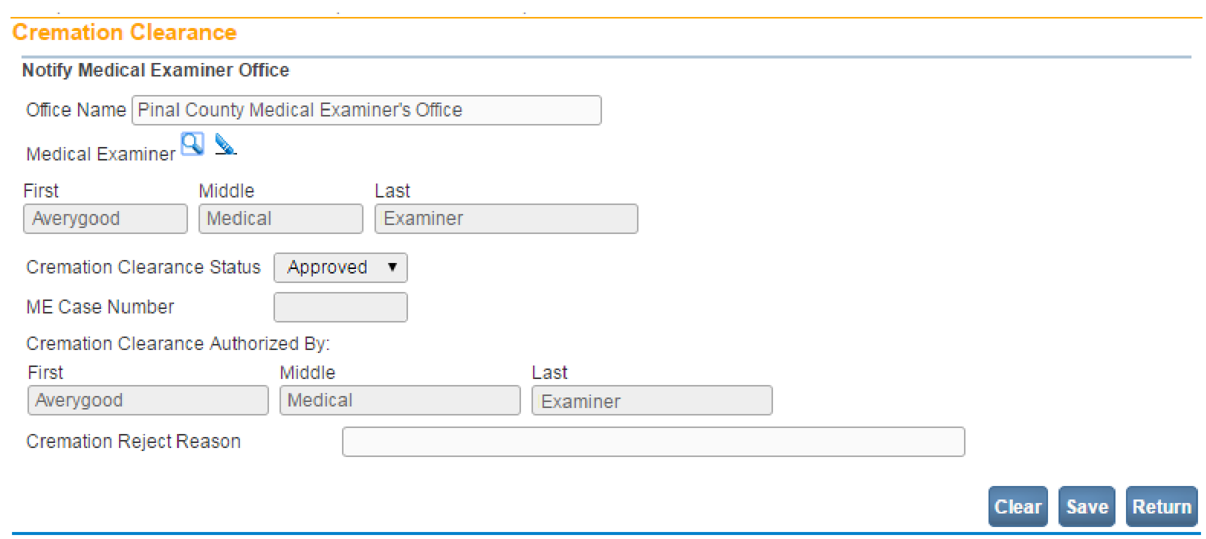
Return: Selecting this button will return the user to the previous Death or Fetal Death registration page they had taken action on.

8.7.2 Pre-Authorize Cremation Clearance

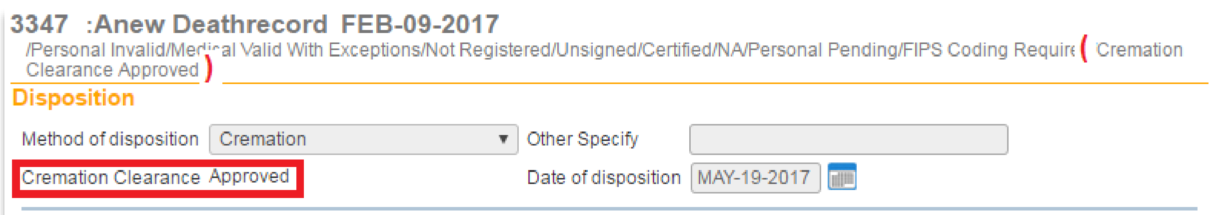
In some cases the Medical Examiner will initiate the Death or Fetal Death record in DAVE™. In these cases the Medical Examiner can opt to pre-authorize cremation clearance by selecting the *Pre-Authorize Cremation Clearance* checkbox on the *Certifier* page.



Once selected, if the Method of Disposition is a type that requires cremation, then the Cremation Clearance page will be displayed. All fields will be system-filled with the Medical Examiner information who pre-authorized the cremation clearance.



As well, the Cremation Clearance Status shall be set to Approved. The Approved status will be displayed on the *Disposition* page, under the *Method of Disposition*, and within the Status Bar of the record itself.



All fields on the *Cremation Clearance* page will be greyed out and disabled as there is no processing that needs to occur.

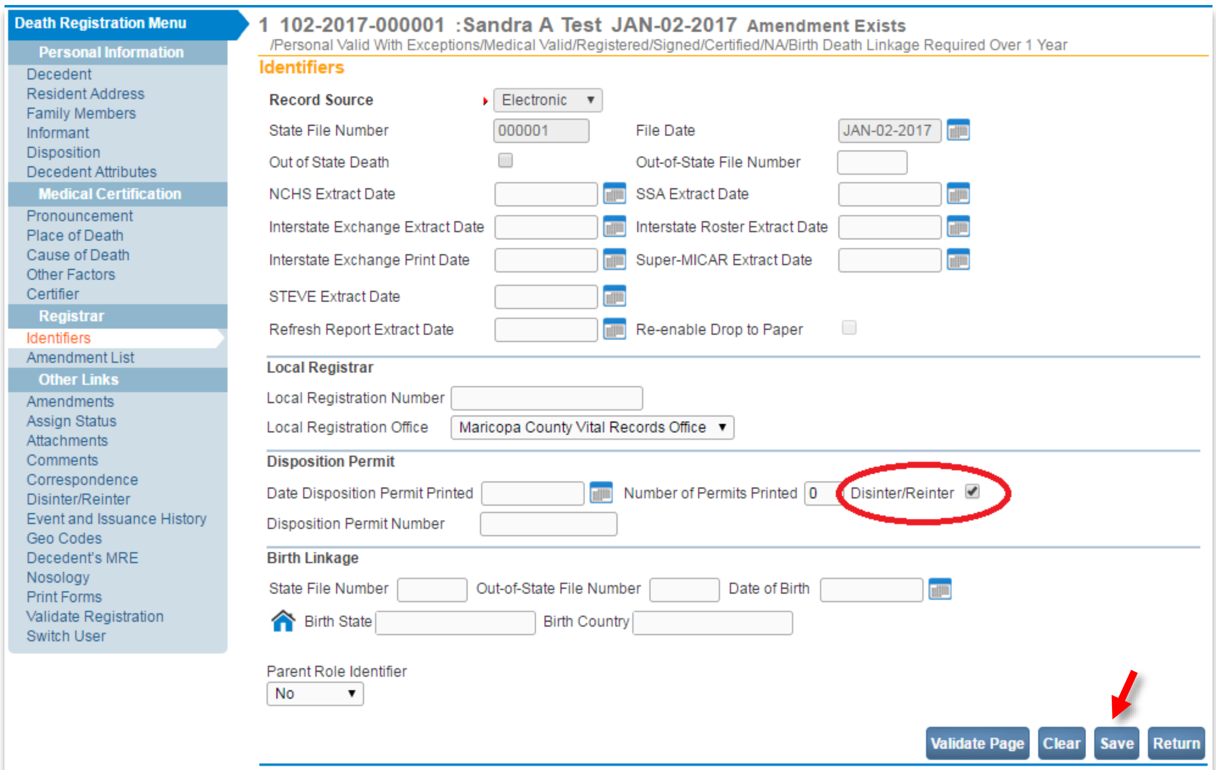
8.8 Disinter-Reinter Permit

In some instances the decedent remains may be disinterred for examination and then reinterred. For these instances DAVE™ includes disinter-reinter permitting functionality.

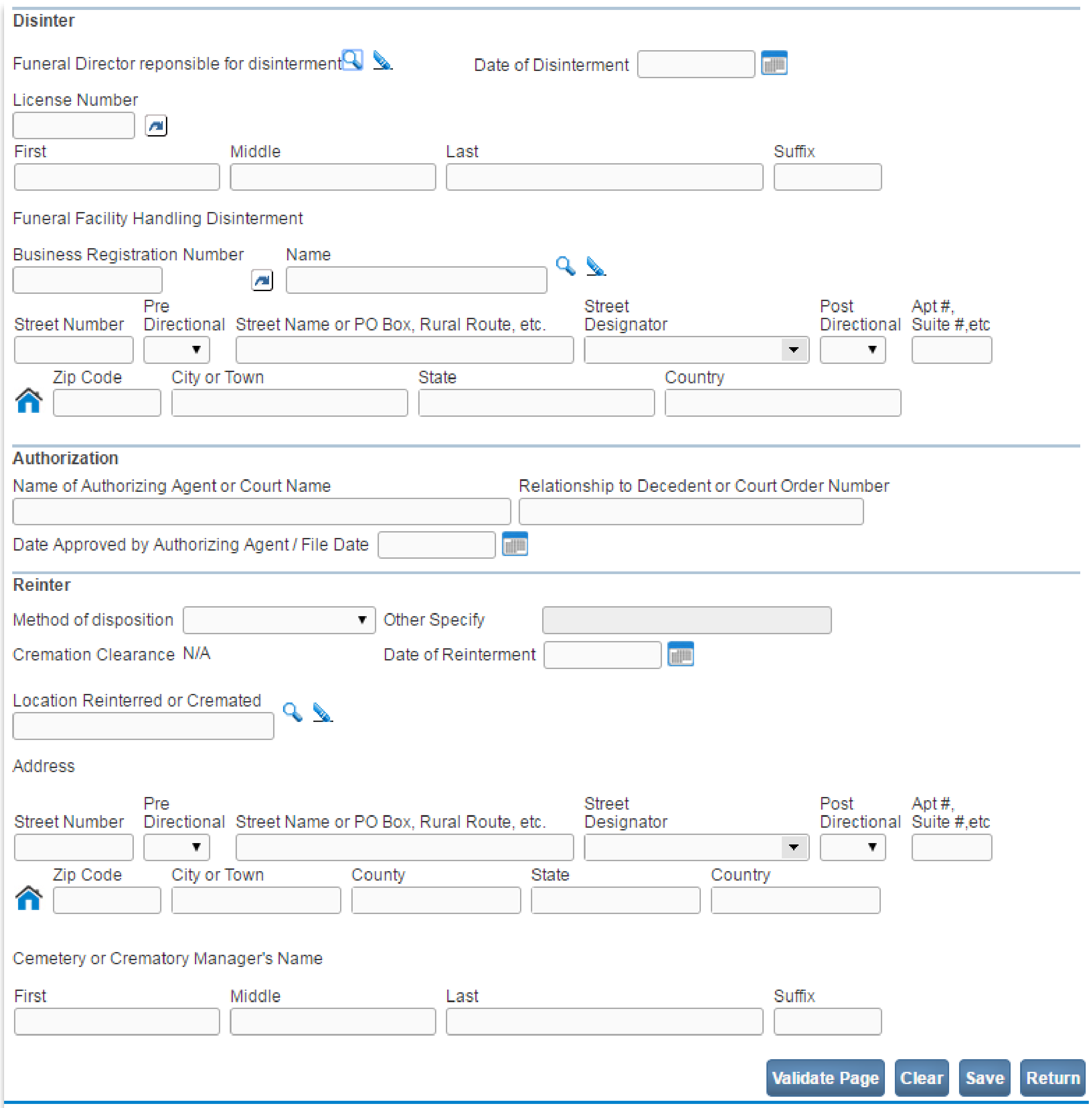
The disinter-reinter permit is created from within a registered death registration record within DAVE™. The information within the permit is completed by State or Local users who can print the permit themselves or select to send the permit to the Funeral Home handling the disinterment process to print.

8.8.1 Create Disinter-Reinter Permit

To create a disinter-reinter permit first the *Disinter/Reinter* checkbox must be selected on the Identifiers page. Once the checkbox selection is made the *Save* button is selected.



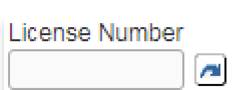
The *Disinter/Reinter* link will be displayed in the *Death Registration* menu within the *Other Links* section. Select this link to display the *Disinter/Reinter* page.



Funeral Director Responsible & Funeral Home Handling Disinternment: There are three ways to complete the Funeral Director/Funeral Home information.

1. Manual entry of each item;
2. The Funeral Director *License Number* and auto-populate icon; or
3. The standard LOV Lookup controls

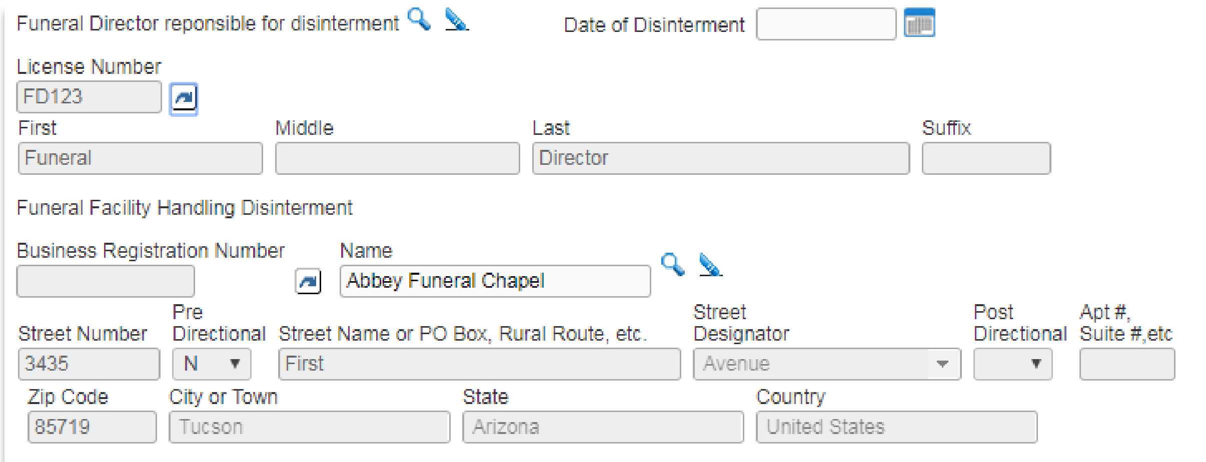
Steps for using Funeral Director License Number to complete



1. Enter a Funeral Director's License Number

2. Select the auto-populate icon

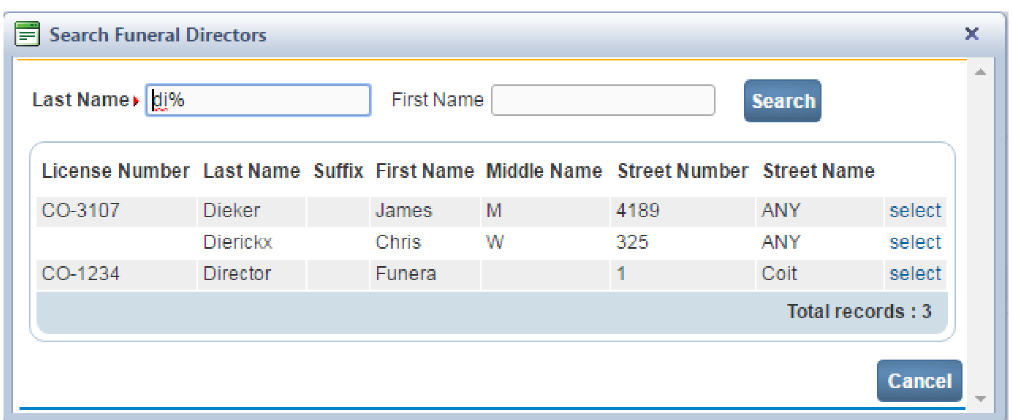
The system will then auto-populate the *Funeral Director* name and the associated *Funeral Home* information.



Steps for using the Standard LOV Lookup to complete

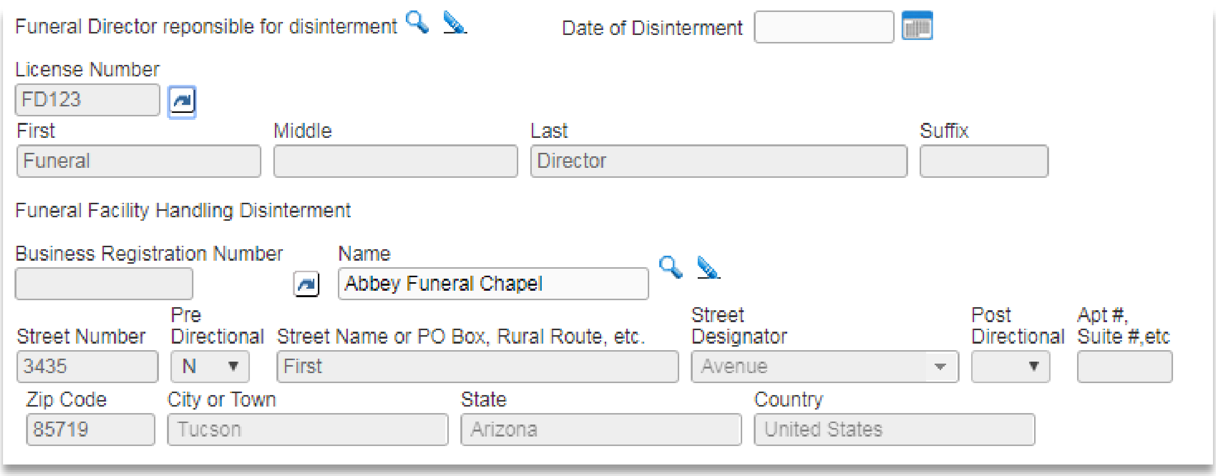
1. Select the *LOV* lookup tool to search for a funeral director.

2. Enter in the *Last* and *First Name* of the funeral director; if known. If not known a wildcard search can be performed by entering at least two characters in the *Last* name field followed by the percent sign (%).



3. From the Search Results List, select the *Select* link next to the correct Funeral Director.

The system will then auto-populate the *Funeral Director* name and the associated *Funeral Home* information.



- **Auto-population of the Funeral Home data** will occur only if the Funeral Director selected is associated with a single funeral home. If the Funeral Director is associated with multiple funeral homes, the correct funeral home data must be manually entered or searched for and selected.

- **To search for a funeral home**
  1. Select the Funeral Home *LOV* lookup tool
  2. In the Facility Name field enter the full name of the facility or use a wildcard search by entering the first two letters followed by a % and selecting search
  3. Select the correct funeral facility from the search results list and the system will auto-populate it on the page.

Date of Disinterment: Enter the *Date of Disinterment* manually or select the Calendar icon to launch the Interactive Calendar.

Name of Authorizing Agent or Court Name: Enter the name of the *Authorizing Agent* or the name of the *Court* which authorized the disinterment.

Relationship to Decedent or Court Order Number: Enter the *Relationship of the Authorizing Agent* or the *Court Order Number* provided by the authorizing court.

Date Approved by Authorizing Agent/File Date: Enter the *Date Approved by Authorizing Agent* or the *File Date* of the court authorization manually or select the Calendar icon to launch the Interactive Calendar.

Method of Disposition: Select the Method of Disposition for the reinternment from the list of values. If the Method is other than what is available in the list, select Other, Specify and then enter the Method on the Other Specify field.

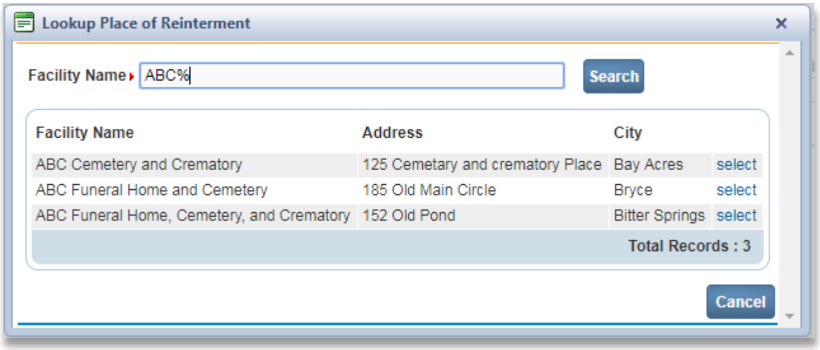
Location Reintered or Cremated:

If *Other (specify)* is selected from the *Method of Disposition* dropdown, the facility name. (if known or applicable), and address fields should be manually entered. The facility name field can be left blank.

For all other *Method of Disposition* dropdown selections,the *Location Reintered or Cremated* can be entered manually or the LOV Lookup icon can be used to launch the *Lookup Place of Reinternment* search tool.

Steps to Use the Location Reintered or Cremated Lookup

1. In the *Faclity Name* field, if known, enter the full name of the facility and choose *Search*.

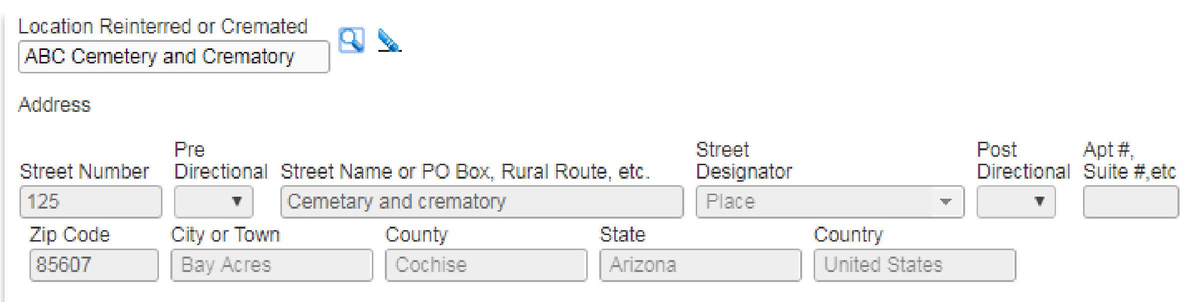


If the full name of the facility is not known, **enter at least two letters followed by the %**, then **select search** to perform a wildcard search.

2. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

Facilities not listed in the LOV lookup tool can be entered by typing the *Facility Name* and address information manually. All out-of-state records will contain non-listed facilities.

The selection system-fills all of the corresponding fields for Place of Death on the Place of Death page.



Cemetary or Crematory Manager's Name: Enter the name of the *Cemetart or Crematory Manager* where the remains will be reintered.

Once the *Disinter* page is complete, select a navigation button at the bottom of the page:

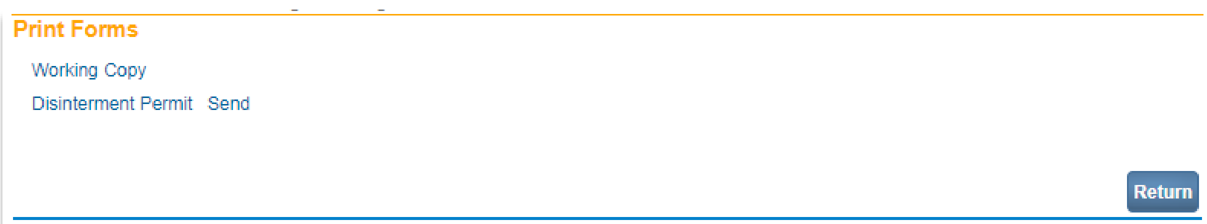
Selection of the *Validate Page* button to check the page for errors, the *Clear* button to clear all entries since the last save, the *Save* button to save changes without leaving the page, or the *Return* button to return to the last page in which action was taken.

8.8.2 Print Disinter-Reinter Permit

To access the *Disinterment Permit* select the *Print Forms* link from the *Other Links* within the *Death Registration* menu.

> If the information on the *Disinter/Reinter* page is not complete, the *Disinterment Permit* will not be available to print.

Once the *Disinter/Reinter* page is completed and the *Save* button has been selected, the *Disinterment Permit* will be enabled to print from the *Print* Forms page.



There are two options available:

1) Print the Disinterment Permit

Select the *Disinterment Permit* link and a PDF of the permit will be displayed to print.

2) Send the Disinterment Permit

Selecting the *Send* link next to the *Disinterment Permit* will send the permit to the Funeral Home listed on the *Disinter/Reinter* page. This allows a user at the select Funeral Home to directly print the *Disinterment Permit*.

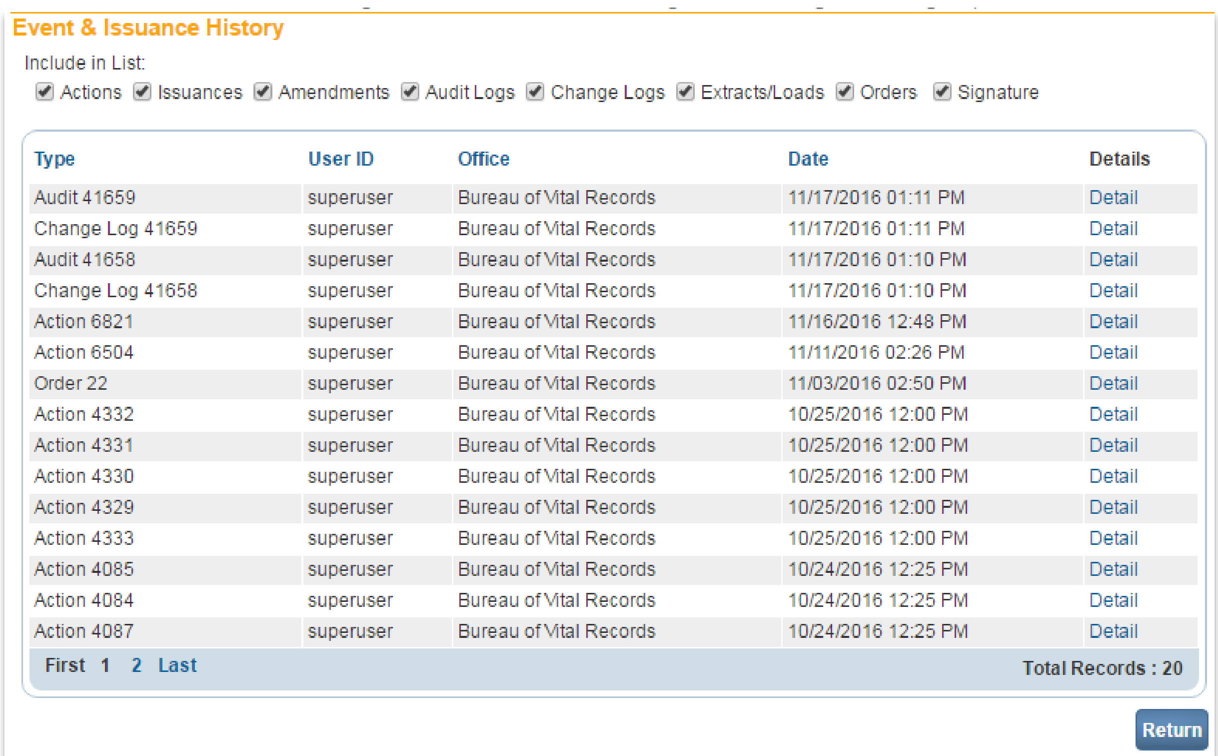
8.9 Event and Issuance History

DAVE™ performs extensive auditing and logging of all actions, changes, extracts, amendments, orders, and issuances that occur for all Death and Fetal Death registrations. The *Event and Issuance History* page allows the user to review these registrations audit logs.

Steps to View Event & Issuance History

From the Death or Fetal Death Registration Menu, select *Other Links > Event and Issuance History*.

The *Event & Issuance History* page displays a listing of activity associated with the selected death or fetal death record.


Event & Issuance History

Include in List:

Actions Issuances Amendments Audit Logs Change Logs Extracts/Loads Orders Signature

Type	User ID	Office	Date	Details
Audit 41659	superuser	Bureau of Vital Records	11/17/2016 01:11 PM	Detail
Change Log 41659	superuser	Bureau of Vital Records	11/17/2016 01:11 PM	Detail
Audit 41658	superuser	Bureau of Vital Records	11/17/2016 01:10 PM	Detail
Change Log 41658	superuser	Bureau of Vital Records	11/17/2016 01:10 PM	Detail
Action 6821	superuser	Bureau of Vital Records	11/16/2016 12:48 PM	Detail
Action 6504	superuser	Bureau of Vital Records	11/11/2016 02:26 PM	Detail
Order 22	superuser	Bureau of Vital Records	11/03/2016 02:50 PM	Detail
Action 4332	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4331	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4330	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4329	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4333	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4085	superuser	Bureau of Vital Records	10/24/2016 12:25 PM	Detail
Action 4084	superuser	Bureau of Vital Records	10/24/2016 12:25 PM	Detail
Action 4087	superuser	Bureau of Vital Records	10/24/2016 12:25 PM	Detail

First 1 2 Last Total Records : 20

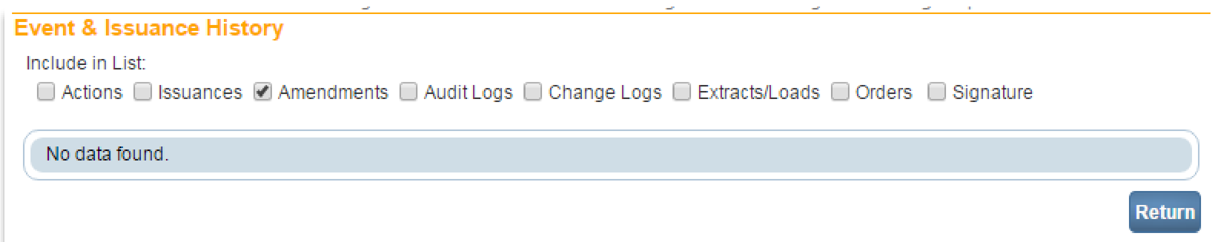
Return

Within the *Event and Issuance History* page, the activities auditied and logged are filtered into 7 categories: *Actions*, *Issuances*, *Amendments*, *Audit Logs*, *Change Logs*, *Extracts/Loads*, and *Orders*

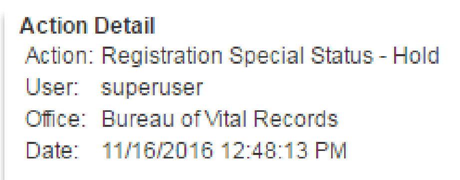
The default setting selects all *Include in List* checkboxes so that all logged activities are displayed. Results can then be filtered based on user preference by de-selecting checkboxes.

If a user does not have the security rights for a certain event or issuance history type, the associated checkbox is hidden and that type is filtered from the list.

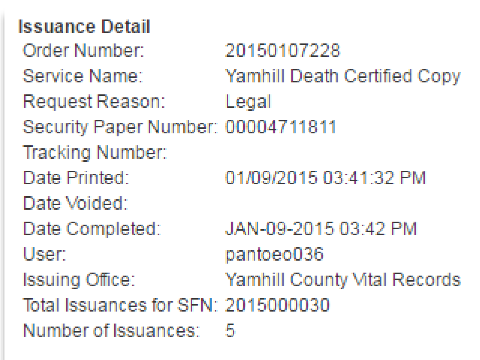
If the registration does not include any of the selected events or actions, the *Event & Issuance History* page will display "No data found." For example if no amendments have been made to the registration and only the *Amendments Include in List* item is selected the following will display:



Actions: The *Action Detail* displays action taken on the record, the user who performed the action, the office the user was logged into, and the date and time the action took place.



Issuances: *Issuance Detail* provides information related to the issuance of certified copies or other services. This information includes the order number, service, security paper number, user, issuing office, date and time printed, etc.



Amendments: *Amendments Detail* displays the information in regards to amendments made to the registration. Detail such as when the amendment was made, the status of the amendment, and the date it was completed or rejected.

Amendment Detail

Id	34
Type	Correction (State/County) - Death
Date Received	11/03/2016 01:01:05 PM
Date Completed/Rejected	11/03/2016 01:04:19 PM
Amendment Approval Status	
Order Number	

Status History

Start Date	End Date	Status	User	Comment
11/03/2016 01:04 PM		Amendment Approval Complete	superuser	
11/03/2016 01:04 PM		Complete	superuser	
11/03/2016 01:04 PM	11/03/2016 01:04 PM	Pending	superuser	
11/03/2016 01:01 PM	11/03/2016 01:04 PM	Keyed	superuser	
11/03/2016 01:01 PM	11/03/2016 01:04 PM	Amendment Approval Pending	superuser	

Audit Logs: *Audit Transaction Detail* displays information regarding the DAVE™ database table that was affected by actions taken on the registration. The *Old Value* and *New Value* are displayed in the data grid listing in regards to the Table and Column affected in the database.

Audit Transaction Detail
Log Id: 41659
User: superuser
Office: Bureau of Vital Records
Date: 11/17/2016 01:11:09 PM

Table	Column	Old Value	New Value
NAME	END_DATE		Nov 17 2016 1:11PM
RPTN Task	Decedent	3198	3198
REGISTRATION_PARTY_TASK_NAME	END_DATE		Nov 17 2016 1:11PM
NAME	START_DATE	Nov 17 2016 1:10PM	Nov 17 2016 1:11PM
NAME	END_DATE	Nov 17 2016 1:11PM	
NAME	LAST_NAME	Record	Deathrecord
RPTN Task	Decedent		3199
REGISTRATION_PARTY_TASK_NAME	NAME_ID		Anexample Deathrecord

Total Records : 8

Change Log: *Change Log Detail* displays changes made to field values within the registration. The user who made the change, date and time the change was made are displayed along with a grid showing the item changed, and old and new values.

Change Log Detail
User: superuser
Office: Bureau of Vital Records
Date: 12/05/2016 09:17:52 AM

Item Changed	Old Value	New Value
Disposition-Method of Disposition		Cremation
Disposition-Date of Disposition		NOV-05-2016
Death Registration - Death Disposition Type		C

Total Records : 3

Extracts/Loads:

Extracts/Loads displays any extracts and loads in which the registration was included.

Extract/Load Detail

Extract/Load:	Notification of Death Extract
User:	hb03512
Office:	Center for Health Statistics
Date:	03/01/2015 05:16 AM
Log Id:	181381

Orders: *Order Detail* displays the information on orders processed in regards to the record. The order number, current order status, the user that last updated the order, the issuing office of the order, the date and time that the order was requested along with the order status history are displayed.

Order Detail

Order Number:	20150613382
Order Status:	/Order Valid/Completed
User:	hb04476
Issuing Office:	Center for Health Statistics
Date Requested:	06/12/2015 02:20 PM

Status History

Start Date	End Date	Status	User	Comment
06/26/2015 02:25 PM		Completed	hb01593	All order subjects completed.
06/26/2015 02:24 PM		Order Valid	hb01593	
06/12/2015 06:25 PM	06/26/2015 02:24 PM	Invalid Relation - Tangible Interest	vcload	
06/12/2015 06:25 PM	06/26/2015 02:24 PM	Order Invalid	vcload	
06/12/2015 02:20 PM	06/12/2015 06:25 PM	Keyed	hb04476	
06/12/2015 02:20 PM	06/26/2015 02:25 PM	Incomplete	hb04476	

8.9.1 Archiving Event and Issuance History

The Event & Issuance History can be configured to archive at regular 30 day intervals. Once archiving has occurred, the user can review the *Event and Issuance History* without having to sort through older data. Archive data can be retrieved if needed.

To retrieve archived data, select the *Restore Archive* notification button located at the top of the *Event & Issuance History* page following the statement: “Some or all history for this record has been archived.”

Event & Issuance History

Include in List:

☑ Actions ☑ Issuances ☑ Amendments ☑ Audit Logs ☑ Change Logs ☑ Extracts/Loads ☑ Orders ☑ Signature

Some or all history for this record has been archived. **Restore Archive**

Type	User ID	Office	Date	Details
Audit 41659	superuser	Bureau of Vital Records	11/17/2016 01:11 PM	Detail
Change Log 41659	superuser	Bureau of Vital Records	11/17/2016 01:11 PM	Detail
Audit 41658	superuser	Bureau of Vital Records	11/17/2016 01:10 PM	Detail
Change Log 41658	superuser	Bureau of Vital Records	11/17/2016 01:10 PM	Detail
Action 6821	superuser	Bureau of Vital Records	11/16/2016 12:48 PM	Detail
Action 6504	superuser	Bureau of Vital Records	11/11/2016 02:26 PM	Detail
Order 22	superuser	Bureau of Vital Records	11/03/2016 02:50 PM	Detail
Action 4332	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4331	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4330	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4329	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4333	superuser	Bureau of Vital Records	10/25/2016 12:00 PM	Detail
Action 4085	superuser	Bureau of Vital Records	10/24/2016 12:25 PM	Detail
Action 4084	superuser	Bureau of Vital Records	10/24/2016 12:25 PM	Detail
Action 4087	superuser	Bureau of Vital Records	10/24/2016 12:25 PM	Detail

First 1 2 Last Total Records : 20

Return

Upon selection of the *Restore Archive* button, the button will be removed and the following message displayed:

Archival restore job in progress. Please exit the case; notification will be sent upon system-retrieval of all archived data.

Once the archived data is retrieved, an internal system message and external email will be sent to the user informing them that the data has been restored and is available for review.

Once the archived data is retrieved, the *Restore Archive* button is no longer displayed and the Total Records count, located at the bottom of the *Event & Issuance History* page, will have increased.

Before Archive Restore

First 1 2 Last Total Records : 20

After Archive Restore

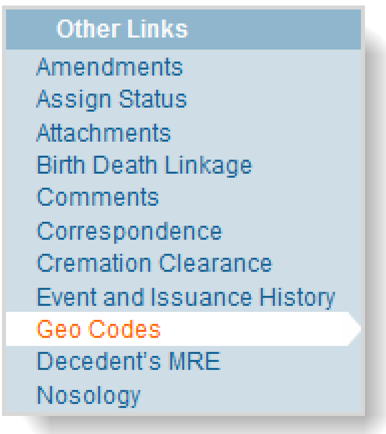
First 1 2 3 4 Last Total Records : 53

8.10 Geo Codes

Geocoding is the process of converting an address into geographic coordinates, referred to as GEO Codes. Geocodes facilitate population analysis to determine geographic health statistics, monitor the spread and outbreak of virulent disease, and perform mortality analyses for a given area or region. Geo Codes are also often used to ensure more efficient distribution of resources, assignment of personnel, and budgetary allocations. Some State registrars and other state agencies even use GIS technology to assign GEO codes to improve the determination of the geographic distribution of vital events.

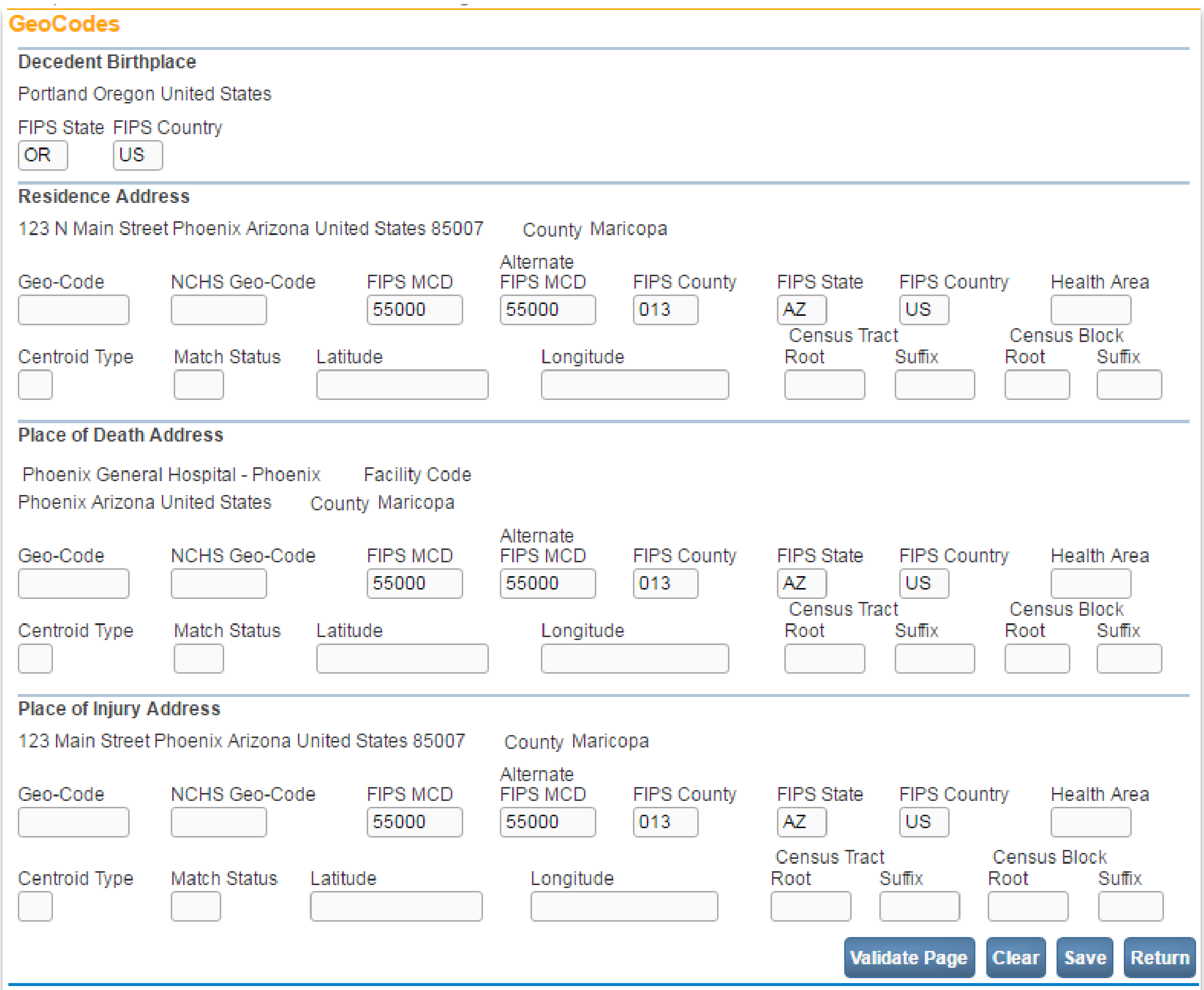
The ability to access the Geo Codes page is based on user security privileges.

From the *Other Links* sub-menu within a Death or Fetal Death registration select the *Geo-Codes* link.



Death Registration Geo Codes

There are four sections related to a death registrations GeoCodes page: *Decedent Birthplace*, *Residence Address*, *Place of Death Address*, and *Place of Injury Address*.



GeoCodes

Decedent Birthplace

Portland Oregon United States

FIPS State: OR
FIPS Country: US

Residence Address

123 N Main Street Phoenix Arizona United States 85007
County: Maricopa

Geo-Code | NCHS Geo-Code | FIPS MCD: 55000 | Alternate FIPS MCD: 55000 | FIPS County: 013 | FIPS State: AZ | FIPS Country: US | Health Area

Centroid Type | Match Status | Latitude | Longitude | Census Tract Root | Census Tract Suffix | Census Block Root | Census Block Suffix

Place of Death Address

Phoenix General Hospital - Phoenix
Facility Code
Phoenix Arizona United States
County: Maricopa

Geo-Code | NCHS Geo-Code | FIPS MCD: 55000 | Alternate FIPS MCD: 55000 | FIPS County: 013 | FIPS State: AZ | FIPS Country: US | Health Area

Centroid Type | Match Status | Latitude | Longitude | Census Tract Root | Census Tract Suffix | Census Block Root | Census Block Suffix

Place of Injury Address

123 Main Street Phoenix Arizona United States 85007
County: Maricopa

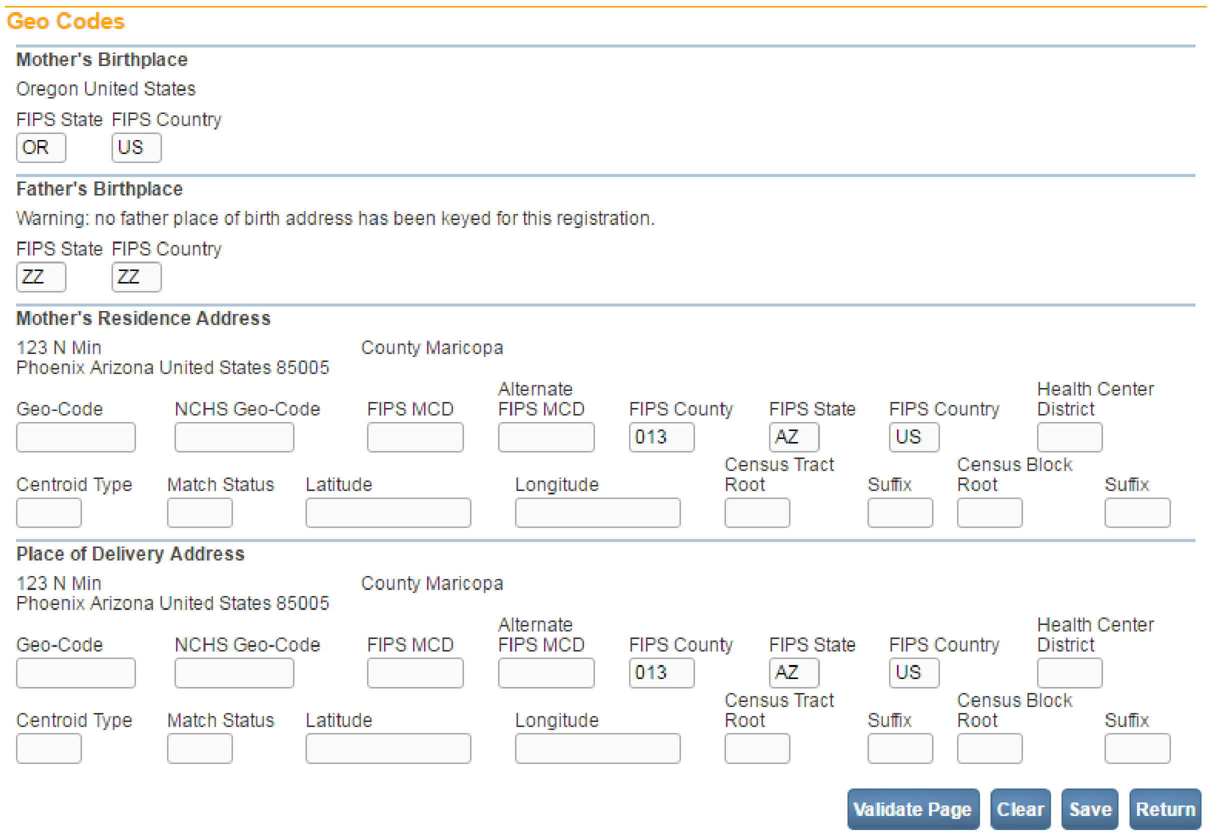
Geo-Code | NCHS Geo-Code | FIPS MCD: 55000 | Alternate FIPS MCD: 55000 | FIPS County: 013 | FIPS State: AZ | FIPS Country: US | Health Area

Centroid Type | Match Status | Latitude | Longitude | Census Tract Root | Census Tract Suffix | Census Block Root | Census Block Suffix

Validate Page | Clear | Save | Return

Fetal Death Registration Geocodes

There are four sections related to fetal death registrations GeoCodes page: Mother's Birthplace, Father's Birthplace, Mother's Residence Address, and Place of Delivery Address.



The DAVE™ application auto-populates most of the controls on the Geo Codes page. This information is auto-populated based on the location information that is completed within the registration pages which contain these fields. If no information is entered on these pages the fields on the Geo Codes page will not be auto-populated.

If a value entered for a location control is not in the place LOV (such as rural areas where the place name is a village or is unincorporated), there would be no code assigned by the system. In cases like this, the user should manually enter the valid code in the necessary fields.

It is important to review all system filled entries and enter any missing codes. Incomplete addresses will trigger error messages and prevent Geo-Coding.

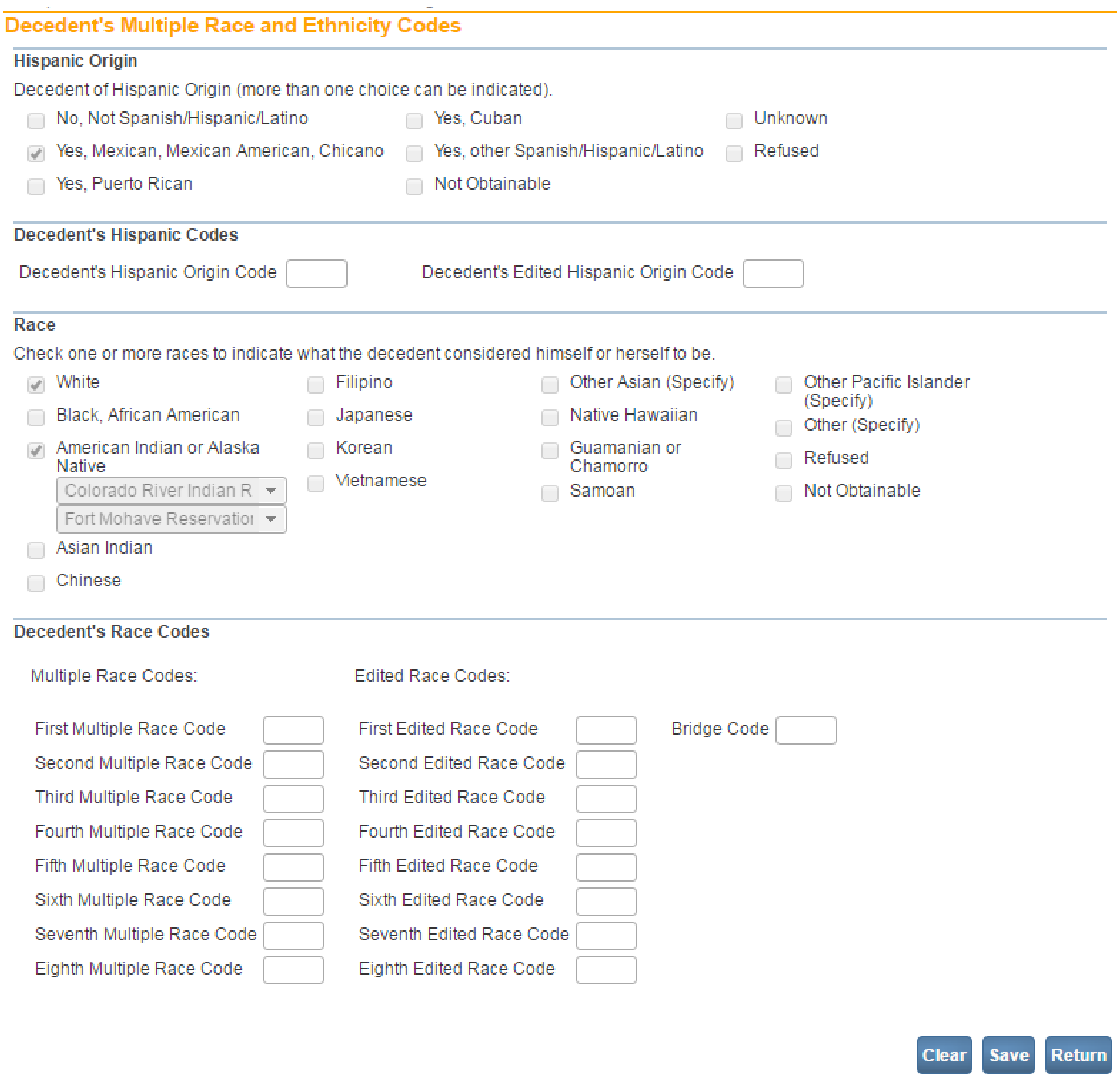
Once codes have been verified and/or entered, select the *Save* button to save all GIS information for the death registration case.

8.11 Multiple Race and Ethnicity (MRE)

DAVE™ contains MRE (Multiple Race and Ethnicity Codes) pages within the death and fetal death registrations. The MRE page serves as a checklist of statistical data and is used to collect and display data on race and hispanic origin . The MRE codes are provided by NCHS and the State.

Death Registration - Decedent's MRE

From the Death Registration Menu choose *Other Links* > *Decedent's MRE*.



Decedent's Multiple Race and Ethnicity Codes

Hispanic Origin

Decedent of Hispanic Origin (more than one choice can be indicated).

- [ ] No, Not Spanish/Hispanic/Latino
- [x] Yes, Mexican, Mexican American, Chicano
- [ ] Yes, Puerto Rican
- [ ] Yes, Cuban
- [ ] Yes, other Spanish/Hispanic/Latino
- [ ] Not Obtainable
- [ ] Unknown
- [ ] Refused

Decedent's Hispanic Codes

Decedent's Hispanic Origin Code

Decedent's Edited Hispanic Origin Code

Race

Check one or more races to indicate what the decedent considered himself or herself to be.

- [x] White
- [ ] Black, African American
- [x] American Indian or Alaska Native
  - Colorado River Indian R
  - Fort Mohave Reservatioi
- [ ] Asian Indian
- [ ] Chinese
- [ ] Filipino
- [ ] Japanese
- [ ] Korean
- [ ] Vietnamese
- [ ] Other Asian (Specify)
- [ ] Native Hawaiian
- [ ] Guamanian or Chamorro
- [ ] Samoan
- [ ] Other Pacific Islander (Specify)
- [ ] Other (Specify)
- [ ] Refused
- [ ] Not Obtainable

Decedent's Race Codes

Multiple Race Codes:	Edited Race Codes:	
First Multiple Race Code	First Edited Race Code	Bridge Code
Second Multiple Race Code	Second Edited Race Code	
Third Multiple Race Code	Third Edited Race Code	
Fourth Multiple Race Code	Fourth Edited Race Code	
Fifth Multiple Race Code	Fifth Edited Race Code	
Sixth Multiple Race Code	Sixth Edited Race Code	
Seventh Multiple Race Code	Seventh Edited Race Code	
Eighth Multiple Race Code	Eighth Edited Race Code	

Clear Save Return

The selections in the Ancestry and Decedent's Race sections are system-filled based on entries made on the Decedent Attributes page and are unavailable to edit.

When the MRE load file is received from NCHS the MRE page will be updated with the corresponding Hispanic and Race codes.

Users with the appropriate security permissions are able to view and edit the Multiple Race and Ethnicity (MRE) load data including the Decedent's selected race(s), and the corresponding race code(s).

Fetal Death Registration – Mother and Father's MRE

From the Death Registration Menu choose *Other Links* > *Mother's MRE* or *Father's MRE.*

Mother's Multiple Race and Ethnicity Codes

Hispanic Origin (Check all that apply)

- No, not Spanish/Hispanic/Latina
- Yes, Mexican, Mexican American, Chicana
- Yes, Puerto Rican
- Yes, Cuban
- Yes, Other Spanish/Hispanic/Latina (e.g. Spainard, Salvadoran, Columbian)
- Unknown if Spanish/Hispanic/Latina

Mother's Hispanic Codes

Mother Hispanic Origin Code

Mother's Edited Hispanic Origin Code

Which one or more of the following is your race? (Check all that apply)

- White
- Black or African American
- American Indian or Alaska Native (name of enrolled/principal tribe)
- Cocopah Indian Reserva
- Asian Indian
- Chinese
- Filipino
- Japanese
- Korean
- Vietnamese
- Other Asian (specify)
- Native Hawaiian
- Guamanian or Chamorro
- Samoan
- Other Pacific Islander (specify)
- Other (Specify)
- Unknown

Mother's Race Codes

Multiple Race Codes:

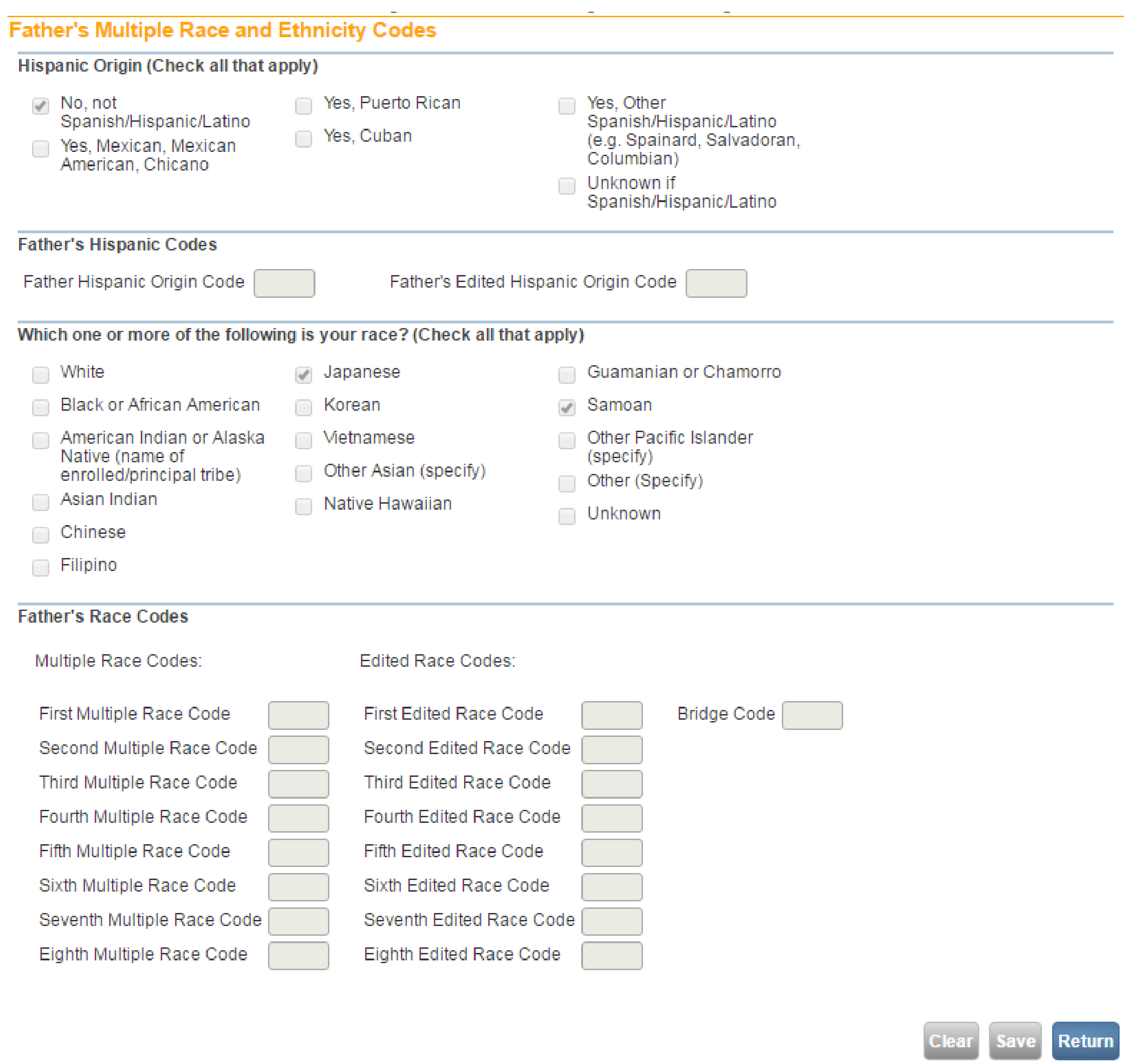
First Multiple Race Code
Second Multiple Race Code
Third Multiple Race Code
Fourth Multiple Race Code
Fifth Multiple Race Code
Sixth Multiple Race Code
Seventh Multiple Race Code
Eighth Multiple Race Code

Edited Race Codes:

First Edited Race Code
Second Edited Race Code
Third Edited Race Code
Fourth Edited Race Code
Fifth Edited Race Code
Sixth Edited Race Code
Seventh Edited Race Code
Eighth Edited Race Code

Bridge Code

Clear Save Return



Father's Multiple Race and Ethnicity Codes

Hispanic Origin (Check all that apply)

- [x] No, not Spanish/Hispanic/Latino
- [ ] Yes, Mexican, Mexican American, Chicano
- [ ] Yes, Puerto Rican
- [ ] Yes, Cuban
- [ ] Yes, Other Spanish/Hispanic/Latino (e.g. Spainard, Salvadoran, Columbian)
- [ ] Unknown if Spanish/Hispanic/Latino

Father's Hispanic Codes

Father Hispanic Origin Code

Father's Edited Hispanic Origin Code

Which one or more of the following is your race? (Check all that apply)

- [ ] White
- [ ] Black or African American
- [ ] American Indian or Alaska Native (name of enrolled/principal tribe)
- [ ] Asian Indian
- [ ] Chinese
- [ ] Filipino
- [x] Japanese
- [ ] Korean
- [ ] Vietnamese
- [ ] Other Asian (specify)
- [ ] Native Hawaiian
- [ ] Guamanian or Chamorro
- [x] Samoan
- [ ] Other Pacific Islander (specify)
- [ ] Other (Specify)
- [ ] Unknown

Father's Race Codes

Multiple Race Codes:

Edited Race Codes:

First Multiple Race Code | First Edited Race Code | Bridge Code

Second Multiple Race Code | Second Edited Race Code

Third Multiple Race Code | Third Edited Race Code

Fourth Multiple Race Code | Fourth Edited Race Code

Fifth Multiple Race Code | Fifth Edited Race Code

Sixth Multiple Race Code | Sixth Edited Race Code

Seventh Multiple Race Code | Seventh Edited Race Code

Eighth Multiple Race Code | Eighth Edited Race Code

Clear Save Return

The selections in the Ancestry and Decedent's Race sections are system-filled based on entries made on the Mother and Father Attributes pages and are unavailable to edit.

When the MRE load file is received from NCHS the MRE page will be updated with the corresponding Hispanic and Race codes.

Users with the appropriate security permissions are able to view and edit the Multiple Race and Ethnicity (MRE) load data including the Decedent's selected race(s), and the corresponding race code(s).

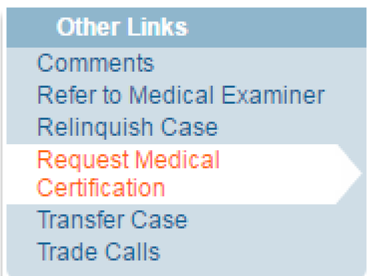
8.12 Request Medical Certification

Request Medical Certification assigns the ownership of the *Medical Information* to the selected medical facility.

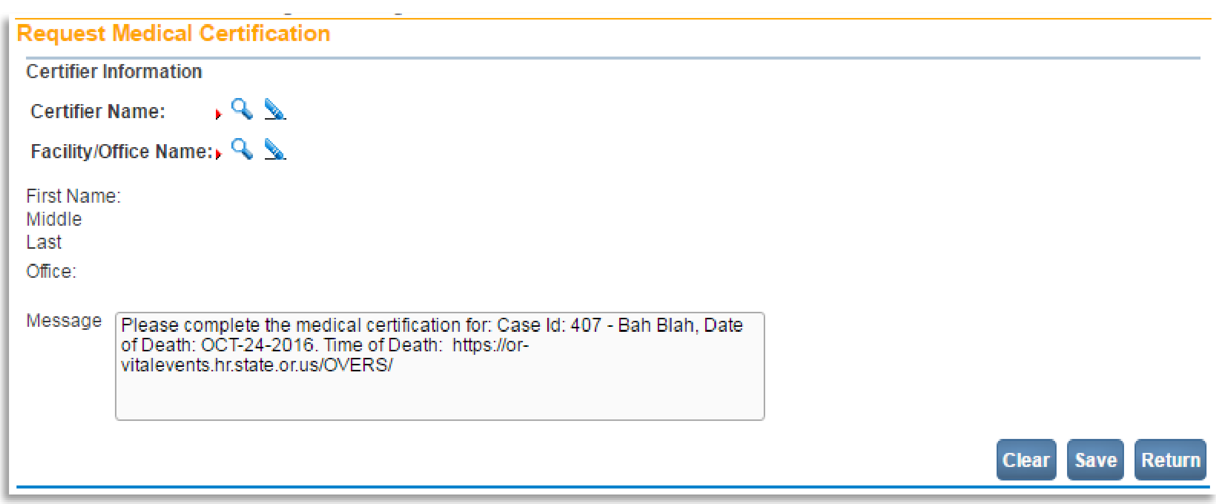
The Request Medical Certification link is available based on user security privileges and is suppressed if the case already has a medical owner.

Steps to Request Medical Certification

1. From the Death Registration Menu select *Other Links* > *Request Medical Certification*

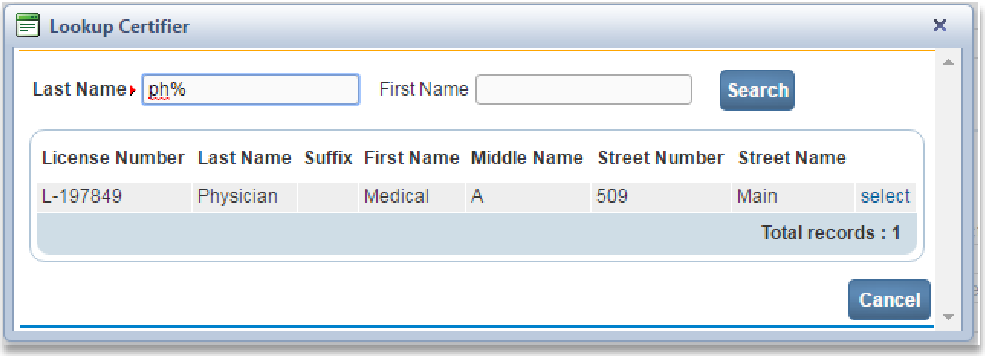


The Request Medical Certification page will display



2. Select the Lookup icon next to *Certifier Name* to access the *Lookup Certifier* page.

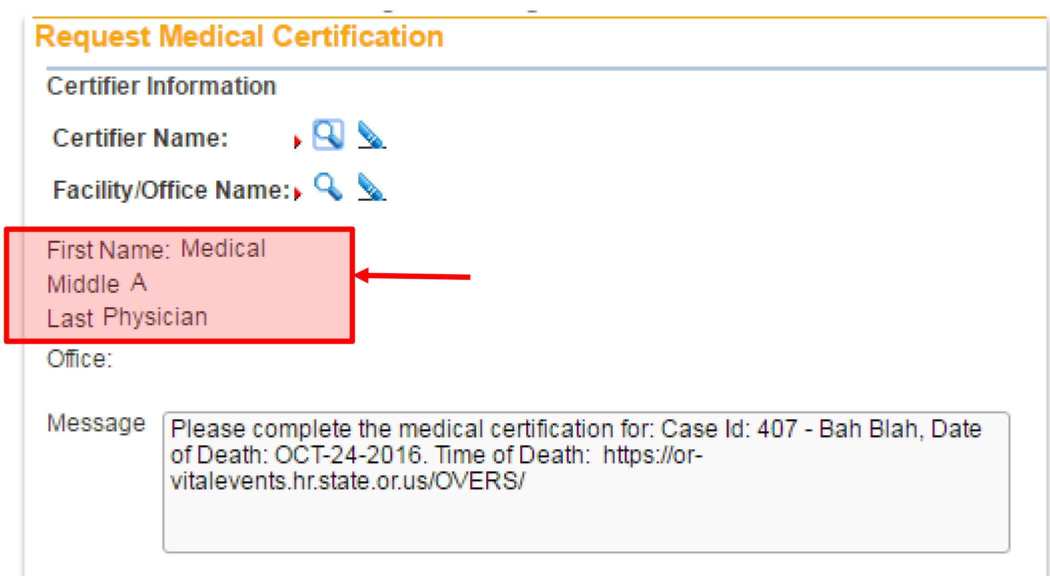
3. Enter in the *Last* and *First Name* of the certifier; if known. If not known a wildcard search can be performed by entering at least two characters in the *Last* name field followed by the percent sign (%).



4. From the *Search Results List* Select the link next to the correct Certifier.

The list of certifiers available from the Certifier Lookup dialog box will be filtered to include only those data providers that have been configured to sign death certificates and are valid (i.e., current) users of the DAVE™ application.

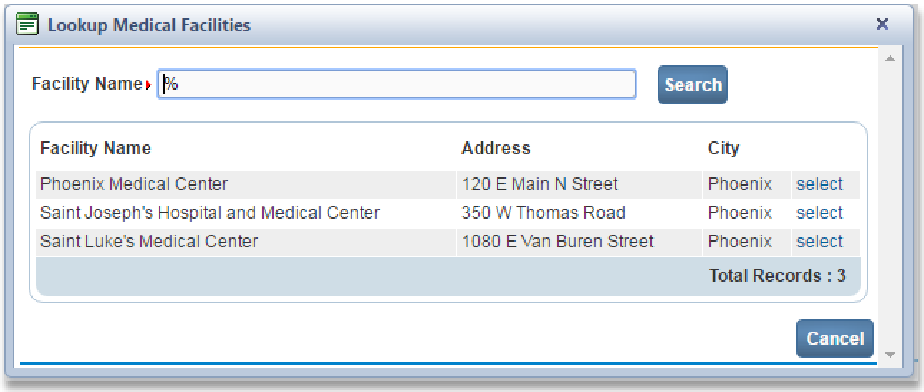
Selection of a certifier will close the LOV search page and populate the certifier's name fields on the Request Medical Certification page.



5. Select the Lookup icon next to *Faciity/Office Name* to access the *Lookup Medical Facilities* page.

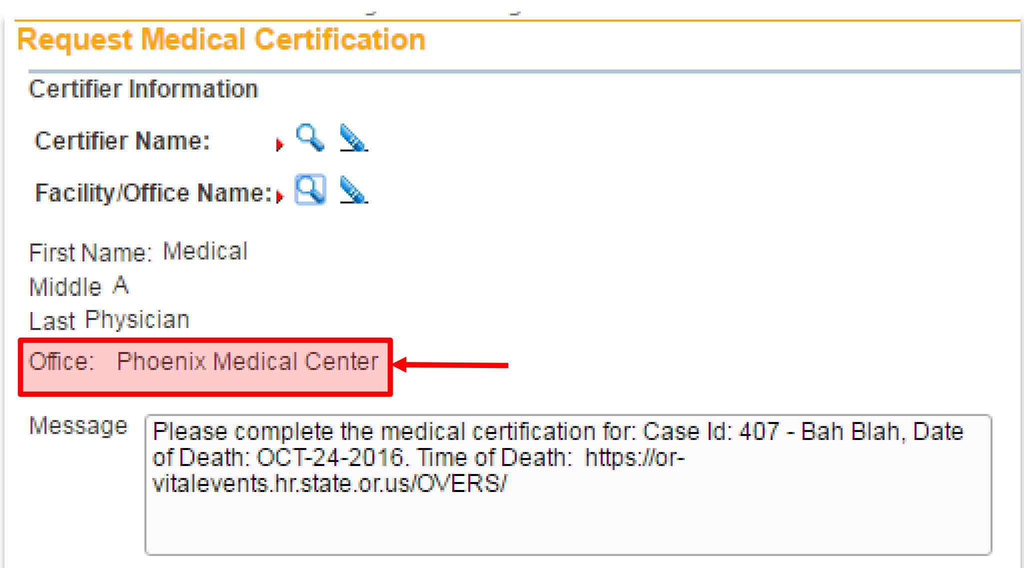
6. In the *Faclity Name* field, if known, enter the full name of the facility and choose *Search*.

If the full name of the facility is not known, **enter %**, then **select search** to perform a wildcard search.



7. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

Selecting a facility will close the LOV search page and populate the *Office* name in the *Certifier Information* section of the Request Medical Certification page.



8. The *Message* text entry box is system-filled with information related to the case and the request for medical certification. Additional information may be added if needed.

9. Once all items are completed select the *Save* button to save changes and forward the request the selected certifier.

When *Save* is selected:

- The Request Medical Certification page refreshes with all fields disabled except the *Return* button. This allows the user to review the message sent while simultaneously preventing the user from inadvertently saving and sending a new message.

- An internal message and external email requesting medical certification are sent to the physician and facility to which the request is being made.

- The ownership of the Medical Information is assigned the medical facility to which the request was selected to be sent.
- A status of “Medical Certification Requested” is assigned to the record.

Selecting **Clear** will clear all information that has been entered on the page.
Selecting **Return** will return the user to the last page they took action on.

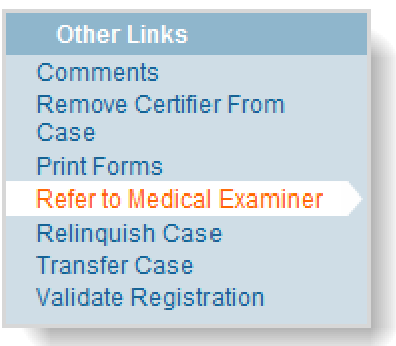
8.13 Refer to Medical Examiner

In most jurisdictions, any death that is thought to be the result of an accident, suicide, homicide or any death that occurred in a suspicious or unusual manner, must be referred to a medical examiner (ME) . The *Refer to Medical Examiner* feature is used by funeral directors, medical data providers, and vital record offices to refer such deaths to a medical examiner.

Additionally, DAVE™ edit rules check the cause of death entries for “referral” terms that may require review by an ME. Referral terms are terms such as accident, trauma, fall, poisoning, etc. When an edit rule fails due to the use of a referral term, an error message will be displayed advising that the case should be referred to a medical examiner.

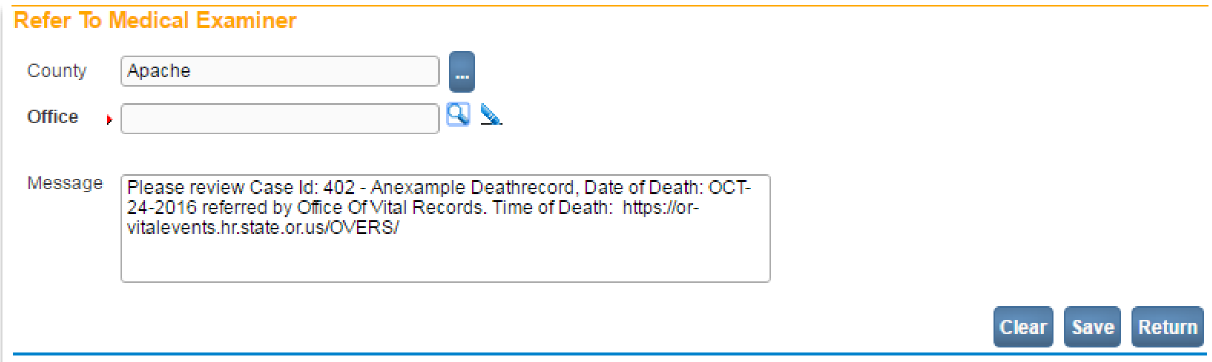
Access to the Refer to Medical Examiner page is dependent upon user security privileges.

From the Death Registration Menu, select *Other Links > Refer to Medical Examiner*.



The *Refer to Medical Examiner* link will be hidden from funeral home users and medical data providers if the case has a status of Registered or Dropped to Paper.

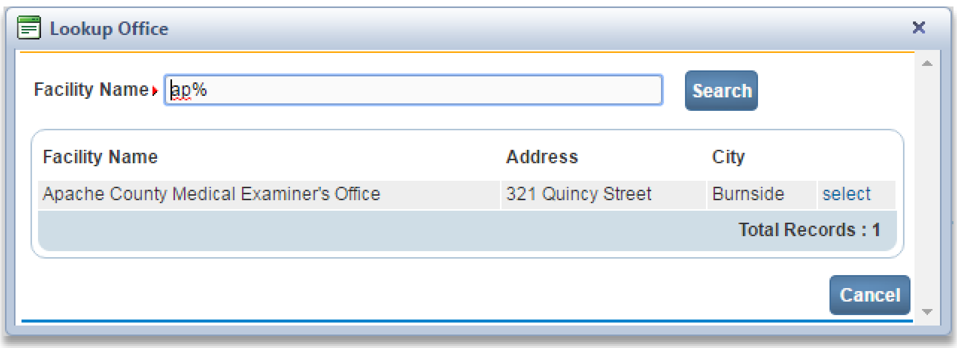
The *Refer to Medical Examiner* page will display and the *County* field will be pre-filled according to the county listed on the *Place of Death* page.



Select the LOV lookup tool to search for the medical examiner office.

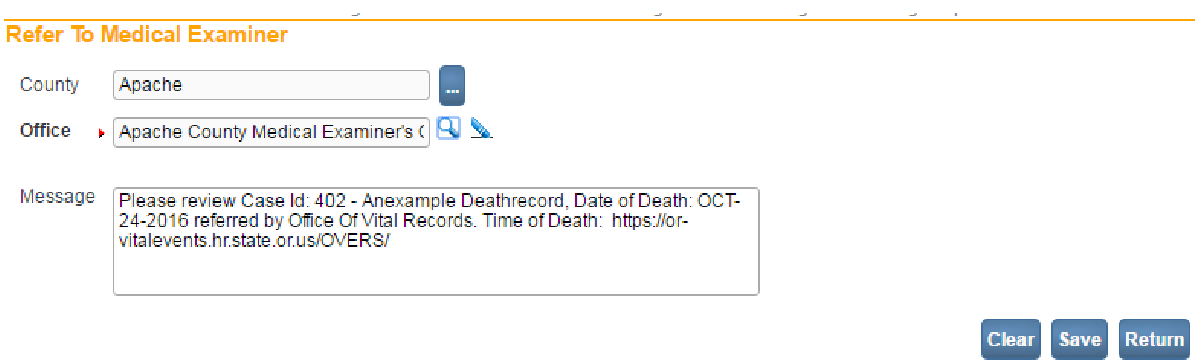
1. In the *Faclity Name* field, enter the full name of the facility, if known, and select the *Search* button.

If the full name of the facility is not known, **enter at least two letters followed by the %**, then **select search** to perform a wildcard search.



2. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

The selection system-fills the office selected on the Refer to Medical Examiner page.



The message displayed is system filled and contains information related to the case being referred. The user making the referral may add additinonal information if needed.

Once all items are completed, selecting Save will:

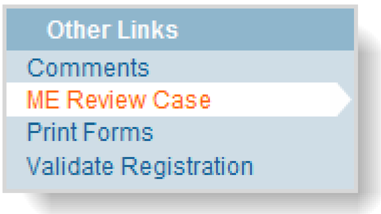
- Assign a *Referred to ME* and *ME Review Required* status to the case.
- Send an internal message and external email to the selected Medical Examiner office.

- Disable all fields on the *Refer to Medical Examiner* page to prevent a duplicate message from being sent.

Selecting **Clear** will clear all information that has been entered on the page.
Selecting **Return** will return the user to the last page they took action on.

8.14 ME Review Case

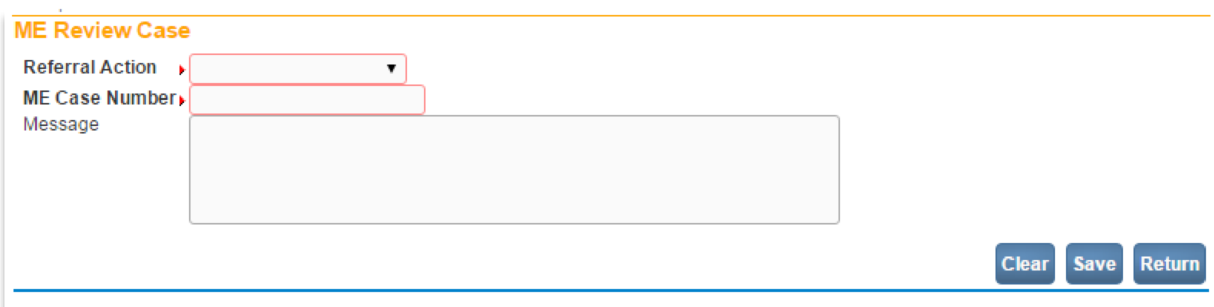
The ME Review Case page is used by the Medical Examiner to Accept or Decline ownership of the referred death record.



1. From the Death Registration Menu select *Other Links* > *ME Review Case*.

On the *ME Review Case Page*, the *Referral Action* and *ME Case Number* are marked with red arrows indicating required fields.

2. Make a selection from the *Referral Action* dropdown and enter an *ME Case Number*.



Referral Actions

Accept Referral is used when the ME decides to take ownership of the medical information. If *Accept Referral* is selected from the *Referral Action* dropdown, selecting the *Save* button results in the following:

- An *Under ME Review* status is assigned to the case.
- DAVE™ prevents updates to the medical information by the original medical owner by assigning medical ownership to the ME user.
- If the case has a *Certified* status, the status will be changed to *Uncertified*.

- If the current user is a medical examiner, the certifier and pronouncer information (name, license number address, etc.) will be replaced with the corresponding values for the current ME user.

- If the current user is a medical examiner office user but not a medical examiner, the certifier and pronouncer information (name, license number address, etc) will be set to null or blank.

- Upon successful certification, DAVE™ will remove the *Under ME Review* and the *ME Review Required* Work Queue statuses.

- The Medical Examiner facility now owns the Medical Information of the death record and can edit the medical pages and certify the cause and manner of death. *See section 4.6 – Death medical Information Pages* for more nformation.

Decline Referral is used to refuse ownership or control of a record. If *Decline Referral* is selected from the *Referral Action* dropdown, selecting the *Save* button will result in the following:

- The case will be assigned a *Referral Declined* status.

- The *ME Review Required* Work Queue status will be removed.

- If the registration has a *Hold* special status, the work queue status *ME Review Complete* will be added.

Pending is used when the ME determines that additional discussion is needed with the referring party before making a determination on the case or when the cause of death is incomplete. If *Pending* is selected from the *Referral Action* dropdown list, selecting the Save button will result in the following:

- The case will be assigned an *Under ME Review* status.

- The ME/Coroner will indicate in the comment the reason the case has been assigned a pending status. Once the ME/Coroner has consulted with the certifier, the ME will update the *Pending* status.

- Medical ownership of the case will not change

- The medical information is not locked, however the case cannot be certified until the Pending status is changed to *Accept Referral* or *Decline Referral* which removes the *Under ME Review Status*.

Take Control of Case is used when the ME is not the medical owner of the case, but determines that the case falls under ME jurisdiction. Once the ME user accepts or "takes control of a case," then he/she is responsible for completing and certifying the medical information. If *Take Control of Case* is selected from the *Referral Action* dropdown, selecting the *Save* button will result in the following:

- The *Under ME Review* status will be assigned to the case.

- The DAVE™ application will prevent updates to the medical information section by changing the ownership of the case to the ME user.

- The certifier information (name, license number address, etc.) will be replaced with the corresponding values for the current ME user.

- A status of *Uncertified* will be assigned to the case if the registration was previously certified.

- When the ME certifies the record, the following ME Referral statuses will be removed: *Under ME Review* and the *ME Review Required* Work Queue.

- The medical information section will be set to null and the original medical information will be stored in event history.

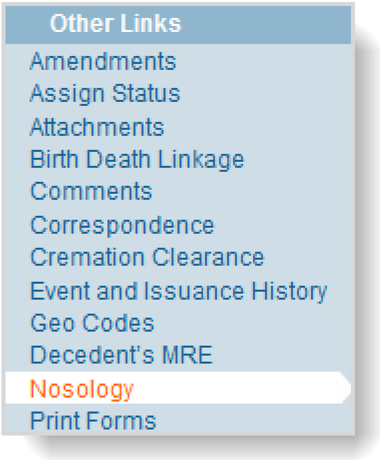
Overall, when the *Save* button is selected, DAVE™ sends messages to update the referring party, medical owner, and personal owner of the record as to the *Referral Action* taken on the record:

- An internal message is sent to the medical owner of the case (all users of the office associated to the medical owner office will be able to see the message).
- An internal message is sent to the personal owner of the case (all users of the office associated to the personal owner office will be able to see the message).
- An internal message is sent to the user who referred the case if the user is not associated with personal owner office or medical owner office.
- An external message is sent to the user that referred the case.

8.15 Nosology

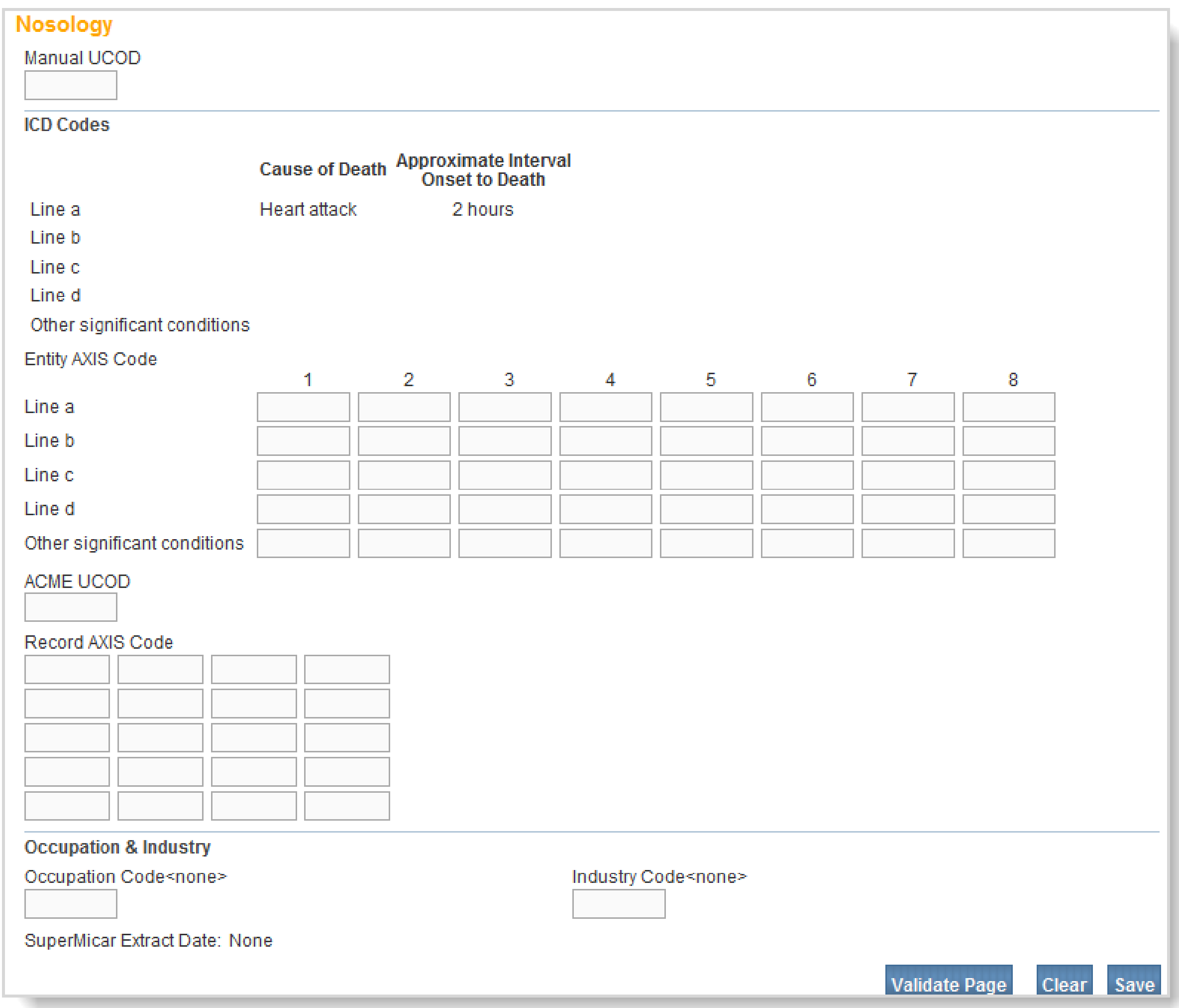
Nosology is the science of classifying diseases. It is used extensively in public health to allow epidemiological studies of public health issues. Analysis of death certificates requires the coding of causes of death. Each cause or condition listed in the cause of death section of the death certificate is assigned an International Classification of Diseases (ICD) code.

In the DAVE™ application, these codes are displayed on the Nosology page.



From the Death Registration Menu, select *Other Links > Nosology*.

The Nosology page displays. If no data is present, the fields may be completed manually.



The Nosology page will typically be system-filled by the NCHS Transax load. However, all fields can be manually edited if needed.

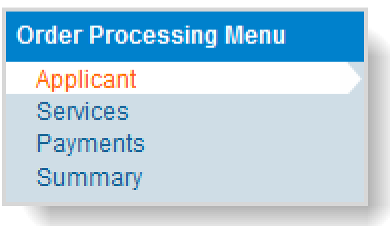
To complete the Nosology page, enter valid ICD codes in the ICD Codes tab. When all changes and/or entries are complete, select the *Save* button to record the values entered.

8.16 Order Certified Copies

Part of the service a funeral home provides is obtaining certified copies of death and fetal death certificates for the decedent's family. Funeral home users can use the DAVE™ order processing module to electronically submit a request for certified copies for cases for which they are responsible.

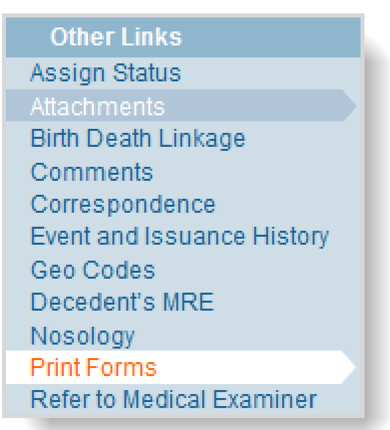
> Access to the Order Certified Copies page is restricted based on user security privileges and is only available to Funeral Home users.

There are four Order Processing pages that must be completed for a funeral home to submit an order: *Applicant*, *Services*, *Payments*, *Summary*.



Refer to Order Processing section 10 for detailed instructions on completing these pages.

8.17 Print Forms

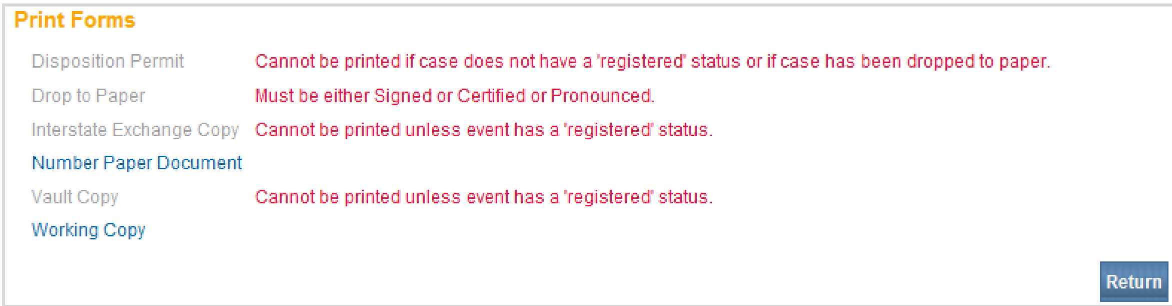


The *Print Forms* page within DAVE™ allows users to print registration-related documents such as working copies, vault copies, etc.

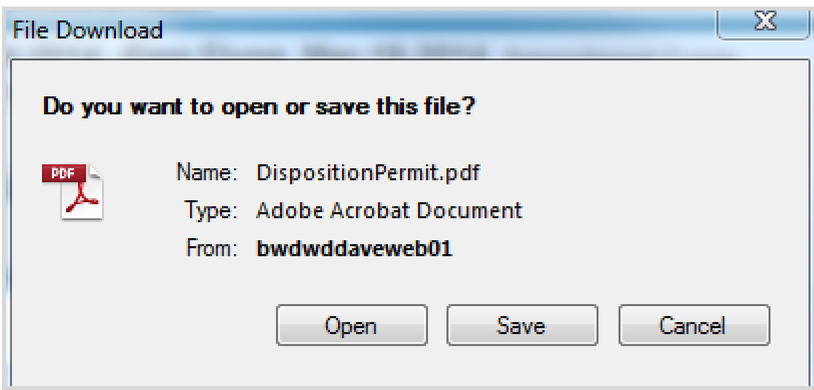
From within the Death or Fetal Death record select *Other Links* > *Print Forms* to access the *Print Forms* page.

> Access to the various print forms is determined by both user security setup and the statuses assigned to the registration.

Below are examples of some of the types of print forms that may be available. Disabled links are accompanied by a message explaining why the corresponding form is not available for printing.



Selecting an available print form, such as the Working Copy displayed in this example, will launch the *File Download* window. Select *Open* to launch the pdf.

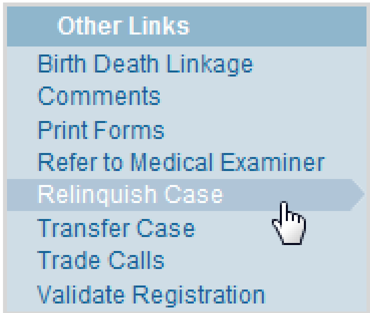


8.18 Relinquish Case

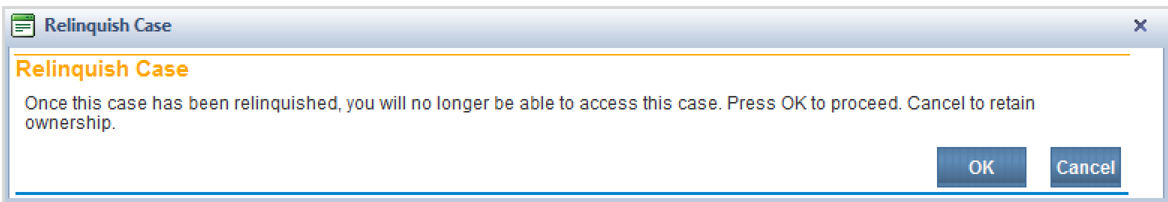
Relinquish Case is used to surrender control of a case so that another facility may assume ownership. For example, if two family members start services for the same decedent at different funeral homes, the funeral home that owns the record would need to relinquish ownership of the *Personal Information* to allow the correct funeral home to access to the record. (Transfer Case may also be used to accomplish this same task. See *Section 8.18– Transfer Case* for more information.)

Steps to Relinquish Case

1. From the Registration Menu select *Other Links > Relinquish Case*.



2. On the Relinquish Case page, select *OK* to surrender ownership, or *Cancel* to retain ownership of the record.



Once Ownership is relinquished the user will be returned to the DAVE™ homepage and will no longer have access to that particular registration.

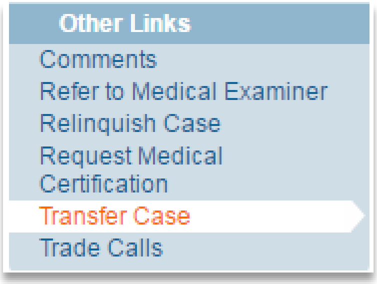
8.19 Transfer Case

From time to time, it may be necessary for a facility such as a Funeral Home or Hospital to transfer their ownership of a case to another similar facility. For example, if the decedent had multiple survivors, and burial arrangements were inadvertently made at multiple sites, one of those sites might need to transfer ownership of the case. Once the case is transferred, ownership is changed and any actions the previous owner took within the record is retained in Event and Issuance History.

The Transfer Case link is disabled on records with a status of Registered.

Steps to Transfer Case

1. Select *Other Links > Transfer Case*.

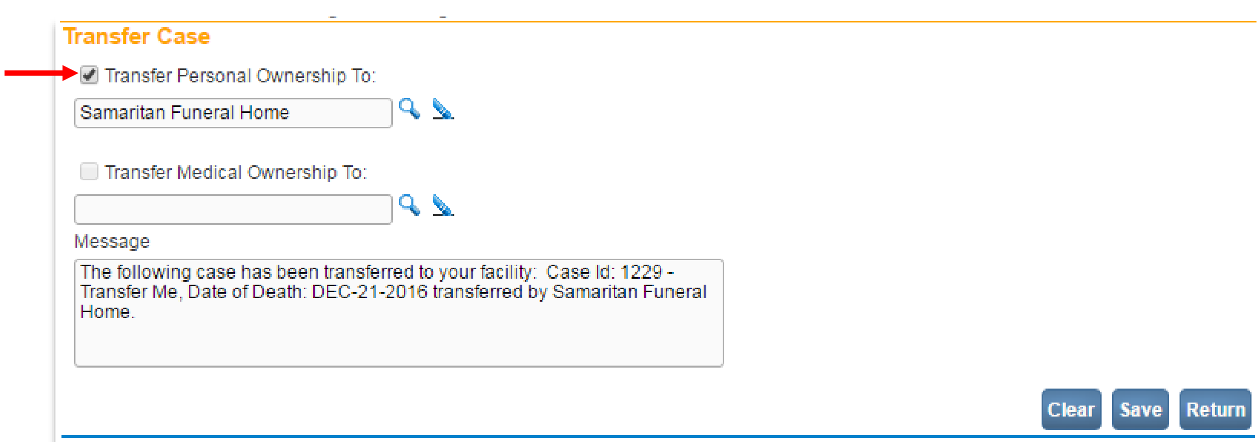


2. The Transfer Case presents two options: *Transfer Personal Ownership To* and *Transfer Medical Ownership To*. The user type determines which transfer checkbox is enabled. For example, a funeral director may only transfer personal ownership while a medical certifier may only transfer medical ownership.

If the owner is the personal owner only	The Transfer Medical Ownership field will be disabled.
If the owner is the medical owner only	The Transfer Personal Ownership field will be disabled.
If the owner is both the personal and medical owner	Both Transfer fields will be enabled.
If the user is a state office user	The Transfer Personal Ownership and Transfer Medical Ownership links will be enabled based on whether the case has an existing Personal or Medical Owner.

Regardless of the type of ownership being transferred the steps are the same. In the example steps below we will transfer personal ownership.

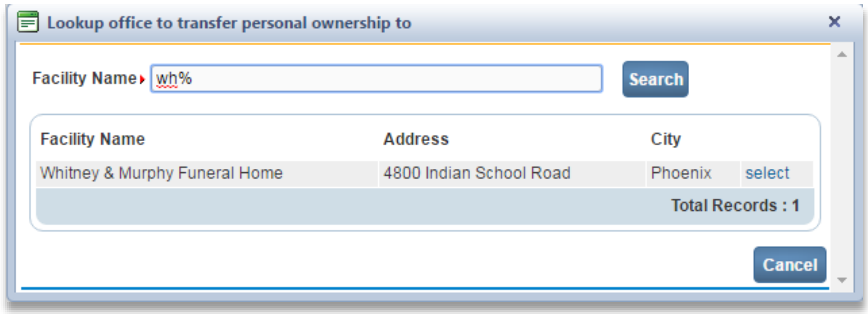
3. To transfer ownership, place a checkmark in the box next to the ownership type to be transferred.



4. Select the LOV lookup tool associated with the type of ownership to be transferred. The *Lookup office to transfer* window is displayed.

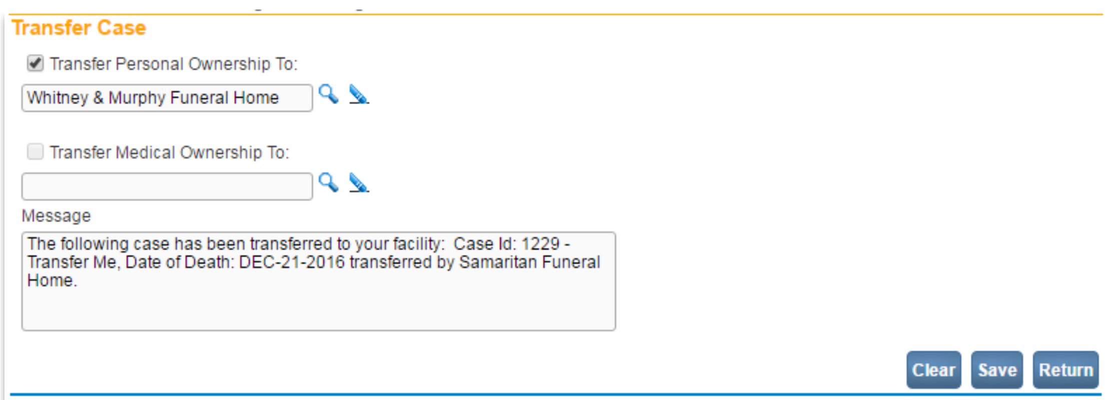
5. In the *Faclity Name* field, enter the full name of the facility, if known, and select the *Search* button.

If the full name of the facility is not known, **enter at least the first two letters followed by the %**, then **select search** to perform a wildcard search



6. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

7. The selection system-fills the funeral home name on the Transfer Case page.



8. The Message text entry box is pre-filled with information relevant to the case being transferred. Additional information may be added if needed.

9. Once all items are completed select the *Save* to transfer the case. Once transferred the user will be returned to the home page and will no longer have access to the record.

When *Save* is selected:

- Ownership of the Personal or Medical Information is transferred from the facility that performed the transfer to the facility selected.

- An internal message will be sent to the facility to which the record has been transferred to.

- If the office is receiving ownership of the personal information:

On the *Disposition* page, the funeral home office and address will be system-filled with the office name and address of the office selected.

On the *Disposition* page the funeral director information will be cleared.

If the record was signed, the signed status will be removed and the date signed will be cleared.

- If the office is receiving ownership of the medical information:

On the *Certifier* page the certifier name will be cleared.

On the *Certifer* page the certifier address will be system-filled with the address of the office selected to receive the transfer.

If the record was certified, the certified status will be removed and the date certified will be cleared.

> Selecting **Clear** will clear all information that has been entered on the page.
> Selecting **Return** will return the user to the last page they took action on.

8.20 Trade Calls

A trade call occurs when one funeral home acts as a broker for another funeral home, frequently one that is out of state.

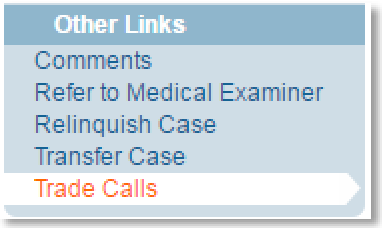
The Trade Calls page in the DAVE™ application supports the trade calls practice by allowing dual ownership of death records. Users from either funeral home will be granted the same security access to the case with the exception of the funeral director and funeral home fields located on the Disposition page.

> The ability to select the Trade Calls link is based on user security privileges and is generally restricted to Funeral Directors only.
>
> The Trade Call link is disabled when the record has a status of signed.

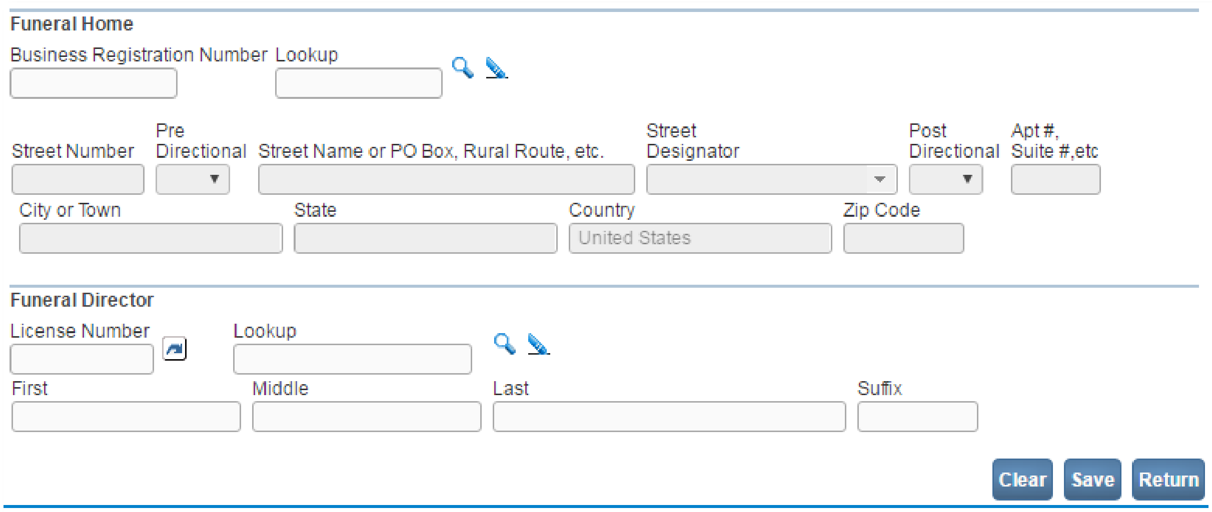
> Key points concerning the Trade Calls page:
>
> - The funeral home responsible for Disposition should start the record in DAVE™ and initiate the Trade Call.
> - The funeral home on the Trade Calls page cannot change the funeral home listed on the Disposition page.

Steps to Set-up the Trade Call

1. From the Death Registration Menu select *Other Links* > *Trade Calls*.



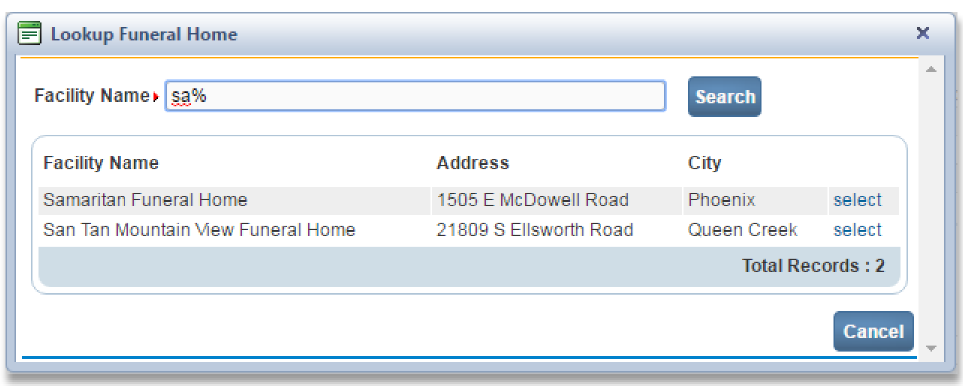
The *Trade Calls* page displays.



2. Select the Lookup icon next to the *Funeral Home Lookup* field to launch the *Lookup Funeral Home* window.

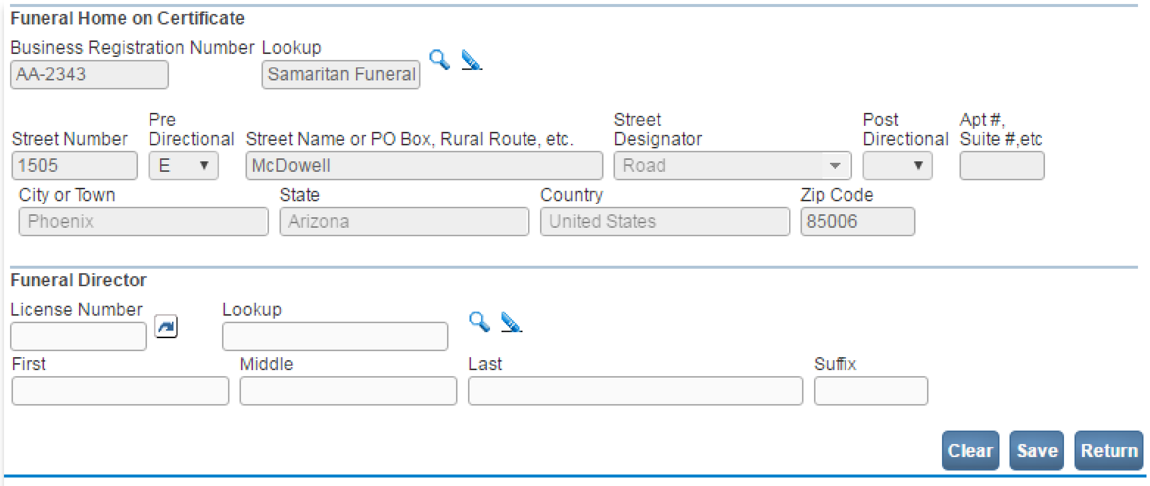
3. In the *Faclity Name* field enter the full name of the facility, if known, and select the *Search* button.

If the full name of the facility is not known, **enter the first two letters, a percent sign (%)**, then **select search** to perform a wildcard search.



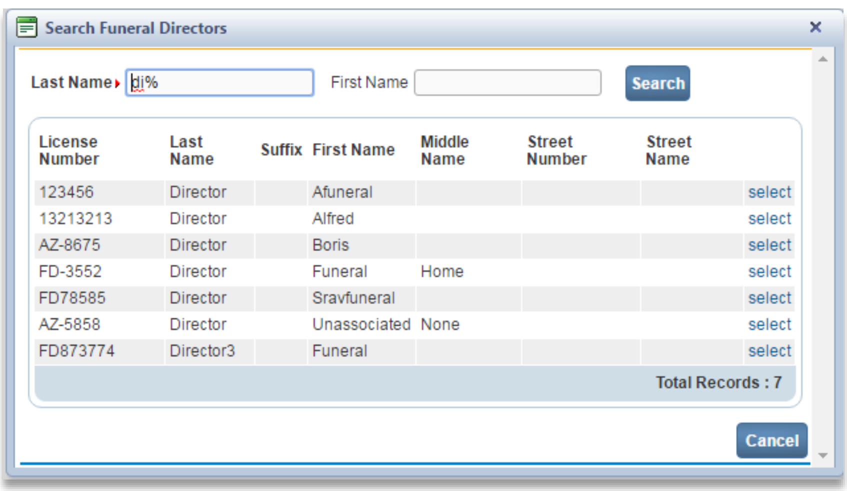
4. A list of available facilities will be returned. **Select the *Select* link** next to the correct facility in the list.

The selected funeral home information will be auto-populated on the *Trade Calls* page.



5. Select the Lookup icon next to *Funeral Director Lookup* to access the *Search Funeral Directors* page.

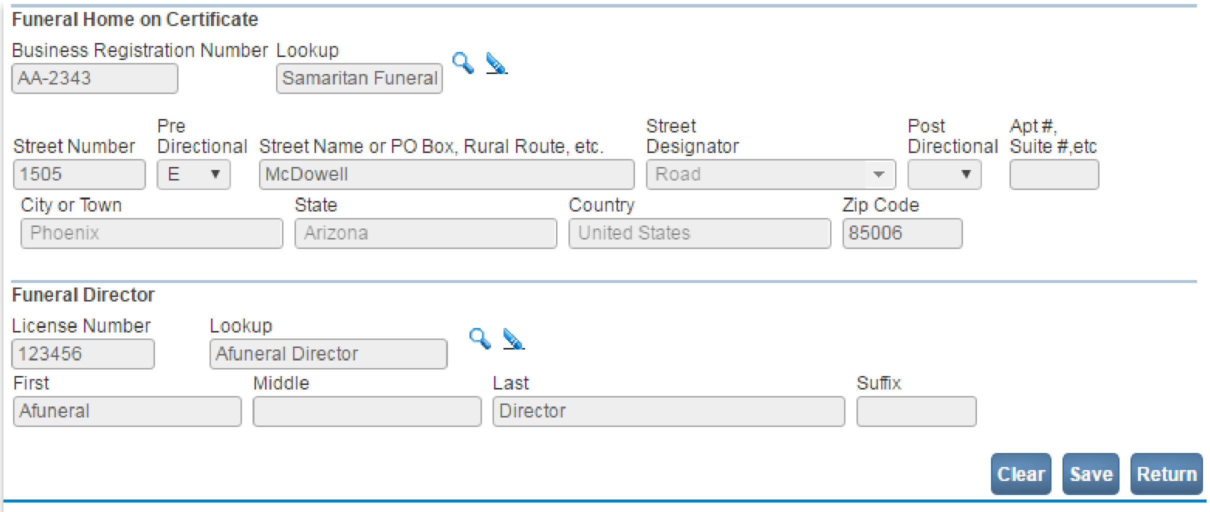
6. Enter in the *Last* and *First Name* of the certifier; if known. If not known a wildcard search can be performed by entering at least two characters in the *Last* name field followed by %.



License Number	Last Name	Suffix	First Name	Middle Name	Street Number	Street Name	
123456	Director		Afuneral				select
13213213	Director		Alfred				select
AZ-8675	Director		Boris				select
FD-3552	Director		Funeral	Home			select
FD78585	Director		Sravfuneral				select
AZ-5858	Director		Unassociated	None			select
FD873774	Director3		Funeral				select

7. From the *Search Results List* select the link next to the correct Funeral Director.

The selected funeral director information will be populated on the trade calls page.



If either the Funeral Director or Funeral Home are out-of-state, the information can be manually keyed rather than selected using the lookup tool.

To complete the Trade Calls page, select *Save* to save changes and complete the trade. If both funeral homes use DAVE, they will now share ownership of the personal information. Allowing both funerl homws to have access to work on the record.

Selecting **Clear** will clear all information that has been entered on the page.
Selecting **Return** will return the user to the last page they took action on.

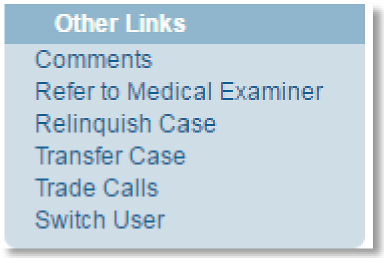
8.21 Switch User

Many processes performed in the registration and issuance of vital events requires participation by multiple individuals with different roles and security privileges. In order to make the processes more efficient, DAVE™ shall provide the ability to allow users to switch users without exiting the application.

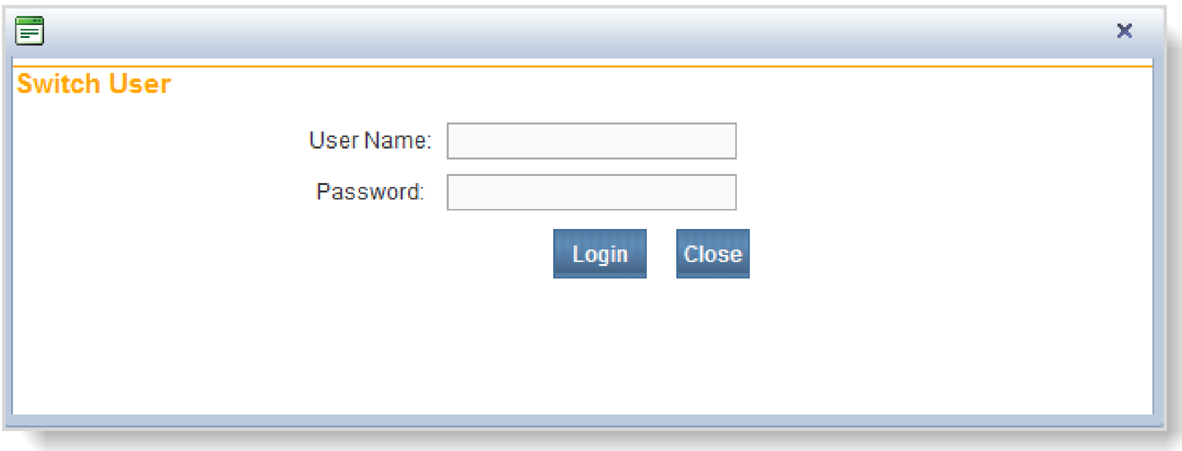
Examples of user accounts that are commonly switched are as follows:

- Funeral home clerk to funeral home user and vice versa
- Medical facility clerk to medical certifier and vice versa
- Order processing clerk to order processing supervisor
- Amendment clerk to amendment supervisor

From the *Other Links* sub-menu, select the *Switch User* link.



The Switch User login page displays.



The user temporarily signing in will enter their user name and password. If the user name and password are valid, DAVE™ will switch the login to that of the new user while remaining on the same page as the previous user.

The user being switched to must be a user who is associated to the same office as the current user.

Exceptions to the information and page that displays after a switch occurs:

1. If the user being switched to is not associated to the same office as the current user an eror shall be displayed: “Switch to user must be in the same office as current user.”

2. If the user being switched to does not have the required security access to view the same registration, an error shall be displayed: “Switch user is unable to load this registration as you do not have permission to access it.”

3. If the user being switched to does not have the required security access to view the same order, an error shall be displayed: “Switch user is unable to load this order as you do not have permission to access it."

4. If the user being switched to does not have the required security access to view the currently displayed registration page the following pages will be displayed instead:

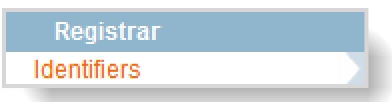
Death	Decedent Page
Fetal Death	Fetus

5. If the account of the user being switched to has expired, an error shall be displayed: “Cannot switch users. Password has expired or requires changing.”

9. Registrar Information

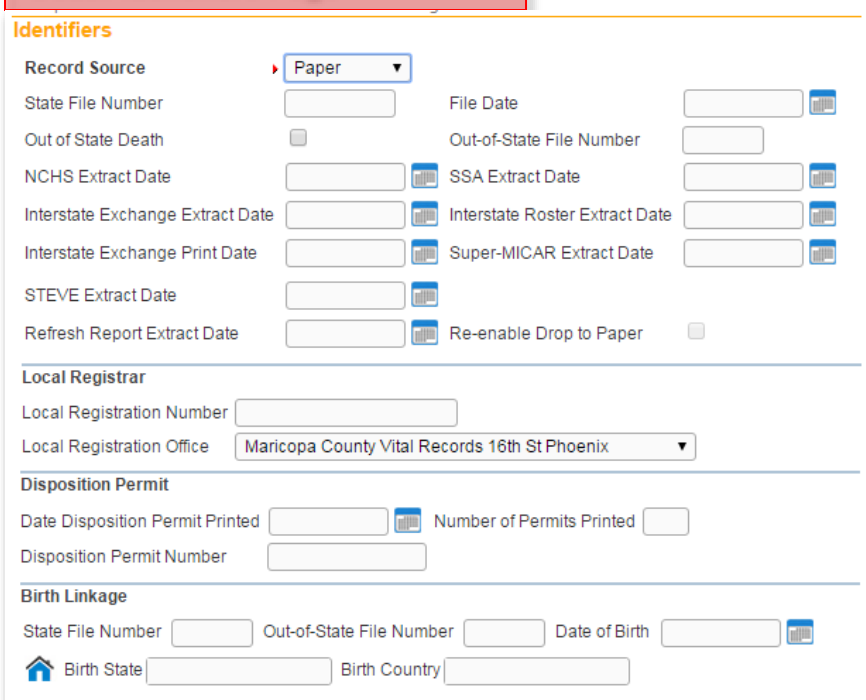
9.1 Identifiers

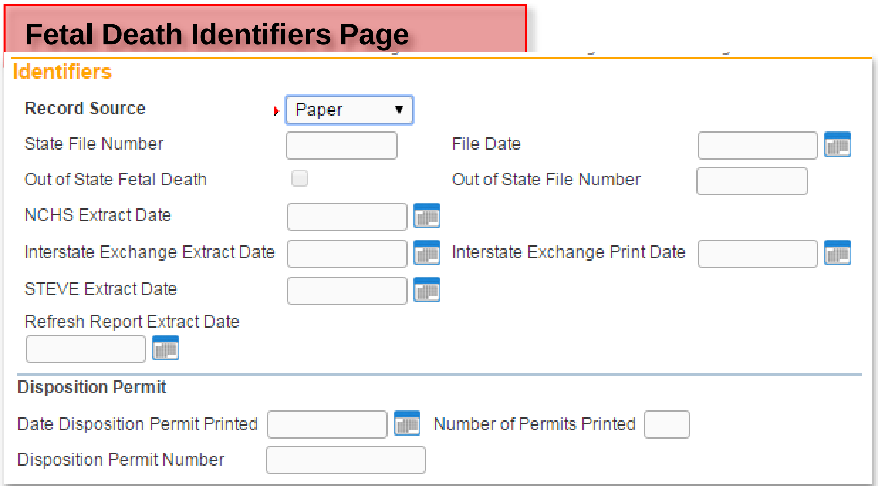
The Identifiers page is used to store and display registration-related information accessible only at the state level. Some fields on the page may be system-filled as the case is processed and registered in DAVE™. Some fields may be edited manually.



From the *Registrar* sub-menu select the *Identifiers* page*:*

Death Identifiers Page





Shared Identifier Page Fields

Record Source is set when a case is started in DAVE™. A *Record Source* of *Paper* indicates that the State or County office completed the record from a piece of paper received. A *Record Source* of *Electronic* indicates that a funeral home, medical facility, or medical examiner started the record and it was completed electronically.

State File Number and **File Date** are automatically assigned and system-filled once a case has been registered. These items are typically automatically completed, but user's with appropriate security privileges assigned can edit these fields.

The **Out of State Death** or **Out of State Fetal Death** checkbox and **Out of State File Number** are selected and completed when the record is an Out of State Record. These items are typically automatically completed, but user's with appropriate security privileges assigned can edit these fields.

The folllowing items are system-filled when the record information is pulled and included in any of the related extract jobs: **NCHS Extract Date, SSA Extract Date, Interstate Exchange Extract Date, STEVE Extract Date, Refresh Report Extract Date.**

The **Interstate Exchange Printe Date** is system-filled when an Interstate Exchange record has been printed for the selected case.

Date Disposition Permit Printed is system-filled with the date the permit is printed. **Number of Permits Printed** is system-filled and indictaes the number of disposition permits printed. **Disposition Permit Number** is system-filled and indicates the number assigned to the permit. These items are typically system-filled, but users with appropriate security privileges can edit these fields.

Identifier Page Fields Related to Death Only

The folllowing items are system-filled when the record information is pulled and included in any of the related extract jobs: **Super-Micar Extract Date, Insterstate Roster Extract Date**.

The **Local Registration Number** may be entered manually or system-filled. The **Local Registration Office** is system-filled with the County associated to the place of death listed on the record.

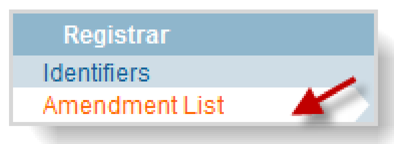
The *Birth Linkage* section contains fields for recording data and information in regards to a matched birth record. The **State File Number** is the number associated to the matched birth certificate, and is only system-filled if the matched record occurred in-state. The **Out of State File Number** is the state file number assigned to the matched birth record and is only system-filled if the matched record is out-of-state. **Date of Birth** displays the date listed on the matched birth record. **Birth State** and **Birth Country** display the state and country found on the matched birth record. These items are typically system-filled but users with appropriate security privileges may edit these fields.

9.2 Amendment List

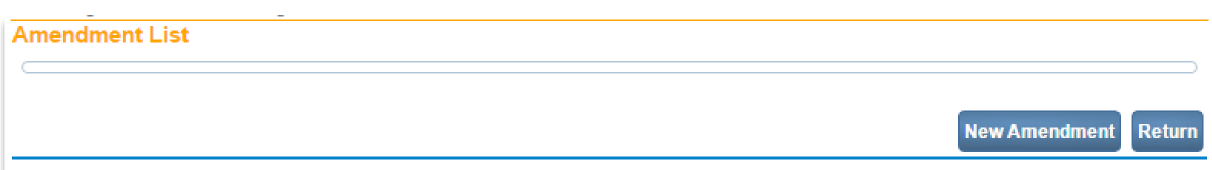
The Amendment List page is informational and allows a user to review any amendments associated with the record.

The ability to select the Amendment List link is based on user security privileges.

From the *Registrar* sub-menu select the *Amendment List* page link*:*

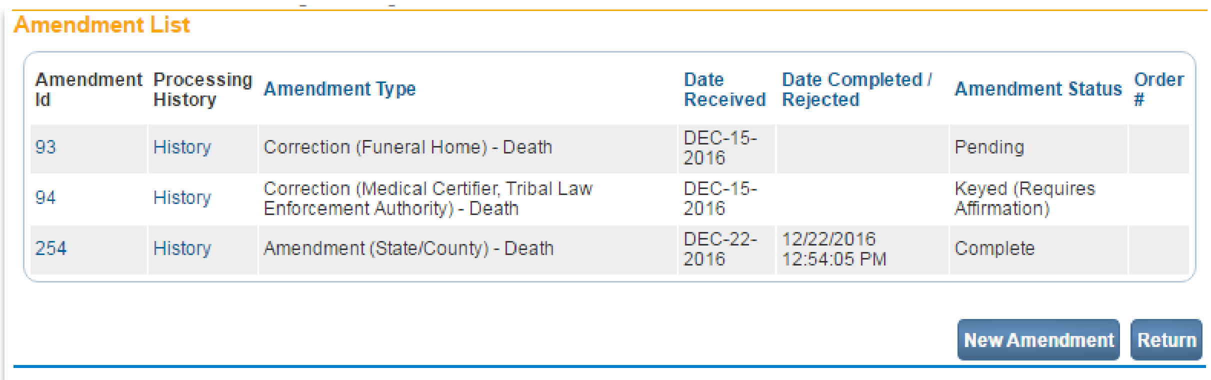


If no Amendments are currently associated to the record, the Amendment List page will appear blank.



The New Amendment button may be selected to start a New Amendment associated to the record. Please see section *8.1 Amendments* for more information in regards to the Amendments process.

If amendments exist for the record, the Amendment List page will display them in a grid view.



Amendment List

Amendment Id	Processing History	Amendment Type	Date Received	Date Completed / Rejected	Amendment Status	Order #
93	History	Correction (Funeral Home) - Death	DEC-15-2016		Pending	
94	History	Correction (Medical Certifier, Tribal Law Enforcement Authority) - Death	DEC-15-2016		Keyed (Requires Affirmation)	
254	History	Amendment (State/County) - Death	DEC-22-2016	12/22/2016 12:54:05 PM	Complete	

New Amendment Return

The Amendment Id and Processing History columns contain links that, when selected, take the user into the specific amendment to continue processing or review the items amended.

10. Order Processing

Vital Records are the legal documents which preserve information about the vital events of people in our society. The issuance of certified copies of vital event records, primarily birth and death, is an integral part of the services provided by a Vital Records agency. Certified copies of vital records are used for legal and administrative purposes. Most jurisdictions require the completion of an application, which serves several purposes, for each certificate requested.

The order application is used to locate the certificate, to verify the applicant's eligibility, and to detect and prevent fraud. Fraudulent requests for vital records are often not discovered immediately; therefore it is necessary to retain applications permanently or for an extended period of time. As a result, DAVE™ retains all application information provided by the customer including information related to the certificate requested.

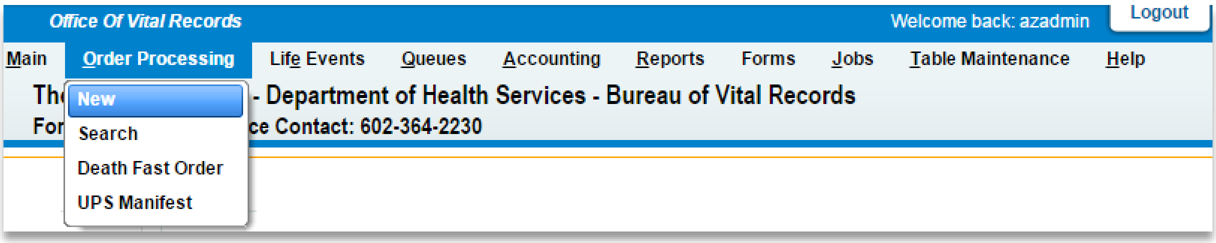
The *Order Processing* pages are used to process and track customer orders for certified copies of vital records. Users with the appropriate security privileges will be able to enter customer orders (including payments), search for events, or print and issue certificates.

Order Processing information is distributed across several pages in DAVE™, beginning with *Applicant* and continuing to *Match Events*, *Services, Payments*, *Order Summary*, and Issuance History.

Later sections will cover accounting, which includes the processing of the payment part of orders, balancing a cash drawer, and reconciling the day's transactions.

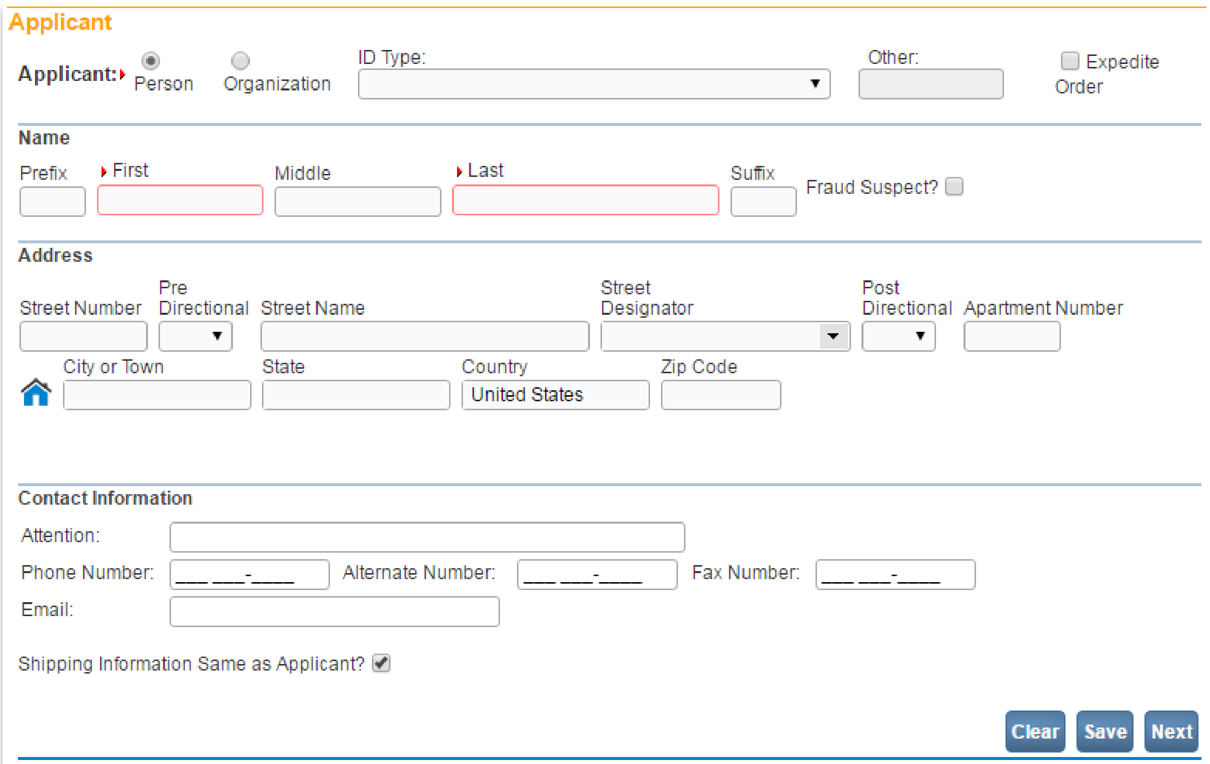
10.1 Process a New Order

From the *Main Menu* select *Order Processing* and then select *New*.



10.2 Applicant

The *Applicant* page will be displayed.



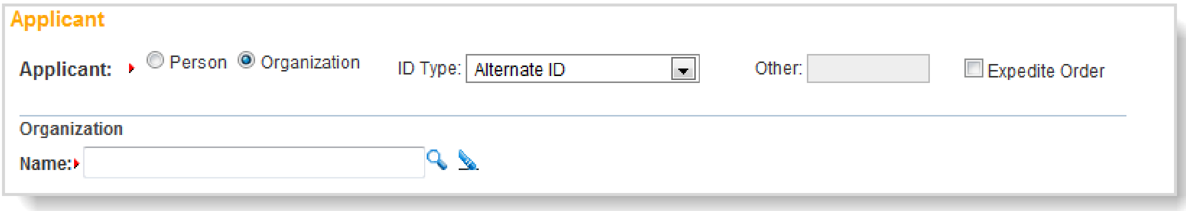
The Applicant page is used to gather information on the person requesting the service. Complete as much information about the applicant as is known.

If the user is an external user and has accessed the order processing module via the *Order Certified Copies* feature, the applicant page will be system-filled with the office the user selected at login.

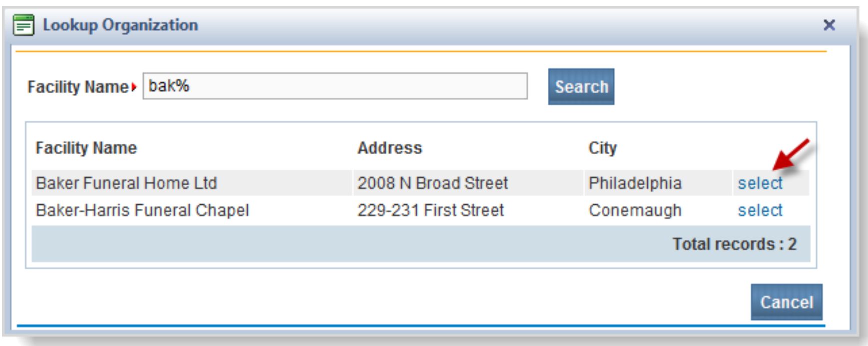
The applicant can be either an *Organization* or a *Person*. From the two radio buttons at the top of the *Applicant* page, select which *Applicant* type will be ordering.

Organization as an Applicant

For Hospitals, Government Offices, and/or other Vital Records partners requesting certified copies of records and other services, choose the *Organization* radio button on the *Applicant* page. Doing so reveals the required *Organization Name* field.

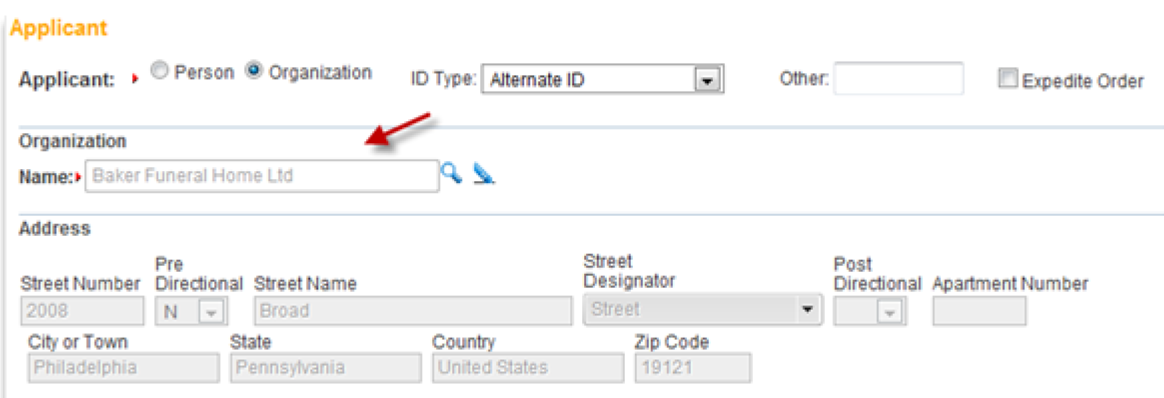


1. Select the LOV Lookup tool to access the Facility lookup page. The Lookup Organization pop-up will be displayed.



2. Enter the name of the facility if known. If unknown, enter at least one letter followed by the wildcard % symbol. Select the *Search* button to display a list of facilities. Click the *select* link adjacent to the desired facility.

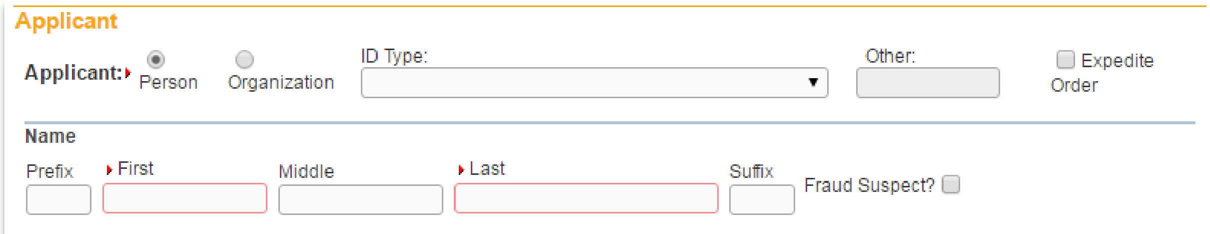
3. Once selected, the Facility information populates the Organization *Name* and *Address* fields on the Applicant page. Select *Save* to save changes.



If the Organization is not found in the list, the Organization Name and Address can be manually entered on the screen.

Person as an Applicant

For applicants that are individuals and not associated to an Organization select the Person radio button as the Applicant type. Doing so reveals the required *First* and *Last Name* fields for manual entry.



The only required fields on the *Applicant* page, when *Person* is selected as the *Applicant,* are the *First* and *Last Name* fields. However, the more information provided, the easier it will be to contact the customer if follow-up is needed

Remaining Applicant Page Items

Id Type - Displays a list of standard forms of identification that are acceptable when requesting vital event records.

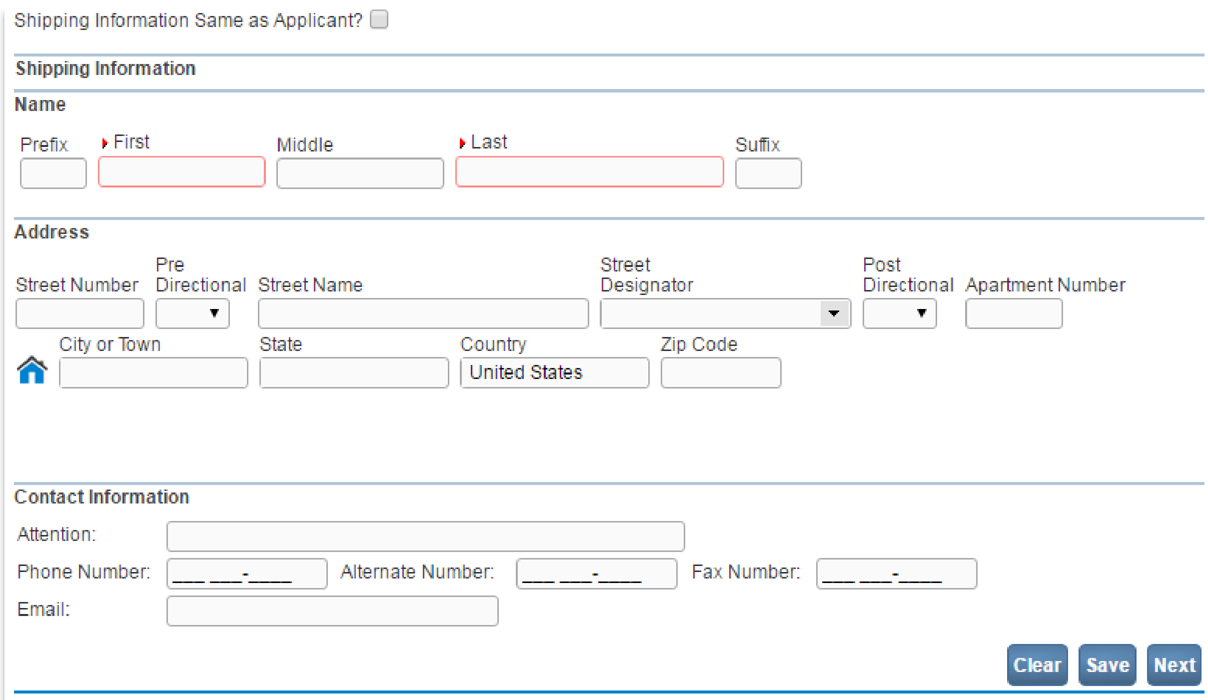
Expedite Order - The *Expedite Order* checkbox is used to flag a rush order. The order is placed in the Issuance Queue with all other orders, but when the *Priority* filter is used, only those marked as *Expedite Order* are returned. The order approval and completion process for expedited orders takes priority over other orders within the Issuance Queue.

Fraud Suspect – If the applicant is found to be suspect of fraud, this checkbox can be selected. This triggers a fraud suspect validation rule on this and any subsequent orders the applicant submits.

Address - This is the address information of the applicant.

Contact Information - This is the contact information of the applicant. If the applicant is an organization and the organization is selected from the LOV, this information will be system filled from the organization information stored in DAVE™.

Shipping Information Same as Applicant - DAVE™ is set to automatically select this checkbox which assumes that the shipping address will be the same as the applicants address. If the shipping address differs from the applicant address, uncheck this selection and the page will display a section in which to collect shipping address information. Additional contact information is also made available to collect if needed.



Once the *Applicant* page is complete, choose a navigation button at the bottom of the page:

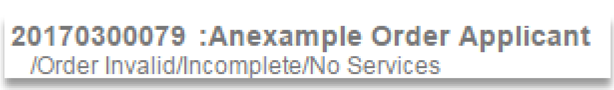
Most often selection of the *Next* button will be used to save what has been entered and proceed to the next page.

Other options include selection of: the *Clear* button to clear all entries, the *Save* button to save changes without leaving the page.

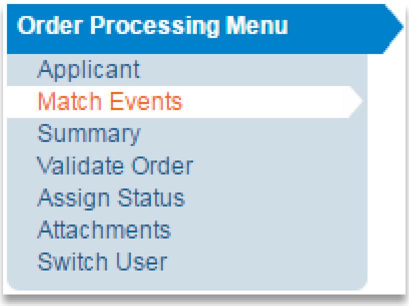
Upon selection of *Save* or *Next* the Order will:

- Be assigned a unique order number is assigned consisting of a four digit year + two digit month + five digit sequential number (i.e., 20100600032). The system-assigned order number is displayed at the top of all order processing pages at the top of the Order Status Bar.

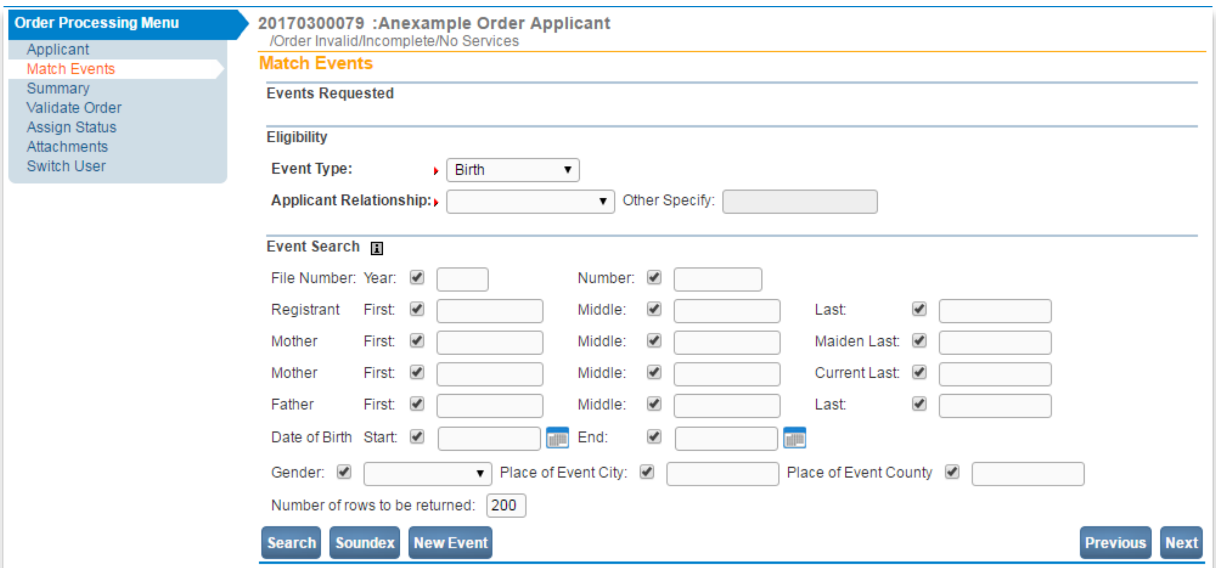
- Be initially validated and assigned Order and Issuance statuses of Invalid and Incomplete. The Order and Issuance statuses will be displayed in the Order Processing Status bar, just under the Order Number and Applicant Name.



- Display the Order Processing menu. The Order Processing Menu leads the user through the pages necessary to process an order.



- Display the Match Events page.



10.3 Match Events

The *Match Events* page has three sections, *Events Requested*, *Eligibility*, and *Event Search*.

Events Requested: Initially, the Events Requested section is empty. It will be populated after the Eligibility and Event Search sections are complete and search performed.

Eligibility: The Eligibility section is used to determine the Event type and Applicant Relationship. Based on these two items, the applicant's eligibility to receive the service(s) requested can be determined.

> ⚠ It is important to select the *Event Type* before choosing an Applicant Relationship. The *Event Type* affects the values available for selection within the *Applicant Relationship* dropdown.

Event Search: The Event Search section offers a number of fields that can be used to locate the record for which service is being ordered.

10.3.1.1 Eligibility and Event Search

1. First, select the Event Type as this determines what Applicant Relationship types and what Event Search fields are available.

2. Next, select the Applicant Relationship type from the LOV.

3. Enter all information available for the Event Search fields.

> It is best to enter all information provided from the applicant regarding the Event Search items. Each Order becomes a historical record of the complete application submitted for services. If follow-up is needed, the more information available the better.

4. Once Event Search fields are completed, select or de-select the checkboxes next to each field which contains an entry.

    a. Selecting a checkbox will include that item in the system performed Search for the record.
    b. De-selecting a checkbox will excluded that item in the system performed Search for the record.

   DAVE™ only looks for matches on elements selected with a checkmark. If text is entered in a field, but the checkbox next to the field is not selected, the field will not be included in the search.

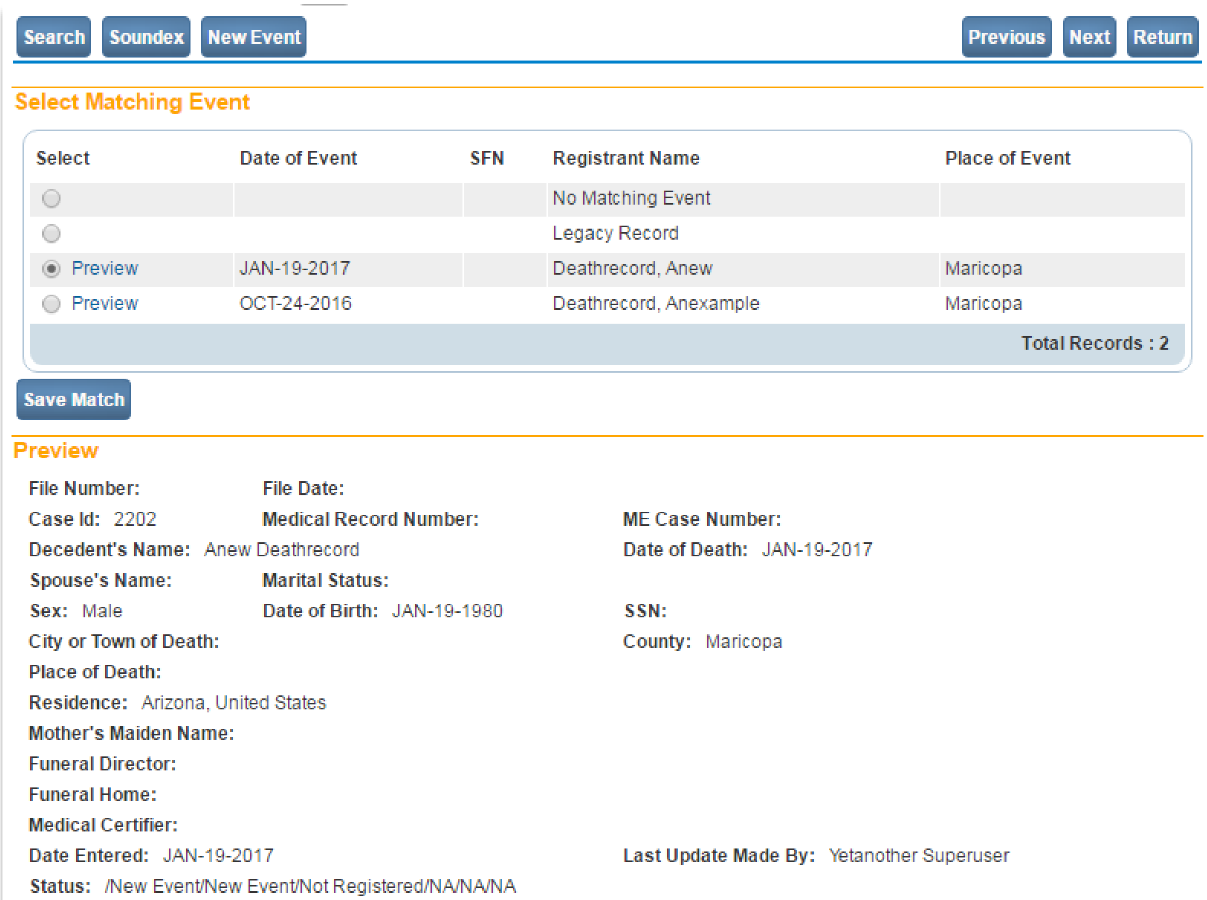
   > It is not necessary to deselect checkboxes for any field left blank. If a field is left blank, it is not used in the search.

5. Once the *Event Search* information is complete, choose from the Event Search navigation button at the bottom of the page:

   Most often selection of the *Search* button will be used to search, using the selected Event Search items, within the Event Type selected.

   Other options include selection of: the *Soundex* button to search for names that sound like those entered, the *New Event* button is used to add an additional *Event Request* to the Order.

6. Once the Search is performed, the Match Event page expands, below the Event Search section, to display the Select Matching Event section.


Search | Soundex | New Event | Previous | Next | Return

Select Matching Event

Select	Date of Event	SFN	Registrant Name	Place of Event
○			No Matching Event	
○			Legacy Record	
◉ Preview	JAN-19-2017		Deathrecord, Anew	Maricopa
○ Preview	OCT-24-2016		Deathrecord, Anexample	Maricopa

Total Records : 2

Save Match

Preview

File Number: **File Date:**
Case Id: 2202 **Medical Record Number:** **ME Case Number:**
Decedent's Name: Anew Deathrecord **Date of Death:** JAN-19-2017
Spouse's Name: **Marital Status:**
Sex: Male **Date of Birth:** JAN-19-1980 **SSN:**
City or Town of Death: **County:** Maricopa
Place of Death:
Residence: Arizona, United States
Mother's Maiden Name:
Funeral Director:
Funeral Home:
Medical Certifier:
Date Entered: JAN-19-2017 **Last Update Made By:** Yetanother Superuser
Status: /New Event/New Event/Not Registered/NA/NA/NA

Within the newly displayed Select Matching Event section, the potential matching records are listed with Preview links beside them. Selecting a radio button, or the preview link, next to a listed potential match will display the Preview page. The Preview page contains details about the record selected and can be compared to the Event Search items entered, to ensure a correct match is found.

10.3.1.2 Select Matching Event

The Select Matching Event pane displays the search results

The *No Matching Event* and the *Legacy Record* rows are displayed at the top of the Select Matching Event search results table.

No Matching Event should be selected if no results are returned or if none of the matches are the desired record.

Legacy Record should be selected if it is known that the case is on file within the jurisdiction, but is not in the DAVE™ database. These cases are usually on paper or other non-electronic media only.

The following event types are excluded from the search results list within the Select Matching Event page: Out-of-state, Voided, and Abandoned.

Selecting a Match

If a correct match is found within the search results list, select the radio button next to the match.

Select Matching Event

Select	Date of Event	SFN	Registrant Name	Place of Event
○			No Matching Event	
○			Legacy Record	
◉ Preview	FEB-09-2017		Deathrecord, Anew	Maricopa
○ Preview	JAN-05-2017		Deathrecord, Anexample	Maricopa
○ Preview	JUN-14-2017		Deathrecord, James	Maricopa
				Total Records : 3

Right below the Select Match Event pane in the Images pane. The Images pane will display any images that exist for the selected Matched Event. If no images exist then the Images page will only list the *Issue from electronic record* selection.

Images

Select	Image Id	Name	Date of Event
○	Issue from electronic record		
			Total Records : 1

If an image, or images, exist for the selected Matched Event, the Images pane will list these images.

Select Matching Event

Select	Date of Event	SFN	Registrant Name	Place of Event
○			No Matching Event	
○			Legacy Record	
◉ Preview	JUL-01-1949	102-1949-031116	CHARLEYX, ALVINX X	NAVAJO
				Total Records : 1

Images

Select	Image Id	Name	Date of Event
○	Issue from electronic record		
○	4129550	CHARLEYX, X ALVINX	Jul-01-1949
			Total Records : 1

To issue from the electronic record and not the image, select the radial button next to the *Issue from electronic record* option.

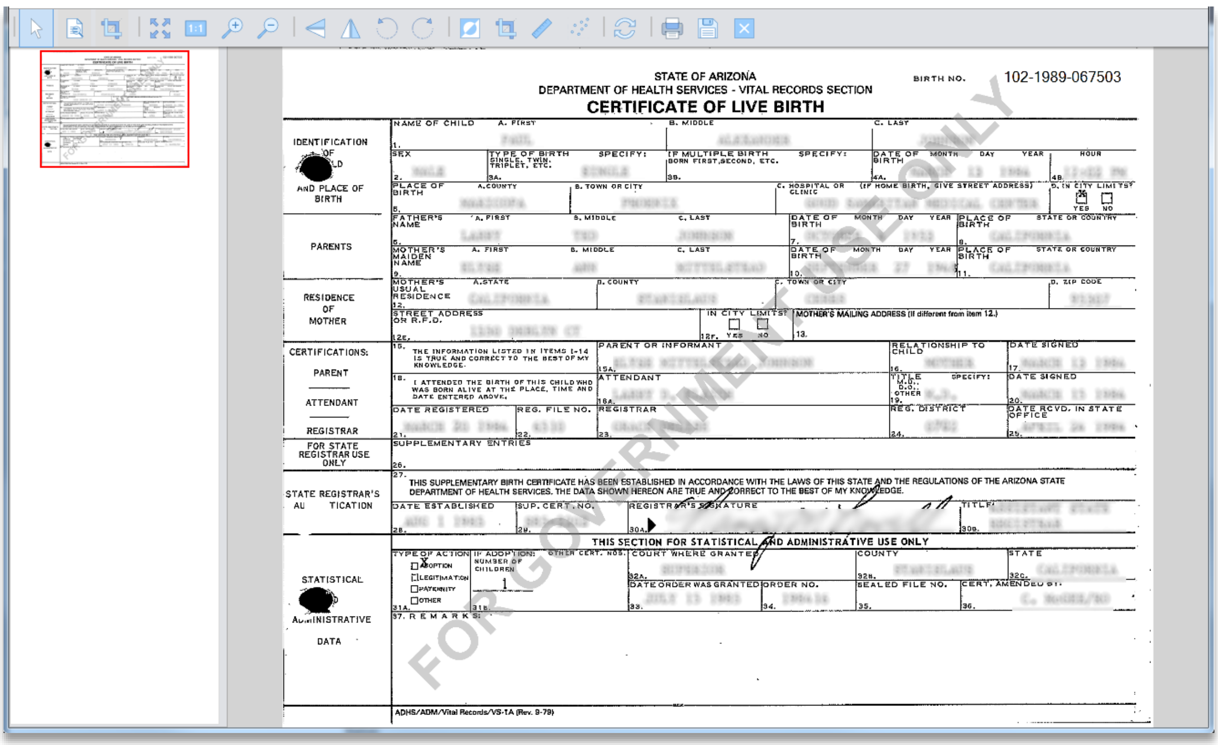
Otherwise, select the radial button next to the listed Image.

Images

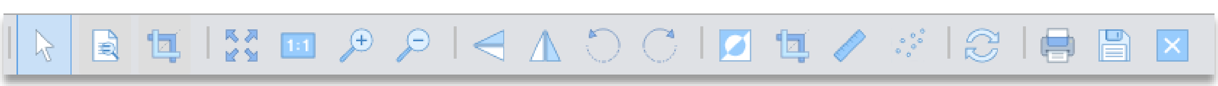
Select	Image Id	Name	Date of Event
○	Issue from electronic record		
○	4129550	CHARLEYX, X ALVINX	Jul-01-1949
			Total Records : 1

10.3.1.2.1 Edit Image Selection

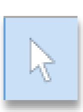
Upon select of the radial button next to a listed image within the Images pane the Image Editor control will be presented with the selected image displayed.



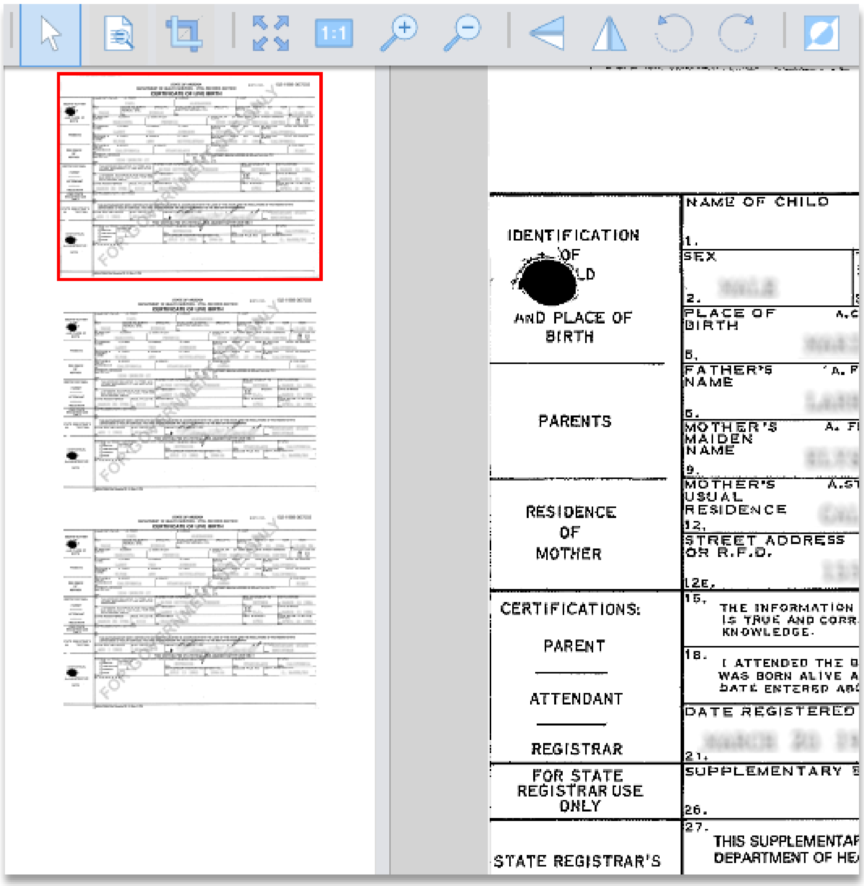
10.3.1.2.2 Image Editing Controls



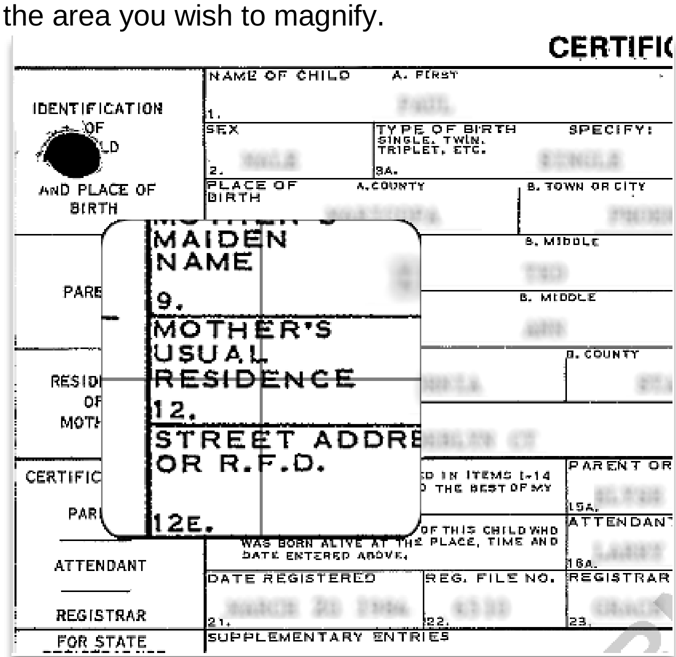
The Image Editor Controls are located across the top of the image editor.



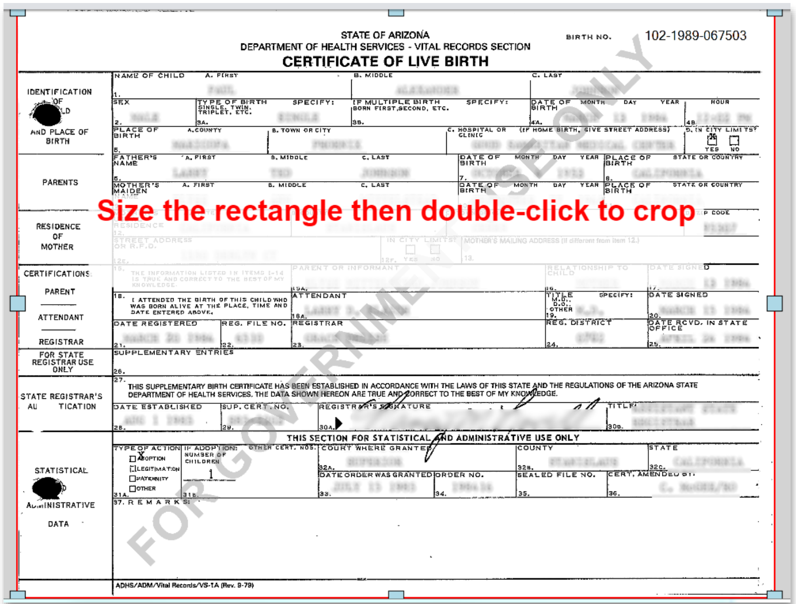
Select: If more than one page of images are displayed, this tool allows you to select an image from the left menu of the Image Editor tool.



Magnify: The magnifying tool provides magnification of a selected area of the image. Simply select the magnifying tool and hold the left mouse button down over the area you wish to magnify.



Crop: Selecting this tool will place a rectangle on the page which can be used to crop the image. Simple adjust the size of the rectangle then double-click the left mouse button to crop the image.



Fit: Selecting this button will fit the full image to display on the screen if it is displaying larger than the frame of the image editor itself.

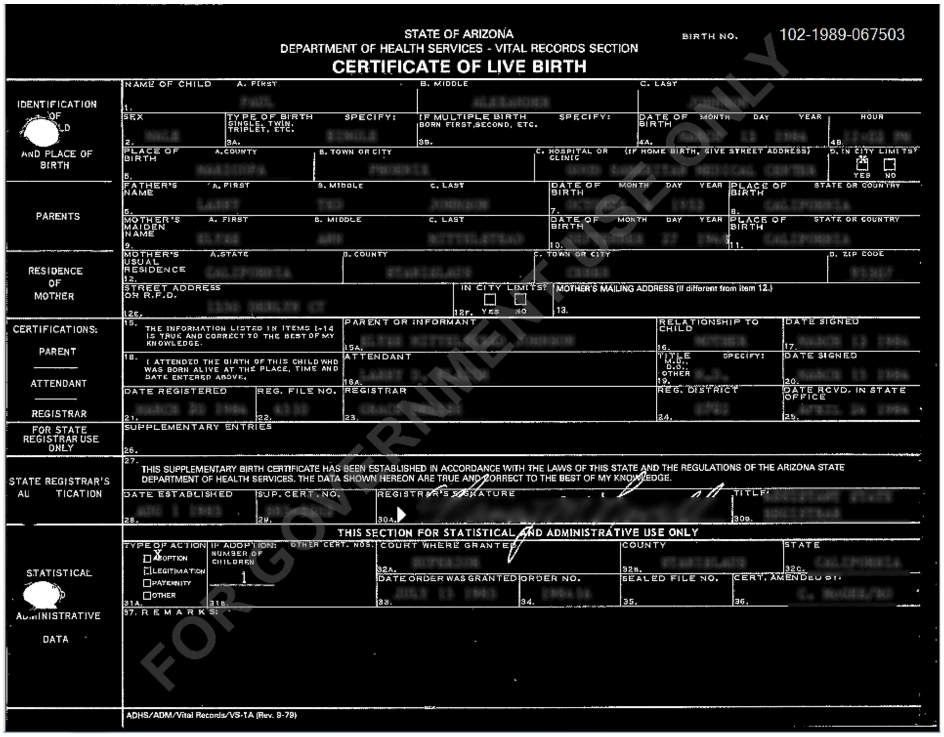
Actual Size: Selecting this button will display the image at its actual size, which may be larger than the frame of the image editor.

Zoom In or Zoom Out: These buttons allow you to zoom in and out on the image.

Flip or Reverse: These buttons allow you to flip the image or reverse (mirror) the image display.

Rotate: These buttons allow you to rotate the image counter-clockwise or clockwise.

Invert: This button will invert the image to display in the negative colors of what is currently displayed.


STATE OF ARIZONA
DEPARTMENT OF HEALTH SERVICES - VITAL RECORDS SECTION
CERTIFICATE OF LIVE BIRTH
BIRTH NO. 102-1989-067503

IDENTIFICATION OF CHILD AND PLACE OF BIRTH — 1. NAME OF CHILD A. FIRST B. MIDDLE C. LAST; 2. SEX; 3A. TYPE OF BIRTH SINGLE, TWIN, TRIPLET, ETC.; SPECIFY; 3B. IF MULTIPLE BIRTH BORN FIRST, SECOND, ETC.; SPECIFY; 4A. DATE OF BIRTH MONTH DAY YEAR; 4B. HOUR; 5. PLACE OF BIRTH A. COUNTY B. TOWN OR CITY C. HOSPITAL OR CLINIC (IF HOME BIRTH, GIVE STREET ADDRESS) D. IN CITY LIMITS? YES NO

PARENTS — 6. FATHER'S NAME A. FIRST B. MIDDLE C. LAST; 7. DATE OF BIRTH MONTH DAY YEAR; 8. PLACE OF BIRTH STATE OR COUNTRY; 9. MOTHER'S MAIDEN NAME A. FIRST B. MIDDLE C. LAST; 10. DATE OF BIRTH MONTH DAY YEAR; 11. PLACE OF BIRTH STATE OR COUNTRY

RESIDENCE OF MOTHER — 12. MOTHER'S USUAL RESIDENCE A. STATE B. COUNTY C. TOWN OR CITY D. ZIP CODE; 12E. STREET ADDRESS OR R.F.D.; 12F. IN CITY LIMITS? YES NO; 13. MOTHER'S MAILING ADDRESS (If different from item 12.)

CERTIFICATIONS: PARENT — 15. THE INFORMATION LISTED IN ITEMS 1-14 IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. 15A. PARENT OR INFORMANT; 16. RELATIONSHIP TO CHILD; 17. DATE SIGNED
ATTENDANT — 18. I ATTENDED THE BIRTH OF THIS CHILD WHO WAS BORN ALIVE AT THE PLACE, TIME AND DATE ENTERED ABOVE. 18A. ATTENDANT; 19. TITLE M.D. D.O. OTHER SPECIFY; 20. DATE SIGNED
REGISTRAR — 21. DATE REGISTERED; 22. REG. FILE NO.; 23. REGISTRAR; 24. REG. DISTRICT; 25. DATE RCVD. IN STATE OFFICE

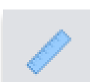
FOR STATE REGISTRAR USE ONLY — SUPPLEMENTARY ENTRIES 26.

STATE REGISTRAR'S AUTHENTICATION — 27. THIS SUPPLEMENTARY BIRTH CERTIFICATE HAS BEEN ESTABLISHED IN ACCORDANCE WITH THE LAWS OF THIS STATE AND THE REGULATIONS OF THE ARIZONA STATE DEPARTMENT OF HEALTH SERVICES. THE DATA SHOWN HEREON ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. 28. DATE ESTABLISHED; 29. SUP. CERT. NO.; 30A. REGISTRAR'S SIGNATURE; 30B. TITLE

THIS SECTION FOR STATISTICAL AND ADMINISTRATIVE USE ONLY
STATISTICAL AND ADMINISTRATIVE DATA — 31A. TYPE OF ACTION: ADOPTION, LEGITIMATION, PATERNITY, OTHER; 31B. IF ADOPTION: NUMBER OF CHILDREN 1; OTHER CERT. NOS.; 32A. COURT WHERE GRANTED; 32B. COUNTY; 32C. STATE; 33. DATE ORDER WAS GRANTED; 34. ORDER NO.; 35. SEALED FILE NO.; 36. CERT. AMENDED BY; 37. REMARKS:

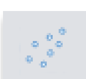
ADHS/ADM/Vital Records/VS-1A (Rev. 9-79)

FOR GOVERNMENT USE ONLY

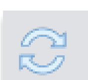


Auto-Crop: This button will automatically crop off excess white space from the select image.

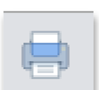
Deskew: This button will automatically adjust the image, straightening it so it is not slanting too far to the right or left.



Despeckle: This button will automatically remove spots and “speckles” from the image.



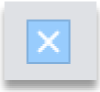
Revert: This button will revert any changes made to the image.



Print: This button will allow you to print the image.

Images printed from the within the Image Editor are not for issuance and will display a Government Use Only watermark.

Save: This button will save all changes made to the image and close out the image editor.



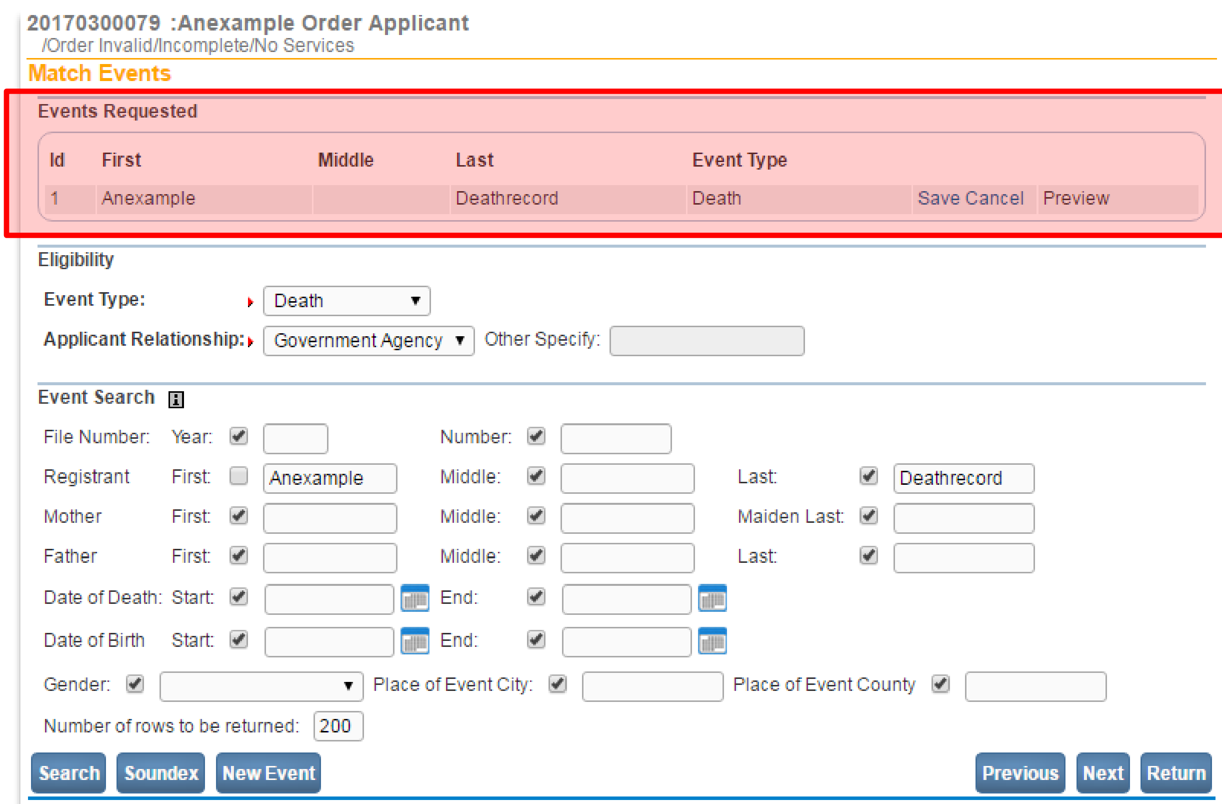
Close: This button will close the image editor without saving any updates made.

All changes made during the image editing process will be used to create and issue the final Certified Copies. Please be sure to select the Save button to saveyour changes before exiting from the image editor.

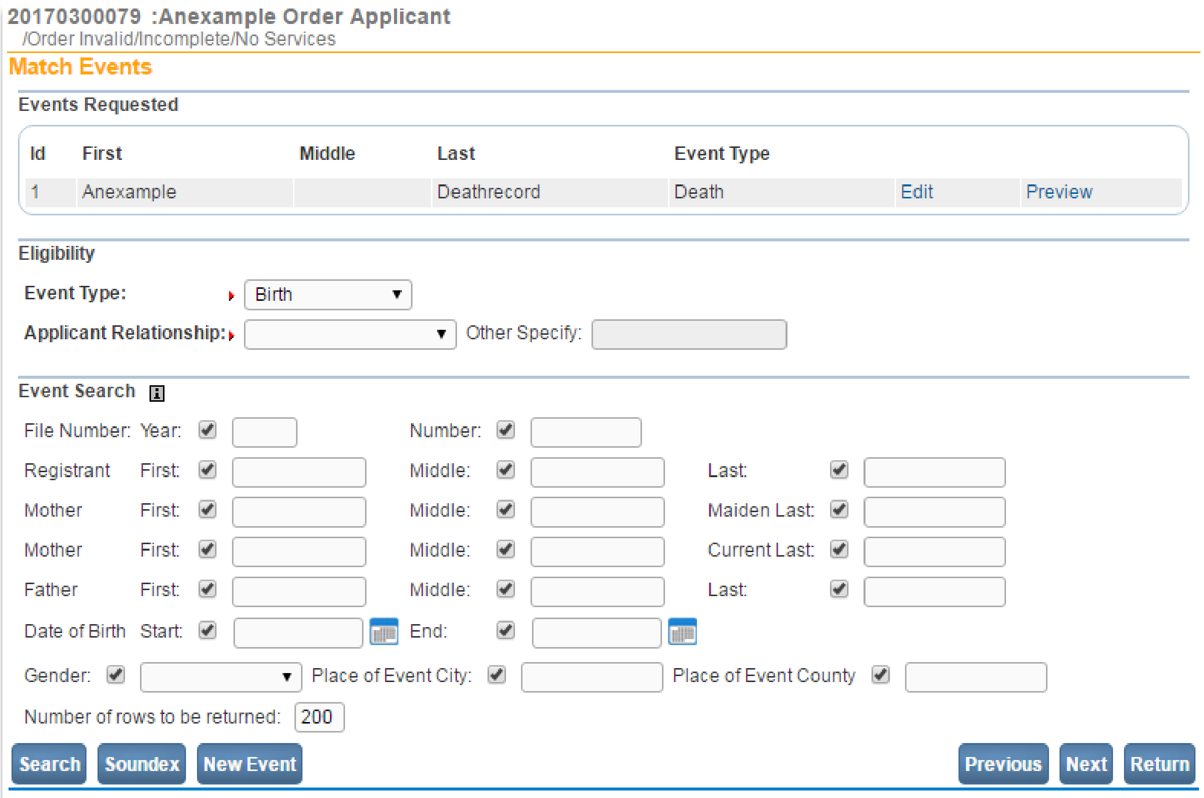
10.3.1.3 Save Matched Event

Once the Matched Event and Image are selected from the Select Matching Event and Images pane, select the Save Match button.

The page will refresh and the Events Requested section, at the very top of the page, will now display the event request information.



If there are additional events to process within this order then, select the New Event button. The Match Event page will refresh and the Eligibility and Match Event section will be open to allow for an additional event to be searched for, matched to, and added to the Events Requested. You can repeat this process as many times as is necessary to add all of the requested events to the Order.

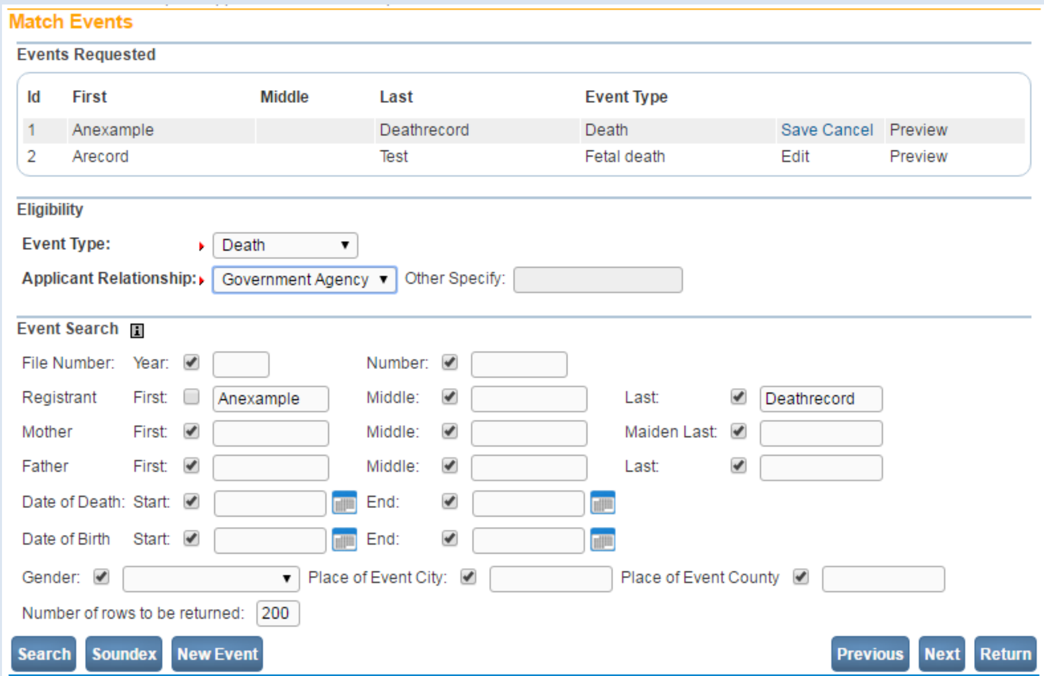


The saved *Match Events* within the *Events Requested* section can be updated if any changes are needed.

Events Requested

Id	First	Middle	Last	Event Type		
1	Anexample		Deathrecord	Death	Edit	Preview
2	Arecord		Test	Fetal death	Edit	Preview

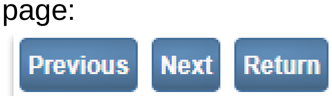
From the *Events Requested* section on the *Match Events* page Select the Edit link next to the requested event that needs to be updated. The *Event Search* section, with the information originally entered, for the selected matched event will be displayed. This information can be updated and a new search performed by selecting the *Search* button.



Upon *Save*, any changes made will be displayed in the *Event Requested* section.

If the event requested already has issuances associated to it then, a *View* link is displayed rather than an *Edit* link. Changes cannot be made after issuances have already been made for the event.

Once the *Match Events* page is complete, choose a navigation button at the bottom of the page:

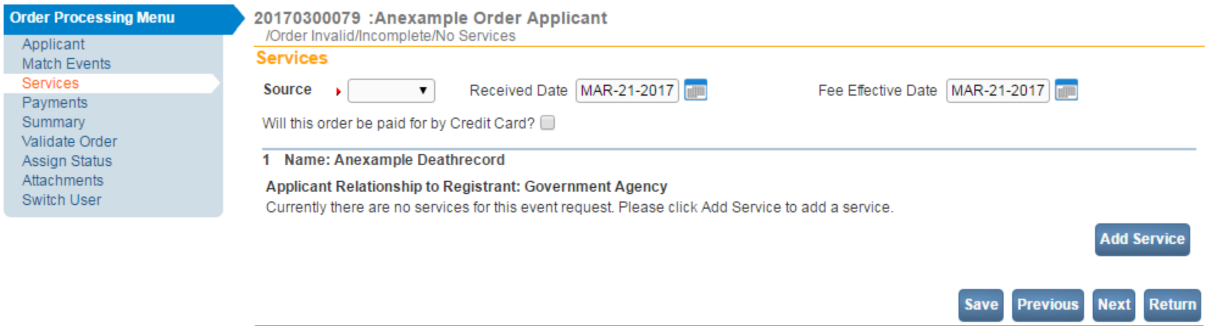


Most often selection of the *Next* button will be used to save what has been entered and proceed to the next page.

Other options include selection of: the P*revious* button to return to the previous page worked on, and the *Return* button to return to the previous page worked on.

10.4 Services

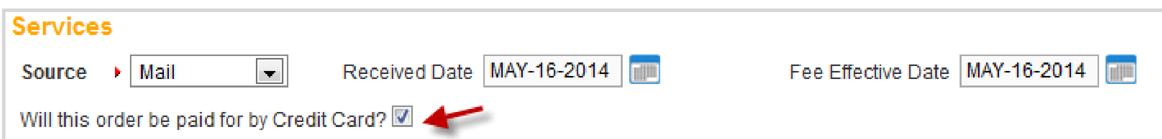
Services requested by the applicant are entered on the Services page. Services refer to the documentation or certified copies being requested by a customer.



10.4.1 Add Services

Source: On the Services page, locate the *Source* dropdown. The source indicates how the order was received.

Will this order be paid for by Credit Card? If customer is paying for the requested service with a credit card, place a checkmark in the *Will this order be paid for by Credit Card* checkbox.



If the Credit Card checkbox is checked by default and disabled, the user may be set up to only allow this type of payment.

This determines if VitalChek fees and Shipping and Handling fees should be applied and displayed on the Payments page. Additionally, this is used to include the credit card payment option in the *Add Payment* dropdown on the Payments page

Received and Fee Effective Date: Use the *Received Date* field to enter the date the request was received. The *Fee Effective Date* is the date on which the fees are to be applied and is used to calculate the fees.

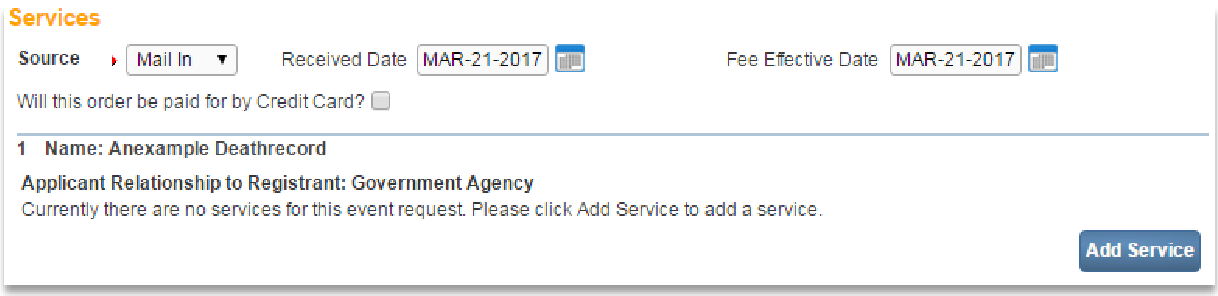
Both *Received Date* and *Fee Effective Date* are automatically populated with the current day's date when the page is opened

These dates are security controlled. Not all users will be able to edit these dates.

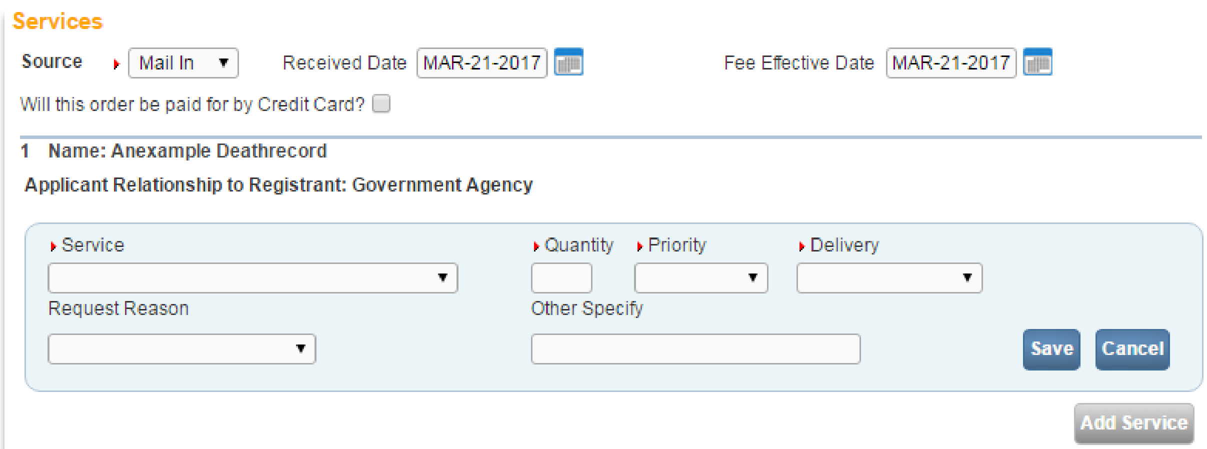
If the order was received prior to the date it was entered, the *Received Date* should be updated to reflect the actual date received. If the fee changed shortly after the order was received, the *Fee Effective Date* should be changed to the date received. For example, if an order received Dec-23-2010 was not entered until Jan-02-2011, and the fees increased by

$5.00 per copy Jan-01-2011, then changing the Fee Effective Date to Dec-23-2010 would allow the customer to be charged the fee effective on the date the order was received.

Add Service: Select the *Add Service* button to select the desired service for this record.



The name section will expand to display the services section.



Service: Select the *Service* (i.e., the type of product the applicant is requesting). The *Service* dropdown is filtered by office and event type.

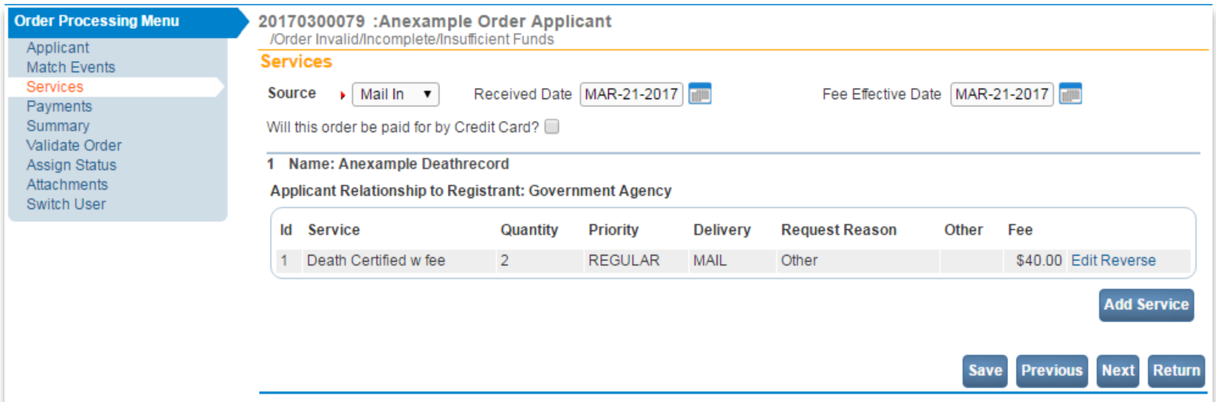
Quantity: Enter the number of the selected service being requested.

Priority: The selection made here determines if the order requires expedited processing and whether additional fees should be applied.

Delivery: Select a method of delivery from the *Delivery* dropdown (i.e., *Counter, Mail, UPS*).

Request Reason: Select the reason for the request from the *Request Reason* dropdown. If Other is selected then the **Other Specify** field will be enabled for entry

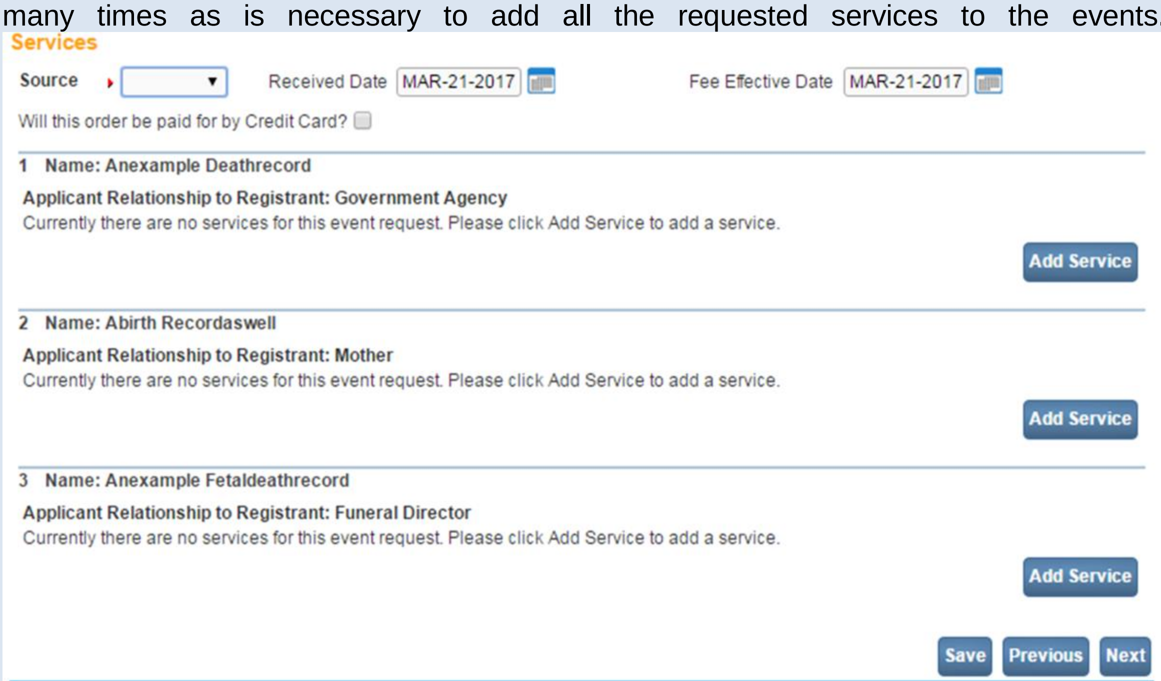
When all information is complete select the *Save* button to save and add the service to the event requested. Or select *Cancel* to close without adding services.



You can add additional Services to the order by selecting the Add Service button again and saving additional services. You can repeat this step as many times as is necessary to get all of the requested services added to the event.

Multiple Events

If your order has multiple requested events, you will need to add services for each event. Simply select the Add Service button under each event to add services. Repeat this as many times as is necessary to add all the requested services to the events.



10.4.2 Editing vs. Reversing a Service

If any errors are found in this service request, click the *Edit* link to make necessary changes. The *Reverse* link is used after a service has been completed and a determination has been made that the applicant is entitled to a reimbursement of fees already paid.

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	
1	Death Certified w fee	2	REGULAR	MAIL	Other		$40.00	Edit Reverse

Edit Service

Upon selection of the *Edit* link, all other buttons and links for other services and events will be disabled and the *Add Service* button will be conditionally enabled based on whether the order has been cashed out. If the order has not been cashed out, the *Add Service* button is enabled. If issuances exist, the *Service* dropdown is disabled. All other values are enabled for editing (except *Delivery* and *Priority* for manual fee services).

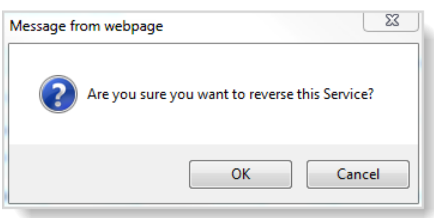
Reverse Service

In order to provide proper auditing of transactions and prevent accounting errors, a service row cannot be deleted if the order has been cashed out. The services table does provide a *Reverse* link for each service entered. The *Reverse* link will be used to reverse the charges and quantity of the service.

The *Reverse* link is disabled if issuances exist for the service. Issuances must first be deleted from the Issuance Queue page in order to enable the *Reverse* link.

The *Reverse* link will be completely disabled if the event request has been rejected.

When selecting the *Reverse* link, the following message is displayed:



Select *OK* to reverse the service. The quantity and fees of the original service are reversed and the *Edit* and *Reverse* links are disabled. Select *Cancel* if you do not wish to reverse the Service.

1 Name: Mark Ryan Mason

Applicant Relationship to Registrant: Creditor

Fees Reversed

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	
1	Death CC	1	REGULAR	MAIL	Marriage		$9.00	Edit Reverse
1	Death CC	-1	REGULAR	MAIL	Marriage		($9.00)	Edit Reverse

Once the Services page is complete, choose a navigation button at the bottom of the page:

Most often selection of the Next button will be used to save what has been entered and proceed to the next page.

Other options include selection of: the Clear button to clear all entries, the Save button to save changes without leaving the page.

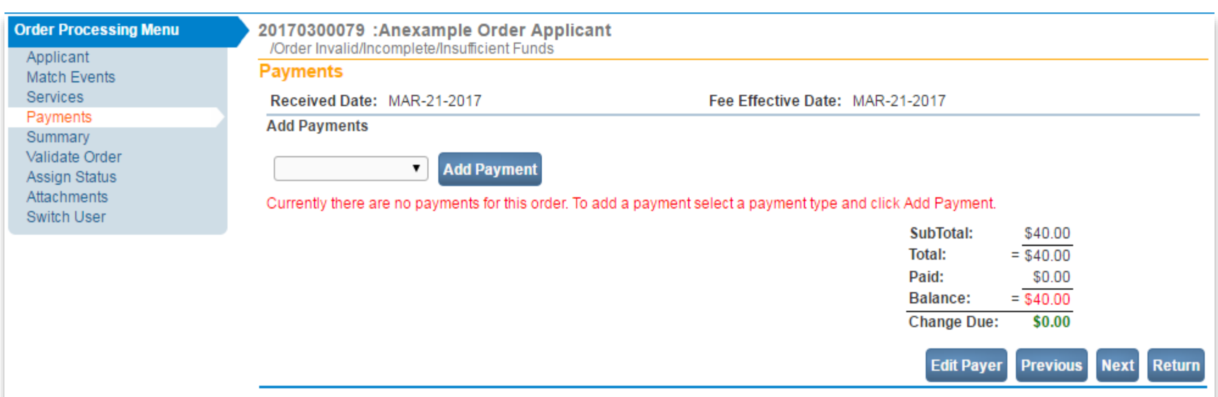
10.5 Payments

Once a record is located and specific services for that record are requested, payment must be collected for any fees that are due. The fees charged for a certified copy of a vital record are defined by law and sometimes go to multiple agencies.

Fees may also be charged for expedited delivery, such as express mail and other expedited couriers like FedEx, UPS, etc, or for expedited services. These fees are often required to be deposited into separate accounts. Additionally, in some jurisdictions local offices may charge more for a service than the state office. In order to support the various combinations of fees, DAVE™ provides the ability to assess fees and collect payments at the service, delivery, priority of service (expedited versus regular), and office levels.

Once a record has been located and specific services have been requested, any/all fees must be collected that are due. DAVE™ is capable of accepting the following payment types: Cash, Check, Money Order, Credit Card, Electronic Funds Transfer, and Invoice. The application also has the ability to Waive or Refund payments.

Any/all payments are entered on the Payments page. Here, the user can add, update, or delete payments for the order. An instructional message appears under the payment dropdown when accessing the Payments page for the first time and no payments have been entered for an order.



Options in the *Add Payment* dropdown depend on security privileges assigned to the user. If a user has not been assigned a specific payment type through the security setup by the System Administrator, the payment type will not be displayed in the *Add Payments* dropdown.

SubTotal:	$50.00
Addt Charge:	+ $5.50
Shipping/Handling Fee:	+ $23.00
Total:	= $78.50
Paid:	$35.00
Balance:	= $43.50
Change Due:	$0.00

The payment summary/totals section displays an *Addt Charge* if the service selected has fees charged at the order level (or the order subject level), that are not VitalChek or delivery fees. An example of this type of fee would be a jurisdiction fee charged for the priority selected, such as an extra rush or expedited service fee.

A *Shipping/Handling Fee* displays when the method of delivery selected for a service has a separate delivery fee associated with it, such as UPS

The first step in completing the Payments page is to select one of the valid payment options from the *Add Payment* dropdown.

Based on the payment type selected, a table displays in which to make the payment. The *Payment Date*, *User*, and payment type (e.g. "Cash," "Check," etc.) are system-filled.

Cash

Payment Date	User	Amount	
MAR-21-2017	azadmin		Save Cancel

Check / Money Order

Payment Date	User	Check #	Type	Amount	
MAR-21-2017	azadmin		Check		Save Cancel

Credit

Payment Date	User	Card Number	Exp Date	CVC	Auth Code	AVS	Status	Amount	
MAR-21-2017	azadmin							40.00	Authorize Cancel

Enter the payment information and select Save, (or Authorize if Credit Card payment). The page will refresh and display the payment applied to the page.

Balance must be equal to $0 before an Issuance link will be enabled on the *Order Summary* page. Order status will remain invalid if balance due is greater than $0.

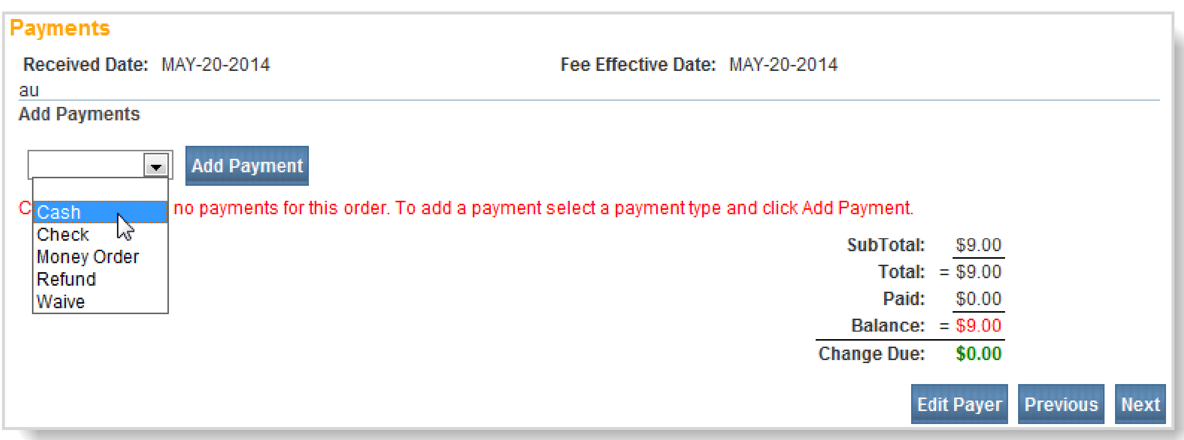
10.5.1 Available Payment Types

10.5.1.1 Cash Payment

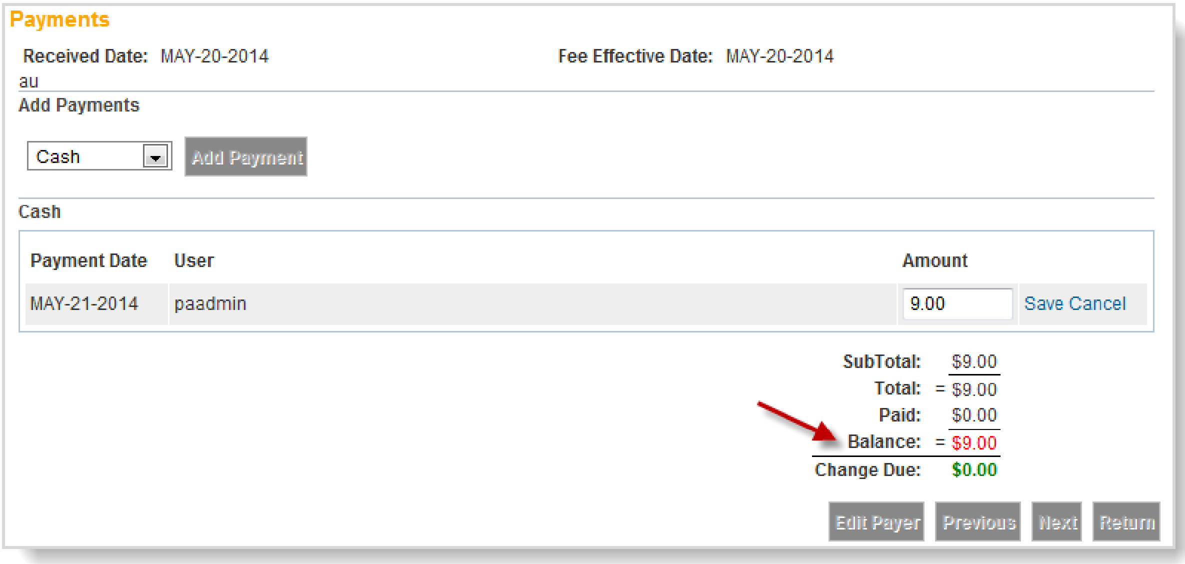
Access the Payments page.

In order to reduce the Balance, payment must be applied. From the *Add Payments* dropdown, select *Cash*.

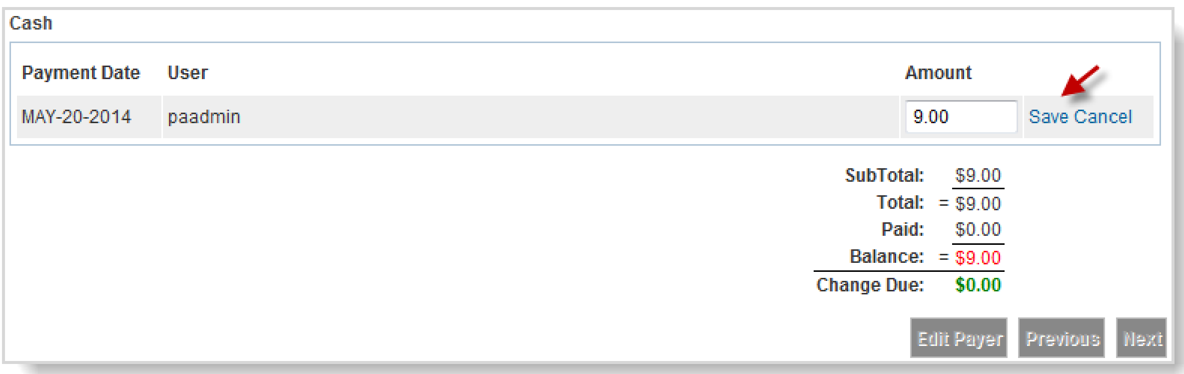
Choose *Cash* from the *Add Payment* dropdown and select the *Add Payment* button



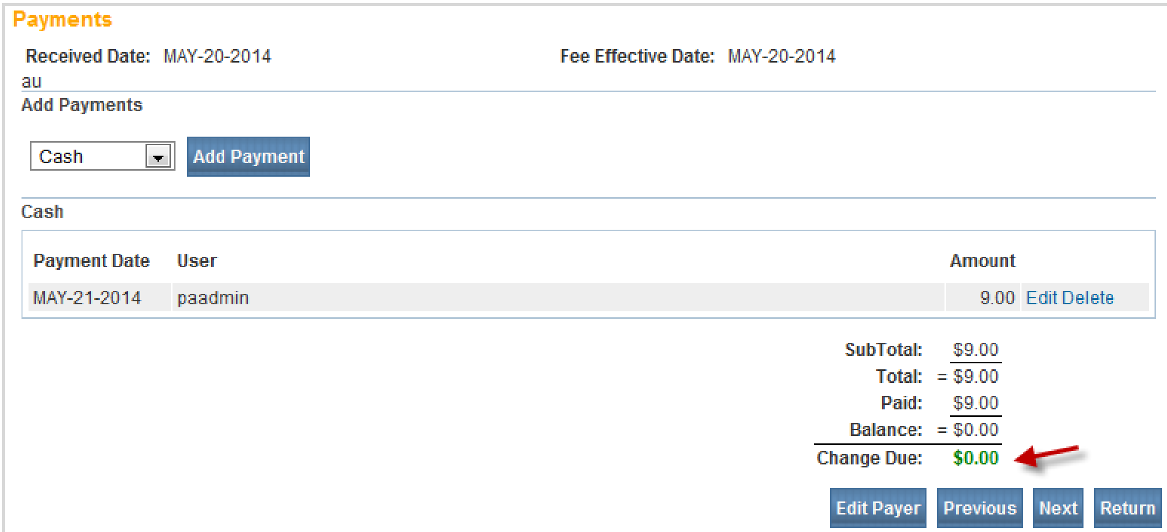
If there is a Balance due it carries over from the Services page.



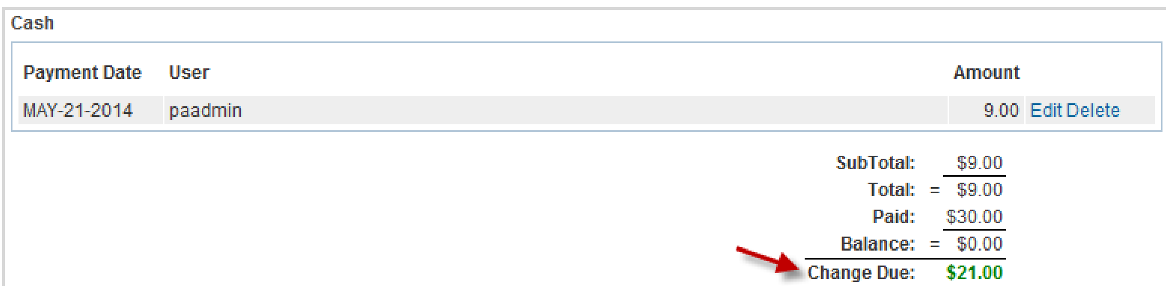
Enter the amount of cash within the *Amount* column. Choose *Save*.



The page refreshes, updating the *Balance*. It has been reduced to $0.00 with no *Change Due*.

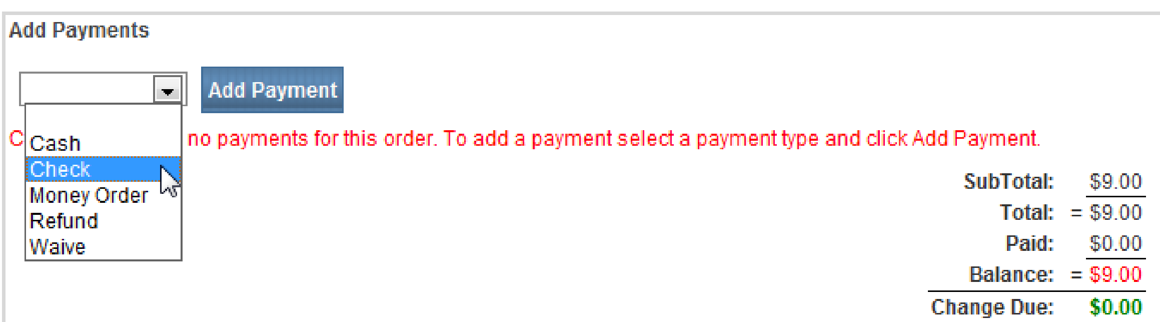


If there had been an overpayment, as would be the case if a customer offered $30 to pay a $9 balance, the amount due back to the customer would be displayed as *Change Due*.

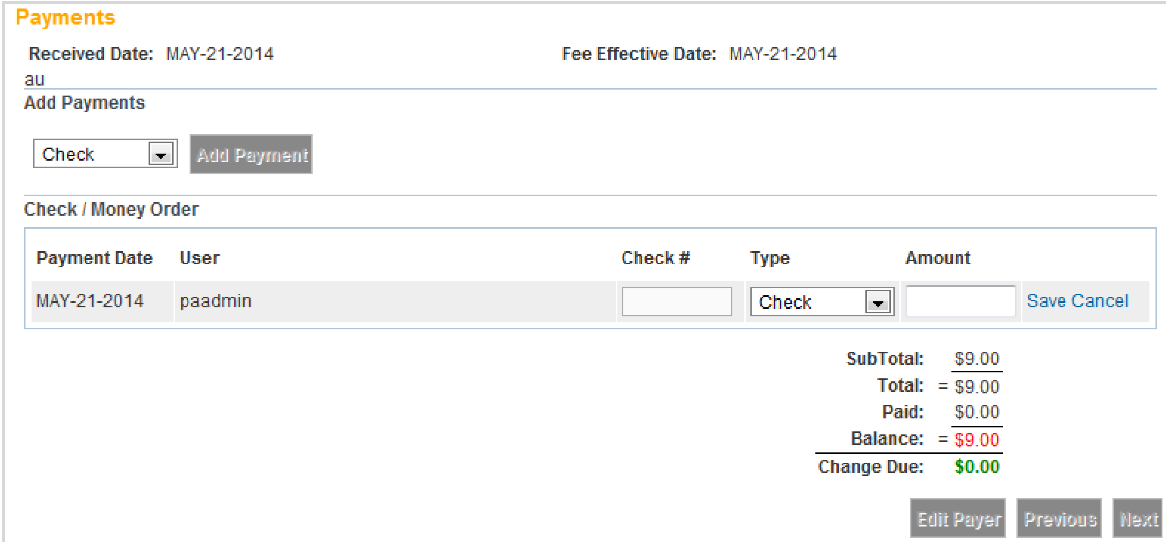


10.5.1.2 Check/Money Order Payment

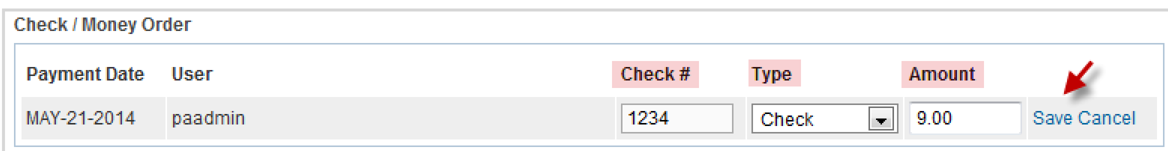
On the Payments page, select *Check* from the *Add Payments* dropdown and click the *Add Payment* button.



A *Check / Money Order* section displays.



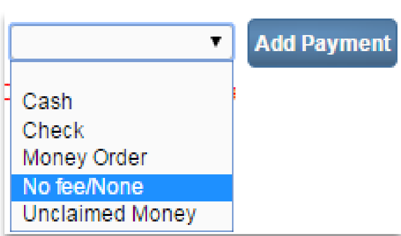
Enter the check number in the *Check #* field and the *Amount*. The *Type* dropdown automatically displays the payment type selected from the *Add Payments* dropdown, but this can be altered if needed. Select the *Save* link in the far right column to save this payment.



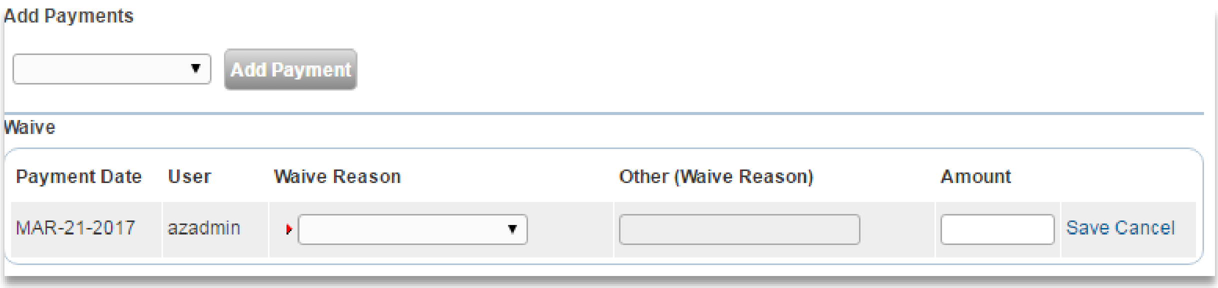
10.5.1.3 No fee/None

DAVE™ provides the ability to waive payments for an order when circumstances provide a certified copy at no charge.

Select No fee/None option from the Add Payments dropdown, and click the Add Payment button.

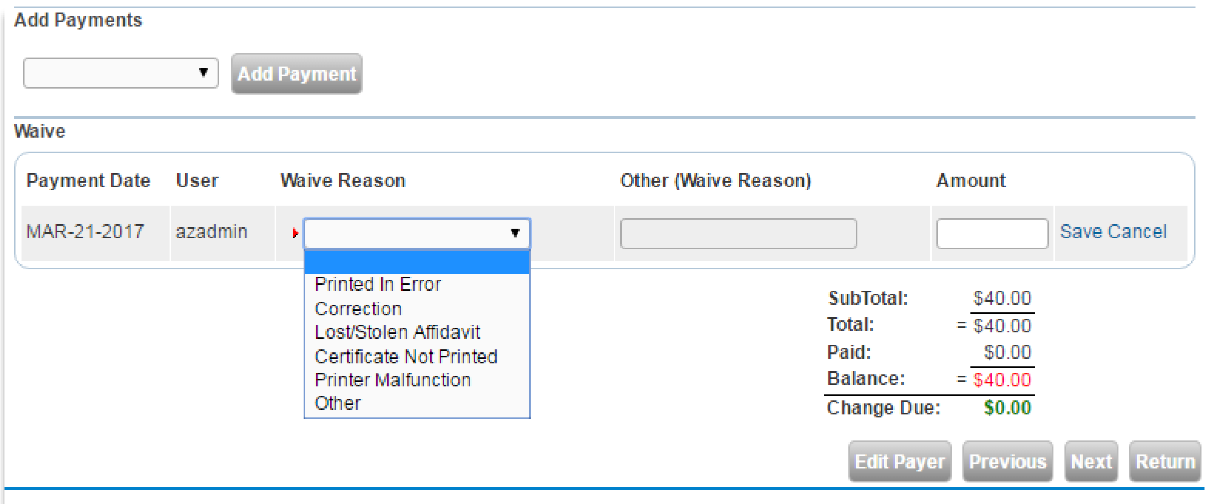


The Waive section is displays.



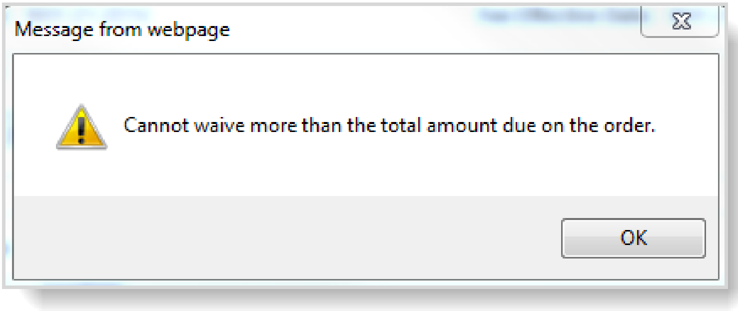
To waive a payment, select a *Waive Reason* from the dropdown. This is a required field.

If the selection from the dropdown is *Other*, then a reason for waiving a portion of or all of a fee must be entered into the *Other (Waive Reason)* field.



After entering the amount of the fee to be waived within the Amount field, select the Save link. The *Waive* amount is calculated in the *Balance* due.

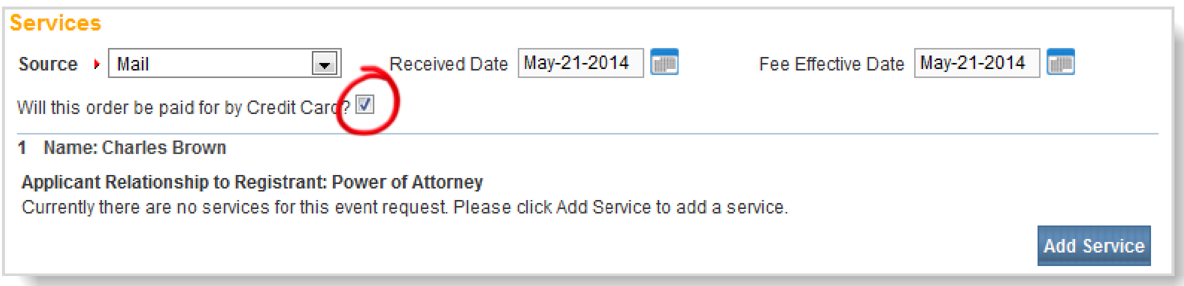
Upon selection of the *Save* link, if the payment type is Waive and the payment amount plus any other existing payment types of waive or refund exceeds the amount due, then the following message will be displayed: *Cannot waive more than the total amount due on the order*.



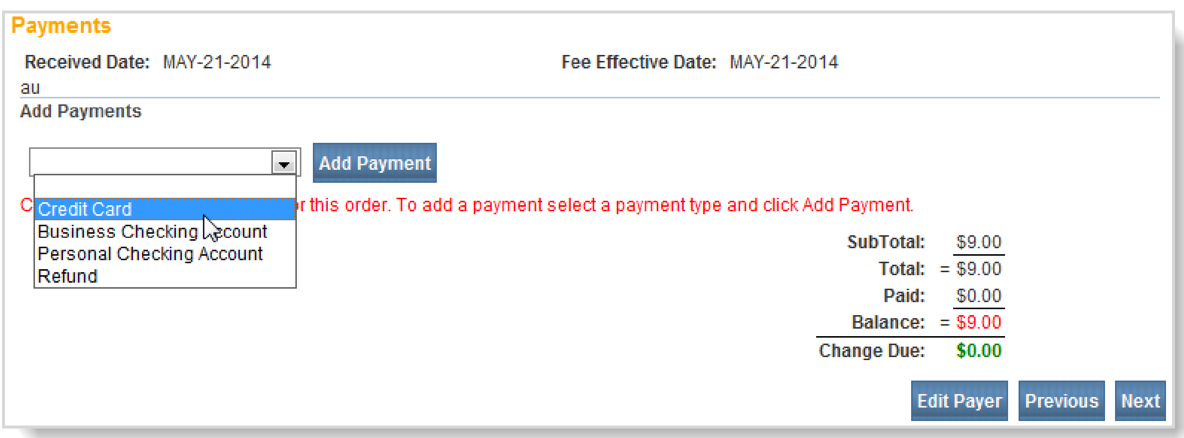
10.5.1.4 Credit Card

All major credit cards can be processed in the DAVE™ application.

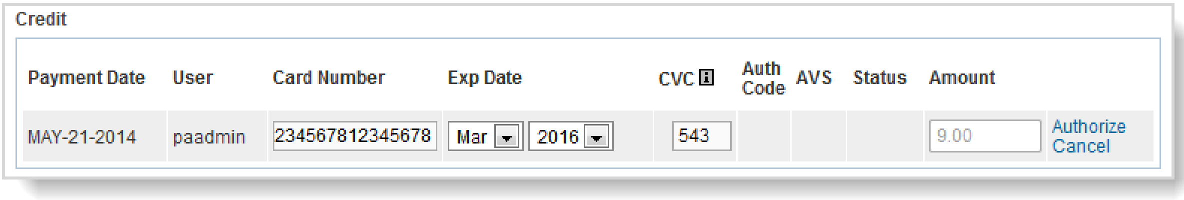
If the applicant wishes to pay for the service(s) via credit card, the *Will this order be paid for by Credit Card?* checkbox on the Services page must be checked. This adds the *Credit Card* value to the *Add Payments* dropdown.



Select *Credit Card* from the *Add Payment* dropdown and choose the *Add Payment* button.



When the Credit section expands, continue with the order by entering the applicant's credit card number, (manually or by swiping through a card reader), within the *Card Number* field.



Enter the credit card expiration date within the *Exp Date* field by selecting the month from the first dropdown and the year from the second dropdown. Enter the security code found on the back of the credit card in the *CVC* field.

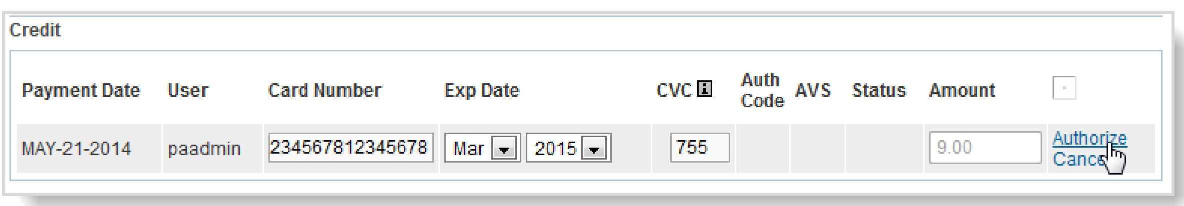
If card information is inputted using a card reader this information will autocomplete.

CVC code: DAVE™ requests the card validation code be entered for credit card transactions. These validation codes combat counterfeit fraud through the use of special numbers that are encoded on the magnetic strip of credit and debit cards. The VISA Card Verification Value (CVV) and the MasterCard and Discover credit cards' Card Validation Code (CVC) are found on the back of the card. The American Express unique card code (CID), is found on the front of the card above the credit card number.

The transaction will not be authorized if the code is left blank or if it does not match the code maintained by the card processor.

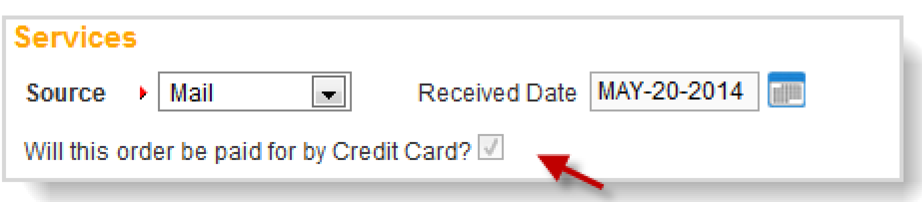
Hover over the information icon for help in locating and entering the CVC code information:

Upon entering the CVC code and monetary amount, select **Authorize** or **Cancel** to confirm entries. Both links are available for selection if the transaction status has not yet been "approved" or "voided." When the *Authorize* link is selected, statuses of "Approved" or "Declined" determine the next system-generated action that occurs.



Approved

If the credit card order receives an *Approved* status from the credit card processor, the *Will this order be paid for by Credit Card?* checkbox on the Services page is disabled.



The Credit Card checkbox is disabled because a credit card order cannot be combined with any other payment type. This locks down the functionality.

Once a credit card has been approved for an order, no other additional payments can be made on that order. The user is required to route back through the Order Processing pages and enter a new order if additional payments are needed.

Multiple services CAN be included in the same order using a credit card as payment. However, once the credit card is approved, DAVE™ prevents adding additional services (or payments) on the order.

If approved, a *Void* link will appear in place of the Authorize and Cancel links. Upon selection of the *Void* link for a credit card transaction, the *Will this order be paid for by Credit Card?* checkbox is re-enabled. The user will be required to uncheck the checkbox to select another method of payment.

Credit

Payment Date	User	Card Number	Exp Date	CVC	Auth Code	AVS	Status	Amount	
MAY-21-2014	paadmin		MAR/2015		TestOK		Approved	9.00	Void

Declined
If the credit card authorization status is *Declined* the checkbox will be re-enabled, for further re-selection/use. The user will be required to uncheck the checkbox to select another method of payment.

DAVE™ provides the ability to enter new credit card payment information if a credit card is declined. The user can add new credit card payments until one is successfully authorized. The original declined transactions remain visible on the page

Authorization - General

During the credit card authorization, DAVE™ will display popup messages to inform users when a credit card entry is invalid for the *Card Number*, *CVC* code and *Expiration Date*.

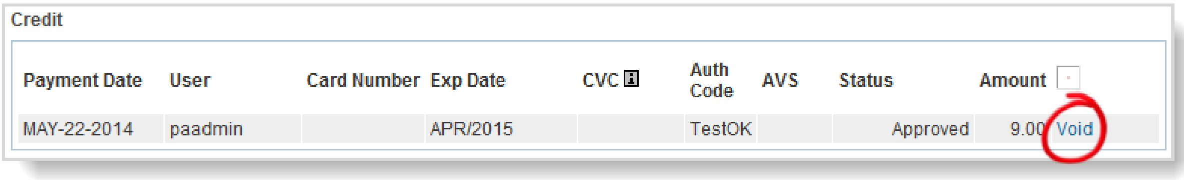
If during a credit card *Authorization* or *Void* an unknown error message is returned, the following popup error message will be displayed: *Error Processing Credit Card Authorization with Credit Card Payment Provider*.

Credit card numbers are **NOT** stored in the DAVE™ database. Upon selection of the *Authorize* or *Void* links, the credit card number will be passed to the VitalChek authorization server and will be cleared from the Payments page.

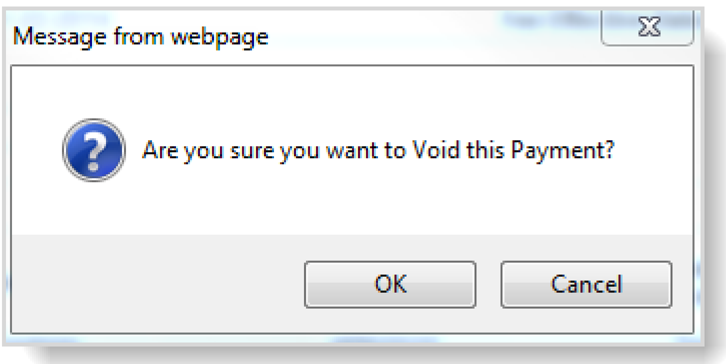
Once a credit card payment has been authorized, DAVE™ prevents a user from adding another credit card payment. If the user selects the payment type of *Credit Card* again, the following error message is displayed, *Invalid transaction. Only one credit card payment is* *allowed per order*. The *Edit* and the *Reverse* link on the Services page is disabled for every service listed.

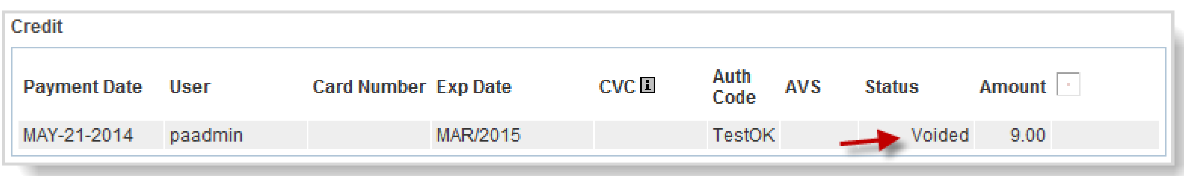
Selection of the Void Link

If a transaction is approved, a *Void* link appears in place of *Authorize* and *Cancel* links.



Selecting the *Void* link prompts a confirmation message. Select the *OK* to send a request to the VitalChek authorization server to void the credit card transaction. The transaction will then be assigned a “Voided” status.





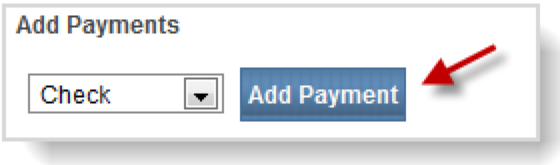
If the credit card payment has already been distributed following the VitalChek Close process, the application will also create a special “Credit Card Void” payment with an amount equal to the amount on the voided credit card payment. The “Credit Card Void” payment cannot be modified. The purpose of this payment is to reverse the previous payment distribution for the credit card payment.

10.5.2 Multiple Payment Types per Order

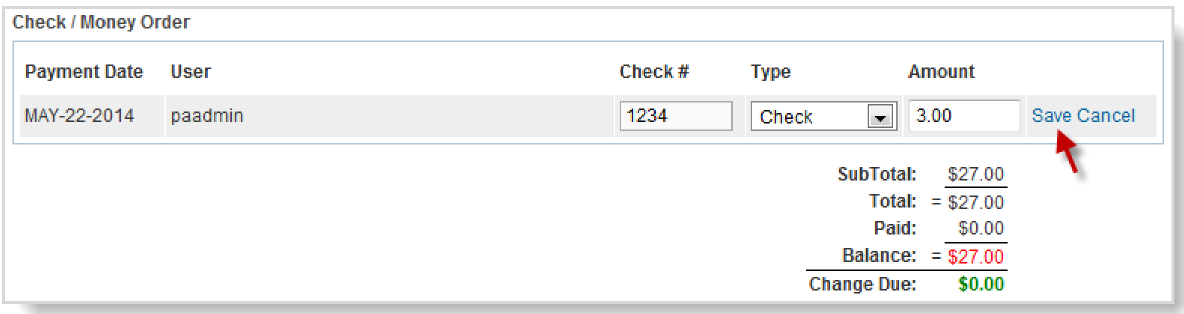
Payment types can be combined in any way, with the exception of credit card payments.

> Credit card payments cannot be combined with any other form of payment on an order. This includes any kind of debit or check card. A debit card would be run as credit, and handled like all other credit card payments.

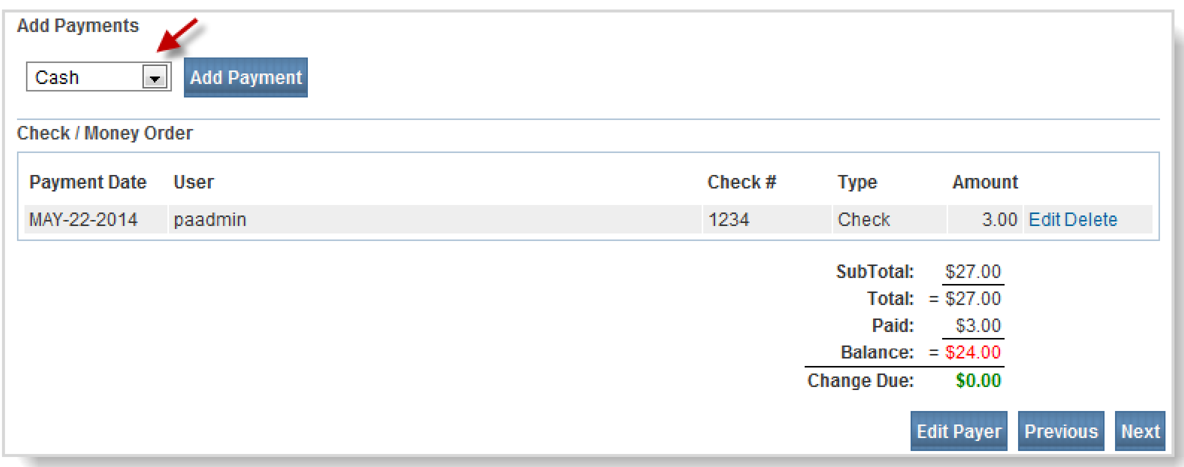
To enter and collect multiple payments on an order, select *Check* from the *Add Payments* dropdown, then select the *Add Payment* button.



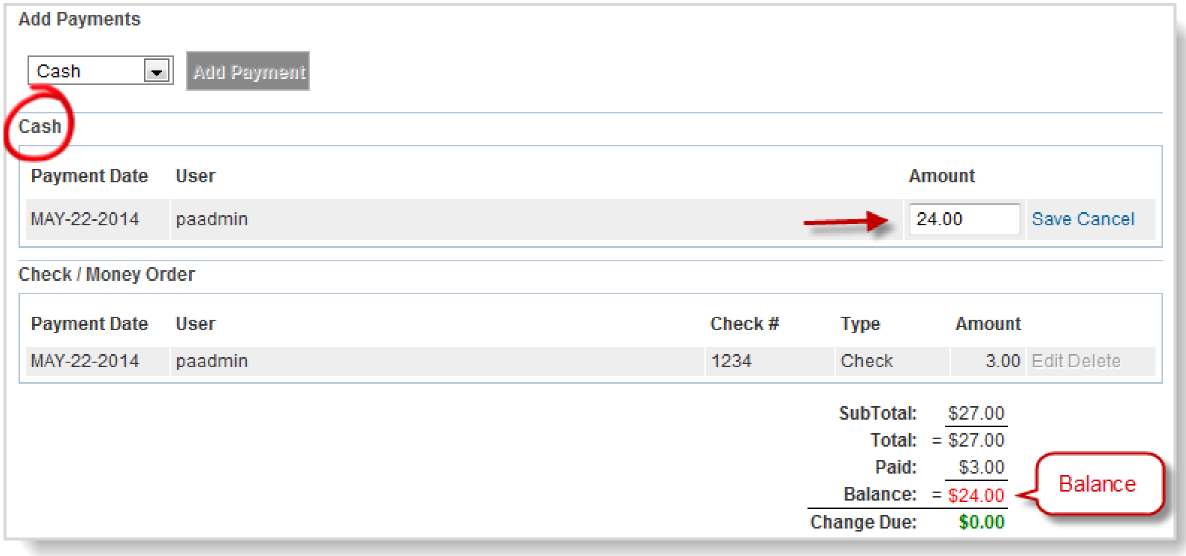
The Check/Money Order section displays. In the *Check #* field enter the number found in the upper right hand corner of the check. Under *Type*, make sure *Check* is selected. In the *Amount* field enter the amount of the check presented. In most cases this will be for the full amount of the *Balance* due. In this example, a split-payment will be used. Enter $3.00 in the *Amount* box and select the *Save* link.



With the partial payment saved, this time select *Cash* from the *Add Payment* dropdown and select the *Add Payment* button again.

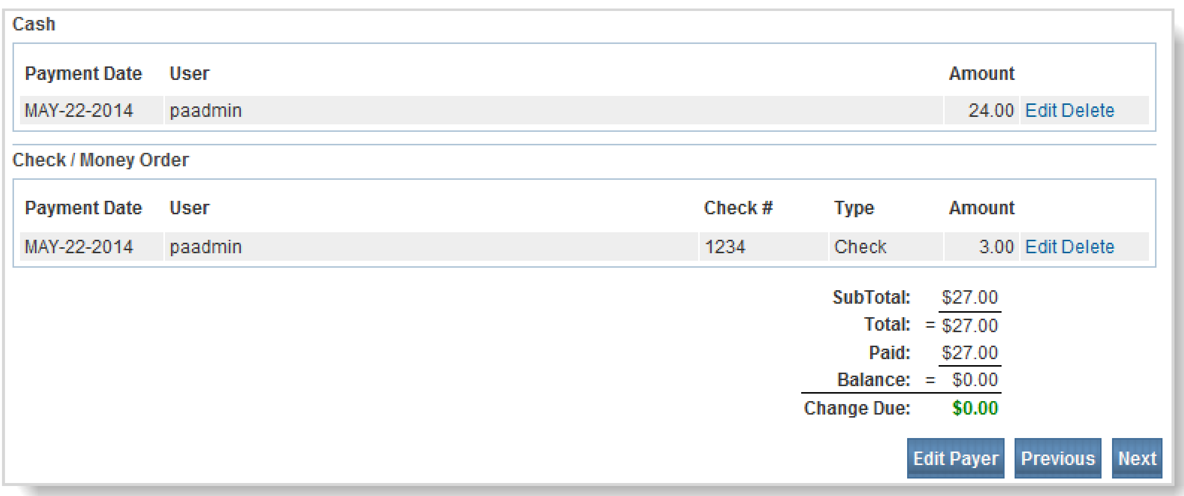


The page refreshes and a new payment section, Cash, is displayed. The *Balance* due at the bottom of the page is updated to reflect the previous payment. In the *Amount* field, enter an amount and select the *Save* link.



The page refreshes again, showing both payments and updating the *Balance*. The *Change Due* line is $0.00. 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.

The *Balance* has been reduced to $0 with no change due. The navigation buttons at the bottom of the page are now enabled.

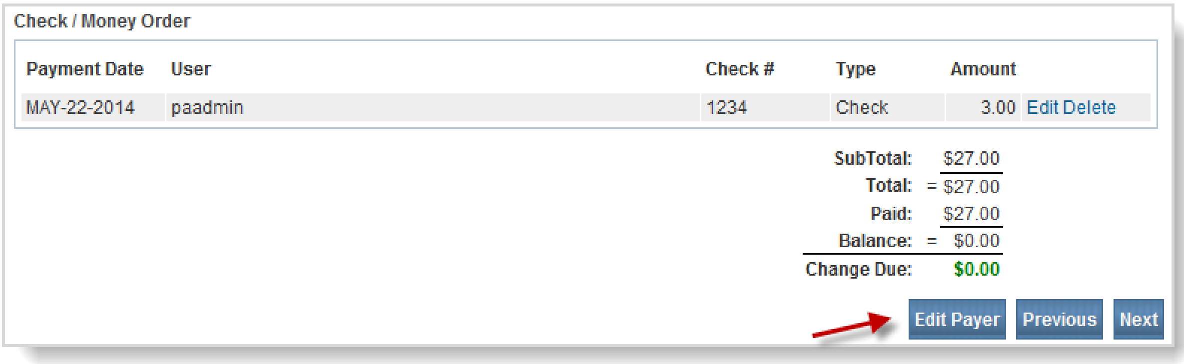


Select *Next* to proceed to the Summary page and continue with order entry.

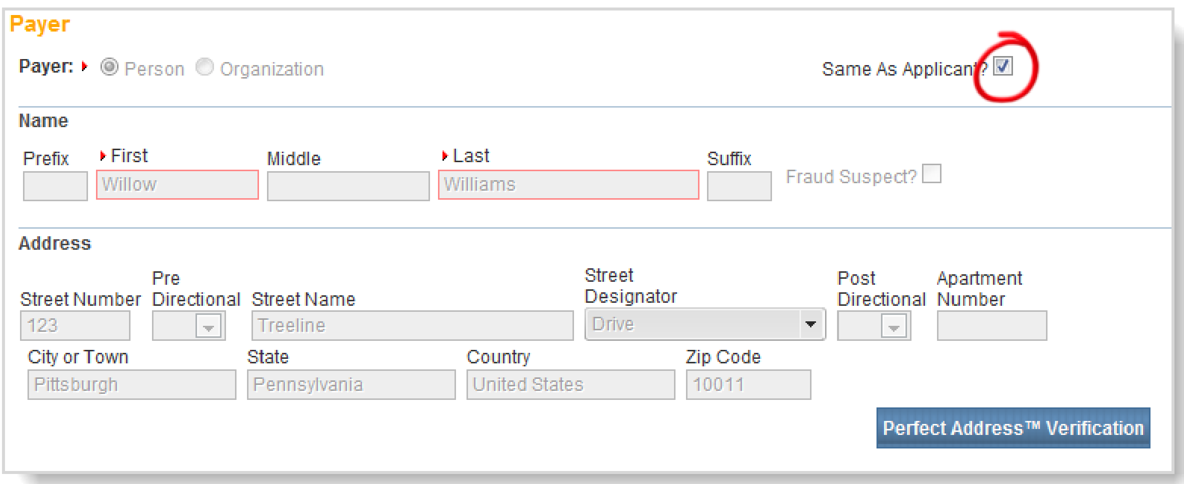
Balance must be equal to $0 before a service/certificate can be issued. Order status will remain invalid if the *Balance* due is greater than $0.

10.5.3 Edit Payer

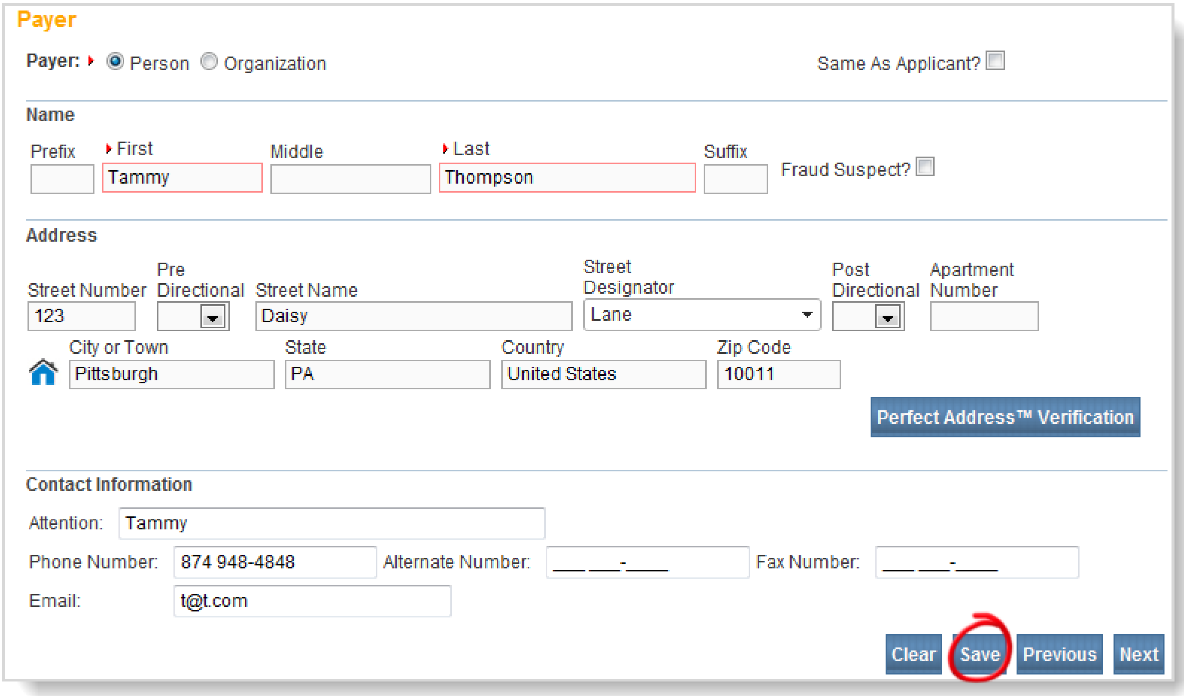
The payer and applicant are not always the same entity. An applicant may be requesting a certified copy of his or her death certificate, but a family member is paying for the order. If the payer and applicant are not the same person or entity, select the *Edit Payer* button. This allows the user to change the payer without changing the applicant.



Selecting the *Edit Payer* button launches the Payer page. The default setting on this page sets *Applicant* and *Payer* as the same person. De-select the *Same As Applicant* checkbox. This clears the fields to allow new payer information.



Complete this page for the *Payer* and select *Save*.



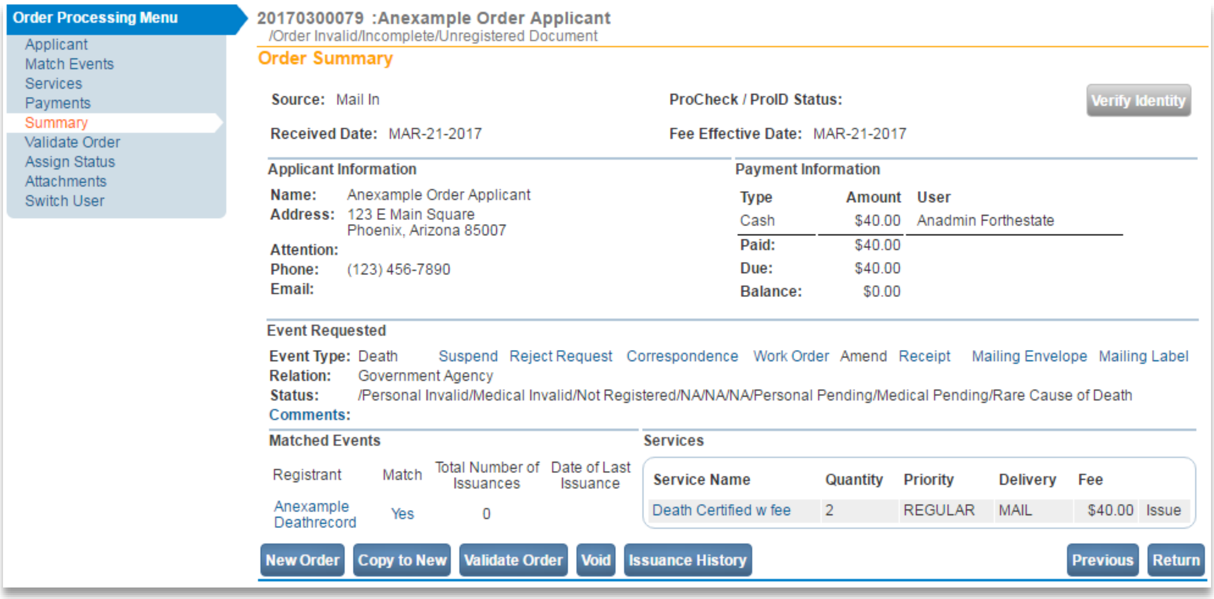
Once the *Payments* page is complete, choose a navigation button at the bottom of the page:

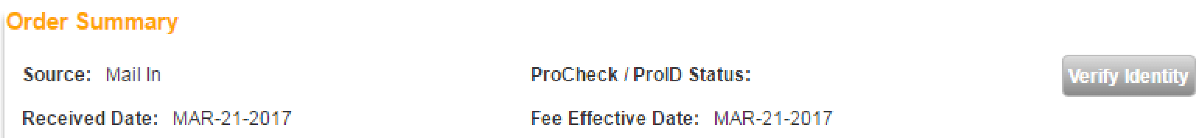
Most often selection of the *Next* button will be used to save what has been entered and proceed to the next page.

Other options include selection of: the *Clear* button to clear all entries, the *Save* button to save changes without leaving the page.

10.6 Order Summary

On the Order Summary page, the user can examine the results of the order, place comments on the order if necessary, validate the order, and perform several other order-related functions. Begin by reviewing all information previously entered.

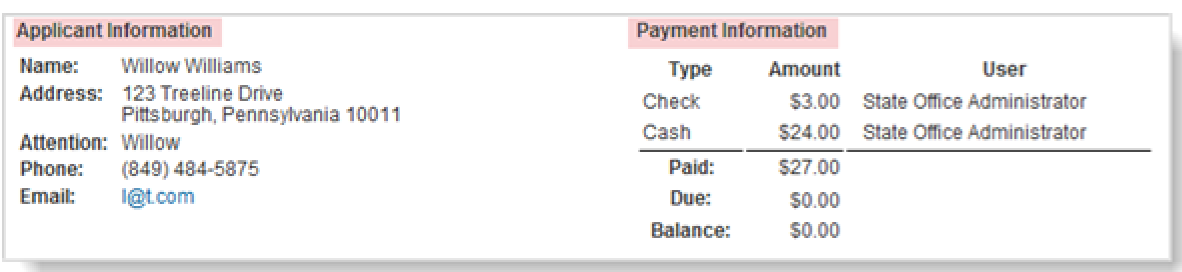




The top-most section of the *Order Summary* page displays the Order Source, Received Date, and Fee Effective Date.

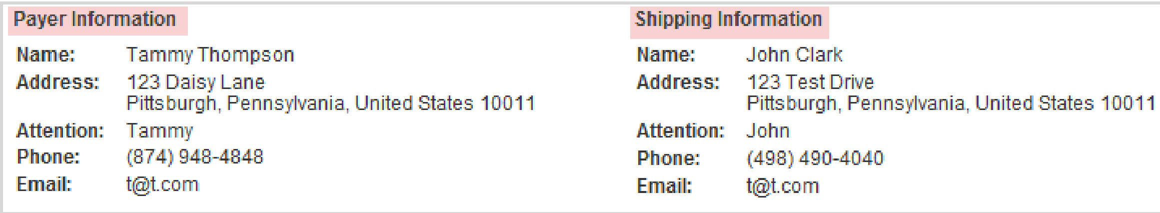
The ProChek/ProID Status is only displayed for those customers who utilize VitalChek's identity verification services and is not currently applicable in Arizona.

The Applicant Information section is displays the name and contact information of the applicant. The Payment Information section contains the amount that was due for the order, the amount paid by the applicant, and the balance. For each payment entered, the Payment Information section contains the payment type, amount, and user name. If any of the fees were waived, the waive reason is displayed below the totals.



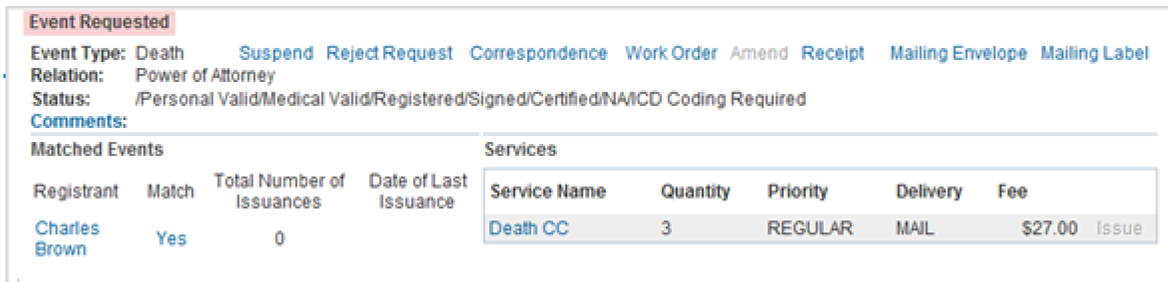
If the Payer page was completed, the information will be displayed within the Payer Information section. The Shipping Information section will be displayed if *the Shipping Information Same as Applicant?* checkbox on the Applicant page was de-selected and the Shipping Information was completed.

These sections won't display if there was not a separate payer entered on the order or if the Shipping Information is the same as the applicant's address.



Payer Information		Shipping Information	
Name:	Tammy Thompson	**Name:**	John Clark
Address:	123 Daisy Lane Pittsburgh, Pennsylvania, United States 10011	**Address:**	123 Test Drive Pittsburgh, Pennsylvania, United States 10011
Attention:	Tammy	**Attention:**	John
Phone:	(874) 948-4848	**Phone:**	(498) 490-4040
Email:	t@t.com	**Email:**	t@t.com

The Event Requested section allows the user to perform several operations related to the order. At the top of the Event Requested section is the *Event Type* and the *Relation* of the applicant. The user has the ability to add comments to an order by selecting the *Comments* link.



Event Requested

Event Type: Death Suspend Reject Request Correspondence Work Order Amend Receipt Mailing Envelope Mailing Label
Relation: Power of Attorney
Status: /Personal Valid/Medical Valid/Registered/Signed/Certified/NA/ICD Coding Required
Comments:

Matched Events

Registrant	Match	Total Number of Issuances	Date of Last Issuance
Charles Brown	Yes	0	

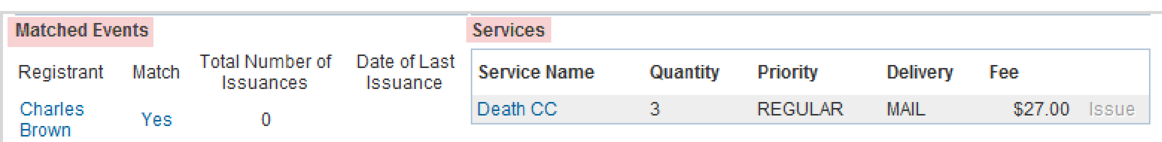
Services

Service Name	Quantity	Priority	Delivery	Fee	
Death CC	3	REGULAR	MAIL	$27.00	Issue

The *Status* of the event requested is also displayed for every event requested that has a match. Statuses are helpful in determining whether the case may be issued.

For example, if the case has an "Unregistered" status or a "Hold" the status, the case cannot be issued and the *Issue* link is disabled.

The *Matched Events* section contains the *Registrant* column heading. If a case was matched to the order, the Registrant column displays the name of the registrant requested by the applicant.



Matched Events

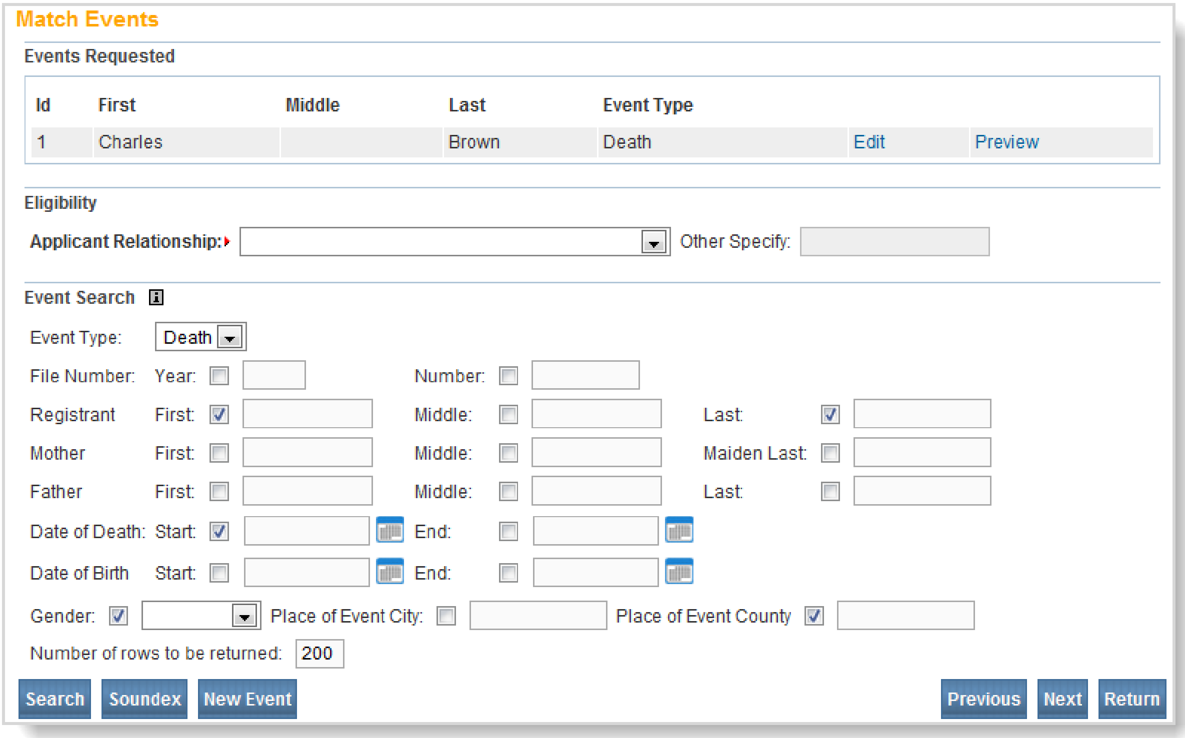
Registrant	Match	Total Number of Issuances	Date of Last Issuance
Charles Brown	Yes	0	

Services

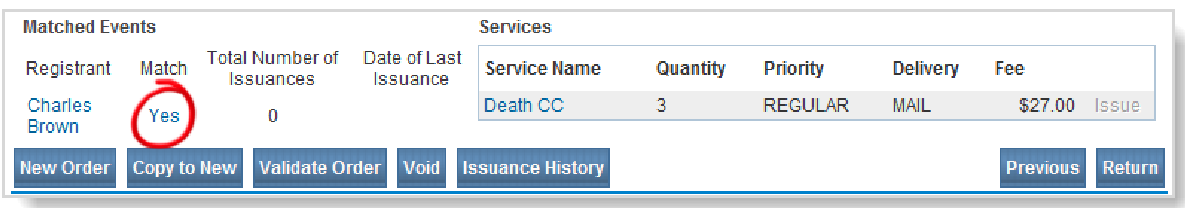
Service Name	Quantity	Priority	Delivery	Fee	
Death CC	3	REGULAR	MAIL	$27.00	Issue

If no matches are found, "No Matched Events Found" is displayed in the *Registrant* column. If Legacy Record was selected, "Legacy" record is displayed.

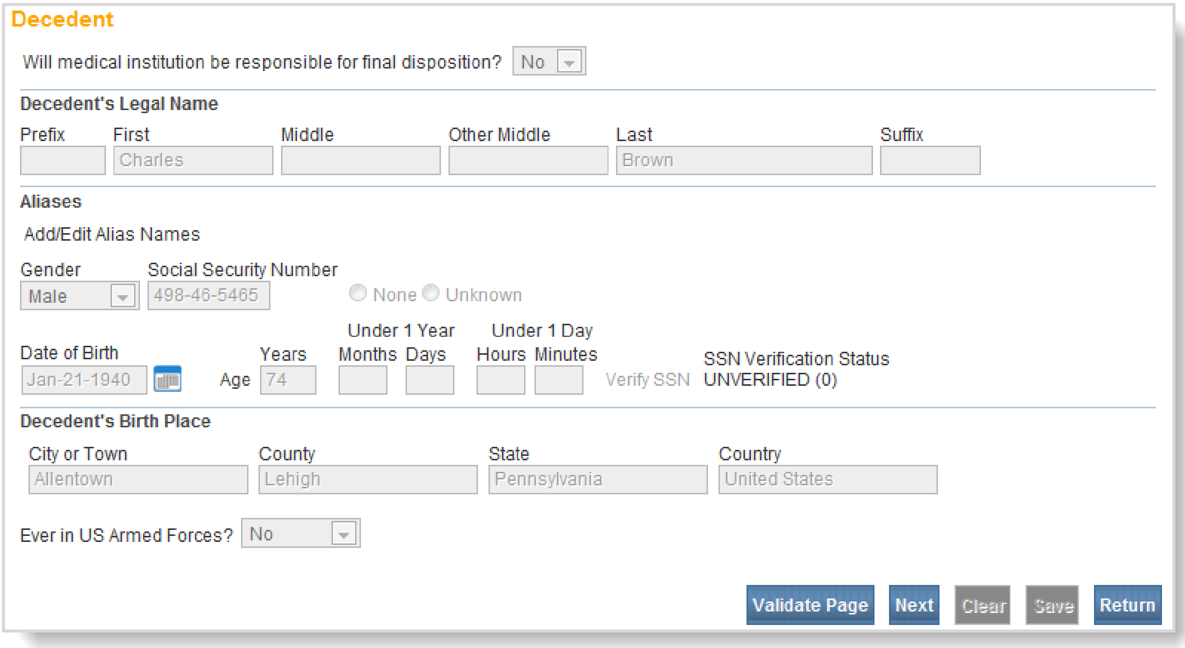
When the *Registrant* link is selected, the Match Events page is displayed. Click the *Return* button to return to the Order Summary page.



Within the Match column, if a case was matched to the order and the user has the proper security, then a *Yes* link is displayed.



If the event requested is a Death, then selecting the enabled *Yes* link take the user to the Decedent page for the *Matched Event*. Select *Return* for the *Decedent* page to go back to the *Order Summary* page.

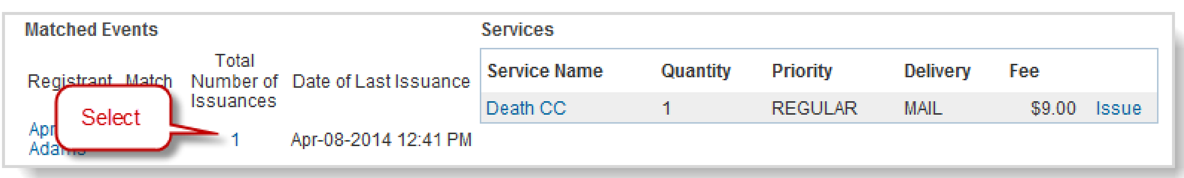


If the event requested is a *Fetal Death*, the user will be taken to the *Fetus* page instead.

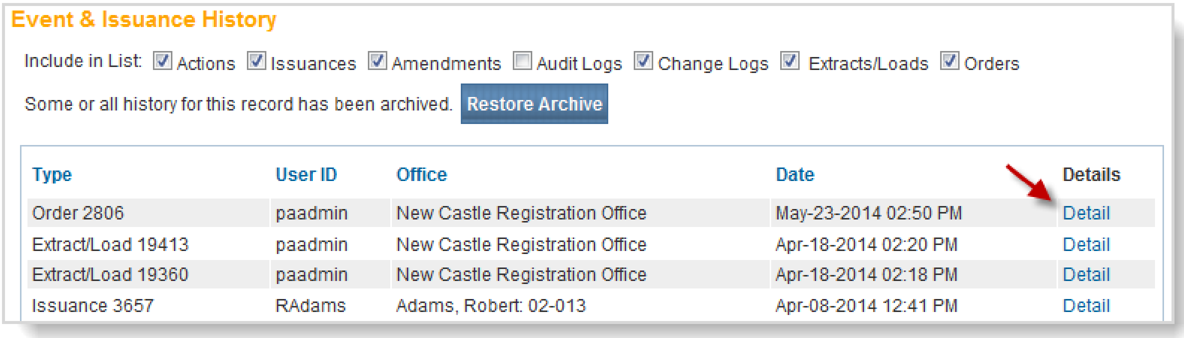
This feature allows the Customer Service Representative to review the registration requested to determine if any business rules or procedures not covered in the order processing rules prevent the case from being issued. If the user does not have access to the case or to registration pages, the *Yes* link will not appear as an active link.

The *Total Number of Issuances* and the *Date of Last Issuance* columns display the issuance history of the matched event.

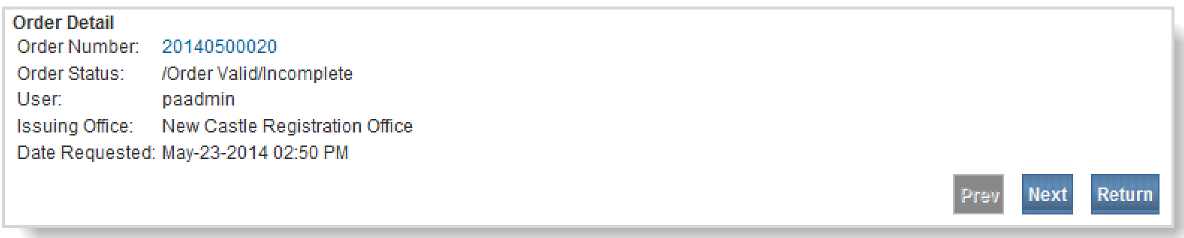
To display the Event and Issuance History page for the matched event, select the *Total Number of Issuances* link.



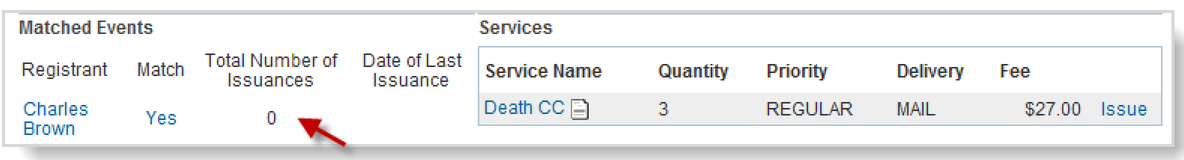
The Event & Issuance History page displays. Select the Detail link next to the Order to view order details.



The order detail displays.

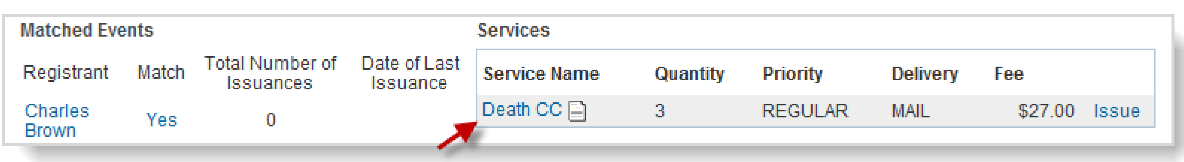


If no previous issuances exist for the matched record, a zero will be displayed as the *Total Number of Issuances*.

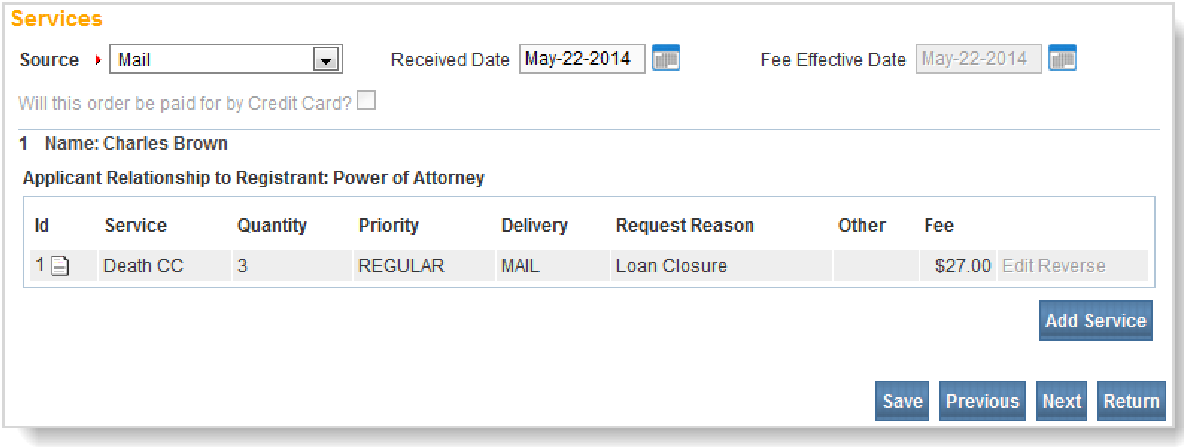


Date of Last Issuance and *Total Number of Issuances* are based on issuances with a complete status. An issuance with a void or incomplete status is excluded.

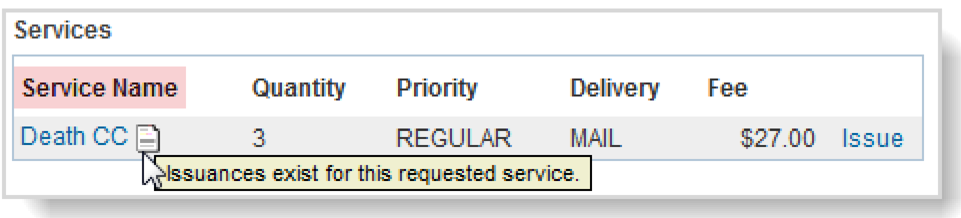
Within the Services section, an active link for each service requested is displayed in the *Service Name* column.



When the Service Name link is selected, the Services page is displayed. Select *Return* to go back to the Order.



If one or more copies of a service have been printed, an icon is displayed next to the *Service Name* link. Hover the mouse cursor over the icon and the application displays a hint dialog with the following text: “Issuances exist for this requested service.”



The *Quantity*, *Priority*, *Delivery*, and *Fee* columns display the information was entered on the Services page.

The last column within the Services section will conditionally provide an *Issue* link. Conditions for display of the Issue link include:

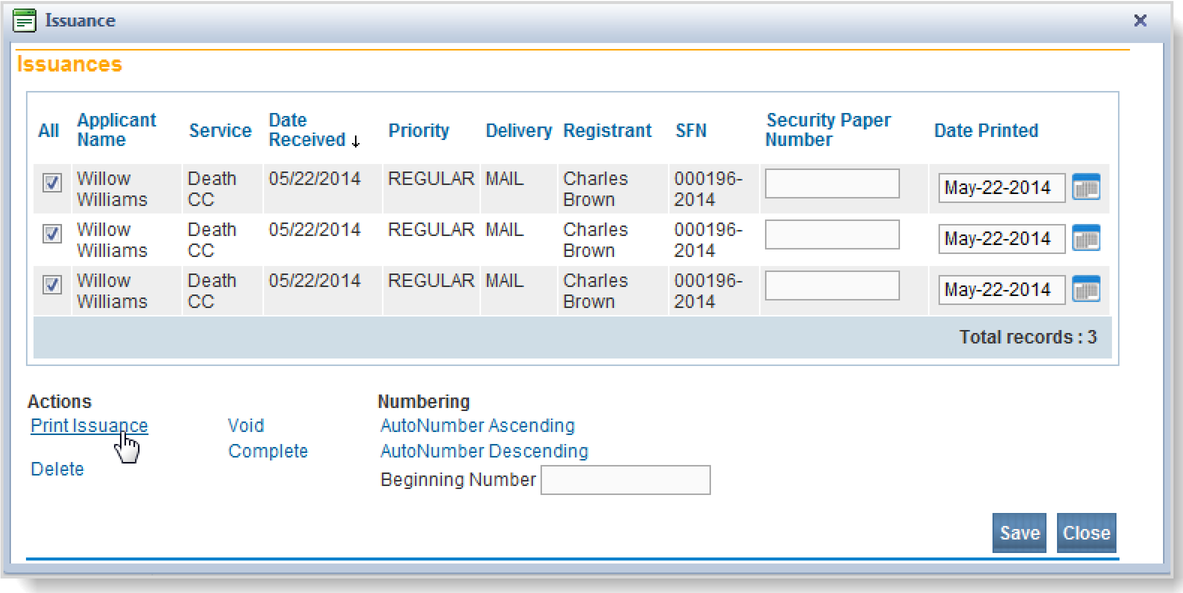
- If the order has passed all edit rules.
- If the issuances have not been printed and set to complete.

If all issuances are printed or deleted from the queue, the *Issue* links for the services are disabled.

10.6.1 Issue a Record

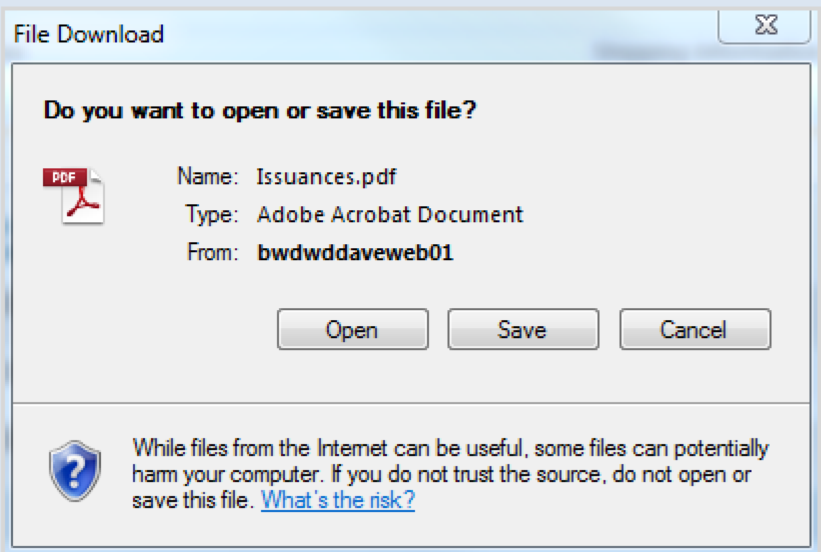
Upon selection of the *Issue* link, the Issuance Queue page displays and allows users to print the certified copies of records based on the service requested.

To issue/print a certificate, place a checkmark next to the desired record. Select *Print Issuance*.

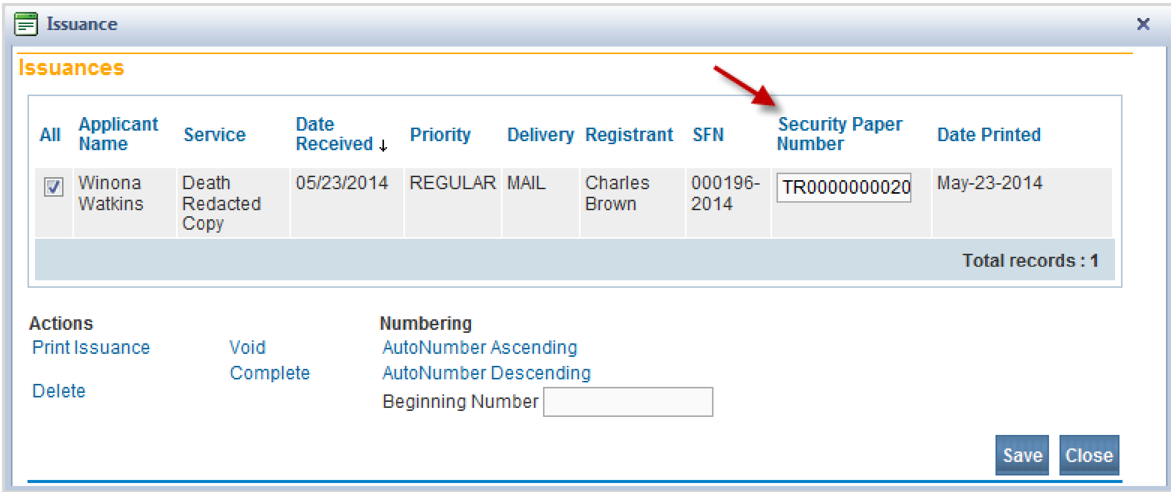


Select the *Print Issuance* link to launch and display the PDF of the Issuance.

Dependent upon which browser you use, you may need to select the Open link for the PDF to display.

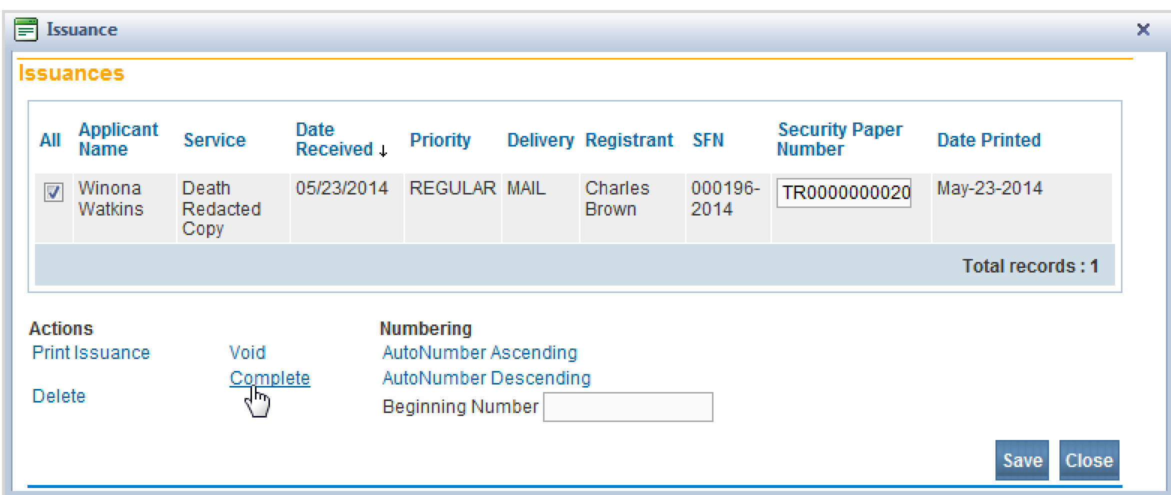


Once the record is printed, enter the security paper number in the *Security Paper Number* entry box and select the *Save* button. This saves the *Security Paper Number* and auto-fills the *Date Printed* box with the current date.



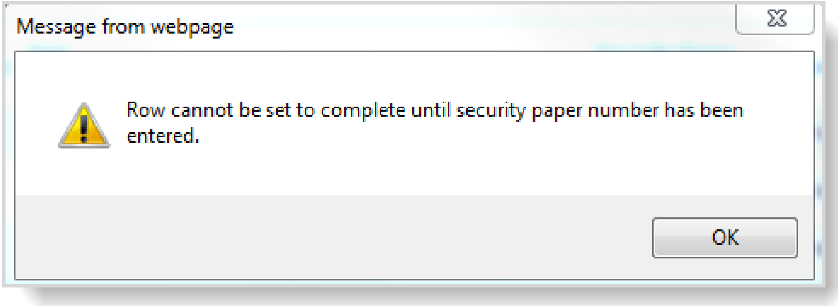
The *Security Paper Number* is a pre-preprinted number used to identify and track pieces of security paper. This pre-printed number is unique to the paper type (e.g. wallet, short, long, etc.).

If the service printed properly without paper jams or errors, click the *complete* link. This is the final step in processing an order.



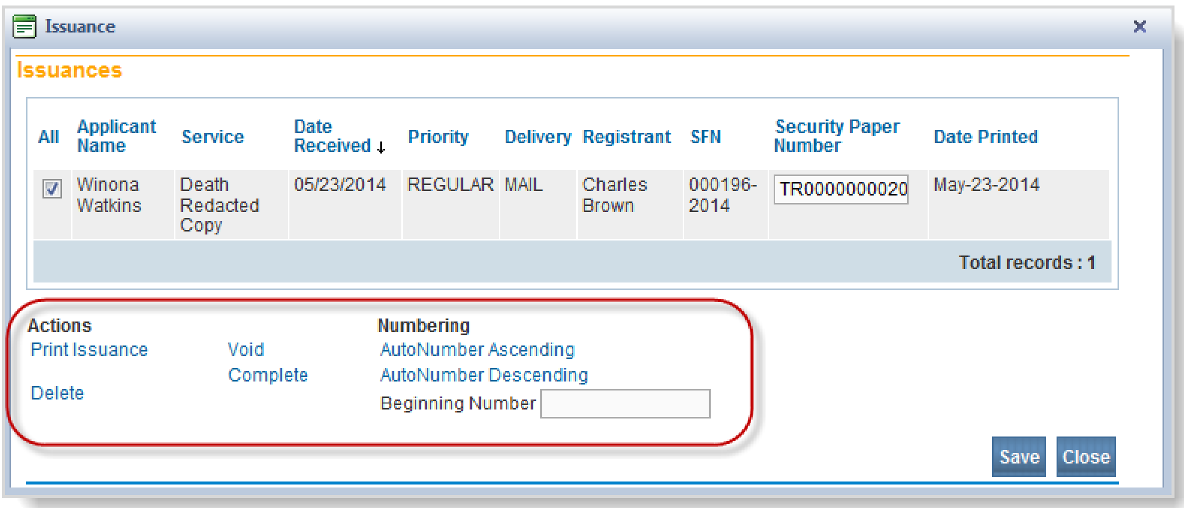
Once an order has been marked complete, the *Print* link on the Order Summary page is disabled.

If the *Security Paper Number* field is left blank, the order cannot be completed and the user receives the following error message:



Other links available for selection on the Issuance page:

Delete - Select the *Delete* link to delete or remove issuances from the issuance queue. This may be necessary if a customer reduces the number of copies requested or changes the service. Upon selection of the *Delete* link, if all rows are deleted, the actions are disabled.



Void - If a certificate did not print properly, or the paper jammed, etc., and needs to be voided, use the *Void* link to void the selected item's print record and start over. This voids the security paper number and allows a new certified copy to be reprinted.

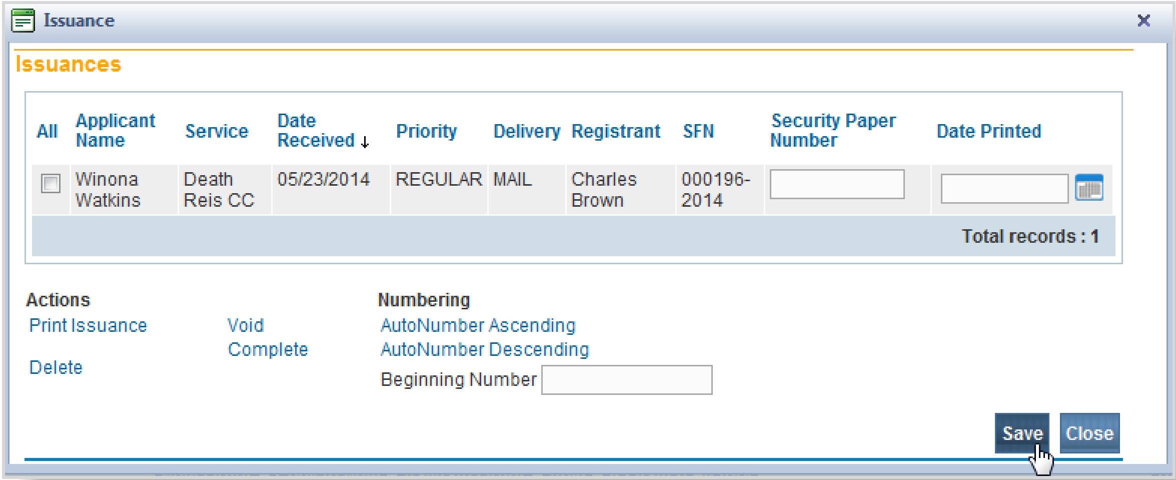
AutoNumber Ascending - The AutoNumber Ascending feature is used to assign security paper numbers to a group of certified copies in sequential ascending order.

AutoNumber Descending - The AutoNumber Descending feature is used to assign security paper numbers to a group of certified copies in sequential descending order.

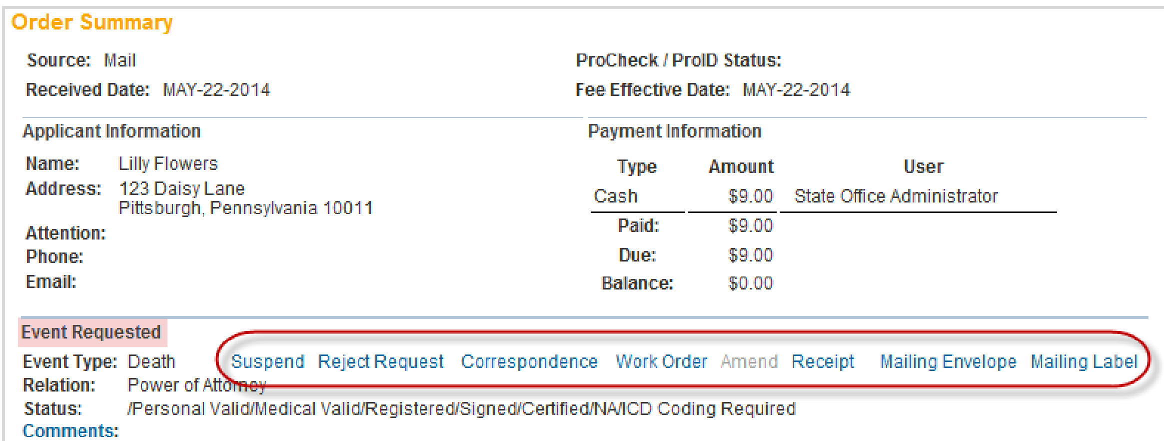
Follow these steps to use the AutoNumber features:

- Place a checkmark in the All column of the records to be updated.
- Enter the starting number in the Beginning Number textbox.
- Select the AutoNumber link to start the numbering process.

Select the *Close* button to close the Issuance page.

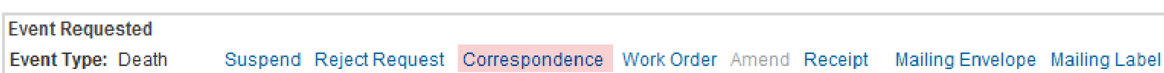


10.6.2 Event Requested Links



10.6.2.1 Correspondence

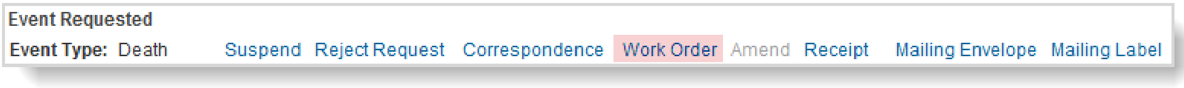
If insufficient or inaccurate data is presented, the DAVE™ *Correspondence* link can be used to automatically complete and prepare correspondence requesting additional information. Upon receipt of additional information, pending orders may be retrieved directly from a work queue.



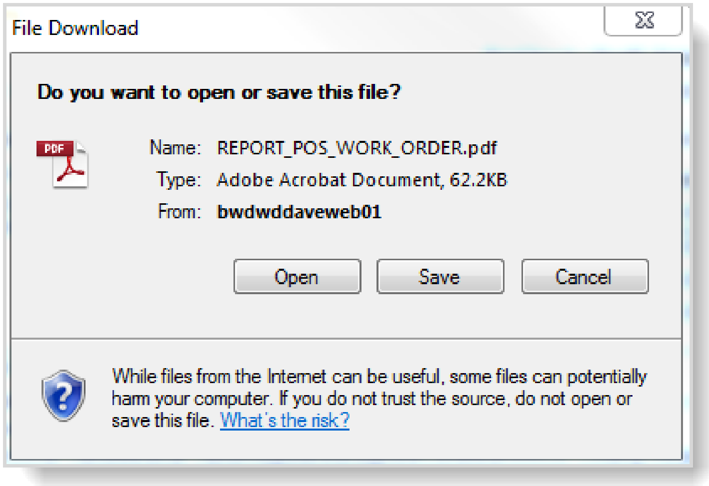
Please see the “Correspondence” section in the DAVE – Table Maintenance guide for more information regarding Correspondence.

10.6.2.2 Work Order

The work order is intended to be used as an aide for conducting manual paper searches for legacy records.



To print a work order, select the *Work Order* link. A File Download dialog box will display:



Select *Open* to open the Work Order for printing.

Work Order example below.

pennsylvania
DEPARTMENT OF HEALTH

POS Work Order

Report Parameters

Pennsylvania
Department of Health
Office of Vital Records and Health Statistics

OFFICE: New Castle Registration Office - PA State Registration Offi
USER: paadmin

Order Number 20140500014
Date Entered May 22, 2014
Applicant Name LILLY FLOWERS
Type DEATH **Status** /Order Valid/Incomplete

Event Date	**SFN**
04/02/2014	000196-2014

Event Comments

Search Details	**Entered**	**Results**
Event Type	Death	
Date of Death: End Date		
Date of Death: Start Date	Apr-02-2014	Apr-02-2014
File Number		000196
File Number Year		2014
Registrant Date of Birth End Date		
Registrant Date of Birth Start Date		Jan-21-1940
Registrant First Name	Charles	Charles
Registrant Middle Name		
Registrant Last Name	Brown	Brown
Mother First Name		Bobbie
Mother Middle Name		
Mother Maiden Last Name		Brawn
Father First Name		Bobby
Father Middle Name		
Father Last Name		Brown
Gender		Male
Place of Event City		Pittsburgh
Place of Event County		Allegheny

Services Requested	**Priority**	**Delivery Type**	**Quantity**
Death CC	REGULAR	MAIL	1

Request Reason Marriage
Applicant Relationship Power of Attorney
Applicant Telephone Number
Event Status /Personal Valid/Medical Valid/Signed/Certified/Registered/ICD Coding Required
Amendment Number 1021, 1022, 1052
Email
Order Comments

Order Number: 20140500014
\# of Copies: 1
Certificate Fee: $9.00
Total Certificate Fees: $9.00
VCN Fee: $0.00
Carrier Fee: $0.00
Refund: $0.00
Total Fee: $9.00

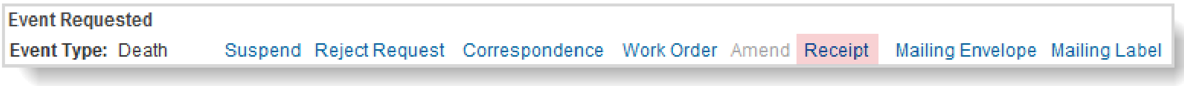
LILLY FLOWERS
123 DAISY LANE
PITTSBURGH, PA 10011

Friday, May 23, 2014 9:18 am

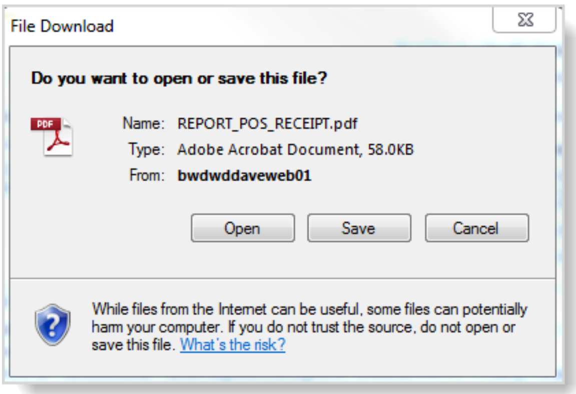
Page 1 of 1

10.6.2.3 Receipt

Sometimes customers require a receipt to demonstrate they have paid for services rendered. It may even be a requirement in certain offices. When the customer requires a receipt, select the *Receipt* link located in the Event Requested section.



Select *Open* in the File Download Dialogue Box to view/print the order receipt



If the applicant is different from the payer, the receipt will print the name of both the applicant and the payer; otherwise just the applicant will be printed.

pennsylvania
DEPARTMENT OF HEALTH

Order Receipt

Pennsylvania
Department of Health
Health & Welfare Building
7th & Forster Streets, Harrisburg, PA 17120

SA

Order Number: 20140500014

Date: 5/23/2014 9:36:50AM

Applicant: Lilly Flowers

Ship To:
Lilly Flowers
123 Daisy Lane
Pittsburgh, PA 10011

Order Number: 20140500014

Date - Time: 5/23/2014 9:36:50AM

Applicant: Lilly Flowers

Payment Type: Cash

Payer: Lilly Flowers
123 Daisy Lane
Pittsburgh, PA 10011

Qty	Service	Name	Delivery	Total Amount
1	Death CC	Charles Brown	MAIL	$ 9.00
			Sub-Total	$ 9.00
			Waived	$ 0.00
			Shipping & Handling	$ 0.00
			Due	$ 9.00
			Paid	$ 9.00
			Refund	$ 0.00
			Balance	$ 0.00

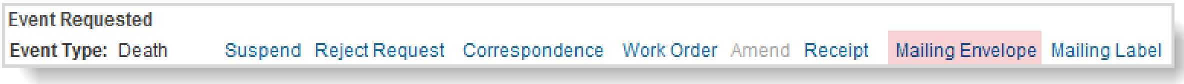
20140500014+

Friday, May 23, 2014 9:36 am

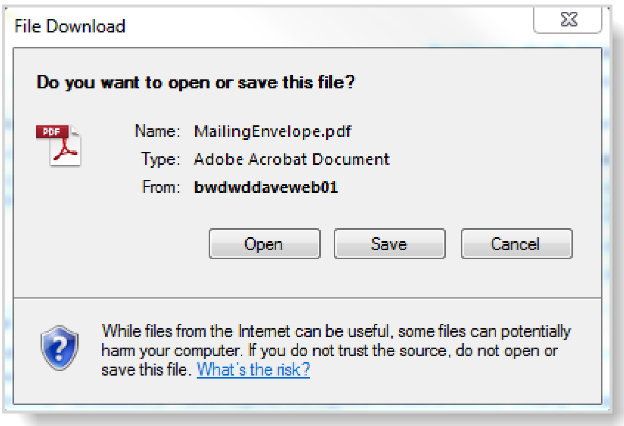
Page 1 of 1

10.6.2.4 Mailing Envelope

DAVE™ provides the ability to print shipping information of the applicant directly onto a Mailing Envelope by selecting the appropriate link on the Order Summary page.



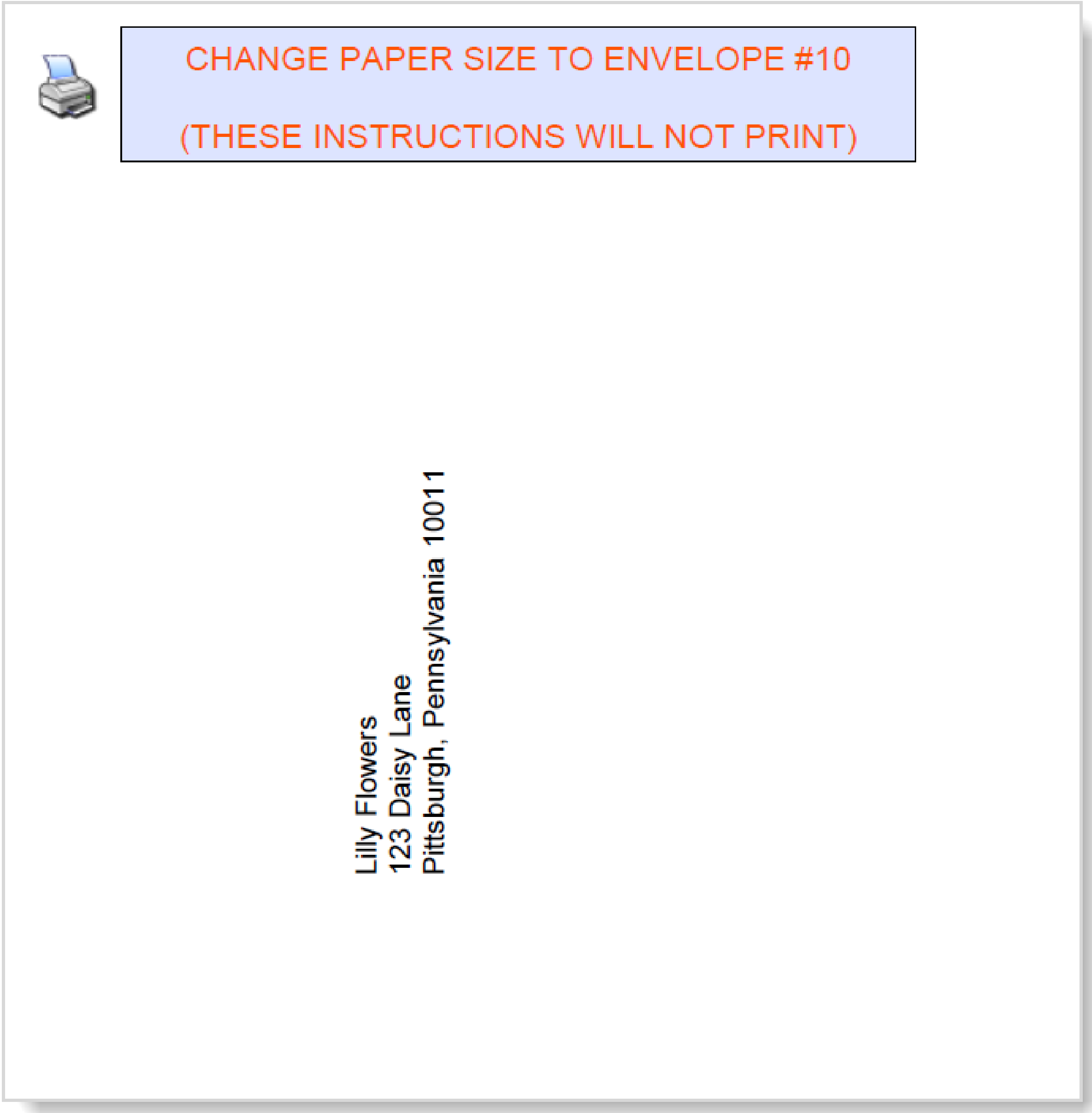
Selection of the *Mailing Envelope* link produces a PDF document displaying the shipping name and address as recorded on the Applicant page of the order.



The Mailing Envelope feature will print a size 10 envelope with the following shipping information included:

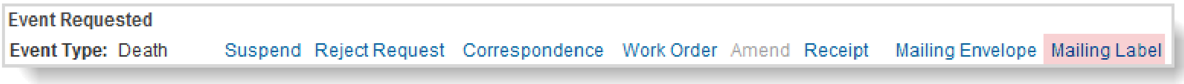
Line 1:	<Shipping First Name>, <Shipping Middle Name>, <Shipping Last Name>, <Shipping Suffix>
Line 2:	<Street Number>, <Pre-Directional>, <Street Name>, <Street Designator>, <Post Directional>, <Apt>
Line 3:	<City>, <State>, <Zip Code>
Line 4:	<Country> (Print only if Country is NOT United States)

Example of mailing envelope:

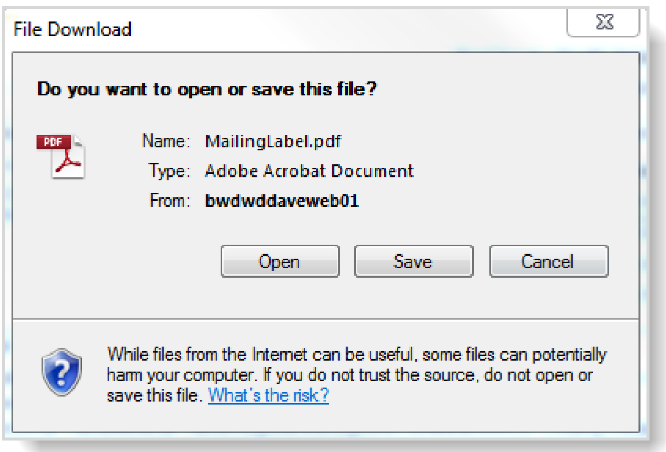


10.6.2.5 Mailing Label

DAVE™ provides the ability to print shipping information of the applicant directly onto a Mailing Label. Select the *Mailing Label* link in the Event Requested section on the Order Summary page.



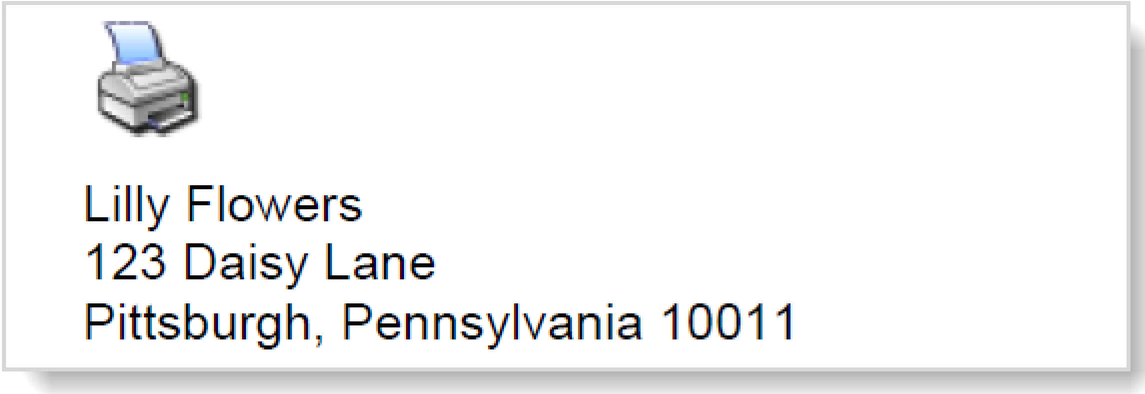
Selecting the Mailing Label link produces a pdf document with the shipping name and address as recorded on the Applicant page of the order. In the File Download dialogue box, select *Open* to open the file for printing, or select Cancel to close without printing.



Below is the shipping information included on the label:

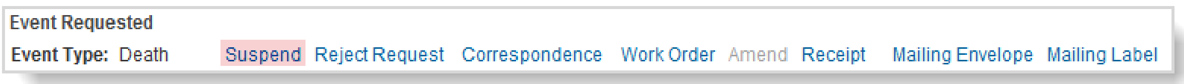
Line 1:	<Shipping First Name>, <Shipping Middle Name>, <Shipping Last Name>, <Shipping Suffix>
Line 2:	<Street Number>, <Pre-Directional>, <Street Name>, <Street Designator>, <Post Directional>, <Apt>
Line 3:	<City>, <State>, <Zip Code>
Line 4:	<Country> (Print only if Country is NOT United States)

The measurements of the label will be 2.625” by 1”. Once the PDF file is open, select the print icon displayed on the PDF file. The icon/picture will not print onto the paper. Example of a Mailing Label:



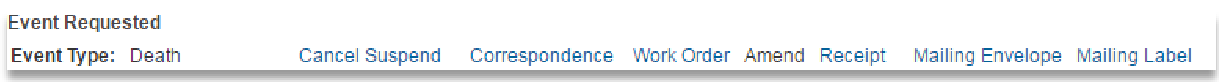
10.6.2.6 Suspend

This feature is used to exclude an order from the cash out until a customer provides proper entitlement documentation.



Selection of the Suspend link displays a message confirming suspension of the event. By selecting OK, the event is suspended and the order will be excluded from the cash out process.

A Cancel Suspend link is now available. Once the proper entitlement documentation is provided the suspend can be cancelled by selecting this link. The order will then be included in the cash out process.



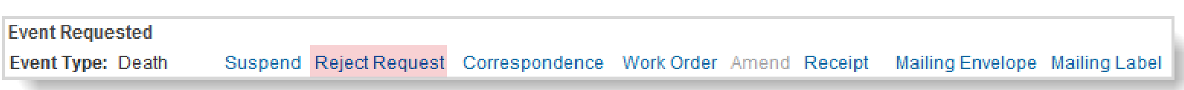
10.6.2.7 Reject Request

Occasionally, a customer is not legally entitled to a copy of the event requested and it is necessary to reject the request. The user will not be allowed to edit the event request information or add new services once the *Reject Request* link has been selected on the Order Summary page.

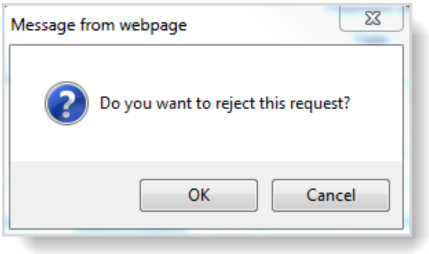
> Rejecting a request cannot be undone. Once rejected, a new order will have to be initiated.

Reject a request by following these steps:

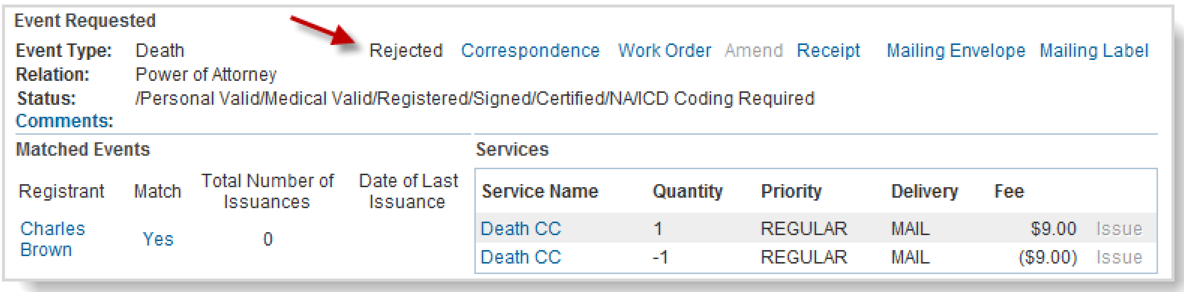
- Locate and select the *Reject Request* link on the Order Summary page.



- Select the *OK* button from the confirmation message that is displayed.



If *OK* is selected, the Order Summary page will refresh and the *Reject Request* link will be replaced with a non-selectable *Rejected* label.

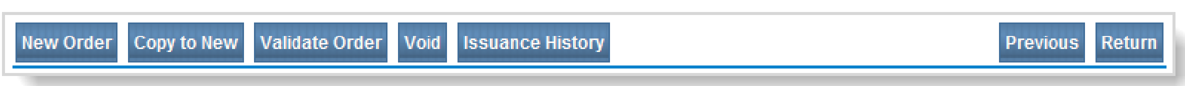


All fields on the Services and Match Events pages associated with the rejected request will be disabled.

If issuances exist, the following error message will be displayed: "Issuances must be deleted before rejecting request."

10.6.3 Order Summary Page buttons

The buttons across the bottom of the Order Summary page can be used to process the order.



New Order: If selected, a blank Applicant page will be displayed

Copy to New: If selected, a new Order will be created copying the Applicant and Match information into the New Order.

Validate Order: If selected, all order processing validation edit rules will be triggered to ensure accurate completion of the order.

Void: If selected, DAVE™ prompts according to whether the order has issuances and it is voided based on user response to the prompts: If issuances exist (i.e. certified copies have been printed), the verification message “All completed issuances will be voided. Do you want to void this order?” is displayed. If issuances do not exist, the user is prompted to confirm the void “Do you want to void this order?”

Issuance History: If selected, the Issuance History page will be displayed; a row will be displayed for each item printed/issued. Example of Issuance History page:

Issuance History — Order Number: 20140500018

Service Name	Security Paper Number	Tracking Number	Date Printed	Shipped Date	Date Completed	Date Voided	User	Issuing Office	Delivery Date	
Death CC	TR0000000010		May-23-2014 01:31 PM		May-23-2014 01:31 PM		State Office Administrator	New Castle Registration Office - PA State Registration Office		Edit
Death CC	TR0000000011		May-23-2014 01:31 PM		May-23-2014 01:31 PM		State Office Administrator	New Castle Registration Office - PA State Registration Office		Edit

The Issuance History button is available based on security privileges.

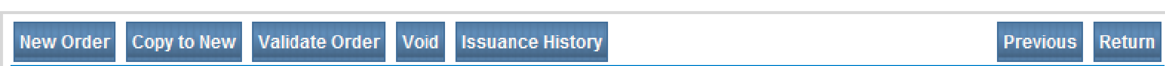
Previous: If selected, returns the user back to the last or previous page.

Return: If selected, returns the user back to the first or original page (search results or work queue only).

10.7 Validate Order

DAVE™ provides the ability to validate the information entered for a customer order. Order processing validation rules may be based at the event request, order, or service level. For example, if a customer requests several different records within one order, in order to verify the customer's legal entitlement, an entitlement rule must be triggered for each event requested.

To validate an order, DAVE™ provides a *Validate Order* link within the Order Processing Menu and a *Validate Order* button on the bottom of the Order Summary page.

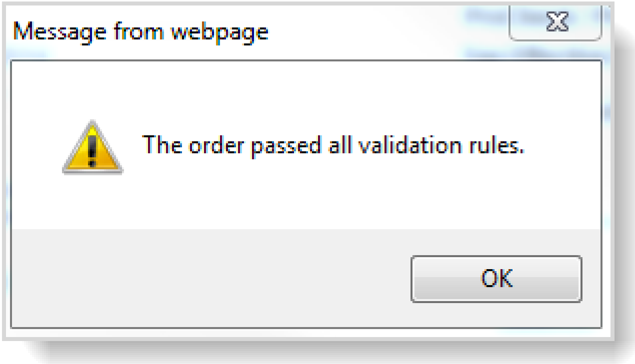


To check an order for any possible errors, locate and select the *Validate Order* button at the bottom of the page.

The Funeral Home User or Funeral Home Director roles will not include the *Validate Order* button. Rather, upon selection of the *Submit* button, the order will be validated and saved and the user will be returned to the Decedent Page.

Validation checks the order against all business and jurisdiction rules in the system. If any errors are returned, they must be corrected and the order re-validated until all edit rules pass.

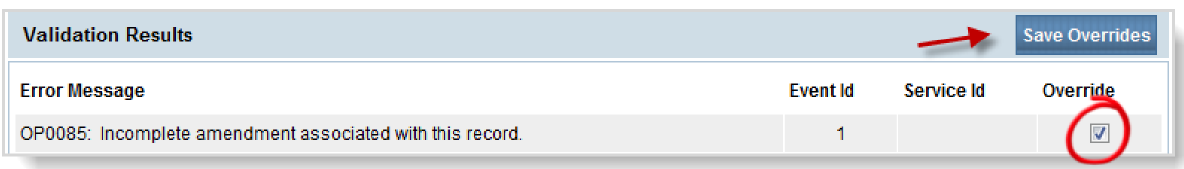
If there are no errors reported and the order passes all validation rules, a confirmation popup message appears. The order can then be processed.



If errors are found, the Validation Results window is displayed below the Order Summary page. Correct or override errors and return to the Summary page and re-validate the order.

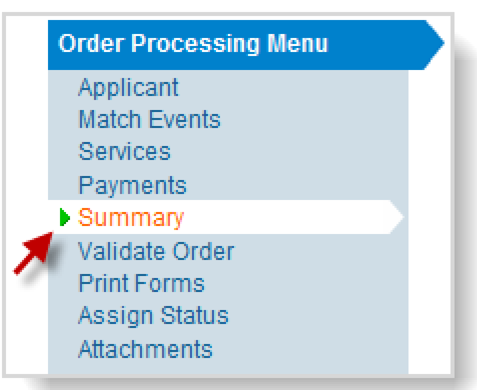
Not all errors can be overridden!

If the errors can be overridden, a checkbox appears in the *Override* column. To override and continue with order processing, select the *Override* column's checkbox and click the *Save Overrides* button.

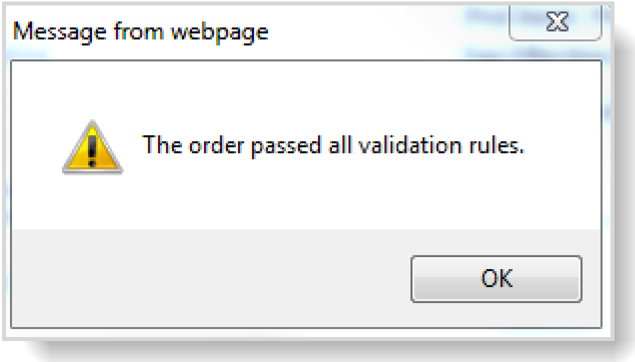


If the order contains multiple requests and/or multiple services, each request and service will be validated. If all Validation Rules PASS upon selection of the *Validate Order* link or button:

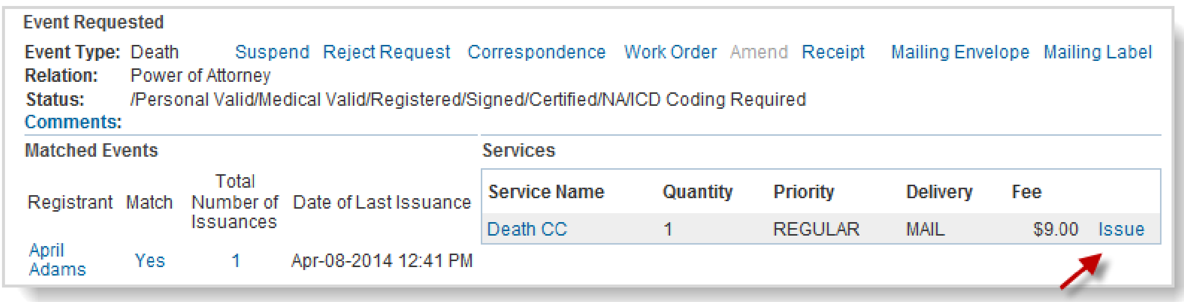
- A green indicator will be displayed on the Summary menu link.



- The Validation Results page will not be displayed. Instead, the user receives the following confirmation message:

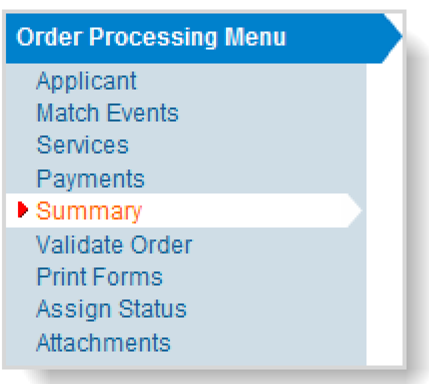


- An *Issue* link will be enabled within the Services section of the Order Summary page.

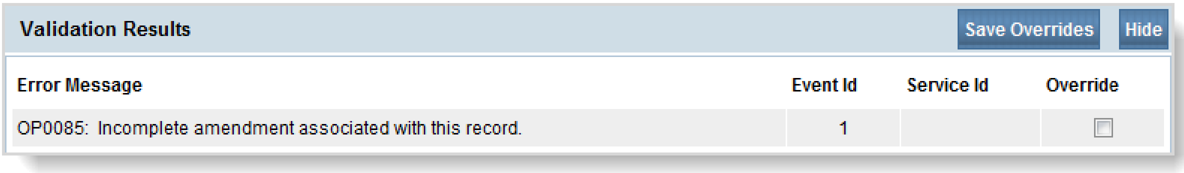


If one or more Validation Rules FAIL, upon selection of the Validate Order link or button:

- A red indicator will display on the Summary menu link.



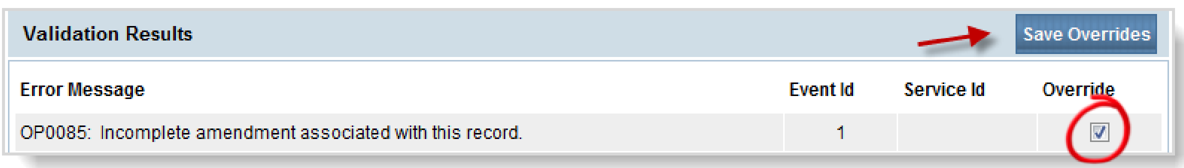
- The Validation Results page will display failure details that include columns for Error Message, Event Id, Service Id and Override.



Event ID: The value displayed within the Event Id column is based on the event request that caused the rule to fail. For example, if Request 1 caused the rule to fail but Request 2 did not, then the value of "1" would be displayed in the Event Id column.

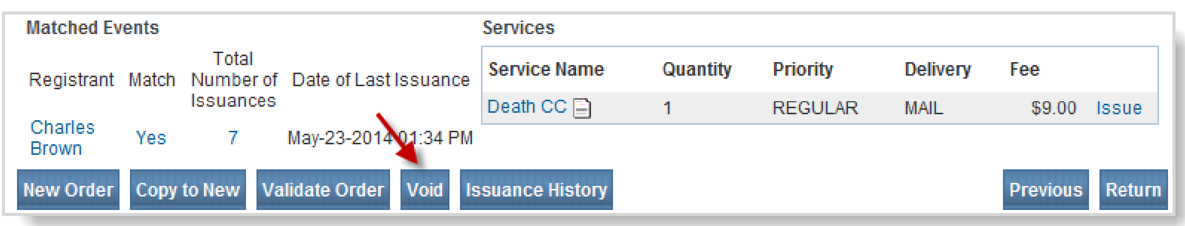
Service ID: The value displayed for the Service Id is based on the service that caused the rule to fail. For example, if Service Request 1 caused the rule to fail but Service Request 2 did not, then the value "1" would be displayed in the Service Id column. If a rule fails for 2 services (line items) and/or event requests (order subjects), then "(1:2)" would appear within the Service Id column.

An order can be processed even if there are validation rule failures. Place a checkmark ☑ in the *Override* checkbox next to the Error Message to be overridden and select the *Save Overrides* button.



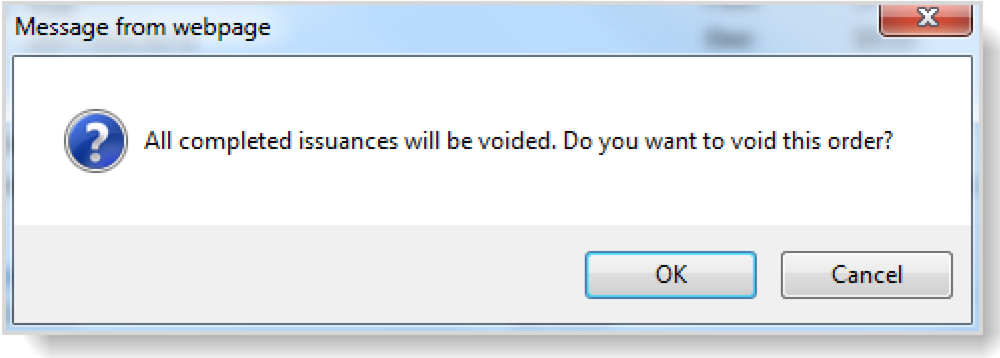
10.8 Void Order

Voiding an order in DAVE™ is possible through the *Void* button on the Order Summary page.



The void is handled differently according to whether the order has issuances. The application prompts in the following ways:

Issuances exist: If certified copies have been printed, a verification message gets displayed: *All completed issuances will be voided. Do you want to void this order?*



Issuances do not exist: A user prompt appears asking the user to confirm the void action: *Do you want to void this order?*

Upon selection of *OK* to either message, if the *Payment Type* is *Credit Card* and the status is Approved, the following error message is displayed: *Please void the credit card payments prior to voiding the order*.

If a credit card payment with an Approved status does not exist:

Example of negative value that is inserted on the Order Summary:

Services

Service Name	Quantity	Priority	Delivery	Fee	
Death CC	1	REGULAR	MAIL	$9.00	Issue
Death CC	-1	REGULAR	MAIL	($9.00)	Issue

- All work queue status(es) will be end dated.
- Each event requested in the order will be assigned a status of Void.
- A row will be inserted into the services section service that reverses the quantity and fees of the original service.

Example of negative value that is inserted on the Services page:

Services

Source Mail Received Date May-23-2014 Fee Effective Date May-23-2014

Will this order be paid for by Credit Card?

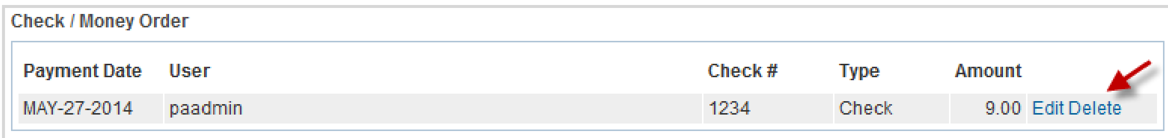
1 Name: Charles Brown

Applicant Relationship to Registrant: Power of Attorney

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	
1	Death CC	1	REGULAR	MAIL	Property Transfer		$9.00	Edit Reverse
1	Death CC	-1	REGULAR	MAIL	Property Transfer		($9.00)	Edit Reverse

If the Reverse link is selected from a row on the Services page prior to selecting the Void button, the “negative” row (i.e. the row displaying “($9.00)” in the example above) will not be inserted. Since the quantity was already set to zero by selecting the Reverse link, it is not necessary to insert a negative quantity. Since the amount due on the order is set to $0.00 after a “Void” is performed, the order may be overpaid (have a negative balance). The user must add a refund payment in order to return the overpaid amount to the customer. Or, if payments have not been cashed out, the user may delete the payment and return the payment to the customer.

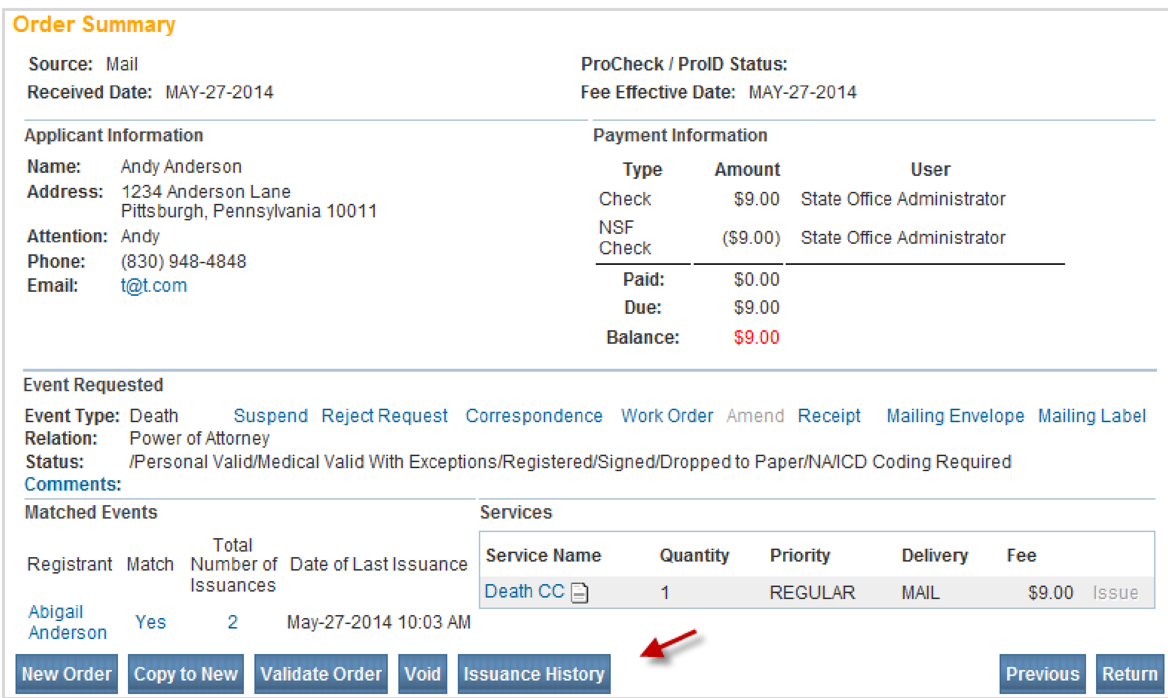
Before Cash Out, the payment can be deleted:



Once a payment is cashed out it cannot be deleted and a Refund must be added to change the balance to zero. After Cash Out, a Refund payment can be added.

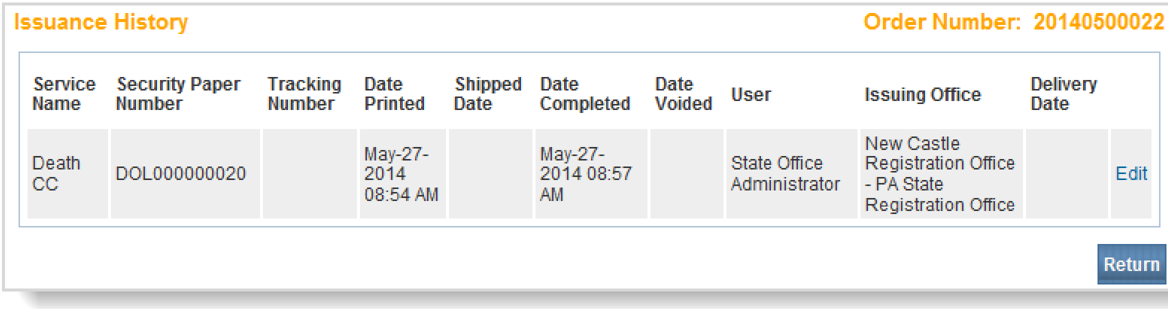
10.9 Issuance History

Locate the Issuance History button at the bottom of the Order Summary page.



Click on the Issuance History button to display the Issuance History page. This page displays a listing of all certified copies that have been issued for this record on this order only. In other words, this display is order specific. In the example below, a certificate was printed on May

27, 2014 on Security Paper Number DOL000000020. (Please see "Event and Issuance History" section earlier in this document for more detail on viewing issuance history.)



Issuance History — Order Number: 20140500022

Service Name	Security Paper Number	Tracking Number	Date Printed	Shipped Date	Date Completed	Date Voided	User	Issuing Office	Delivery Date	
Death CC	DOL000000020		May-27-2014 08:54 AM		May-27-2014 08:57 AM		State Office Administrator	New Castle Registration Office - PA State Registration Office		Edit

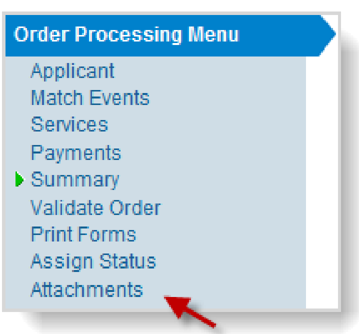
Return

10.10 Order Processing Attachments

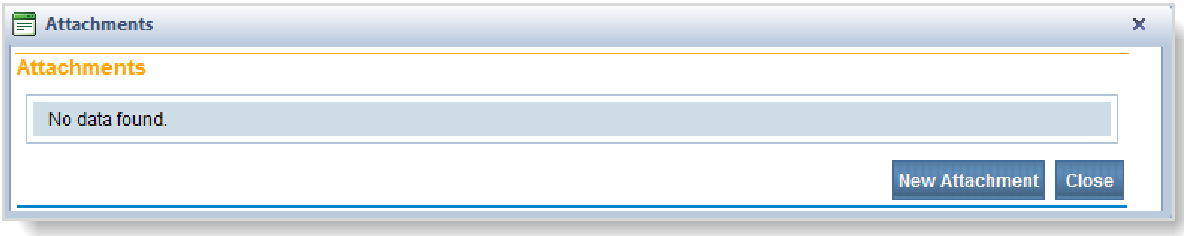
Scenarios where attachments might be uploaded and attached to orders for certified copies of death certificates include:

- An application which was completed manually and handed to a clerk could be scanned in for evidence
- A scanned copy of "identification" for the person requesting the order (such as a valid driver's license) to support giving a certified copy to the individual
- Scanned evidence of a signature if a credit card payment is used for the order
- Scanned copies of court documents (such as a letter requiring a certified copy of a death certificate) to attach to the order for supporting documentation.

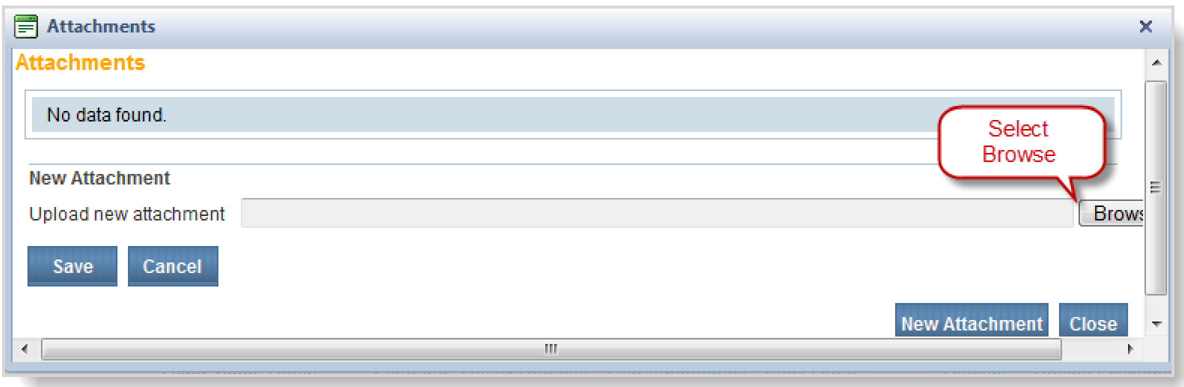
Attaching scanned documents to orders in Order Processing is done through the Attachments menu link on the Order Processing menu.



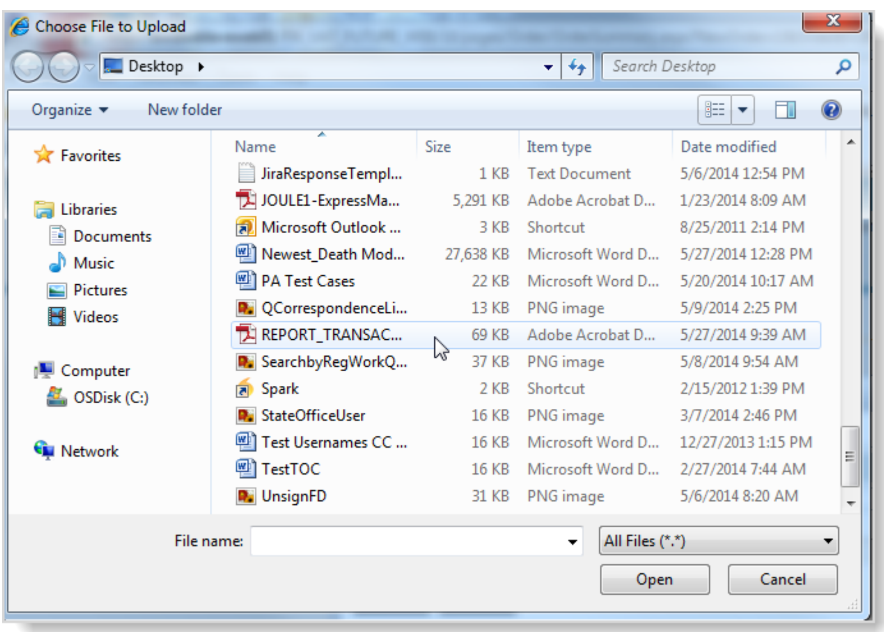
Selecting the Attachments link launches the Attachments dialog. Select the *New Attachment* button.



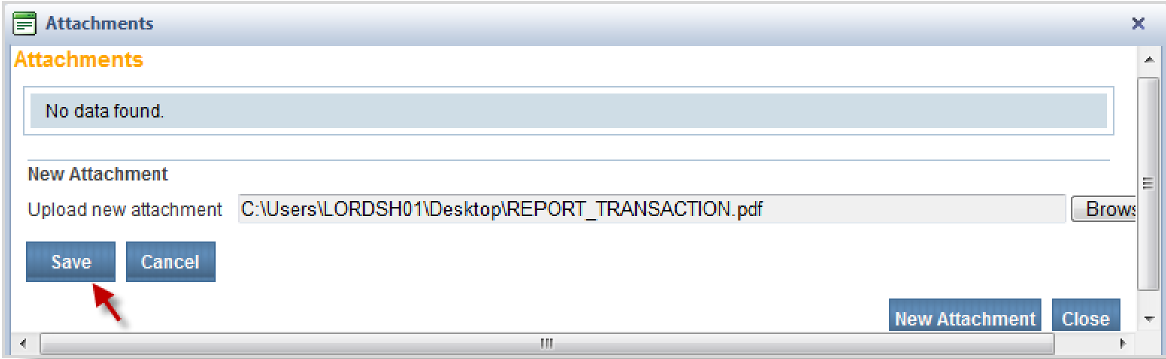
The Attachments dialog expands to allow the user to upload a new attachment. Select the *Browse* button to access documents residing on a local or network drive.



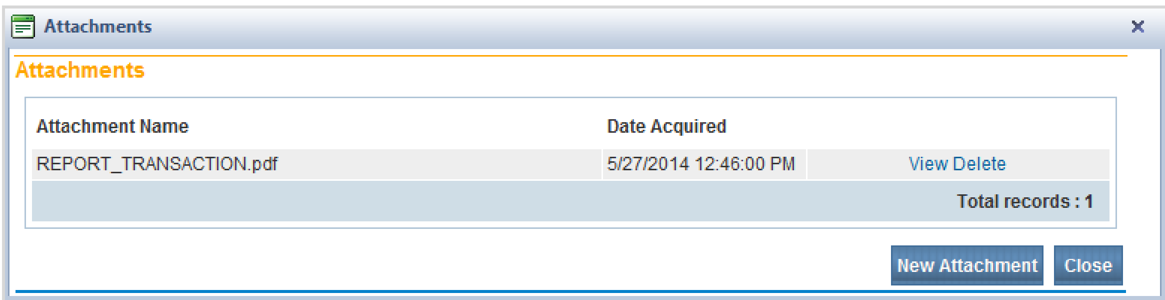
Browse the local (or network) directory to locate and select the desired document to upload. Select the *Open* button.



Click the *Save* button to complete the process and upload the file.



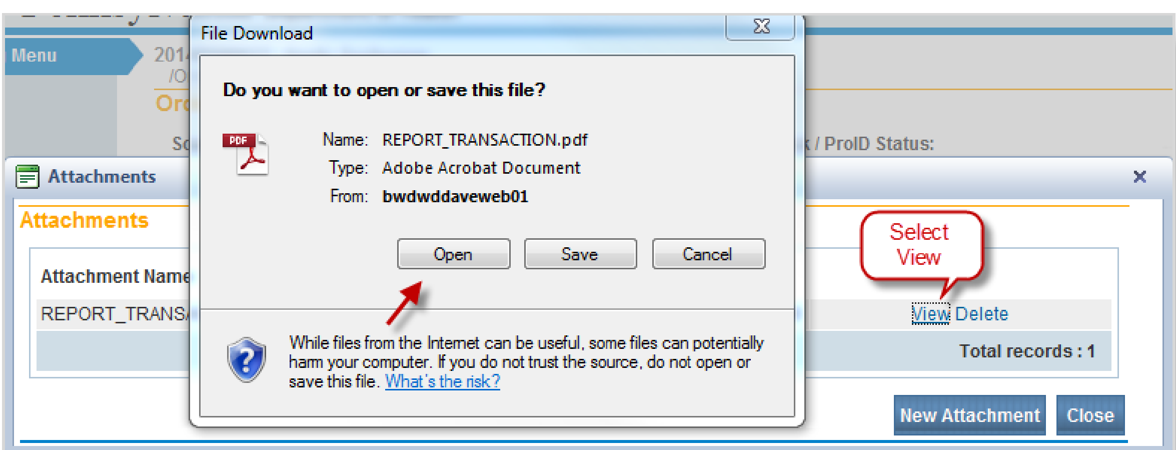
The document appears is saved as an attachment.



Attachments can be any file type. Users can upload as many attachments as necessary to an order.

10.10.1 View an Attachment to an Order

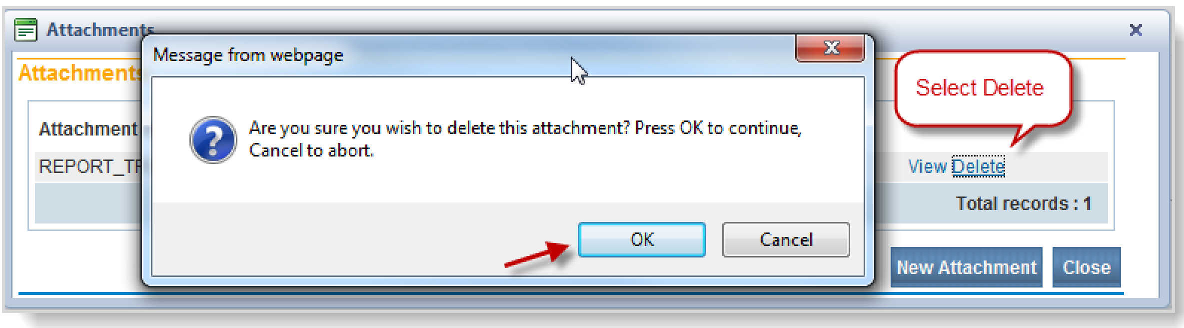
To view an attachment that has been uploaded and attached to an order, select the *View* link. The File Download dialog appears. Select *Open*.



A user must have software installed on their computer appropriate for viewing the specific attachment file type. For example, for a PDF, they must have a PDF reader; for a spreadsheet, they must have spreadsheet software, such as Excel.

10.10.2 Delete an Attachment to an Order

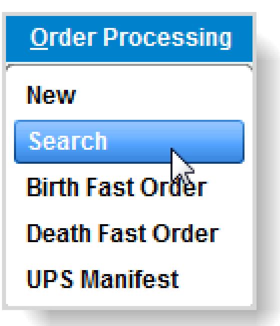
It may be necessary to delete an attachment that has been uploaded. Click the *Delete* link on the Attachments dialog. A warning message appears prompting for certainty about deleting the attachment. Select *OK* to proceed with the deletion.



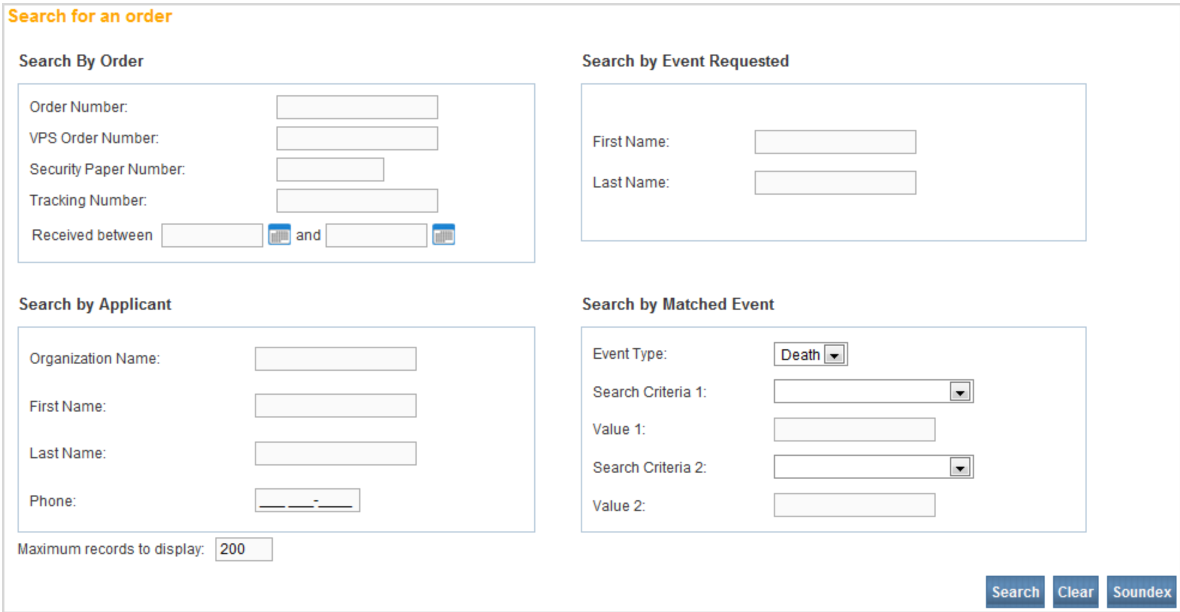
10.11 Search for an Order

This section describes how to search for and access a previously entered order by using the Search feature of the Order Processing module. The Search option will be used by central office users (State) and local office users (City, County, or Municipality) to locate customer orders.

From the Main Menu of DAVE™, select *Order Processing > Search*.



The Search for an order page opens. Search types available are organized by section.

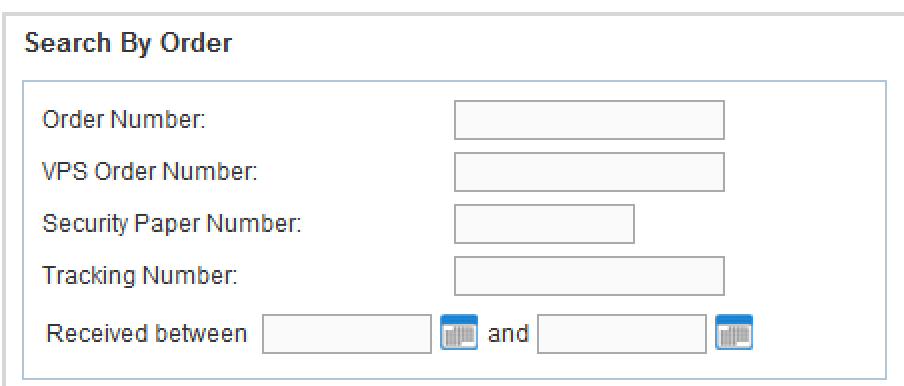


There are four search options to choose from:

1. Search by Order
2. Search by Event Requested
3. Search by Applicant
4. Search by Matched Event

To utilize any of the searching sections on this page, the user must input at least one of the requested pieces of information from within a search tab. The search controls are NOT case-sensitive.

10.11.1 Search By Order

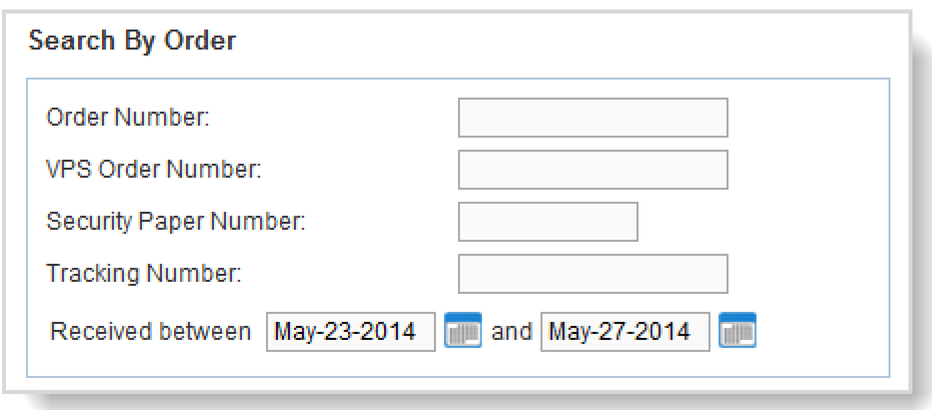


To Search by Order, information must be entered into at least one of the controls: *Order Number, VPS Order Number, Security Paper Number, Tracking Number* or *Date Received Between*. Select *Search* at the bottom of the page.

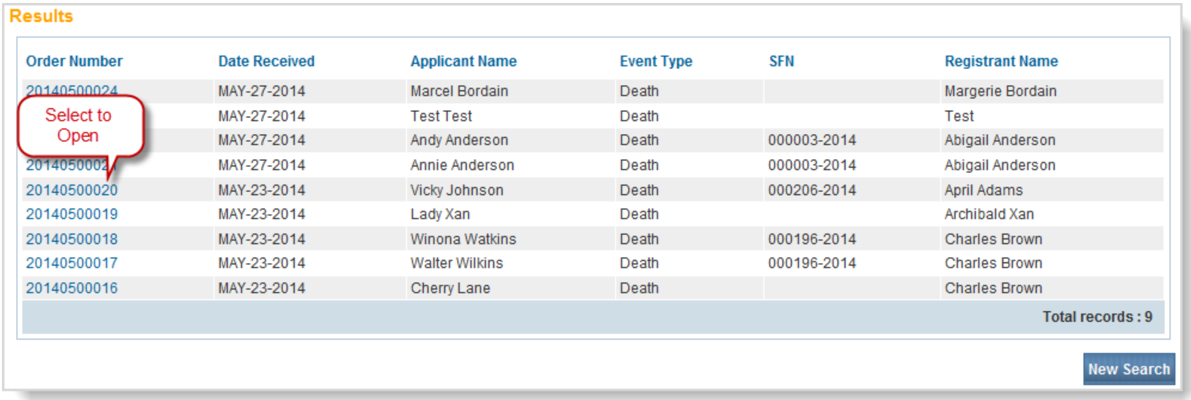
Order Number:	The order number is a unique identifier and will consist of the 4 digit year + two digit month + a five digit sequential number (e.g. 20040600001). A Search by Order can be performed using only this data field.
VPS Order Number:	Orders placed via Vitalchek.com are assigned a VPS Order Number. Enter the VPS Order number in this field.
Security Paper Number:	Also called "safety paper" by some jurisdictions, the security paper number is a pre-preprinted number used to identify and track pieces of security paper. This pre-printed number is unique to the paper type (e.g. wallet, short, long, etc.). A Search by Order can be performed using only this data field.
Tracking Number:	Typically the tracking number is only assigned to orders being shipped by FedEx, UPS or other express mail service. A Search by Order can be performed using only this field.
Received between ___ and ___:	The dates entered should be an estimate of when the order was received by the office that entered the order. To search by date range both the start date and end date must be entered. If only the Start Date is entered, then a search will be performed on an exact match of the Start Date. Date based searches may not always be successful. If End Date is earlier than Start Date then no results will be returned. If Start Date is used without an End Date then only those orders requested on that specific date will be returned. It is possible to search using an End Date without a corresponding Start Date. This search criteria returns all orders entered up to that date. The resulting list of orders would likely be too large to be useful.

A successful Search by Order should always return at least one order.

An example of a Search by Order using a date range is as follows:



The results returned appear below. To open an order, select the *Order Number* link of the desired record.

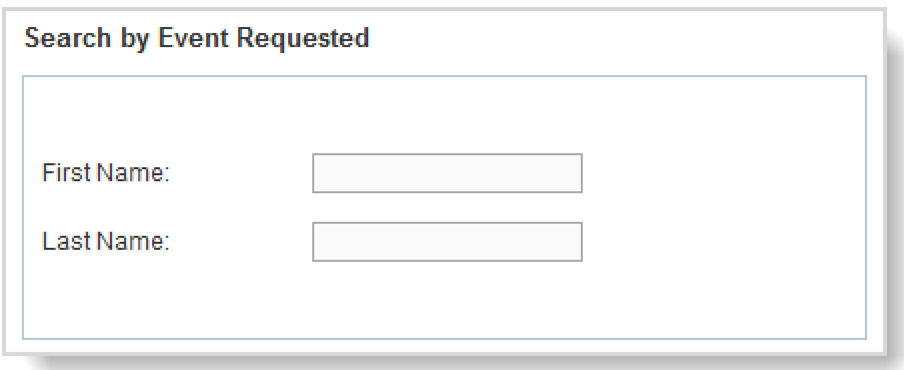


Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20140500024	MAY-27-2014	Marcel Bordain	Death		Margerie Bordain
[illegible]	MAY-27-2014	Test Test	Death		Test
[illegible]	MAY-27-2014	Andy Anderson	Death	000003-2014	Abigail Anderson
2014050002[illegible]	MAY-27-2014	Annie Anderson	Death	000003-2014	Abigail Anderson
20140500020	MAY-23-2014	Vicky Johnson	Death	000206-2014	April Adams
20140500019	MAY-23-2014	Lady Xan	Death		Archibald Xan
20140500018	MAY-23-2014	Winona Watkins	Death	000196-2014	Charles Brown
20140500017	MAY-23-2014	Walter Wilkins	Death	000196-2014	Charles Brown
20140500016	MAY-23-2014	Cherry Lane	Death		Charles Brown

Total records : 9

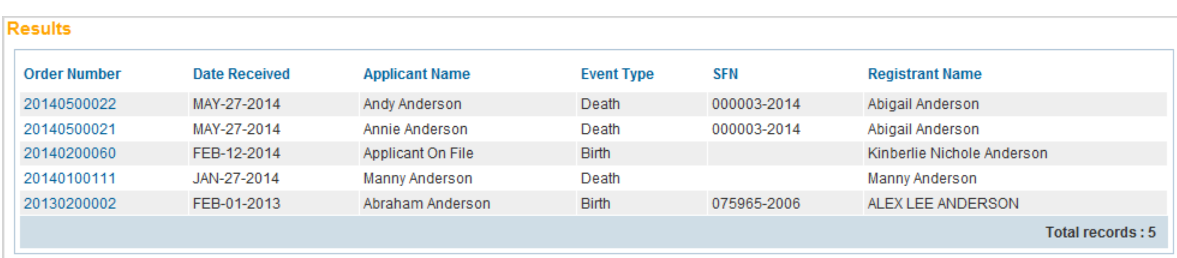
10.11.2 Search by Event Requested



Search by Event Requested permits a search for an order based on the *First Name* and/or *Last Name* of the decedent.

First Name	Entering the first name is optional. If a value is entered in the First Name field it must exactly match the name entered on the customer's application.
Last Name	When searching by event requested, the last name is a required field. The name entered here must be the name provided on the customer's application and subsequently entered on the Match Event page.

A successful Search by Event Requested most often returns a list of orders. By entering "Anderson" in the *Last Name* field, the search returns the following results:

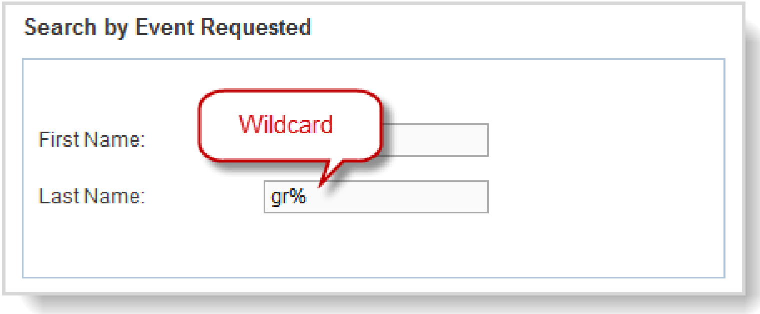


Results

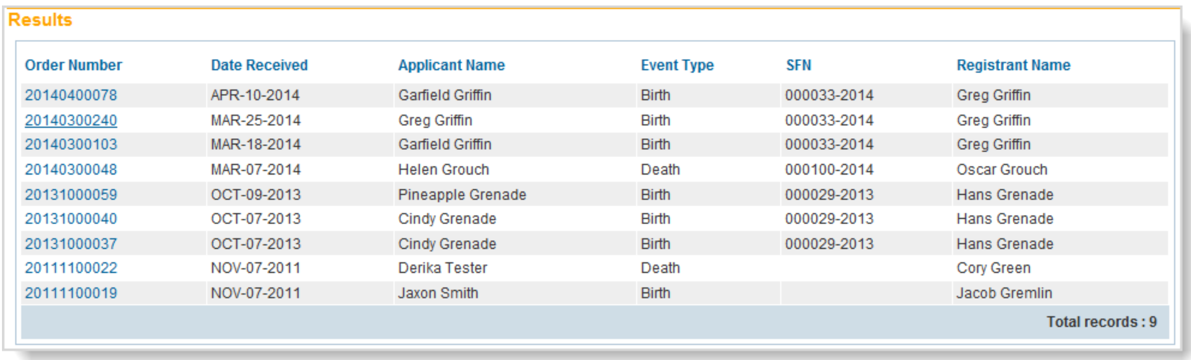
Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20140500022	MAY-27-2014	Andy Anderson	Death	000003-2014	Abigail Anderson
20140500021	MAY-27-2014	Annie Anderson	Death	000003-2014	Abigail Anderson
20140200060	FEB-12-2014	Applicant On File	Birth		Kinberlie Nichole Anderson
20140100111	JAN-27-2014	Manny Anderson	Death		Manny Anderson
20130200002	FEB-01-2013	Abraham Anderson	Birth	075965-2006	ALEX LEE ANDERSON

Total records : 5

Using the wildcard is permitted in a **Search by Event Requested**. Enter a letter (here the letter "g" was used), followed by the wildcard symbol "%."



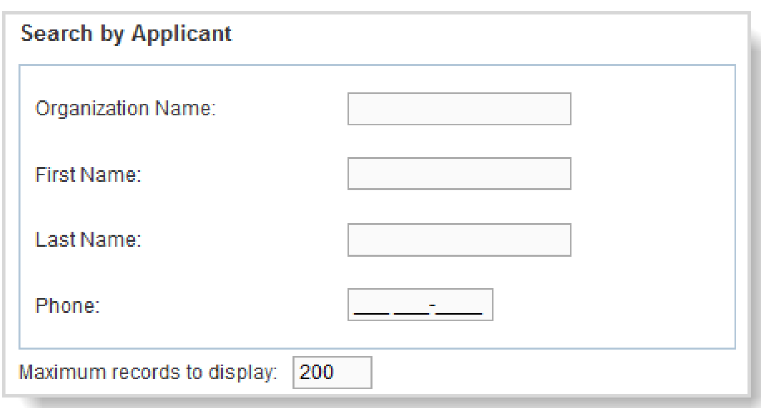
This searches for all orders entered for a death event with a *Last Name* beginning with the letters "gr." The Results of a Search by Event Requested using a wildcard appear below.


Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20140400078	APR-10-2014	Garfield Griffin	Birth	000033-2014	Greg Griffin
20140300240	MAR-25-2014	Greg Griffin	Birth	000033-2014	Greg Griffin
20140300103	MAR-18-2014	Garfield Griffin	Birth	000033-2014	Greg Griffin
20140300048	MAR-07-2014	Helen Grouch	Death	000100-2014	Oscar Grouch
20131000059	OCT-09-2013	Pineapple Grenade	Birth	000029-2013	Hans Grenade
20131000040	OCT-07-2013	Cindy Grenade	Birth	000029-2013	Hans Grenade
20131000037	OCT-07-2013	Cindy Grenade	Birth	000029-2013	Hans Grenade
20111100022	NOV-07-2011	Derika Tester	Death		Cory Green
20111100019	NOV-07-2011	Jaxon Smith	Birth		Jacob Gremlin

Total records : 9

10.11.3 Search by Applicant



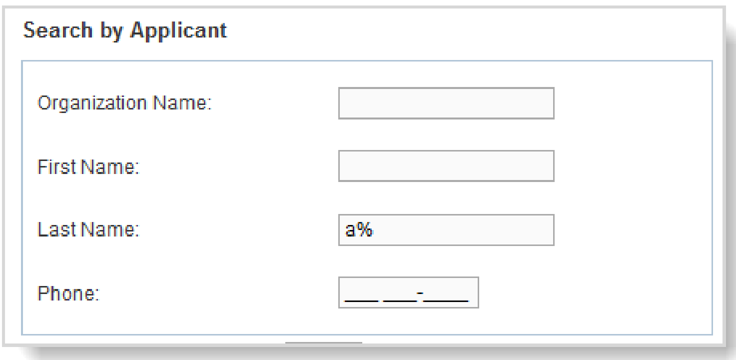
To Search by Applicant (the person or organization originally placing the order) the user must input at least the applicant's *Last Name*.

Organization Name	When searching for an order by *Organization Name* (i.e., state agency, hospital, etc.), no other fields are required.

First Name	When searching by applicant name, if a value is entered in the *First Name* field, *the Last Name* is required.
Last Name	When searching by applicant name, the *Last Name* is required.
Phone	When searching for an order by an applicant's telephone number, no other fields are required.

To Search by Applicant, enter a valid applicant name and select the *Search* button at the bottom of the page. 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* and/or *Organization Name* helps narrow the results further.

Wildcard searches are permitted when performing a Search by Applicant. Enter a letter followed by the wildcard symbol % in the *Last Name* field. In this example the letter "a" is used.



The search Results page displays all orders with Applicant *Last Name* beginning with the letter "a."

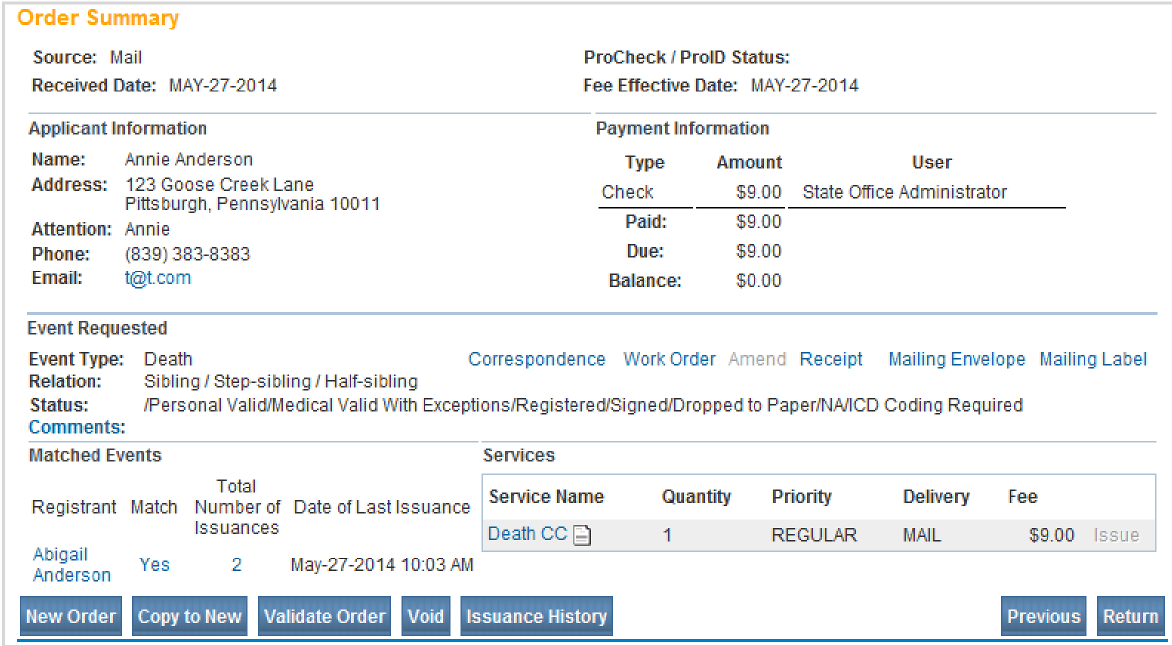
Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20140500022	MAY-27-2014	Andy Anderson	Death	000003-2014	Abigail Anderson
20140500021	MAY-27-2014	Annie Anderson	Death	000003-2014	Abigail Anderson
20140400072	APR-10-2014	Andrew Ant	Birth	000027-2014	Adam Ant
20140400071	APR-10-2014	Andrew Ant	Birth	000027-2014	Adam Ant
20140400041	APR-08-2014	Annie Adams	Death	000206-2014	April Adams
20140300268	MAR-26-2014	Annie Apple	Birth		Apple
20140300234	MAR-25-2014	Annie Ant	Birth	000027-2014	Adam Ant
20140300215	MAR-24-2014	Anne Apple	Birth		Adam Apple
20140300214	MAR-24-2014	Annie Apple	Birth Birth		Adam Apple apple
20140300134	MAR-18-2014	Albert Ashe	Death		Alfred Ashe
20140300133	MAR-18-2014	Albert Ashe	Death		Alfred Ashe
20140300131	MAR-18-2014	Clarence Ashe			
20140300126	MAR-18-2014	Ann Apple	Death	000115-2014	Adam Middle Apple
20140300097	MAR-18-2014	Axle Ant	Birth	000027-2014	Adam Ant
20140300084	MAR-17-2014	Jan U Airy	Death	000029-2014	Jan U Airy

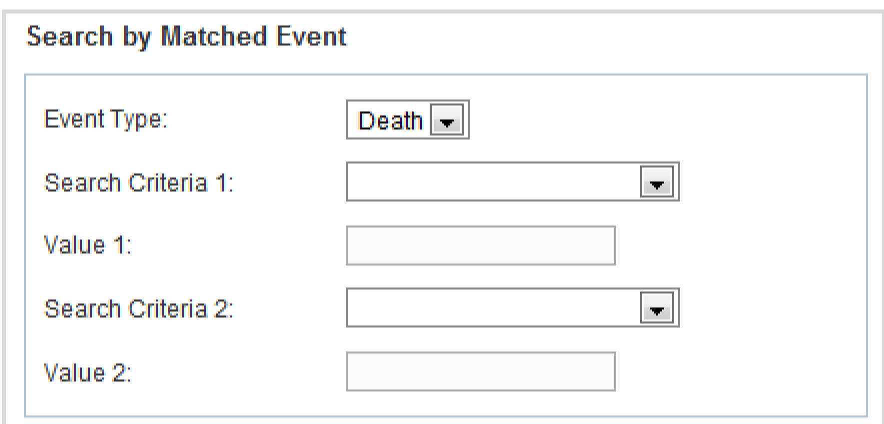
First 1 2 3 4 5 Last — Total records : 74

If only the Applicant *First Name* is entered, the system will generate an error message.

Select the Order Number link to open an order. The Order Summary page displays the details of the specific record.



10.11.4 Search by Matched Event



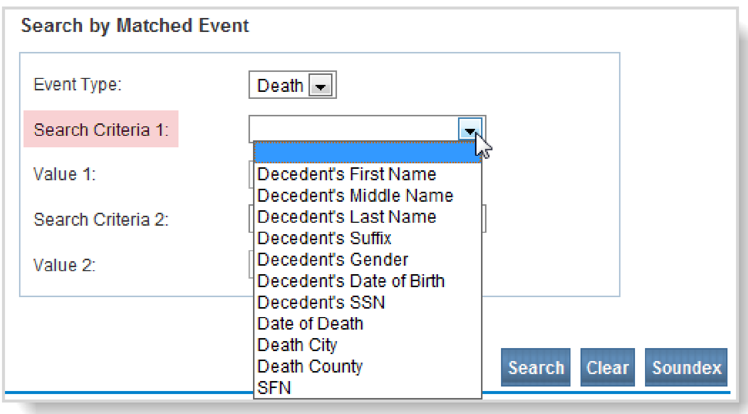
A Search by Matched Event is based on the *Event Type* selected from the dropdown and on whether a successful match was performed and associated with an order. This search ONLY returns orders where the event requested was successfully matched to a record in the database.

Event Type	Death must be selected from the dropdown for death registration-related orders.
Search Criteria 1	Upon selection of the Event Type, the Search Criteria 1 dropdown is populated with data controls found on the pages associated with death events.

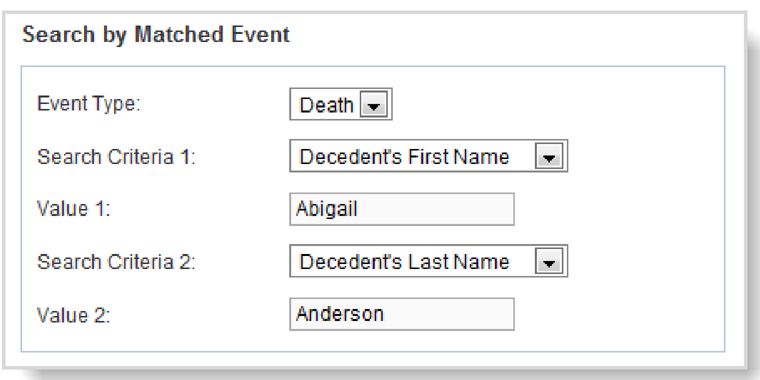
Value 1	Upon selection of a value from the Search Criteria 1 dropdown, the user must enter valid data in the Value 1 text entry control that ties directly to the selection made in Search Criteria 1.
Search Criteria 2	Upon selection of the Event Type, the Search Criteria 2 dropdown is populated with data controls found on the pages associated with the event.
Value 2	Upon selection of a value from the Search Criteria 2 dropdown, the user must enter valid data in the Value 2 text entry control that ties directly to the selection made in Search Criteria 2.

The Search by Matched Event section allows searching for the matched event by more than one criterion

Select the *Search Criteria 1* from the dropdown, and enter the corresponding information in the *Value 1* field.



The following example shows *Search Criteria 1 & 2* selections and *Values 1 & 2* .



When searching by Matched Event, a minimum of *Event Type*, *Search Criteria 1*, and *Value 1* must be selected/entered.

Key in valid entries for one or more Search Criteria and Value fields and select the *Search* button at the bottom of the page.

Event based searches may not always be successful. When they are successful, they can return one or many records. The results below include all orders for records with decedent's last name of "Anderson" on the death certificate.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20140500022	MAY-27-2014	Andy Anderson	Death	000003-2014	Abigail Anderson
20140500021	MAY-27-2014	Annie Anderson	Death	000003-2014	Abigail Anderson

Total records : 2

New Search

Wildcards are permitted in a Search by Matched Event. Here the *Search Criteria 1* selected is the *Decedent's Last Name*, and the letters "ad" and the wildcard symbol % are entered for *Value 1*.

Search by Matched Event

Event Type:	Death
Search Criteria 1:	Decedent's Last Name
Value 1:	ad%
Search Criteria 2:	
Value 2:	

The search Results page returns orders where the decedent Last Name begin with the letters "ad."

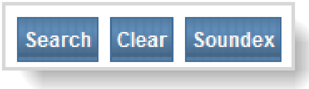
Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20140500020	MAY-23-2014	Vicky Johnson	Death	000206-2014	April Adams
20140400041	APR-08-2014	Annie Adams	Death	000206-2014	April Adams
20140300057	MAR-10-2014	Amy Adkins	Death	000094-2014	Adkins
20140300056	MAR-10-2014	Amy Adkins	Death	000094-2014	Adkins
20140300055	MAR-10-2014	Amy Adkins	Death	000094-2014	Adkins
20140300054	MAR-10-2014	Amy Adkins	Death	000094-2014	Adkins
20140300053	MAR-10-2014	Amy Adkins	Death	000094-2014	Adkins
20140300052	MAR-10-2014	Amy Adkins	Death	000094-2014	Adkins
20131100006	NOV-05-2013	Abe Adams	Death	000153-2013	Andrew Abraham Adams Jr.
20131000038	OCT-07-2013	Chancler Adams	Death	000029-2013	Gramatical Adams
20130700057	JUL-08-2013	Anton Adamson	Death	000047-2013	Alton Adamson
20130700056	JUL-08-2013	Anton Adamson	Death	000047-2013	Alton Adamson
20130300021	MAR-08-2013	F.Kreuger's Dirt Nap Emporium	Death	000001-2013	Black Melanie Adder
20130300020	MAR-08-2013	F.Kreuger's Dirt Nap Emporium	Death	000001-2013	Black Melanie Adder

Total records : 14

New Search

10.11.5 Performing the Search

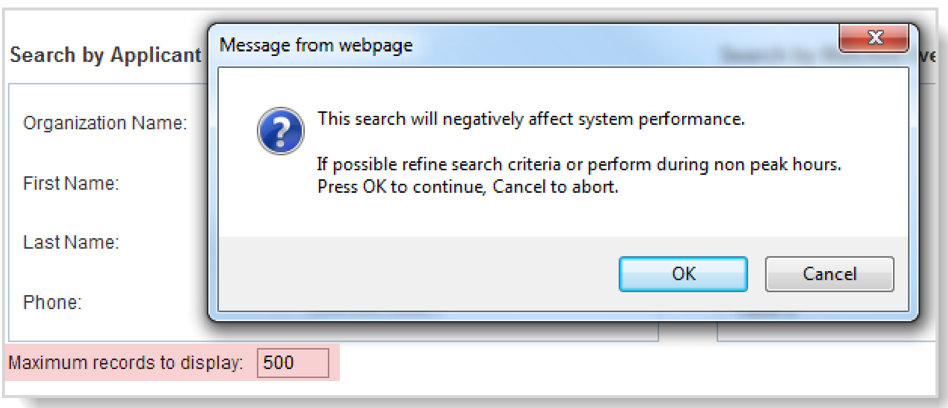


To initiate a search based on the criteria and values entered, select the *Search* button. Or, to remove search criteria and start over, select the *Clear* button at the bottom of the page.

Another search option is the *Soundex* search. *Soundex* searches are used when the spelling of a name is uncertain. Users can enter a sounds-like name (i.e., “Smith” for “Smythe”) and still successfully locate a record.

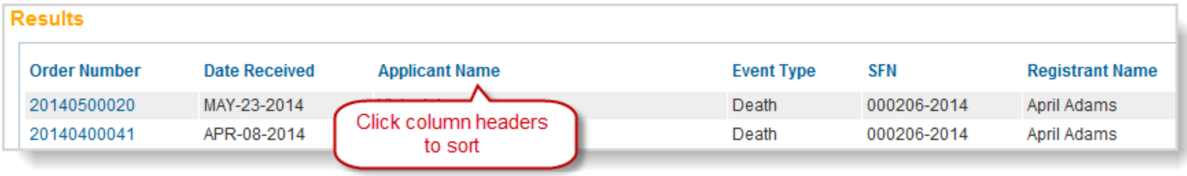
DAVE™ also allows use of a wildcard feature via the % character to search for records when only a partial spelling is known (i.e., searching for “Mur%” returns names like Murdock or Murphy.

The Maximum records to display defaults to 200. This means regardless of the number of orders returned by the search, only 200 rows will be displayed. It is possible to increase the value for maximum records to display. But, when the number is increased, the user receives a warning message about system performance.

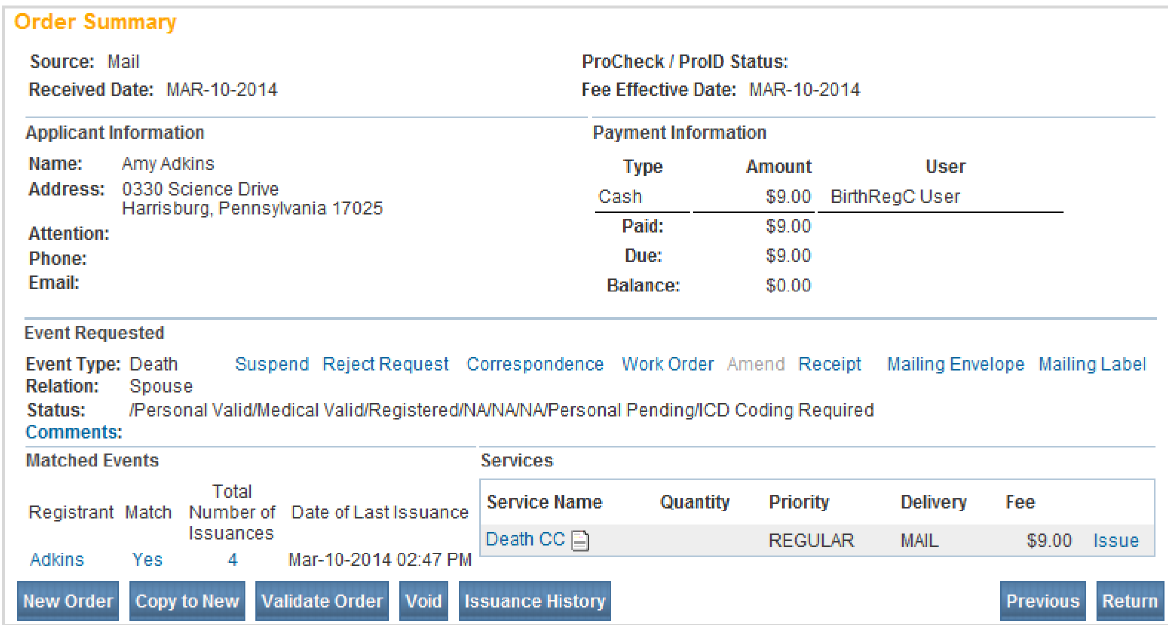


These types of searches should be kept to a minimum and performed after hours. If possible, users should enter more search criteria to refine the search.

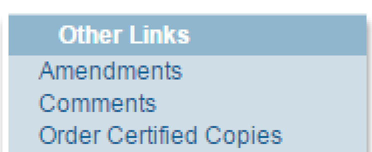
Selecting any of the underlined column headers will re-sort the search results based on the contents of that column. Selecting the *Order Number* link opens directly to the Order Summary page for review/editing of the order.



After reviewing the Order Summary page, select the *Previous* or *Return* button to return to the Results page.

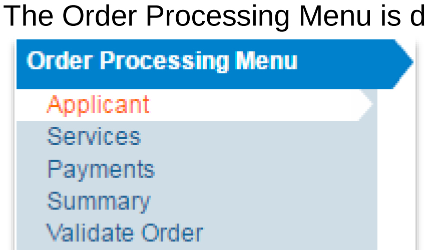


10.12 Order Certified Copies

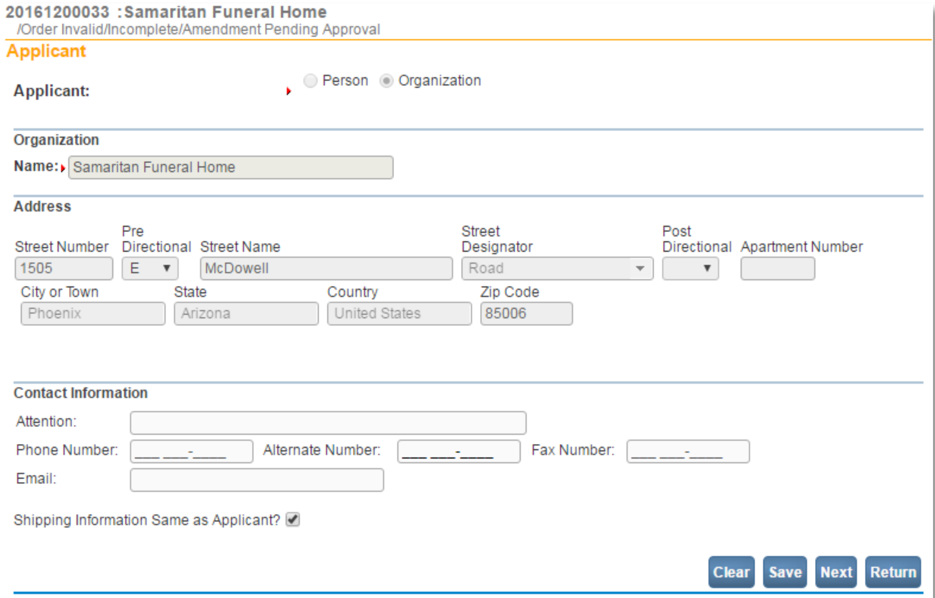


From the Death or Fetal Death Registration Menu select Other Links > Order Certified Copies.

The Order Processing Menu is displayed replacing the Death Registration Menu.



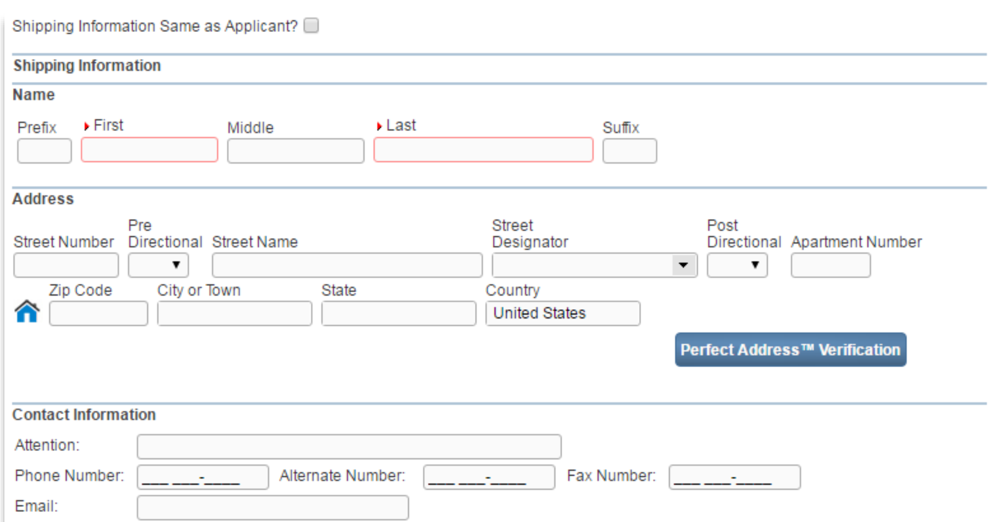
The Applicant page is also displayed and pre-filled with the name and address information associated to the Funeral Home completing the order.



10.12.1 Applicant Information

The pre-filled Applicant Name and Address items cannot be edited. However, Contact Information fields remain available so information can be added to specify a contact in regards to the order.

The Shipping Information Same as Applicant? Checkbox defaults to checked. If the certified copies should be sent somewhere other than the Funeral Home listed, select the check box to remove the checkmark and enter shipping information.



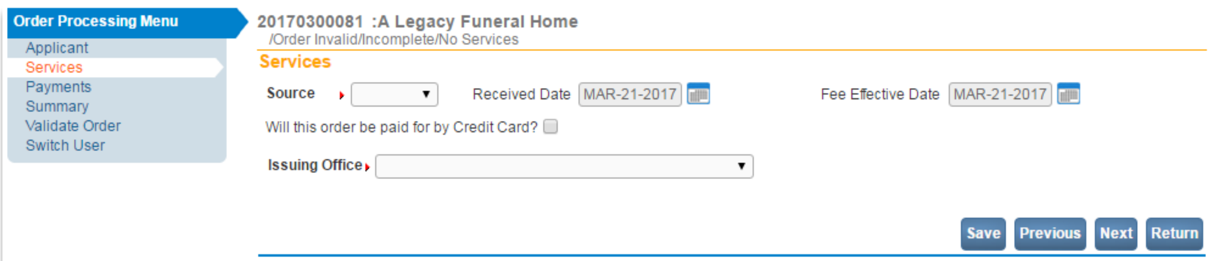
The page will expand and allow for information to be entered in regards to where the certified copies should be shipped.

Once the applicant page is complete, select Next.

Selecting **Clear** will clear all information that has been entered on the page.
Selecting **Save** will save the information that has been entered on the page.
Selecting **Return** will return the user to the last page they took action on.

10.12.2 Services

The *Services* page will be displayed.

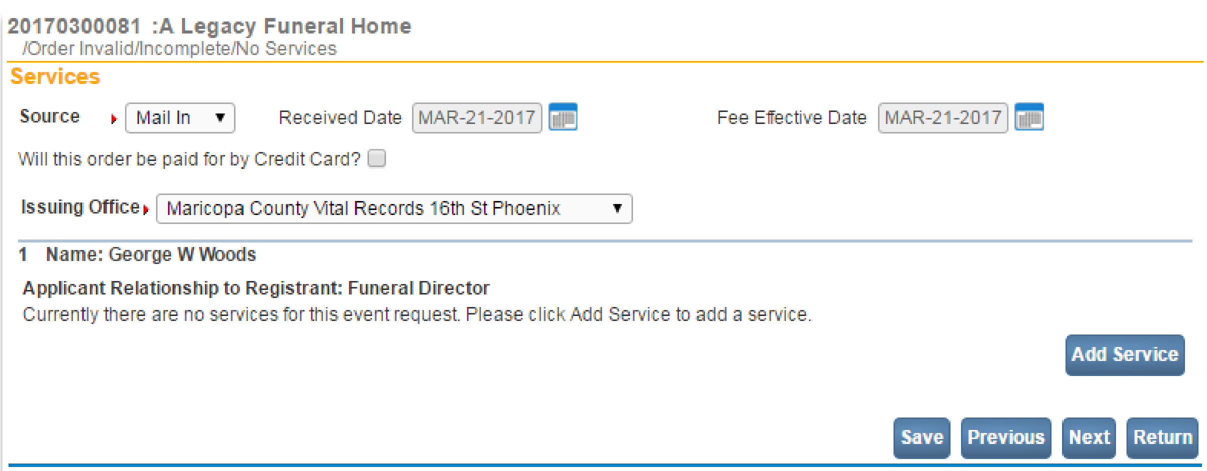


Select the *Source* for the Order.

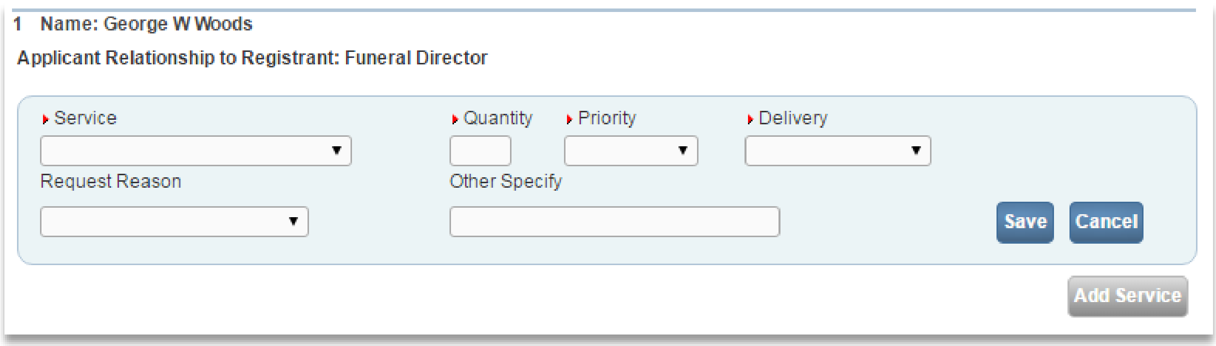
Next Selecting the Issuing Office.

The *Issuing Office* dropdown list is filtered based on the County of Event. If the more than one issuing office exists per county a selection will need to be made. However, if only one issuing office exists, this *Issuing Office* field will be pre-filled with the specific issuing office.

Once the Issuing Office is selected the page will refresh and display the Name section.



Select the Add Service button to add services to the order. The name section will expand to display the services section.



Service: Select the *Service* (i.e., the type of product the applicant is requesting). The *Service* dropdown is filtered by office and event type.

Quantity: Enter the number of the selected service being requested.

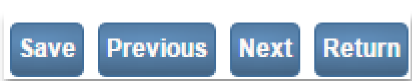
Priority: The selection made here determines if the order requires expedited processing and whether additional fees should be applied.

Delivery: Select a method of delivery from the *Delivery* dropdown (i.e., *Counter, Mail, UPS*).

Request Reason: Select the reason for the request from the *Request Reason* dropdown. If Other is selected then the **Other Specify** field will be enabled for entry.

Select *Save* to add the services. Selecting *Cancel* will close the Add Services section without adding services to the Order.

If additional services need to be added to the Order simply select the Add Service button again to add additional services.

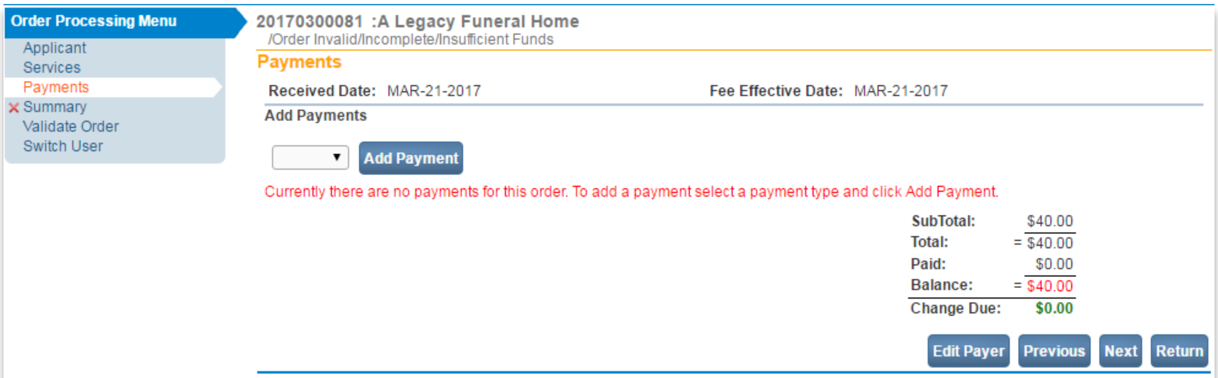


Once the *Services* page is complete, select Next.

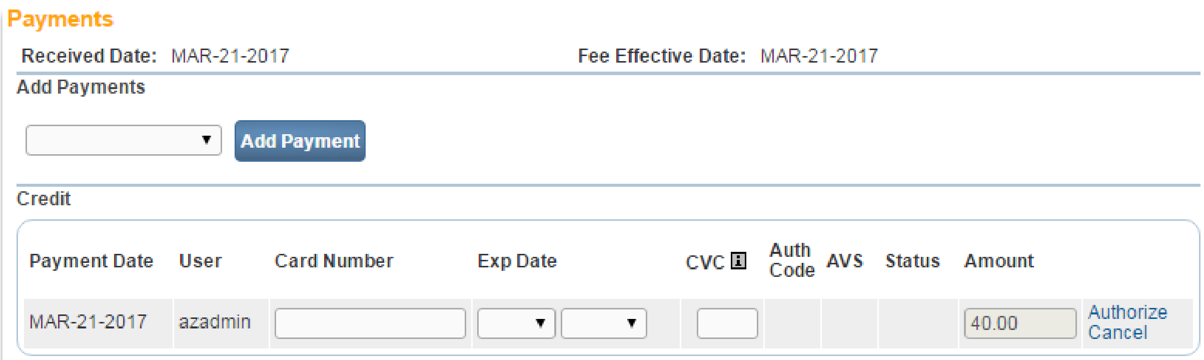
Selecting **Save** will save the information that has been entered on the page.
Selecting **Previous** will return the user to the last page they took action on.
Selecting **Return** will return the user to the last page they took action on.

10.12.3 Payments

The Payments page will be displayed.



Select *Credit Card* from the add payments dropdown and then select the *Add Payment* button.



Enter a credit card number within the Card Number field.

Enter the credit card expiration date within the Exp Date field by selecting the month from the first dropdown and the year from the second dropdown.

Enter the security code found on the back of the credit card in the CVC field.

CVC code: DAVE™ requests the card validation code be entered for credit card transactions. These validation codes combat counterfeit fraud through the use of special numbers that are encoded on the magnetic strip of credit and debit cards. The VISA Card Verification Value (CVV) and the MasterCard and Discover credit cards' Card Validation Code (CVC) are found on the back of the card. The American Express unique card code (CID), is found on the front of the card above the credit card number.

> The transaction will not be authorized if the code is left blank or if it does not match the code maintained by the card processor.

Hover over the information icon for help in locating and entering the CVC code information.

Select the *Authorize* link to submit the credit card information for payment. Select the *Cancel* link to discard the Credit Card information without submitting for payment.

Credit card numbers are **NOT** stored in the DAVE™ database. Upon selection of the *Authorize* or *Void* links, the credit card number will be passed to the VitalChek authorization server and will be cleared from the Payments page.

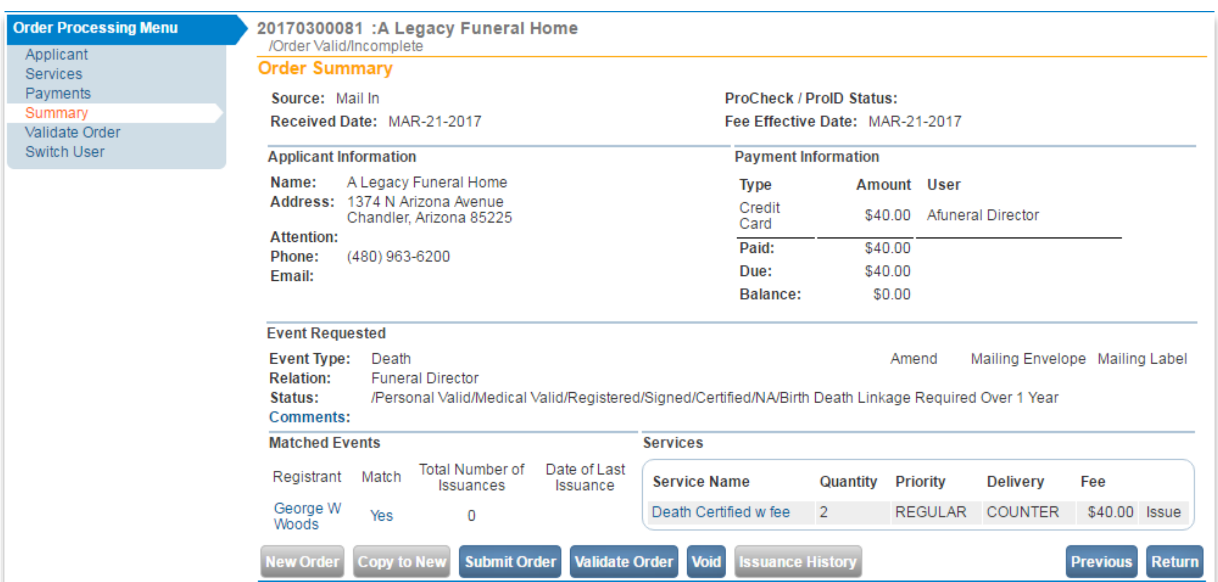
Once the payment has been approved, select the *Next* button.

Selecting **Save** will save the information that has been entered on the page.
Selecting **Previous** will return the user to the last page they took action on.
Selecting **Return** will return the user to the last page they took action on.

Select the **Edit Payer** button if the payment is going to be submitted by someone other than the Funeral Home submitting the Order. See section 10.5.3 Edit Payer for more info.

10.12.4 Order Summary

The Order summary page will be displayed.



Select to **Validate the Order** button to review any issues that may exist and correct them.

Select the **Void** button to void the Order.

Select the **Submit Order** button to submit the Order to the Issuing Office selected on the Services page.

More information regarding items on the *Order Summary* page can be found in section 10.6 Order Summary.

11. Queues

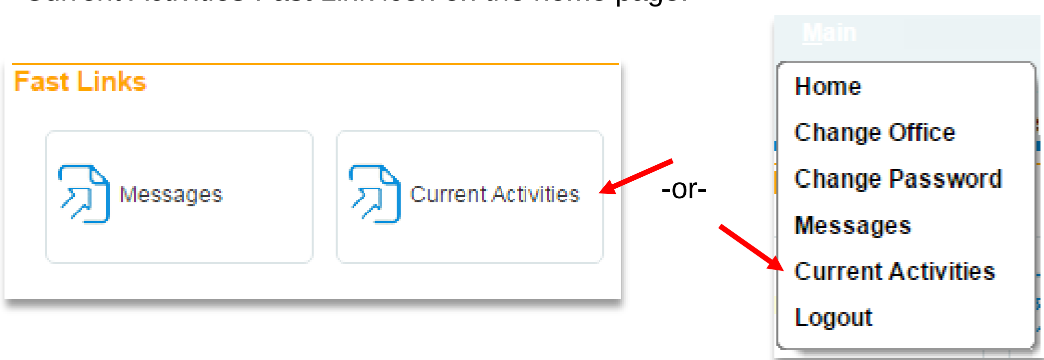
DAVE™ provides work queues which contain records, orders, issuances, or amendments that are in process. These item are placed in queues based on the assignment of a work queue status. Work queue statuses are assigned after a record or order has been validated or, when a specific action has been taken by a user that sets a status. Queues are used to group items together based on the type of work that needs to be done.

Users with the appropriate security privileges will be able to access particular work queues and work queue types.

11.1 General Functionality in All Queues

There are two ways to access Queues within DAVE™.

Current Activities - From the Main Menu, select *Main > Current Activities*, or select the *Current Activities* Fast Link icon on the home page.

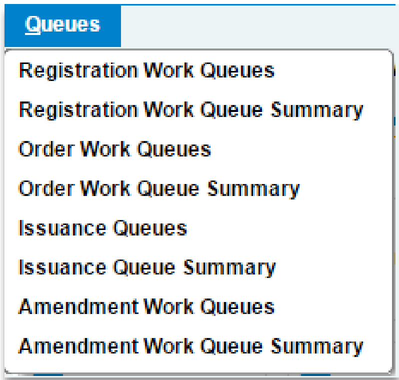


The *Current Activities* queue is unique to the user type selecting to view it. Unlike selecting a specific queue from the Main Menu, the Current Activies displays on a single page all of the different work queues containing cases and orders needing attention.

Current Activities

Queue Name	Type ↓	Count	Age of Oldest in Days
Keyed	Amendment	132	80
Keyed (Requires Affirmation)	Amendment	25	7
Pending	Amendment	17	23
Affirmation Required	Fetal Death	27	59
Certification Required	Fetal Death	12	59
Medical Pending	Fetal Death	279	78
Personal Pending	Fetal Death	262	78
FIPS Coding Required	Death	216	86
Cause of Death Pending	Death	23	72
Certification Required	Death	8	83
Cremation Clearance Required	Death	3	8
Death Potential Duplicate	Death	30	79
Death Certificate Not Found	Order	1	23
Insufficient Funds	Order	3	2
No Services	Order	46	86
Registration on Hold	Order	1	78
			Total Queues : 16

Main Menu – The second way to access queues is via the *Main Menu* where you can select *Queues* and a menu of available queues is displayed:



The ability to access particular queues is based on user security privileges.

Queue Types:

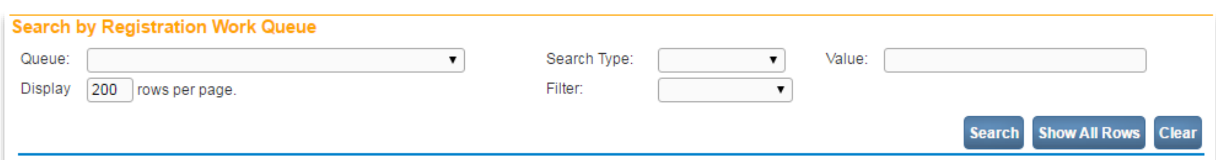
- Registration Work Queues
- Order Work Queues
- Issuance Queues
- Amendment Work Queues

11.1.1 Queue vs. Queue Summary

There are two ways to view Queue Information: by selecting a specific work queue (Registration Work Queue, Amemdments Work Queue, Issuance Queue, or Order Work Queue), or via a queue summary page, (Registration Work Queue Summary, Amemdments Work Queue Summary, Issuance Queue Summary, or Order Work Queue Summary).

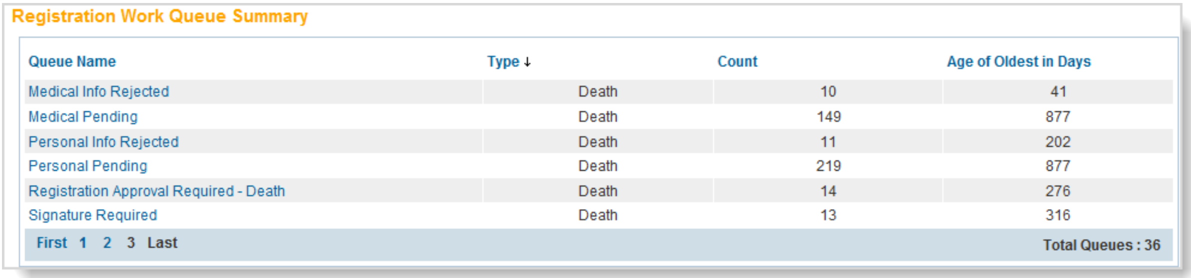
Seletcting a Queue Menu Page

Select *Main Menu* > *Queues* > *Registration Work Queues*. The *Search by Registration Work Queue* menu page will load from which a particular queue can be selected.



Select a Queue Summary Page

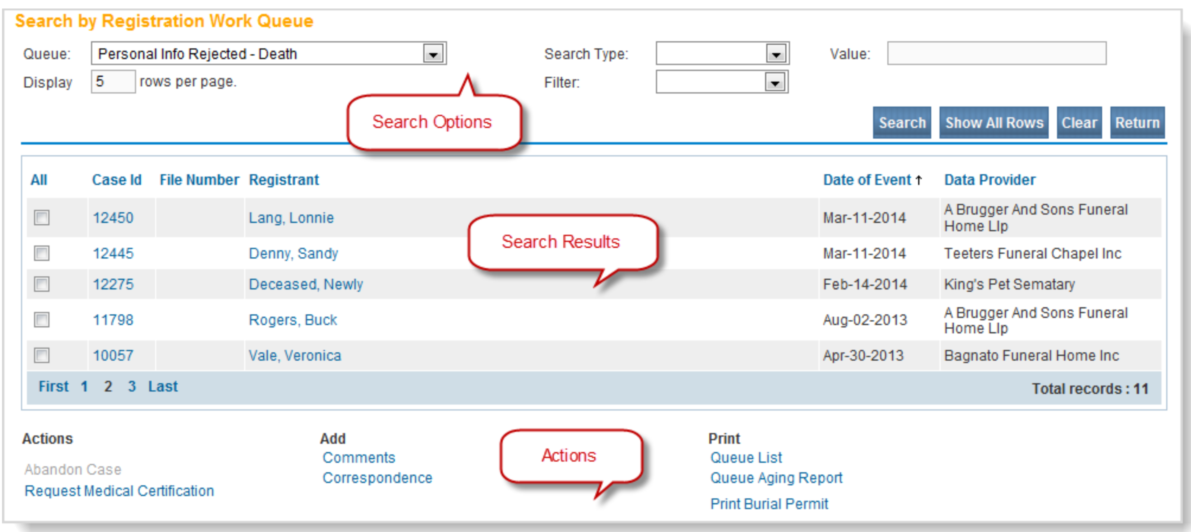
The *Work Queue Summay page* will display a summary of all the queues of the type selected which items appear in.


Registration Work Queue Summary

Queue Name	Type ↓	Count	Age of Oldest in Days
Medical Info Rejected	Death	10	41
Medical Pending	Death	149	877
Personal Info Rejected	Death	11	202
Personal Pending	Death	219	877
Registration Approval Required - Death	Death	14	276
Signature Required	Death	13	316
First 1 2 3 Last			Total Queues : 36

11.1.2 Work Queue Pages

Work queue pages are separated into three sections: Search Options, Search Results and Actions:

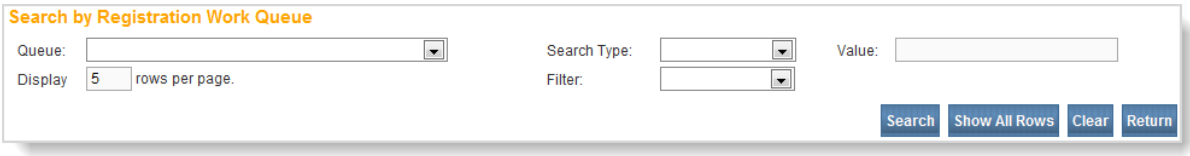


Search Options	Fields for entering search criteria—provides search functionality
Search Results	Data grid listing with hyperlinks—displays all rows within a given queue, or only those rows matching the search criteria
Actions	Hyperlinks—provides functionality for user actions such as accessing the item directly, assigning a case to another queue, certifying, printing, entering comments or attaching correspondence, etc.

11.1.3 Search Options

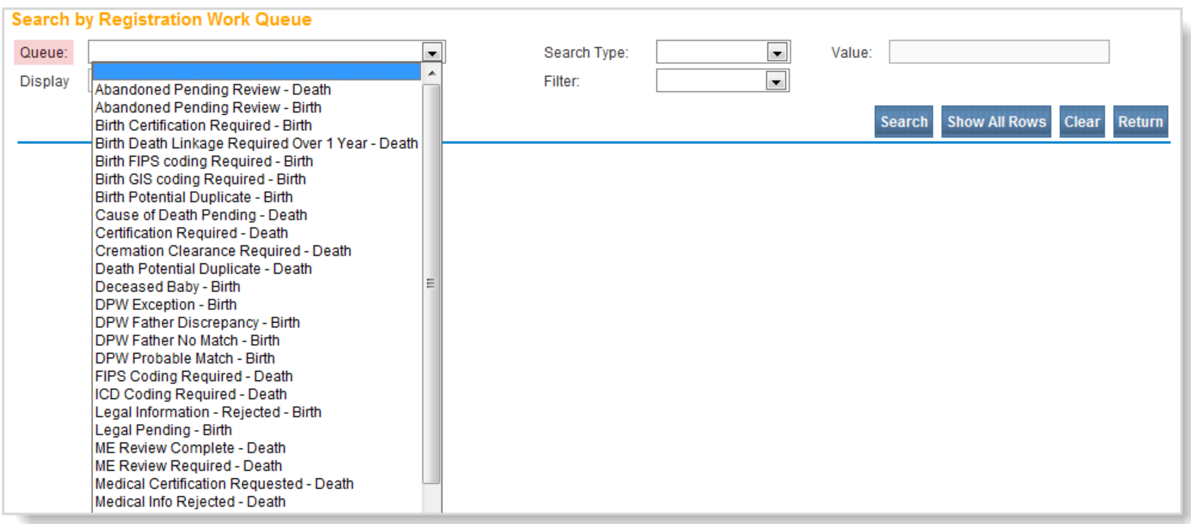
The Work Queue page allows the user to search for specific cases within a queue type.

1. Four search options are provided: *Queue*, *Search Type*, *Value*, and *Filter*.

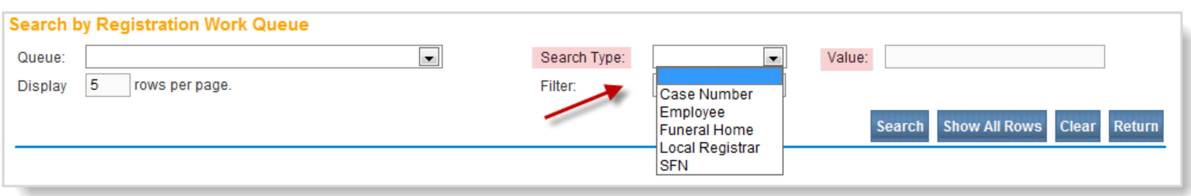


The actual work queues available vary based on user type & security setup.

2. Select a queue name from the *Queue* dropdown.

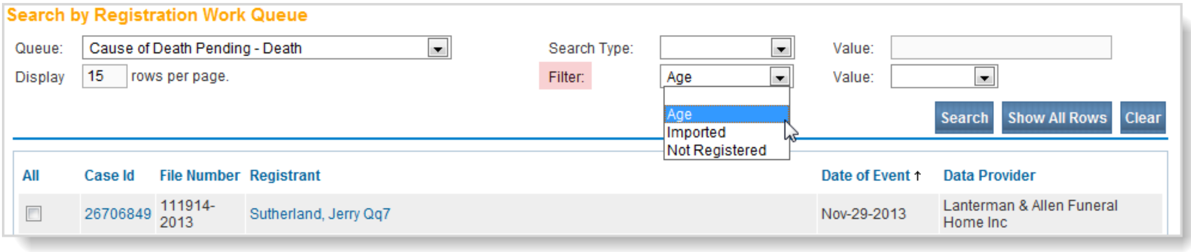


3. A *Search Type* may also be chosen, but only if a value is provided in the *Value* field.

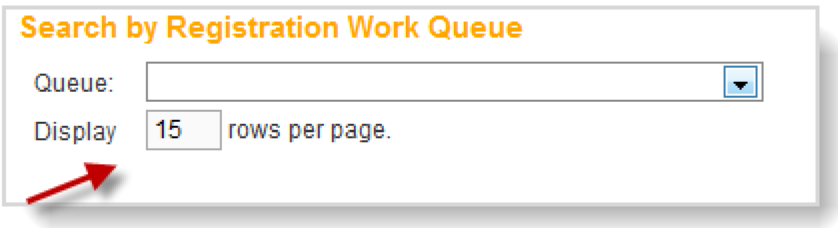


Search criteria entries work together to refine a search. It is possible to use both the *Queue* and *Search Type* search criteria dropdowns.

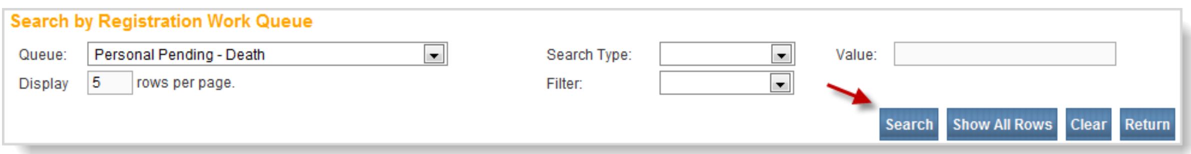
4. Selection of a *Filter* will also help narrow search results. If a *Filter Value* is required, DAVE™ will prompt users to enter one.



Display - Determines the number of rows that will be displayed on the page.



5. After all search criteria is entered, select the *Search* button.



It is possible to view all cases in a specific queue by making a selection from the *Queue* dropdown and NOT making a selection from the *Search Type* and *Value* fields.

Queue – Queues available to the user based on security privileges.

Search Type – The search types include *Case Number*, *Employee*, and *SFN* (State File Number). If a search type is selected from the *Search Type* dropdown, then a value MUST be entered into the *Value* textbox.

(Search Type) Value – Enter the case number, employee name or SFN from the case for which the user is searching. Alphanumeric entries are allowed.

If the *Search Type* selected is **Case Number**, the queue will list only the case that matches the case id entered. Note, a *Case ID* is a unique identifier across all events. Searching by Case ID will always return a single record.

If the *Search Type* selected is **Employee**, the queue will list only those cases where the last name matches the last name of the user who performed the most recent *Action*.

If the *Search Type* selected is **SFN**, the search will return only the case that matches the *SFN* entered.

Filter – The values for the *Filter* dropdown will vary based upon the type of work queue selected. A detailed description of each filter can be found within the specific queue sections of this user guide.

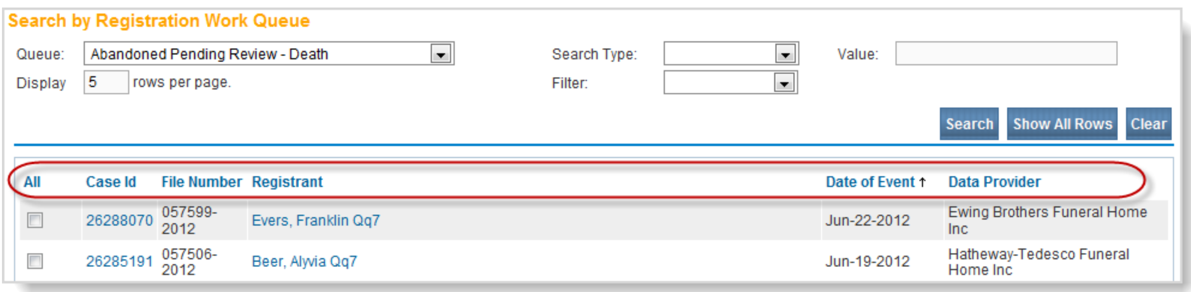
(Filter) Value – A *Filter* value may be required.

The *Filter* dropdown is replaced by an *Age* dropdown on the Order Work Queues search page.

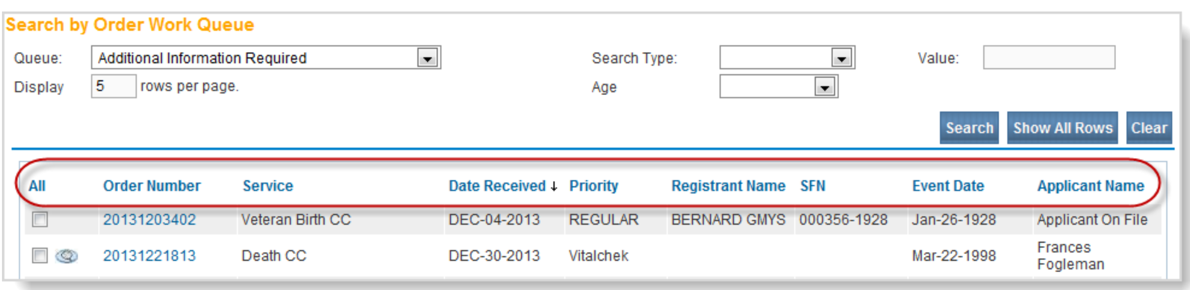
11.1.4 Search Results

Search results always display in a data grid. The results are organized based on the type of queue: *Registration*, *Order*, *Issuance*, or *Amendments*.

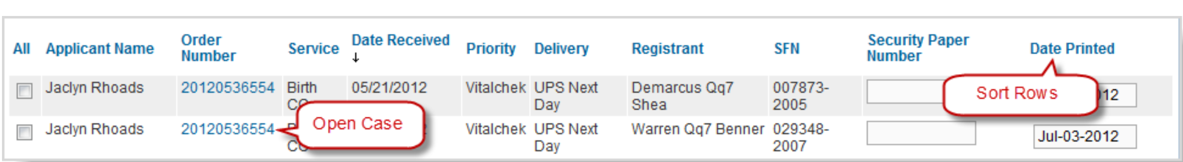
For example, the Registration Work Queue column headers…



…are different from the Order Work Queue column headers.

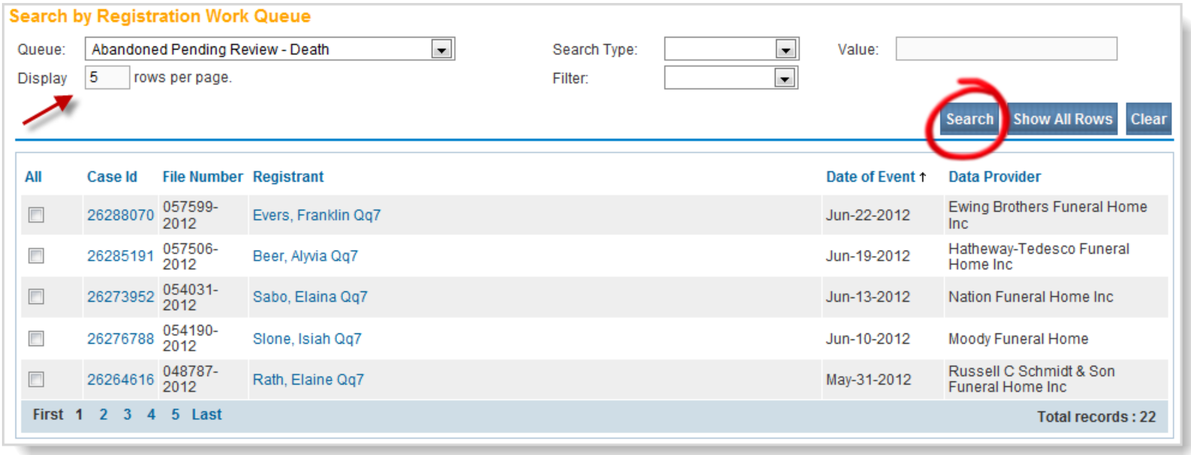


All column headers displayed in blue allow the user to sort and re-sort rows. Select a header to sort the search results by that specific column. To access one of the cases/orders/amendments listed, select any of the blue links within a row.

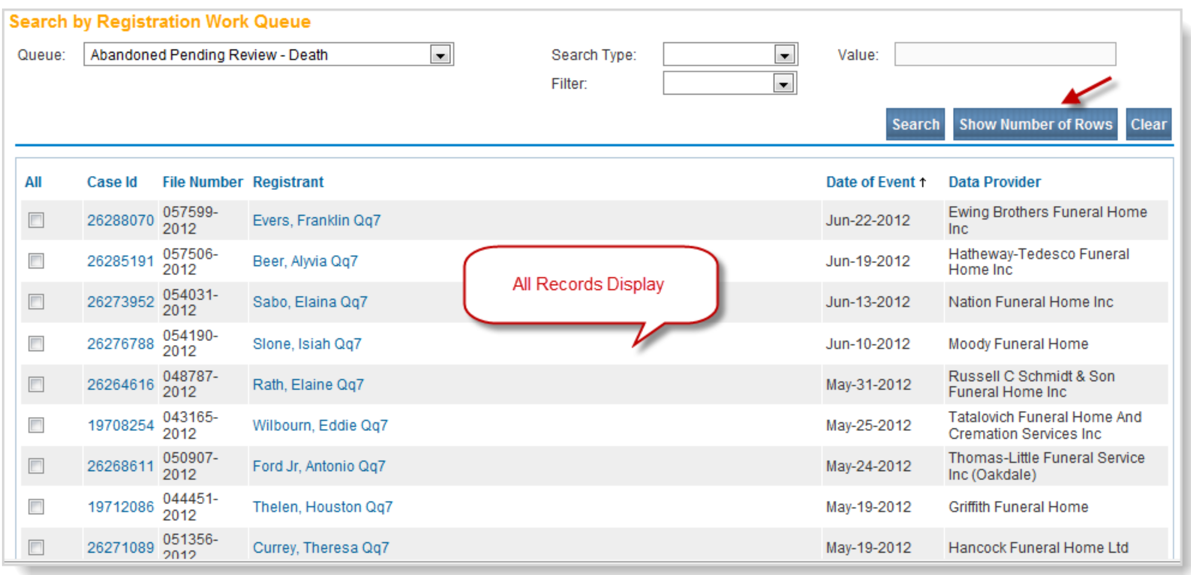


Show All Rows vs. Show Number of Rows

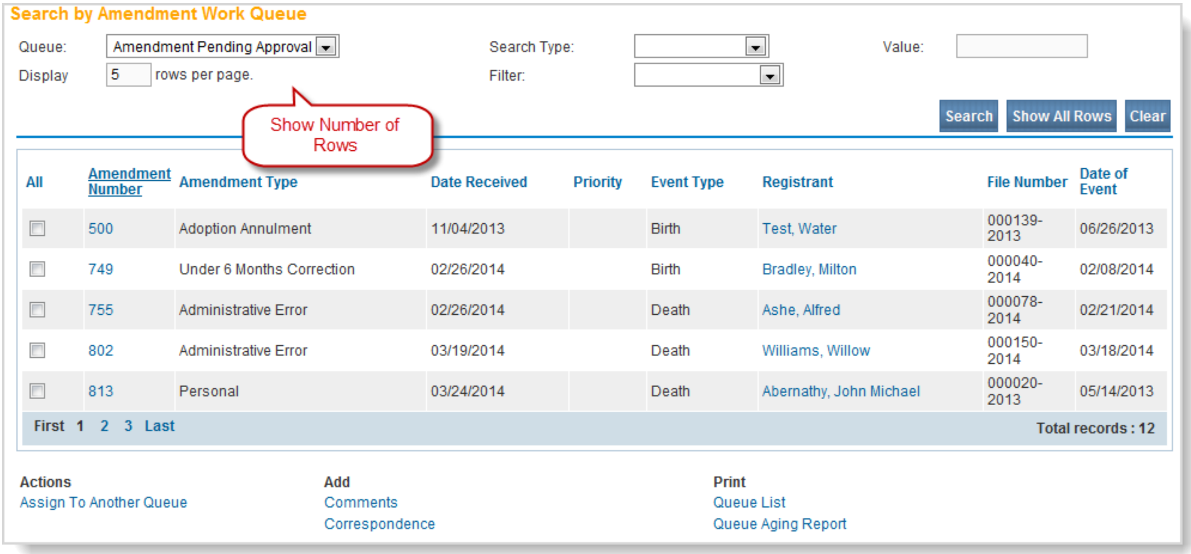
1. Enter a number in the *Display* field, choose *Search*. The number of designated rows displays. To view all rows, choose the *Show All Rows* button.



2. The page will expand to reveal all search results and display the *Show Number of Rows* button.



3. The *Show Number of Rows* button will return the user back to page view where the number of rows is designated in the *Display* field.

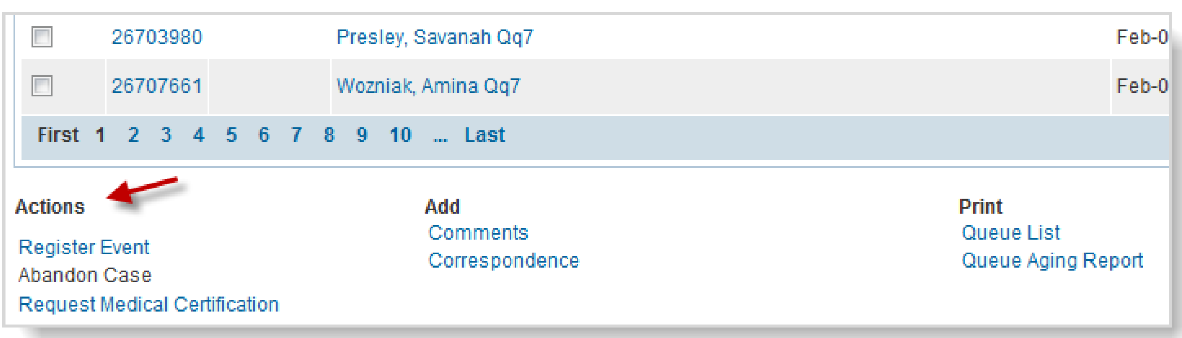


ⓘ Due to database constraints, if more than 2000 matching results are found only the first 2000 results will be displayed.

11.1.5 Actions

Users can perform certain actions on cases directly from the queue search results page. The actions available are based on security privileges and queue type.

The *Actions* links are located at the bottom of the search results page.



The following table describes the functionality of each *Action*.

Register Event	Enabled for registration queues only.	Displays the registration approval page for the row selected.

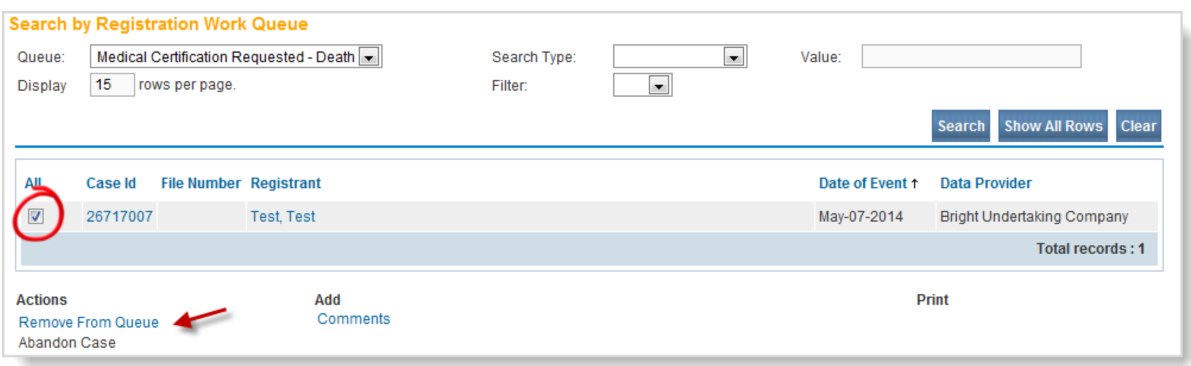
Abandon Case	Enabled for registration queues only.	Changes the registration status for the row(s) selected to “Abandoned”. If a user attempts to assign an “Abandoned” status to a case with a “Registered” status, the following error message will display: “One or more cases are registered. Registered case (Case ID #####) cannot be abandoned.” If more than one case with a registered status is selected, the last line of the message will be repeated for each case with a registered status.
Certify Registration	Enabled for registration queues only.	Displays the Certification Affirmation page for the row selected. Upon selection of the Certify Registration link, if the case does not have a certification required status, then the following error message will be displayed: “The registration you have selected is invalid and cannot be certified. Please correct errors.” If the event has a certification required status, then the Certification Affirmation page will be displayed.
Assign To Another Queue	Enabled for all queue types.	Provides the ability to assign selected row(s) to manual work queue.
Remove from Queue	Enabled for temporary registration work queues only.	Removes the case from the work queue by end-dating the work queue status. The ‘Remove from Queue’ link will **only** be enabled if the queue selected from the ‘Queue’ dropdown is a temporary/manual work queue.

To select a case, place a checkmark in the checkbox ☑ next to the case in the *All* column.

11.1.6 Actions – Remove from Queue

To remove a case from a queue, use the *Remove from Queue* link under the *Actions*.

Select the checkbox ☑ next to the record to be removed and select the *Remove From Queue* link.



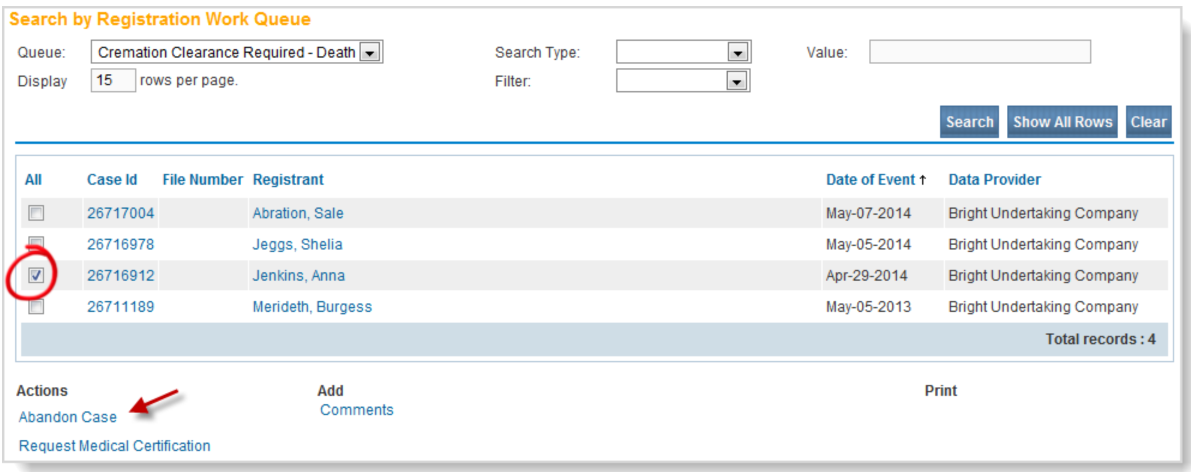
This end dates the status that placed the record in the queue.

11.1.7 Actions – Abandon Case

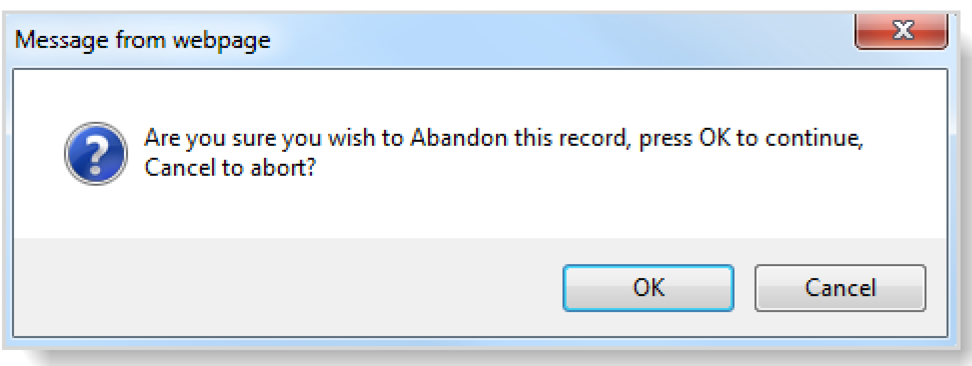
A registration office can use the *Abandon Case* link when appropriate. For example, when a Potential Duplicate error reveals a case is a non-registered duplicate; or when it's determined a case is an orphan — one that was started, but never completed. Additionally, a status of *Abandoned* is assigned by the system when the jurisdictionally-defined time limit has been exceeded for completion of a case.

1. To Abandon a case, select the checkbox ☑ next to the case to be abandoned.

2. Select the *Abandon Case* link.



3. A popup message appears. Select *OK*.



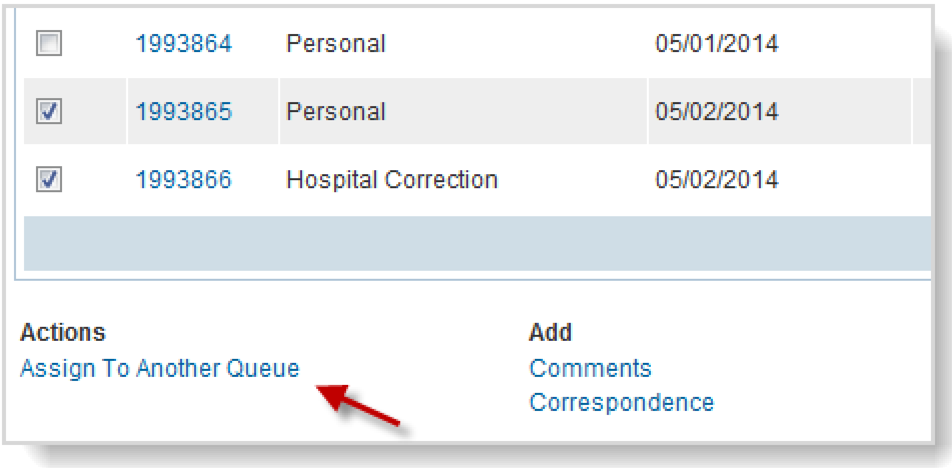
The record is removed from the queue.

No further work may be performed on a case once it has been abandoned.

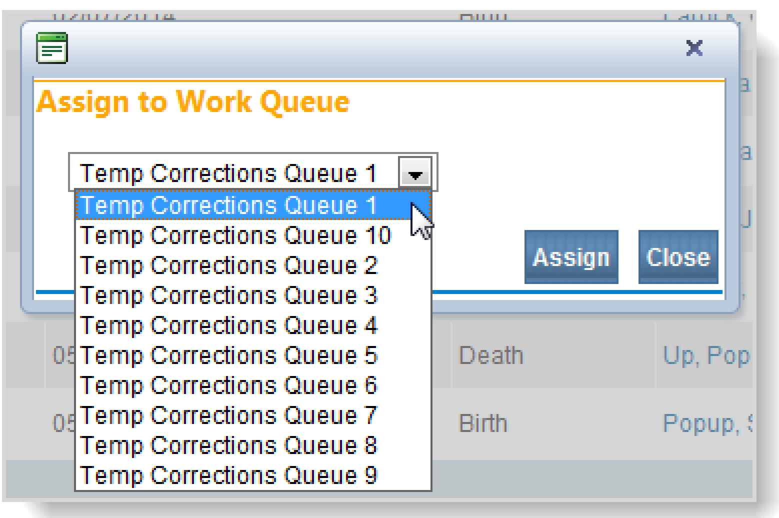
11.1.8 Actions – Assign to Another Queue

The *Assign To Another Queue* link allows users to assign cases from a central queue to smaller employee-specific queues in order to distribute the workload.

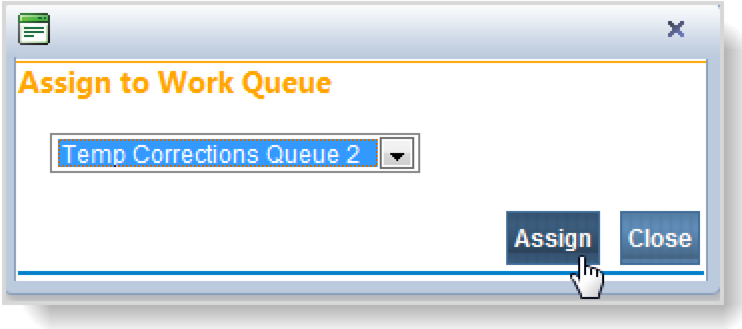
1. To move one or more cases from one queue to another, select the checkbox(es) ☑ next to the case(s) to be re-assigned and select the *Assign To Another Queue* link.



2. A dropdown of available queues appears. The list displayed will be filtered based on the type of originating queue (registration, order, or amendment) and the user's security privileges. The list will include only those queues which have been configured as "Manual" in the Table Maintenance module.



3. Select the desired manual work queue and select the *Assign* button to move the case to the new queue.



If the *Assign* button is disabled, a case cannot be moved to the selected queue.

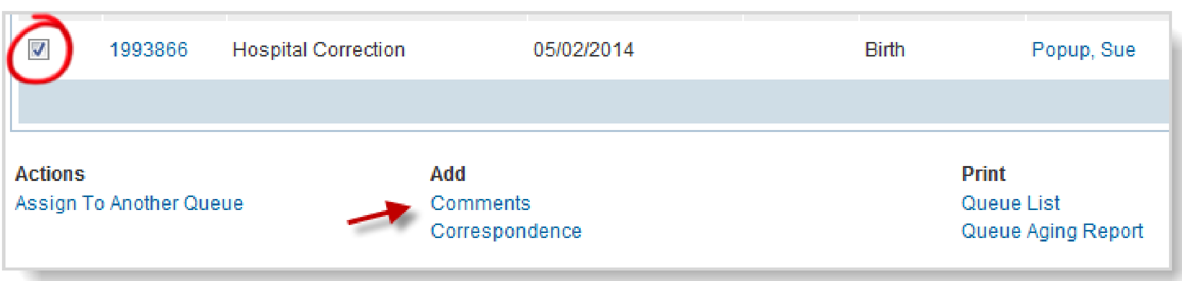
After selecting a new queue from the dropdown:

- The new work queue assign status will update/replace the original work queue status.
- The work queue page refreshes and the new queue to which the case was assigned displays.

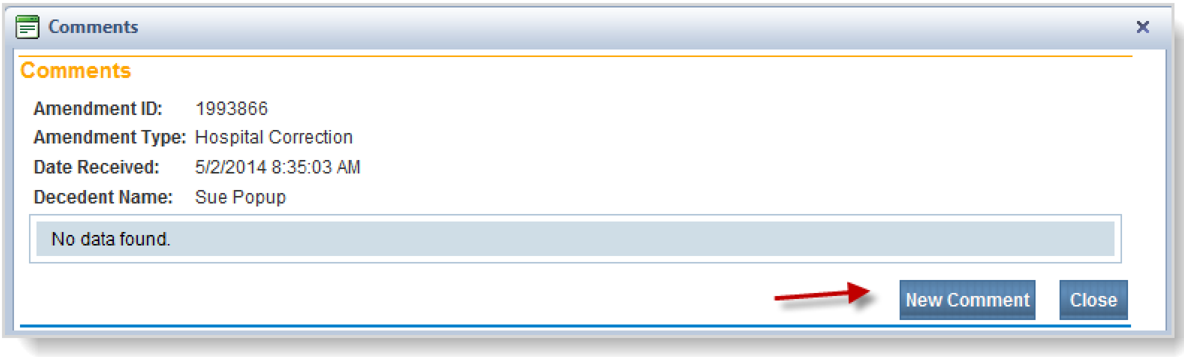
11.1.9 Add – Comments

DAVE™ provides the ability to view, create, or update comments on a case from within a queue. Comments are messages associated with a particular record such as reminder notes concerning special conditions.

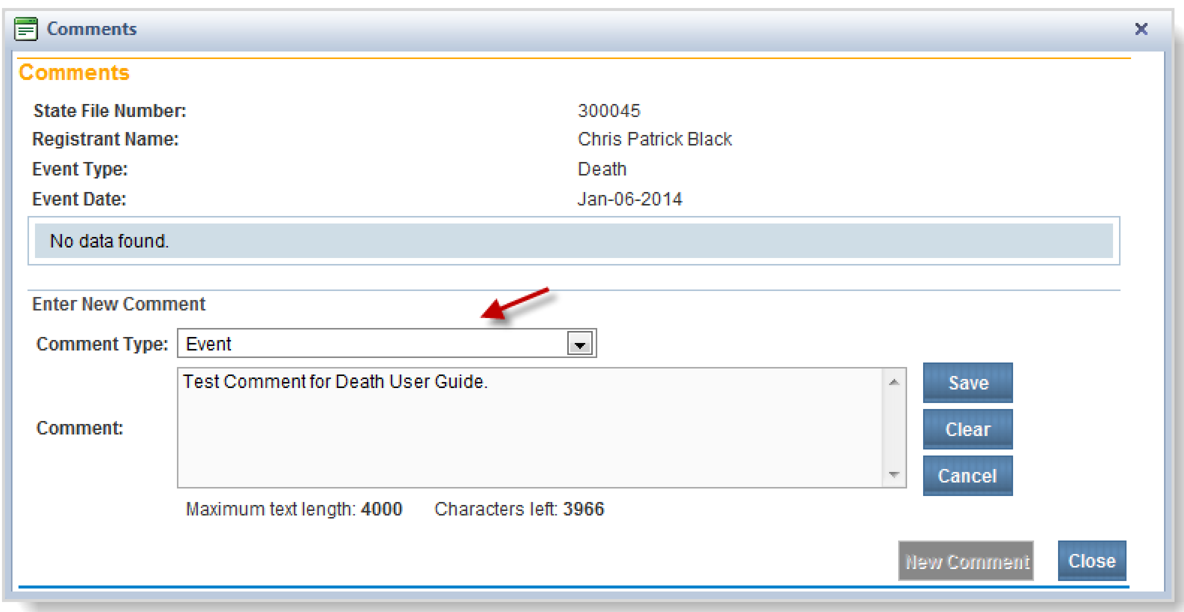
1. Select a record and choose the *Comments* link.



2. The Comments popup window is displayed. Select the *New Comment* button to add a comment.



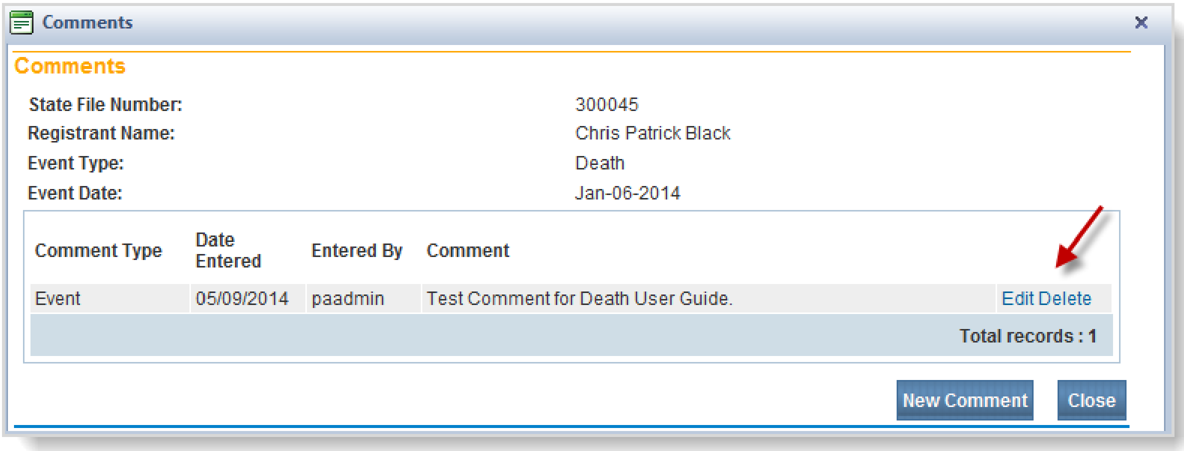
3. Select a value from the *Comment Type* dropdown. Every comment must be associated with a type.



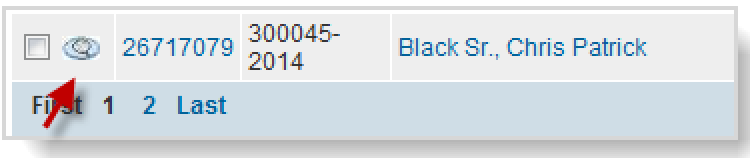
4. Enter text into the *Comment* field. Comments can be up to 4000 characters. A counter at the bottom of the page provides a real time character count. Keep in mind spaces count as characters.

5. Once a comment has been entered, select the *Save* button to save the comment, *Clear* to erase the text, or *Cancel* to close the Comments dialog without saving the comment.

6. Once the comment has been saved, it appears in the comments list. If the user has the appropriate security, the *Edit* and *Delete* links will be available. Select *Edit* or *Delete* to change or remove the comment, *New Comment* to enter another comment, or *Close* to close and return to the queue search results page.



The Comments icon now appears adjacent to the case in the *All* column to indicate there is a comment attached to the record.

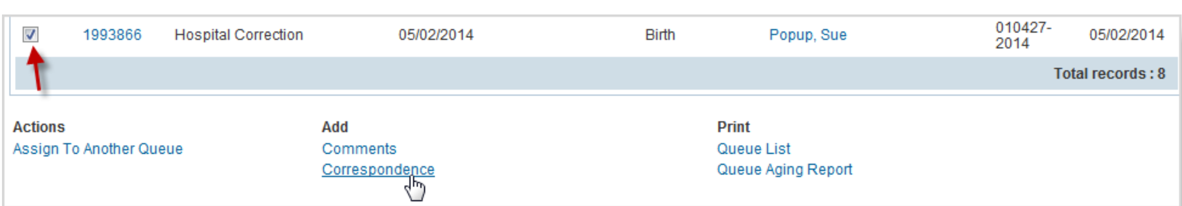


11.1.10 Add – Correspondence

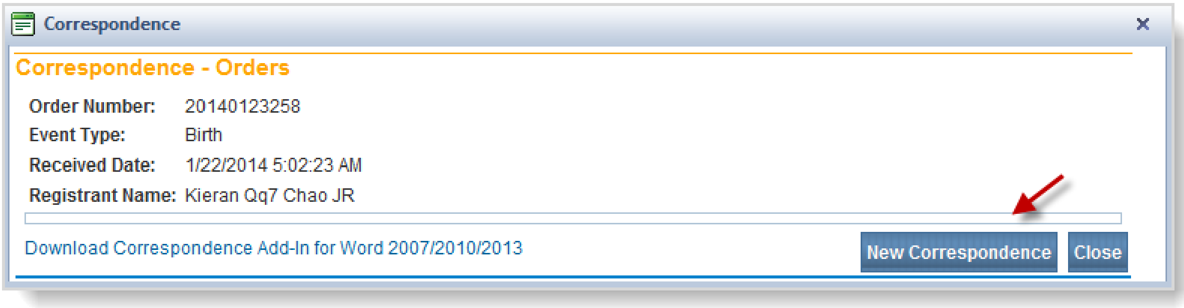
DAVE™ provides the ability to view, create, or update case correspondence from within a queue. The *Correspondence* link provides access to MS Word templates within DAVE™ that can be used to produce letters and other forms of communication for a case when needed.

Templates are created using MS Word and may be used for amendments, rejection letters, requesting corrections to a record, for special statuses, and other correspondence purposes.

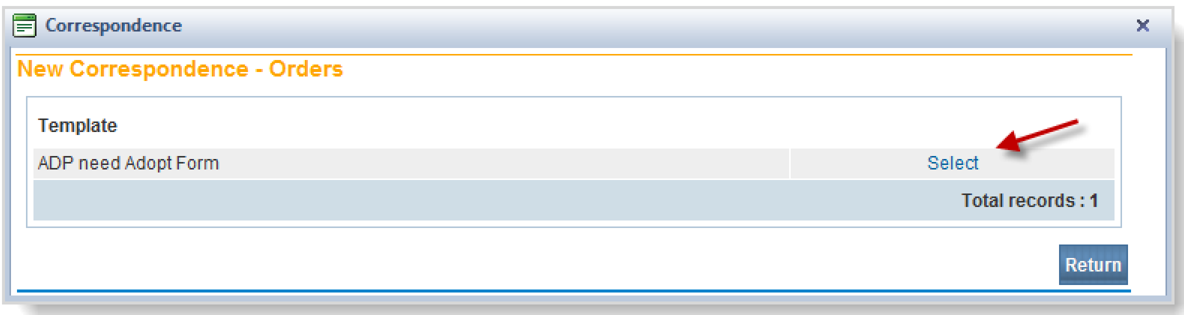
1. Place a checkmark next to the desired record and select the *Correspondence* link



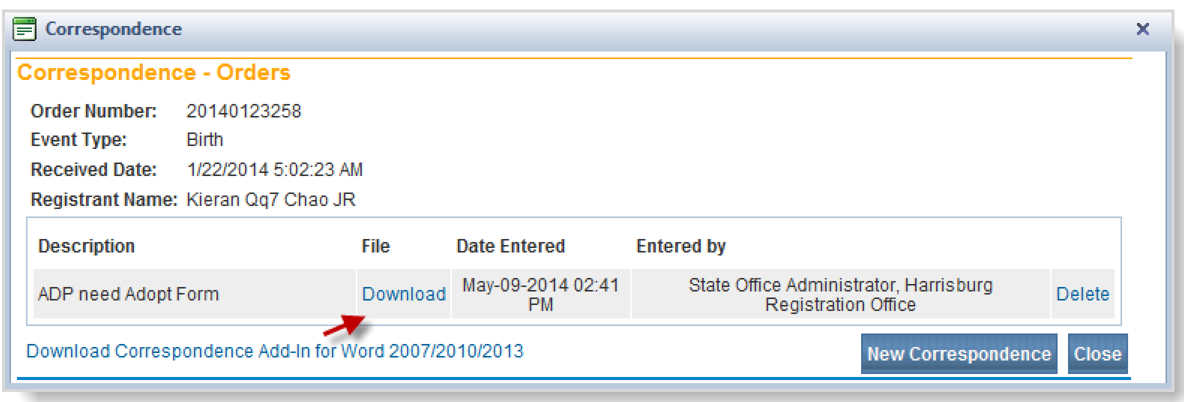
2. The Correspondence page displays. Select the *New Correspondence* button to access the correspondence templates.



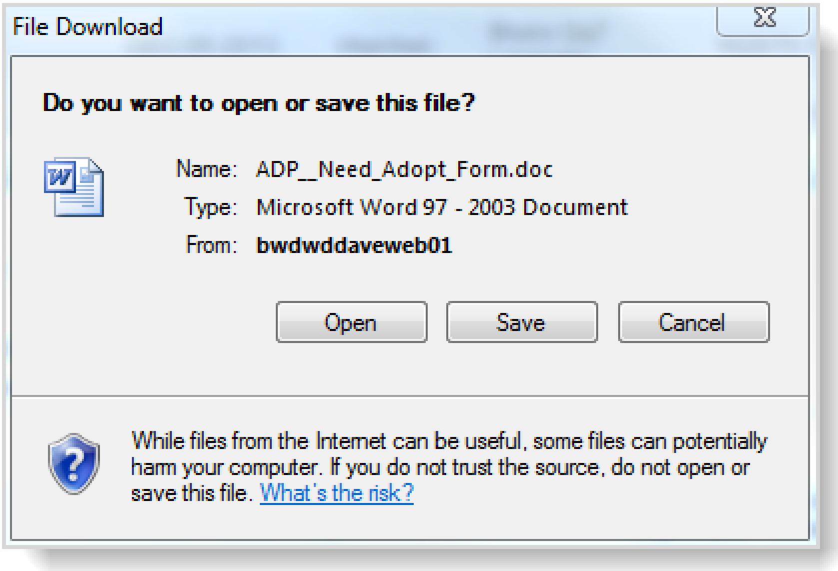
3. Templates that have been saved and made available for use appear in the table. Select the *Select* link adjacent to the desired template.



4. The Correspondence dialog expands to show template details. Select the *Download* link in the *File* column.



5. In the File Download dialogue box, select *Open* to access the template. MS Word opens the template file. Enter content for the correspondence and select *Save*.

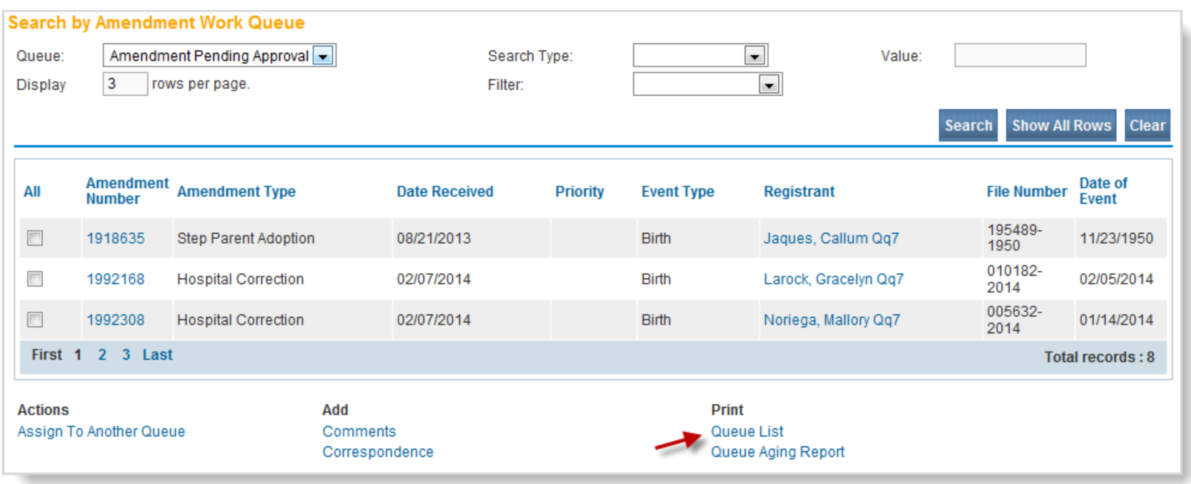


An electronic version of every correspondence is saved and linked to the specific Death Registration to which it was attached.

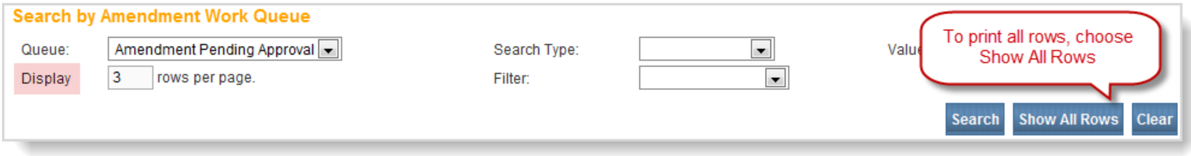
11.1.11 Print – Queue List

The Print menu at the bottom of any Queue page will always have at least one option: *Queue List*.

1. Select *Queue List* to print the page displayed.



2. The printout only includes the number of records selected in the *Display* field. If a listing of all records in the queue is desired, select the *Show All Rows* button.

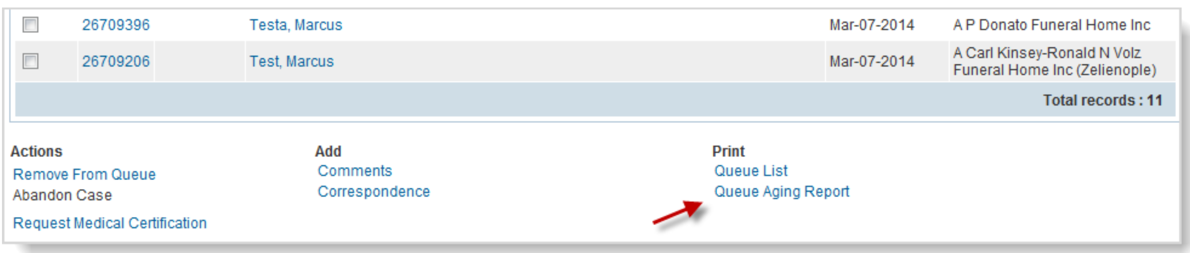


3. The Print dialog box appears. Select the desired printer and *Print*.

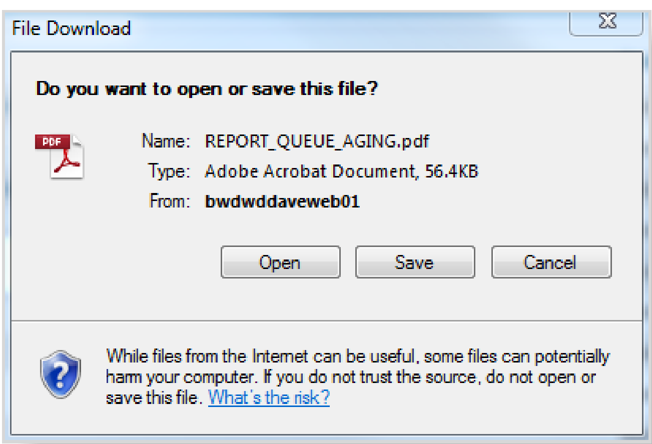
11.1.12 Queue Aging Report

The *Queue Aging Report* link produces a list of cases sorted by how many days they have been in the queue.

1. Select the *Queue Aging Report* link under the Print menu.



2. The File Download dialog appears. Select *Open* to view the .pdf, *Save* to save the file locally, or *Cancel* to return to the Queue page



3. The following is a sample of the .pdf output. The columns to the right contain “x” marks denoting the number of days a record has been in the queue.

ARIZONA DEPARTMENT OF HEALTH SERVICES LICENSING

Queue Aging
(Registration Event Queues)

Report Parameters
Queue Name Cause of Death Pending
Office Office Of Vital Records

The State of Arizona
Department of Health Services
Bureau of Vital Records
P.O. Box 6018
Phoenix, AZ 85005

OFFICE: Office Of Vital Records
USER: superuser

Cause of Death Pending

Date of Event	SFN	Registrant	Age 1-14	15-30	31-45	> 45
10/03/2016		Smith, Jane				X
10/04/2016		Andrews, Wendi Marie				X
10/02/2016		Test, Certifier-page	X			
10/07/2016	2016000010	Carson, Graham Carter				X
10/11/2016		Rabbit, James				X
10/11/2016		Tyler, Steven				X
10/24/2016		New, Test				X

12. Accounting

The Accounting pages within DAVE™ allow users with appropriate security privileges to close cashier transactions, reconcile transactions, and print reports. The system allows for reconciling payment transactions by user and office, and generating accounting-related reports, such as revenue reports.

Vital Records agencies typically have one-to-many cashiers who process orders for a specific time period (daily or per shift). At the end of this time period, all non-credit card payments are counted and reconciled. The following steps outline the process a cashier would go through to cashout and reconcile their transactions:

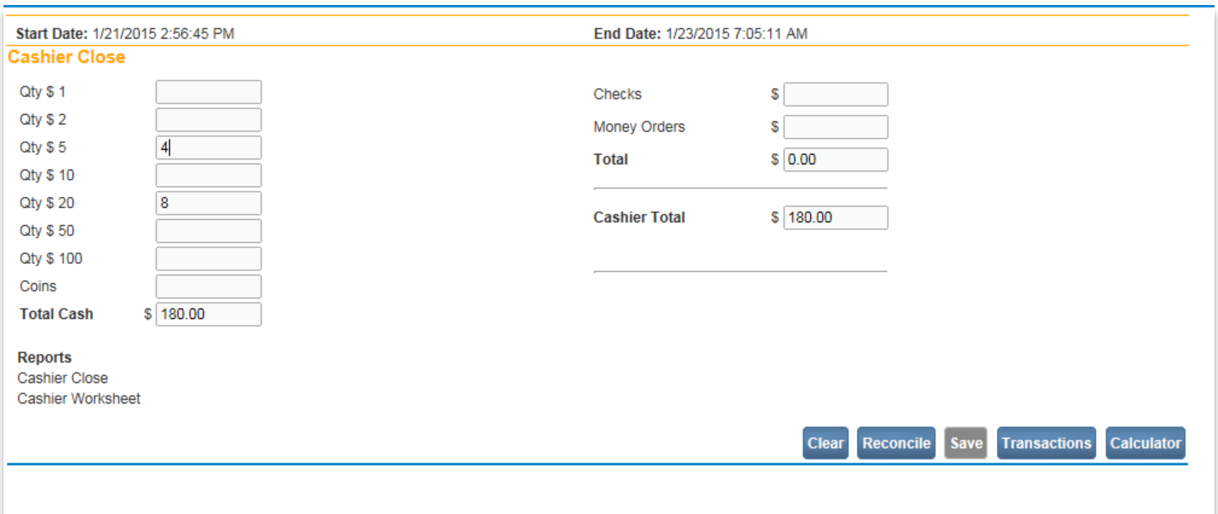
1	**The cashier totals each type of payment collected (cash, check, money order, etc.).**
2	**After each payment type is manually counted and totaled, it is compared to the DAVE™ application total for the payments the cashier entered.**
3	**If the two totals differ, the cashier must try to reconcile the difference.**
4	**In some cases, a cashier may be unable to reconcile the difference.**
5	**The cashier has the ability to close transactions with a discrepancy.**

The DAVE™ application provides an **Accounting** menu used to access cashout and reconciliation functions, **Cashier Close** and **Cashier Reconciliation**, two specific search options, **Invoice Search** and **Refund Search**, and a separate menu option that is used exclusively for closing out credit card transactions, **VitalChek Close**.

12.1.1 Cashier Close

DAVE™ includes a **Cashier Close** module designed to help registration staff perform a daily “cashout” of the payments processed, and balance a cash drawer. The **Cashier Close** option is used to process payments for customer orders. The process of cashing out is performed daily. It begins with the cashier entering the amount of money received into the **Cashier Close** page.

From the **Main Menu** select **Accounting -> Cashier Close**. This opens the **Cashier Close** page.



The top of the **Cashier Close** page displays the **Start Date** and **End Date** of the transactions to be included in the cashout. The **Start Date** is system-filled with date and time of the last transaction of the current user (user that is currently logged into DAVE™) at the time the report was last run. The **End Date** is system-filled with the current date and time. These are the range of dates/times that the transactions were performed that will be included in the **Cashier Close** report.

On the left of the page are the **Qty $** accounting controls for entering cash amounts, and the **Total Cash** control which increments the sum as all cash entries are made. The quantity of each denomination of currency listed and the total monetary amount of coins collected get entered in these accounting controls.

The accounting controls allow numeric entries and commas only.

Qty $	Accounting controls—down the left side of the page which allow entry of the ‘quantity’ of each type of bill collected
Coins	Accounting control—allows entry of the total amount of coinage collected
Total Cash	All the amounts entered in the **Qty $** and **Coins** controls above are totaled here
Cashier Total	Amount accumulated in the **Total Cash** control is copied here.

In the illustration, the cashier collected four $5 bill and eight $20 bills. The bill amounts are entered in their respective **Qty $** accounting controls. As the entries are made, the **Total Cash** amount is incremented accordingly [**$180.00**]. This amount is then carried over to the **Cashier Total**.

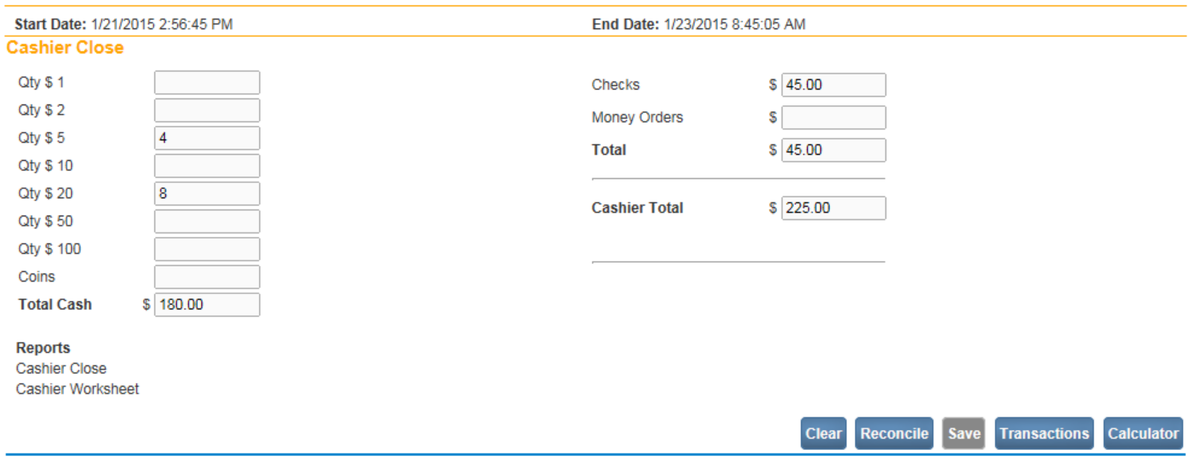
At the bottom of the page are five navigation buttons: **Clear, Reconcile, Save, Transactions** and **Calculator**.

The Save button is disabled until a cashier does a cash out/reconciliation.

Clear	Clears the values entered on the Cashier Close page and resets the page to zeros.
Reconcile	Settles the cashier's transactions. When the "Reconcile" button is selected, the application compares the "Cashier Total" (sum of all values entered on the Cashier Close page) with the total of all the payment transactions entered by the cashier between the date and time of last close and the current date and time. If the two values do not match, the application displays an onscreen message that there are discrepancies. If the two values match, the application displays an onscreen message that there are no discrepancies.
Save	Stores the cashier's entries, and closes the transactions. The cashier is indicating he/she agrees with the application (no discrepancy) or that he/she is unable to reconcile a discrepancy. Once the values are saved all controls are disabled.
Transactions	Displays the Cashier Transactions page listing all transactions for the current cash out.
Calculator	Provides standard calculator functionality.

If there are no cashouts for a cashier to perform, DAVE™ displays a message below the **Cashier Total** control.

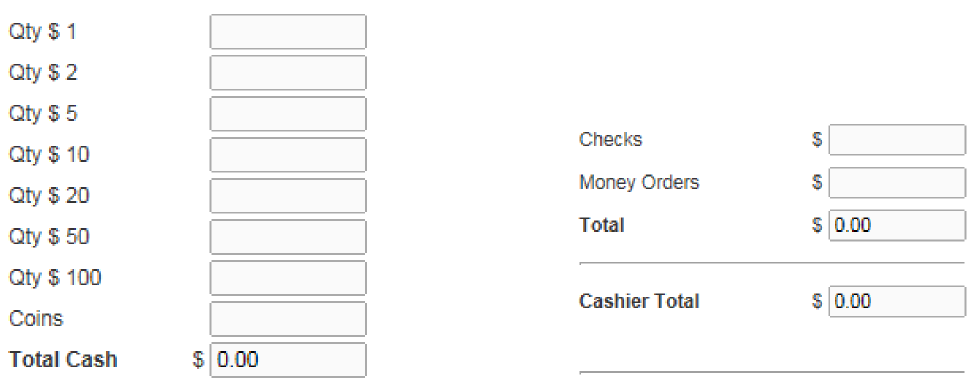
In another illustration, there is one check that equals $45. "45" is entered into the Checks control The DAVE™ application adds the necessary zeros (i.e., "45.00").



As the amounts, are entered, the **Total** control on the right is incremented accordingly and the **Cashier Total** will be the summation of both the **Total Cash** control and the **Total** (checks and money orders) control. It is not necessary to enter a zero if no quantity of a denomination exists.

The *Cashier Close* option does not include credit card payments. Credit card payments are reconciled using the VitalChek Close option. See section 12.1 VitalChek Close

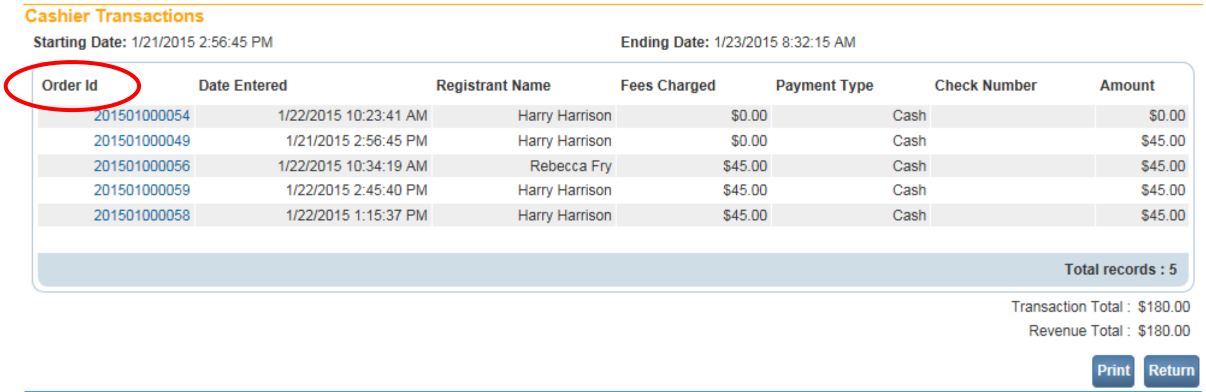
If a cashier does not have security privileges to enter all payment types (i.e., cash, money order, checks, etc.), the **Qty $** accounting controls for cash entry and the **Money Orders** control are "restricted" and show as disabled, but cashier has access to enter data in the **Checks** control.



12.1.2 Closing a Check Payment Order

Check payments are closed differently than cash payment orders, but the two must eventually be combined for each cashier. From the **Cashier Close** page, click the **Transactions** button.

The Cashier Transactions page displays a data grid listing containing the **Order Id** numbers for orders that have been entered into the DAVE™ application. Click the **Return** button to go back to the **Cashier Close** page.


Cashier Transactions

Starting Date: 1/21/2015 2:56:45 PM Ending Date: 1/23/2015 8:32:15 AM

Order Id	Date Entered	Registrant Name	Fees Charged	Payment Type	Check Number	Amount
201501000054	1/22/2015 10:23:41 AM	Harry Harrison	$0.00	Cash		$0.00
201501000049	1/21/2015 2:56:45 PM	Harry Harrison	$0.00	Cash		$45.00
201501000056	1/22/2015 10:34:19 AM	Rebecca Fry	$45.00	Cash		$45.00
201501000059	1/22/2015 2:45:40 PM	Harry Harrison	$45.00	Cash		$45.00
201501000058	1/22/2015 1:15:37 PM	Harry Harrison	$45.00	Cash		$45.00

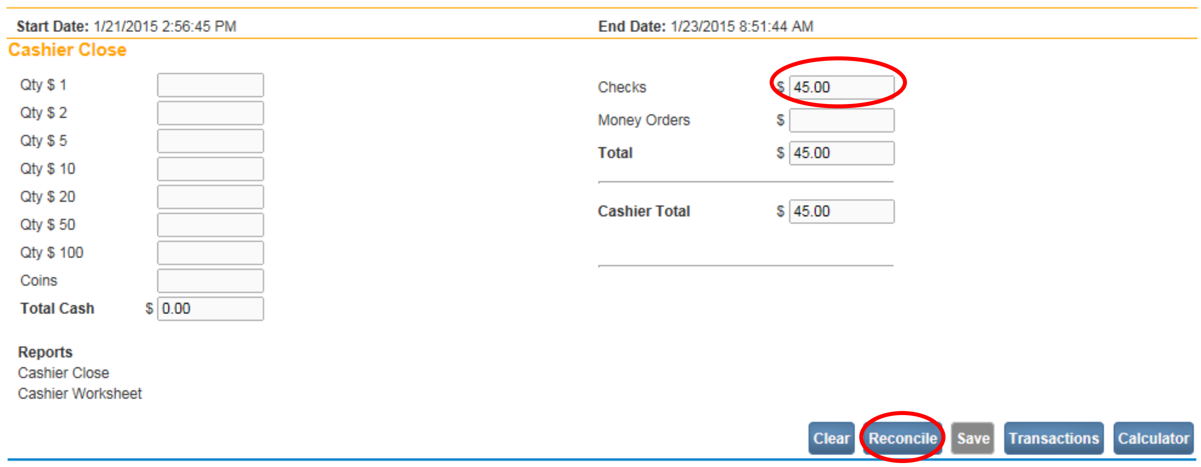
Total records : 5

Transaction Total : $180.00

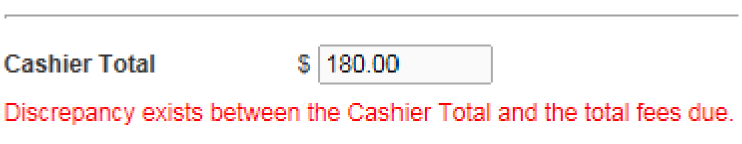
Revenue Total : $180.00

Print Return

Enter an amount ($45.00) in the **Checks** accounting control. Click the **Reconcile** button.

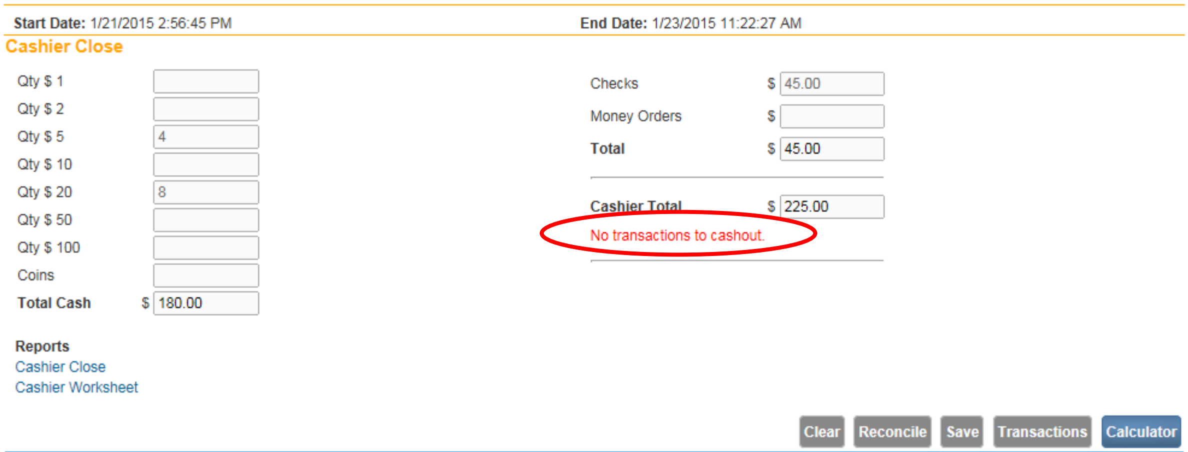


Because there was also a cash payment associated with this **Order Id** number it must entered as well. The application issues an error message on the page to alert that there is a discrepancy.



Enter all cash payments in the appropriate **Qty $** accounting control; a $10.00 amount appears in the **Total Cash** control and gets added to the check payment and totaled as $20.00 in the **Cashier Total** control. Click **Save**.

If the cashout was successful, an application-generated onscreen message appears in red showing that there are now no transactions to cashout.



12.2 Cashier Reconciliation

After a cashier closes daily transactions, a supervisor or other authorized staff person verifies the cashier's totals. The supervisor repeats the process followed by the cashier and if a discrepancy exists he/she will try to resolve it by comparing the application total payments and cashier total payments to the application total for amount due (the total fees charged for the services associated with the payments being counted).

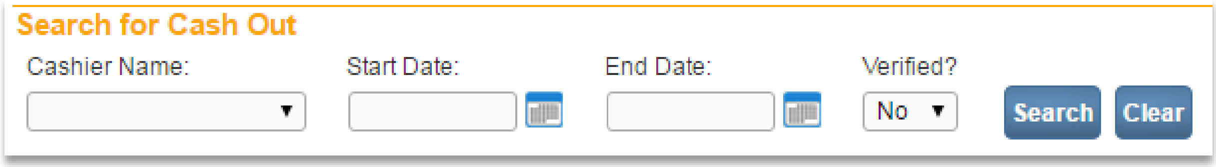
If an error is discovered in the payment transactions entered by the cashier, the supervisor must correct the order(s). If the supervisor is unable to resolve the discrepancy (most often the discrepancy happens in providing change to a customer), the supervisor closes the transactions and adds a comment describing the amount and reason for the discrepancy.

Use of comments is not mandatory, but can be very helpful in resolving discrepancies and is highly recommended.

Often there is a legitimate reason for the amount due to differ from the total payments. For example, mail orders are often received with insufficient payment. In this case, when the order is entered the amount due may be $15.00 but the payment entered may only be $10.00. The amount received ($10.00) is entered and closed the day of receipt. A correspondence is then sent to the customer informing them that their order cannot be processed until additional payment is received. The remaining balance is entered upon receipt.

Once a user has cashed out, a supervisor must post the transactions and adjust any discrepancies that may exist. The feature that accommodates this process in DAVE™ is known as **Cashier Reconciliation** and it helps ensure transactions are reconciled accurately. It is essential that a supervisor reconciles cashouts on a regular, scheduled basis. The frequency that cashouts are performed is based upon jurisdictional requirements and business processes, i.e., some state do three times daily, others at least once daily.

From the **Main Menu** select: **Accounting -> Cashier Reconciliation**. The **Search for Cashout** page is displayed.



To search for transactions to reconcile for a specific cashier, select the **Cashier Name** from the dropdown.

Only cashiers with outstanding cash outs are displayed in the list.

Options for populating the controls on this page in order to narrow a search are as follows: Setting a **Start Date** and **End Date** will return all transactions processed within those dates.

The **Verified?** dropdown contains three options:

All	Displays all cash outs, regardless of status
No	Returns a listing of cash out transactions that have not been reconciled or verified
Yes	Allows review of previously reconciled transactions

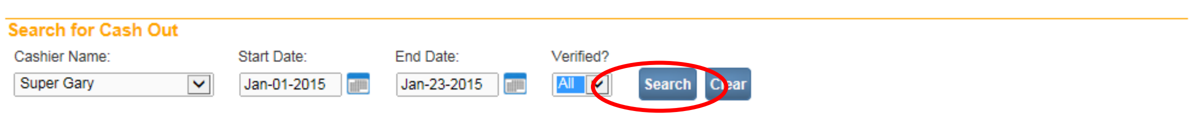
Although most agencies do not allow cashiers to process additional orders until the previous batch of transactions have been verified by a supervisor, some agencies require cashiers to begin processing orders immediately upon "close" of the previous batch. As a result, the application must provide the ability to link a cashier's transactions by cashout time period so that the supervisor's reconciliation will include the same transactions as the cashiers, even if new transactions have been entered since the time the cashier closed.

When a cashier takes the first payment, DAVE™ creates a Cash Out ID and associates all payments with that ID until the cashier closes out the daily transactions.

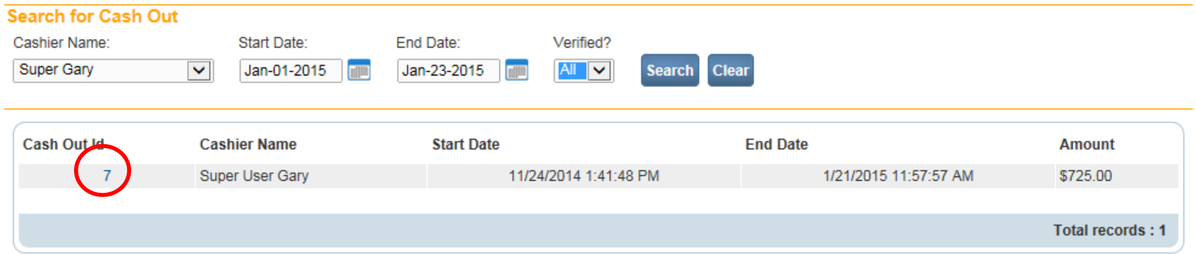
If the cashier deletes the first payment, the cash out ID will be deleted as well.

On the **Search for Cashout** page click **Clear** to clear all entries and begin again or **Search** to find cashouts that match the selected criteria. In this illustration, the search criteria is for **All** cashouts processed by the cashier or **State Office Administrator**, between **Apr-13-2010** and **Jul-19-2010**.

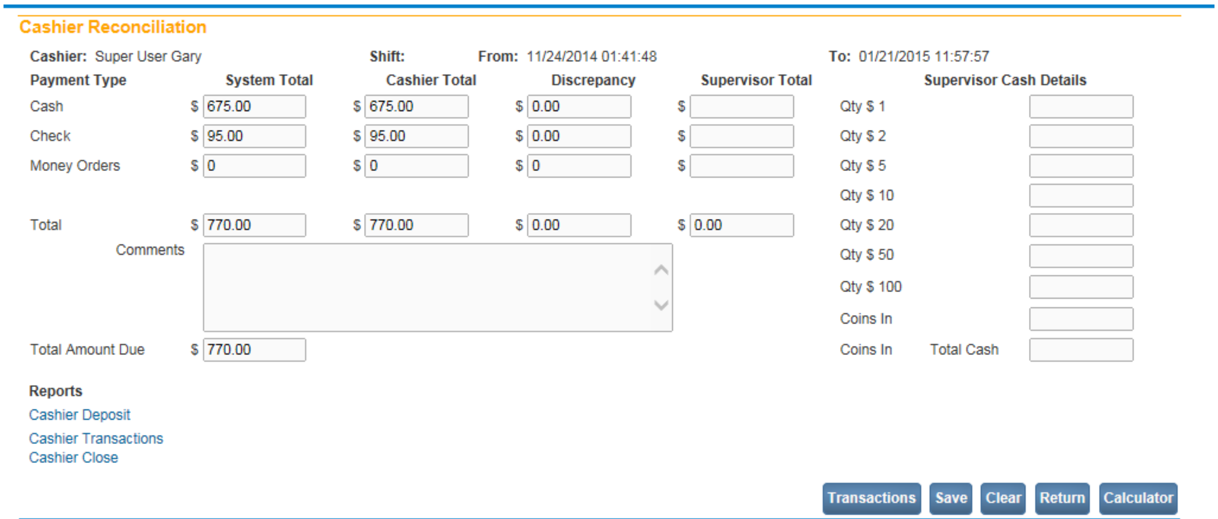
Example scenario: Select **State Office Administrator** from the **Cashier Name** dropdown and **Yes** from the **Verified?** dropdown, then click the **Search** button.



The page expands with a data grid listing. From the data grid listing select the number link in the **Cashout Id** column that corresponds to the transaction that needs to be reconciled.



The **Cashier Reconciliation** page appears.

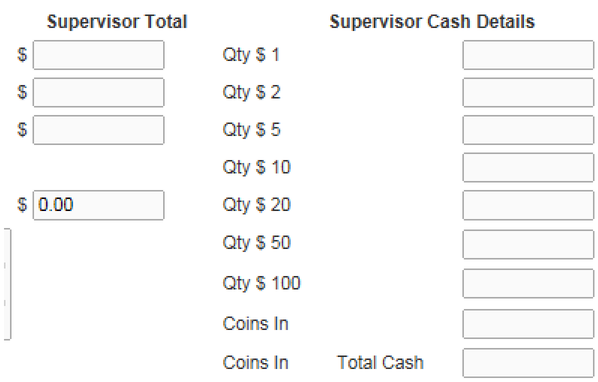


The following descriptions explain the controls used on the **Cashier Reconciliation** page.

Cashier	Displays the name of the Cashier associated with this particular cash out.
From: and To	Displays the date range for which transactions were retrieved.
Payment Type	Indicates the type of payment for which entries will be made in the columns to the right.
System Total	Displays the amount of cash (including coins) that the cashier should have based on the number and amount of transactions retrieved.
Cashier Total	Displays the totals entered by the Cashier on the Cashier Close page.
Discrepancy	Displays the difference between the System Total and the Cashier Total. This Cash out contains a discrepancy of -$30.00.
Supervisor Total	Displays the amount of funds as counted by the cashier's supervisor.
Supervisor Cash Details	As the supervisor counts the Cashiers funds, the number of each denomination of bill collected is entered in the appropriate control.
Comments	Allows Supervisor to explain any discrepancies found.

Reports	Includes a number of reports that system user can print.
Total Amount Due	Displays the total fees due for the orders associated with the payment transactions.

Under **Supervisor Cash Details**, begin entering the numbers of denominations of bills collected by the cashier. In this example the cashier collected two one dollar bills so the supervisor entered 2 in the **Qty $1** text entry control. The totals are reflected in the **Total Cash** control.



As entries are made in the **Supervisor Cash Details** column a running total is also kept in the **Supervisor Total** column.

In the **Comments** text entry control comments can be added to explain any discrepancies between the **System Total, Cashier Total** and **Supervisor Total**, or general notes about anything. Comments from a supervisor can be used to confirm and explain any discrepancies.

Use of comments is not mandatory, but can be very helpful in resolving discrepancies and is highly recommended.

The buttons at the bottom of the **Cashier Reconciliation** page function as follows:

Select the **Transactions** button to view a listing of all transactions associated with this cashout.

Cashier Transactions

Starting Date: 11/25/2014 2:58:00 PM **Ending Date:** 1/23/2015 9:33:19 AM

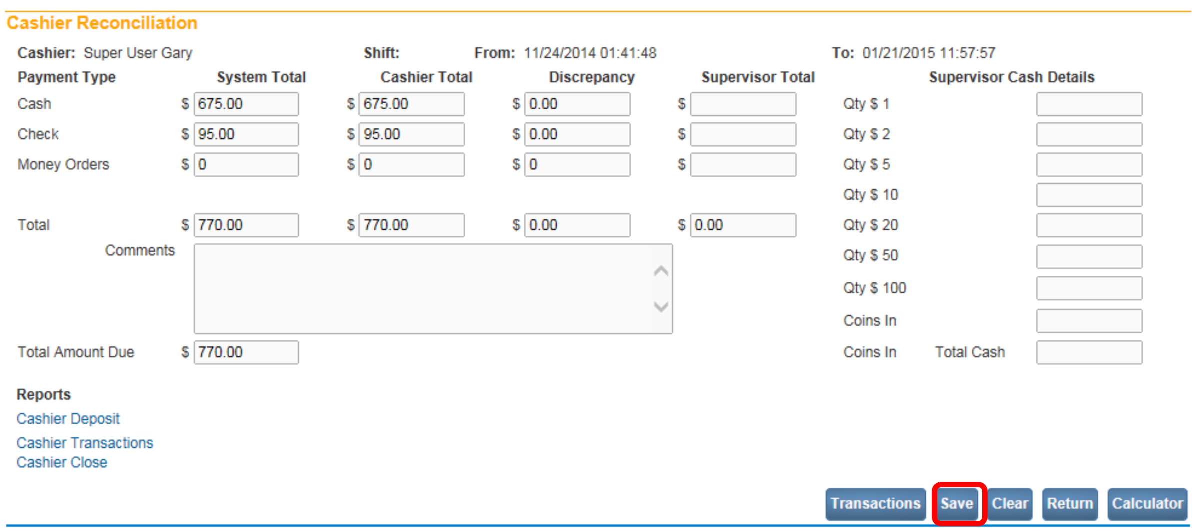
Order Id	Date Entered	Registrant Name	Fees Charged	Payment Type	Check Number	Amount
201501000029	1/16/2015 7:22:55 AM	O. P. Zero-Zero-Forty-One	$45.00	Check	12345	$50.00
201501000051	1/21/2015 11:39:51 AM	Harry Harrison	$45.00	Check	2870	$0.00
201501000034	1/16/2015 8:15:56 AM	George Vaughn	$45.00	Cash		$45.00
201501000033	1/16/2015 8:04:59 AM	George Vaughn	$45.00	Cash		$45.00
201501000024	1/9/2015 8:05:10 AM	Harry Harrison	$45.00	Cash		$45.00
201411000099	11/25/2014 2:58:00 PM	John Smith	$45.00	Cash		$45.00
201412000001	12/4/2014 1:11:06 PM	Dallas Cowboys	$45.00	Cash		$45.00
201412000002	12/4/2014 1:15:37 PM	Dallas Cowboys	$45.00	Cash		$45.00
201501000042	1/20/2015 10:21:40 AM	Marcus Test	$135.00	Cash		$45.00
201501000042	1/20/2015 10:16:09 AM	Marcus Test	$135.00	Cash		$90.00
201501000043	1/20/2015 10:47:04 AM	Harry Harrison	$45.00	Cash		$45.00
201501000038	1/16/2015 8:40:51 AM	Amendment Test	$110.00	Cash		$90.00
201501000035	1/16/2015 8:17:41 AM	George Vaughn	$45.00	Cash		$45.00
201501000036	1/16/2015 8:19:13 AM	George Vaughn	$45.00	Cash		$45.00
201501000037	1/16/2015 8:26:05 AM	George Vaughn	$45.00	Cash		$45.00

Total records : 15

Transaction Total : $725.00
Revenue Total : $725.00

Print Return

Select **Save** to save all results, including any comments. This locks in all entries and prevents future changes to the cashout.



Select **Clear** to clear all **Supervisor Cash Details** entries.

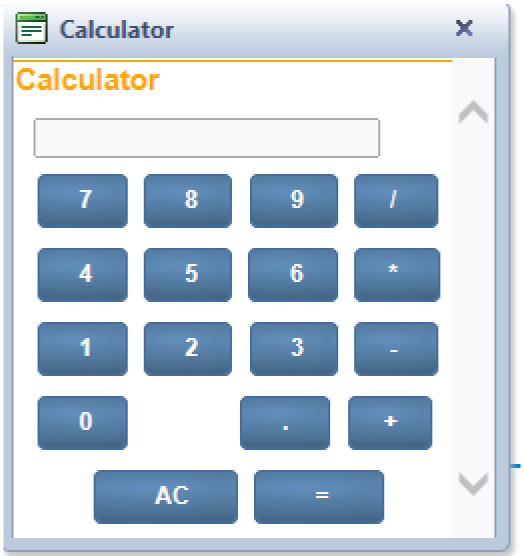
Entries in the System Total, Cashier Total, and Discrepancy columns are unaffected by the Clear button.

Select **Return** to return to the **Search For Cashout** page. If the user has not clicked **Save**, all unsaved data will be lost if the **Return** button is selected.

Select **Calculator** to launch the DAVE™ application calculator, which is useful in double checking figures and limiting errors.

Standard functionality exists: the **/** symbol divides, the ***** multiplies; the **AC** button clears contents.

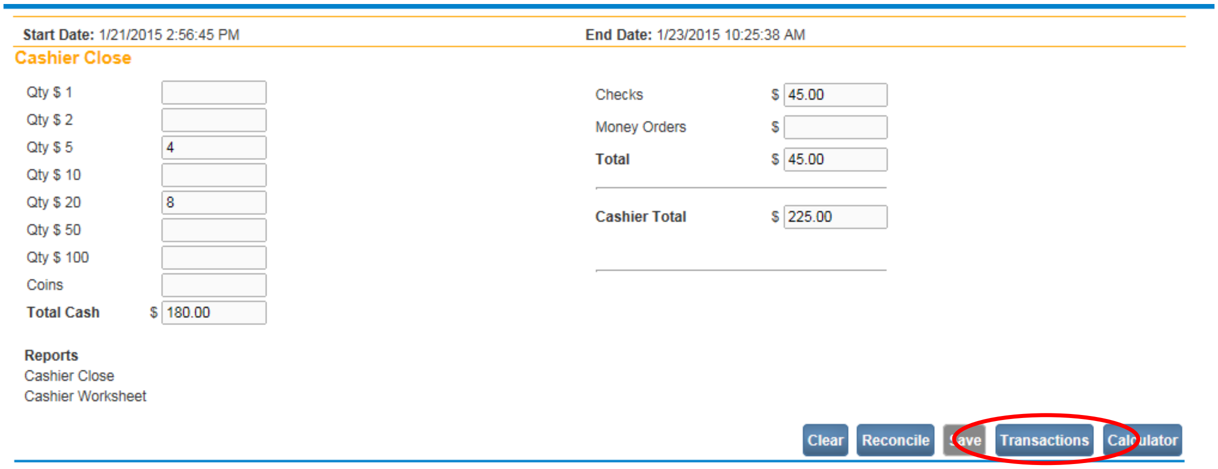
Click on the **X** in the upper right corner to close the calculator window.



12.2.1 Retrieving Transactions and Reconciling

Although the review of transactions is not required prior to reconciling an account, DAVE™ provides the **Cashier Transactions** page in order to view each transaction that was entered by a specific user based on the last **Cashier Close** (the **Start Date**) and the current date (**End Date**), which are displayed at the top of the page.

To access the **Cashier Transactions** page, select the **Transactions** button at the bottom of the **Cashier Close** page.


Start Date: 1/21/2015 2:56:45 PM   End Date: 1/23/2015 10:25:38 AM

Cashier Close

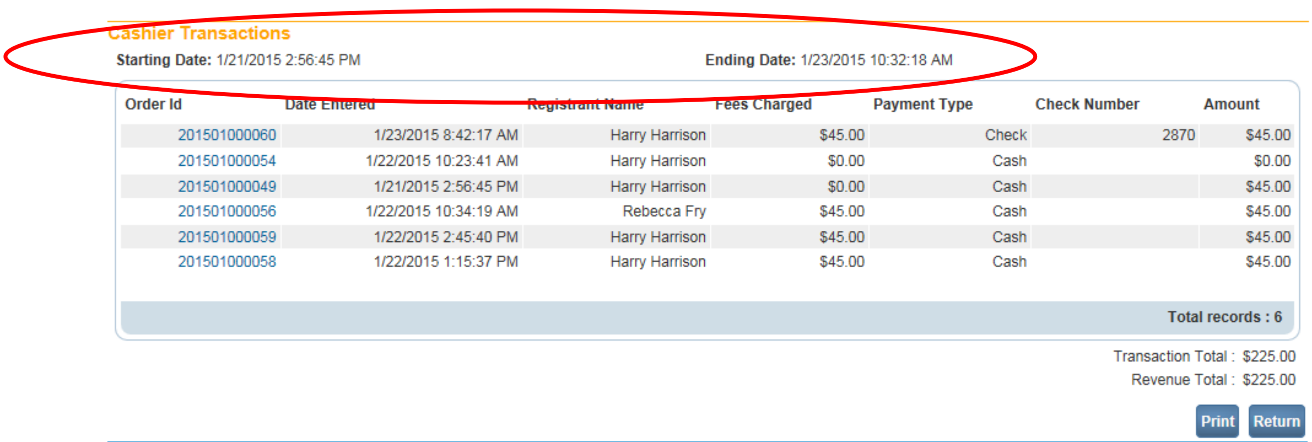
Qty $ 1	
Qty $ 2	
Qty $ 5	4
Qty $ 10	
Qty $ 20	8
Qty $ 50	
Qty $ 100	
Coins	
Total Cash	$ 180.00

Checks	$ 45.00
Money Orders	$
Total	$ 45.00
Cashier Total	$ 225.00

Reports
Cashier Close
Cashier Worksheet

Clear Reconcile Save Transactions Calculator

The **Cashier Transactions** page displays and lists all transactions that were processed from the **Start Date** through the **End Date**.


Cashier Transactions

Starting Date: 1/21/2015 2:56:45 PM   Ending Date: 1/23/2015 10:32:18 AM

Order Id	Date Entered	Registrant Name	Fees Charged	Payment Type	Check Number	Amount
201501000060	1/23/2015 8:42:17 AM	Harry Harrison	$45.00	Check	2870	$45.00
201501000054	1/22/2015 10:23:41 AM	Harry Harrison	$0.00	Cash		$0.00
201501000049	1/21/2015 2:56:45 PM	Harry Harrison	$0.00	Cash		$45.00
201501000056	1/22/2015 10:34:19 AM	Rebecca Fry	$45.00	Cash		$45.00
201501000059	1/22/2015 2:45:40 PM	Harry Harrison	$45.00	Cash		$45.00
201501000058	1/22/2015 1:15:37 PM	Harry Harrison	$45.00	Cash		$45.00

Total records : 6

Transaction Total : $225.00
Revenue Total : $225.00

Print Return

The Cashier Total on the Cashier Closeout page should match the Transaction Total on the Cashier Transactions page.

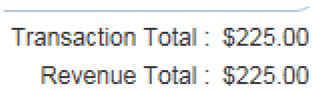
In addition to all transactions entered, the **Cashier Transactions** data grid listing also displays the total dollar amount of all transactions along with other pertinent transaction-related information. The **Transaction Total** shown is the total to reconcile against.

The data grid listing displays a row for each order payment received. The rows initially sort in descending order by **Order Id** (i.e., the most recent transaction appears at the top of the list), but can be changed by clicking on any of the column header links. The **Cashier Transactions** page also includes the following information.

Order Id	Application-assigned identification number—assigned to the order when it gets created. If the order is part of a batch file that will be paid for by an invoice, then the invoice number appears in this column in place of the order number.
Date Entered	Date the payment was entered
Registrant Name	Name on the certificate requested

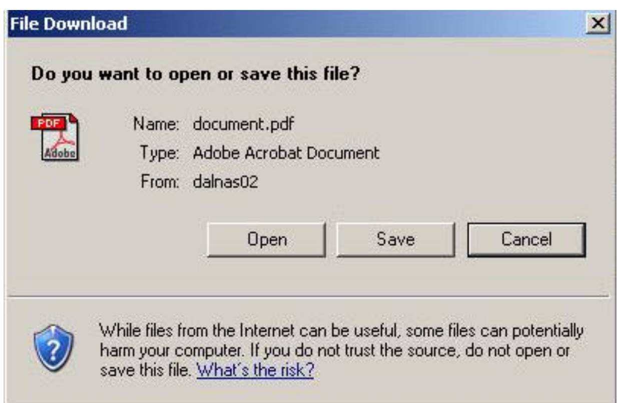
Fees Charged	Amount of money that was charged for the service provided
Payment Type	Type of money received for the service: cash, check, money order, or invoice
Check Number	Number of the check or money order that was entered on the Payments page
Amount	Total amount of money received by the cashier, refunded to the customer/applicant, or is a result of a bad payment (e.g. NSF, etc.). If parenthesis surrounds the amount, i.e., ($5.00), the amount enclosed is a refund and must be subtracted from the Transaction Total.

At the bottom of the **Cashier Transactions** page is a **Transaction Total** and a **Revenue Total**, and since these totals are similar in nature, the tooltips text explains the primary differences.



DAVE™ also provides a **Print** button and a **Return** button at the bottom of the **Cashier Transactions** page. Click the **Return** button to close the **Cashier Transactions** page and return to the main **Cashier Close** page.

Selecting **Print** launches the **File Download** dialog. Click the **Open** button to open the **Cashier Transaction Report** for printing.



The following extract of the **Cashier Transaction Report** shows the layout of this report.

Cashier Transaction Report

Report Parameters

Cashout ID 10

New York
Department of Health
Health & Welfare Building
Some Street, Somewhere

OFFICE: Office of Vital Records
USER: superuserg

User Name	Super User Gary	**Beginning Cash Out Date**	1/21/2015 2:56:45PM
Closed Date		**Ending Cash Out Date**	

Order Number	Quantity	Order Source	Service Name	Payment Date	Registrant Name	Fees Charged	Payment Type	Check Number	Payment Amount
201501000049	1	Public Office	Death CC	01/21/2015 2:56:45PM	Harrison, Harry	$45.00	Cash		$45.00
	-1	Public Office	Death CC	01/21/2015 2:56:45PM	Harrison, Harry	$-45.00			
201501000054	1	Mail	DEATHVAULT	01/22/2015 10:23:41AM	Harrison, Harry	$45.00	Cash		
	-1	Mail	DEATHVAULT	01/22/2015 10:23:41AM	Harrison, Harry	$-45.00			
201501000056	1	Mail	Death CC	01/22/2015 10:34:19AM	Fry, Rebecca	$45.00	Cash		$45.00
201501000058	1	Mail	Death CC	01/22/2015 1:15:37PM	Harrison, Harry	$45.00	Cash		$45.00
201501000059	1	Mail	Death CC	01/22/2015 2:45:40PM	Harrison, Harry	$45.00	Cash		$45.00
201501000060	1	Mail	Death CC	01/23/2015 8:42:17AM	Harrison, Harry	$45.00	Check	2870	$45.00
Total	**4**					**$180.00**			**$225.00**

Friday, January 23, 2015 10:41 am Page 1 of 1

Once all monies have been entered into the **Cashier Close** page and the cashier reviews the transactions, select the **Reconcile** button. Once the **Reconcile** button is selected, the **Save** button is enabled and the user can save all entries made to the **Cashier Close** page.

Start Date: 1/21/2015 2:56:45 PM **End Date:** 1/23/2015 11:22:27 AM

Cashier Close

Qty $ 1	
Qty $ 2	
Qty $ 5	4
Qty $ 10	
Qty $ 20	8
Qty $ 50	
Qty $ 100	
Coins	
Total Cash	$ 180.00

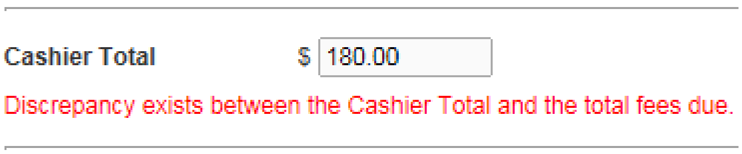
Checks	$
Money Orders	$
Total	$ 0.00
Cashier Total	$ 180.00

Discrepancy exists between the Cashier Total and the total fees due.

Reports
Cashier Close
Cashier Worksheet

Clear Reconcile Save Transactions Calculator

If there are differences between the totals entered on the **Cashier Close** page and the system calculated payment total, an error message displays below the **Cashier Total** control.



The cashier must re-count the money received, make any necessary corrections, and select the **Reconcile** button again. The discrepancy must be cleared up and the transactions reconciled until everything is balanced.

Entering the amounts shown (in **Total Cash**) balances the cash drawer. The error message has been replaced and the **Save** button is now enabled. All discrepancies must be resolved before **Save** will be enabled. Select the **Save** button to finish balancing/reconciling.

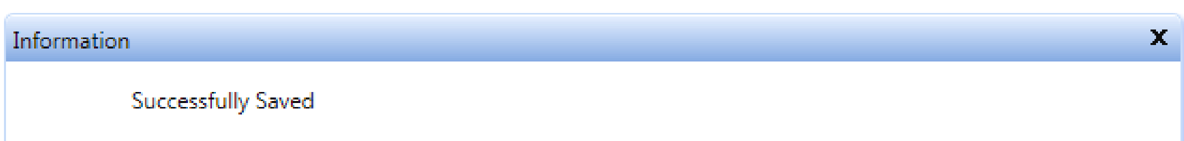
Once Save has been selected, no further changes are allowed.

Verify and re-enter values (if necessary) on the **Cashier Close** page so that the total matches the total on the transactions report. Click **Reconcile** again.

When a discrepancy occurs, it is a good practice for the cashier to print and review the **Cashier Transactions Report** to help locate potential discrepancies, and correct the data entry for any incorrectly entered payments.

When the reconciliation of the cashout is complete and there are no discrepancies, the **Save** button is enabled and the cashier must select it to save all entries and complete the close out. Selecting **Save** enables the **Reports** links for generating cashier-related reports that can be viewed or printed. To print any of these reports, click its link and select **Open** from the **File Download** dialog.

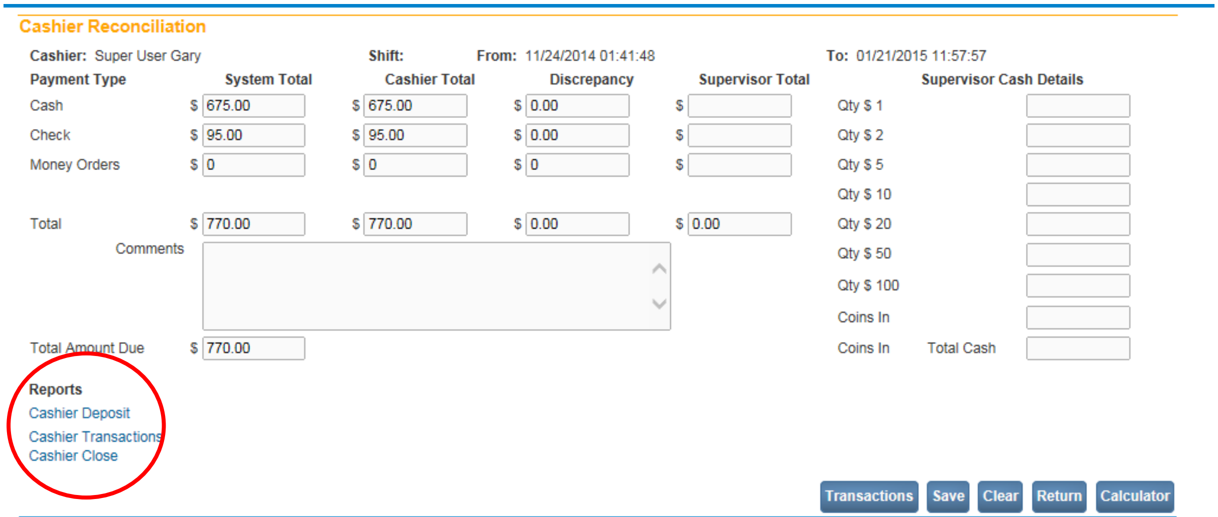
If no discrepancies exist, the system issues a successful popup message. Click **OK**.



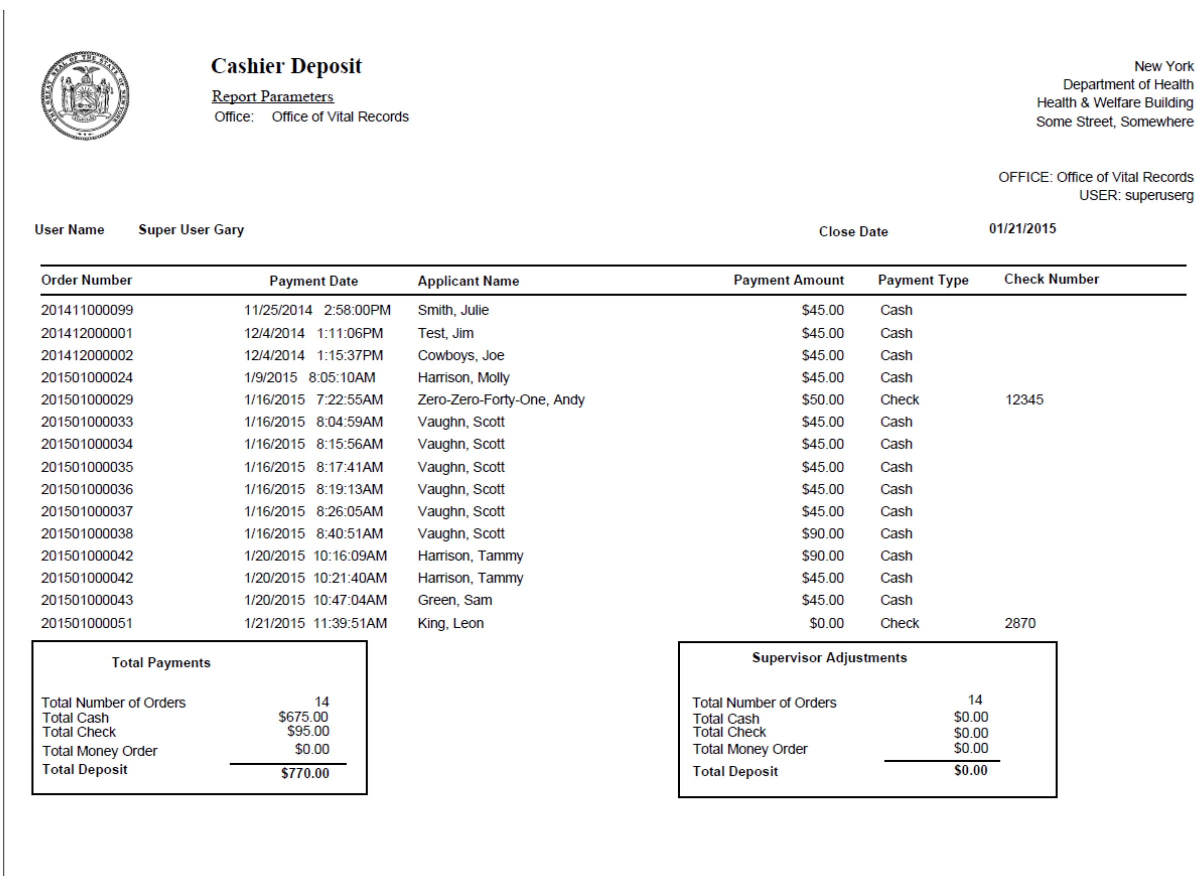
All controls and buttons on the **Cashier Close** page are disabled signifying that there is no further action required for the close out. The confirmation message "No transactions to cashout" appears below the **Cashier Total** box in red, and the links below **Reports** are enabled. Select the **OK** button from the popup message and exit the **Cashier Close** page by selecting any link from the **Main Menu**.

12.2.2 Accounting-Related Reports

Multiple accounting-related reports are available, such as: **Cashier Deposit, Cashier Transactions**, and **Cashier Close**, and **Cashier Worksheet**. Select any report link to launch the **File Download** dialog. Click the **Open** button to open the report for viewing and/or printing.



Sample Cashier Deposit Report



Cashier Deposit

Report Parameters
Office: Office of Vital Records

New York
Department of Health
Health & Welfare Building
Some Street, Somewhere

OFFICE: Office of Vital Records
USER: superuserg

User Name **Super User Gary** **Close Date** **01/21/2015**

Order Number	Payment Date	Applicant Name	Payment Amount	Payment Type	Check Number
201411000099	11/25/2014 2:58:00PM	Smith, Julie	$45.00	Cash	
201412000001	12/4/2014 1:11:06PM	Test, Jim	$45.00	Cash	
201412000002	12/4/2014 1:15:37PM	Cowboys, Joe	$45.00	Cash	
201501000024	1/9/2015 8:05:10AM	Harrison, Molly	$45.00	Cash	
201501000029	1/16/2015 7:22:55AM	Zero-Zero-Forty-One, Andy	$50.00	Check	12345
201501000033	1/16/2015 8:04:59AM	Vaughn, Scott	$45.00	Cash	
201501000034	1/16/2015 8:15:56AM	Vaughn, Scott	$45.00	Cash	
201501000035	1/16/2015 8:17:41AM	Vaughn, Scott	$45.00	Cash	
201501000036	1/16/2015 8:19:13AM	Vaughn, Scott	$45.00	Cash	
201501000037	1/16/2015 8:26:05AM	Vaughn, Scott	$45.00	Cash	
201501000038	1/16/2015 8:40:51AM	Vaughn, Scott	$90.00	Cash	
201501000042	1/20/2015 10:16:09AM	Harrison, Tammy	$90.00	Cash	
201501000042	1/20/2015 10:21:40AM	Harrison, Tammy	$45.00	Cash	
201501000043	1/20/2015 10:47:04AM	Green, Sam	$45.00	Cash	
201501000051	1/21/2015 11:39:51AM	King, Leon	$0.00	Check	2870

Total Payments	
Total Number of Orders	14
Total Cash	$675.00
Total Check	$95.00
Total Money Order	$0.00
Total Deposit	**$770.00**

Supervisor Adjustments	
Total Number of Orders	14
Total Cash	$0.00
Total Check	$0.00
Total Money Order	$0.00
Total Deposit	**$0.00**

Cashier Deposit

Report Parameters
Office: Office of Vital Records

New York
Department of Health
Health & Welfare Building
Some Street, Somewhere

OFFICE: Office of Vital Records
USER: superuserg

Total Adjusted Deposit	
Total Number of Orders	14
Total Cash	675.00
Total Check	95.00
Total Money Orders	0.00
Total Deposit	**$770.00**

Sample Cashier Transaction Report

Cashier Transaction Report

Report Parameters

Cashout ID 7

New York
Department of Health
Health & Welfare Building
Some Street, Somewhere

OFFICE: Office of Vital Records
USER: superuserg

User Name Super User Gary
Closed Date 01/21/2015

Beginning Cash Out Date 11/24/2014 1:41:48PM
Ending Cash Out Date 1/21/2015 11:57:57AM

Order Number	Quantity	Order Source	Service Name	Payment Date	Registrant Name	Fees Charged	Payment Type	Check Number	Payment Amount
201411000099	1	Mail	Death CC	11/25/2014 2:58:00PM	Smith, John	$45.00	Cash		$45.00
201412000001	1	Mail	Death CC	12/04/2014 1:11:06PM	Cowboys, Dallas	$45.00	Cash		$45.00
201412000002	1	Mail	Death CC	12/04/2014 1:15:37PM	Cowboys, Dallas	$45.00	Cash		$45.00
201501000024	1	Public Office	Death CC	01/09/2015 8:05:10AM	Harrison, Harry	$45.00	Cash		$45.00
201501000029	1	Public Office	Death CC	01/16/2015 7:22:55AM	Zero-Zero-Forty-One, O.	$45.00	Check	12345	$50.00
201501000033	1	Public Office	DEATHVAULT	01/16/2015 8:04:59AM	Vaughn, George	$45.00	Cash		$45.00
201501000034	1	Public Office	DEATHVAULT	01/16/2015 8:15:56AM	Vaughn, George	$45.00	Cash		$45.00
201501000035	1	Public Office	DEATHVAULT	01/16/2015 8:17:41AM	Vaughn, George	$45.00	Cash		$45.00
201501000036	1	Public Office	DEATHVAULT	01/16/2015 8:19:13AM	Vaughn, George	$45.00	Cash		$45.00
201501000037	1	Public Office	DEATHVAULT	01/16/2015 8:26:05AM	Vaughn, George	$45.00	Cash		$45.00
201501000038	1	Public Office	DEATHVAULT	01/16/2015 8:40:51AM	Vaughn, George	$45.00	Cash		$90.00
	1	Public Office	DEATHVAULT	01/16/2015 8:40:51AM	Test, Amendment	$45.00			
	1	Public Office	Dispostion Permit	01/16/2015 8:40:51AM	Test, Amendment	$20.00			

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Sample Cashier Close Report

Cashier Close

Report Parameters

New York
Department of Health
Health & Welfare Building
Some Street, Somewhere

OFFICE: Office of Vital Records
USER: superuserg

User Name	Super User Gary	Beginning Date	11/24/2014 1:41:48PM
Close Date	1/21/2015 11:57:57AM	Ending Date	1/21/2015 11:57:57AM
Cashout ID	7		

Order Number	Entered	Applicant Name	Payment Amount	Payment Type	Check Number
201411000099	11/25/2014 2:58:00PM	Smith, Julie	$45.00	Cash	
201412000001	12/4/2014 1:11:06PM	Test, Jim	$45.00	Cash	
201412000002	12/4/2014 1:15:37PM	Cowboys, Joe	$45.00	Cash	
201501000024	1/9/2015 8:05:10AM	Harrison, Molly	$45.00	Cash	
201501000029	1/16/2015 7:22:55AM	Zero-Zero-Forty-One, Andy	$50.00	Check	12345
201501000033	1/16/2015 8:04:59AM	Vaughn, Scott	$45.00	Cash	
201501000034	1/16/2015 8:15:56AM	Vaughn, Scott	$45.00	Cash	
201501000035	1/16/2015 8:17:41AM	Vaughn, Scott	$45.00	Cash	
201501000036	1/16/2015 8:19:13AM	Vaughn, Scott	$45.00	Cash	
201501000037	1/16/2015 8:26:05AM	Vaughn, Scott	$45.00	Cash	
201501000038	1/16/2015 8:40:51AM	Vaughn, Scott	$90.00	Cash	
201501000042	1/20/2015 10:16:09AM	Harrison, Tammy	$90.00	Cash	
201501000042	1/20/2015 10:21:40AM	Harrison, Tammy	$45.00	Cash	
201501000043	1/20/2015 10:47:04AM	Green, Sam	$45.00	Cash	
201501000051	1/21/2015 11:39:51AM	King, Leon	$0.00	Check	2870

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12.3 VitalChek Close

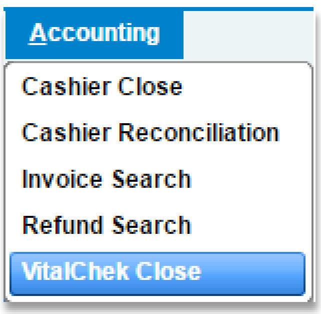
Credit card and EFT payment closeouts are handled separately from other closeout processes. The **VitalChek Close** page is used for cashing out credit card orders only.

The DAVE™ application includes a **VitalChek Close** feature. The **VitalChek Close** page is used to reconcile daily credit card transactions and deposit the credit cards funds via an ACH deposit.

Typically, the **VitalChek Close** process occurs at the end of the business day. Some jurisdictions choose to close out their credit card transactions more than once per day. VitalChek credit card payments can be configured to be closed by a single person in an office or by each cashier.

The standard process used to reconcile credit card transactions is:

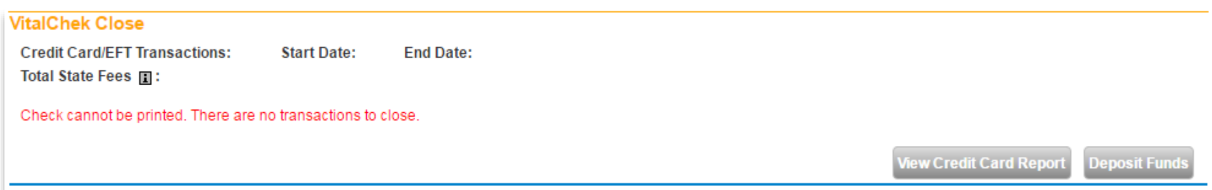
1	User reviews all credit card transactions since the last close was performed.
2	If correct, user accepts or closes the transactions. If incorrect, user tries to reconcile the difference or calls The Provider Services Unit at the VitalChek corporate office. Once the problem is resolved, user accepts transactions.
3	User prints the VitalChek check. The VitalChek check includes the sum of all the state fees for the credit card orders processed since last close.



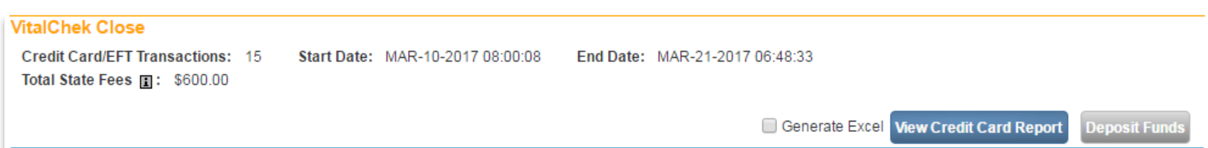
To run the VitalChek Close process, from the *Main Menu* select *Accounting* and then select *VitalChek Close*.

The *VitalChek Close* page will be displayed.

Access to the VitalChek close feature is based on security privileges.



If there are no credit card transactions since the last date the VitalChek close was run, when the *VitalChek Close* page initially displays, the View Credit Card Report, and Deposit Funds buttons are disabled. A message is also displayed in red stating, “Check cannot be printed. There are no transactions to close.



If there are credit transactions since the last date the VitalChek close was run, when the *VitalChek Close* page initially displays only the Deposit Funds button will be disabled.

The VitalChek Close page displays the following items:

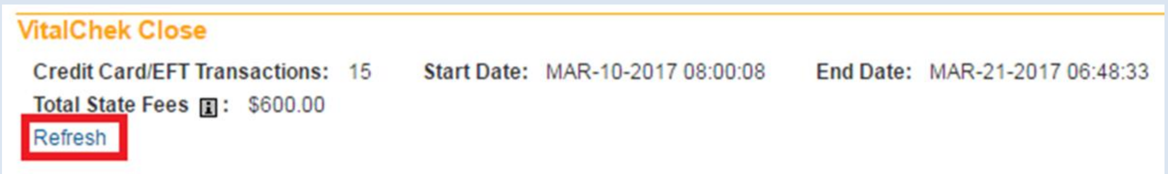
Credit Card Transactions	Total number of authorized transactions since the last close.
Start Date	System-filled with date and time of the first transaction in the close.
End Date	System-filled with current date and time.

Total State Fees	Sum of the state fees (excludes VitalChek fee and shipping fee[s]) for all authorized transactions—minus the sum of the state fees for all voided or canceled transactions between start and end date.
Check Number	Pre-printed check number on the check paper provided by VitalChek.

The VitalChek Close page determines the appropriate account and amount of transactions to cash out based on the current office or cashier performing the VitalChek Close.

Select the View Credit Card Report to initiate the VitalChek Close process. Once selected a message will be displayed stating, “The VitalChek Close Report Job has been created. Please check your message for results.”

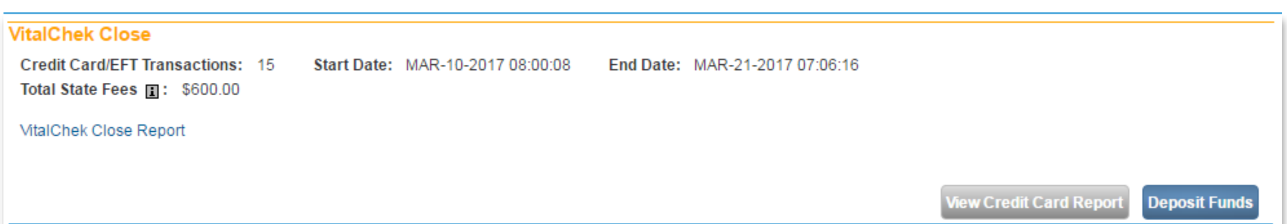
You can also remain on the *VitalChek Close* page and simply select the Refresh button that is displayed.



Once the *VitalChek Close* job is complete, the Refresh link will be updated with a link to the *VitalChek Close* Report.

Depending on the amount of transactions to process the job may take a few sections to several minutes to run.

Once the job is complete, return to the *VitalChek Close* page and the *View Credit Report* button will be disabled, however the *Deposit Funds* buttons will be enabled. A *VitalChek Close Report* link will also now be displayed.



Select the *VitalChek Close Report* link to view the transactions and ensure there are no errors.

VitalChek Close Report

Report Parameters

Cash Out Id: 9197

The State of Oregon
Department of Human Services

SAMPLE VC CLOSE REPORT

OFFICE: Center for Health Statistics
USER: oriadmin

Cash Out Date:

Check Number:

Payment Transactions

Order #	Applicant	Registrant	Copies	Service	Agency Fee	Delivery Fee	VitalChek Fee	Total Fee
20170300016	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300017	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300018	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300019	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300020	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300021	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300022	Your Name	Cert, Name On	1	Birth CC Short	$52.00	$20.00	$11.00	$83.00
20170300023	Your Name	Cert, Name On	1	Birth CC Short	$52.00	$20.00	$11.00	$83.00
20170300024	Your Name	Cert, Name On	1	Birth CC Short	$52.00	$20.00	$11.00	$83.00
20170300025	First Last	Last, John John	1	Death CC Short	$52.00	$20.00	$11.00	$83.00
20170300026	First Last	Last, John John	1	Death CC Short	$52.00	$20.00	$11.00	$83.00
20170300027	First Last	Last, John John	1	Death CC Short	$52.00	$20.00	$11.00	$83.00
20170300028	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300029	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00
20170300030	Test Tester	Testing, Test	1	Death CC Long	$32.00	$20.00	$11.00	$63.00

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VitalChek Close Report

Report Parameters

Cash Out Id: 9197

The State of Oregon

SAMPLE VC CLOSE REPORT

Portland, OR 97232

OFFICE: Center for Health Statistics
USER: oriadmin

Cash Out Date:

Check Number:

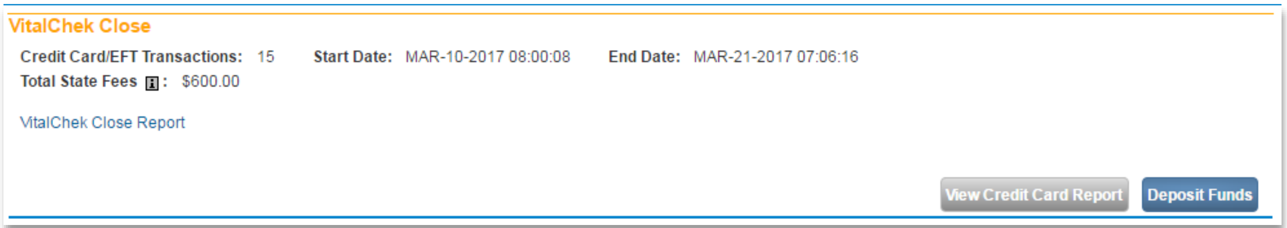
Total	**$600.00**	**$300.00**	**$165.00**	**$1,065.00**

Total Agency Fees	**$600.00**
Total VitalChek Fees (CC, EFT, MO, Check)	**$465.00**
Delivery and VitalChek Fees for orders not paid with Credit Card or EFT	**$0.00**
Total Payment	**$600.00**

Tuesday, March 21, 2017 6:54:27PM Page 2 of 2

If the VitalChek Close Report is incorrect, then reconciliation of the difference will need to occur before selecting the Deposit Funds button. Call the Provider Services Unit at the VitalChek corporate office for assistance.

Once the *VitalChek Close Report* is reviewed and all transactions are deemed correct, select the *Deposit Funds* button the *VitalChek Close* page.



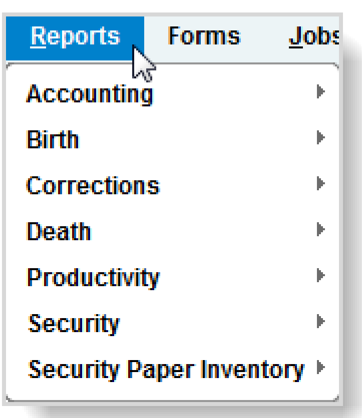
The funds will be deposited via the ACH process into the offices designated account.

13. Reports

The ability to select the *Reports* link and the individual reports is based on user security privileges.

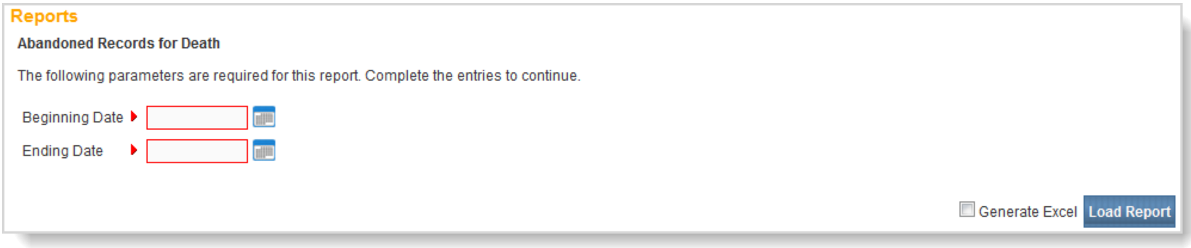
13.1 Running Reports from the Reports Menu

To generate reports, authorized users select one of the report menu options from the Reports Menu.



Each Reports menu option may have multiple types of reports listed when expanded. Select one of the reports and the page refreshes for entry of parameters.

Enter the required parameters and select the *Load Report* button and print and/or save the PDF document.

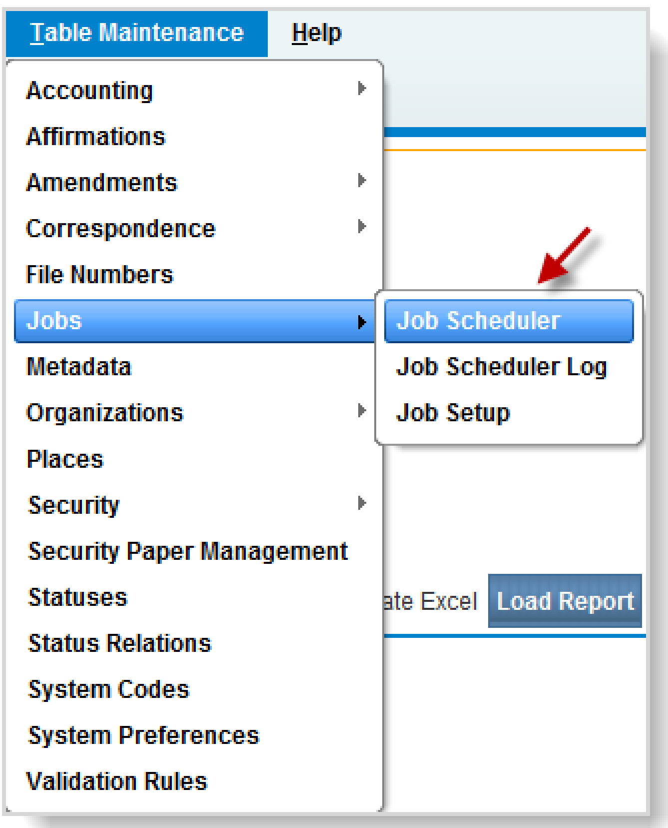


If the user is not a State agency user, DAVE™ filters the report to include only those cases owned by the facility or office running the report.

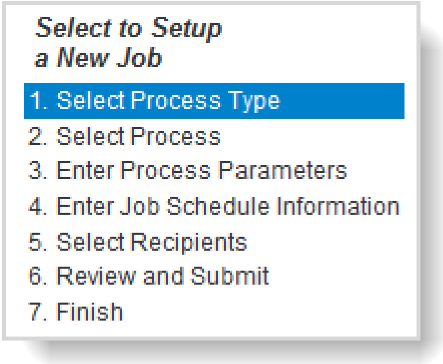
13.2 Running Reports from the Job Scheduler

Complex reports requiring multiple calculations or queries must be run from the Job Scheduler.

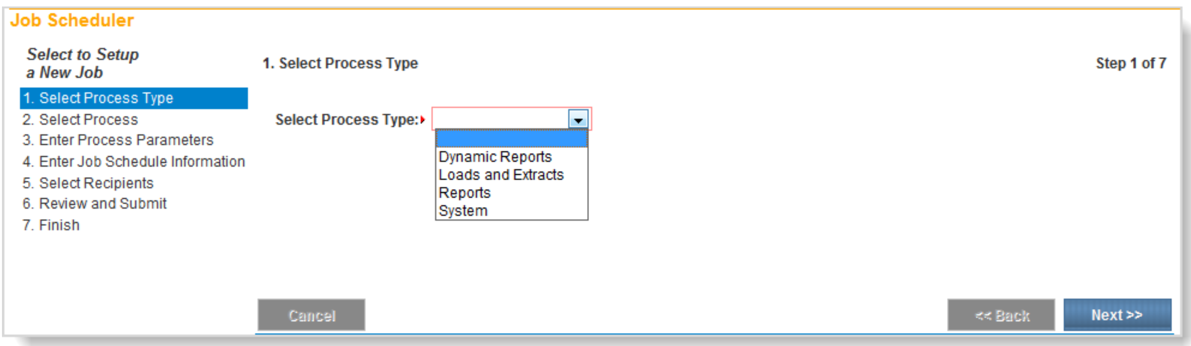
From the Main Menu choose *Table Maintenance > Jobs*, select the *Job Scheduler* link.



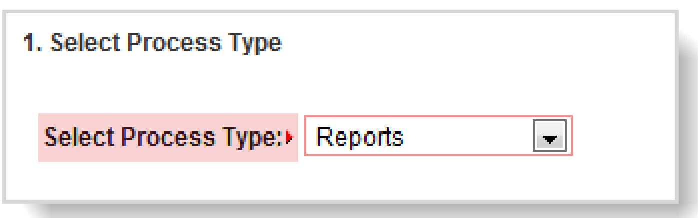
The Job Scheduler in DAVE™ is a job wizard that steps through seven different pages. Running reports using this functionality enables specific critera to be entered to affect the data that is being output to the report.



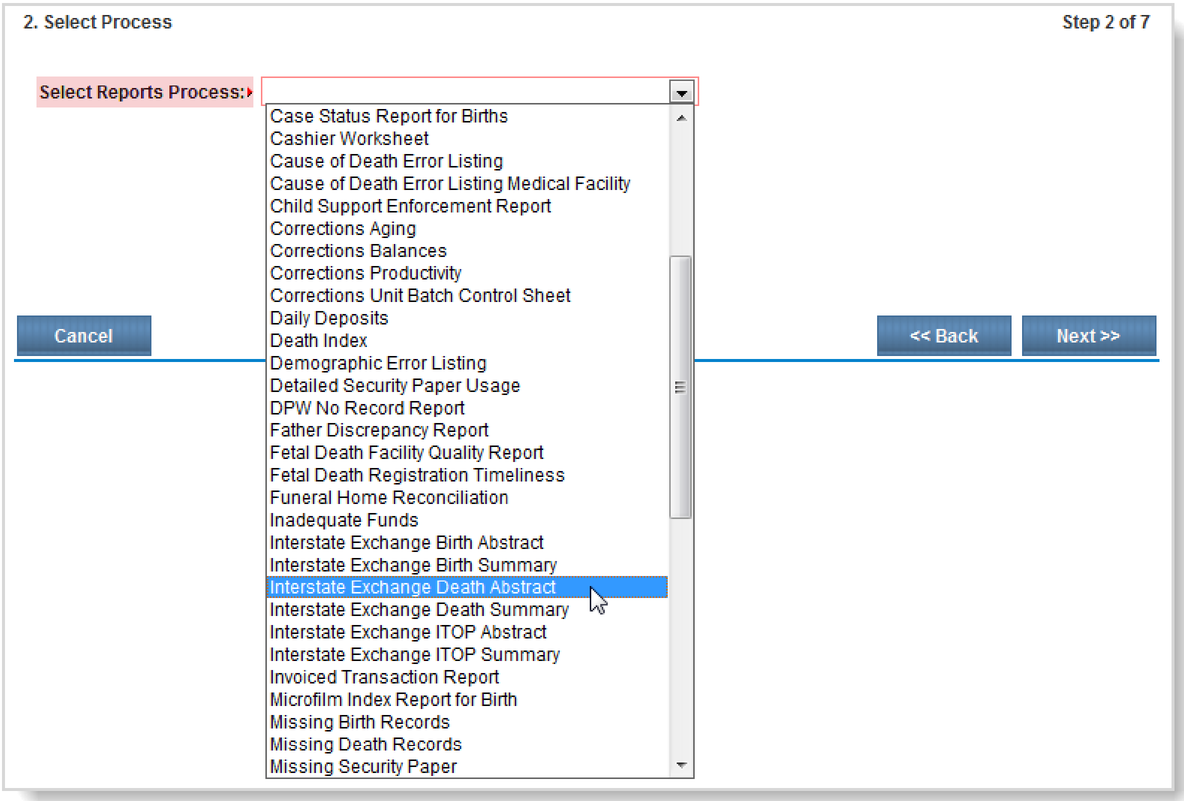
Step 1: The opening page of the Job Scheduler displays the Select Process Type dropdown list. This is Step 1 of completing the job wizard.



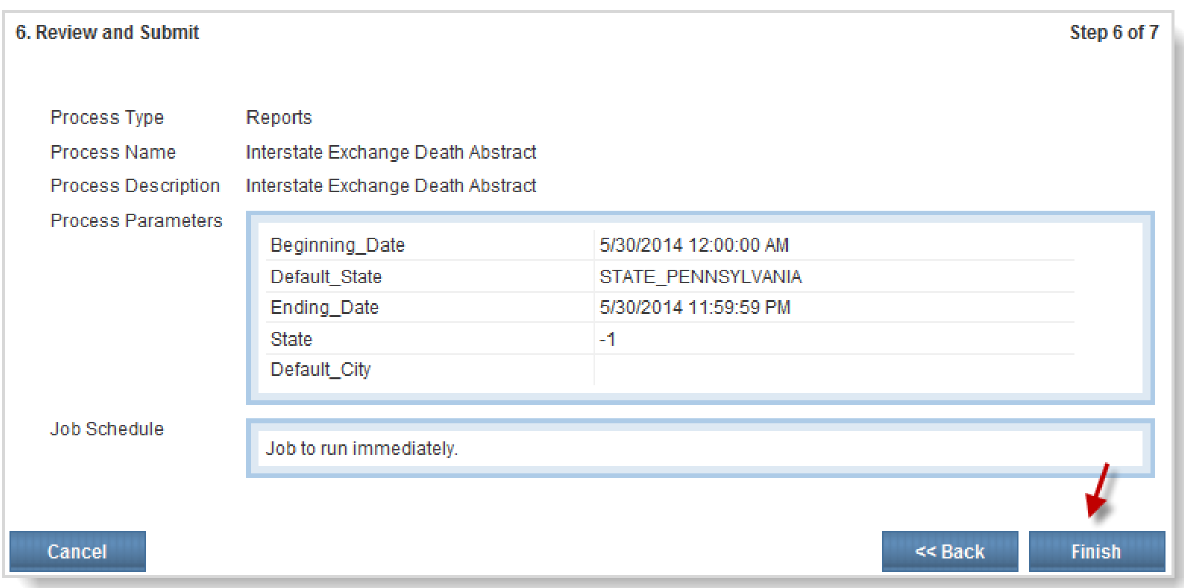
Select *Reports* from the *Select Process Type* dropdown and select *Next*.



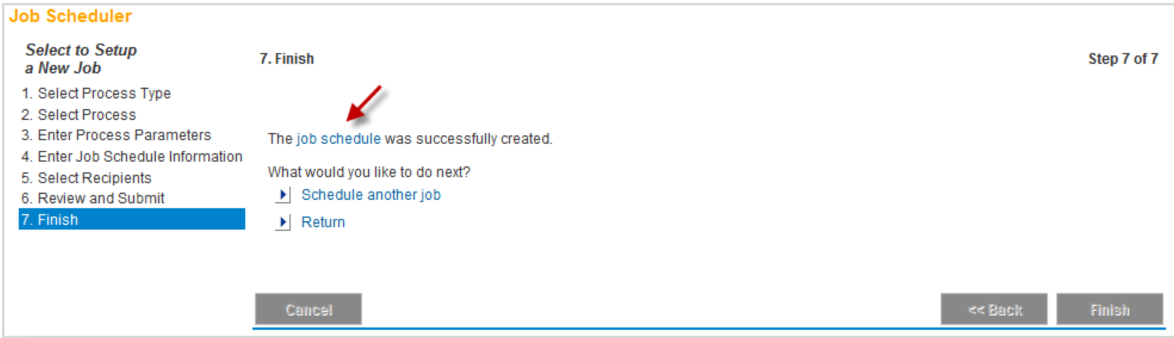
Step 2: Step 2 requires the selection of a specific report from the *Select Reports Process* dropdown. Samples of the reports available for output in DAVE™ are included in the "Core_Att_K_Reports" documentation.



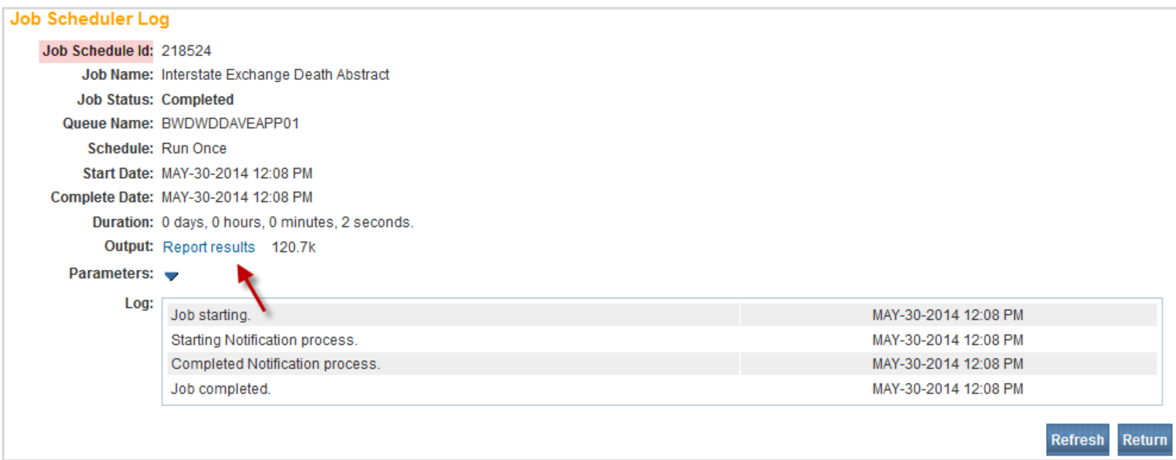
Steps 3-6: Continue to enter desired criteria on all the pages of the Job Scheduler wizard through Step 6. Select the *Finish* button.



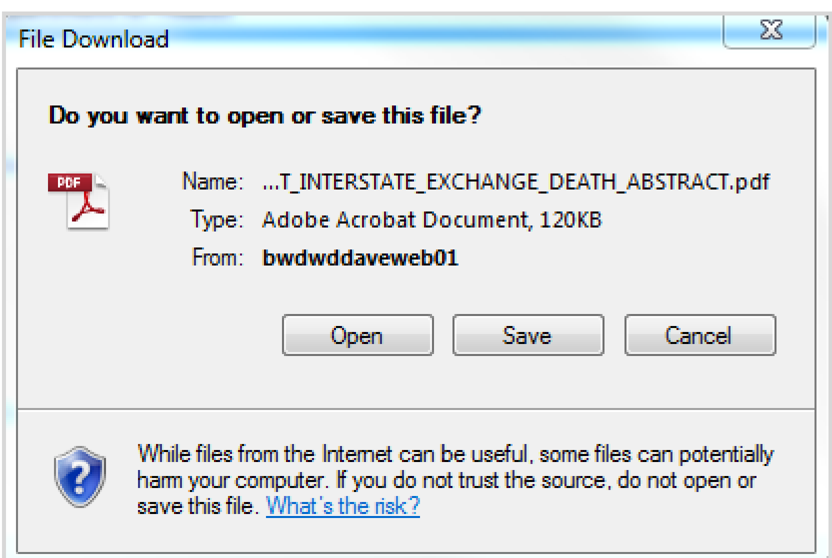
Step 7: In Step 7, DAVE™ will acknowledge successful completion of the job wizard. A link to the *job schedule* appears. The user is also given the option to *Schedule another job,* or *Return* to the Main Menu. Select the *job schedule* link.



The completed page appears with all the details of the job. Select the *Report results* link.



Select *Open* to open the file for viewing.



The report is opened for viewing. The following is an extract from the Interstate Exchange Death Abstract report, as selected in Step 2 above.

Interstate Exchange Death Abstract

SFN

Alias Name(s):

Decedent Name	First	Middle	Last	Suffix			
Gender	Social Security	Age	Under 1 Year		Under 1 Day		Date of Birth
			Month	Day	Hour	Min	
Birth Place (City & State or Country)	Resident State	Resident County					
Resident City	Resident Street Address	Resident Zip	Inside City Limits?				
In Armed Forces?	Marital Status at Death	Surviving Spouse Name (First, Middle, Maiden Last)					
Father's Name (First, Middle, Last)	Mother's Name (First, Middle, Maiden Last)	Informant's Name (First, Middle, Last)					
Informant's Relationship	Informant Address (Street Address, City, State, Zip)	Type of Place of Death					
Facility Name	Facility City, State, Zip	County of Death					
Name and Complete Address of Funeral Facility							
Funeral Licensee Name (First, Middle, Last)	License Number	Date Pronounced Dead	Time Pronounced Dead				
Method of Disposition	Place of Disposition						
Pronouncer Name(First, Middle, Last)	License Number	Date Signed					
Date of Death	Time of Death	Medical Examiner Contacted					
Cause of Death A	Approximate interval						
Cause of Death B	Approximate interval						
Cause of Death C	Approximate interval						
Cause of Death D	Approximate interval						
Other Significant Conditions Contributing to Death	Autopsy Performed						
	Autopsy Findings Used						
Did Tobacco Use Contribute to Death?	If Female	Manner of Death					
Date of Injury	Time of Injury	Place of Injury	Injury at Work				
Location of Injury							
Describe How Injury Occurred:	If Transportation Injury						
Certifier Name (First, Middle, Last)	Certifier Address (Street Address, City, State, Zip)						
Certifier Title	License Number	Date Certified	Date Filed				
Decedent Education	Decedent Hispanic Origin	Decedent Race					
Decedent's Usual Occupation	Kind of Business / Industry						

There are a number of reports that authorized users can access in DAVE™. These reports can be a valuable aide in managing the vital records business. For more information on reports and access to reports, see the System Administrator.

14. Index