

**DAVE™**  
**One Integrated System for All**  
**Your Vital Record Business Needs**



**Database Application for Vital Events**

**A LexisNexis® Product**

LexisNexis VitalChek Network, Inc.  
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Brentwood, TN 37027

**Maine**  
**Death Module**  
**Local Office User**  
**Training Exercises**

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## Section 1: General DAVE™ Navigation

### Exercise 1.1 – Logging Into DAVE™

**Skill Learned:** How to log into the **DAVE™** application.

1. Double click the **DAVE™** icon on your desktop or select **DAVE™** from the Favorites Bookmark) from within your web-browser.
2. Enter your **User Name** and **Password**.
3. Click the **Login** button.



**Maine**  
**Department of Health and Human Services**

Username: Trainmccs1 Password: ●●●●●●●●

Version #: 13.2.3.42662

[Forgot your password?](#) **Login**

4. If your **User Name** is associated with more than one office as shown below, select the appropriate office.



**Maine**  
**Department of Health and Human Services**

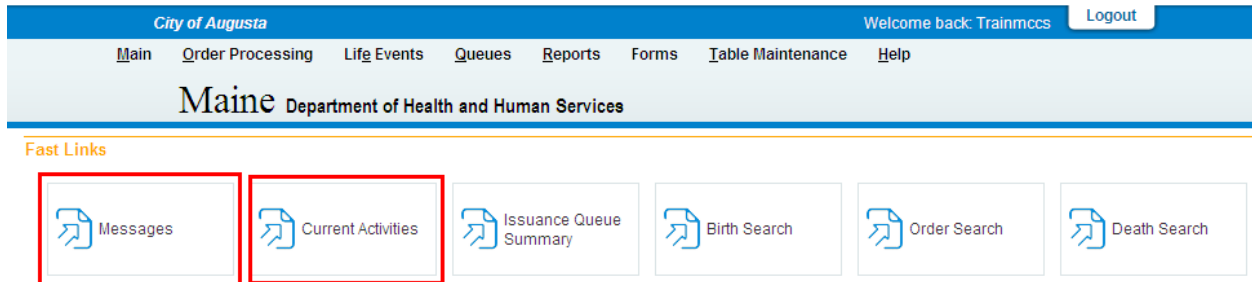
Select your Office:  
Town of Merrill  
Town of Smyrna

Version #: 13.2.3.42662

**Cancel**

- Once you have made your office selection, enter to finish logging into the **DAVE™** application.

You should now be logged into the **DAVE™** application **Home** page with the **Current Activities** and **Messages** fast links displayed.



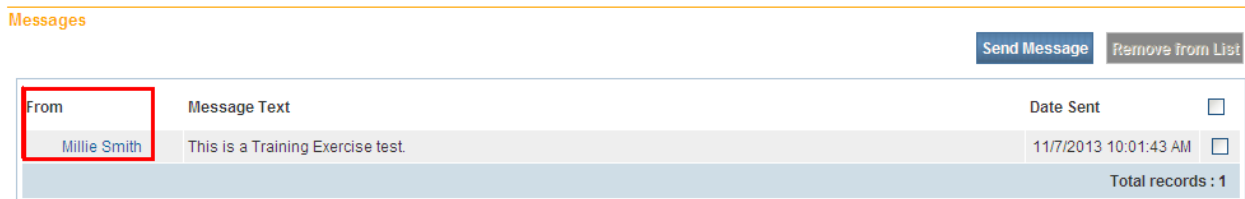
### Exercise 1.2 – Messages

**Skill Learned:** Basic Navigation within the **Messages** window.

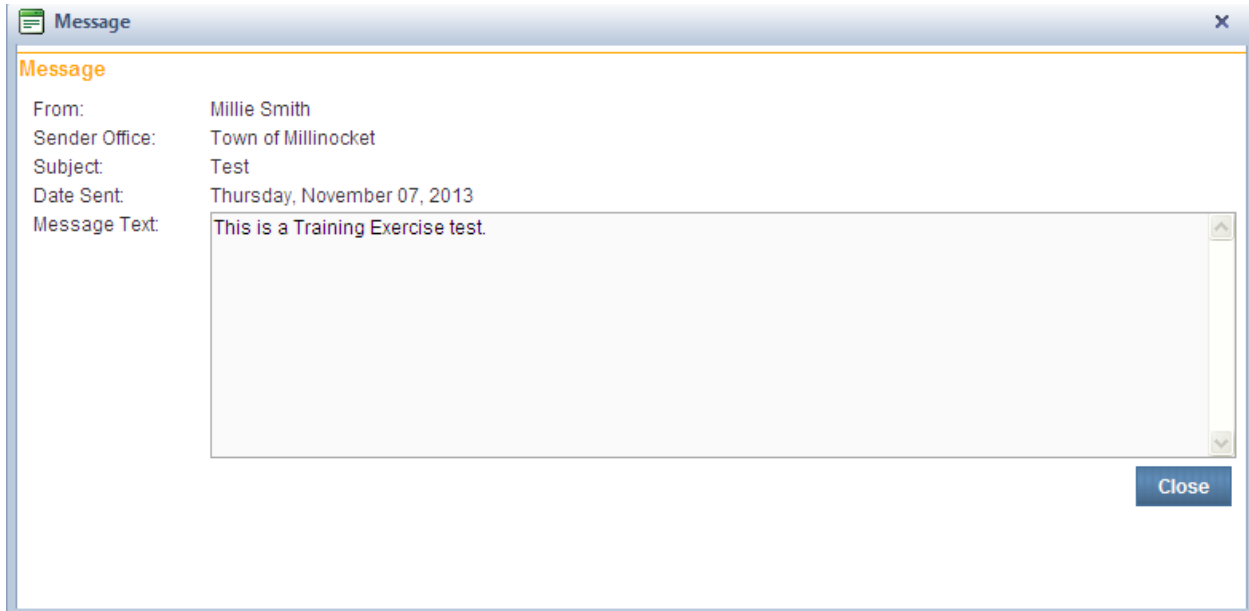
The **Messages** window is one of two windows that display upon logging into **DAVE™**. Initially, this window is minimized. Click the Messages fast link to open or maximize the **Messages** window. Some **Messages** are text messages sent from one system user to another, while others are automatically system generated during the registration process.

The **Messages** window is a grid that displays all of the messages that have been sent to the user or current office (the office selected at login.) To read a message, click the underlined link in the **From** column. The **Message Text** column displays all or a portion of the message that was sent, depending on message length. **Date Sent** displays the date and time the message was sent. Notice that the **Remove from List** button is initially grayed out or disabled.

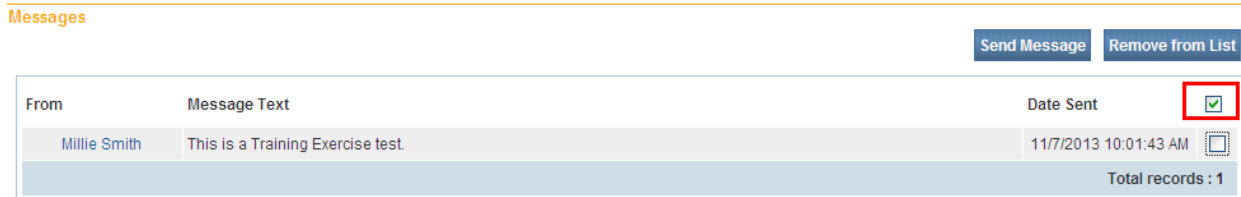
- Click any of the underlined links in the **From** column of the **Messages** window to read that particular message.



- The **Message** window is a popup that appears on top of the home **DAVE™** page. After reading the message, click the **Close** button.



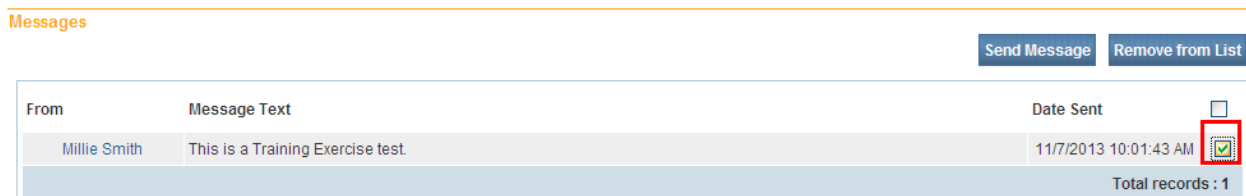
- Place a checkmark in the checkbox next to the **Date Sent** column header.



- Notice that the **Remove from List** button is now active. Clicking the **Remove from List** button with the **Date Sent** checkbox selected will delete all selected messages from the list.

**Note: Deleted messages cannot be restored. Do not delete messages unless you are sure that you will not need them.**

- Remove the checkmark from the checkbox next to the **Date Sent** column header and place a checkmark in any of the boxes next to a single message.
- Click the **Remove from List** button to remove a single message from the list.



- To create a message select the **Send Message** button. The Send Message box will expand.

Messages

Send Message

Remove from List

From	Message Text	Date Sent	<input type="checkbox"/>
Millie Smith	This is a Training Exercise test.	11/7/2013 10:01:43 AM	<input type="checkbox"/>

Total records : 1

Send Message

Recipients:

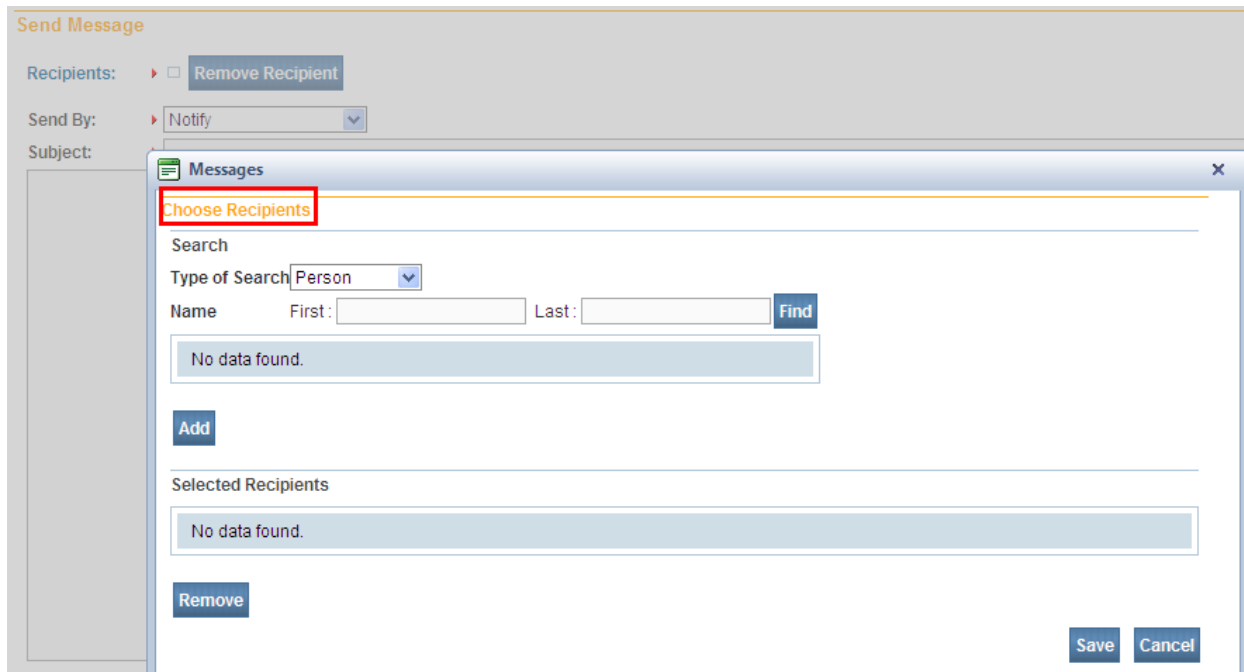
Remove Recipient

Send By:

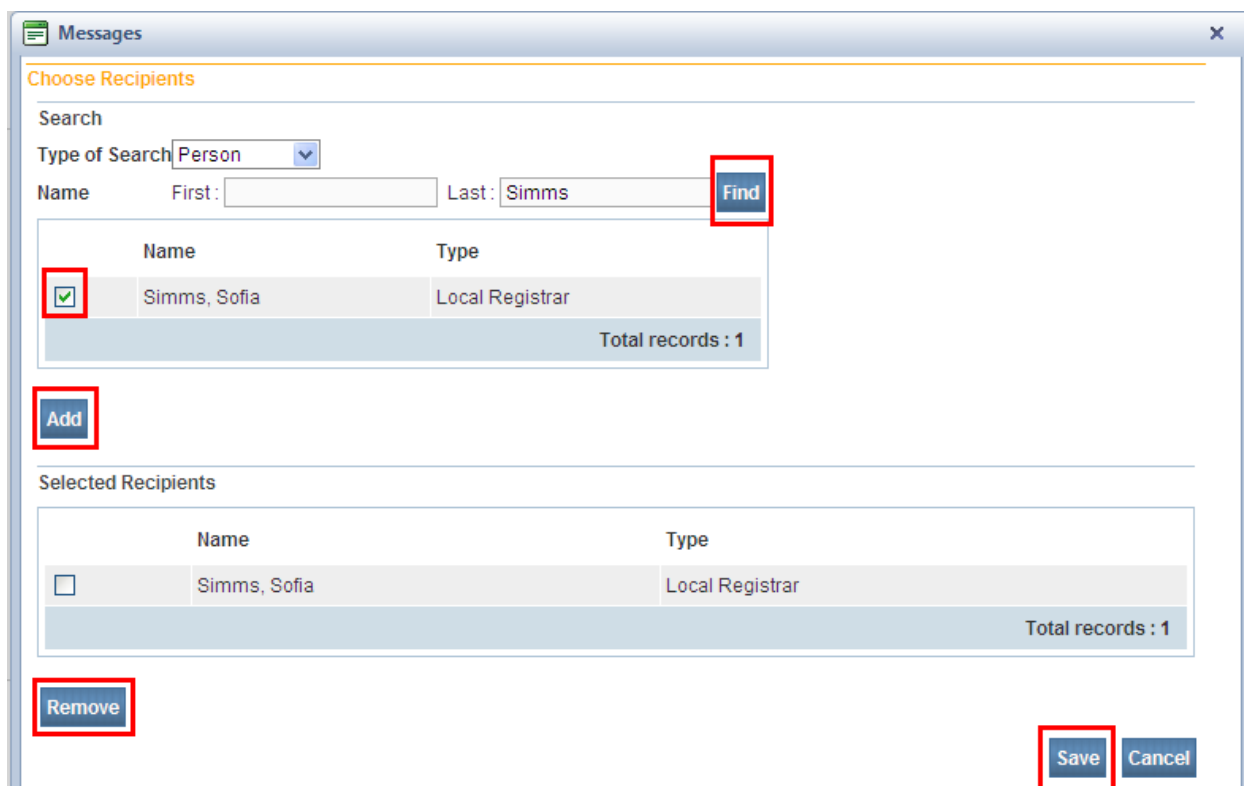
Subject:

Send Cancel

8. Click the **Recipients** link. The Choose Recipient box will open. The Type of Search defaults to “Person”. A search can be made on a “Person” or an “Organization”.

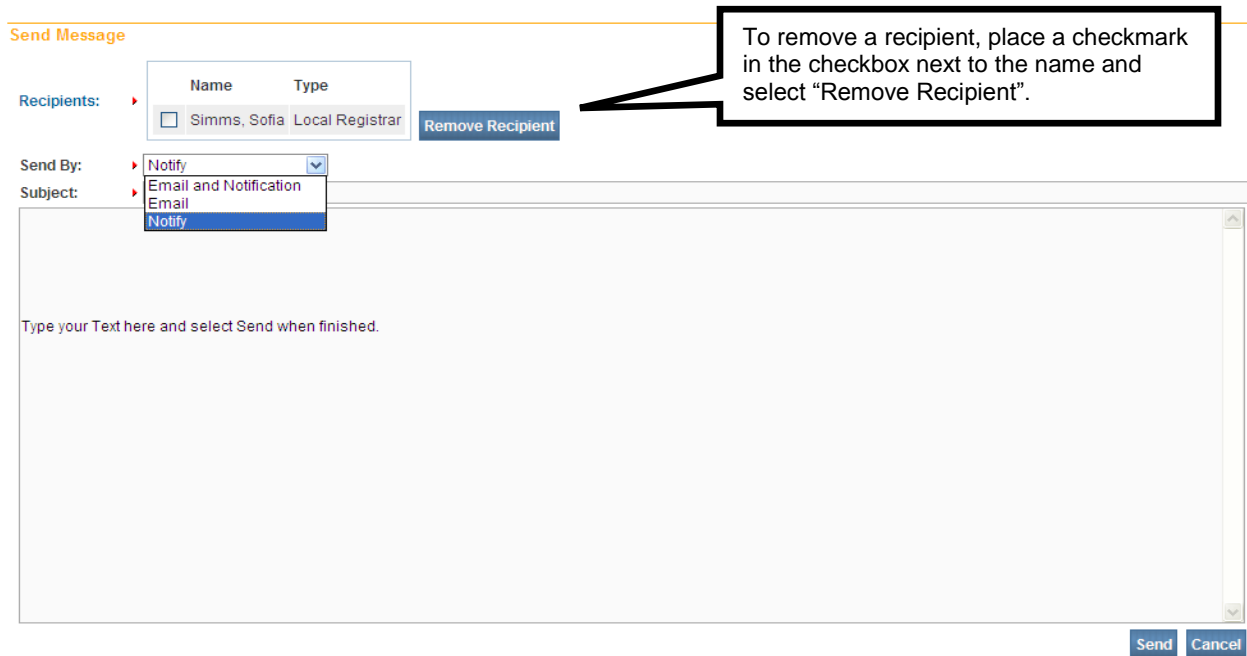


9. Type in the first and last name of the person you wish to send a message to.
10. Select FIND.
11. Place a checkmark in the checkbox next to the name of the person you wish to send a message.
12. Click the “Add” button.





13. Click SAVE. The name(s) will appear near the “**Recipients**” link.



14. To remove a name, place a checkmark in the checkbox next to the name in the **Selected Recipients** section, and click on the **Remove Recipient** button, and click SAVE. The Send Message screen will show you the recipients selected.

15. To send the message, select the Send By dropdown to indicate if the message should be sent using both Email and Notification, Email only or Notify only.

Selecting Notification and/or Notify will send an “internal” message.

16. Type the message in the message box.

17. Select the Send button.

### Exercise 1.3 – Current Activities

**Skill Learned:** Basic navigation within the **Current Activities** pane.

The **Current Activities** is another fast link that displays upon logging into **DAVE™**. Initially, this window is minimized.

1. Select the **Current Activities** link to open or maximize the **Current Activities** window.

Fast Links

Messages Current Activities Issuance Queue Summary Birth Search Order Search Death Search

The **Current Activities** window displays a listing of the **Queues** that contain records requiring immediate attention. (See [Work Queues](#) for more information). In the example below, there are 5 records in the No Services queue. The oldest record in that queue is 1,214 days old.

Current Activities

Queue Name	Count	Age of Oldest in Days
Legacy Record	6	232
Completed	2178	1214
Death No Match	249	1170
Incomplete	46	157
No Services	5	1071
Total Queues : 5		

Queues are based on security privileges.

- Click any of the **Queue Name** links to open the queue and allow access to the records within the queue. The screenshot below shows what the **No Services** Queue looks like when open.

Search by Order Work Queue

Queue: **No Services** Search Type: Value: Display 15 rows per page. Age

Search Show All Rows Clear Return

All	Order Number	Service	Date Received ↓	Priority	Registrant Name	SFN	Event Date	Applicant Name
<input type="checkbox"/>	20101200032		DEC-02-2010		Fernando Hamlet	2010050526	Dec-01-2010	Knowlton & Hewins Funeral Home (Augusta)
<input type="checkbox"/>	20111000792		OCT-26-2011		Ramiro Tankersley	2011052694	Oct-24-2011	Plummer Funeral Home (Augusta)
<input type="checkbox"/>	20111200751		DEC-27-2011		Elsa Vue	2011053629	Dec-23-2011	Knowlton & Hewins Funeral Home (Augusta)
<input type="checkbox"/>	20130701474		JUL-24-2013					Brown Funeral Home
<input type="checkbox"/>	20131000001		OCT-03-2013					Brookings-Smith (Bangor)
Total records : 5								

Actions Assign To Another Queue Add Comments Correspondence Print

- We will look at how to access records in the **DAVE™** application elsewhere in these exercises.
- Click the **Return** button to close this page and return to the **Home** page.

---

## Exercise 1.4 – Change / Forgot Password

**Skill Learned:** How to change your **DAVE™** system password.

The System Administrator will provide you with a password that will enable you to log into **DAVE™**. This is a temporary password that must be changed when you login for the first time.

### Change your password:

1. From the **Home** page, select **Main -> Change Password**. A “Change Password” screen will appear.

Maine Department of Health and Human Services

Time left before your password expires: 119 Days, 9 Hours, 29 Minutes

Old Password:

New Password:

Confirm Password:

Security Question

Security Answer

Save Clear Return

2. Enter your old or temporary password into the **Old Password** text entry box.
3. Enter your new password into the **New Password** text entry box. Passwords must be at least 8 characters in length and contain at least one uppercase letter, one lowercase letter, and one numeric value.
4. Re-enter the new password in the **Confirm Password** text entry box. Note: You must enter the exact same password both times.
5. Click on the Security Question dropdown and select “What is your favorite color?”.
6. Type in the Security Answer.

---

### Change Password

Old Password:

New Password:

Confirm Password:

Security Question

Security Answer

Save Clear Return

- 
7. Click the **Save** button.

**Forgot your Password:**

1. At the Login screen, type in your username.
2. Click the “Forgot your password?” link.



3. Type in your username and code from the image as shown below.

---

**Request New Password**

To reset your password, enter your Username and the characters in the picture below.

Username:



Type the code from the image

4. Select the Next button.
5. At “Please answer your security question below”, type in the answer to the security question you completed earlier in Step 5 above of the “Change Your Password” section.

---

**Request New Password**

Please answer your security question below.

What is your favorite color?

6. Select the Next button.
7. A message will appear stating a temporary password has been sent to your email address.

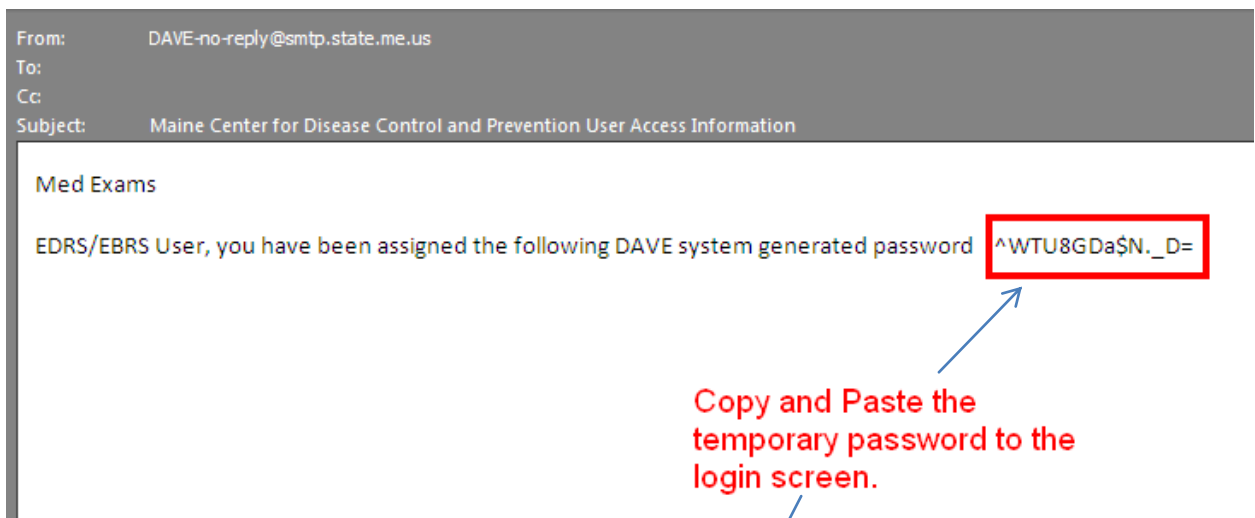
---

**Request New Password**

Password Request Successful. A temporary password has been sent to your email address.

[Continue](#)

8. Select Continue.
9. You will be returned to the Login screen.
10. Retrieve the automated email message with the temporary password.



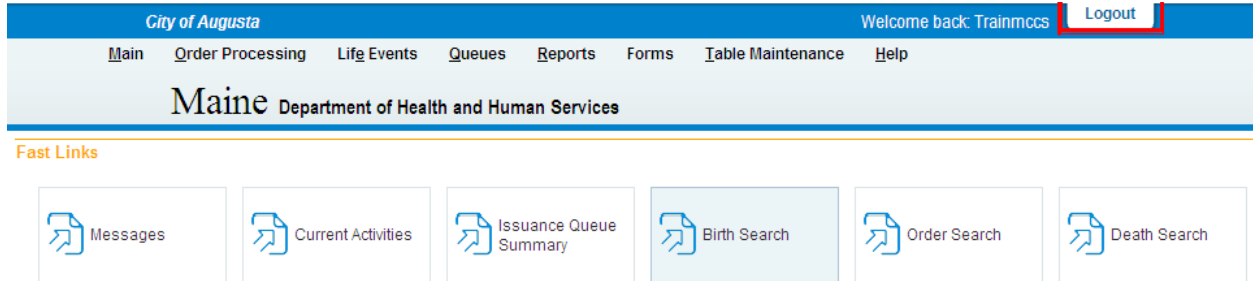
11. Copy and paste (or type in) the temporary password onto your login screen.



## Exercise 1.5 – Logging out of DAVE™

**Skill Learned:** How to Log out of the DAVE™ application.

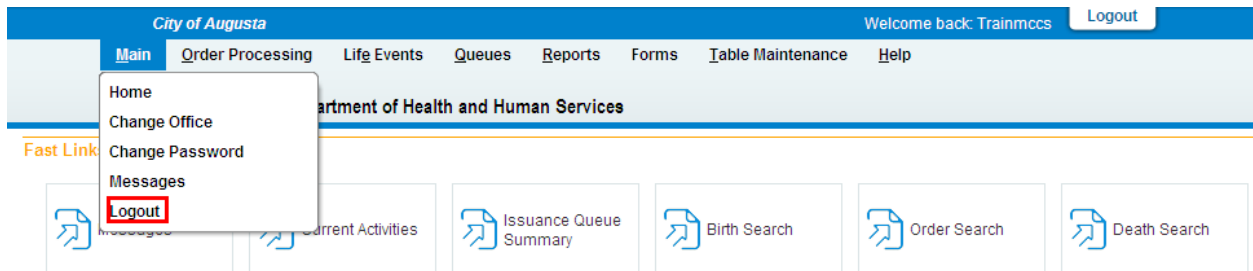
1. Locate and select the **Logout** button in the upper right corner of the home DAVE™ page.



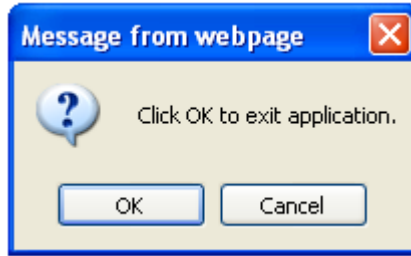
2. DAVE™ will return you to the Login screen.



3. Another way to Logout from DAVE™ is to select **Logout** from the **Main Menu** on the **Home** page.



4. DAVE™ will prompt you to make sure you intend to exit the system. Click **OK** to logout of DAVE™ or **Cancel** to remain in the application.



5. **DAVE™** will return you to the Login screen. Key in your Username and Password to return to the application.

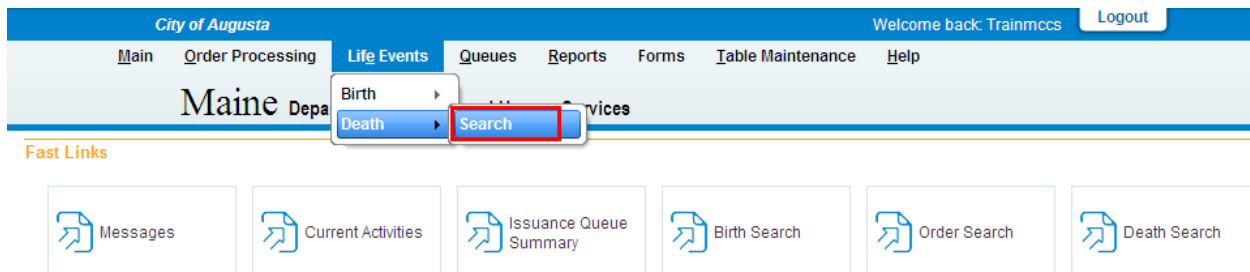


## Section 2: Searching for Cases in DAVE™

### Exercise 2.1 – Search by Identifier

**Skill Learned:** How to search for cases in **DAVE™** using pre-defined identifiers.

1. From the **Home** page select **Life Events -> Death -> Search**.



- There are two search options: **Search by Identifier** OR **Search by Registrant or Data Provider**.

City of Augusta | Welcome back: Trainmccs | Logout

Main | Order Processing | **Life Events** | Queues | Reports | Forms | Table Maintenance | Help

Maine Department of Health and Human Services

Search for a death record

**Search by Identifier:**

Enter one of these items

File Number: Year:

Number:

Case Id:

ME Case Number:

Medical Record Number:

File Date:

Date of Death: Start:

End:

Place of Death Location Type:

Place of Death:

Maximum records to display:

OR

**Search by Registrant or Data Provider:**

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

First Search Person/Organization

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:

End:

- The **Search by Identifier** function, when used in conjunction with a **File Number**, **Case Id**, **ME Case Number**, or **Medical Record Number** will always return a single record.

To **Search by Identifier**, enter any of the identifiers highlighted here. In this example, we are searching based on **Case Id** number 38191.

Search for a death record

**Search by Identifier:**

Enter one of these items

File Number: Year:

Number:

Case Id:

ME Case Number:

Medical Record Number:

File Date:

Date of Death: Start:

End:

Place of Death Location Type:

Place of Death:

Maximum records to display:

OR

**Search by Registrant or Data Provider:**

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

First Search Person/Organization

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:

End:

- Click the **Search** button at the bottom of the page to execute the search and display the Search Results page.



Search Soundex Swap Names Clear

Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
38191		Bayou, Al	Nov-05-2013	Male	Kennebec	Jun-02-1911	Preview
							Total records : 1

New Search

**Note: Search by Identifier will work only when you know specific, record related data. If you do not know this type of information, then use the Search by Registrant or Data Provider option.**

In the example above, we used the **Search by Identifier** function to find a record based on its **Case ID**. Please review the screen shot below for other identifiers that can be used to locate records:

**Search by Identifier:**  
Enter one of these items

File Number: Year:   
Number:

Case Id:

ME Case Number:

Medical Record Number:

File Date:

Date of Death: Start:   
End:

Place of Death Location Type:

Place of Death:

Maximum records to return:

A **File Number** is composed of two elements: Year and Number. Year represents the year in which the event occurred. Number is the unique number assigned to the record.

**ME Case Number** is the unique number assigned to a record by a medical examiner. Not all records have an ME case number.

If the registration in question has a known, unique **Medical Record Number**, you may search for that by entering it here.

When searching by **File Date**, all records on which registration is accepted for approval on that date will be returned.

By using both a **Start** and **End** date you can search for cases with a Date of Death that falls within that range. If only a **START** date is used, then only exact matches will be returned.

**Place of Death Location Type** is used in conjunction with the **Place of Death** field. The selection made here will determine the choices available in the Place of Death field.

The choices available from the **Place of Death** field are based on the selection made in the Place of Death Location Type above.

For example, if **City or Town** is selected in **Place of Death Location Type**, then clicking the Place of Death lookup button will display a list of cities from which to choose.

---

For all of these searches, once you have entered the search criteria, click the **Search** button to proceed.

### Exercise 2.2 – Search by Registrant or Data Provider

**Skill Learned:** How to use the data entry fields on the right side of the **Search** page to search for cases using decedent criteria, provider criteria, or a combination of the two.

The **Search by Registrant or Data Provider** functionality uses tab controls to contain search parameters. When you first access the search page, only one search tab is available: **First Search Person/Organization**. Later, we will use the **More** button to add additional search tabs.

1. From the **Person/Organization** dropdown list, select **Decedent**.

**Search by Registrant or Data Provider:**  
Enter one or more persons/organizations. Last name is required.

---

**First Search Person/Organization**

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:  End:

**More**

**Search** **Soundex** **Swap Names** **Clear**

2. Enter the decedent **First** and **Last** name in their corresponding fields.
3. Click the **Search** button to execute the search and retrieve matching records.
4. If only one entry matching our search criteria exists in the database, only one case will appear in the **Search Results** box.

Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
38191		Bayou, Al	Nov-05-2013	Male	Kennebec	Jun-02-1911	<a href="#">Preview</a>

Total records : 1

[New Search](#)

5. However, what if you do not know the decedent's name? What if you know only the decedent's **Last** name and gender, but you also know the name of the decedent's father? In this case, you can search using the decedent's last name AND the decedent's father's name. From the **Person/Organization** dropdown list, select **Decedent** and then type the decedent's **Last** name.

Search by Registrant or Data Provider:

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

First Search Person/Organization

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:  End:

Search by Last Name

[More](#)

[Search](#) [Soundex](#) [Swap Names](#) [Clear](#)

---

**Search by Registrant or Data Provider:**

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

**First Search Person/Organization**

Person/Organization:  ▼



First:

Middle:

Last:

Gender:  ▼

SSN:

Date of Birth: Start:   End:  

Search by Father's name

**More**

6. Locate and click the **More** button. A **Second Search Person/Organization** tab will appear.

Search by Registrant or Data Provider:

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

First Search Person/Organization

Person/Organization: Decedent

First:

Middle:

Last: Br%

Gender:

SSN:

Date of Birth: Start:  End:

A search can also be done using a Wild Card (%). A minimum of two characters is required. See Exercise 2.3.

Second Search Person/Organization

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:  End:

More

7. In the **Second Search Person/Organization** section, select **Father** from the **Person/Organization** dropdown list, enter the decedent's father's **First** name "John", and **Last** name "Bayou".
8. Click the **Search** button. The result of this search will be any decedent where the Last name = "Bayou" and a father whose full name = "John Bayou".

**Note: The More button can be used to add multiple search entities. Adding multiple search entities will help narrow the list of results returned. However, adding too many entities can result in no results being returned.**

9. As a general rule, build your searches to be as specific as possible to minimize the number of entries found. In this case, only the expected record was returned.

Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
38191		Bayou, Al	Nov-05-2013	Male	Kennebec	Jun-02-1911	Preview

Total records : 1

New Search

### Exercise 2.3 – Wild Card Searches

**Skill Learned:** How to perform **Wild Card Searches**. Sometimes you may not be sure of the spelling of a name or maybe you only have a partial piece of information to use to locate a record. In these cases, **Wild Card Searches** can be used to locate records.

**Note: Wild Cards are used to represent any missing or unknown text value when searching for records.**

**Wild Card searches will work only when using Search by Registrant or Data Provider. They will not work with Search by Identifier.**

Search by Registrant or Data Provider:

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

First Search Person/Organization

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:  End:

More

1. Using the input from the **Search by Registrant or Data Provider** section, input the information that you do have followed by a “%” sign. In this example, we were not sure of the spelling of decedent’s first name or last name, but we did know that the first name begins with the letter “A” and the last name begins with the letters “Ba”.

**Note: When doing a Wild Card search on Last name the first two characters of the last name is required. For example (Ba%).**

2. Type in “A” in the first name field followed by a percent sign (%). Type in “Ba”, in the Last name field followed by a percent sign (%).
3. In this case, the percent sign (%) sign tells **DAVE™** that we want to view all records with decedent’s whose first name starts with “A” and whose last name starts with “Ba”.
4. Click the **Search** button to execute this search and view the records returned.

- Again, build your searches carefully so that they return the fewest number of records possible while still returning the desired record.

#### Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
38191		Bayou, Al	Nov-05-2013	Male	Kennebec	Jun-02-1911	<a href="#">Preview</a>
							Total records : 1

[New Search](#)

### Exercise 2.4 – Soundex Searches

**Skill Learned:** Use of **Soundex** to search for cases when the exact spelling of a name is unknown. The **Soundex** button is located at the bottom of the main search page next to the **Search** button.



- From the main search page enter a partial name or sound-alike name into the **First** and **Last** name box under **Search by Registrant or Data Provider**.

In this example, the name we are looking for is “Quincy Adams”. However, using **Soundex** we should be able find the case using a sound-alike name of “Quency Aadams”.

- Next, click the **Soundex** button, instead of the **Search** button.

### Search by Registrant or Data Provider:

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

#### First Search Person/Organization

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:  End:

The actual name we are looking for is "Quincy Adams". Using "Soundex" we can find it even if we used the incorrect spelling "Quency Aadams".

[More](#)

[Search](#) [Soundex](#) [Swap Names](#) [Clear](#)

3. Notice that, even though we used an incorrect spelling, **Soundex** was able to find the registration we were looking for.

Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
38205		Adams, Quincy	Nov-07-2013	Male			<a href="#">Preview</a>

Total records : 1

[New Search](#)

4. Additionally, **Soundex** can also be used to search for Decedents, Funeral Homes, Funeral Directors, or any combination of Persons and/or Organizations even when both names have been misspelled.

Note: Similar to Wild Cards, Soundex searches cannot be used with Search by Identifier.

### Exercise 2.5 – Swap Names

**Skill Learned:** How to use the **Swap Names** feature to search for cases when there is some ambiguity between the First and Last names. The **Swap Names** button is located at the bottom of the main search page next to the **Soundex** button.

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 retrieve a record.



---

In the example shown here, we are searching for a decedent named **Kim Po**. However, based on information we received from an applicant we have used **Po** as the **First** name and **Kim** as the **Last Name**.

1. Clicking the **Search** button and initiating a standard search did not return the desired record.

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

---

**First Search Person/Organization**

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:  End:

Using Swap Names we can find the record.

---

**Search Results**

There are no records that match the criteria you have entered.

2. However, using the same search criteria we can find the record by using the **Swap Names** feature.

Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
38206		Po, Kim	Nov-07-2013	Female			<a href="#">Preview</a>

Total records : 1

[New Search](#)

**Note: Like Wild Cards and Soundex, Swap Names cannot be used with Search by Identifier.**

**Exercise 2.6 – Search Results**

**Skill Learned:** How to examine the results of your searches and access death records once you have found them.

**Search by Registrant or Data Provider:**  
Enter one or more persons/organizations. Last name is required.

---

**First Search Person/Organization**

Person/Organization:

First:

Middle:

Last:

Gender:

SSN:

Date of Birth: Start:

End:

[More](#)

[Search](#) [Soundex](#) [Swap Names](#) [Clear](#)

1. In this example, we are conducting a Wild Card search for all records with decedent's whose Last name begins with the letter "Sm".

2. This search returned the 71 records shown below.

Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
2336	2011051267	Small, Chasity	Jul-10-2011	Female	Cumberland	Apr-30-1924	<a href="#">Preview</a>
25930	2012509633	Small, Donte	Nov-30-2012	Male	Cumberland	May-12-1921	<a href="#">Preview</a>
30692	2013503302	Small, Jennifer	Mar-23-2013	Female	Hancock	Feb-06-1941	<a href="#">Preview</a>
16549	2011001068	Small Jr., Roger	Jan-29-2011	Male	York	Nov-15-1917	<a href="#">Preview</a>
6440	2011004118	Small, Yaritza	May-10-2011	Female	Sagadahoc	Mar-26-1939	<a href="#">Preview</a>
31498	2013503878	Smalley Sr., Geovanni	Apr-14-2013	Male	Cumberland	Dec-17-1934	<a href="#">Preview</a>
17996	2011007918	Smalley, Peyton	Oct-27-2011	Female	Cumberland	Jul-19-1925	<a href="#">Preview</a>
14750	2012502402	Smalley, Tess	Apr-07-2012	Female	Kennebec	Aug-05-1947	<a href="#">Preview</a>
33687	2013505831	Smalls, Alina	Jun-09-2013	Female	Androscoggin	Feb-14-1928	<a href="#">Preview</a>
13407	2011002546	Smalls, Branson	Mar-20-2011	Male	Kennebec	Mar-20-1937	<a href="#">Preview</a>

First 1 2 3 4 5 6 7 8 Last Total records: 171

[New Search](#)

3. Notice that if you hover over the column headers in the results page, [underlined links](#) will appear. These links allow you to change the sort order of the **Results** page. This can be very helpful in locating the specific record that you are looking for. In the example below, we have changed the sort order by clicking the **Decedent's Name** column header:

Search Results

Case Id	SFN	<a href="#">Decedent's Name ↓</a>	Date of Death	Gender	Place of Death	Date of Birth	
2336	2011051267	Small, Chasity	Jul-10-2011	Female	Cumberland	Apr-30-1924	<a href="#">Preview</a>
25930	2012509633	Small, Donte	Nov-30-2012	Male	Cumberland	May-12-1921	<a href="#">Preview</a>

### Exercise 2.7 – Preview

**Skill Learned:** How to preview a record prior to opening it.

1. Still not sure if you have located the desired record? Simply locate and click the [Preview](#) link in any of the search result entries. This will generate a **Preview** page of that particular registration.

Search Results

Case Id	SFN	Decedent's Name ↓	Date of Death	Gender	Place of Death	Date of Birth	
2336	2011051267	Small, Chasity	Jul-10-2011	Female	Cumberland	Apr-30-1924	Preview
25930	2012509633	Small, Donte	Nov-30-2012	Male	Cumberland	May-12-1921	Select
30692	2013503302	Small, Jennifer	Mar-23-2013	Female	Hancock	Feb-06-1941	Preview
16549	2011001068	Small Jr., Roger	Jan-29-2011	Male	York	Nov-15-1917	Preview
6440	2011004118	Small, Yaritza	May-10-2011	Female	Sagadahoc	Mar-26-1939	Preview
31498	2013503878	Smalley Sr., Giovanni	Apr-14-2013	Male	Cumberland	Dec-17-1934	Preview
17996	2011007918	Smalley, Peyton	Oct-27-2011	Female	Cumberland	Jul-19-1925	Preview
14750	2012502402	Smalley, Tess	Apr-07-2012	Female	Kennebec	Aug-05-1947	Preview
33687	2013505831	Smalls, Alina	Jun-09-2013	Female	Androscoggin	Feb-14-1928	Preview
13407	2011002546	Smalls, Branson	Mar-20-2011	Male	Kennebec	Mar-20-1937	Preview

First 1 2 3 4 5 6 7 8 Last Total records : 71

New Search

Preview

File Number: 2012509633 File Date: Dec-04-2012  
Case Id: 25930 Medical Record Number: ME Case Number:  
Decedent's Name: Donte Small Date of Death: Nov-30-2012  
Spouse's Name: Marital Status: Widowed  
Gender: Male Date of Birth: May-12-1921 SSN: None  
City or Town of Death: Scarborough County: Cumberland  
Place of Death: Gosnell Memorial Hospice House  
Residence: Kennebunk Maine, United States  
Mother's Maiden Name: Donte Justice  
Funeral Director: uwdrlyn Kevin kwgdgh  
Funeral Home: Bibber Memorial Chapel (Kennebunk), 67 Summer, Kennebunk  
Medical Certifier: qsmpl A aqmol  
Date Entered: NOV-30-2012 Last Update Made By: pljcz J clmrdgk  
Status: /Personal Valid With Exceptions/Medical Valid/Registered/Signed/Certified/NA

- 2. Once you have previewed the registration and are sure that you have located the correct record, click the decedent's name to open the actual record.
- 3. You should now see the first page on the registration (record) – **Decedent**.

Death Registration Menu 6476 2011003547 :Maya Brace Apr-14-2011  
/Personal Valid/Medical Valid/Registered/NA/NA/NA

Personal Information Decedent

Resident Address  
Family Members  
Informant  
Disposition  
Decedent Attributes

Medical Certification  
Pronouncement  
Place of Death  
Cause of Death  
Other Factors  
Certifier

Registrar  
Identifiers

Other Links  
Assign Status  
Attachments  
Comments  
Correspondence  
Event and Issuance History  
Print Forms  
Validate Registration  
Switch User

Decedent's Legal Name  
Prefix First Middle Other Middle Last Suffix  
Maya Brace

Aliases  
Add/Edit Alias Names

Gender: Female Social Security Number: 000-00-0000  
None Unknown

Date of Birth: Apr-11-1929 Age: 82  
Under 1 Year Under 1 Day  
Months Days Hours Minutes  
Verify SSN UNVERIFIED (0)

Decedent's Birth Place  
City or Town State Country  
Bar Harbor Maine United States

Ever in US Armed Forces? No

Validate Page Next Clear Save Return

Click the Next button to move to the next page - "Resident Address". Or, click on the links in the Death Registration Menu.

## Section 3: Page Controls and Features

### Exercise 3.1 – Dropdown Lists

**Skill Learned:** How to navigate through **DAVE™** using the various field and icons.

Dropdown lists provide you with a pre-defined list of choices. This eliminates the need to manually type in data, prevents inappropriate data from being entered, and prevents spelling errors.

1. One of the first dropdown lists you are likely to encounter is the **ID Type** dropdown list on the **New Order/Applicant** page. To view all options in the list, click the down-arrow on the right side of the field.

City of Augusta Welcome back: Trainmccs Logout

Main **Order Processing** Life Events Queues Reports Forms Table Maintenance Help

Department of Health and Human Services

New Order

Person  Organization ID Type:  Other:   Expedite Order

Name

Prefix  First  Middle  Last  Suffix

Applicant Address

Street Number  Pre Directional  Street Name  Street Designator  Post Directional  Apartment Number

City or Town  State  Country  Zip Code

Shipping Information

Contact Information

Eligibility

Applicant Relationship:  Other Specify:



ID Type:

- Alternate ID
- Employment ID
- Government ID
- Medicaid ID
- Military ID
- Naturalization Certificate
- Non-Driver License
- Prison ID
- Social Services ID
- Student ID
- U.S. passport
- Valid Driver License

2. Notice that clicking the down arrow will reveal the list of options that can be selected from to populate the field. Some dropdown lists will have more selectable options than can be displayed on one page. In those cases, a scroll bar will appear on the left side of the list.
3. Once the list is highlighted, it is possible to navigate up and down through the list using the directional arrow keys on your keyboard.

### Exercise 3.2 – Lookup Controls






**Skill Learned:** How to use **Lookup Controls** that launch **Lists of Values** that display a grid of selectable data.

1. On the **Death Record Search** page shown in the example below, locate the **Lookup** button. The **Lookup** control appears onscreen sometimes as a magnifying lens (  ) and other times as an ellipsis, (  ). Click the **Lookup** control to launch the **List of Values** search field.

#### Search for a death record

##### Search by Identifier:

Enter one of these items

File Number:	Year:	<input type="text"/>
	Number:	<input type="text"/>
Case Id:		<input type="text"/>
ME Case Number:		<input type="text"/>
Medical Record Number:		<input type="text"/>
File Date:		<input type="text"/> 
Date of Death:	Start:	<input type="text"/> 
	End:	<input type="text"/> 
Place of Death Location Type:		<input type="text"/> 
Place of Death:		<input type="text"/> 

Click on the ellipsis to launch the List of Values search field.

2. In this example, the list that appears is a list of cities for the Place of Death. Enter the first few letters of the city you are searching for followed by the Wild Card character, (%). Clicking **Search** will return a list of all potentially matching cities containing the same characters entered.

Place Search

City Name Au% Search Reset

3. The **List of Values** (LOV) control below lists all of the cities in the system containing the characters “Au”. Click the [Select](#) link next to any corresponding names to auto-populate the Place of Death field.

Place Search

City Name Au% Search Reset

Auburn	select
Augusta	select
Aurora	select
East Auburn	select
Isle au Haut	select
New Auburn	select
North Auburn	select
Pauls	select
Saunders	select
West Auburn	select
Winkumpaugh Corners	select

Clear Cancel

### **Exercise 3.3 – Clear Data Controls**

**Skill Learned:** In the previous exercise, we saw how to use the **Lookup** control to quickly locate a facility and enter that facilities’ data into a record. The **Clear** button is used to clear data from a page.

1. Locate and click the **Clear** button.

## Search for a death record

### Search by Identifier:


Enter one of these items



File Number: Year:   
Number:


Case Id:


ME Case Number:

Medical Record Number:

File Date:  

Date of Death: Start:    
End:  

Place of Death Location Type:  


Place of Death:  

OR

### Search by Registrant or Data Provider:

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


#### First Search Person/Organization

Person/Organization:  



First:

Middle:

Last:

Gender:  

SSN:

Date of Birth: Start:    
End:  

More

Maximum records to display:

[Search](#) [Soundex](#) [Swap Names](#) [Clear](#)

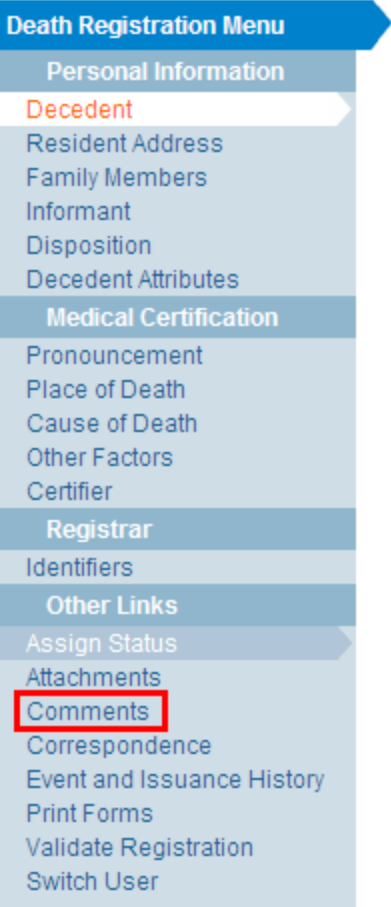
- The Clear button clears all data entered on the page since the last save action.

## Section 4: Other Links

### Exercise 4.1 – Comments

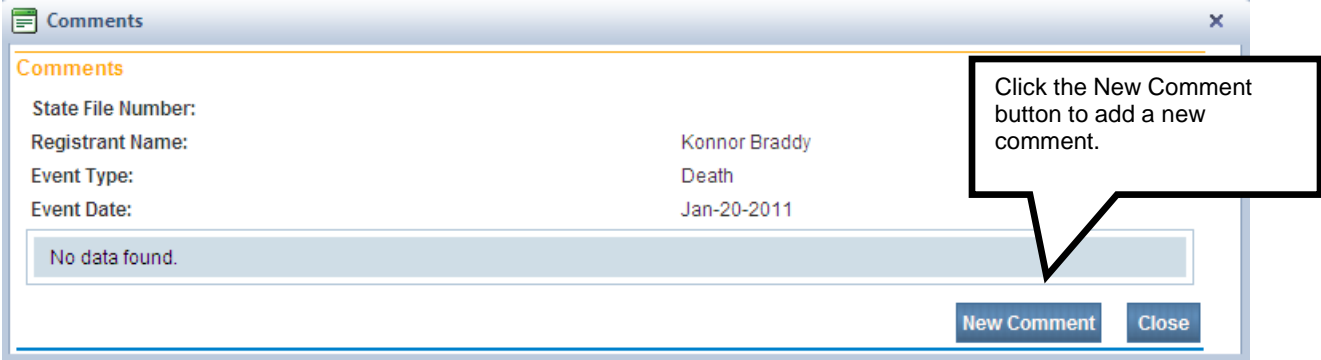
**Skill Learned:** How to read and enter comments. During the process of viewing death records, it is sometimes necessary to store comments or remarks about a case. These comments can serve as reminders or as instructions to others who will work on the case.





1. From the **Death Registration Menu** select **Other Links -> Comments**.

2. The **Comments** dialog will appear onscreen as a pop-up window. To add a new comment, click the **New Comment** button located at the bottom of the **Comments** window.



3. The **Enter New Comment** tab will open allowing you to enter new comments.
4. The first step in adding a new comment is to select a **Comment Type**. Every comment must have a type assigned to it.

Comments

State File Number:

Registrant Name: Konnor Braddy

Event Type: Death

Event Date: Jan-20-2011

No data found.

**Enter New Comment**

Comment Type:

General Comments  
Order Processing  
Late Filing Reason  
Event

Comment:

Save  
Clear  
Cancel

Maximum text length: 4000 Characters left: 4000

New Comment Close

To add a comment select the dropdown button to select a comment type.

Maximum number of characters that can be included in a comment.

Number of remaining characters that can be added to the current comment.

5. Comments are limited to 4000 characters. Fortunately, **DAVE™** keeps track of the number of characters used and displays that information onscreen.
6. When you have finished entering the comment, select the **Save** button to save the comment, **Clear** to clear the entry, or **Cancel** to close the comment window without saving changes.
7. Selecting **Save** above will write the comment to the **DAVE™** database and return you to the main **Comments** window, shown below. Notice that a portion of the comment can be read in the **Comment** window. Lengthy comments will have to be opened in order to be read in their entirety. Clicking the [Edit](#) link will open the **Update Existing Comment** tab for you to view and, if necessary, edit the comment.

**Comments**

State File Number:  
 Registrant Name: Konnor Braddy  
 Event Type: Death  
 Event Date: Jan-20-2011

Comment Type	Date Entered	Entered By	Comment	
General Comments	11/08/2013	Trainmccs	This is an Exercise Training test.	<a href="#">Edit Delete</a>

Total records : 1

[New Comment](#) [Close](#)

**Note: The ability to Edit or Delete comments is determined by the individual user's security configuration.**

- Once a comment has been added to a record, a checkmark will appear next to the **Comments** link in the **Other Links** sub-menu. This serves as a visual cue to all users that outstanding comments exist on a record.

**Death Registration Menu** 803 :Konnor Braddy Jr Jan-20-2011  
 /Personal Valid/Medical Invalid/Not Registered/Signed/Uncertified/NA

**Decedent**

Decedent's Legal Name

Prefix First Middle Other Middle Last Suffix  
 [ ] [Konnor] [ ] [ ] [Braddy] [Jr]

**Aliases**

Add/Edit Alias Names

Gen [Ma] SSN Verification Status UNVERIFIED (0)  
 Verify SSN

Cit [Houlton] [Maine] [United States]

Ever in US Armed Forces? [No]

**Other Links**

- Assign Status
- Attachments
- Comments**
- Correspondence
- Event and Issuance History
- Print Forms
- Validate Registration
- Switch User

[Validate Page](#) [Next](#) [Clear](#) [Save](#) [Return](#)

### Exercise 4.2 – Print Forms –Working Copy

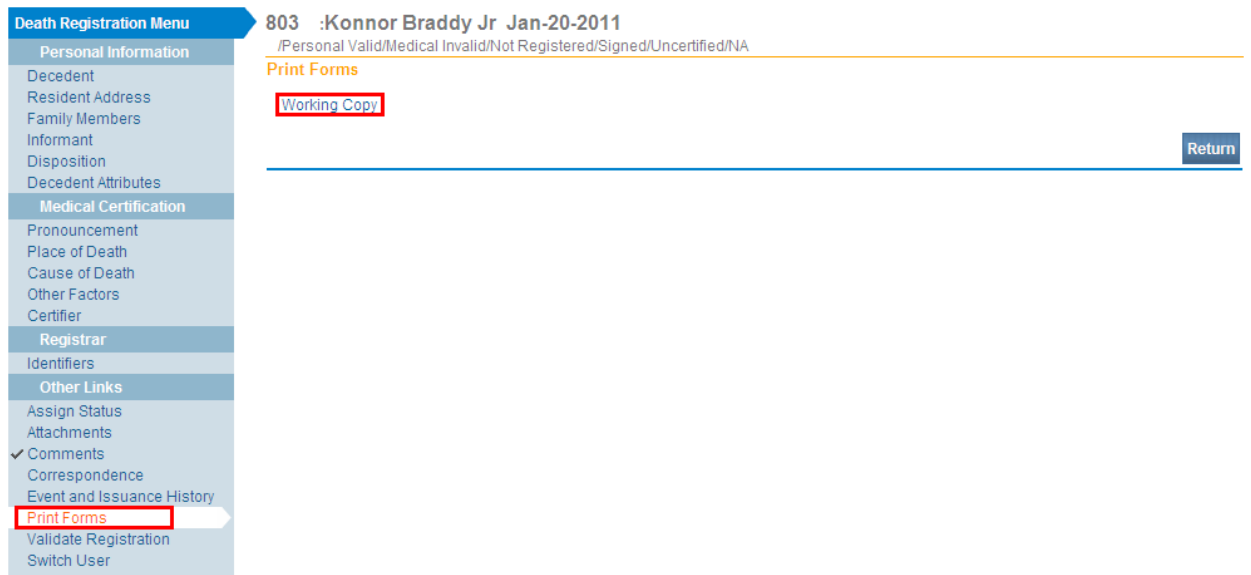
**Skill Learned:** How to send working copies of certificates to an installed printer.

---

**Note: Access to the various Print Forms in DAVE™ is based on user role and security setup. Individual access to this and other forms may be restricted.**

**Note: The ability to print a Working Copy of a registration is based on user security privileges.**

1. From the **Death Registration Menu**, select **Other Links -> Print Forms**.
2. Locate the [Working Copy](#) link.



3. Clicking the Working Copy link will open the **File Download** dialog box.
4. Click Open.

Death Registration Menu 803 :Konnor Braddy Jr Jan-20-2011  
 /Personal Valid/Medical Invalid/Not Registered/Signed/Uncertified/NA

Print Forms  
[Working Copy](#)

Return

**File Download**

Do you want to open or save this file?

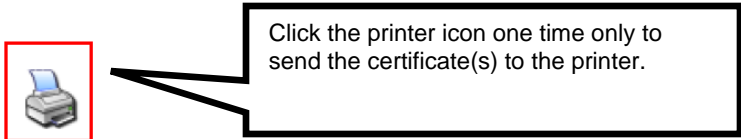
Name: WorkingCopy.pdf  
 Type: Adobe Acrobat Document, 210KB  
 From: gatewaytest.maine.gov

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

5. Click the Printer icon at the top of the certificate.

**Note: Click the printer icon only one time. This will print all copies of the certificate.**



NAME KNOWN TO PHYSICIAN		DEPARTMENT OF HEALTH AND HUMAN SERVICES						State File Number		
CERTIFICATE OF DEATH										
DECEDENT	1a. FIRST NAME Konnor		1b. MIDDLE NAME			1c. LAST NAME Braddy		1d. JR., etc. Jr		
	2. DATE OF DEATH January 20, 2011	3. SEX Male	4. SOCIAL SECURITY NUMBER 000-00-0000	5a. AGE (Yrs) 101 Last Birthday	5b. UNDER 1 YEAR Months: Days:	5c. UNDER 1 DAY Hours: Minutes:	6. DATE OF BIRTH May 27, 1909			
	7. BIRTHPLACE Houlton, Maine			8. WAS DECEDENT EVER IN U.S. ARMED FORCES? No		9. PLACE OF DEATH				
	10. FACILITY NAME				11. COUNTY OF DEATH Unknown		12. CITY OR TOWN OF DEATH Unknown			
	13. MARITAL STATUS Widowed		14. SURVIVING SPOUSE/PARTNER		15. DECEDENT'S USUAL OCCUPATION Asst. Chief Mech. Officer		16. KIND OF BUSINESS / INDUSTRY railroad			

**Exercise 4.3 – Print Forms – Disposition Permit**

**Skill Learned:** How to print a **Disposition Permit** from the **Print Forms** menu. When completed, this form serves as a disposition permit for the remains of the deceased.

**Note: Access to the various Print Forms in DAVE™ is based on user role and security setup. Individual access to this and other forms may be restricted.**

1. From the **Death Registration Menu**, select **Other Links -> Print Forms**.

## Death Registration Menu

### Personal Information

Decedent  
Resident Address  
Family Members  
Informant  
Disposition  
Decedent Attributes

### Medical Certification

Pronouncement  
Place of Death  
Cause of Death  
Other Factors  
Certifier

### Registrar

Identifiers

### Other Links

Assign Status  
Attachments  
Comments  
Correspondence  
Event and Issuance History  
**Print Forms**  
Validate Registration  
Switch User

6476 2011003547 :Maya Brace Apr-14-2011

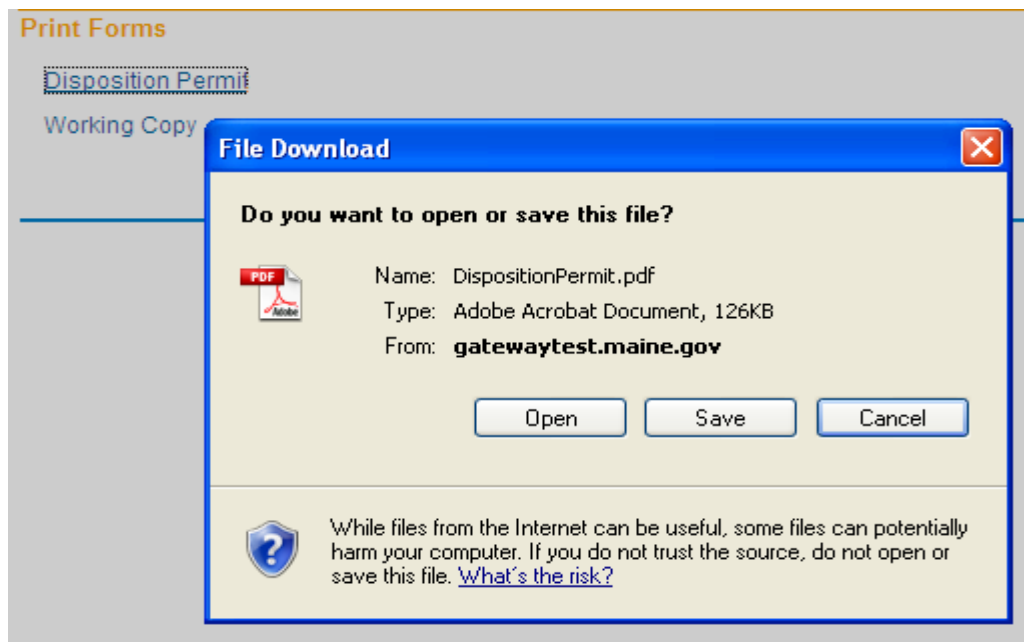
/Personal Valid/Medical Valid/Registered/NA/NA/NA

### Print Forms

**Disposition Permit**

Working Copy

2. From the **Print Forms** page, select **Disposition Permit**.
3. Selecting any document from the **Print Forms** page will launch the **File Download** window, shown below. Select the **Open** button.



- The **Disposition Permit** form will load. The form can be printed as normal by sending the PDF file to any local or network printer.

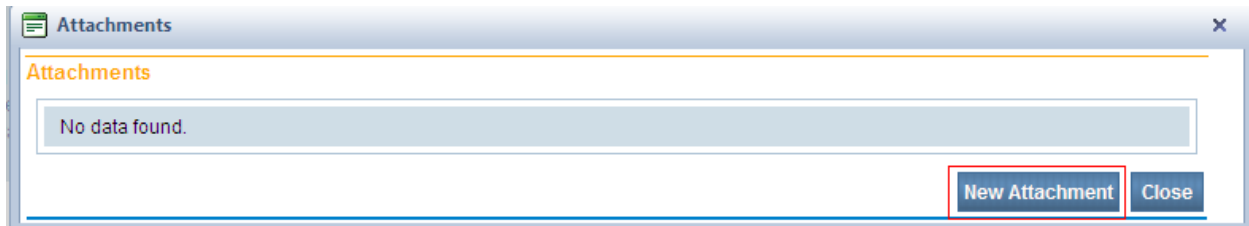
**Exercise 4.4 – Attachments**

**Skill Learned:** How to add attachments. It is sometimes necessary to attach documents to a case. If the attachment is too large, reduce the size of the document in your copier. Scan the attachment and save it to your computer directory prior to attaching the document to the case.

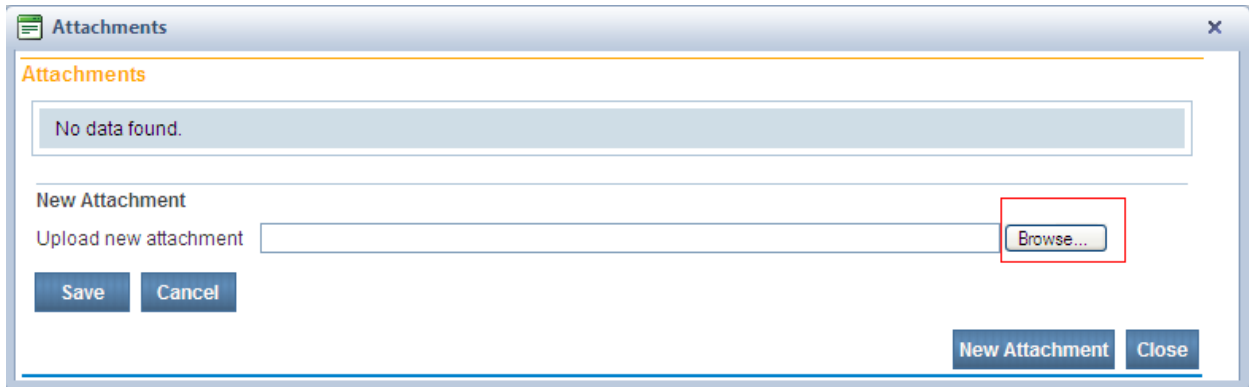
**Note: There is a 4MB size limitation on attachments.**

- Scan the document and save to your computer file directory.
- Open the case the attachment belongs to.
- From the **Death Registration Menu** select **Other Links ->Attachments**

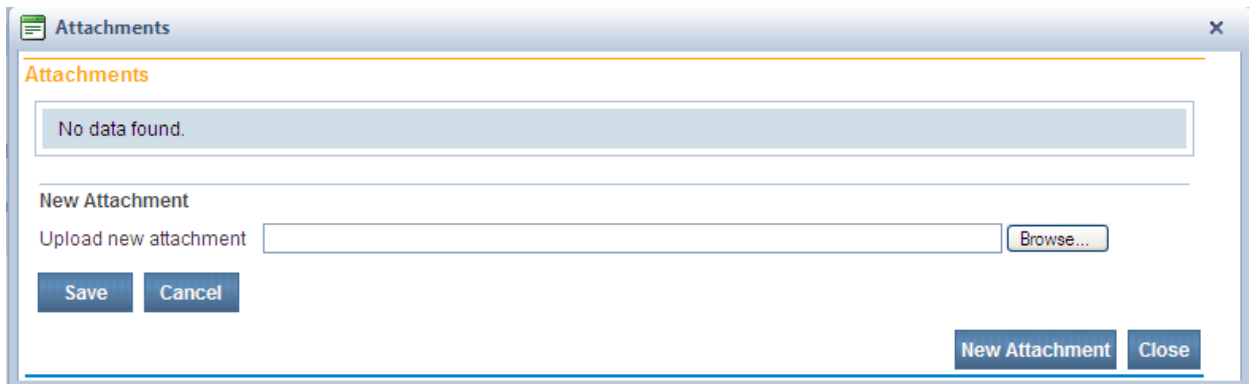
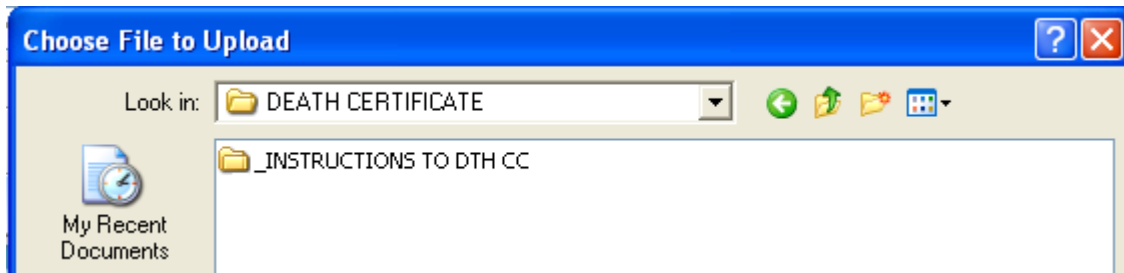
- The **Attachments** dialog box will open.
- Select the **New Attachment** button.



6. The Attachment tab will open allowing you to add an attachment.
7. Click on the Browse button.

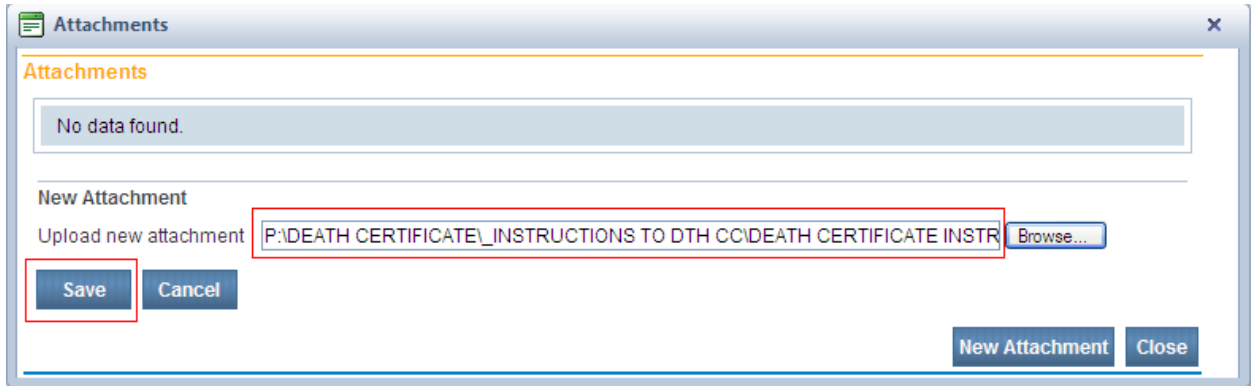


8. Clicking on the Browse button will open the Choose File to Upload directory.
9. Click on the file that should be attached to the record.

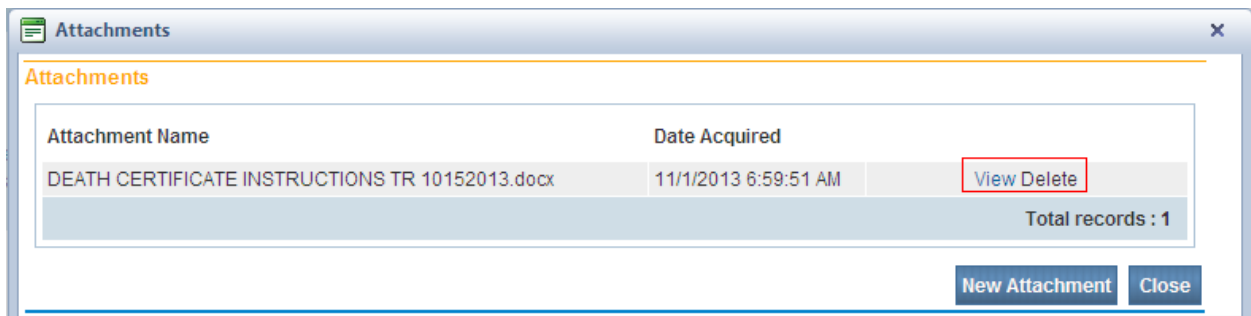


10. The file name will show in the Upload new attachment box.
11. Select Save.

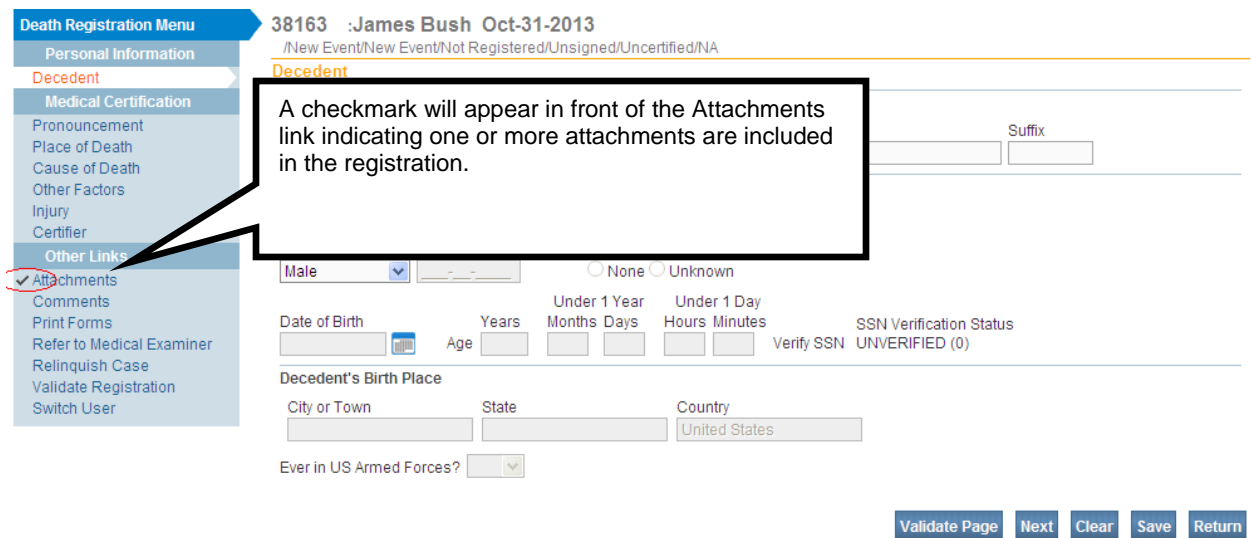




- Once the file is saved, the attachment can be viewed or deleted. (This is based on user security privileges.)



- A checkmark indicator will be shown in front of the Attachments link when there is an attachment included with the case.



## Section 5: Work Queues – Order Work Queue

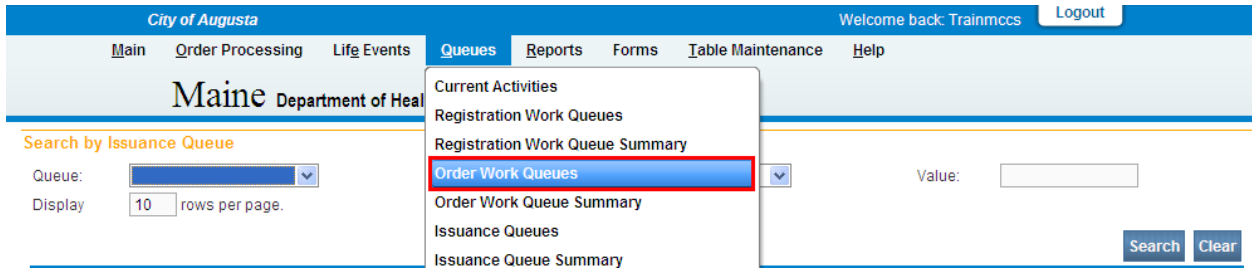
In this section, you will learn how to navigate through **DAVE™** work queues. From the **Home** page, select **Queues**. Queues are used to group death cases together based on the amount of work that has been done with them and the amount of work that still needs to be done. This grouping is accomplished through the assignment of work queue statuses based on validation rule failures.

**Note: The actual work queues available will vary based on user type and user security setup.**

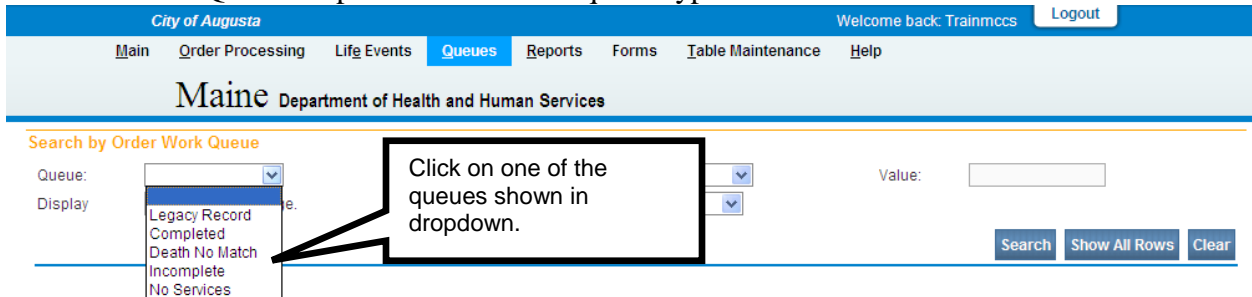
### Exercise 5.1 – Order Work Queue

**Skill Learned:** How to access Order Work Queues.

1. From the **Home** page, select **Queues**.
2. Select **Order Work Queues**.



3. From the Queue dropdown list select a queue type.



In the example below, we have selected the “Incomplete” queue. A list of all the “incomplete” orders will appear.

Search by Order Work Queue

Queue:  Search Type:  Value:   
Display:  rows per page. Age:

All	Order Number	Service	Date Received ↓	Priority	Registrant Name	SFN	Event Date	Applicant Name
<input type="checkbox"/>	20130600063		2013					Plummer Funeral Home (Augusta)
<input type="checkbox"/>	20130601082	Death Certified Copy	JUN-18-2013	REGULAR				anne mulville

Incomplete orders.

4. Click on the Order Number to open the Order Summary page.

City of Augusta Welcome back: Trainmccs Logout

Main Order Processing Life Events Queues Reports Forms Table Maintenance Help

Maine Department of Health and Human Services

Order Processing Menu

- Applicant
- Match Events
- Services
- Payments
- Summary
- Validate Order
- Print Forms
- Attachments
- Switch User

20130600063 :Plummer Funeral Home (Augusta)  
/Order Invalid/Incomplete/Death No Match

Order Summary

Source:  
Received Date: JUN-03-2013

Applicant Information

Name: Plummer Funeral Home  
Address: 16 Pleasant St  
Augusta, Maine 04330

Attention:  
Phone:  
Email: NoOne@vitalchek.com

Paid: \$0.00  
Due: \$0.00  
Balance: \$0.00

Event Requested

Event Type: Death  
Relation: Funeral Director  
Status:  
Comments:

Matched Events

Registrant Match  
No Matched Events Found.

New Order Copy to New Validate Order Void Issuance History Previous Return

The Status bar shows "Incomplete".

5. Finish the "incomplete" order. Once the Order reaches a "Complete" status, the order will no longer show in the "Incomplete" Order Work Queue.

20130601161 - Smart And Edwards Funeral Home (Yarmouth)

/Order Valid **Completed**

**Order Summary**

Source: Walk in

Received Date: JUN-18-2013

When the order reaches "completed" status, the order will no longer show in the "Incomplete" Order Work

Status:

JUN-18-2013

**Applicant Information**

Name: Smart And Edwards Funeral Home (Yarmouth)

Address: 1 Mayberry Ln  
Yarmouth, Maine 04096

Attention:

Phone:

Email:

**Payment Information**

Type	Amount	User
------	--------	------

Cash	\$15.00	Municipal Clerk
------	---------	-----------------

Paid:	\$15.00
-------	---------

Due:	\$15.00
------	---------

Balance:	\$0.00
----------	--------

## Exercise 5.2 – Incomplete Orders

**Skill Learned:** How to search and complete old "incomplete" orders that have not yet reached the "Completed" status.

All orders that have been successfully completed will show a "Completed" status as shown below.

20140900007 :Roger Grace

**Completed**

All orders that show an "Incomplete" status, as shown below, require additional steps be taken to reach a "Completed" status.

20140900010 :Tom Tank

/Order Valid **Incomplete**

In some cases, an order needs to be voided if there is not going to be an issuance done on the order.

20140900008 :Paul Tucker

**Void**

"Incomplete" orders can accumulate very fast and will remain indefinitely in an Incomplete queue until they are completed successfully.

There are many reasons an order will show a status of "Incomplete". A few examples are:

- A. Not all steps of the issuance process were completed.
- B. Not all pages of the issuance were completed.
- C. Multiple services were requested, but not all were completed.
- D. Multiple services were requested, but some are no longer needed.

- E. Order was abandoned for a number of reasons – such as, applicant is not qualified because they are unable to verify lineage, the father is not shown on the record, etc.
- F. No Matching Event.

Below we present each of the examples above and what action would need to be taken to bring the order to a “Completed” status.

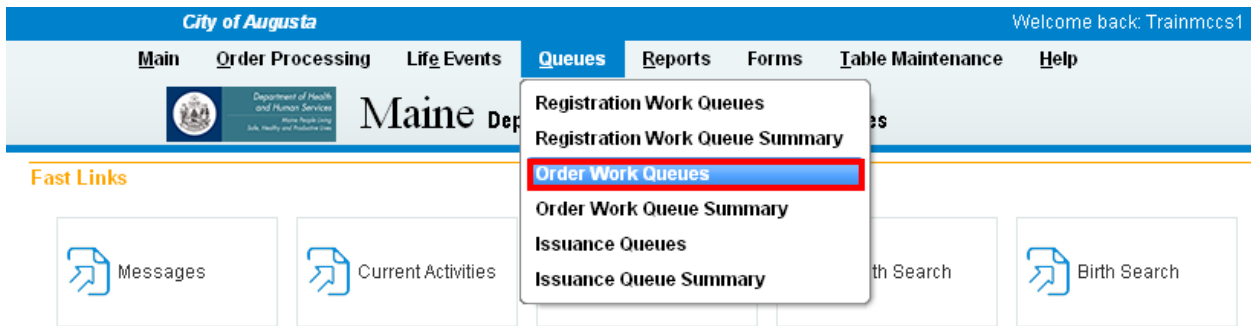
First, search for orders that remain in the “Incomplete” status.

There are two methods mentioned below on how to search for incomplete orders. The method selected is based on whether or not the user knows the order number.

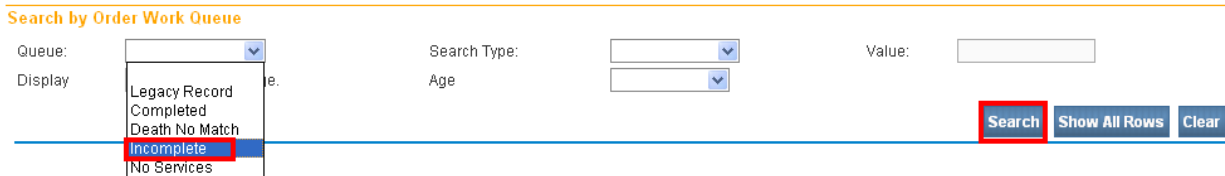
**Method 1 – Search for Incomplete Order - Order Number is Not Known:**

In the example that follows, the order number is not known.

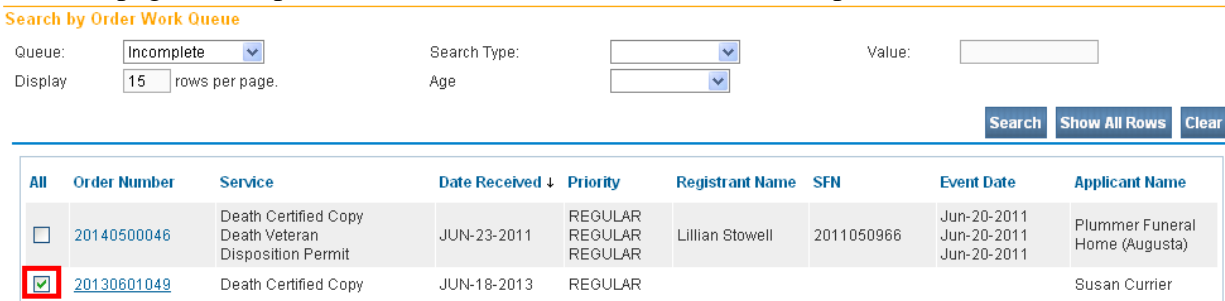
1. To check orders that may not be completed select **Queues->Order Work Queues** from the Home page. **The Search by Order Work Queue page will open.**



2. Select from the **Queue** dropdown, “Incomplete”. **Click the Search button.**



3. The page will expand with a list of orders that remain incomplete.



- Place a checkmark near the order number, and then click on the blue order number to open the order. The Order Summary page will open.

**Order Processing Menu**

- Applicant
- Match Events
- Services
- Payments
- Summary**
- Validate Order
- Print Forms
- Attachments
- Switch User

20130601049 :Susan Currier  
/Order Invalid/Incomplete/ Legacy Record

**Order Summary**

Source: Walk in  
Received Date: JUN-18-2013

ProCheck / ProID Status:  
Fee Effective Date: JUN-18-2013

Applicant Information		Payment Information	
<b>Name:</b>	Susan Currier	<b>Type</b>	<b>Amount</b>
<b>Address:</b>	11 School St Augusta, Maine 04330	Check	\$15.00
<b>Attention:</b>		<b>Paid:</b>	\$15.00
<b>Phone:</b>		<b>Due:</b>	\$15.00
<b>Email:</b>		<b>Balance:</b>	\$0.00
<b>User:</b>			wjtjy G klgonab

**Event Requested**

Event Type: Death    Suspend    Reject Request    Correspondence    Work Order    Amend    Receipt    Mailing Envelope    Mailing Label

Relation: Spouse

Status:

Comments:

Matched Events		Services	
Registrant	Match	<b>Service Name</b>	<b>Quantity</b>
Legacy Record		Death Certified Copy	1
		<b>Priority</b>	<b>Delivery</b>
		REGULAR	Counter
		<b>Fee</b>	<b>Issue</b>
		\$15.00	

**New Order**   **Copy to New**   **Validate Order**   **Void**   **Issuance History**   **Previous**   **Return**

## Method 2 – Search for Incomplete Order - Order Number is Known:

In the example that follows, the order number is known.

- To search for incomplete orders when the order number is known, from the **Home page** select **Order Processing -> Search**. The **Search for an order** page will display.

City of Augusta    Welcome back: Trainmccs1

Main   **Order Processing**   Life Events   Queues   Reports   Forms   Table Maintenance   Help

**Search**

Birth Fast Order

Death Fast Order

UPS Manifest

Fast Links

- Messages
- Current Activities
- Issuance Queue Summary
- Death Search
- Birth Search

- On the Search for an order page, in the Search by Order section, type in the Order Number as shown below. Click the Search button.

Search for an order

Search By Order

Order Number:

VPS Order Number:

Security Paper Number:

Tracking Number:

Received between  and

Search by Event Requested

First Name:

Last Name:

Search by Applicant

Organization Name:

First Name:

Last Name:

Phone:

Search by Matched Event

Event Type:

Search Criteria 1:

Value 1:

Search Criteria 2:

Value 2:

Maximum records to display:

**Search**

3. The Results page will display. Click on the Order Number to open the order.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
2014080004	AUG-15-2014	Bob Grace	Death	2014503460	Linda Grace

Total records : 1

**Order Number**

4. The Order Summary page will appear.

**Order Processing Menu**

- Applicant
- Match Events
- Services
- Payments
- Summary
- Validate Order
- Print Forms
- Attachments
- Switch User

2014080004 :Bob Grace  
/Order Valid/Incomplete

**Order Summary**

Source: Mail

Received Date: AUG-15-2014

ProCheck / ProID Status:

Fee Effective Date: AUG-15-2014

**Applicant Information**

Name: Bob Grace

Address:

Attention:

Phone:

Email:

**Payment Information**

Type	Amount	User
Cash	\$81.00	Cecile Clerk
<b>Paid:</b>	\$81.00	
<b>Due:</b>	\$81.00	
<b>Balance:</b>	\$0.00	

**Event Requested**

Event Type: Death    [Suspend](#) [Reject](#) [Request](#) [Correspondence](#) [Work Order](#) [Amend](#) [Receipt](#) [Mailing Envelope](#) [Mailing Label](#)

Relation: Sibling

Status: /Personal Valid/Medical Valid/Registered/Signed/Dropped to Paper/NA/ICD Coding Required

**Comments:**

Registrant	Match	Total Number of Issuances	Date of Last Issuance
Linda Grace	Yes	0	

Service Name	Quantity	Priority	Delivery	Fee
Death Certified Copy	12	REGULAR	MAIL	\$81.00 <a href="#">Issue</a>
Death Veteran	1	REGULAR	MAIL	\$0.00 <a href="#">Issue</a>

20140800004 - Bob Grace  
 /Order Valid **Incomplete**

**Order Summary**

Source: Mail  
 Received Date: AUG-15-2014  
 Fee Effective Date: AUG-15-2014

Applicant Information		Payment Information		
Name:	Bob Grace	Type	Amount	User
Address:		Cash	\$81.00	Cecile Clerk
Attention:		<b>Paid:</b>	\$81.00	
Phone:		<b>Due:</b>	\$81.00	
Email:		<b>Balance:</b>	\$0.00	

Event Requested  
 Event Type: Death    [Suspend](#) [Reject Request](#) [Correspondence](#) [Work Order](#) [Amend](#) [Receipt](#) [Mailing Envelope](#) [Mailing Label](#)  
 Relation: Sibling  
 Status: /Personal Valid/Medical Valid/Registered/Signed/Dropped to Paper/NA/ICD Coding Required  
 Comments:

Matched Events				Services				
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee
Linda Grace	Yes	0		Death Certified Copy	12	REGULAR	MAIL	\$81.00 <a href="#">Issue</a>
				Death Veteran	1	REGULAR	MAIL	\$0.00 <a href="#">Issue</a>

[New Order](#) [Copy to New](#) [Validate Order](#) [Void](#) [Issuance History](#) [Previous](#) [Return](#)

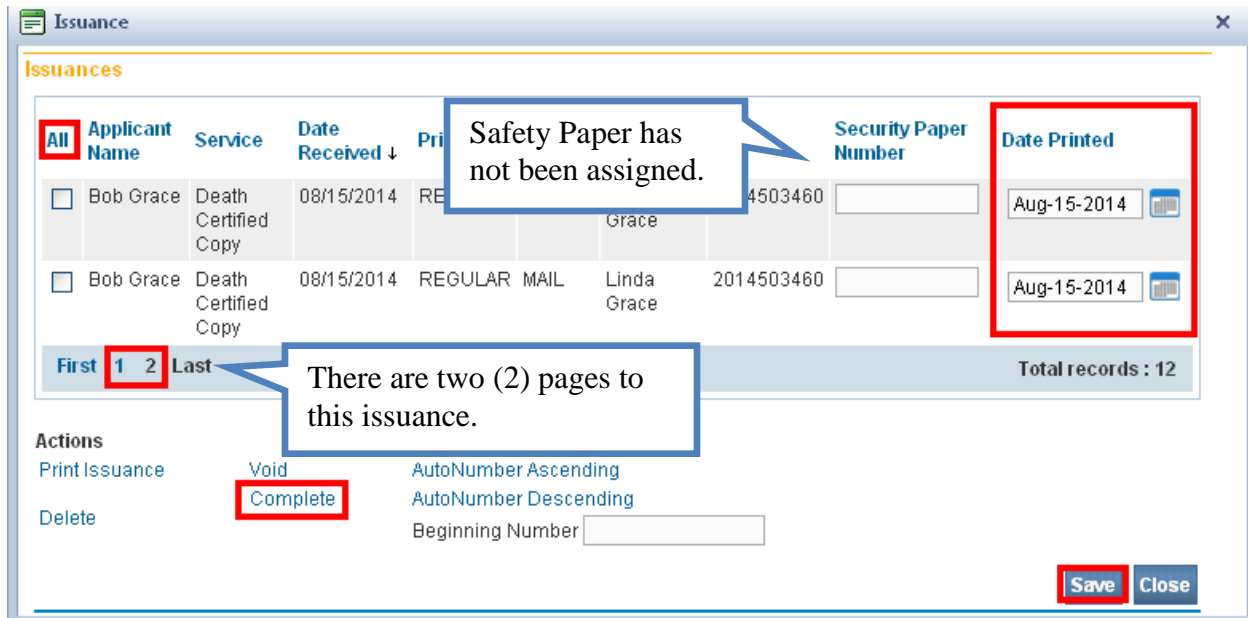
This order is in the "Incomplete" status.

Below are examples of why an order may remain in the "Incomplete" status and how to complete the order successfully so it reaches the "Completed" status.

**A. Order Incomplete – Not all steps of the issuance process were completed:**

1. In the example below the order remains in the "Incomplete" status because one or two of the three (3) required steps in an issuance have not been completed.
2. On the Summary page, click on the Issue link to view the Issuance box as shown below.





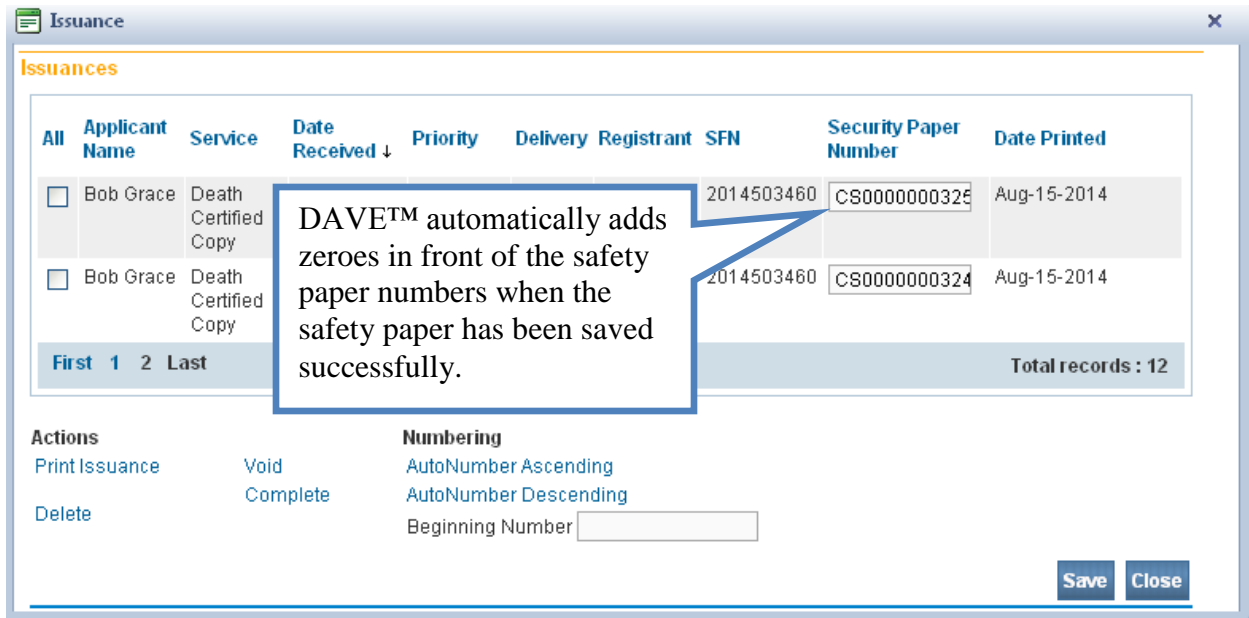
- In reviewing the Issuance box above, the issuances have been printed (Step 1 below). However, the Security Paper Numbers (Step 2 below) have not been assigned, and the “Complete” link (Step 3 below) has not been selected.

The three required steps in an issuance are:

- Step 1 – Print the issuance
- Step 2 – Add the Safety Paper numbers and SAVE
- Step 3 – Select the “Complete” link

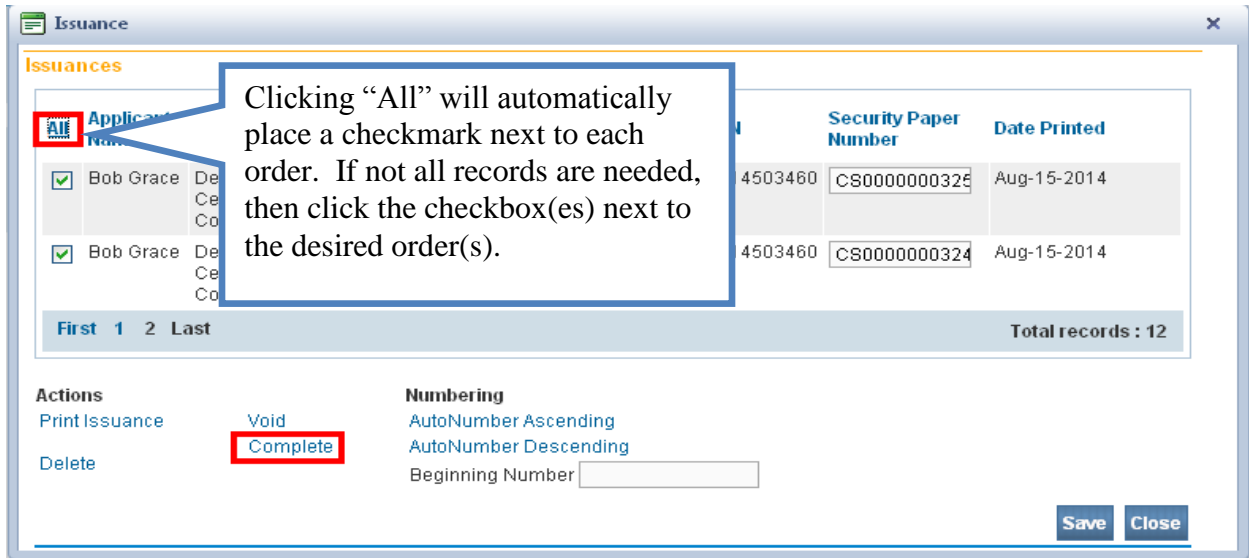
**NOTE: The three steps must be done in the sequence shown above, and for each page of the issuance. The desired order(s) must be selected prior to each step. To select all orders on the page, click on the “All” column header.**

- Since the issuances have already been printed in this example, click the All column header to select all the orders on that page, type in the safety paper numbers, then select the SAVE button (Step 2).



**NOTE: When the safety paper numbers have been saved successfully, the safety paper numbers will be preceded by zeroes as shown above.**

- For the last step (Step 3) in the issuance, click on the “All” column header (to select all orders shown) and click the “Complete” link as shown below.



- DAVE™ will return you to the Order Summary page. View the status bar to see if the order has reached “completed” status.

**B. Order Incomplete – Not all pages of the issuance were completed:**

1. Each issuance page can contain up to ten issuances. Therefore, if you ordered 12 death certified copies, the last two issuances will be shown on page 2 of the issuances box.
2. In the example below, all three steps of the issuance process were completed for Page 1 only. These three steps, however, were not completed for the last two issuances on Page 2.

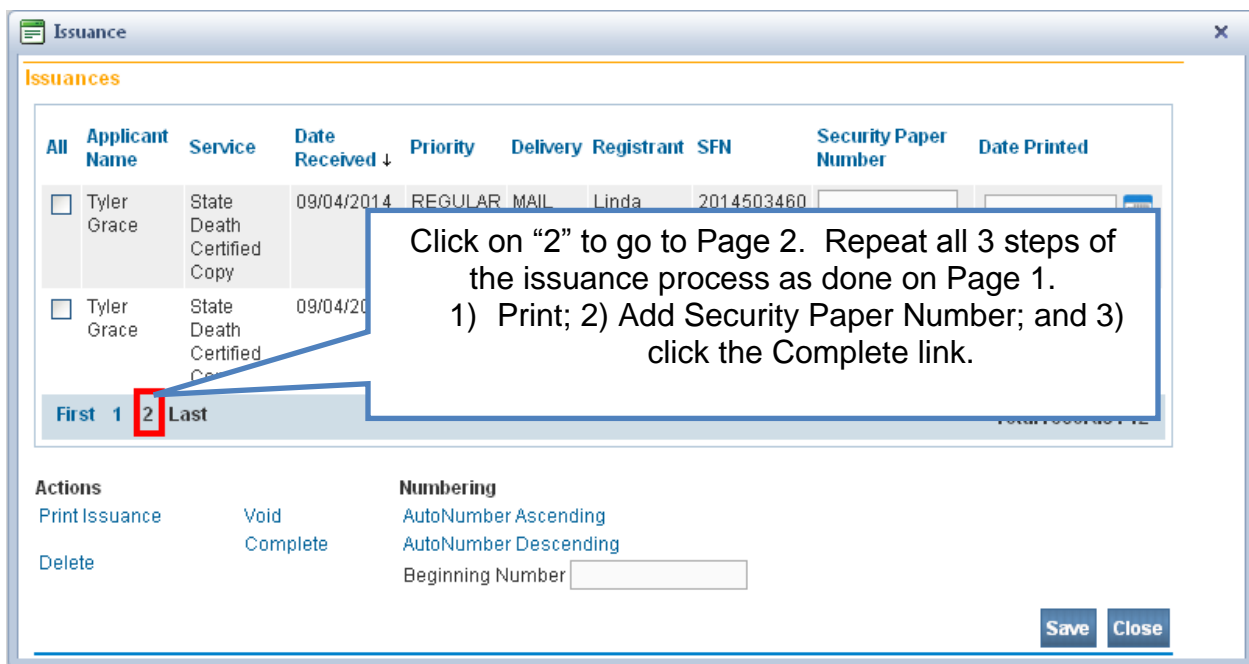
To complete this order, select Page 2 and perform all three (3) steps.

Step 1: Select “All”. Click the Print Issuance link.

Step 2: Select “All”. Add the Security Paper Numbers. SAVE.

Step 3: Select “All”. Click the “Complete” link.

The order status will now change to “Completed”.



### **C. Order Incomplete – Multiple Services Requested But Not All Have Been Completed:**

Examples of services are Death Certified Copy, Veteran Copy, Birth Certified Copy, etc.

1. In the example below, the order remains in the “incomplete” status because only the service for the 12 death certified copies have been completed. This order still contains a service for a Death Veteran copy which has not yet been issued.

20140800004 :Bob Grace  
/Order Valid/Incomplete

**Order Summary**  
Source: Mail  
Received Date: AUG-15-2014

**Applicant Information**  
Name: Bob Grace  
Address:  
Attention:  
Phone:  
Email:

**Payment Information**

Type	Amount	User
Cash	\$81.00	Cecile Clerk
<b>Paid:</b>	\$81.00	
<b>Due:</b>	\$81.00	
<b>Balance:</b>	\$0.00	

**Event Requested**  
Event Type: Death  
Relation: Sibling  
Status: /Personal Valid/Medical Valid/Reg

**Comment**  
Matched

The order remains in the "incomplete" status because the Death Veteran copy has not yet been issued.

The Issue link for the 12 Death Certified Copies is disabled as those issuances are complete.

The Death Veteran Issue link remains enabled as this issuance has not been done or not completed.

Registrant	Issuances	Priority	Delivery	Fee	Issue
Linda Grace	Yes 12 Aug-15-2014 10:35 AM	REGULAR	MAIL	\$81.00	Issue
	Death Certified Copy				
	Death Veteran	1	REGULAR	MAIL	\$0.00 <b>Issue</b>

**New Order** **Copy to New** **Validate Order** **Void** **Issuance History** **Previous** **Return**

2. Click on the Issue link for the Death Veteran service. The Issuances box will open.

**Issuance**

**Issuances**

All	Applicant Name	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Bob Grace	Death Veteran	08/15/2014	REGULAR	MAIL	Linda Grace	2014503460		

Total records : 1

**Actions**  
Print Issuance  
Delete

**Void**  
Complete

**Numbering**  
AutoNumber Ascending  
AutoNumber Descending  
Beginning Number

**Save** **Close**

3. Complete all three (3) steps of the issuance process as discussed above. Remember to select "All" before each step.

- Step 1 –Select Print Issuance
- Step 2 –Type in the safety paper numbers and then SAVE
- Step 3 –Click the Complete link

4. The Status Bar on the Summary page now shows the “completed” status.

20140800004 :Bob Grace 📄

**Completed**

**Order Summary**

Source: Mail ProCheck / ProID Status:  
 Received Date: AUG-15-2014 Fee Effective Date: AUG-15-2014

---

<b>Applicant Information</b> Name: Bob Grace Address: Attention: Phone: Email:	<b>Payment Information</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Type</th> <th>Amount</th> <th>User</th> </tr> </thead> <tbody> <tr> <td>Cash</td> <td>\$81.00</td> <td>Cecile Clerk</td> </tr> <tr> <td><b>Paid:</b></td> <td>\$81.00</td> <td></td> </tr> <tr> <td><b>Due:</b></td> <td>\$81.00</td> <td></td> </tr> <tr> <td><b>Balance:</b></td> <td>\$0.00</td> <td></td> </tr> </tbody> </table>	Type	Amount	User	Cash	\$81.00	Cecile Clerk	<b>Paid:</b>	\$81.00		<b>Due:</b>	\$81.00		<b>Balance:</b>	\$0.00	
Type	Amount	User														
Cash	\$81.00	Cecile Clerk														
<b>Paid:</b>	\$81.00															
<b>Due:</b>	\$81.00															
<b>Balance:</b>	\$0.00															

---

**Event Requested**

Event Type: Death Corres  
 Relation: Sibling el  
 Status: /Personal Valid/Medical Valid/Registered/Sign

**Comments:**

Both Issue links are disabled as both issuances (services) are complete.

---

<b>Matched Events</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Registrant</th> <th>Match</th> <th>Total Number of Issuances</th> <th>Date of Last Issuance</th> </tr> </thead> <tbody> <tr> <td>Linda Grace</td> <td>Yes</td> <td>13</td> <td>Aug-15-2014 11:38 AM</td> </tr> </tbody> </table>	Registrant	Match	Total Number of Issuances	Date of Last Issuance	Linda Grace	Yes	13	Aug-15-2014 11:38 AM	<b>Services</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Service Name</th> <th>Quantity</th> <th>Priority</th> <th>Delivery</th> <th>Fee</th> <th>Issue</th> </tr> </thead> <tbody> <tr> <td>Death Certified Copy 📄</td> <td>12</td> <td>REGULAR</td> <td>MAIL</td> <td>\$81.00</td> <td style="border: 1px solid red;">Issue</td> </tr> <tr> <td>Death Veteran 📄</td> <td>1</td> <td>REGULAR</td> <td>MAIL</td> <td>\$0.00</td> <td style="border: 1px solid red;">Issue</td> </tr> </tbody> </table>	Service Name	Quantity	Priority	Delivery	Fee	Issue	Death Certified Copy 📄	12	REGULAR	MAIL	\$81.00	Issue	Death Veteran 📄	1	REGULAR	MAIL	\$0.00	Issue
Registrant	Match	Total Number of Issuances	Date of Last Issuance																								
Linda Grace	Yes	13	Aug-15-2014 11:38 AM																								
Service Name	Quantity	Priority	Delivery	Fee	Issue																						
Death Certified Copy 📄	12	REGULAR	MAIL	\$81.00	Issue																						
Death Veteran 📄	1	REGULAR	MAIL	\$0.00	Issue																						

New Order Copy to New Validate Order Void Issuance History Previous Return

**D. Order Incomplete – Multiple Services Requested But Some Are No Longer Needed:**

There are many occasions when an order has more than one service. For example, one order is placed for both a Death Certified Copy and a Death Veteran copy. The Death Certified Copy is issued, but for some reason the Death Veteran copy is no longer required. Until the Death Veteran copy service is removed/reversed from the order, the status will remain “Incomplete”.

To remove/reverse a service that has already been requested, but an issuance on that service is no longer needed:

<b>Matched Events</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Registrant</th> <th>Match</th> <th>Total Number of Issuances</th> <th>Date of Last Issuance</th> </tr> </thead> <tbody> <tr> <td>Sally Singer</td> <td>Yes</td> <td>6</td> <td>Aug-15-2014 12:14 PM</td> </tr> </tbody> </table>	Registrant	Match	Total Number of Issuances	Date of Last Issuance	Sally Singer	Yes	6	Aug-15-2014 12:14 PM	<div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;"><b>Services</b></div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Service Name</th> <th>Quantity</th> <th>Priority</th> <th>Delivery</th> <th>Fee</th> <th>Issue</th> </tr> </thead> <tbody> <tr> <td>Death Certified Copy 📄</td> <td>6</td> <td>REGULAR</td> <td>MAIL</td> <td>\$45.00</td> <td>Issue</td> </tr> <tr> <td>Death Veteran</td> <td>1</td> <td>REGULAR</td> <td>MAIL</td> <td>\$0.00</td> <td style="border: 1px solid red;">Issue</td> </tr> </tbody> </table>	Service Name	Quantity	Priority	Delivery	Fee	Issue	Death Certified Copy 📄	6	REGULAR	MAIL	\$45.00	Issue	Death Veteran	1	REGULAR	MAIL	\$0.00	Issue
Registrant	Match	Total Number of Issuances	Date of Last Issuance																								
Sally Singer	Yes	6	Aug-15-2014 12:14 PM																								
Service Name	Quantity	Priority	Delivery	Fee	Issue																						
Death Certified Copy 📄	6	REGULAR	MAIL	\$45.00	Issue																						
Death Veteran	1	REGULAR	MAIL	\$0.00	Issue																						

Next Order Copy to New Take me to Regular Order Void Issuance History Save & Validate

This order remains in incomplete status because the issuance for Death Veteran is no longer needed but the service was not reversed.

1. Search and open the order.
2. Select the Services tab. The Services page will open.

Order Processing Menu

- Applicant
- Match Events
- Services**
- Payments
- Summary
- Validate Order
- Print Forms
- Attachments
- Switch User

20140800005 :Paul Singer  
/Order Valid **incomplete**

**Services**

Source: Mail Received Date: Aug-15-2014 Fee Effective Date: Aug-15-2014

Will this order be paid for by Credit Card?

1 Name: Sally Singer  
Applicant Relationship to Registrant: Sibling

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	Edit
1	Death Certified Copy	6	REGULAR	MAIL	Probate Will		\$45.00	Edit Reverse
2	Death Veteran	1	REGULAR	MAIL	Probate Will		\$0.00	Edit <b>Reverse</b>

Add Service

Save Previous Next Return

3. Click on the “Reverse” link next to the service you no longer need. A popup message will appear “Are you sure you want to reverse this Service?”. Click OK.

1 Name: Sally Singer  
Applicant Relationship to Registrant: Sibling

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	Edit
1	Death Certified Copy	6	REGULAR	MAIL	Probate Will		\$45.00	Edit Reverse
2	Death Veteran	1	REGULAR	MAIL	Probate Will		\$0.00	Edit <b>Reverse</b>

Add Service

Save Previous Next Return

4. The service was reversed. The Death Veteran fee is now \$0.00. The status has changed from “incomplete” to “completed” as shown below.

Order Processing Menu

- Applicant
- Match Events
- Services
- Payments
- Summary
- Validate Order
- Print Forms
- Attachments
- Switch User

2014080005 : Paul Singer  
/Completed

Services

Source: Mail Received Date: Aug-15-2014 Fee Effective Date: Aug-15-2014

Will this order be paid for by Credit Card?

1 Name: Sally Singer  
Applicant Relationship to Registrant: Sibling

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	
1	Death Certified Copy	6	REGULAR	MAIL	Probate Will		\$45.00	Edit Reverse
2	Death Veteran	1	REGULAR	MAIL	Probate Will		\$0.00	Edit Reverse
2	Death Veteran	-1	REGULAR	MAIL	Probate Will		\$0.00	Edit Reverse

The service has been reversed (-1).

Add Service

Save Previous Next Return

**E. Order Incomplete – Order Was Abandoned Because Issuances No Longer Needed:**

If an order has been started, but you no longer need to do the issuance on any of the services requested on that order, then the order should be voided. An example of when this might occur is when you have started the order but learn the applicant is not eligible to receive the certificates.

1. Select the VOID button at the bottom of the order.

**Service**

Source: Mail Priority: REGULAR Delivery: MAIL

Service	Quantity	Request Reason	Other specify
<input checked="" type="checkbox"/> Death Certified Copy	6	Probate Will	
<input type="checkbox"/> Death Non-Certified Copy			
<input type="checkbox"/> Death Veteran			
<input type="checkbox"/> Miscellaneous Fees			

**Calculate Fees**

---

**Payments**

Credit Card **SubTotal:** \$45.00  
 Electronic Funds Transfer **Total:** = \$45.00  
 Cash **Paid:** = \$0.00  
 Check/Money Order **Balance:** = \$45.00

**Change Due:** \$0.00

Number: Payment: 45.00

---

**Event Requested**

Event Type: Death [Reject Request](#) [Correspondence](#)  
Relation: Sibling  
Status: Personal Valid/Medical Valid/Registered/Signed/D  
Comments:

Click the "VOID" button to void out the order and prevent it from going into the "Incomplete" queue.

Registrant	Match	Total Number of Issuances	Date of Last Issuance
Charles Caplin	Yes	0	

Service	Quantity	Priority	Delivery	Fee
Death Certified Copy	6	REGULAR	MAIL	\$45.00

**Next Order** **Copy to New** **Take me to Regular Order** **Void** **Issuance History** **Clear** **Save & Validate**

- The status bar will change from "Incomplete" to "Void".

20140800006 :Tom Caplin

Void

**Death Fast Order**

**Applicant:**  Person  Organization ID Type: Other:  Expedite Order

**Name**

Prefix: First: Tom Middle: Last: Caplin Suffix:

**Applicant Address**

Street Number: Pre Directional: Street Name: Street Designator: Post Directional: Apartment Number:

City or Town: State: Country: United States Zip Code:

**F. Order Incomplete – No Matching Event (record) was found:**

If an order is started for a record that is not in the EDRS/EBRS, the Event Search portion of the order will return a "No Matching Event" as shown below.



**Event Search** ⓘ

File Number: Year:   Number:

Registrant First:   Middle:   Last:

Date of Death Start:   End:

Date of Birth Start:   End:

Gender:   Place of Event City:   Place of Event County:

Number of rows to be returned:

<input checked="" type="radio"/>	No Matching Event
<input type="radio"/>	Legacy Record

If the SAVE/VALIDATE button is selected when there is “No Matching Event” the Status bar will return a status of “Order Invalid/Incomplete/Death No Match” as shown below.

20140900012 :John Drew  
 /Order Invalid **Incomplete/Death No Match**

1. Void the order to remove the “Incomplete” status.
2. The new status will be “Void”.

20140900012 :John Drew  
 /Void

### Exercise 5.3 – Work Queues - Filters

**Skill Learned:** How to refine work queue searches through the use of filters.

1. A search can be done by **Search Type** with a **Value** keyed in.

Select an item from the Search Type dropdown. And, enter a value in the Value field.

Search by Order Work Queue

Queue:  Display:  rows per page.

Search Type:  Value:

SFN

- A search can be done by making a selection from the **Age** dropdown.

Search by Order Work Queue

Queue:  Search Type:  Value:

Display  rows per page. Age

All	Order Number	Service	Date Received ↓	Priority	Registrant Name	SFN	Event Date	Applicant Name
<input type="checkbox"/>	20130600063		JUN-03-2013					Plummer Funeral Home (Augusta)

- The results of this filtered search by **Age** are displayed below. There are 7 incomplete orders that are <=30 days old.

Search by Order Work Queue

Queue:  Search Type:  Value:

Display  rows per page. Age

All	Order Number	Service	Date Received ↓	Priority	Registrant Name	SFN	Event Date	Applicant Name
<input type="checkbox"/>	20131000037		OCT-17-2013		Tabitha Jones			Tabitha Springer
<input type="checkbox"/>	20131000038	Death Certified Copy	OCT-17-2013	REGULAR	Gregg Smart	2013508627	Oct-08-2013	Lydia Smart
<input type="checkbox"/>	20131000039	Death Certified Copy	OCT-17-2013	REGULAR	Gregg Smart	2013508627	Oct-08-2013	Sprout Funeral Home
<input type="checkbox"/>	20131000040		OCT-17-2013		Griffin Bosse			Mark Bosse
<input type="checkbox"/>	20131000042	Death Certified Copy	OCT-21-2013	REGULAR	Test Smith	2013-508625	Sep-21-2013	Ceal Test
<input type="checkbox"/>	20131000052	Death Certified Copy	OCT-30-2013	REGULAR	Emmett Tibbetts	2011052250	Sep-24-2011	Dora Tibbetts
<input type="checkbox"/>	20131000054	Death Certified Copy	OCT-30-2013	REGULAR	James Bell	2013508631	Oct-21-2013	Sue Que
								Total records : 7

## Section 6: Order Processing

**Skill Learned:** How to use the **Order Processing** to begin entering a new order.

### Exercise 6.1 – Adding Safety Paper

#### Add Safety Paper:

Before completing an order/issuance, safety paper must be assigned to your city/town.

- Log into DAVE™.
- On the Home page select Table Maintenance (see below).
- Select “Security Paper Management”.

4. The “Select the desired action” dialog box will open as shown below.
5. Select “Add Paper Numbers to Master Inventory” as shown below.

**Security Paper**

Select the desired action

Add	Change	View
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Add Paper Numbers to Master Inventory</div> Assign Security Paper	Void Security Paper Delete from Master Inventory Reassign to Master Inventory	View Security Paper Assignments Search for Security Paper

6. The “Add Paper Numbers to Master Inventory” dialog box will open as shown below.

**Security Paper**

Add Paper Numbers to Master Inventory

Paper Type ▾  
 Beginning Number    
 Ending Number   (To process a single piece of paper, leave 'Ending Number' blank)

Save
Return

7. From the Paper Type dropdown box select “Safety Paper”.

**Security Paper**

Add Paper Numbers to Master Inventory

Paper Type ▾  
 Beginning Number Safety Paper  
 Ending Number   (To process a single piece of paper, leave 'Ending Number' blank)

8. In the Beginning Number text box key in the first safety paper number.

---

Security Paper

Add Paper Numbers to Master Inventory

Paper Type ▸ Safety Paper ▾  
Beginning Number ▸ 100001  
Ending Number  (To process a single piece of paper, leave 'Ending Number' blank)

Save Return

- In the Ending Number text box key in the last safety paper number as shown below.  
(Note: Do not add more than 499 sheets of paper.)

- Select SAVE.

---

Security Paper

Add Paper Numbers to Master Inventory

Paper Type ▸ Safety Paper ▾  
Beginning Number ▸ 100001  
Ending Number  (To process a single piece of paper, leave 'Ending Number' blank)

Save Return

- The “Add Paper Numbers to Master Inventory Results” dialog box will open.
- The message “Paper range was successfully added” will be shown as shown below.
- Click on the blue link “Assign part of this range”. (Note: If this step is skipped, go back to the Table Maintenance Menu and select “Assign Security Paper” to complete.)

---

Security Paper

Add Paper Numbers to Master Inventory Results

Paper Type Safety Paper  
Result(s) 000000100001 - 000000100050  
Assign Range [Assign part of this range](#)  
Delete Range [Delete part of this range](#)

Paper range was successfully added.

Return

- The “Assign Security Paper” dialog box will open as shown below.

---

Security Paper

Assign Security Paper

Paper Type ▾ Safety Paper ▾  
Assign to Office ▾  
Beginning Number ▾ 100001  
Ending Number 100050 (To process a single piece of paper, leave 'Ending Number' blank)

Save Return

15. Select the “Assign to Office” drop down box as shown below.

---

Security Paper

Assign Security Paper

Paper Type ▾ Safety Paper ▾  
Assign to Office ▾  
Beginning Number ▾  
Ending Number

- City of Auburn
- City of Augusta
- City of Augusta-do not use
- City of Bangor Maine
- City of Bangor(DO NOT USE)
- City of Bath
- City of Belfast
- City of Biddeford
- City of Brewer
- City of Calais
- City of Caribou
- City of Eastport
- City of Ellsworth
- City of Gardiner

16. Select your city/town.

17. The “Assign Security Paper Results” dialog box will open.

---

Security Paper

Assign Security Paper Results

Paper Type Safety Paper  
Assigned Office City of Augusta  
View all ranges assigned to this office  
Result(s) 000000100001 - 000000100050 Paper range was successfully assigned.  
Update Range Void part of this range | Reassign part of this range to Master Inventory

Return

In the illustration above, the Results shows “Paper range was successfully assigned” to the City of Augusta.

## Exercise 6.2 –Void Safety Paper

### Void Safety Paper

1. From the Home page, select Table Maintenance.
2. Select “Security Paper Management”.
3. Click “Void Security Paper” as shown below in the Change box.

Security Paper

Select the desired action

<p><b>Add</b></p> <p>Add Paper Numbers to Master Inventory</p> <p>Assign Security Paper</p>	<p><b>Change</b></p> <p><b>Void Security Paper</b></p> <p>Delete from Master Inventory</p> <p>Reassign to Master Inventory</p>	<p><b>View</b></p> <p>View Security Paper Assignments</p> <p>Search for Security Paper</p>
---	--	--

4. The “Void Security Paper” dialog box will open as shown below.
5. Complete all the required fields as indicated by red arrows.
6. Select SAVE.

Security Paper

Void Security Paper

Paper Type

Assigned to Office

Multiple Ranges

To void a single piece of paper, leave the Ending Number of the range blank.

Beginning Number  Ending Number  More Ranges

Reason

Save Return

**Exercise 6.3 –View Safety Paper**

View Safety Paper:

1. On the Home page, select Table Maintenance.
2. Select “Security Paper Management”.
3. Select “View Security Paper Assignments” from the View box shown below.

Security Paper

Select the desired action

<p><b>Add</b></p> <p>Add Paper Numbers to Master Inventory</p> <p>Assign Security Paper</p>	<p><b>Change</b></p> <p>Void Security Paper</p> <p>Delete from Master Inventory</p> <p>Reassign to Master Inventory</p>	<p><b>View</b></p> <p><b>View Security Paper Assignments</b></p> <p>Search for Security Paper</p>
---	---	---

4. The “View Security Paper Assignments” dialog box will open as shown below.
5. Select the Paper Type from the dropdown box.
6. Select the Assigned to Office dropdown to select your city/town.
7. Select SEARCH.

---

Security Paper

View Security Paper Assignments

Paper Type ▾

Assigned to Office (Unassigned) ▾

8. The “View Security Paper Assignments” dialog box will open for your city/town as shown below.

---

Security Paper

View Security Paper Assignments

Paper Type ▾ Safety Paper ▾

Assigned to Office City of Augusta ▾

Range Assigned	Sheets Voided	Sheets Used	Sheets Available
000000100001 - 000000100050	0	0	50
000000332312 - 000000333000	29	631	29
000000574001 - 000000574495	1	255	239
000000574501 - 000000575000	0	0	500
000000900700 - 000000900750	6	6	39
			Total records : 5

Search Return

9. The “Range Assigned” column shown above displays all the safety paper range(s) keyed in.

The “Sheets Voided” column shows a count of all the safety paper that has been voided for that range.

The “Sheets Used” column shows a count of all the safety paper that has been used in that range.

The “Sheets Available” shows a count of all the safety paper that is still available for use in that range.

- Click on any one of the numbers shown under the Sheets Voided, Sheets Used and Sheets Available columns to see the safety paper numbers that were voided, used, or still available for issuance.

For example, to see which safety paper numbers were voided in the range 332312 – 333000, click on the number 29 as shown below.

#### Security Paper

View Security Paper Assignments

Paper Type ▾ **Safety Paper** ▾

Assigned to Office ▾ City of Augusta ▾

Range Assigned	Sheets Voided	Sheets Used	Sheets Available
000000100001 - 000000100050	0	0	50
000000332312 - 000000333000	29	631	29
000000574001 - 000000574495	1	255	239
000000574501 - 000000575000	0	0	500
000000900700 - 000000900750	6	6	39
			Total records : 5

The page will expand and a Selected Range Detail box will appear showing all 29 safety papers that have been voided.

#### Security Paper

View Security Paper Assignments

Paper Type ▾ **Safety Paper** ▾

Assigned to Office ▾ City of Augusta ▾

Range Assigned	Sheets Voided	Sheets Used	Sheets Available
000000100001 - 000000100050	0	0	50
000000332312 - 000000333000	29	631	29
000000574001 - 000000574495	1	255	239
000000574501 - 000000575000	0	0	500
000000900700 - 000000900750	6	6	39
			Total records : 5

**Selected Range Detail**

000000332387 - 000000332395
000000332434 - 000000332440
000000332627 - 000000332632
000000332682 - 000000332687
000000332905

The Selected Range Detail box shows all 29 safety papers that have been voided.

[Search](#) [Return](#)

## Exercise 6.4 – Search Safety Paper

Search Safety Paper:



---

There may be occasions when a safety paper used doing an issuance will trigger a popup message stating the safety paper has already been used. The following is a great tool when trying to check the status of a safety paper.

1. Go to the Home page.
2. Select Table Maintenance.
3. Select “Security Paper Management”.
4. Select Search for a Security Paper as shown below.

---

Security Paper

Select the desired action

Add	Change	View
Add Paper Numbers to Master Inventory Assign Security Paper	Void Security Paper Delete from Master Inventory Reassign to Master Inventory	View Security Paper Assignments <b>Search for Security Paper</b>

---

5. Complete the Paper Type and Paper Number dropdown boxes as shown below.
6. Select SEARCH.

Security Paper

Search for Security Paper

Paper Type ▶

Paper Number ▶

---

7. The Search for Security Paper dialog box opens as shown below.

---

## Security Paper

Search for Security Paper

Paper Type ▾ Safety Paper ▾  
Paper Number ▾ 332387

---

### Search Results

Assigned To City of Augusta  
Status Void  
Order Number 20121200866  
Order Subject Name Talan Kirk  
Applicant Name Plummer Funeral Home (Augusta)  
Clerks Name pcjd Marie wdotbn

Search Return

The page above contains lots of data regarding the safety paper. It will indicate what city/town it was assigned to, the order number, applicant number and the clerk's name as shown above.

In the example below, the City of Augusta clerk is able to see the status of safety paper that was assigned to the City of Portland.

---

## Security Paper

Search for Security Paper

Paper Type ▾ Safety Paper ▾  
Paper Number ▾ 397767

---

### Search Results

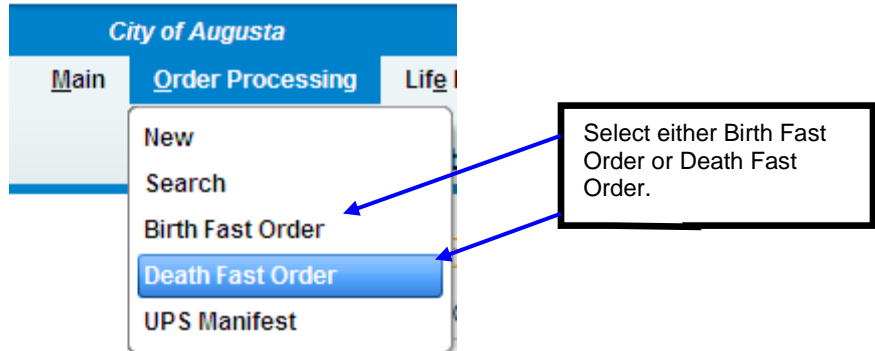
Assigned To City of Portland  
Status Void  
Order Number  
Order Subject Name  
Applicant Name  
Clerks Name

Search Return

Select the Return button at any time to go back to the Home page.

## Exercise 6.5 – Applicant Section

1. From the **Home** page select **Order Processing -> Death Fast Order OR Birth Fast Order**. You should see the **Applicant** page as shown below. The **Applicant** page is used to gather information on the person requesting the service to be provided. Later, we will gather registrant information.



The Fast Order application page is one long continuous page that has the following sections:

- Applicant – with Shipping and Contact Information
- Eligibility
- Event Search
- Service
- Payment
- Event Requested
- Matched Event

Applicant Section:

The Applicant is the customer requesting the service.

The Applicant can be a person or an organization.  
In the example below the Applicant is a Person.

**Death Fast Order**

Applicant:  Person  Organization ID Type:   Other:   Expedite Order

Name

Prefix  First  Middle  Last  Suffix

Applicant Address

Street Number  Pre Directional  Street Name  Street Designator  Post Directional  Apartment Number

City or Town  State  Country  Zip Code

Shipping Information

Contact Information

2. Enter the Applicant’s name and address. In the ID Type box, select the dropdown button to select which method of identification the Applicant has provided as proof they are who they say they are.

### Death Fast Order

Applicant:  Person  Organization **ID Type:**   Other:   Expedite Order

Name  
Prefix:  First:  Middle:  Last:  Suffix:

Applicant Address  
Street Number:  Pre Directional:  Street Name:  Street Designator:  Post Directional:  Apartment Number:

City or Town:  State:  Code:

U.S. passport  Valid Driver License

Alternate ID  
Employment ID  
Government ID  
Medicaid ID  
Military ID  
Naturalization Certificate  
Non-Driver License  
Prison ID  
Social Services ID  
Student ID

3. In the example below the Applicant is an Organization. When the radio button is selected for Organization the page is redrawn to provide a text box to select the organization name.

Note: Do not try to type in the Organization name.

### Death Fast Order

Applicant:  Person  **Organization** ID Type:   Other:   Expedite Order

Organization  
Name:

Applicant Address  
Street Number:  Pre Directional:  Street Name:  Street Designator:  Post Directional:  Apartment Number:

City or Town:  State:  Country:  Zip Code:

United States

Shipping Information  
 Contact Information

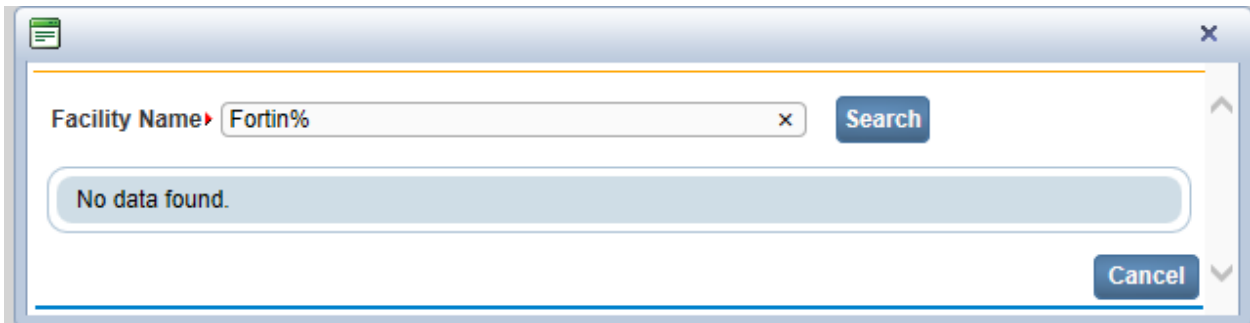
4. To enter the organization name, select the magnifying glass shown above, and the Facility Name dialog box will open as shown below.

Facility Name:

5. In the Facility Name box key in just a few letters contained in the name of the facility. Use a wildcard (%) before and after the letters. This tells the system to find names that contain these letters.

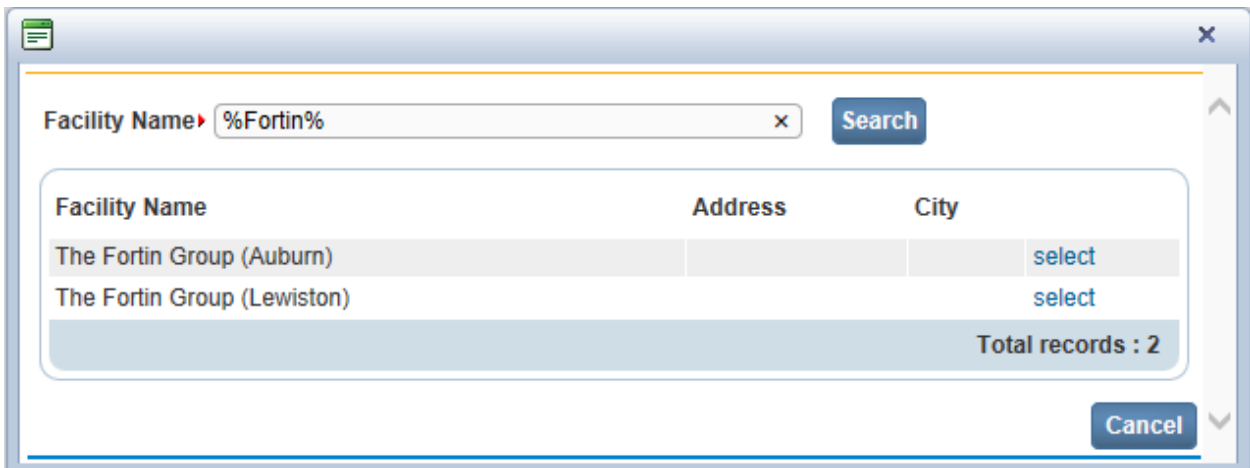
- 
- If the wildcard (%) is only used after the letters, a facility that begins with the word “The” as an example may not be found. If the organization may or may not begin with “The” or other letter, use the wildcard before and after the letters keyed into the Facility Name box.

Example: Below (Fortin%) was entered. This tells the system to look for all names that “begin” with Fortin. The system found no data because there is no name in the system that begins with Fortin. The correct name begins with The Fortin Group.



A screenshot of a search window. The 'Facility Name' field contains 'Fortin%' and the 'Search' button is pressed. The results area displays 'No data found.' and a 'Cancel' button is visible at the bottom right.

Below a wildcard before and after the name (%Fortin%) is used which tells the system to find any organizations that contain these letters. In this case results were returned.



A screenshot of a search window. The 'Facility Name' field contains '%Fortin%' and the 'Search' button is pressed. The results area displays a table with two rows of data and a 'Total records : 2' indicator. A 'Cancel' button is visible at the bottom right.

Facility Name	Address	City	
The Fortin Group (Auburn)			select
The Fortin Group (Lewiston)			select

Total records : 2

- Click the Select button.

Now that the Applicant’s name and address was entered, add the shipping and contact information if desired.

Death Fast Order

Applicant:  Person  Organization ID Type: Valid Driver License    Expedite Order

Name

Prefix  First  Middle  Last  Suffix

Applicant Address

Street Number  Pre Directional  Street Name  Street Designator  Post Directional  Apartment Number

 City or Town  State  Country  Zip Code

Shipping Information  
 Contact Information



Selecting the Shipping Information and/or Contact Information links as shown above, will redraw the page and open the Shipping Information and/or Contact Information section shown below. Clicking on the links again will close the Shipping Information and/or Contact Information sections.

Complete the information as shown below.

Shipping Information

Shipping Name  
Prefix  First  Middle  Last  Suffix

Shipping Address

Street Number  Pre Directional  Street Name  Street Designator  Post Directional  Apartment Number

 City or Town  State  Country  Zip Code

Contact Information

Attention:   
Phone Number:  -  -  Alternate Number:  -  -  Fax Number:  -  -   
Email:

Exercise 6.6 – Eligibility Section

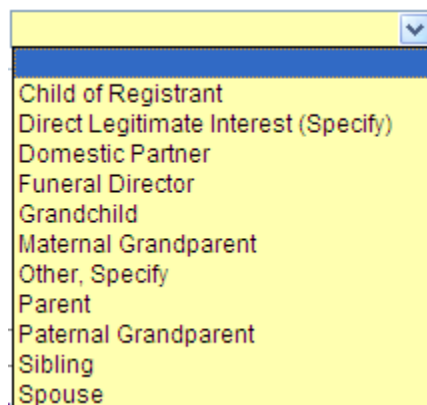
Eligibility Section:

1. Select the applicant relationship from the dropdown  button.

---

## Eligibility

Applicant Relationship:  Other Specify:



A dropdown menu with a yellow background and a blue header bar. The menu is open, showing a list of relationship options: Child of Registrant, Direct Legitimate Interest (Specify), Domestic Partner, Funeral Director, Grandchild, Maternal Grandparent, Other, Specify, Parent, Paternal Grandparent, Sibling, and Spouse.

If Direct Legitimate Interest (Specify) or Other, Specify is selected from the dropdown list, key in a value in the Other Specify text box as shown below.

---

## Eligibility

Applicant Relationship:  Other Specify:

### Exercise 6.7 – Event Search Section


#### Event Search Section:

A record may be searched using any of the fields shown below. Removing any of the checkmarks shown after each field name is not necessary. The system will not search for data with a checkmark unless a value has been entered in the field.

The Registrant (in red below) is the person's name on the record. This is often confused with the Applicant which is the customer as discussed above.



In the example below a search was made for the record by keying in just the first initial of the First name on the record, and keying in the Last name on the record.



1. Enter the values in the fields chosen for the search, select the Search button twice as shown in red below.

Event Search 

File Number: Year:   Number:

**Registrant** First:   Middle:   Last:

Date of Death Start:    End:   

Date of Birth Start:    End:   

Gender:   Place of Event City:   Place of Event County:

Number of rows to be returned:   **Search**

Select	Date of Event	SFN	Registrant Name	Place of Event
<input type="radio"/>			No Matching Event	
<input type="radio"/>			Legacy Record	
<input checked="" type="radio"/> <a href="#">Preview</a>	Sep-21-2013	<b>2013-508625</b>	Smith, Test	Kennebec
<input type="radio"/> <a href="#">Preview</a>	Sep-21-2013		Smith, Trissa	

Total records : 2

**Note: Municipal Clerks can only do issuances for their own city/town.**

If the record has a residence city and/or place of death for your town, the results will display as shown above. Be sure that the radio button next to the word “Preview” is selected for the record you want.

If no results are returned, view the case and check if the residence city and/or place of death is your town. This will be discussed later.

In the picture above, under the SFN column, the State File Number for Smith, Test will appear.

The fact that there is a State File Number for this record indicates that this record has been registered.


In the picture above there is no SFN for Smith, Trissa. This record has not yet been registered. Do not proceed any further with this order until the case is registered. This will be discussed more later.

To see a synopsis of the case to insure the correct record is displayed, select the blue Preview link.

Select	Date of Event	SFN	Registrant Name	Place of Event
<input type="radio"/>			No Matching Event	
<input type="radio"/>			Legacy Record	
<input checked="" type="radio"/> <a href="#">Preview</a>	Sep-21-2013	2013-508625	Smith, Test	Kennebec
<input type="radio"/> <a href="#">Preview</a>	Sep-21-2013		Smith, Trissa	

Total records : 2



The Preview dialog box will open. Select the  in the right hand corner to close the Preview box.



**Preview**

**Preview**

**File Number:** 2013-508625      **File Date:** Sep-21-2013

**Case Id:** 37952      **Medical Record Number:**      **ME Case Number:**

**Decedent's Name:** Test Smith      **Date of Death:** Sep-21-2013

**Spouse's Name:**      **Marital Status:** Never Married

**Gender:** Male      **Date of Birth:** Jun-02-1911      **SSN:** Unknown

**City or Town of Death:** Augusta      **County:** Kennebec

**Place of Death:** 50 Liberty Lane, Augusta, Maine 04330

**Residence:** Augusta, Maine, United States

**Mother's Maiden Name:** Susie Taylor

**Funeral Director:** David F. Barnes

**Funeral Home:** Bartlett Funeral Home, 24 Houlton, Danforth

**Medical Certifier:** Medicine Man

**Date Entered:** SEP-21-2013      **Last Update Made By:** Cecile Sprout

**Status:** /Personal Valid/Medical Valid Registered NANA/NA/ICD Coding Required

---

## Exercise 6.8 – Service Section

### Service Section:

This section allows data entry of what the customer is requesting, how that request was made, and how the delivery is handled.

The red indicators ▶ are required fields.

1. Complete all six required fields as shown in the example below. The required fields are: Source, Priority, Delivery, Service, Quantity and Request Reason.
2. Complete the Source required field as shown below.

---

Service

Source ▶	<input type="text"/>	Priority ▶	<input type="text"/>	Delivery ▶	<input type="text"/>		
▶ Service	<input type="text"/>		▶ Quantity	▶ Request Reason		Other specify	
<input type="checkbox"/> Death (non-confidential)			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Certified Copy			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Non-Certified (non-confidential)			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Non-Certified Copy			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Veteran			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Disposition Permit			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Miscellaneous Fees			<input type="text"/>	<input type="text"/>		<input type="text"/>	

3. Complete the Priority required field as shown below.

---

Service

Source ▶	<input type="text"/>	Priority ▶	<input type="text"/>	Delivery ▶	<input type="text"/>		
▶ Service			▶ Quantity	▶ Request Reason		Other specify	
<input type="checkbox"/> Death CC Short (non-confidential)			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Certified Copy			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Non-Certified (non-confidential)			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Non-Certified Copy			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Death Veteran			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Disposition Permit			<input type="text"/>	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Miscellaneous Fees			<input type="text"/>	<input type="text"/>		<input type="text"/>	

4. Complete the Delivery required field as shown below.

Service

Source ▶  Priority ▶  Delivery ▶

▶ Service ▶ Quantity ▶ Request Reason ▶ Other specify

<input type="checkbox"/> Death CC Short (non-confidential)	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Death Certified Copy	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Death Non-Certified (non-confidential)	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Death Non-Certified Copy	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Death Veteran	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Disposition Permit	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Miscellaneous Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>

Calculate Fees

5. Select a service(s) from the Service required field, key in a required Quantity and select a required Request Reason from the dropdown as shown below.

Service

Source ▶  Priority ▶  Delivery ▶

▶ Service ▶ Quantity ▶ Request Reason ▶ Other specify

<input type="checkbox"/> Death CC Short (non-confidential)	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Death Certified Copy	10	Probate Will	<input type="text"/>
<input type="checkbox"/> Death Non-Certified (non-confidential)	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Death Non-Certified Copy	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Death Veteran	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Disposition Permit	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Miscellaneous Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>

Calculate Fees

Payment Section:

6. Select the Calculate Fees button twice as shown above, and DAVE™ will calculate the cost of the order as shown below.

Payments

Credit Card

Electronic Funds Transfer

Cash

Check/Money Order

Number  Payment

SubTotal:	\$69.00
Total:	= \$69.00
Paid:	\$0.00
Balance:	= \$69.00
Change Due:	\$0.00

Note: At this time, only Cash or Check/Money Order are available.

If Cash is selected as the method of payment, the system will automatically complete the Payment box as shown below:

Payments

- Credit Card
- Electronic Funds Transfer
- Cash
- Check/Money Order

Number  Payment

SubTotal: \$69.00  
Total: = \$69.00  
Paid: \$0.00  
Balance: = \$69.00  
Change Due: \$0.00

Note: A balance due will be shown at this time. Later, when the Save and Validate button is selected, the balance will change to \$0.00 due.

7. If Check/Money Order is selected, enter the check number. If the check number is not known enter 99999. If someone is calling in the order ask them on the phone for the check number.

Payments

- Credit Card
- Electronic Funds Transfer
- Cash
- Check/Money Order

Number   Payment

SubTotal: \$69.00  
Total: = \$69.00  
Paid: \$0.00  
Balance: = \$69.00  
Change Due: \$0.00

---

## Exercise 6.9 – Event Requested Section

### Event Requested Section:

This section is a recap of the Event Type, Applicant Relationship and the Status on the case.

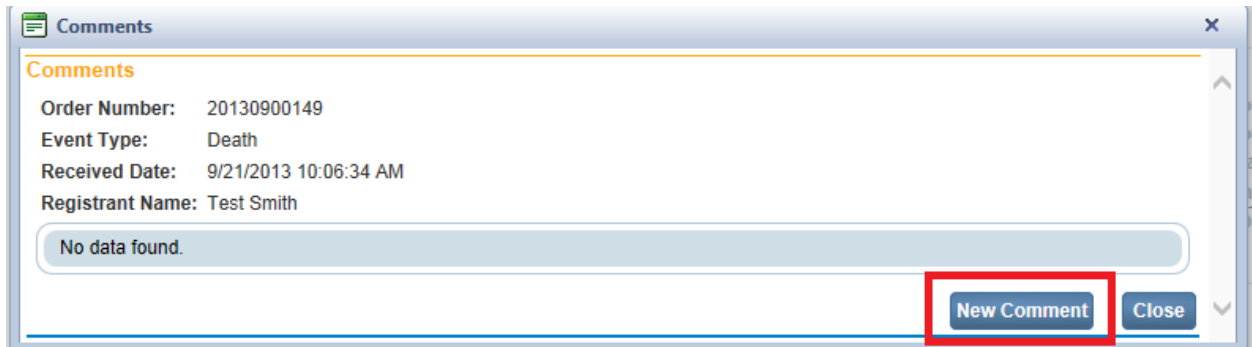
---

Event Requested			
Event Type:	Death	Correspondence	<b>Receipt</b> Mailing Envelope Mailing Label
Relation:	Funeral Director		
Status:	/Personal Valid/Medical Valid/Registered/NA/NA/NA/ICD Coding Required		
<b>Comments:</b>			

---

1. Select the blue receipt link above to provide a copy of the receipt to the customer.
2. If a comment needs to be added regarding this order, select the blue Comments link shown above. Selecting the Comments link will open the dialog box below. If there have been no previous comments on this order, it will show “no data found”.

NOTE: (Currently once a comment is saved and then closed, DAVE™ will return to a blank order. This issue has been reported and we hope it is resolved in the 14.1 upgrade.)



Comments

Order Number: 20130900149  
Event Type: Death  
Received Date: 9/21/2013 10:06:34 AM  
Registrant Name: Test Smith

No data found.

New Comment Close

3. To add a comment, select the New Comment button above and the dialog box will be redrawn as shown below.
4. Select a Comment Type, type in the comment and select the SAVE button, or Clear or Cancel the information.

**Comments**

Order Number: 20130900149  
 Event Type: Death  
 Received Date: 9/21/2013 10:06:34 AM  
 Registrant Name: Test Smith

No data found.

Enter New Comment

Comment Type: Order Processing

Comment: This is a test.

Maximum text length: 4000 Characters left: 3985

Save  
 Clear  
 Cancel

New Comment Close

5. If a comment is entered and the Save button is selected, the next screen provides an opportunity to either edit or delete the comment as shown below. Select Close to go back to the Order.

**Comments**

Order Number: 20130900149  
 Event Type: Death  
 Received Date: 9/21/2013 10:06:34 AM  
 Registrant Name: Test Smith

Comment Type	Date Entered	Entered By	Comment
Order Processing	09/21/2013	Trainmccs	This is a test.

Total records : 1

Edit Delete

New Comment Close

---

## Exercise 6.10 – Matched Event Section

### Matched Events Section:

The Matched Events section is a recap of the order as shown below.

Matched Events				Services					
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee	Issue
Test Smith	Yes	0		Death Certified Copy	10	REGULAR	MAIL	\$69.00	<a href="#">Issue</a>

[Next Order](#) [Copy to New](#) [Take me to Regular Order](#) [Void](#) [Issuance History](#) [Clear](#) [Save & Validate](#)

You must select the Save & Validate button to enable the Issue link

1. Under the Registrant and Match columns shown in the red box above, the Registrant name and Yes should be displayed indicating a Matching Event was found. This reinforces that the system found a “matching event” on the record you requested.
2. The Total Number of Issuances column shows a total of all issuances ever requested for this registrant. In the example above, there have been no prior issuances as indicated with a zero.
3. The Date of Last Issuance shows the date the last issuance was done on this record. In the example above, there have been no prior issuances so there is no date shown.
4. In the right half section of the box pictured above, is the service(s) and quantity requested on this order.
5. To complete the application select the Save & Validate button. If the Save & Validate button is not selected, the blue issue link shown pictured above will remain disabled, and the Issuance page will not be displayed.

If there are any issues with the record, selecting the Save & Validate button will bring up any error messages. Until the error(s) are resolved, the Issue link will remain disabled.

Below is an example of an error that should be resolved before proceeding with the issuance.

The error message states there is an “incomplete amendment” associated with this record. Do not issue this record until the amendment is completed. Otherwise, the customer would be paying for a certificate that is in the process of being amended, and would have to pay again to get the completed amended certificate.

Validation Results			
Error Message	Event Id	Service Id	Override
OP0085: Incomplete amendment associated with this record. Save Override Validation Rule to Complete Process	1		<input type="checkbox"/>

Save Overrides Hide

Records that have begun the amendment process are normally completed the same day. Check back later, and should you still see this error message, please contact the EDRS Support Application Specialist at 1-888-664-9491 – option 7.

- In some cases, the error message may not be as significant as the example provided above, and can be overridden.
- To override the error, select the checkbox shown under the Override column above, and select the Save Overrides button shown above.
- Select the Save & Validate button again.

The application is now complete. However, the order is not yet complete until the issuance (printing the certificate) is done.

Please note that at the top of the order processing screen, the order number (20130900153) and the status of the order (/Order Valid/Incomplete) is shown as below. Do not confuse the order number with the state file number. The order is showing “incomplete” because the issuance is not done yet, or the last step of the issuance was not done which is described below. When you are finished the application and the issuance, the status will change from Incomplete to Complete.

20130900153 :Test Case  
/Order Valid/Incomplete

Death Fast Order

Applicant:  Person  Organization ID Type:  Other:   Expedite Order



## Exercise 6.11 – Issuances

1. From the application page completed above, select the Issue link as shown below.

Matched Events				Services					
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee	
Test Smith	Yes	0		Death Certified Copy	12	REGULAR	MAIL	\$81.00	<b>Issue</b>

**Next Order** **Copy to New** **Take me to Regular Order** **Void** **Issuance History** **Clear** **Save & Validate**

2. The issuance dialog box will open as shown below.

### Issuance

#### Issuances

<input checked="" type="checkbox"/>	All	Applicant Name	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625			
<input checked="" type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625			
<input checked="" type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625			
<input checked="" type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625			

Total records : 4

**Actions**  
**Print** **Delete** **Void** **Complete**

**Numbering**  
AutoNumber Ascending  
AutoNumber Descending  
Beginning Number

**Save** **Close**

There are three (3) steps to the issuance. **The order of these steps is very important.** Please review these three steps before beginning.

### Step 1 – Print the certificate

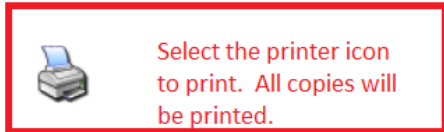
- a. Put safety paper in the printer. If making multiple copies, it will help if the safety paper numbers shown on the back of the safety paper are all in numeric order.

- b. Select the record by placing a checkmark on the row of the record. Or, if there are many records (rows), to avoid having to check each one individually, select the “All” column name as shown above. Selecting “All” will automatically check all the records (rows).
- c. Select the Print button at the bottom of the issuance screen as shown above. A dialog box will open asking if you want to Open, Save or Cancel as shown below. (Note: the dialog box may appear different on your computer.)
- d. Select Open. The certificate(s) will appear.

Do you want to open or save **Issuances.pdf** (124 KB) from **gatewaytest.maine.gov**?

Open Save Cancel

- e. Select the Printer icon shown below. It will print all copies.



NAME KNOWN TO PHYSICIAN		DEPARTMENT OF HEALTH AND HUMAN SERVICES						2013-508625	
		CERTIFICATE OF DEATH						State File Number	
DECEDENT	1a. FIRST NAME Test	1b. MIDDLE NAME			1c. LAST NAME Smith		1d. JR., etc.		
	2. DATE OF DEATH Actual date of death September 21, 2013	3. SEX Male	4. SOCIAL SECURITY NUMBER Unknown	5a. AGE (Yrs) 102 <i>Last Birthday</i>	5b. UNDER 1 YEAR Month: Day: Hour: Minute:	5c. UNDER 1 DAY Hour: Minute:	6. DATE OF BIRTH June 02, 1911		
	7. BIRTHPLACE Augusta, Maine			8. WAS DECEDENT EVER IN U.S. ARMED FORCES? No		9. PLACE OF DEATH Decedent's Home			
	10. FACILITY NAME Unknown			11. COUNTY OF DEATH Kennebec		12. CITY OR TOWN OF DEATH Augusta			
	13. MARITAL STATUS Never Married		14. SURVIVING SPOUSE/PARTNER		15. DECEDENT'S USUAL OCCUPATION Teacher		16. KIND OF BUSINESS / INDUSTRY / EDUCATION		
	17. EDUCATION Master's Degree		18. ANCESTRY Unknown		19. RACE White				
	20. RESIDENCE		21. RESIDENCE COUNTY		22. RESIDENCE CITY OR TOWN		23. RESIDENCE STREET AND NUMBER		

Certificates have now printed. Close the adobe file (file containing the certificates). On the Issuance page, under the Date Printed column the date printed will be shown as below.

**Issuances**

All	Applicant Name	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625		Sep-21-2013

Step 2 – Add the Safety Paper

- a. Select the “All” button, or place a checkmark on each record (row).
- b. Key into the Beginning Number box the first safety paper number as shown below. There is no need to type in the leading zeroes. Then, select the AutoNumber Ascending link shown below. (Only use this method if all the safety papers printed

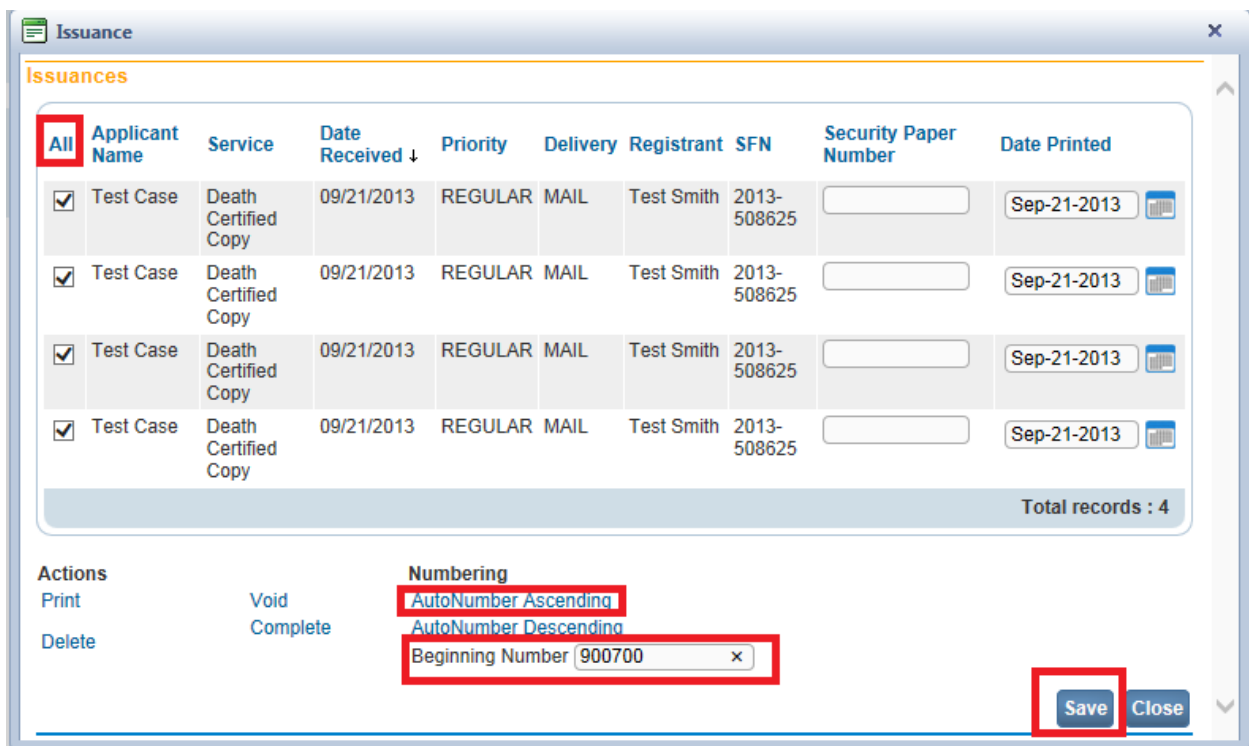
in Step 1 above are in numeric order.) The numbers will system-fill under the Security Paper Number boxes.

OR, if the safety paper printed is not in numeric order:

Type in the safety paper numbers in each of the Security Paper Number boxes.

- c. Select the SAVE button at the bottom of the screen and shown below.

If the leading zeroes were not keyed in, the system has automatically added them in the Security Paper Number boxes as shown further below.



The Security Paper Number leading zeroes were automatically added in by the system.

Issuance

Issuances

All	Applicant Name	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900700	Sep-21-2013
<input type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900701	Sep-21-2013
<input type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900702	Sep-21-2013
<input type="checkbox"/>	Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900703	Sep-21-2013

Total records : 4

**Actions**  
 Print                      Void  
 Delete                      Complete

**Numbering**  
 AutoNumber Ascending  
 AutoNumber Descending  
 Beginning Number

Save Close

Step 3 – Complete the issuance/order

- Select “All”, or select each one of the checkboxes for each record (row).
- Select the Complete button as shown below.
- You will automatically be returned to the Order Summary page.

**IMPORTANT:** Only 10 copies show on a page. Therefore, if 12 copies of a certificate were requested, repeat steps 1, 2 and 3 above for the second page of the issuance in order to complete the remaining two records (row). Click on the 2 as shown below to get to the 2<sup>nd</sup> page of the issuance, and complete the above steps 1, 2 and 3 again for the last two records.

<input type="checkbox"/>	Test Cse	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	<input type="text"/>	<input type="text"/>	
--------------------------	----------	----------------------	------------	---------	------	------------	-------------	----------------------	----------------------	--

First 1 **2** Last

Total records : 12

Issuance

Issuances

<input checked="" type="checkbox"/>	All	Applicant Name	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>		Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900700	Sep-21-2013
<input checked="" type="checkbox"/>		Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900701	Sep-21-2013
<input checked="" type="checkbox"/>		Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900702	Sep-21-2013
<input checked="" type="checkbox"/>		Test Case	Death Certified Copy	09/21/2013	REGULAR	MAIL	Test Smith	2013-508625	000000900703	Sep-21-2013

Total records : 4

Actions  
 Print  
 Delete

Numbering  
 AutoNumber Ascending  
 AutoNumber Descending  
 Beginning Number

When selecting the Complete button, DAVE™ will return to the Order Summary section of the application.

On the Order Summary page the status will change from “Incomplete” to “Completed”.

20130900153 :Test Case  
 /Order Valid/Completed  
 Order Summary

Source: Mail  
 Received Date: SEP-21-2013

ProCheck / ProID Status:  
 Fee Effective Date: SEP-21-2013

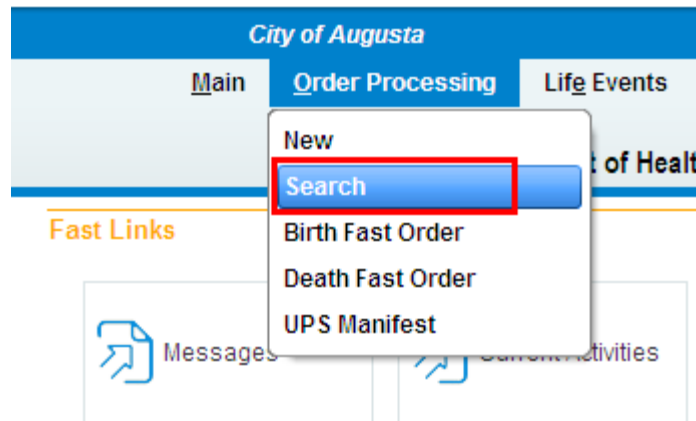
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## Section 7: Search For Existing Orders

**Skill Learned:** How to locate and use the **Order Processing -> Search** functionality. The previous section detailed the steps necessary to create and process a new vital records order. This section covers the steps required to search for, and access an existing order.

### Exercise 7.1 – Order Processing Search Menu

1. From the **Home** page select **Order Processing -> Search**. The **Search for an order** page will display.



There are 4 search options to choose from: **Search by Order**, **Search by Event Requested**, **Search by Applicant**, and **Search by Matched Event**.

Search for an order

**Search By Order**

Order Number:	<input type="text"/>
Security Paper Number:	<input type="text"/>
Tracking Number:	<input type="text"/>
Received between	<input type="text"/>  and <input type="text"/> 

**Search by Event Requested**

First Name:	<input type="text"/>
Last Name:	<input type="text"/>

**Search by Applicant**

Organization Name:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Phone:	<input type="text"/>

**Search by Matched Event**

Event Type:	<input type="text" value="Death"/>
Search Criteria 1:	<input type="text"/>
Value 1:	<input type="text"/>
Search Criteria 2:	<input type="text"/>
Value 2:	<input type="text"/>



Maximum records to display:

## Exercise 7.2 – Search by Order

**Skill Learned:** How to search for an order based on order specific criteria.

### Search for an order

#### Search By Order

Order Number:	<input type="text" value="20131100020"/>
Security Paper Number:	<input type="text"/>
Tracking Number:	<input type="text"/>
Received between	<input type="text"/>  and <input type="text"/> 

1. To **Search by Order**, you must input at least one of the required pieces of information: **Order Number**, **Security Paper Number**, or **Tracking Number**.

Additionally, you can elect to search by date range by entering a range of dates in the **Received between** and the **Calendar** controls. Click the **Search** button at the bottom of the page.

2. Except when using date range fields, a successful **Search by Order** will always return a single order. This order number search above returns the following results:

#### Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20131100020	NOV-08-2013	Test Smith	Death	2013-508625	Test Smith

Total records : 1



Click the Order Number link to open this order for review/editing.

New Search

3. To open this order, click the [Order Number](#) link.
4. To search based on **Received between** dates you must enter a valid range of dates.

### Search for an order

#### Search By Order

Order Number:	<input type="text"/>
Security Paper Number:	<input type="text"/>
Tracking Number:	<input type="text"/>
Received between	<input type="text" value="Nov-01-2013"/>  and <input type="text" value="Nov-08-2013"/> 

- Click the **Search** button at the bottom of the page to initiate the search. The search outlined above returned the following results.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
<a href="#">20131100020</a>	NOV-06-2013	Cynthia Carter	Birth	2013500893	Herman Homes
<a href="#">20131100019</a>	NOV-06-2013	Cynthia Carter	Birth	2013500893	Herman Homes
<a href="#">20131100018</a>	NOV-06-2013	Cynthia Carter	Birth	2013500893	Herman Homes
<a href="#">20131100017</a>	NOV-06-2013	Cynthia Carter	Birth	2013500893	Herman Homes
<a href="#">20131100008</a>	NOV-06-2013	Cynthia Carter	Birth	2013500893	Herman Homes

Total records : 5

Click any Order Number link to open the order for review/editing.

[New Search](#)

### Exercise 7.3 – Search by Event Requested

**Skill Learned:** How to search for records based on vital event registrants. The registrant is the person whose name appears on the certificate to be printed.

**Search by Event Requested**

First Name:

Last Name:

- Begin by entering the vital event registrant's **First Name** and **Last Name** and click the **Search** button.

- On the results page, click any [Order Number](#) link to open the order for review/editing. In the example below only one record was returned.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
<a href="#">20131009036</a>	OCT-17-2013	Sally Smith	Death		Joe Smith

Total records : 1

Click the Order Number link to open the order for review/editing.

[New Search](#)



## Exercise 7.4 – Search By Applicant

**Skill Learned:** How to search for an order based on the person or organization that originally placed the order.

Search by Applicant

Applicant is the “customer” making the request.

Organization Name:	<input type="text"/>
First Name:	<input type="text" value="Bob"/>
Last Name:	<input type="text" value="Peters"/>
Phone:	<input type="text" value="___-___-___"/>

1. To search by **Applicant**, you must input at least the applicant’s **Last Name**. However, to reduce the number of orders returned by a search it is highly recommended that both **First Name** and **Last Name** are entered.

2. Supplying additional information such as **Phone Number** and/or **Organization Name** will further narrow the scope of the records returned.
3. Applicant based searches may not always be successful. When they are successful, they can return one or many records. This search returns the following results:

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
<a href="#">20131000044</a>	OCT-23-2013	Bob Peters	Death	2013508626	Joe Peters
<a href="#">20131000041</a>	OCT-18-2013	Bob Peters	Death	2013508626	Joe Peters

Total records : 2

New Search

Click any Order Number link to open the order for review/editing.

Two records were returned with Applicant name “Bob Peters”.

4. Click any underlined [Order Number](#) link to open an order.
5. Searching by applicant **First Name** only will generate an error message.

Search by Applicant

Organization Name:	<input type="text"/>	Death	<input type="text"/>
First Name:	<input type="text" value="Bob"/>	<input type="text"/>	<input type="text"/>
Last Name:	<input type="text"/>	Value 1:	<input type="text"/>
Phone:	<input type="text" value="___-___-___"/>	Search Criteria 2:	<input type="text"/>
		Value 2:	<input type="text"/>

Message from webpage

Invalid Search Criteria. Last Name is required.

OK

---

## Exercise 7.5 – Search By Matched Event

**Skill Learned:** How to search for an order based on the specific vital event: birth, death, etc.

**Search by Matched Event**

This is the same as the "Registrant"...the name on the record.

Event Type:

Search Criteria 1:

Value 1:

Search Criteria 2:

Value 2:

Decedent's First Name  
Decedent's Middle Name  
Decedent's Last Name  
Decedent's Suffix  
Decedent's Gender  
Decedent's Date of Birth  
Decedent's SSN  
Date of Death

1. To search for an order by the matched event, you must first select an event from the **Event Type** dropdown list. Death is the default event type.

2. Next, make a selection from **Search Criteria 1**.
3. Enter the corresponding value in **Value 1**. For example, if you select **Decedent's First Name** for **Search Criteria 1**, then you would enter the decedent's first name in **Value 1**. When searching by event, a valid **Search Criteria 1** with corresponding **Value 1** data must be entered.
4. However, when searching based on **Decedent's First Name**, you must also select **Decedent's Last Name** as **Search Criteria 2** and complete the **Value 2** field.
5. Searching on **Decedent's First Name** only will generate an error message.
6. Enter valid entries for one or more **Search Criteria** and **Value** fields and click the **Search** button to proceed.

### Search by Matched Event

Event Type:

Search Criteria 1:

Value 1:

Search Criteria 2:

Value 2:

### Search by Matched Event

Event Type:	<input type="text" value="Death"/>
Search Criteria 1:	<input type="text" value="Decedent's First Name"/>
Value 1:	<input type="text" value="Test"/>
Search Criteria 2:	<input type="text" value="Decedent's Last Name"/>
Value 2:	<input type="text" value="Smith"/>

7. Event based searches may not always be successful. When they are successful, they can return one or many records. In our example, the results will include all orders for Test Smith's Death Certificate. This search returns the following results:

### Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
<a href="#">20131000042</a>	OCT-21-2013	Cell Test	Death	2013-508625	Test Smith

Click on the Order Number link to open the order for review/editing.

[New Search](#)

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

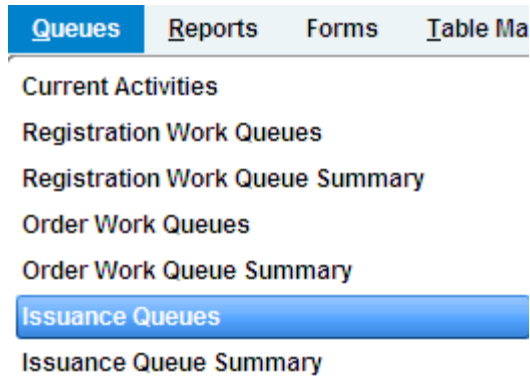
## Section 8: Issuance Queues

**Issuance Queues** are used primarily to print certified copies of vital records. As orders for certified copies are created, they are often printed at the time the order is placed. Using issuance queues, a user can retrieve unfulfilled orders and print them individually or in batch.

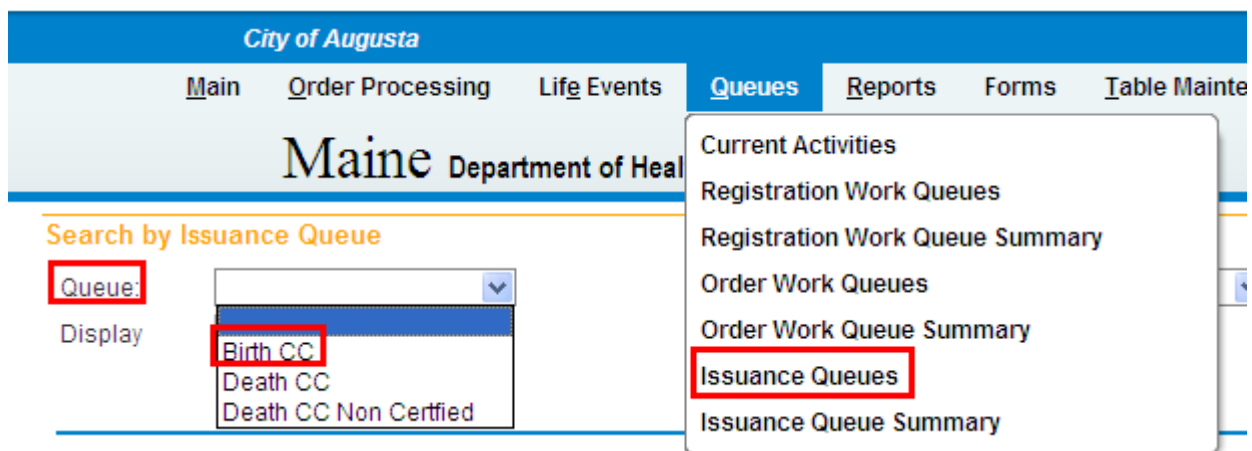
### Exercise 8.1 – Search

**Skill Learned:** How to search for an order using the Issuance Queue.

1. From the **Home** page, select **Queues -> Issuance Queues** to open the **Search by Issuance Queue** page.

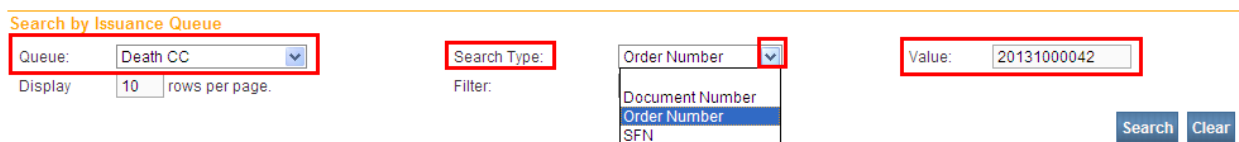


- Click on the **Queue** dropdown list to display the list of **Queue Names**. In the example below there are three queue names: Birth CC, Death CC and Death CC Non Certified.



**Note: Queues is determined by the individual user's security configuration.**

- Select from the **Search Type** dropdown list.



- Next, enter a corresponding **Value**. Since **Order Number** was selected in the **Search Type** dropdown, a valid order number should be entered in the **Value** field.
- Select the **Search** button to retrieve the record.

**Search by Issuance Queue**

Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:

No data found. **No data was found for this order.**

**Actions**  
 Print  
 Batch Print  
 Print Receipt  
 Print UPS Label Batch  
 Delete

**Void**  
 Complete

**Numbering**  
 AutoNumber Ascending  
 AutoNumber Descending  
 Beginning Number

6. Another way to search for records in the **Issuance Queue** is to use the **Filter** option. On the **Search by Issuance Queue** page, select the **Filter** dropdown list and select **Non Expedited**.

**Search by Issuance Queue**

Queue:  Search Type:  Value:   
 Display:  rows per page. **Filter:**

Batch  
Business Unit  
Non Expedited  
Priority

**Search by Issuance Queue**

Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:

All	Applicant Name	Order Number	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Staples Funeral Home	20100800149	Disposition Permit	08/18/2010	REGULAR	Counter	Milagros Reeder	2010050144		<input type="text"/>

7. All Non Expedited records will appear.

### Exercise 8.2 – Single Record Printing

**Skill Learned:** How to print a single record using the **Issuance Queue**.

1. On the **Search by Issuance Queue** page, enter the search criteria using the steps outlined above.
2. When the search results are displayed, place a checkmark in the checkbox in the All column for the record you want to print.

Search by Issuance Queue

Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:

[Search](#) [Clear](#)

All	Applicant Name	Order Number	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Staples Funeral Home	20100800149	Disposition Permit	08/18/2010	REGULAR	Counter	Milagros Reeder	2010050144		<input type="text"/>
<input type="checkbox"/>	Knowlton & Hewins Funeral Home (Augusta)	20101000085	Disposition Permit	10/07/2010	REGULAR	Counter	Kayden McGarry	2010050309		<input type="text"/>
<input type="checkbox"/>	Riposta Funeral Home	20101000104	Disposition Permit	10/12/2010	REGULAR	MAIL				<input type="text"/>
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20101000171	Disposition Permit	10/18/2010	REGULAR	Counter	Hunter McCallum	2010050341		<input type="text"/>
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20101200079	Disposition Permit	12/08/2010	REGULAR	Counter	Hezekiah Weathersby	2010050544		Dec-08-2010
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20101200081	Disposition Permit	12/09/2010	REGULAR	Counter	Hezekiah Weathersby	2010050544		<input type="text"/>
<input type="checkbox"/>	Knowlton & Hewins Funeral Home (Augusta)	20101200191	Disposition Permit	12/17/2010	REGULAR	Counter	Giuliana Le	2010050589		<input type="text"/>
<input type="checkbox"/>	Knowlton & Hewins Funeral Home (Augusta)	20101200199	Disposition Permit	12/17/2010	REGULAR	Counter	Giuliana Le	2010050589		<input type="text"/>
<input type="checkbox"/>	Kincer Funeral Home Vault	20101200213	Disposition Permit	12/20/2010	REGULAR	MAIL	Natalee Newsome	2010050601		<input type="text"/>
<input type="checkbox"/>	Kincer Funeral Home (Richmond)	20101200217	Disposition Permit	12/20/2010	REGULAR	MAIL	Natalee Newsome	2010050601		<input type="text"/>

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 251

[Actions](#) [Numbering](#)  
[Print](#) [Void](#) [AutoNumber Ascending](#)

- Click the [Print](#) link to print the actual certificate.
- Clicking [Print](#) will launch the Windows file download dialog box. Select **Open** to open the .pdf file and print the certificate.

Search by Issuance Queue


Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:


[Search](#) [Clear](#)


All	Applicant Name	Order Number	Service	Date	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Staples Funeral Home	20100800149	P					0050144		<input type="text"/>
<input type="checkbox"/>	Knowlton & Hewins Funeral Home (Augusta)	20101000085	P					0050309		<input type="text"/>
<input type="checkbox"/>	Riposta Funeral Home	20101000104	P							<input type="text"/>
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20101000171	P					0050341		<input type="text"/>
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20101200079	P					0050544		Dec-08-2010
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20101200081	P					0050544		<input type="text"/>
<input type="checkbox"/>	Knowlton & Hewins Funeral Home (Augusta)	20101200191	P					0050589		<input type="text"/>

**File Download**

Do you want to open or save this file?

 Name: Issuances.pdf  
 Type: Adobe Acrobat Document, 124KB  
 From: gatewaytest.maine.gov

 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

- When the Certificate is displayed, select the printer icon (  ) to print the certificate.



NAME KNOWN TO PHYSICIAN		DEPARTMENT OF HEALTH AND HUMAN SERVICES				2012-502471	
		CERTIFICATE OF DEATH				State File Number	
1a. FIRST NAME Richard		1b. MIDDLE NAME			1c. LAST NAME Anders		1d. JR., etc.
2. DATE OF DEATH Actual date of death April 08, 2012	3. SEX Male	4. SOCIAL SECURITY NUMBER 000-00-0000	5a. AGE (Yrs) 66 Last Birthday	5b. UNDER 1 YEAR Months Days	5c. UNDER 1 DAY Hours Minutes	6. DATE OF BIRTH December 06, 1945	

6. Once the record has printed, enter the security paper number in the **Security Paper Number** field and click the **Save** button. This will save the security paper number and auto-fill the **Date Printed** field with the current date.

Search by Issuance Queue

Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:

All	Applicant Name	Order Number	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Roberta Gray	20120200807	Disposition Permit	02/15/2012	REGULAR	Counter	Desiree Jalbert	2010050337		
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20120200935	Disposition Permit	02/17/2012	REGULAR	Counter	Jovany Gilley	2012500995		
<input type="checkbox"/>	Riposta Funeral Home	20120201155	Disposition Permit	02/23/2012	REGULAR	MAIL	Selina Doherty	2012501126		
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20120300195	Disposition Permit	03/06/2012	REGULAR	Counter				
<input type="checkbox"/>	Knowlton & Hewins Funeral Home (Augusta)	20120300690	Disposition Permit	03/14/2012	REGULAR	Counter				
<input type="checkbox"/>	Knowlton & Hewins Funeral Home (Augusta)	20120300692	Disposition Permit	03/14/2012	REGULAR	Counter				
<input type="checkbox"/>	Plummer Funeral Home (Augusta)	20120301041	Disposition Permit	03/20/2012	REGULAR	Counter	Kaia Crochet	2012501806		
<input type="checkbox"/>	Direct Cremation of Maine	20120301585	Disposition Permit	03/28/2012	REGULAR	MAIL	Warren Diaz	2012502092		
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	cs7005	Nov-12-2013

7. If the **Security Paper Number** entered has already been used, an error message will be displayed. Re-check the paper number, enter the correct number, and select **Save**.

<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471		Nov-12-2013
--------------------------	------------------------	-------------	----------------------	------------	---------	---------	----------------	------------	--	-------------

Security paper 7006 not found. Please reenter number.

## Delete

- If a record needs to be deleted, place a checkmark in the checkbox next to the record, and 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.

**Search by Issuance Queue**

Queue:  Search Type:  Value:   
Display:  rows per page. Filter:

All	Applicant Name	Order Number	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS0000007005	Nov-12-2013
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471		Nov-12-2013

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 191

**Actions**  
Print  
Batch Print  
Print Receipt  
Print UPS Label Batch  
**Delete**

**Numbering**  
AutoNumber Ascending  
AutoNumber Descending  
Beginning Number

## Void

- If a certificate did not print properly and needs to be voided, place a checkmark in the checkbox for the record that needs to be voided, and use the [Void](#) link to void the security paper number and reprint a new certified copy.

**Search by Issuance Queue**

Queue:  Search Type:  Value:   
Display:  rows per page. Filter:

All	Applicant Name	Order Number	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS0000007005	Nov-12-2013
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471		Nov-12-2013

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 191

**Actions**  
Print  
Batch Print  
Print Receipt  
Print UPS Label Batch  
Delete

**Numbering**  
AutoNumber Ascending  
AutoNumber Descending  
Beginning Number



## Complete

- Once the certified copy is printed and distributed to the customer, place a checkmark in the checkbox next to the record, and select the [Complete](#) link to mark the transaction Complete. This is the final step in processing an order. Once an order has been marked complete, the [Print](#) will be disabled.

### Search by Issuance Queue

Queue:  Search Type:  Value:   
Display:  rows per page. Filter:

All	Applicant Name	Order Number	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS0000007005	Nov-12-2013
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471		Nov-12-2013

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 191

#### Actions

Print  
Batch Print  
Print Receipt  
Print UPS Label Batch  
Delete

#### Numbering

AutoNumber Ascending  
AutoNumber Descending  
Beginning Number

## Numbering

- [AutoNumber Ascending](#) – this feature is used to assign security paper numbers to a group of certified copies in sequential ascending order.  
[AutoNumber Descending](#) – this 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.

The safety paper numbers will auto fill.

**Search by Issuance Queue**

Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:

<input checked="" type="checkbox"/>	Applicant Name	Order Number	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text"/>	<input type="text"/>

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 191

Actions

Print	Void	<b>Numbering</b>
Batch Print	Complete	AutoNumber Ascending
Print Receipt		AutoNumber Descending
Print UPS Label Batch		Beginning Number <input type="text" value="CS7006"/>
Delete		

All	Applicant Name	Order Number	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS7006	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS7007	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS7008	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS7009	<input type="text"/>

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 191

Actions

Print	Void	<b>Numbering</b>
Batch Print	Complete	AutoNumber Ascending
Print Receipt		AutoNumber Descending
Print UPS Label Batch		Beginning Number <input type="text" value="CS7006"/>
Delete		

By keying in a beginning number and selecting AutoNumber Ascending, the Safety Paper numbers are auto filled. Select SAVE.

**Exercise 8.3 – Batch Printing**

**Skill Learned:** How to process print jobs in **Batch**.

1. On the **Search by Issuance Queue** page, enter the search criteria using the steps outlined above.
2. When the search results are displayed, click the **All** link located at the top of the search results grid. Notice that this automatically places checkmarks in the **All** column of each record displayed.

Search by Issuance Queue

Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:

[Search](#) [Clear](#)

	Applicant Name	Order Number	Service	Date Received ↓	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text" value="CS7006"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text" value="CS7007"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text" value="CS7008"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text" value="CS7009"/>	<input type="text"/>

[First](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[6](#)
[7](#)
[8](#)
[9](#)
[10](#)
[...](#)
[Last](#)
Total records : 191

Actions

- [Print](#)
- [Batch Print](#)
- [Print Receipt](#)
- [Print UPS Label Batch](#)
- [Delete](#)

Numbering

- [AutoNumber Ascending](#)
- [AutoNumber Descending](#)
- Beginning Number

[Save](#)

- Next, select the [Batch Print](#) link at the bottom of the **Search by Issuance Queue** page.

**Search by Issuance Queue**

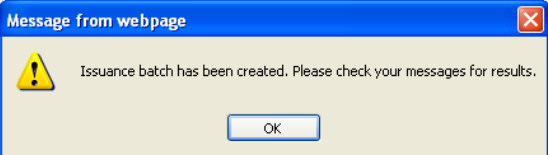
Queue:  Search Type:  Value:   
 Display:  rows per page. Filter:  Batch Filter:  Value:

All	Applicant Name	Order Number	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy						<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy						<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy						<input type="text"/>	<input type="text"/>

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 191

**Actions**  
 Print Void  
 Batch Print Complete  
 Print Receipt  
 Print UPS Label Batch  
 Delete

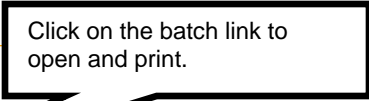
**Numbering**  
 AutoNumber Ascending  
 AutoNumber Descending  
 Beginning Number



- The message “Issuance batch has been created. Please check your messages for results” will be displayed. Once the batch job is created and a message is sent to the user, the user can then print from the job.

**Messages**

From	Message Text	Date Sent	<input type="checkbox"/>
Sofia Simms	Batch print file for the Death CC has been created. 10 issuances took 0 minutes, 4 seconds to generate the pdf file. <a href="#">Death CC batch 1 of 1</a> (358kb)	11/13/2013 8:41:24 AM	<input type="checkbox"/>



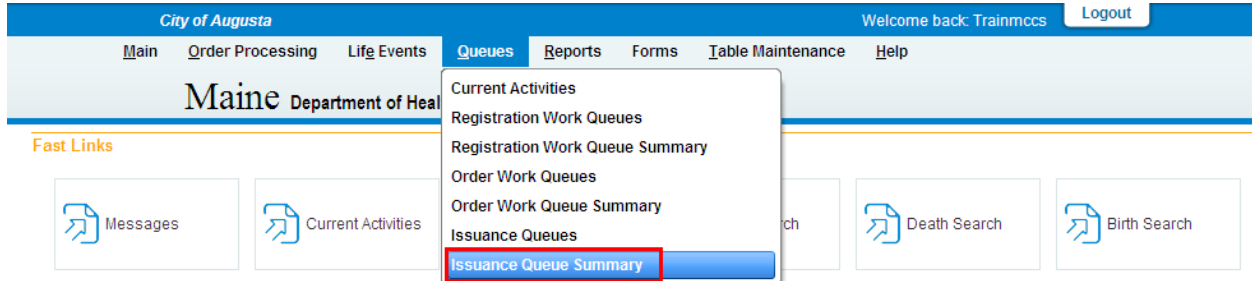
- In the previous single record print exercise, after printing, the **Security Paper Number** was manually entered. However, for batch printing we can use the [AutoNumber Ascending](#) or [AutoNumber Descending](#) links to assign multiple security numbers at once. With the printed documents in hand, note the paper number of the first certificate and enter that into the **Beginning Number** field.
- Click either the [AutoNumber Ascending](#) link or the [AutoNumber Descending](#) link to auto-fill the **Security Paper Number** fields for all of the other selected documents incrementally.
- Verify that all security numbers have been assigned accurately, and select the **Save** button. Clicking the **Save** button also fills in the **Date Printed** column with the current system date.
- After the batch print job has been run and the **Security Paper Numbers** saved to the database, click on the All column to select all records, or place a checkmark in the checkbox next to the records you ran in the batch file, and click the [Complete](#) link.

## Exercise 8.4 – Issuance Queue Summary

**Skill Learned:** How to search for an order using the **Issuance Queue Summary** link.

The **Issuance Queue Summary** can be useful when a user does not have enough information to search for a record. Also, the **Issuance Queue Summary** page can be used as a “to-do” list of records that need to be worked.

1. From the **Home** page select **Queues -> Issuance Queue Summary**.



2. **Queue Name** displays the names of the various queues that comprise the **Registration Work Queue**. **Count** indicates the number of records in the corresponding queue. **Age of Oldest** indicates the age of the oldest record in that queue. Select **Death CC** to display the specific work queue for Death CC.

**Issuance Queue Summary**

Queue Name	Count	Age of Oldest
Birth CC	1	40
Death CC	191	578
Death CC Non Certified	1	349
Total Queues : 3		

**Search by Issuance Queue**

Queue: **Death CC** Search Type: [ ] Value: [ ]  
 Display: 3 rows per page. Filter: [ ]

**Search** **Clear**

All	Applicant Name	Order Number	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	CS0000007005	Nov-12-2013
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	[ ]	Nov-12-2013 [ ]
<input type="checkbox"/>	Stetson's Funeral Home	20120400641	Death Certified Copy	04/13/2012	REGULAR	Counter	Richard Anders	2012502471	[ ]	[ ] [ ]

First 1 2 3 4 5 6 7 8 9 10 ... Last Total records : 191

**Actions**  
 Print Void  
 Batch Print Complete  
 Print Receipt  
 Print UPS Label Batch  
 Delete

**Numbering**  
 AutoNumber Ascending  
 AutoNumber Descending  
 Beginning Number [ ]

**Save** **Return**

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## Appendices

### Appendix 1 – Glossary of Icons and Controls

There are several different types of **icons** and **controls** used in **DAVE™**. Many of these are industry-standard or universal controls that you may already be familiar with from using other programs and/or websites. Others, are **DAVE™** specific controls that you will not find anywhere else.



- **Auto-populate Button** – this control can be clicked on using your mouse’s left click button. This control is used in conjunction with a dropdown list to auto-fill information relevant to the entity selected within the dropdown list.

**Auto-populate** - **Auto-populate Tool Tip**: this is an onscreen tool-tip that appears whenever the cursor is allowed to ‘hover’ over an Auto-populate button. This is simply a visual indicator that the auto-populate feature can be used.



**Calendar**: this is an onscreen control containing several other controls. There are two dropdown lists, one for selecting the month and the other for selecting the year. The default calendar displayed will be for the current month and year with the current day displayed in red. Clicking any day of any date will cause that date to be displayed in the corresponding **Date Entry** text box using a MMDDYYYY format.



- **Calendar Icon**: this is an onscreen control that can be clicked on using your mouse’s left click button. This icon is used in conjunction with Date Entry text boxes. Clicking this icon will bring up the Calendar control that can be used to select a specific date.



- **Checkboxes**: these are universal, onscreen controls that can be clicked on using your mouse’s left click button. Checkboxes are used for making selections among various onscreen options. More than one checkbox can be selected at a time (compared to **Radio Buttons** that can only be selected one at a time.) **Checkboxes** exist in two states: **Checked** and **Unchecked**. To Check a checkbox just click in the box with your mouse. Clicking unchecked checkboxes will place a checkmark (☑) in the checkbox. Clicking a checked checkbox will remove the checkmark.

**Validate Page**

**Next**

**Clear**

**Save**

**Return**

- **Click Buttons**: these are universal controls that can be clicked on using your mouse’s left click button. They are used to accept data inputs, write

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information to databases and usually trigger the processing of underlying system code.

Person/Organization:

- **Dropdown Lists:** these are universal, onscreen controls that can be selected from using your mouse's left click button. Clicking the down-arrow button will cause a list of selectable options to dropdown. Clicking any option in the list will select it and display it in the text box field.

Person/Organization:

First:

Middle:


Last:

Gender:

SSN:


Date of Birth:  Start:

- Certifier
- Decedent
- Decedent Father
- Decedent Mother
- Decedent Surviving Spouse
- Funeral Director
- Funeral Home
- Informant
- Local Registrar
- Medical Examiner/Coroner

 - **Fix Icons:** this is an onscreen icon that appears only in the **DAVE™ Validation Frame**. Clicking this icon will send the cursor to the field containing invalid information so that it can be corrected.


First:


**Labels** –are universal controls or fields. Actually, most fields have labels. A **Label** tells you what type of information is displayed in a field or what type of information to place in a field. In our example here, the field has a label containing the word **First**. That tells you to place the Decedent's first name in this text box field.

 - **Radio Buttons:** these are universal controls that can be selected using your mouse's left click button. Clicking a radio button will fill in (●) the circle. Unlike **Checkboxes**, which allow for multiple selections, only one **Radio Button** per group of buttons may be selected at one time. For example, you might use a radio button to select a brand of car to purchase, but use checkboxes to add all the features you want.

First:

- **Text Entry Boxes:** these are universal controls used to record information. **Text Entry Boxes** can be formatted to accept only text, a combination of text and numbers, numbers only or dates. In this example, the **Text Box** is being used to record someone's **First** name. In this case, the text entry box is formatted to prevent the entry of any numbers or special characters. Some **Text-Entry Boxes** are display only.

 - **Validation Arrow-Green:** this is a display only icon. Clicking it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DAVE™** information page contains valid information.

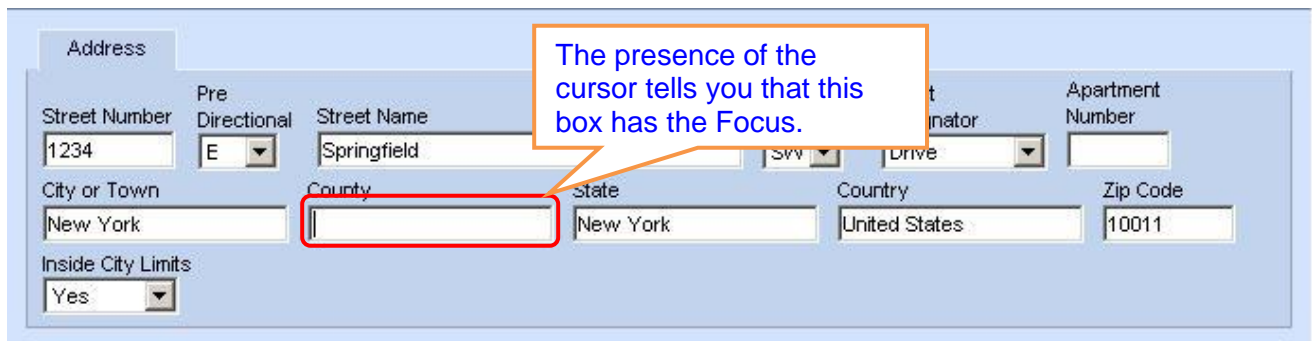
 - **Validation Arrow-Red:** this is a display only icon. Clicking it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DAVE™** information page contains invalid information that must be corrected before certification will be allowed.

▶ - **Validation Arrow-Yellow:** this is a display only icon. Clicking it has no effect. This icon is used in the **Death Registration Menu** and indicates that a **DAVE™** information page contains information that may be invalid and must be corrected or overridden before certification will be allowed.

## Appendix 2 – Usage and Common Conventions

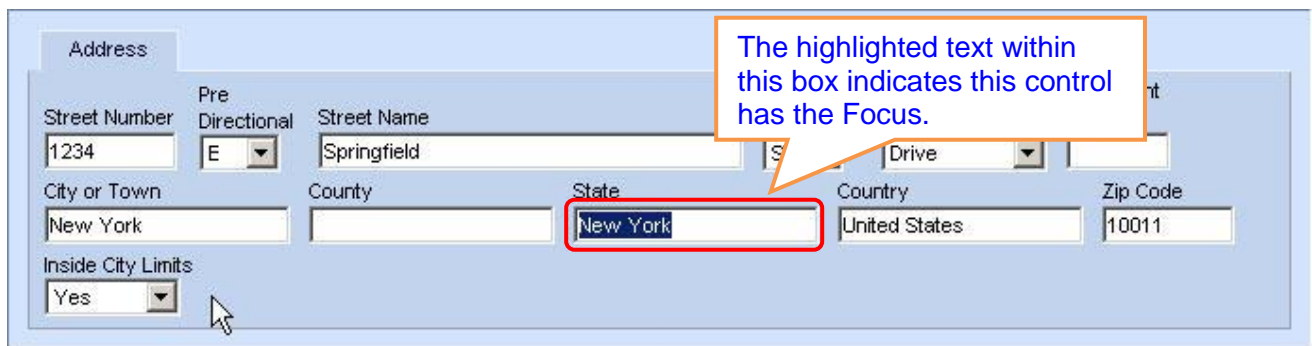
This appendix consists of useful tips and tricks to help you become a more efficient user of the **DAVE™** application. These hints will actually help you with almost any Windows based application.

1. **Focus – Focus** determines which field on the page will receive the action. For example, if an empty text box has the focus then a flashing cursor will appear in the far left hand side of the box. Anything you type will appear in the text box.



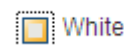
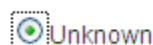
The screenshot shows an address form with the following fields: Street Number (1234), Pre Directional (E), Street Name (Springfield), Street Suffix (Srv), Drive, Apartment Number, City or Town (New York), County (empty), State (New York), Country (United States), and Zip Code (10011). There is also an 'Inside City Limits' dropdown set to 'Yes'. A red rectangular box highlights the empty County field. A callout box with a blue border and text points to this field, stating: "The presence of the cursor tells you that this box has the Focus."

If a pre-filled textbox has the focus then the text in that box will be highlighted. If you type here with the text highlighted, the current text will be deleted.



The screenshot shows the same address form as above, but now the text 'New York' in the State field is highlighted in blue. A red rectangular box highlights the State field. A callout box with a blue border and text points to this field, stating: "The highlighted text within this box indicates this control has the Focus."

If a **Checkbox** or **Radio Button** receives the focus then a dotted line will surround the checkbox or radio button.





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2. **Passing the Focus** There are two ways to pass the focus to a field: clicking the field with your mouse or pressing the **Tab** key until the desired field is highlighted.

The most common way of placing the focus on a field is by clicking the field with your mouse. This is also the slowest and least efficient way of passing the focus from one field to the next.

Instead, learn to use **Tab** and **Shift-Tab** to pass the focus back and forth among the fields. Using **Tab** will advance the focus forwards. **Shift-Tab**, which is triggered by holding down the **Shift** key while pressing the **Tab** key, will pass the focus back to the previous field.

Every page is structured a little differently. Exactly where **Tab** and **Shift-Tab** sends the Focus will vary, but it should always advance you logically from one field to the next.

3. **Keyboard Shortcuts** – Now that you understand what **Focus** is and how to pass it from one field to the next, let's see how you can use it to become a more efficient **DAVE™** user.

If a **Text Entry Box** has the **Focus**, then just start typing to fill in the box. Note: If the text entry box already contains text, then when it receives the focus that text will be highlighted. Anything typed while the text is highlighted will replace the old text.

If a **Checkbox** or **Radio Button** has the **Focus**, then pressing the spacebar will check or uncheck the control.

If a **Dropdown List** receives the **Focus** then you have several options:

- Use the mouse to click the down-arrow to reveal the list of selectable options. However, try to avoid using the mouse.
- If you know the first letter of the option you want to select, then just type that letter. The focus will then shift down to the first option in the list beginning with that letter.
- If there are multiple selections beginning with that letter, then keep typing it until your desired option shows up. Then, **Tab** off of the list to save that selection.
- Use the **Up** and **Down Arrows** on your keyboard to scroll through the list of options. When the correct option is highlighted, use the **Tab** key to save that selection and move to the next field.
- Hold down the **Alt** key and press the **Down-Arrow** button on your keyboard to reveal the list. Then, using either your mouse or the **Up** and **Down Arrows**, make your selection and **Tab** off to the next field or hit the **Enter** button.

If a Click Button receives the focus you have two options:

- Use the **Spacebar** to “press” the button, or
- Use the **Enter** key to “press” the button

