

DAVE™

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



Database Application for Vital Events

A LexisNexis® Product

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Maine Marriage Module Municipal Clerk 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.



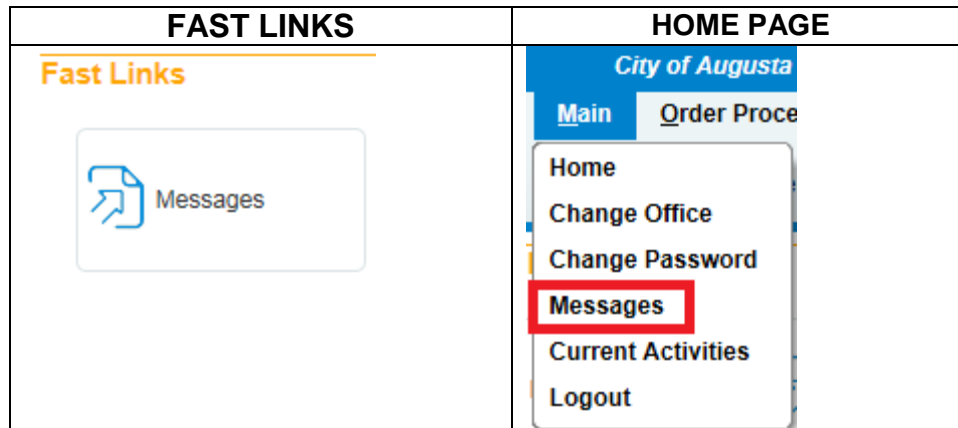
You should now be logged into the DAVE™ application **HOME Page**.



Exercise 1.2 – Messages

Skill Learned: Basic Navigation within the **Messages** Fast Link.

The **Messages** link is one of several links that display upon logging into **DAVE™**. **Messages** can be located either from the **Fast Links** on the **Home** page or from the **Main menu** on the **Home** page as shown below.

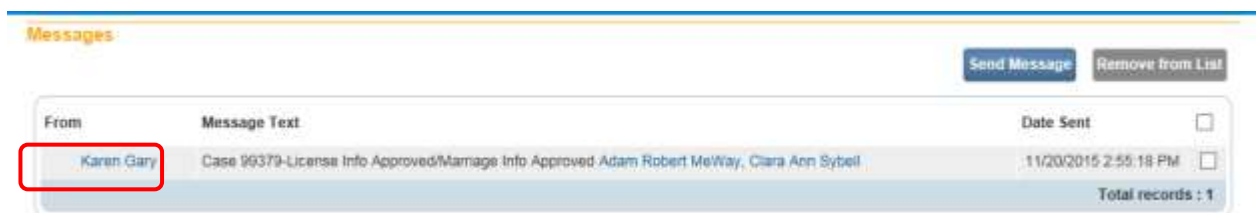


Some **Messages** are text messages sent from one system user to another, while others are automatically system generated during the registration process.

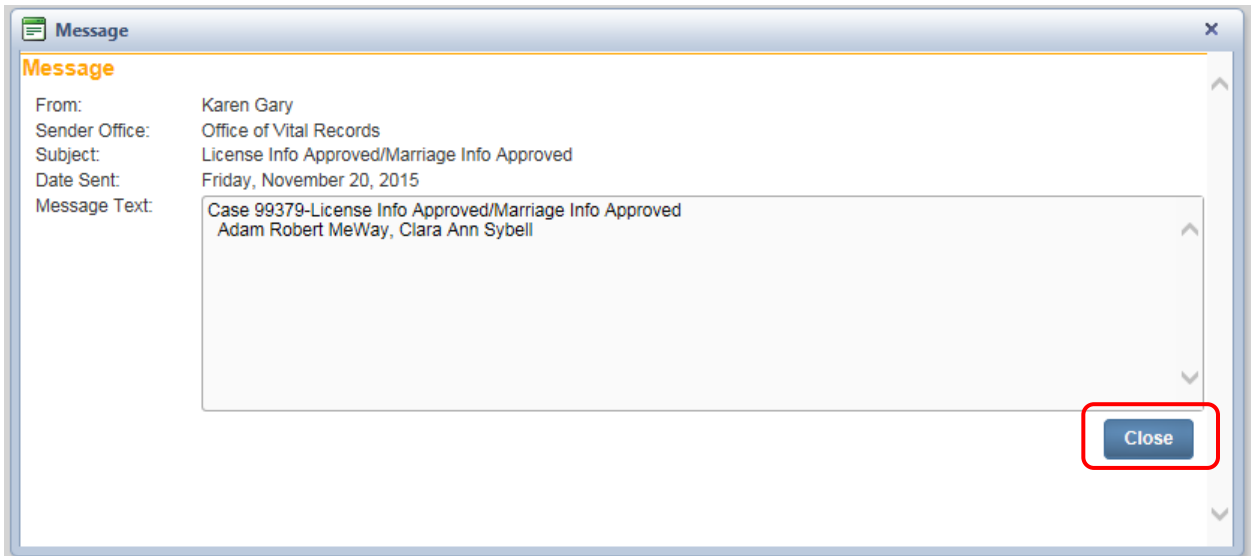
The **Messages** window is a grid that displays all of the messages that have been sent to the user or current office (the office selected at login.) To read a message, click the link in the **From** column. The **Message Text** column displays all or a portion of the message that was sent, depending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

Retrieve Messages

1. Click any of the links in the **From** column of the **Messages** window to read that particular message. You can also click on any of the links contained within the message text to open the message.



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



- Place a checkmark in the checkbox next to the **Date Sent** column header. A checkmark will be placed in all rows.

Messages

Send Message Remove from List

From	Message Text	Date Sent	<input checked="" type="checkbox"/>
Cecile Sprout	Case 308964-License Info Approved/Marriage Info Approved Andy A. Jones, Belinda B. Peters	9/1/2016 2:15:53 PM	<input checked="" type="checkbox"/>
Cecile Sprout	The amendment submitted for: 308956 ; Rickie R. Roe, Tammy T. Toe, Event Date: Aug-23-2016 has been Approved.	8/24/2016 9:18:07 AM	<input checked="" type="checkbox"/>
Cecile Sprout	Case 308958-License Info Approved/Marriage Info Approved Rickie R. Roe, Tammy T. Toe	8/24/2016 7:28:10 AM	<input checked="" type="checkbox"/>
Cecile Sprout	Case 308901-License Info Approved/Marriage Info Approved Christopher C. Malloy, Alicia A. Maples	8/10/2016 10:34:27 AM	<input checked="" type="checkbox"/>

- Clicking the **Remove from List** button with the **Date Sent** checkbox selected will delete all 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.

Messages

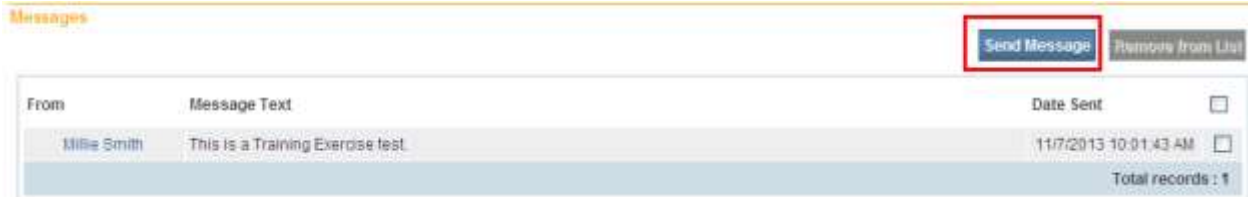
Send Message Remove from List

From	Message Text	Date Sent	<input type="checkbox"/>
Karen Gary	Case 99379-License Info Approved/Marriage Info Approved Adam Robert MeWay, Clara Ann Sybell	11/20/2015 2:55:18 PM	<input checked="" type="checkbox"/>

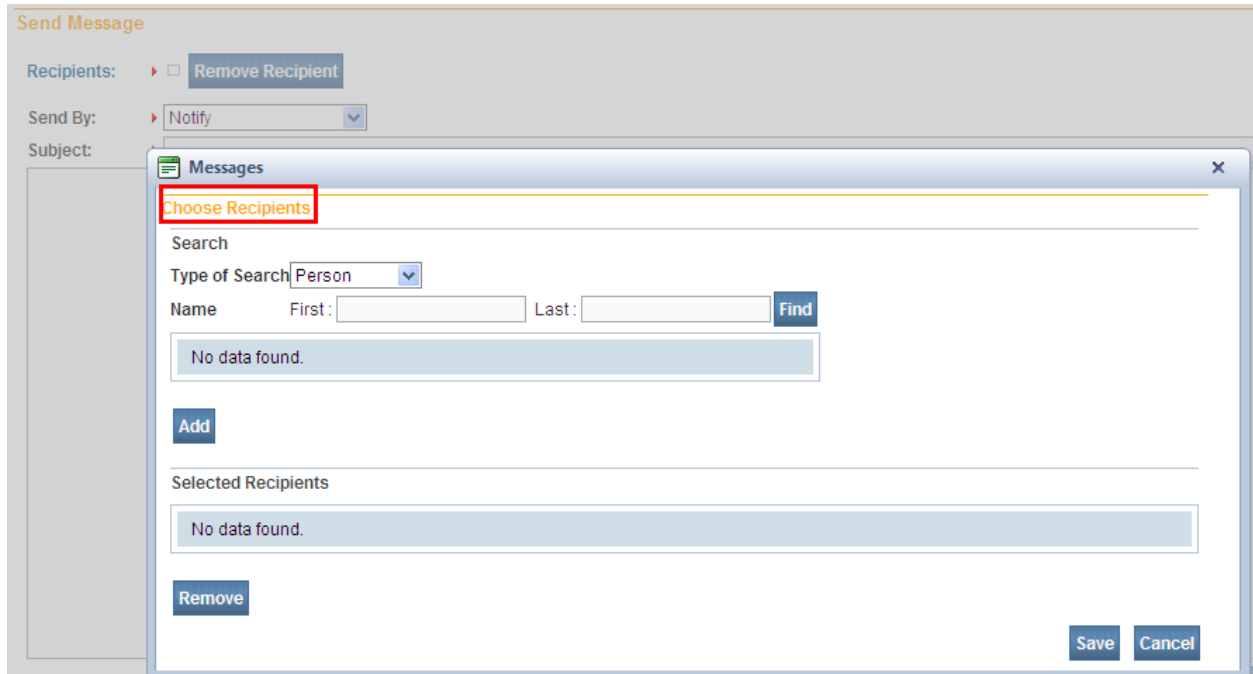
Total records : 1

Create Messages

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



2. 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".



3. Type in the first and last name of the person you wish to send a message to.
4. Select SEARCH.
5. Place a checkmark in the checkbox next to the name of the person you wish to send a message.
6. Click the **Add** button.

Messages

Choose Recipients

Search

Type of Search: Person

Name First: Last: Simms **Find**

	Name	Type
<input checked="" type="checkbox"/>	Simms, Sofia	Local Registrar

Total records : 1

Add

Selected Recipients

	Name	Type
<input type="checkbox"/>	Simms, Sofia	Local Registrar

Total records : 1

Remove

Save **Cancel**

7. Click SAVE. The name will appear near the “**Recipients**” link.

Send Message

Recipients:

Name	Type
<input checked="" type="checkbox"/> Simms, Sofia	Local Registrar

Remove Recipient

Send By: Notify

Subject: Notify

Type your Text here and select Send when finished.

Send **Cancel**

To remove a recipient, place a checkmark in the checkbox next to the name and select “Remove Recipient”.

8. 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.

-
9. 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.

10. Type in a subject.
11. Type the message in the message box.
12. Select the Send button.
13. A popup will appear



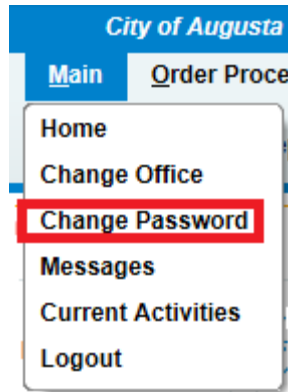
Exercise 1.3 – Change Password

Skill Learned: How to change your **DAVE™** system password. And, how to renew a forgotten password.

Initially, the Application Support Specialist 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.

To change your temporary (or current) password:

1. From the **Home Page**, select **Main -> Change Password**.



2. Enter your old or temporary password into the **Old Password** text entry box as shown below.
3. Enter your new password into the **New Password** text entry box. Passwords must be at least 8 characters in length and should be a combination of letters, numbers, uppercase and lowercase characters. Password cannot exceed 16 characters.
4. Re-enter the new password in the **Confirm Password** text entry box. Note: you must enter the exact same password in the **New Password** and **Confirm Password** text boxes.
5. Select the Security Question from the dropdown.
6. Key in the answer to the Security Question.
7. Click the **Save** button.

A screenshot of the 'Change Password' form. At the top left, it says 'Change Password'. Below that, a timer indicates 'Time left before your password expires: 38 Days, 12 Hours, 35 Minutes'. The form contains five input fields: 'Old Password', 'New Password', 'Confirm Password', 'Security Question' (a dropdown menu), and 'Security Answer' (a text box with masked characters). At the bottom right, there are three buttons: 'Save', 'Later', and 'Clear'.

8. A message that password and security question have been changed successfully will appear. Click the **Continue** button to go to the **Home** page.

A screenshot of a success message. The message text is 'Your password and security question have been changed successfully.' At the bottom right of the message area, there is a blue button labeled 'Continue', which is highlighted with a red rectangular box.

Exercise 1.4 – Forgotten Password

Skill Learned: How to renew a “forgotten” password.

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



The image shows the login screen for the Maine Department of Health and Human Services. At the top, it says "Maine Department of Health and Human Services". Below that, there are two input fields: "Username:" with the text "Trainmecs1" and "Password:". A "Login" button is to the right. Below the password field, it says "Version #: 13.2.3.42662". At the bottom, there is a link that says "Forgot your password?". Red boxes highlight the "Username:" field, the "Forgot your password?" link, and the "Login" button.

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



The image shows the "Request New Password" screen. It has a yellow header with the text "Request New Password". Below the header, it says "To reset your password, enter your Username and the characters in the picture below." There is a "Username:" input field with "Trainmecs1" entered. Below that is a CAPTCHA image showing the code "W28A4". There is an input field for the code with "W28A4" entered. Below the code field, it says "Type the code from the image". At the bottom right, there are three buttons: "Next", "Clear", and "Cancel". The "Next" button is highlighted with a red box.

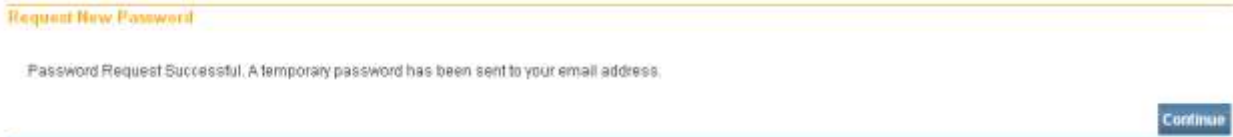
4. Select the Next button.
5. At “Please answer your security question below” screen, enter the answer to the security question you completed earlier.



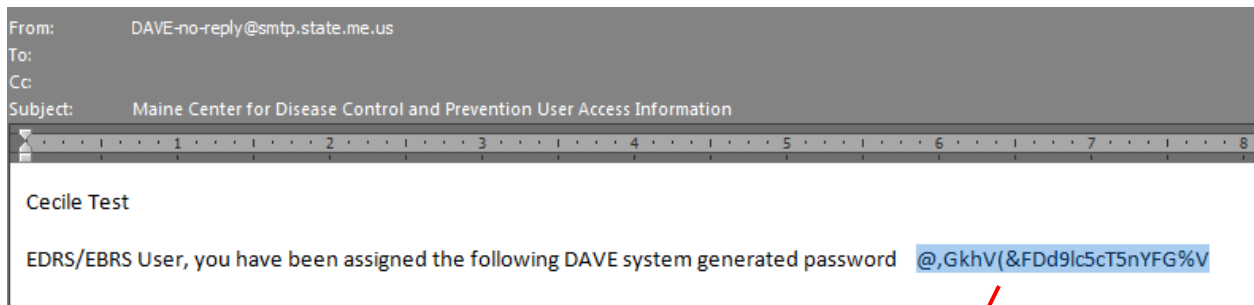
The image shows the "Request New Password" screen. It has a yellow header with the text "Request New Password". Below the header, it says "Please answer your security question below." There is a question: "What is your favorite color?". Below the question is an empty input field. At the bottom right, there are three buttons: "Next", "Clear", and "Cancel".

6. Select the Next button.

7. A message will appear stating a temporary password has been sent to your email address.



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



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

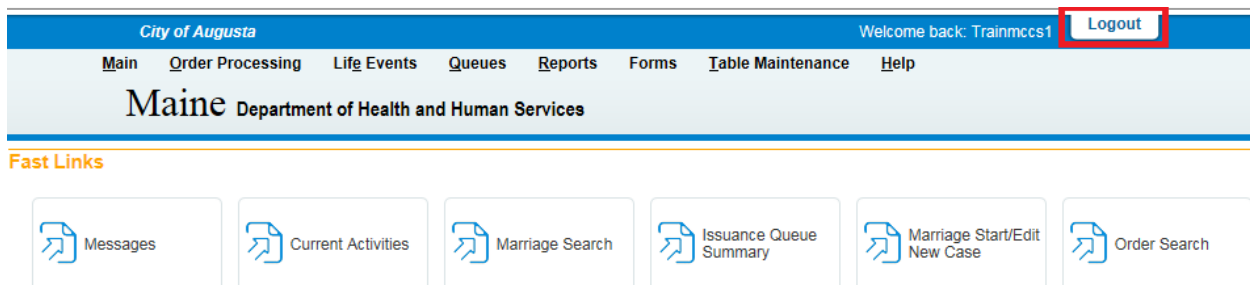


- Select the Login button. The Change Password screen will appear. Copy and paste your temporary password sent to you by email into the 'Old Password' text box and complete the remaining information requested to change your temporary password to a new password of your choice. Click the **Save** button.

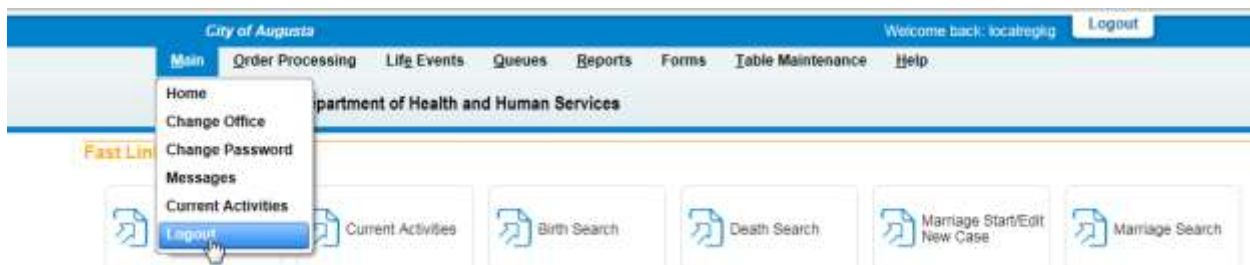
Exercise 1.5 – Logging out of DAVE™

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

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



- Another way to Logoff from **DAVE™** is to select **Logout** from the **Main** menu on the **Home Page**.



- Logout Link will direct user back to the Login page.



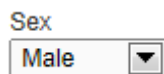
Section 2: Page Controls and Features

Exercise 2.1 – Dropdown Lists

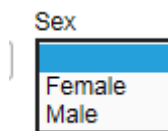
Skill Learned: How to navigate through **DAVE™** using the various fields and icons.

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 **Sex** dropdown list on the **Party A** page. To view all options in the list, click the down-arrow on the right side of the field.



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. It is possible to select an option from the list without actually dropping the list down. If you already know the option you want to select, just tab to the dropdown, and type the first letter of the name of the option. In this example, typing 'F' in the Sex field automatically brings up 'Female'.

Sex :
 Female ▾

Note: If more than one word in the list starts with the same letter, typing that letter again will scroll through the list for you.

- 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 2.2 – Standard Date Format

Skill Learned: How to properly enter dates into the DAVE™ system. While processing registrations, you will frequently be inputting dates. DAVE™ allows you much flexibility in using several different date formats.

- Practice entering dates using the various allowable formats shown below. Note the date format displayed is always the same regardless of the format entered.

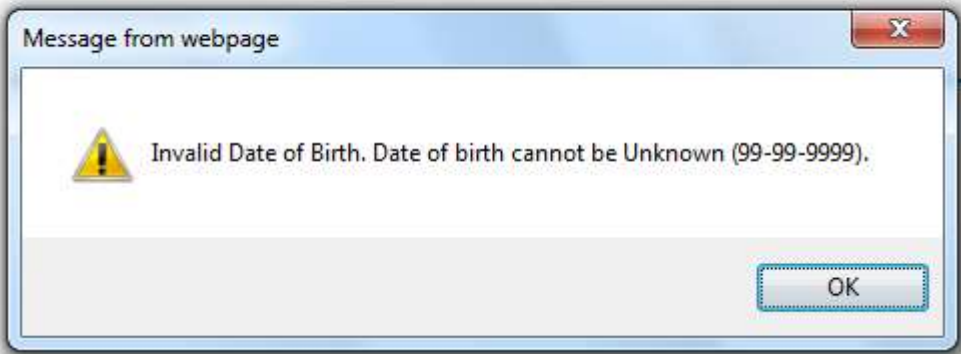
	If user enters:	System will display:
MM-DD-YYYY:	▶ 10-17-2014	▶ Oct-17-2014
MM/DD/YYYY:	▶ 10/17/2014	▶ Oct-17-2014
MMDDYYYY:	▶ 10172014	▶ Oct-17-2014
MONDDYYYY:	▶ OCT172014	▶ Oct-17-2014

- There may be occasions when a date is unknown, such as in the case of legacy records. If a date, or partial date is unknown, key in one of the unknown date formats shown below.

UNKNOWN OR PARTIAL UNKNOWN DATES	
If user enters:	System will display:
99-99-9999	999-99-9999
99-99-1990	1990
Jan-99-1990	Jan 1990

- Date of Birth, however, will not accept unknown date formats.

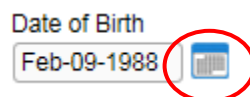
Date of Birth   Age Sex



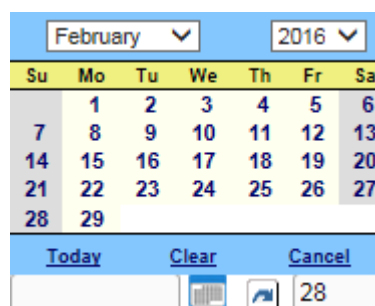
Exercise 2.3 – Using Calendars

Skill Learned: How to use the **Calendar** control to input dates without entering them in manually.

1. In addition to manual date entry, you can also click the **Calendar icon** next to a date entry box to bring up a **Calendar** control.

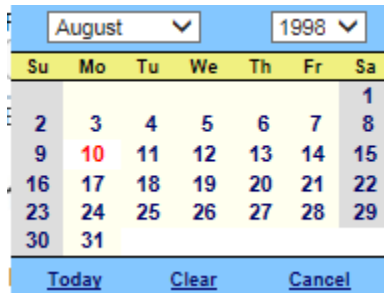


2. Once displayed, there are two drop-down lists within the **Calendar** control; one for selecting the month and the other for selecting the year.



3. By default, the current Month, Day, and Year are displayed. Clicking the down arrow next to the month (in this example February) will open the full list. Or, type the first letter of a month can be typed for quick select or the up and down arrows on the keyboard can be used to scroll to the desired selection.

-
- Selection of any day of any month will populate that date in the corresponding **Date Entry** text box in the MON-DD-YYYY format. For example, using “Aug” and “1998” in the dropdown lists and clicking on 10 for the day will populate the date in Date of Birth field.



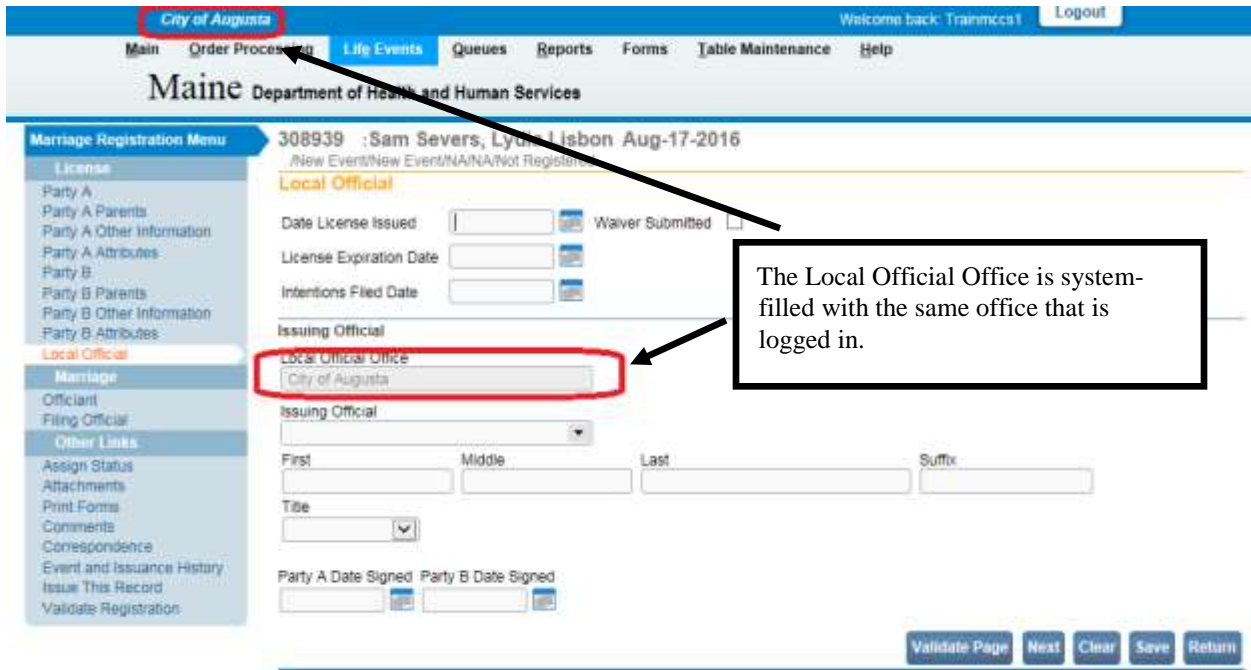
Date of Birth

Date Entry Shortcut: Place the cursor inside a date field and press the F12 button on your computer keyboard. Pressing F12 will automatically populate the date field with the current system date.

Exercise 2.4 – Lookup Controls

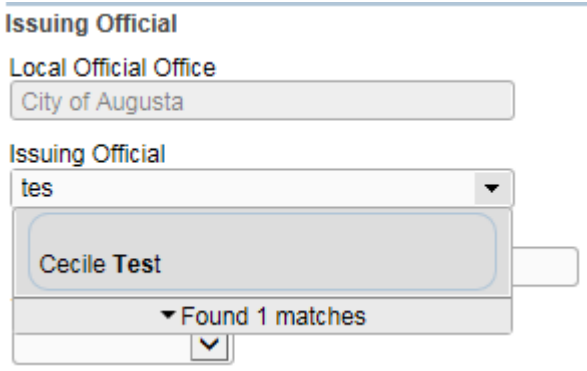
Skill Learned: How to use **Lookup Controls** that launch **Lists of Values** that display a grid of selectable data.

- On the **Local Official** page shown in the example below, the Local Official Office will system-fill with the office that is logged in.



The Local Official Office is system-filled with the same office that is logged in.

2. The Issuing Official dropdown control provides the ability to perform a search.
3. Begin typing the last name of the **Issuing Official**. Enter "Tes". Notice that as you type, the list is filtered to include only individuals that contain the letters "Tes" in the last name.



4. Notice below that once Cecile Test is selected, the name and title information is disabled.

Issuing Official

Local Official Office

City of Augusta

Issuing Official

Test, Cecile

First

Cecile

Middle

Last

Test


Suffix

Title

Municipal Clerk

Exercise 2.5 – Place Lookup

Skill Learned: How to use the **Place Lookup**.

1. Select the  house icon adjacent to the **City or Town** or **State** to access a lookup table with dropdowns for Country, State, County, City, and Zip.

Party A

Preferred Title

Current Name

First

Sam

Middle

Other Middle

Last

Severs

Suffix

Copy Current Name

Name Prior to First Marriage

Place Lookup icon

First

Last

Suffix

Birthplace



Birthplace State

Birthplace Country

United States

Date of Birth

Age

Sex

Validate Page

Next

Clear

Save

Return

2. Make the appropriate selections from the dropdowns, and click the **Select** button. As each selection is made, the dropdown list below is filtered to include only those places valid for the place selected. For example, once Maine is selected, the county list will include only those counties in Maine.

The 'Places' dialog box contains the following fields:

- Country: United States
- State: Maine
- County: Kennebec
- City: Augusta
- Zip: 04330

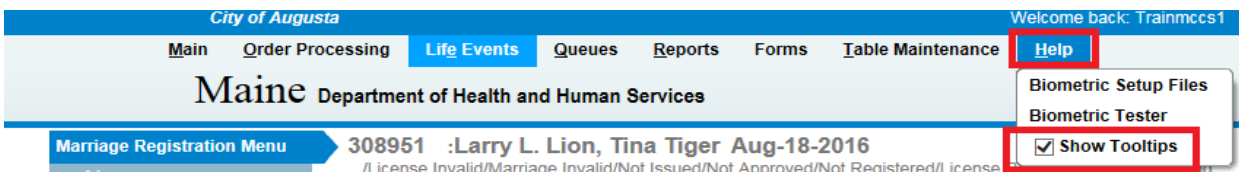
Buttons: Select, Cancel

Exercise 2.6 – Help: Tooltips and Marriage Manual

Skill Learned: How to use **Tooltips**.

When Tooltips is turned on, this permits the user to view what is required in a specific field by hovering over the field.

Tooltips can be turned on or off by the user. To turn **Tooltips** on go to the **Home** page and select the **Help** menu and place a checkmark in the **Show Tooltips** checkbox as shown below. To turn **Tooltips** off, remove the checkmark from the checkbox.



Below is an example of **Tooltips** turned on.

The screenshot shows a marriage registration form for 'Larry L. Lion, Tina Tiger Aug-18-2016'. A tooltip is displayed over the 'Previous Marriage Ended By' field, which is set to 'Divorce'. The tooltip text reads: 'If previous marriage ended by Divorce or Annulment, enter the name of the court and the city/state. If previous marriage ended in Death, enter the city/state of death.'

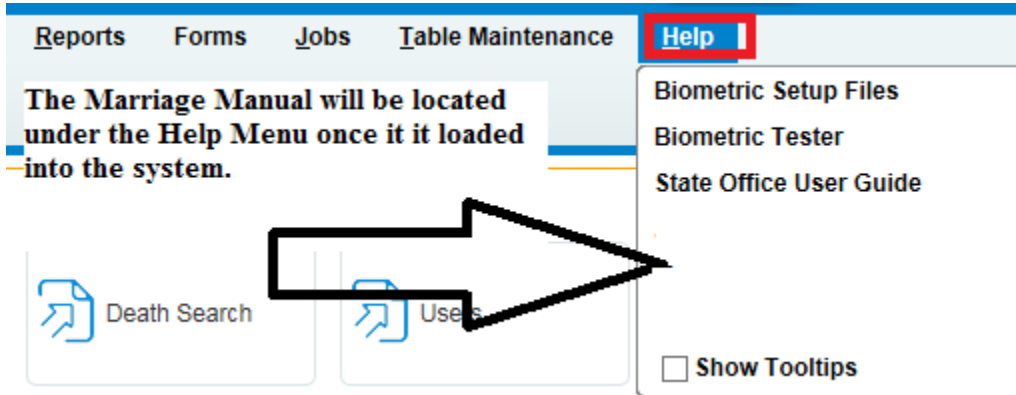
Form fields visible include:

- Party A Attributes: Social Security Number (222-44-5454)
- Number of this marriage: 2
- Previous Marriage Ended By: Divorce (Marriage ended: Jun-01-2001)
- Location: Kennebec Court, Augusta, Maine
- Name of Former Spouse: Linda Sawyer

Buttons at the bottom: Validate Page, Next, Clear, Save, Return

Skill Learned: How to access the **Marriage Manual**.

To access the Marriage Manual on the **Home** page select the **Help** link. The manual will open.



Exercise 2.7 – Predictive Text

Skill Learned: What is **Predictive Text**?

DAVE™ can anticipate the word being entered in the registration pages for the City, State and Country fields when only a few letters are typed.

1. On the Party A page, go to Birthplace State.
2. Key in the first 3 letters of the state.
3. **DAVE™** will automatically bring up all the states that begin with “Mis”. Select the correct state.

Birthplace

Birthplace State

Miss|

Mississippi

Missouri

Date

Section 3: Searching for Cases in DAVE™

Exercise 3.1 – Search by Identifier

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

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



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

The screenshot shows the 'Search for a Marriage Record' form. It is divided into two sections: 'Search by Identifier' and 'Search by Registrant or Data Provider'. The 'Search by Identifier' section includes fields for File Number, Year, Case Id, Date of Marriage (Start and End), File Date, Place of Marriage Location Type, Place of Marriage, Place of Issuance Type, and Place of Issuance. The 'Search by Registrant or Data Provider' section includes fields for Person/Organization (Party A), First, Middle, Last, Sex, SSN, and Date of Birth (Start and End). There is a 'More' button below the 'Search by Registrant or Data Provider' section. At the bottom of the form, there are buttons for Search, Soundex, Swap Names, and Clear.

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

Search for a Marriage Record

Search by Identifier:

Enter one of these items

File Number: Year:
Number:
Case Id:
Date of Marriage: Start:
End:
File Date:
Place of Marriage Location Type:
Place of Marriage:
Place of Issuance Type:
Place of Issuance:
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:
Sex:
SSN:
Date of Birth: Start:
End:

More

- To **Search by Identifier**, enter any of the identifiers shown above. In this example, we are searching based on **Case Id**.
- Click the **Search** button at the bottom of the page to execute the search and display the Search Results page.

Marriage Search Results

Case Id	SFN	Party A Name	Party B Name	Date of Marriage	Place of Marriage	Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		<input type="button" value="Preview"/>

Total records : 1

- In the example above, we used the **Search by Identifier** function to find a record based on its **Case ID**. However, there are other identifiers that can be used to locate records.
- File Number:** a file number is composed of two elements: **Year** and **Number**. **Year** represents the year in which the marriage occurred. **Number** is the unique state file number assigned to the record in question. Searching on either of these without the other will generate an error message.
- File Date:** the date on which registration is accepted for approval. When searching by **File Date**, all records filed on that date will be returned.
- Date of Marriage:** allows you to search through a range of dates. By using both a **Start** and **End** date, the system will return all records with a **Marriage Date** that falls within that range. If only a **Start** date is used, then the system will look for an exact match, only.

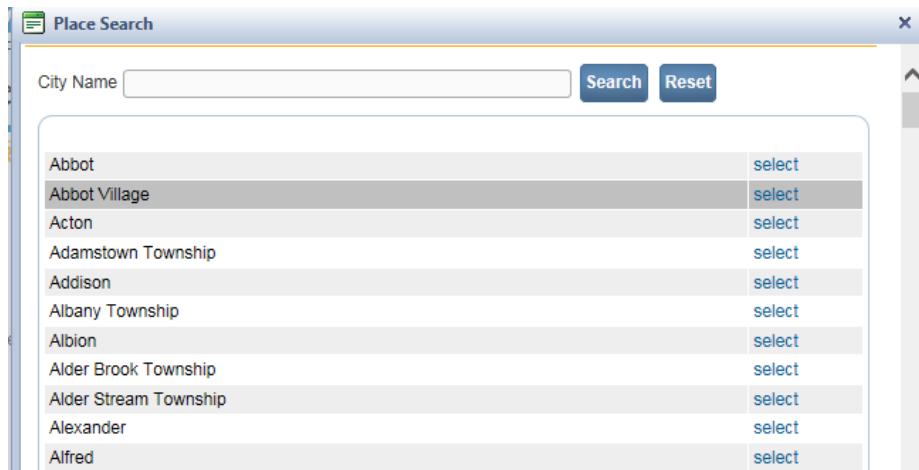
-
- Place of Marriage Location Type:** is used in conjunction with the **Place of Marriage** field. The selection made here will determine the choices available below.
 - Place of Marriage:** The choices available from the **Place of Marriage** field are based on the selection made in the **Place of Marriage Location Type** above.

Place of Marriage:

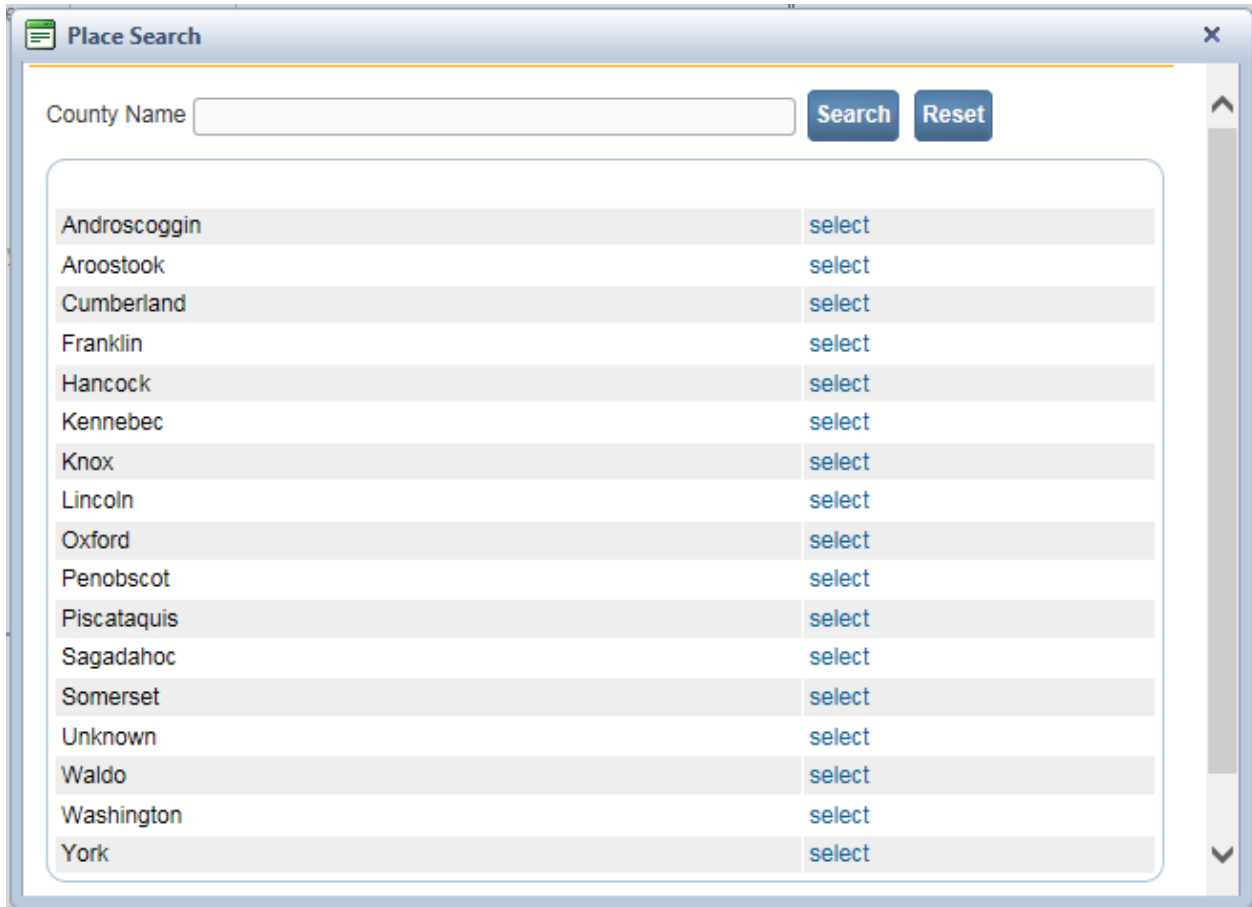


Lookup Button

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



13. If **County** is selected in **Place of Marriage Location Type**, then clicking the **Place of Marriage** lookup button will display a list of counties from which to choose.



The screenshot shows a window titled "Place Search" with a search interface. At the top, there is a text input field labeled "County Name" and two buttons: "Search" and "Reset". Below the input field is a scrollable list of counties, each with a "select" button to its right. The counties listed are: Androscoggin, Aroostook, Cumberland, Franklin, Hancock, Kennebec, Knox, Lincoln, Oxford, Penobscot, Piscataquis, Sagadahoc, Somerset, Unknown, Waldo, Washington, and York.

County Name	Action
Androscoggin	select
Aroostook	select
Cumberland	select
Franklin	select
Hancock	select
Kennebec	select
Knox	select
Lincoln	select
Oxford	select
Penobscot	select
Piscataquis	select
Sagadahoc	select
Somerset	select
Unknown	select
Waldo	select
Washington	select
York	select

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

Exercise 3.2 – 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 registrant or data 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 **Party A**

City of Augusta
Welcome back: Trainmcs | Logout

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

Maine Department of Health and Human Services

Search for a Marriage Record

Search by Identifier:
Enter one of these items

File Number: Year: []
Number: []

Case Id: []

Date of Marriage: Start: [] End: []

File Date: []

Place of Marriage Location Type: []

Place of Marriage: []

Place of Issuance Type: []

Place of Issuance: []

Maximum records to display: [200]

OR

Search by Registrant or Data Provider:

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

First Search Person/Organization

Person/Organization: Party A

First: Barbara

Middle: []

Last: Greene

Sex: []

SSN: []

Date of Birth: Start: [] End: []

More

Search Soundex Swap Names Clear

2. Enter Party A's **First** and **Last** name in their corresponding fields.
3. Click the **Search** button to execute the search and retrieve matching records.
4. All cases where either Party A or Party B first and last name is "Barbara Greene" will display in the search **Results** list.

Marriage Search Results

Case Id	SFN	Party A Name	Party B Name	Date of Marriage	Place of Marriage	
99379		Brady, Patrick	Greene, Barbara	Jan-03-2015	Augusta	Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		Preview

Total records : 2

New Search

Note: In the marriage module, searches are performed against both Party A and Party B. As shown above, 2 cases were returned, one where Party A's name was Barbara Greene and the other where Party B's name was Barbara Greene.

5. However, what if you do not know Party A's first name? What if you know only the **Last** name, but you also know the last name of Party B? In this case, you can search using Party A and Party B's last name. From the **Person/Organization** dropdown list, select **Party A** and then type Party A's **Last** name, "Greene".

-
6. Locate and click the **More** button. A **Second Search Person/Organization** tab will appear.
 7. In the **Second Search Person/Organization** section, select **Party B** from the **Person/Organization** dropdown list, enter the Party B's **Last** name "Brady".
 8. Click the **Search** button. The result of this search will be any case where the last name of Party A or Party B is "Greene" and the last name of Party A or Party B is "Brady".

Search by Registrant or Data Provider:

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

First Search Person/Organization

Person/Organization:	<input type="text" value="Party A"/>
First:	<input type="text"/>
Middle:	<input type="text"/>
Last:	<input type="text" value="Greene"/>
Sex	<input type="text" value=""/>
SSN:	<input type="text" value=""/>
Date of Birth:	Start: <input type="text"/>
	End: <input type="text"/>

Second Search Person/Organization

Person/Organization:	<input type="text" value="Party B"/>
First:	<input type="text"/>
Middle:	<input type="text"/>
Last:	<input type="text" value="Brady"/>
Sex	<input type="text" value=""/>
SSN:	<input type="text" value=""/>
Date of Birth:	Start: <input type="text"/>
	End: <input type="text"/>

More

Search Soundex Swap Names Clear

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.

- 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 records were returned.

Marriage Search Results

Case Id	SFN	Party A Name L	Party B Name	Date of Marriage	Place of Marriage	
99379		Brady, Patrick	Greene, Barbara	Jan-03-2015	Augusta	Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		Preview
						Total records : 2

[New Search](#)

Exercise 3.3 – 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.

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:

Sex:

SSN:

Date of Birth: Start: End:

- Using the **Search by Registrant or Data Provider** section Enter “Barbara” for the first name and a “G” followed by a “%” sign for the last name. In this example, we were not sure of the spelling of Party A’s last name, but we did know that the last name begins with the letter “G”.
- In this case, the percent sign (%) sign tells **DAVE™** that we want to view all records where Party A’s last name starts with “G”, and first name is ‘Barbara’.
- 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. This is especially important for marriage searches, as the results will include matches on both Party A and Party B names as shown below.

Marriage Search Results

Case Id	SFN	Party A Name ↓	Party B Name	Date of Marriage	Place of Marriage	
99379		Brady, Patrick	Greene, Barbara	Jan-03-2015	Augusta	Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		Preview

Total records : 2

[New Search](#)

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

Exercise 3.4 – 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.

Search for a Marriage Record

Search by Identifier:
Enter one of these items:

File Number: Year:

Case Id: Number:

Date of Marriage: Start:

File Date: End:

Place of Marriage Location Type:

Place of Marriage:

Place of Issuance Type:

Place of Issuance:

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:

Sex:

SSN:

Date of Birth: Start:

End:

[More](#)

- From the **Search for a Marriage Record** page enter “Barbera” for the first name and “Green” for the last name under **Search by Registrant or Data Provider**.

In this example, the name we are looking for is “Barbara Greene”. However, using **Soundex** we should be able find the case using a sound-alike name of “Barbera Green”.

- Next, click the **Soundex** button, instead of the **Search** button.
- Notice that, even though we used an incorrect spelling, **Soundex** was able to find the registration we were looking for.

Marriage Search Results

Case Id	SFN	Party A Name ↓	Party B Name	Date of Marriage	Place of Marriage	
99379		Brady, Patrick	Greene, Barbara	Jan-03-2015	Augusta	Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		Preview

Total records : 2

[New Search](#)

- Additionally, **Soundex** can also be used to search for any combination of Persons and/or Organizations even when both names have been misspelled.
- Select New Search to perform a new Search.
- In this example, enter “Barbarah” for Party A first name and “Green” for the last name. Then select the more button and select Party B. Enter “Patric” for the first name and “Bradi” for the last. Now select the **Soundex** 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:

Sex:

SSN:

Date of Birth: Start:

End:

Second Search Person/Organization

Person/Organization:

First:

Middle:

Last:

Sex:

SSN:

Date of Birth: Start:

End:

[More](#)

- As shown below, we were able to find the correct case even though both names were misspelled.

Marriage Search Results

Case Id	SFN	Party A Name L	Party B Name	Date of Marriage	Place of Marriage	
99379		Brady, Patrick	Greene, Barbara	Jan-03-2015	Augusta	Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		Preview

Total records : 2

New Search

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

Exercise 3.5 – 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 some cases it may be difficult to determine if the names provided are the values for first or last name. For example, when a person's last name is typically a first name (e.g. David Gary or Gary David). When this is the case, a standard search can sometimes fail to retrieve a record.

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:

Sex:

SSN:

Date of Birth: Start: End:

More

1. Enter "Gary" as the **First** name and "David" as the **Last** name.
2. Select the **Swap Names** button.

- As shown below, cases where the first name is Gary and the last is David as well as cases where the first name is David and last name is Gary are returned.

Marriage Search Results

Case Id	SFN	Party A Name ↓	Party B Name	Date of Marriage	Place of Marriage	
99384		David, Gary	Meadows, Katherine	Jan-01-2015	Augusta	Preview
99383		Gary, David	Grady, Karen	Nov-14-2015		Preview
						Total records : 2

[New Search](#)

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

Exercise 3.6 – Search Results

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

- In this example, we are conducting a Wild Card (%) search for all records with Party A whose Last name begins with the letters “Br”.

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:

Sex: ▼

SSN:

Date of Birth: Start:  End: 

[More](#)

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

- This search returned the 5 records shown below.

Marriage Search Results

Case Id	SFN	Party A Name	Party B Name	Date of Marriage	Place of Marriage	
99379		Brady, Patrick	Greene, Barbara	Jan-03-2015	Augusta	Preview
99387		Diner, Franklin	Brown, Hannah	Mar-03-2015		Preview
99386		<u>Doin, Howe</u>	Bradley, Maya	Feb-02-2015		Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		Preview
99385		Leaf, Basil	Break, Anita	Jan-01-2015		Preview

Total records : 5

[New Search](#)

- Notice that when you hover over the column headers in the results page they are [underlined links](#). These links allow you to change the sort order of the **Results** page. This can be very helpful in locating a specific record. In the example below, we have changed the sort order by clicking the **Date of Marriage** column header.

Marriage Search Results

Case Id	SFN	Party A Name	Party B Name	<u>Date of Marriage</u>	Place of Marriage	
308557	2016000002	Mongo, Mark Measles	Jungle, Judy J.	Jun-22-2016	Portland, Cumberland	Preview
308572		Mongo, Mark Measles	Jungle, Judy J.	Jun-22-2016		Preview
308568		Junior, John	Malone, Mary	Jun-23-2016	Augusta, Kennebec	Preview
308618		Benji, Ben B.	Crista, Cindy C.	Jun-27-2016		Preview

Exercise 3.7 – Preview Case

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

- 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.

Marriage Search Results

Case Id	SFN	Party A Name	Party B Name	<u>Date of Marriage</u>	Place of Marriage	
99385		Leaf, Basil	Break, Anita	Jan-01-2015		Select
99379		Brady, Patrick	Greene, Barbara	Jan-03-2015	Augusta	Preview
99386		Doin, Howe	Bradley, Maya	Feb-02-2015		Preview
99387		Diner, Franklin	Brown, Hannah	Mar-03-2015		Preview
99360		Greene, Barbara	Brady, Patrick	Dec-01-2015		Preview

Total records : 5

Preview link

[New Search](#)

Preview

Case Id: 99385
 File Number:
 Party A Name: Basil Leaf
 Party B Name: Anita Break
 Place of Marriage:
 Date Entered: NOV-18-2015
 Status: /New Event/New Event/NA/NA/Not Registered

Date Filed:
 Party A Birthplace: United States
 Party B Birthplace: United States
 Date of Marriage: Jan-01-2015
 Last Updated By: Local Registrar

Party A Date of Birth:
 Party B Date of Birth:

- Once you have previewed the registration and are sure that you have located the correct record, click the Party A Name, Party B Name, or the Select link to open the actual record.

- You should now see the **Party A** page. Also, on the left side of the Party A Page is the **Marriage Registration Menu**.

Marriage Registration Menu 308939 : Sam Severs, Lydia Lisbon Aug-17-2016
/New Event/New Event/NANA/Not Registered

Party A

Preferred Title

Current Name

First	Middle	Other Middle	Last	Suffix
Sam			Severs	

Copy Current Name

Name Prior to First Marriage

First	Middle	Other Middle	Last	Suffix

Birthplace

Birthplace State	Birthplace Country
	United States

Date of Birth

	Age	Sex

Validate Page Next Clear Save Return

Section 4: Record Validation

Exercise 4.1 – Status Bar

Skill Learned: How to use the **Status Bar** to help you track missing data that can prevent a marriage record from being properly registered. It is also a valuable tool for tracking the status of a marriage case.

DAVE™ provides work flow and data quality management through the assignment of statuses. The marriage registration process consists of several sub-processes that are often completed by different users. In order to track these steps **DAVE™** assigns one or more statuses to the record when an action is performed (e.g., the **Validate Page** button is clicked) or an event occurs (e.g., a validation rule fails).

The initial status assigned to a new electronic marriage record is **/New Event/New Event/NANA/Not Registered /**. The goal of all parties in the registration process is to obtain a ‘perfect’ status. A perfect status indicates the highest data quality and completion of all steps in the registration process (e.g. **License Valid/ Marriage Valid/Issued/Approved/Registered**). Sometimes a marriage record may contain values which are valid; however, those values cause soft edit rule failures. Therefore, it is also possible to have a registered record with a **License Valid with exceptions / Marriage Valid with exceptions /Issue/Approved/ Registered** status or any combination of valid and valid with exceptions.

- The **Status Bar** is viewable from any of the **Marriage Registration Menu** data entry pages.

99385 :Basil Leaf, Anita Break Jan-01-2015
/New Event/New Event/NA/NA/Not Registered
Party A

STATUS BAR

Preferred Title

Current Name

First Middle Other Middle Last Suffix
Basil Leaf

Name Prior to First Marriage

First Middle Other Middle Last Suffix

Birthplace

Birthplace State Birthplace Country
United States

Date of Birth Age Sex

Validate Page Next Clear Save Return

Example of statuses as the case progresses.

308620 :Jeffrey J. James, Sherry S. Shawn Jun-27-2016
/License Valid/Marriage Invalid/Ready To Issue/Not Approved/Not Registered/Marriage Pending

Example of the statuses on a case that is registered.

308617 2016000004 :Henry H. Heinz, Heather H. Gray Jun-27-2016
/License Valid/Marriage Valid/Issued/Approved Registered

Exercise 4.2 – Record Validation and Error Correction

Skill Learned: How to validate marriage records and prepare them for registration.

1. Click the **Validate Page** button to validate the registration data entered into the system.
2. When you click the **Validate Page** button, the **Validation Results** frame will list all of the errors associated with that page. Notice that a horizontal line separates the **Validation Results** window from the data entry page.

Party A

Preferred Title

Clicking the **Validate Page** button reveals two types of errors: "Hard" edit rule failures (highlighted in red) and "Soft" edit rule failures (highlighted in yellow.)

Current Name

First Middle Other Middle Last Suffix
Sam Severs

[Copy Current Name](#)

Name Prior to First Marriage

First Middle Other Middle Last Suffix

Birthplace

Birthplace State Birthplace Country
 United States

Date of Birth Age Sex

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

Validation Results

[List All Errors](#) [Save Overrides](#) [Hide](#)

Error Message

Override Goto Field Popup

MG0005: Party A Current Middle Name cannot be left blank Enter a valid Party A Current Middle Name	<input type="checkbox"/>	fix	fix
MG0020: Party A First Name Prior to First Marriage cannot be left blank Enter a valid Party A First Name Prior to First Marriage.		fix	fix

3. Initially, the **Validation Results** frame will only display those errors associated with the current registration page. All of the errors in the example below are related to the **Party A** page. However, if you then click the **List All Errors** button...

Validation Results

[List All Errors](#) [Save Overrides](#) [Hide](#)

Error Message

Override Goto Field Popup

MG0005: Party A Current Middle Name cannot be left blank Enter a valid Party A Current Middle Name	<input type="checkbox"/>	fix	fix
MG0020: Party A First Name Prior to First Marriage cannot be left blank Enter a valid Party A First Name Prior to First Marriage.		fix	fix
MG0024: Party A Middle Name Prior to First Marriage cannot be left blank. Enter a valid Party A Middle Name Prior to First Marriage.	<input type="checkbox"/>	fix	fix
MG0032: Party A Last Name Prior to First Marriage cannot be left blank Enter a valid Party A Last Name Prior to First Marriage.		fix	fix
MG0038: Party A was born in United States, but birth State was not entered Enter Party A birth State		fix	fix
MG0043: Party A's Date of Birth cannot be left blank. The Party A's date of birth cannot be left blank.		fix	fix
MG0046: Gender of Party A cannot be blank Enter a valid value for Gender of Party A		fix	fix

...the **Validation Result** frame will refresh and display all of the errors associated with the current registration.

4. Notice also that the **List All Errors** button has now become the **List Page Errors** button as shown below. Clicking this button again will remove any errors not associated with the current registration page.
5. Click the **Hide** button to close the **Validation Results** frame. Re-validate any registration page to view the **Validation Results** frame again.

Validation Results	List Page Errors	Save Overrides	Hide
Error Message	Override	Goto Field	Popup
MG0005: Party A Current Middle Name cannot be left blank Enter a valid Party A Current Middle Name	<input type="checkbox"/>	fix	fix
MG0020: Party A First Name Prior to First Marriage cannot be left blank Enter a valid Party A First Name Prior to First Marriage.		fix	fix
MG0024: Party A Middle Name Prior to First Marriage cannot be left blank. Enter a valid Party A Middle Name Prior to First Marriage.	<input type="checkbox"/>	fix	fix
MG0032: Party A Last Name Prior to First Marriage cannot be left blank Enter a valid Party A Last Name Prior to First Marriage.		fix	fix
MG0038: Party A was born in United States, but birth State was not entered Enter Party A birth State		fix	fix
MG0043: Party A's Date of Birth cannot be left blank. The Party A's date of birth cannot be left blank.		fix	fix
MG0046: Gender of Party A cannot be blank Enter a valid value for Gender of Party A		fix	fix
MG0053: Party A Father First Name cannot be left blank Enter a valid Party A Father First Name	<input type="checkbox"/>	fix	fix
MG0057: Party A Father Middle Name cannot be left blank Enter a valid Party A Father Middle Name	<input type="checkbox"/>	fix	fix

Error Correction Using the Goto Field Button

6. To correct an error, click the [fix](#) button in the **Goto Field** column of the **Validation Results** page. This will place the cursor or “focus” in the field that needs to be corrected. Use this option if you are on a single registration page with many errors to correct.

Party A

Preferred Title

Current Name

First Middle Other Middle Last Suffix
Sam Severs

Copy Current Name

Name Prior to First Marriage

First Middle Suffix

Birthplace

Birthplace State Birthplace Country
 United States

Date of Birth Age Sex

Validate Page Next Clear Save Return

Validation Results

List Page Errors Save Overrides Hide

Error Message

Override Goto Field Popup

MG0005: Party A Current Middle Name cannot be left blank
Enter a valid Party A Current Middle Name

MG0020: Party A First Name Prior to First Marriage cannot be left blank
Enter a valid Party A First Name Prior to First Marriage.

Clicking the "Fix" button in the Goto Field column sent the focus to this control.

Note: "Focus" determines which onscreen element is the target of action. If a text box "has the focus", then anything typed on the keyboard appears in the text box. If a dropdown list "has the focus", the down-arrow will open the list and the up-arrow will close the list.

Error Correction Using the Popup Icon

7. Another method of correcting errors is to click the icon in the **Popup** column...

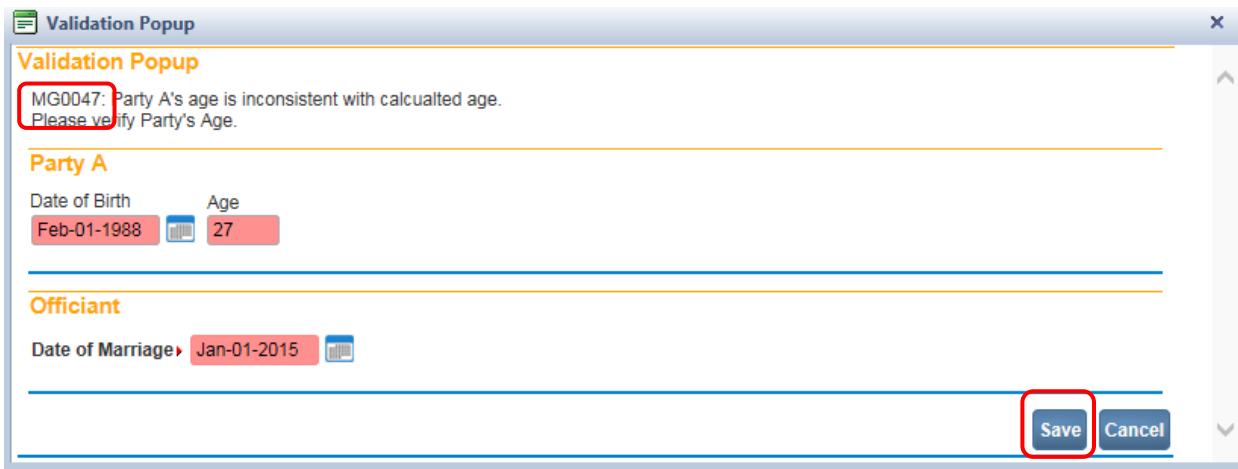
Validation Results

Error Message

MG0005: Party A Current Middle Name cannot be left blank
Enter a valid Party A Current Middle Name

...to launch a popup window containing the error or errors to be corrected. This functionality is useful when an error is caused by conflicting entries across multiple registration pages. Rather than searching across many pages trying to determine which field contains the error, **Popup** presents all of the conflicting fields in one window.

In the example above, a conflict between two separate fields generated error number **MG0047**. Correcting either of the entries below may correct the issue; however, more than one correction may be needed in some cases.



8. Correct the error and click the **Save** button to submit your changes. The popup will close and your changes will appear on the registration page. Click the **Cancel** button to close the popup without making any changes.

Overridable Errors (soft edits) and Non-Overridable Errors (hard edits)

There are two types of errors in **DAVE™**: **Hard edits** and **Soft edits**. Hard edit rule failures are highlighted on screen in red. Soft edit rule failures are highlighted on screen in yellow.

Party A

Preferred Title
Groom

Current Name

First Middle Other
Sam

Copy Current Name

Name Prior to First Marriage

First Middle Other Middle Last Suffix
Sam

Birthplace

Birthplace State Birthplace Country
Maine United States

Date of Birth Age Sex
Jun-02-1988 27 Male

Validate Page Next Clear Save Return

Validation Results

List Page Errors Save Overrides Hide

Error Message

Override Goto Field Popup


MG0005: Party A Current Middle Name cannot be left blank Enter a valid Party A Current Middle Name	<input type="checkbox"/>	fix	fix
MG0024: Party A Middle Name Prior to First Marriage cannot be left blank. Enter a valid Party A Middle Name Prior to First Marriage.	<input type="checkbox"/>	fix	fix
MG0047: Party A's age is inconsistent with Date of Marriage calculated age. Please verify Party's Age.		fix	fix


Hard edits do not contain a checkbox as these errors can only be approved by the Vital Records office.


Notice that the **Date of Birth** and **Age** field shown above is highlighted in red. Registration will not be permitted until this error (and others highlighted in red) have been corrected. Also note that there is no checkbox in the Override column for error MG0047 which indicates this is a "hard edit". The municipal office cannot override hard edit rules. Only the Vital Records office can override hard edit rules.

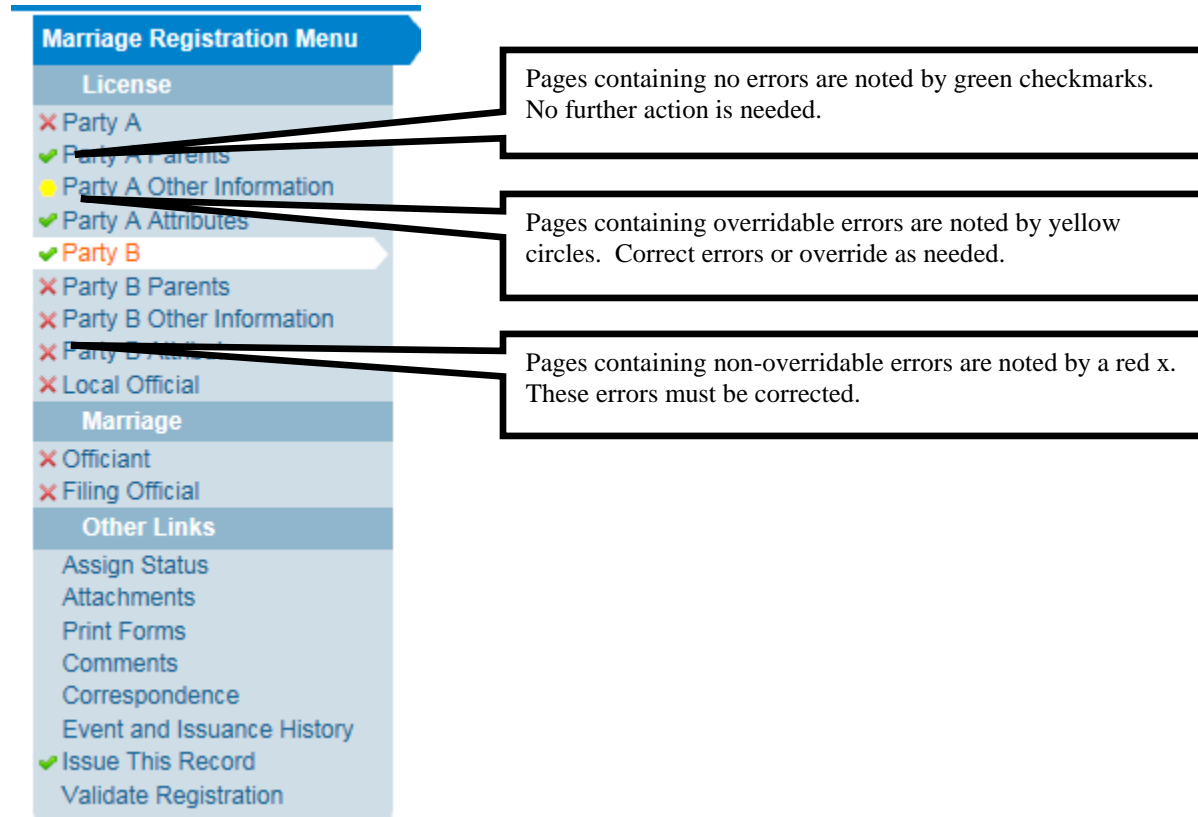
Notice that the **Middle Names** shown above are highlighted in yellow which indicates this is a soft edit. Using the **Override** feature described below, this entry (and others highlighted in yellow) can be accepted as submitted and registration permitted.

Additionally, notice that certain pages on the various registration menus are marked with a **red x**, **yellow circle**, or a **green checkmark**. These serve as indicators as to which pages contain errors and which pages contain no errors.

For example, pages marked with a green checkmark  contain no errors.

Pages marked with a red  contain hard edit rule failures that must be corrected before registration can be completed.

Pages marked with a yellow circle  contain soft edit rule failures that may be overridden or that have already been overridden.



The screenshot shows a 'Marriage Registration Menu' with several sections: License, Party A, Party B, Local Official, Marriage, and Other Links. Each item is preceded by a status icon: a red X for non-overridable errors, a green checkmark for no errors, and a yellow circle for overridable errors. Three callout boxes provide the following explanations:

- Pages containing no errors are noted by green checkmarks. No further action is needed.
- Pages containing overridable errors are noted by yellow circles. Correct errors or override as needed.
- Pages containing non-overridable errors are noted by a red x. These errors must be corrected.

In certain instances, a record may still be registered, even if it contains “soft edit” type of errors. For “soft edit” errors, a checkbox will be provided in the **Override** column as shown below.

Error Message	Override	Goto Field	Popup
MG0005: Party A Current Middle Name cannot be left blank Enter a valid Party A Current Middle Name	<input checked="" type="checkbox"/>	<input type="button" value="fix"/>	<input type="button" value="fix"/>
MG0020: Party A First Name Prior to First Marriage cannot be left blank Enter a valid Party A First Name Prior to First Marriage.	<input type="checkbox"/>	<input type="button" value="fix"/>	<input type="button" value="fix"/>
MG0024: Party A Middle Name Prior to First Marriage cannot be left blank. Enter a valid Party A Middle Name Prior to First Marriage.	<input checked="" type="checkbox"/>	<input type="button" value="fix"/>	<input type="button" value="fix"/>

Place a checkmark () in the **Override** box next to the “soft edit” error to be overridden and click the **Save Overrides** button. This allows you to process a marriage record even if some errors are present.

Note: Before placing a checkmark in the Override box, check if the error can be fixed. However, if a checkmark is placed in the override box, and if prior to registration the error can be fixed, then uncheck the checkbox in the Override column, and click the Save Overrides button. This will clear out the error message.

Note: Anytime the Validate Page button is clicked the system will evaluate all pages and mark them accordingly with red, yellow, or green indicators.

Party B

Preferred Title

Bride

Current Name


First Middle Other Middle Last Suffix
Lydia L. Lisbon

Name Prior to First Marriage

First Middle Other Middle Last Suffix
Lydia L. Lisbon

Birthplace

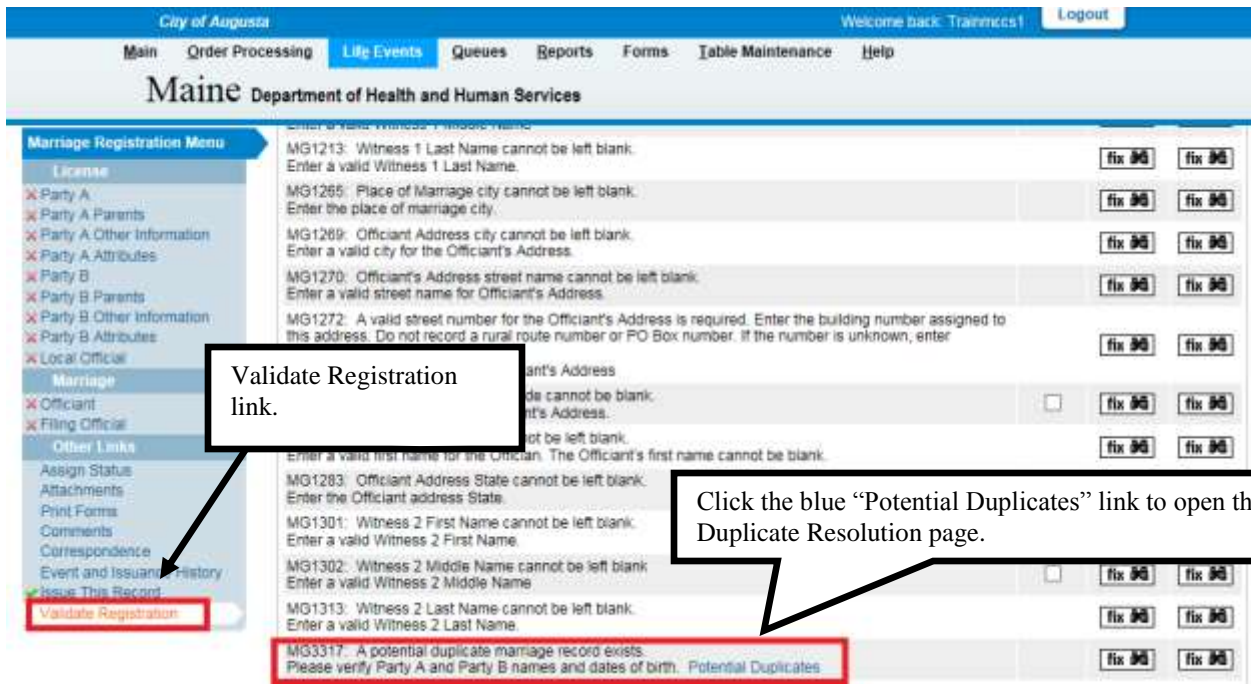
Birthplace State Birthplace Country
 Maine United States

Date of Birth Age Sex
Jun-10-1989   27 Female

Exercise 4.3 – Duplicate Record Resolution

Skill Learned: How to use the [Potential Duplicates](#) link to resolve duplicate records.

1. When the **Validation Registration** link is activated from the **Marriage Registration Menu** pages, the **DAVE™** system runs a search for potential duplicate records if certain data elements on more than one record exists. This is done to prevent the creation of duplicate marriage registrations.



Note: Edit rule MG3317 (Potential Duplicate) will be triggered if the record being created has data elements that matches another existing record in DAVE™. That is, if both Party A's and Party B's first, last name, and date of birth matches a record already in DAVE™.

The rule is only fired when selecting "Validate Registration". It will not fire when selecting "Validate Page".

2. If **DAVE™** finds potential duplicates an error message (as shown above) will appear in the **Validation Results list** containing the following message and link:
"MG3317: A potential duplicate marriage record exists. Please verify Party A and Party B names and dates of birth. [Potential Duplicates](#)"
3. Click the [Potential Duplicates](#) link to open the **Duplicate Resolution** page. This page lists all of the records in the **DAVE™** database that have been identified as potential duplicates.

MG3317: A potential duplicate marriage record exists. Please verify Party A and Party B names and dates of birth. [Potential Duplicates](#)

Duplicate Resolution

Case Id	Party A Name	Party B Name	Date of Marriage	Place of Marriage	Select
308950	Drummin, Donald	Piper, Lisa	Aug-18-2016		Select
308949	Drummin, Donald	Piper, Lisa	Aug-18-2016		

Total records : 2

Note: If the Select link is disabled, clicking on the Party A or Party B link of the potential duplicate case, owned by another local office, will bring up a popup, as shown below “*The case you have selected is owned by another Local Office*”. Select the “Cancel” button. Do not accept ownership.

City of Augusta Welcome back: Trainmccs1 Logout

Main Order Processing Life Events Queues Reports Forms Table Maintenance Help

Maine Department of Health and Human Services

Duplicate Resolution

Case Id	Party A Name	Party B Name
308944	Renee, Robert	Dodge, Debbie
308943	Renee, Robert	Dodge, Debbie

Current Case

Case Id: 308944
File Number:
Party A Name: Robert Renee
Party B Name: Debbie Dodge
Place of Marriage:
Date Entered: Aug-18-2016
Status: /License Invalid/Marriage Invalid/No

Date Filed:
Party A Birthplace:
Party A Date of Birth: Jun-06-1999
Party B Date of Birth: Dec-08-1999

Message from webpage

The case you have selected is owned by another Local Office. Press OK to take ownership of this Case.

OK Cancel

Return to Rule Failures

Select the “Cancel” button. Ownership of case should instead take place at the Start/Edit New Case – Results page.

- When you have finished looking over the opened record, click the **Return** button at the bottom of the page to return to the **Duplicate Resolution** window.

Party A

Preferred Title

Current Name

First: Middle: Other Middle: Last: Suffix:

[Copy Current Name](#)

Name Prior to First Marriage

First: Middle: Other Middle:

Birthplace

Birthplace State: Birthplace Country:

Date of Birth: Age: Sex:

Clicking the Return button will return you to the Duplicate Resolution page.

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

Duplicate Resolution

Case Id	Party A Name	Party B Name	Date of Marriage	Place of Marriage	
308950	Drummin, Donald	Piper, Lisa	Aug-18-2016		<input type="checkbox"/>
308949	Drummin, Donald	Piper, Lisa	Aug-18-2016		<input type="checkbox"/>

Total records : 2

Current Case

Case Id: 308949
File Number: _____ Date Filed: _____
Party A Name: Donald Drummin Party A Birthplace: _____ Party A Date of Birth: Jun-01-1999
Party B Name: Lisa Piper Party B Birthplace: _____ Party B Date of Birth: Jun-01-1999
Place of Marriage: _____ Date of Marriage: Aug-18-2016
Date Entered: Aug-18-2016 Last Updated By: Cecile Test
Status: /License Invalid/Marriage Invalid/Not Issued/Not Approved/Not Registered/License Pending/Marriage Pending/Marriage Potential Duplicate

Potential Duplicate Case

Case Id: **308950**
File Number: _____ Date Filed: _____
Party A Name: Donald Drummin Party A Birthplace: _____ Party A Date of Birth: Jun-01-1999
Party B Name: Lisa Piper Party B Birthplace: _____ Party B Date of Birth: Jun-01-1999
Place of Marriage: _____ Date of Marriage: Aug-18-2016
Date Entered: Aug-18-2016 Last Updated By: Cecile Test
Status: /New Event/New Event/NA/NA/Not Registered

[Return to Rule Failures](#)

- If you are certain that the record you are working on is not a duplicate then click the **Return to Rule Failures** button to return to the new record.
- Place a checkmark in the checkbox located in the **Override** column and click the **Save Overrides** button to indicate this is not a duplicate record.

Validation Results		Save Overrides	
Error Message		Override	Goto Field Popup
MG3317: A potential duplicate marriage record exists. Please verify Party A and Party B names and dates of birth. Potential Duplicates		<input checked="" type="checkbox"/>	<input type="button" value="fix"/> <input type="button" value="fix"/>

- For records that are duplicates please contact the DAVE Application Support Specialist @ edrs.dhhs@maine.gov to abandon a duplicate record.

Section 5: Entering a New Case

In the exercises that follow, you will learn how to use the **License** pages of the **DAVE™** application to start a marriage record.

Exercise 5.1 – Start/Edit New Case

Skill Learned: How to complete and execute the **Start/Edit New Case** page.

- From the **Home Page**, select **Life Events -> Marriage -> Start/Edit New Case**.

- This will bring up the **Start/Edit New Case** page. Notice that **Party A** and **Party B First, Last Name** and **Date of Marriage** are all marked with red arrows (→). Fields denoted by red arrows are required entries that must be completed before you will be allowed to proceed.

Marriage Start/Edit New Case

Party A First Name:	<input type="text"/>	Party A Last Name:	<input type="text"/>
Party B First Name:	<input type="text"/>	Party B Last Name:	<input type="text"/>
Date of Marriage:	<input type="text"/>	County of Marriage:	<input type="text"/>
City of Marriage:	<input type="text"/>		

Note: Before a new Marriage Record may be created, a search must first be made for any pre-existing records. This is to prevent the creation of duplicate records.

- Once you have filled in the required fields, click the **Search** button to proceed, or click the **Clear** button to clear all entries and start over.

Marriage Start/Edit New Case

Party A First Name:	<input type="text" value="Adam"/>	Party A Last Name:	<input type="text" value="MeWay"/>
Party B First Name:	<input type="text" value="Clara"/>	Party B Last Name:	<input type="text" value="Sybell"/>
Date of Marriage:	<input type="text" value="Nov-19-2015"/>	City of Marriage:	<input type="text"/>
County of Marriage:	<input type="text"/>		

- If no matching records are found, click the **Start New Case** button. Or, to begin a new search, click the **New Search** button.

Marriage Search Results

There are no cases that match the criteria you have entered.
If this is a new case, select the Start New Case button or select the New Search button to perform a new search.

- If a matching event was found, click the underlined link in the **Party A Name** column to open the record.

Marriage Search Results

<u>Case Id</u>	<u>Party A Name</u>	<u>Party B Name</u>	<u>Date of Marriage</u>	<u>Place of Marriage</u>	<u>Preview</u>
99382	<u>MeWay, Adam</u>	Sybell, Clara	Nov-19-2015		

Total records : 1

- For the purposes of this exercise, select **Start New Case**.

Note: All of the column headers on the Search Results page are underlined links. Clicking any of these links will re-sort the table data accordingly.

- Clicking the **Start New Case** button above will launch the **Party A** page, as shown below. The **Home Page** collapses and the **Marriage Registration Menu** expands.

Marriage Registration Menu 308951 : Larry Lion, Tina Tiger Aug-18-2016
 /New Event/New Event/NA/NA/Not Registered

Party A

Preferred Title

Current Name
 First: Larry Middle: Other Middle: Last: Lion Suffix:

[Copy Current Name](#)

Name Prior to First Marriage
 First: Middle: Other Middle: Last: Suffix:

Birthplace
 Birthplace State: Birthplace Country: United States

Date of Birth: Age: Sex:

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

Take Ownership of a Case Started by Another Municipality

There may be occasions when a clerk from one city/town (e.g., Augusta) starts a new case and the search results (shown below) returns a matching case started by a separate city/town (e.g. Portland). The clerk who did not originally start the case, can obtain ownership of the existing case started by another city/town as long as the license has not yet been issued.

1. Click on either Party A name link or Party B name link.

City of Augusta Welcome back: Trainmccs1 Logout

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

Maine Department of Health and Human Services

Marriage Search Results

Case Id	Party A Name	Party B Name	Date of Marriage	Place of Marriage	Preview
308959	Tide, Thomas T.	Cheers, Cindy	Aug-30-2018		Preview

Total records : 1

[Start New Case](#) [New Search](#)

2. A popup message will appear stating “The case you have selected is owned by another Local Office. Press OK to take ownership of this case.”

Marriage Search Results

Case Id	Party A Name	Party B Name	Date of Marriage	Place of Marriage	
308959	Tide, Thomas T.	Cheers, Cindy	Aug-30-2016		Preview

Total records : 1

Start New Case Now Search



3. Click the **OK** button to accept ownership of this case, or click **Cancel**.
4. (Note: If for example the City of Augusta takes ownership of a case started by the City of Portland, both cities will be able to access the record.) The Local Official Office will be system-filled with the town that accepted ownership.

Exercise 5.2 – Party A

Skill Learned: Completion of the **Party A** page.

Marriage Registration Menu

308951 :Larry Lion, Tina Tiger Aug-18-2016
(New Event/New Event/NA/NA/Not Registered)

Party A

Preferred Title
Groom

Current Name
First: Larry Middle: L. Other Middle: Last: Lion Suffix:

Copy Current Name

Name Prior to First Marriage
First: Larry Middle: L. Other Middle: Last: Lion Suffix:

Birthplace
Birthplace State: Maine Birthplace Country: United States

Date of Birth: May-10-1985 Age: 31 Sex: Male



Validate Page Next Clear Save Return

1. Complete **Preferred Title**. Preferred title is used to record titles such as Bride, Groom, Spouse, or None.
2. Complete the **Party A's Current Name**. Enter the **First**, **Middle**, and **Last** name for Party A. If Party A has more than one middle name, include it in the **Other Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..

- Complete the **Party A's Name Prior to First Marriage**. Enter the **First, Middle, and Last** name for Party A. If Party A has more than one middle name, include it in the **Other Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..

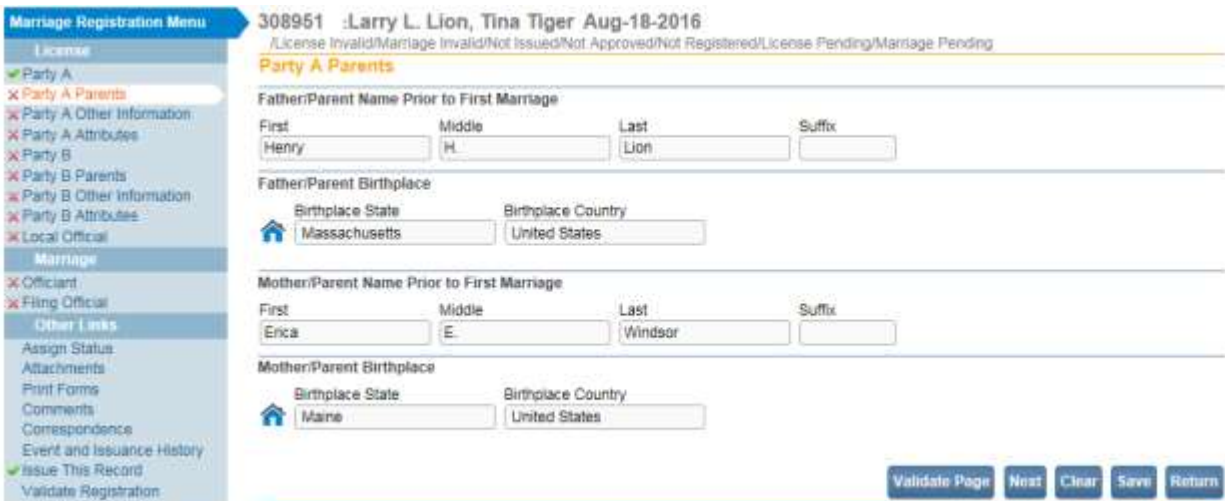
If **Party A's Name Prior to First Marriage** is the same as the **Current Name**, selecting the

Copy Current Name button  will system fill the **Name Prior to First Marriage** with the **Current Name**.

- Complete the **Birthplace State** for Party A. Country is system-filled with United States.
- Enter **Date of Birth** or use the Calendar icon  to launch the **Calendar** control.
- Select the Auto Populate button  to auto-calculate the **Age** for Party A. The **Age** will be system-filled, with the calculated age (current system date – date of birth).
- Select the **Sex** for Party A from the dropdown.
- Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Party A Parents** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results page**.

Exercise 5.3 – Party A Parents

Skill Learned: How to complete the **Party A Parents** page.



308951 :Larry L. Lion, Tina Tiger Aug-18-2016
 /License Invalid/Marriage Invalid/Not Issued/Not Approved/Not Registered/License Pending/Marriage Pending

Party A Parents

Father/Parent Name Prior to First Marriage

First	Middle	Last	Suffix
Henry	H.	Lion	

Father/Parent Birthplace

Birthplace State	Birthplace Country
Massachusetts	United States

Mother/Parent Name Prior to First Marriage

First	Middle	Last	Suffix
Erica	E.	Windsor	

Mother/Parent Birthplace

Birthplace State	Birthplace Country
Maine	United States

Validate Page Next Clear Save Return

- Complete the **Party A's Father/Parent Name Prior to First Marriage**. Enter the **First, Middle, and Last** name. If **Party A's Father/Parent Name Prior to First Marriage** has more than one middle name, also include it in the **Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..

- Complete the **Birthplace State** for **Party A's Father/Parent**. Country is system-filled with United States.
- Complete the **Party A's Mother/Parent Name Prior to First Marriage**. Enter the **First**, **Middle**, and **Last** name for Party A Mother/Parent. If Party A Mother/Parent has more than one middle name, also include it in the **Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..
- Complete the **Birthplace State** for **Party A's Mother/Parent**. Country is system-filled with United States.
- Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Party A Other Information** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results page**.

Exercise 5.4 – Party A Other Information

Skill Learned: How to complete the **Party A Other Information** page.

Party A Other Information

Residence Address

Street Number	Pre Directional	Street Name, Rural Route, etc	Street Designator	Post Directional	Apt #, Suite #, etc.
45	N	Maple	Drive	SE	Apt 5
City or Town	County	State	Country	Zip Code	
Augusta	Kennebec	Maine	United States	04330	


Consent Form Date Signed

Mailing Address
P.O. Box 17, Augusta, Maine 04330

Telephone
207-222-2244

Email
Larrylion@nowhere.com

- Enter **Party A's residence address**. If the Residence street address has a **Pre-Directional** indicator, i.e. *East Eastern St. West*, then indicate that by selecting "E" from the **Pre-Directional** dropdown list. Do NOT type the **Pre-Directional** indicator in the **Street Name** text box.
- If the Residence street address has a **Post-Directional** indicator, i.e. *East Eastern St. W*, then indicate that by selecting "W" from the **Post-Directional** dropdown list. Do NOT type the **Post-Directional** indicator in the **Street Name** text box.
- Enter the **City or Town, County, State, and Zip Code** for **Party A Residence**. Note that the **Country** is system-filled with United States. If Party A did not reside in the United

States, update the **Country** and, if applicable, enter the **City or Town, County, State, and Zip Code** of the foreign country. You may also use the Place lookup control .

4. If Party A is less than 18 years of age, a **Consent Form** must be submitted. Select the **Consent Form** checkbox to indicate a **Consent Form** has been received.
5. If applicable, enter the date the **Consent Form** was signed in the **Date Signed** field.
6. Enter the **Mailing Address** if it differs from the Residence address. Such as a P.O. Box number.
7. Enter the **Telephone** number.
8. Enter the **Email** address.
9. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Party A Attributes** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results Page**.

Exercise 5.5 – Party A Attributes

Skill Learned: How to complete the **Party A Attributes** page.

Party A Attributes

Social Security Number
 None Unknown

Number of this marriage

Previous Marriage Ended By Date last marriage ended (or date of death)

Location (Court if Divorce/Annulment) City and State Name of Former Spouse

Maine Domestic Partnership

1. Enter Party A's **Social Security Number** in the Social Security Number field. If Party A has no SSN then select the None radio button. If Party A's SSN is unknown, select the Unknown radio button.

Social Security Number <input type="text" value="000-00-0000"/> <input checked="" type="radio"/> None <input type="radio"/> Unknown	Social Security Number <input type="text" value="999-99-9999"/> <input type="radio"/> None <input checked="" type="radio"/> Unknown
If the "None" radio button is selected the Social Security Number field will be automatically filled with 000-00-0000.	If the "Unknown" radio button is selected the Social Security Number field will be automatically filled with 999-99-9999.

2. Make a selection from the **Number of this marriage** dropdown list. If this is Party A's first marriage key in "1" from the dropdown. This field cannot be blank.
3. Select from the **Previous marriage ended by** dropdown if **Previous marriage ended by** death, divorce, or annulment. If Party A has not been previously married, leave this field blank.
4. Enter the **Date last marriage ended (or date of death)**. If Party A has not been previously married, leave this field blank.
5. In the **Location** field, enter the **city and state of death** if **Previous marriage ended by death**. Or, if **Previous marriage ended by divorce or annulment**, enter the **name of court, city, and state**.
6. Enter **Former Spouse Name**, if applicable.
7. Select "Yes" or "No" from the **Domestic Partnership** dropdown. If 'yes', must be a **Maine** Domestic Partnership.
8. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Party B** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results Page**.

Exercise 5.6 – Party B

Skill Learned: Completion of the **Party B** page.

Party B

Preferred Title

Current Name

First	Middle	Other Middle	Last	Suffix
<input type="text" value="Rita"/>	<input type="text" value="Rachel"/>	<input type="text" value="Rae"/>	<input type="text" value="Witt"/>	<input type="text"/>

Copy Current Name

Name Prior to First Marriage

First	Middle	Other Middle	Last	Suffix
<input type="text" value="Rita"/>	<input type="text" value="Rachel"/>	<input type="text" value="Rae"/>	<input type="text" value="Witt"/>	<input type="text"/>

Birthplace

Birthplace State	Birthplace Country
<input type="text" value="Maine"/>	<input type="text" value="United States"/>



Date of Birth	Age	Sex
<input type="text" value="Jul-06-1988"/>	<input type="text" value="28"/>	<input type="text" value="Female"/>

Validate Page **Next** **Clear** **Save** **Return**

-
1. Complete **Preferred Title**. Preferred title is used to record titles such as Bride, Groom, Spouse, or None.
 2. Complete the **Party B's Current Name**. Enter the **First, Middle, and Last** name for Party B. If Party B has more than one middle name, include it in the **Other Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..
 3. Complete the **Party B's Name Prior to First Marriage**. Enter the **First, Middle, and Last** name for Party B. If Party B has more than one middle name, include it in the **Other Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..

If **Party B's Name Prior to First Marriage** is the same as the **Current Name**, selecting the

Copy Current Name button  will system-fill the **Name Prior to First Marriage** with the **Current Name**.

4. Complete the **Birthplace State** for Party B. Country is system-filled with United States.
5. Enter **Date of Birth** or use the Calendar icon  to launch the **Calendar** control.
6. Select the Auto Populate button  to auto-calculate the **Age** for Party B. The age will be system-filled with the calculated age (current system date – date of birth).
7. Select the **Sex** for Party B from the dropdown.
8. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Party B Parents** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results Page**.

Exercise 5.7 – Party B Parents

Skill Learned: How to complete the **Party B Parents** page.

Party B Parents

Father/Parent Name Prior to First Marriage

First	Middle	Last	Suffix
<input type="text" value="Ima"/>	<input type="text" value="B."/>	<input type="text" value="Leever"/>	<input type="text"/>

Father/Parent Birthplace

Birthplace State	Birthplace Country
 <input type="text" value="Maine"/>	<input type="text" value="United States"/>

Mother/Parent Name Prior to First Marriage

First	Middle	Last	Suffix
<input type="text" value="Shirley"/>	<input type="text" value="Ann"/>	<input type="text" value="Knot"/>	<input type="text"/>

Mother/Parent Birthplace

Birthplace State	Birthplace Country
 <input type="text" value="Maine"/>	<input type="text" value="United States"/>

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



1. Complete the **Party B's Father/Parent Name Prior to First Marriage**. Enter the **First**, **Middle**, and **Last** name. If **Party B's Father/Parent Name Prior to First Marriage** has more than one middle name, also include it in the **Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..
2. Complete the **Birthplace State** for **Party B's Father/Parent**. Country is system-filled with United States.
3. Complete the **Party B's Mother/Parent Name Prior to First Marriage**. Enter the **First**, **Middle**, and **Last** name. If **Party B's Mother/Parent Name Prior to First Marriage** has more than one middle name, also include it in the **Middle** field. **Suffix** is used to record generational suffixes such as Jr., III, etc..
4. Complete the **Birthplace State** for **Party B's Mother/Parent**. Country is system-filled with United States.
5. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Party B Other Information** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results Page**.


Exercise 5.8– Party B Other Information

Skill Learned: How to complete the **Party B Other Information** page.

Party B Other Information

Residence Address

Street Number	Pre Directional	Street Name, Rural Route, etc	Street Designator	Post Directional	Apt #, Suite #, etc.
55	W	Elm	Street		
City or Town	County	State	Country	Zip Code	
 Augusta	Kennebec	Maine	United States	04330	
Consent Form	<input checked="" type="checkbox"/>	Date Signed	Aug-17-2016		
Mailing Address	P.O. Box 444, Augusta, Maine 04330				
Telephone	207-222-7777				
Email	Party B@nowhere.com				
					<input type="button" value="Validate Page"/> <input type="button" value="Next"/> <input type="button" value="Clear"/> <input type="button" value="Save"/> <input type="button" value="Return"/>

1. Enter **Party B's residence address**. If the street address has a **Pre-Directional** indicator, i.e. *East Eastern St. West*, then indicate that by selecting "E" from the **Pre-Directional** dropdown list. Do NOT type the **Pre-Directional** indicator in the **Street Name** text box.
2. If the street address has a **Post-Directional** indicator, i.e. *East Eastern St. W*, then indicate that by selecting "W" from the **Post-Directional** dropdown list. Do NOT type the **Post-Directional** indicator in the **Street Name** text box.
3. Enter the **City or Town, County, State, and Zip Code** for **Party B Residence**. Note that Country is system-filled with United States. If Party B did not reside in the United States, update the **Country** and, if applicable, enter the **City or Town, County, State, and Zip Code** of the foreign country. You may also use the Place lookup  control.
4. If Party B is less than 18 years of age a **Consent Form** must be submitted. Select the **Consent Form** checkbox to indicate a **Consent Form** has been received.
5. If applicable, enter the date the **Consent Form** was signed in the **Date Signed** field.
6. Enter the **Mailing Address** if it differs from the Residence address. Such as, P.O. Box number.
7. Enter the **Telephone** number.
8. Enter the **Email** address.
9. Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Party B Attributes** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results Page**.

Exercise 5.9 – Party B Attributes

Skill Learned: How to complete the **Party B Attributes** page.

Party B Attributes

Social Security Number
 None Unknown

Number of this marriage

Previous Marriage Ended By Date last marriage ended (or date of death)

Location (Court if Divorce/Annulment) City and State Name of Former Spouse

Maine Domestic Partnership

1. Enter Party B's **Social Security Number** in the Social Security Number field. If Party B has no SSN then select the None radio button. If Party B's SSN is unknown, select the Unknown radio button.

Social Security Number <input type="text" value="000-00-0000"/> <input checked="" type="radio"/> None <input type="radio"/> Unknown	Social Security Number <input type="text" value="999-99-9999"/> <input type="radio"/> None <input checked="" type="radio"/> Unknown
If the "None" radio button is selected the Social Security Number field will be automatically filled with 000-00-0000.	If the "Unknown" radio button is selected the Social Security Number field will be automatically filled with 999-99-9999.


2. Make a selection from the **Number of this marriage** dropdown list. If this is Party B's first marriage select "1" from the dropdown. This field cannot be blank.
3. Select from the **Previous marriage ended by** dropdown if **Previous marriage ended by** death, divorce, or annulment. If Party B has not been previously married, leave this field blank.
4. Enter the **Date last marriage ended (or date of death)**. If Party B has not been previously married, leave this field blank.
5. In the **Location** field, enter the **city and state of death** if **Previous marriage ended by death**. Or, if **Previous marriage ended by divorce or annulment**, enter the **name of court, city, and state**.
6. Enter **Former Spouse Name**, if applicable.
7. Select "Yes" or "No" from the **Domestic Partnership** dropdown. If 'yes', must be a **Maine** Domestic Partnership.

- Click the **Validate Page** button to check this page for errors, the **Next** button to proceed to the **Local Official** page, the **Clear** button to clear all entries, the **Save** button to save changes without leaving this page, or the **Return** button to return to the **Search Results Page**.


Exercise 5.10 – Local Official Page


Skill Learned: How to complete the **Local Official** page.


The Local Official Office will automatically system-fill with the login office.

- Enter the **Intentions Filed Date** or use the Calendar icon  to launch the **Calendar** control.

Local Official

Date License Issued  Waiver Submitted

License Expiration Date 

Intentions Filed Date 

The Date License Issued is system-filled after the license has been issued.

The License Expiration Date is automatically system-filled with the Intentions Filed Date + 90 days.



Issuing Official

Local Official Office

Issuing Official

First Middle Last Suffix

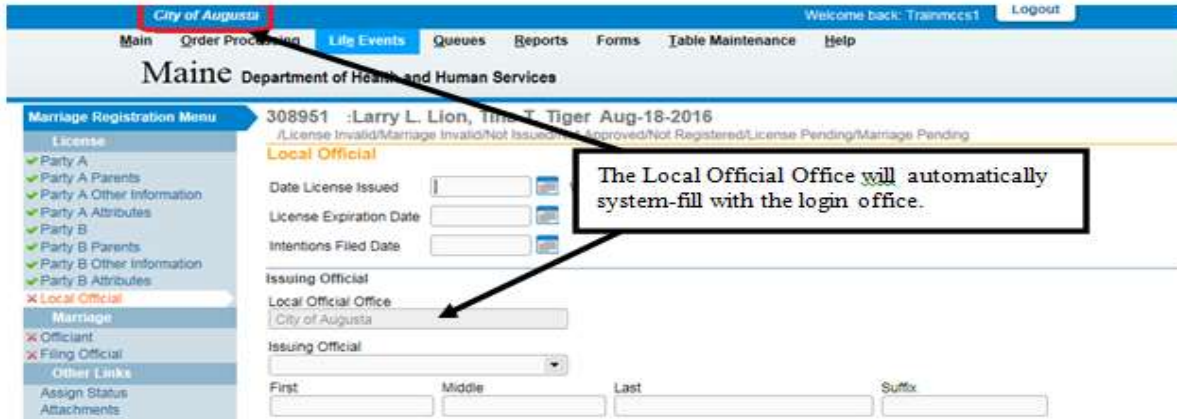
Title

Party A Date Signed  Party B Date Signed 

- The **License Expiration Date** shall be system-filled with the (Intentions Filed Date + 90 days).
- The **Date License Issued** will be system-filled after the license is issued. (This does not apply to a STATE user creating a paper record.)

Date License Issued 

- Select the **Waiver Submitted** checkbox, if a certified copy of a waiver has been obtained for the required 21-day waiting period for Maine divorces. If the **Waiver Submitted** checkbox is not checked, and the 21-day waiting period has not been met, DAVE™ will fire an edit rule at the time the License is being issued. (DAVE™ calculates if the System Date – Date Marriage Ended (in Divorce) is <22 days and Party A or Party B are Maine residents.)
- Enter the date Party A and Party B signed the intentions in the **Party A Date Signed and Party B Date Signed** fields.
- The **Local Official Office** is system-filled with the office selected at login.



7. Select the **Issuing Official** from the dropdown list. The list has been filtered to include only those users in the office selected at login. Begin typing the last name. Enter “Tes”. Notice that as you type, the list is filtered to include only those users that contain the letters “Tes” in the last name.

Issuing Official

tes

Cecile Test

Found 1 matches

Last

Suffix

8. Select the name of the **Issuing Official**. Once selected, the name and title information is system-filled and disabled.

Issuing Official

Test, Cecile

First Middle Last Suffix

Cecile Test

Title

Municipal Clerk

Note: If the incorrect Issuing Official name was selected from the dropdown, and the Validate Page button has already been selected, highlight the name and select the delete button from your keyboard. This will clear both the name and title fields. The dropdown list will then expand again with the names of users to select.

Issuing Official
 Test, Cecile

Cecile Test

Found 1 matches

Municipal Clerk

Highlight the name and depress “delete” if the wrong Issuing Official was selected. This will clear the name and title fields and expand the dropdown list.

- Click the **Validate Page** button to check this page for errors. If no rules fail, the license information is now complete.

Once the license information is completed and errors, if any, are corrected the Status Bar will show *License Valid*. Or, if there are any soft edit errors that were overridden, the Status Bar will indicate *License Valid with Exceptions*.

After the License information is either *License Valid*, or *License Valid with Exception*, the **Approve License** link will appear in the Marriage Registration Menu in the License section as shown below.

The screenshot shows the 'Maine Department of Health and Human Services' web interface. At the top, there is a navigation bar with 'Main', 'Order Processing', 'Life Events', 'Queues', 'Reports', 'Forms', 'Table Maintenance', and 'Help'. Below this is a 'Status Bar' containing the text '308951 - Larry Lion, Tina T. Tiger Aug-18-2016' and a status indicator 'License Valid'. The 'Marriage Registration Menu' is visible on the left, with the 'Approve License' link highlighted in red. A callout box points to the 'Approve License' link, stating: 'The “Approve License” link will only appear after the status License Valid, or License Valid with Exception, appears in the Status Bar.' Another callout box points to the 'Status Bar' text, stating: 'Highlight the name and depress “delete” if the wrong Issuing Official was selected. This will clear the name and title fields and expand the dropdown list.' The main form area contains fields for 'Party A' (Preferred Title: Groom, Current Name: Larry) and 'Party B' (Current Name: Tina). There are also fields for 'Name Prior to First Marriage' (First: Larry, Middle: L, Last: Lion) and 'Birthplace' (State: Maine, Country: United States). At the bottom right, there are buttons for 'Validate Page', 'Next', 'Clear', 'Save', and 'Return'.

Exercise 5.11 – Affirm/Unaffirm License

Skill Learned: How to complete the **Affirmations** page. An affirmation is used to record the fact that the user is affirming that the license information provided is now complete and the couple can legally be married.

- Upon completion and successful validation of all license pages the status bar will show *License Valid* or *License Valid with Exceptions*. A License Approval Required Work Queue

shall be assigned to the case, and an **Approve License** link will be displayed in the **Registration Menu**.

2. Select the **Approve License** menu link in the **Marriage Registration Menu** to open the affirmation page.

308951 :Larry L. Lion, Tina T. Tiger Aug-18-2016
/License Valid/Marriage Invalid/Not Issued/Not Approved/Not Registered/Marriage Pending/License Approval Required

Party A

Preferred Title
Groom

Current Name
First: Larry Middle: L

Copy Current Name

Name Prior to First M
First: Larry Last: Lion Suffix:

Birthplace
Birthplace State: Maine Birthplace Country: United States

Date of Birth: May-10-1985 Age: 31 Sex: Male

Approve License

Until the license is affirmed, the status remains at 'Not Issued'. Once the license is affirmed, the status will change from 'Not Issued' to 'Ready to Issue'.

Select the "Approve License" link to affirm the license.

Validate Page Next Clear Save Return

3. To approve the License, place a checkmark in the **Affirm the following** checkbox and click the **Affirm** button.

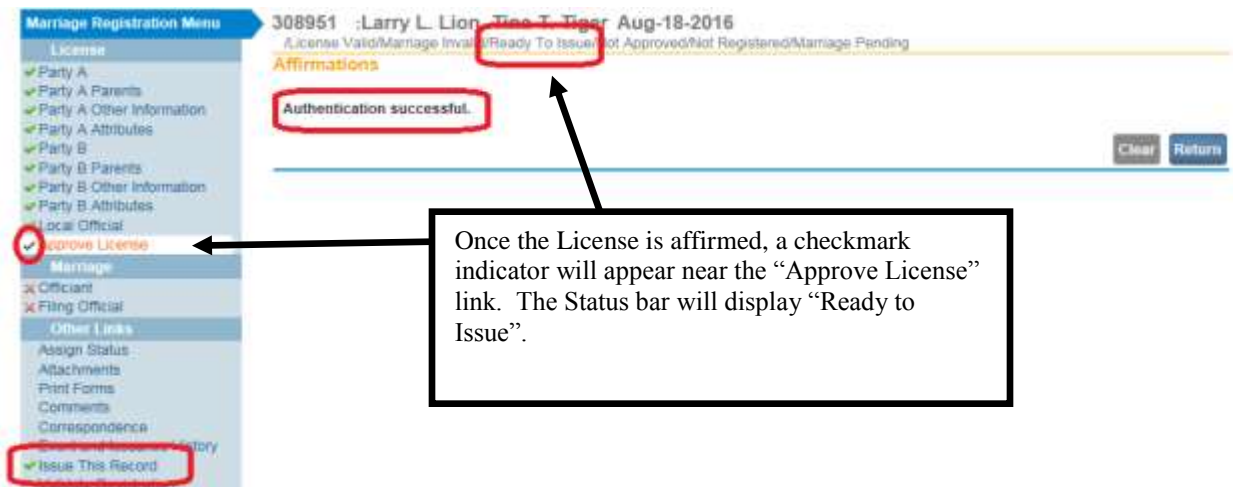
Affirmations

Affirm the following:

I affirm that I have reviewed the information provided and that this couple is legally entitled to be married.

Affirm Clear Return

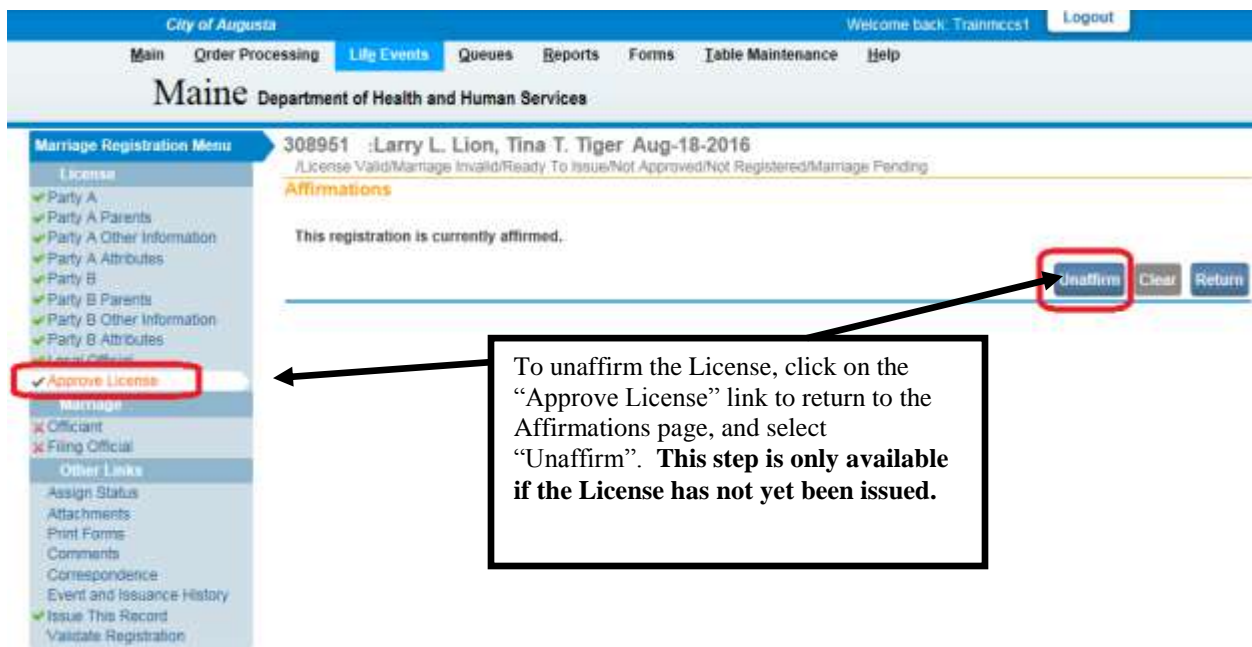
4. The record will be officially approved and an **Authentication Successful** message will be displayed as shown below. Note that the status is now */License Valid/Marriage Invalid/Ready To Issue/Not Approved/Not Registered/Marriage Pending*. The Approve License menu link has a checkmark indicator to show that the License has been affirmed.



Once the License is affirmed, a checkmark indicator will appear near the “Approve License” link. The Status bar will display “Ready to Issue”.

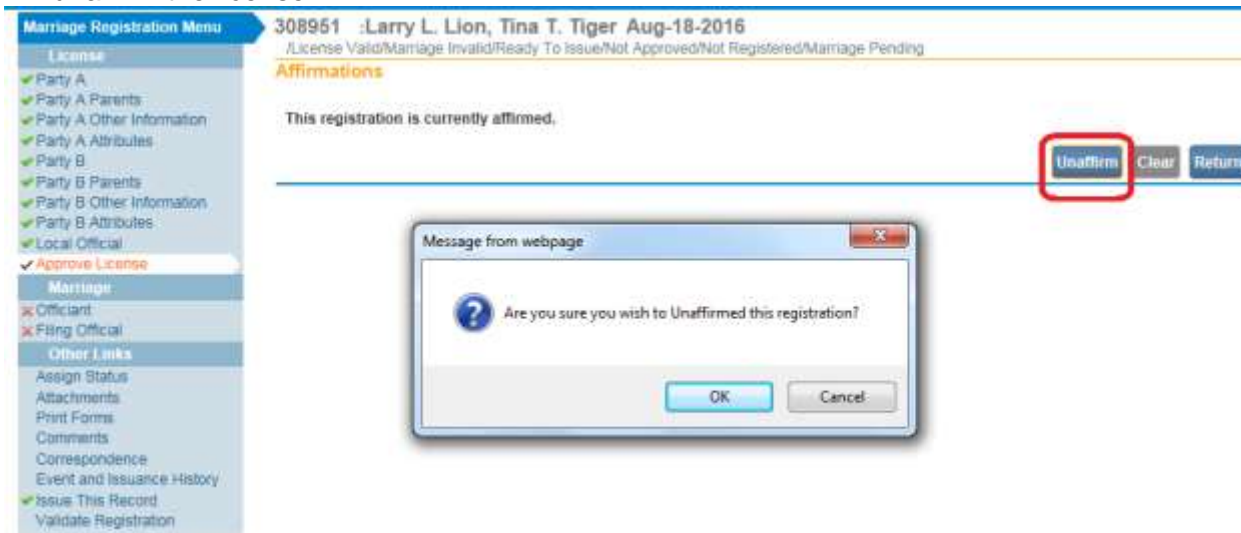
5. Unaffirm the License – There may be occasions that once the clerk has already affirmed the license, that there is a need to go back into the License registration pages and make corrections. To “unaffirm” the license, click on the **Approve License** link again, and select the **Unaffirm** button.

Note: Once the License has been issued the ‘Approve License’ link is no longer available so the License cannot be ‘unaffirmed’.



To unaffirm the License, click on the “Approve License” link to return to the Affirmations page, and select “Unaffirm”. **This step is only available if the License has not yet been issued.**

6. A popup will then appear, as shown below, asking to select OK or Cancel the request to unaffirm the license.



7. If OK is selected, the "Ready to Issue" status is removed from the Status Bar, the **Approve License** link is removed from the Registration Menu, and the **Intentions Filed Date** on the **Local Official** page is also removed. A message will appear "This registration has been Unaffirmed" as shown below.

Affirmations

This registration has been Unaffirmed.

Clear Return

8. Make the corrections in the license registration pages as needed. And, because the License was unaffirmed, the **Intentions Filed Date** on the **Local Official** page will need to be re-entered.

308951 :Larry L. Lion, Tina T. Tiger Aug-18-2016
 /License Invalid/Marriage Invalid/Not Issued/Not Approved/Not Registered/License Pending/Marriage Pending

Local Official

Date License Issued: Waiver Submitted

License Expiration Date: Nov-17-2016

Intentions Filed Date

Issuing Official

Local Official Office:

Issuing Official:

First: Middle: Last: Suffix:

Title:

Party A Date Signed: Party B Date Signed:

Validate Page Next Clear Save Return

Validation Results List All Errors Save Overrides Hide

Error Message	Override	Goto Field	Popup
MG3326: Intentions File Date cannot be Null. Please verify the Intentions File Date	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

- Once all corrections are made and the **Intentions Filed Date** is re-entered, click on the **Validate Page** button.

308951 :Larry L. Lion, Tina T. Tiger Aug-18-2016
 /License Valid/Marriage Invalid/Not Issued/Not Approved/Not Registered/Marriage Pending/License Approval Required

Local Official

Date License Issued: Waiver Submitted

License Expiration Date: Nov-17-2016

Intentions Filed Date: Aug-19-2016

Issuing Official

Local Official Office:

Issuing Official:

First: Middle: Last: Suffix:

Title:

Party A Date Signed: Party B Date Signed:

Validate Page Next Clear Save Return

- The **Approve License** link will appear again. Click on the **Approve License** link to go to the **Affirmations Page** and affirm the license again. The **Ready to Issue** status will reappear in the Status bar.

Exercise 5.12 – Issuing the Marriage License

Skill Learned: How to complete an order for a marriage license and print the license.

1. From the **Marriage Registration Menu**, select **Issue This Record**.

The screenshot displays the web interface for the City of Augusta, Maine Department of Health and Human Services. The top navigation bar includes links for Main, Order Processing, Life Events, Queues, Reports, Forms, Table Maintenance, and Help. The user is logged in as Trainmccst. The main content area shows the Marriage Registration Menu on the left, with 'Issue This Record' highlighted in a red box. The main form area displays details for a marriage license application for Larry L. Lion and Tina T. Tiger, dated Aug-18-2016. The form includes fields for Date License Issued, License Expiration Date (Nov-17-2016), and Intentions Filed Date (Aug-19-2016). The Issuing Official section is populated with 'Local Official Office: City of Augusta' and 'Issuing Official: Test, Cecile'. The form also includes fields for First, Middle, Last, and Suffix names, and a Title dropdown menu set to 'Municipal Clerk'. At the bottom, there are buttons for 'Validate Page', 'Next', 'Clear', 'Save', and 'Return'.

2. The Marriage Fast Order Page is displayed as shown below. The Applicant information is system-filled with “Applicant On File”.
3. In this example, enter the Party’s Name and Address for **Applicant Name** and **Applicant Address**.

20151100018 :Applicant On File
/Keyed/Incomplete

Marriage 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

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

Eligibility

Applicant Relationship: Other Specify:

Event Search

File Number: Year: 2015 Number:
Party A First: Adam Middle: Robert Last: MeWay
Party B First: Clara Middle: Ann Last: Sybell
Date of Marriage Start: Nov-20-2015 End:
Place of Event City: Place of Event County:
Number of rows to be returned:

Select	Date of Event	SFN	Registrant Name	Place of Event
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4. Select the **Applicant Relationship**: Registrant/Self

Eligibility

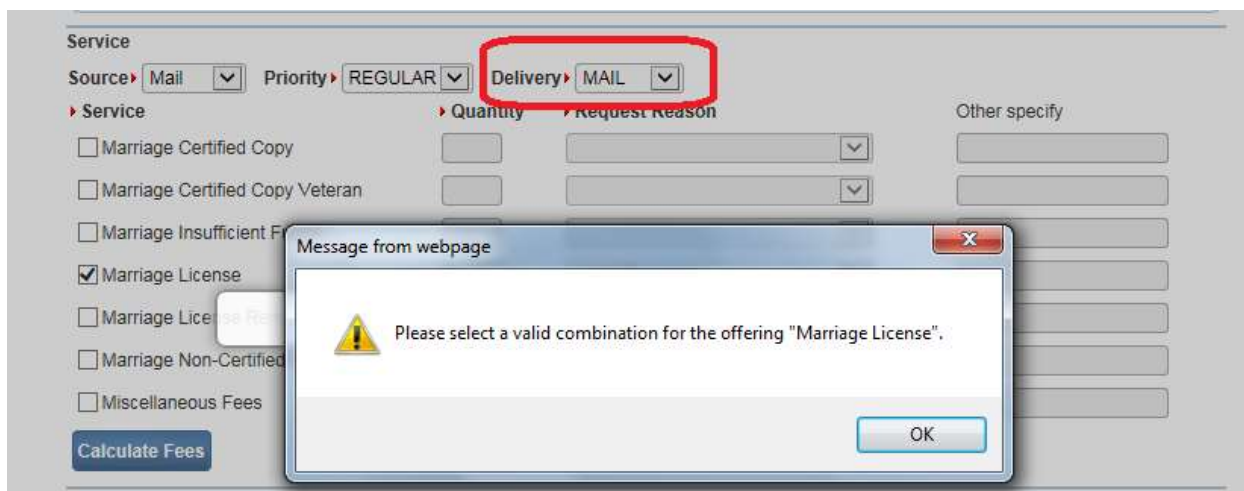
Applicant Relationship: Registrant/Self

5. Select the **Source, Priority and Delivery** from the dropdown lists.

Service

Source: Walk in Priority: REGULAR Delivery: Counter

The delivery type for 'License' must always be 'Counter' as the License must be given in person to obtain a signature. If, instead 'mail' is selected, the error shown below will popup.



6. Select the **Marriage License** checkbox. Enter **Quantity** = 1 and select a **Request Reason**.

Service

Source ▶ Walk in ▼ Priority ▶ REGULAR ▼ Delivery ▶ Counter ▼

▶ Service	▶ Quantity	▶ Request Reason	Other specify
<input type="checkbox"/> Marriage Certified Copy	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Certified Copy Veteran	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Insufficient Funds	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Marriage License	1	Legal Purposes ▼	<input type="text"/>
<input type="checkbox"/> Marriage License Reissue	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Non-Certified Copy	<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

7. Select the **Calculate Fees** Button.

Service

Source ▶ Mail ▼ Priority ▶ REGULAR ▼ Delivery ▶ Counter ▼

▶ Service	▶ Quantity	▶ Request Reason	Other specify
<input type="checkbox"/> Marriage Certified Copy	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Certified Copy Veteran	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Insufficient Funds	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Marriage License	1	Legal Purposes ▼	<input type="text"/>
<input type="checkbox"/> Marriage License Reissue	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Non-Certified Copy	<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

Note: If for any reason once the License is issued, and another License issuance is required, select the "Marriage License Reissue" link.

8. Select the checkbox next to the customer's type of payment. Select **Cash**. Notice that the amount is system-filled.

Payments

Cash

Payment ▶ 40.00

Check

Refund

SubTotal:	\$40.00
Total:	= \$40.00
Paid:	\$0.00
Balance:	= \$40.00
Change Due:	\$0.00

9. Select the **Save & Validate** Button.

Event Requested

Event Type: Marriage

Relation: Other, specify

Status: /License Valid/Marriage Invalid/Ready To Issue/Not Approved/Not Registered/Marriage Pending

Comments:

Receipt Mailing Envelope Mailing Label

Matched Events

Registrant	Match	Total Number of Issuances	Date of Last Issuance
Larry L. Lion	<input checked="" type="checkbox"/>	0	

Services

Service Name	Quantity	Priority	Delivery	Fee	Issue
Marriage License	1	REGULAR	Counter	\$40.00	<input type="button" value="Issue"/>

Next Order Copy to New Take me to Regular Order Void Issuance History Clear Return

Tip: Clicking the "Yes" under the Match column will return you to the case.

10. If no rules fail, the **Issue** link will be enabled. Select the **Issue** link as shown above.

Note: If any edit rules fire, return to the record to make the necessary corrections. The License will need to be "unaffirmed" prior to making corrections as described above. The Intentions Filed Date will need to be re-keyed, and the license will then need to be re-affirmed. Then, select the "Issue this Record" link to return to the order page.

11. The **Issuance** Page will display. Select the **checkbox** at the beginning of the row, or if there is more than one row, click on the **All** column header and **DAVE™** will automatically place a checkmark in all the rows. Select the **Print Issuance** link.

Issuance

Issuances

All	Applicant Name	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Applicant On File	Marriage License	08/19/2016	REGULAR	Counter	Larry L. Lion			

Total records : 1

Actions

Void Complete

Numbering

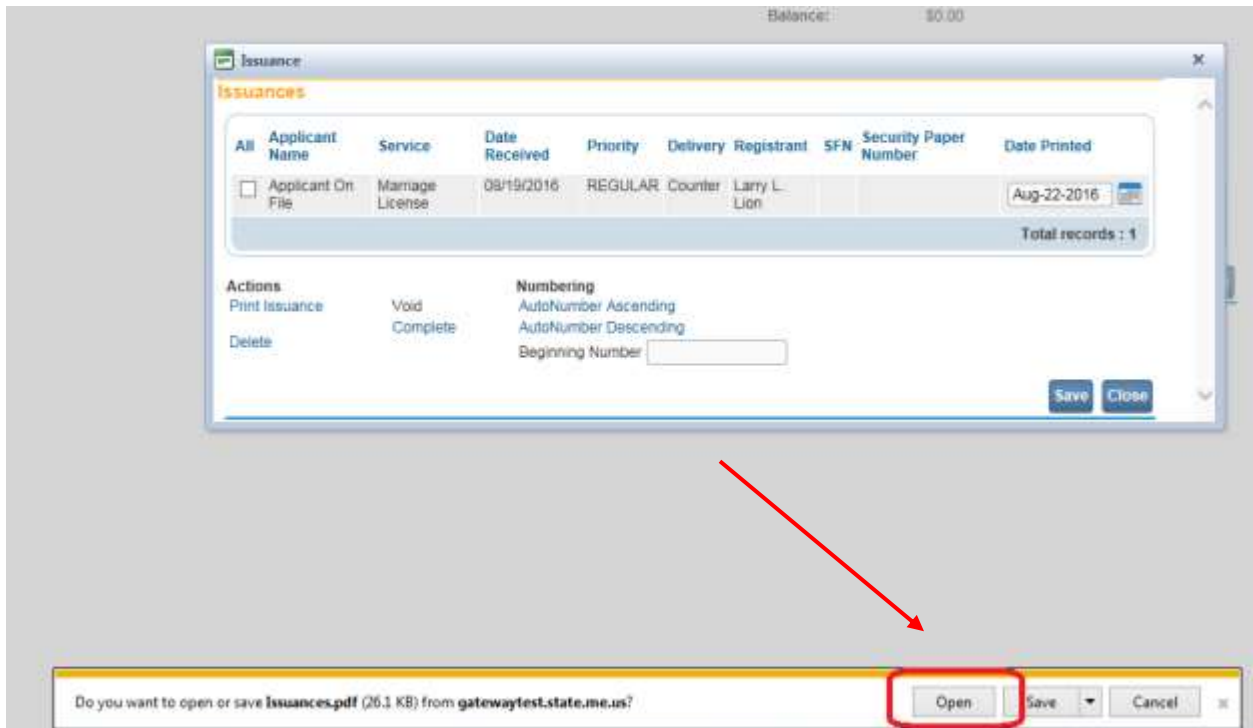
AutoNumber Ascending

AutoNumber Descending

Beginning Number

Save Close

12. Select "Open" from the popup dialog box.



- The browser's print control will display. The control will vary based on the browser software and version you are using. Open the license document and a PDF will be rendered to the page.



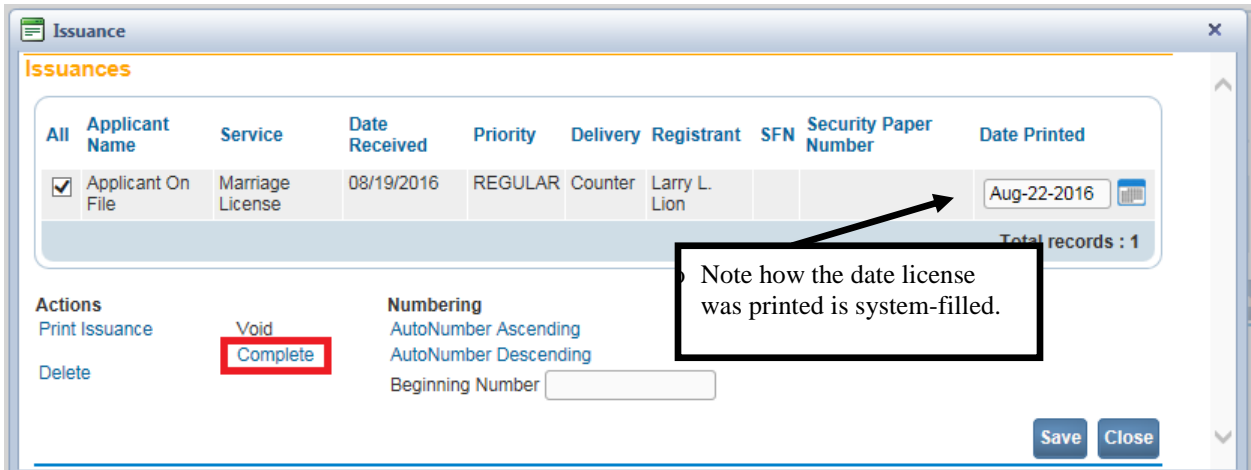
State of Maine
Department of Health and Human Services
Marriage License

Case ID: 308951

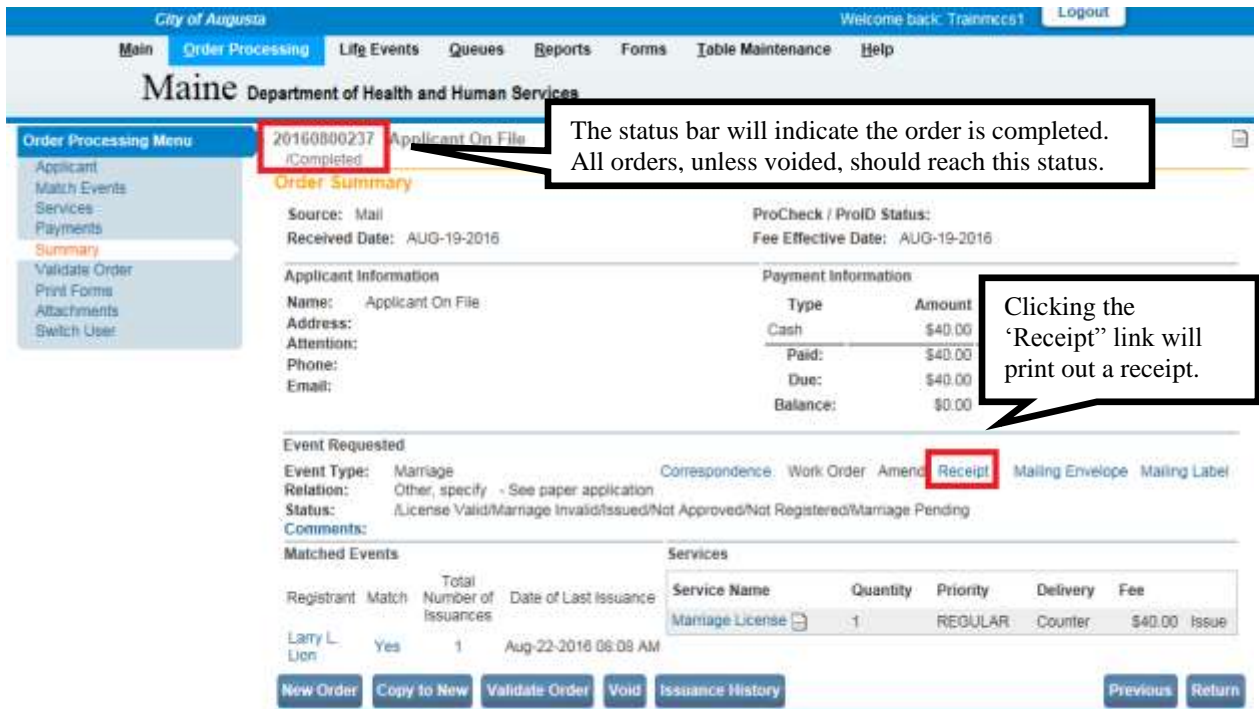
Party A	1. Preferred Title <input type="checkbox"/> Bride <input checked="" type="checkbox"/> Groom <input type="checkbox"/> Spouse <i>(check one)</i>			
	2. Current Full Name <i>(First, Middle, Last, Suffix)</i> Larry L. Lion			
	3. Date of Birth <i>(mm/dd/yyyy)</i> 05/10/1985	4. Age 31	5. Sex <input type="checkbox"/> Female <input checked="" type="checkbox"/> Male	6. Number of this Marriage 2
	7. Residence Address <i>(City/Town)</i> Augusta	8. County Kennebec	9. State ME	10. Country United States
Party B	11. Preferred Title <input checked="" type="checkbox"/> Bride <input type="checkbox"/> Groom <input type="checkbox"/> Spouse <i>(check one)</i>			
	12. Current Full Name <i>(First, Middle, Last, Suffix)</i> Tina T. Tiger			
	13. Date of Birth <i>(mm/dd/yyyy)</i> 05/22/2000	14. Age 16	15. Sex <input checked="" type="checkbox"/> Female <input type="checkbox"/> Male	16. Number of this Marriage 2
	17. Residence Address <i>(City/Town)</i> Augusta	18. County Kennebec	19. State ME	20. Country United States
Issuing Official	License to Marry This Section to be Completed by Issuing Official			
	Certification/Affirmation of Issuing License: I affirm that I have reviewed the information provided and this couple is legally entitled to be married.			
	21. Date Intentions Filed <i>(mm/dd/yyyy)</i> 08/19/2016	22. Date License Expires <i>(mm/dd/yyyy)</i> 11/20/2016	23. Date License Issued <i>(mm/dd/yyyy)</i> 08/22/2016	

- Select the printer icon in the upper left corner to print the license.

15. Next, select the **checkbox** at the beginning of the row and then select the **Complete** link.



16. Clicking the **Complete** link will return you to the order **Summary** page. All orders should reach the **Completed** status as shown below.



After the License has been issued, the **Date License Issued** is automatically system-filled by **DAVE™** on the Local Official registration page as shown below.

Local Official

Date License Issued Waiver Submitted

License Expiration Date

Intentions Filed Date

Issuing Official

Local Official Office

Issuing Official

First Middle Last Suffix

Title

Party A Date Signed Party B Date Signed

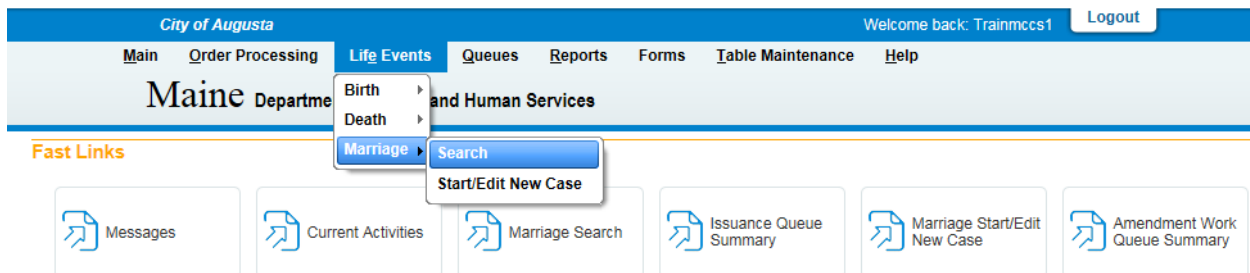
Note that once the License has been issued, the Status Bar has changed from “**Ready to Issue**” to “**Issued**”.

▶ 308951 :Larry L. Lion Tina T. Tiger Aug-23-2016
/License Valid/Marriage Invalid/Issued/Not Approved/Not Registered/Marriage Pending

Exercise 5.13 – Marriage – Officiant and Filing Official

Skill Learned: How to enter the marriage information after it is returned from the Officiant. In order to enter the marriage information, you can locate the case using the search feature or by using the work queues. In this exercise we will use the Search feature.

1. From the **Home Page** select **Life Events -> Marriage -> Search**.



2. From the **Person/Organization** dropdown list, select **Party A** and enter **Last Name**.

Search for a Marriage Record

Search by Identifier:
Enter one of these items

File Number: Year:

Case Id: Number:

Date of Marriage: Start:

File Date: End:

Place of Marriage Location Type:

Place of Marriage:

Place of Issuance Type:

Place of Issuance:

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:

Sex:

SSN:

Date of Birth: Start: End:

3. Click the **Search** button to execute the search and retrieve matching records.
4. Select the **Party A Name** link.

Marriage Search Results

Case Id	SFN	Party A Name	Party B Name	Date of Marriage	Place of Marriage	Preview
308951		Lion, Larry L.	Tiger, Tina T.	Aug-23-2016		<input type="button" value="Preview"/>

Total records : 1

5. The **Party A** page will display.

Officiant Page

1. Select the **Officiant** link from the **Marriage Registration Menu**.

Marriage Registration Menu 308951 -Larry L. Lion, Tina T. Tiger Aug-23-2016
 (License Valid/Marriage Invalid/Issued/Not Approved/Not Registered/Marriage Pending)

Party A

Preferred Title
 Groom

Current Name
 First: Larry Middle: L. Other Middle: Last: Lion Suffix:

Copy Current Name

Name Prior to First Marriage
 First: Larry Middle: L. Other Middle: Last: Lion Suffix:

Birthplace
 Birthplace State: Indiana Birthplace Country: United States

Date of Birth: May-10-1985 Age: 31 Sex: Male

Validate Page Next Clear Save Return

2. The **Officiant** page will display.

Officiant

Date of Marriage: Aug-23-2016 Ceremony Type: Civil

Place of Marriage
 City or Town: County: State:

Officiant Name
 First: Middle: Last: Suffix:
 Title: Other Specify:

Officiant Address
 Street Number: Pre Directional: Street Name, Rural Route, etc.: Street Designator: Post Directional: Apt #, Suite #, etc.:
 City or Town: County: State: Country: United States Zip Code:

Phone Number: ___-___-___ Ext: ___

Witness Name
 First: Middle: Last: Suffix:


Witness Name
 First: Middle: Last: Suffix:

Officiant Email

Date of Commission / Expiration


- On the Officiant page, note that the **Date of Marriage** is system-filled with the 'required' date entered when the case was originally started. If the date of marriage has changed, enter the correct date.

Officiant

Date of Marriage  **Ceremony Type**

Place of Marriage

City or Town **County** **State**




The date of marriage on the officiant page is system-filled by DAVE™ using the same date entered on the Start/Edit New Case page. If the date has since changed, enter the correct date.

Marriage Start/Edit New Case

Party A First Name: **Party A Last Name:**



Party B First Name: **Party B Last Name:**


Date of Marriage:  **City of Marriage:**

County of Marriage:

The Date of Marriage is a required field when start/edit a new case.

Important: If the date of marriage has changed since the start of the record, and as a result the change affects the age of one or both parties, an edit rule(s) will fire indicating which party's age needs to be corrected.

Validation Results			
Error Message	Override	Goto Field	Popup
MG0047: Party A's age is inconsistent with Date of Marriage calculated age. Please verify Party's Age.	<input type="checkbox"/>	<input type="button" value="fix"/> 	<input type="button" value="fix"/> 

- Select the **Ceremony Type** from the dropdown list.
- Enter the **Place of Marriage** City or Town and County of marriage or use the Place Lookup . The state defaults to Maine.
- Enter the **Officiant Name** and select a **Title** from the dropdown list. If the **Title** is not listed in dropdown, select the **Other Civil or Other Religious** from the **Title** dropdown and specify the **Title** in the Other Specify textbox as shown below. Be as specific as possible. For example, 'priest' instead of 'cleric'.

Title Other Specify

Other Civil

- Enter the **Officiant Address**. If the street address has a **Pre-Directional** indicator, i.e. *East Eastern St. West*, then indicate that by selecting “E” from the **Pre-Directional** dropdown list. Do NOT type the **Pre-Directional** indicator in the **Street Name** text box.

Officiant Address

Street Number **Pre Directional** Street Name, Rural Route, etc. Street Designator **Post Directional** Apt #, Suite #, etc.

City or Town County State Country Zip Code

- If the street address has a **Post-Directional** indicator, i.e. *East Eastern St. SW*, then indicate that by selecting “SW” from the **Post-Directional** dropdown list. Do NOT type the **Post-Directional** indicator in the **Street Name** text box.
- Enter the **City or Town, County, State, and Zip Code** for the **Officiant** or use the **Place Lookup** . The **Country** is system-filled with United States.
- Enter the **Officiant’s Phone Number**.
- Complete the two **Witness Names**. Enter the **First, Middle, and Last** name for each witness. **Suffix** is used to record generational suffixes such as Jr., III, etc.
- Enter the Officiant’s **Email** address.
- Enter the Officiant’s **Date of Commission / Expiration Date**.
- Click the **Validate Page** button to check this page for errors.

Filing Official

- Select the **Filing Official** link from the **Marriage Registration Menu**.

Marriage Registration Menu 308951 : Larry L. Lion, Tina T. Tiger Aug-23-2016

(License Valid/Marriage Invalid/Issued/Not Approved/Not Registered/Marriage Pending)

Filing Official

Filing Official

First Middle Last Suffix

Title

Local File Date

2. Select the **Filing Official** from the **Filing Official** dropdown.

Filing Official
 

3. The **Filing Official** name and title will be system-filled.

Filing Official


Filing Official
Clerk, Augusta

First Middle Last Suffix
Augusta Clerk


Title
Municipal Clerk

Local File Date 

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

4. Enter the **Local File Date** or use the Calendar icon  to launch the **Calendar** control. The **Local File Date** is the date the municipal office accepted the Officiant's marriage certificate for filing.
5. Click the **Validate Page** button to check this page for errors.

Once the **Officiant** and **Filing Official** pages are complete the Status Bar will change from *Marriage Invalid* to *Marriage Valid* or *Marriage Valid with Exceptions*. A Filing Approval Required Work Queue status shall be assigned to the case, and the **Approve Filing** link shall be displayed in the **Registration Menu**.



308951 - Larry L. Lion, Tina T. Tiger Aug-23-2016
(License Valid) **Marriage Valid** (Issued/Not Approved/Not Registered/Filing Approval Required Work Queue)

Approve Filing

The 'Approve Filing' link will become visible when the status has reached *Marriage Valid* or *Marriage Valid with Exceptions*. And, the license must have been issued.

Exercise 5.14 – Approve for Filing

Skill Learned: How to complete the **Affirmations** page. An affirmation is used to record the fact that the marriage information is complete and the marriage certificate can be approved for filing.

1. Upon completion and successful validation of all Marriage pages, a new **Approve Filing** page will be made available to the municipal clerk. Select the **Approve Filing** menu link to open the Affirmations page.

Note: The 'Approve Filing' link will not be visible until the License has been issued.

The screenshot shows the 'Affirmations' page for record 308951 (Larry L. Lion, Tina T. Tiger, Aug-23-2016). The status bar at the top indicates 'Not Approved'. The 'Approve Filing' link in the left-hand menu is highlighted with a red box. A red arrow points from the 'Not Approved' status to a text box that reads: 'Note the status bar indicates 'Not Approved' because the filing has not yet been affirmed. Once the filing has been approved, the status will change from 'Not Approved' to 'Approved'.' The 'Affirm' button is also visible at the bottom right.

Note: If the Filing Official name keyed into DAVE™ is someone who does not have filing rights, the 'Approve Filing' link will not appear. In addition, if someone other than the Filing Official is logged in, the Approve Filing link will not appear until the Filing Official logs into DAVE™ to affirm the record.

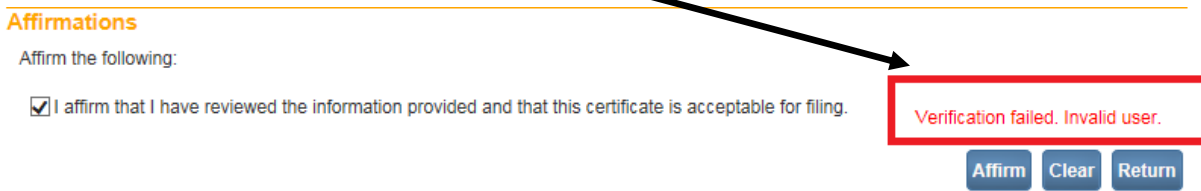
2. To Approve the Marriage Information, place a checkmark in the **Affirm the following** checkbox and click the **Affirm** button.

The screenshot shows the 'Affirmations' page with the checkbox for 'I affirm that I have reviewed the information provided and that this certificate is acceptable for filing' checked. The 'Approve Filing' link in the left-hand menu is highlighted with a red box. The 'Affirm' button at the bottom right is also highlighted with a red box.

- The record will be approved for filing and an **Authentication Successful** message will be displayed.



- If the user affirming the marriage information does not match the name shown on the Filing Official page, and have filing privileges, the following popup will appear.



- If an error is discovered after affirming the record, and the certificate has not yet been issued, click on the **Approve Filing** menu link, and select "Unaffirm". Make the corrections, and select the **Approve Filing** menu link to re-affirm the record again.



Exercise 5.15 – Registering the Record

Skill Learned: How to register the record.

Note: Access to the Registration Approval link is based on user security privileges.

Once the License has been issued, and the Marriage registration has been approved for filing, the record will be assigned a '**Registration Approval Required**' work queue, and the **Registration Approval** link will display under the **Other Links** sub menu.

308964 :Andy A. Jones, Belinda B. Peters Sep-01-2016
 /License Valid/Marriage Valid/Issued/Approved/Not Registered /Registration Approval Required

1. Click on the **Registration Approval** link. The **Approve Registration** page will appear.

Approve Registration

License Information 

Reject Reason

Marriage Information 

Reject Reason

Clear **Save** **Return**

Preview

Case Id: 308964	Date Filed:	Party A Date of Birth: Jun-02-1988
File Number:	Party A Birthplace: Maine	Party B Date of Birth: Oct-10-1988
Party A Name: Andy A. Jones	Party B Birthplace: Maine	
Party B Name: Belinda B. Peters	Date of Marriage: Sep-01-2016	
Place of Marriage: Augusta, Kennebec	Last Updated By: Cecile Test	
Date Entered: SEP-01-2016		
Status: /License Valid/Marriage Valid/Issued/Approved/Not Registered/Registration Approval Required		

2. Select from the License Information dropdown 'Approve'.

Approve Registration

License Information ▾
Reject Reason

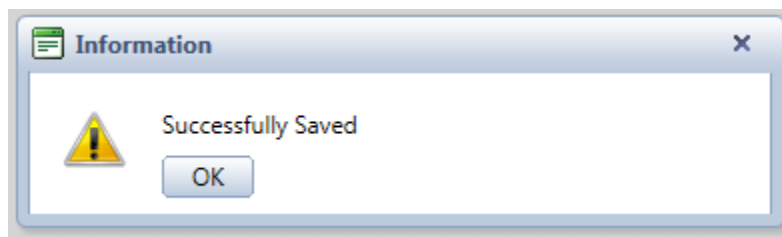
Approve
Reject

3. Select from the Marriage Information dropdown 'Approve'.

Marriage Information ▾
Reject Reason

Approve
Reject

4. Click the **Save** button. A popup will appear stating "Successfully Saved".



5. The record is now registered. The '**Registration Approval Required**' work queue is removed from the status bar, and a new status '**Registered**' is assigned.

308964 2016000032 :Andy A. Jones, Belinda B. Peters Sep-01-2016
/License Valid/Marriage Valid/Issued/Approved/Registered

6. **Dave™** assigns a State File Number to the record once it is registered.

308964 2016000032 :Andy A. Jones, Belinda B. Peters Sep-01-2016
/License Valid/Marriage Valid/Issued/Approved/Registered

Party A

Preferred Title
Groom ▾

Once a case is registered a State File Number (SFN) is assigned to the case.

7. **Dave™** also assigns a File Date (date registered).

Record Source ▾ Electronic ▾
State File Number 000032
File Date Sep-01-2016

8. An internal message is sent to all users affiliated with the municipal office.

Internal Message:.



9. An external email is sent to the Issuing Official who affirmed the License.



Exercise 5.16 – Issuing the Marriage Certificate

Skill Learned: How to issue the Marriage Certificate.

Once the record is '**Registered**' the Marriage Certificate can be issued.

IMPORTANT: Before proceeding with issuing a Marriage Certificate (or any other document requiring safety paper) check that safety paper has been added into the **DAVE™** system. See Section 11 on how to add Safety Paper in **DAVE™**.

1. Select the **Marriage Registration Menu> Issue this Record** link.

Marriage Registration Menu

- License
 - ▶ Party A
 - ▶ Party A Parents
 - ▶ Party A Other Information
 - ▶ Party A Attributes
 - ▶ Party B
 - ▶ Party B Parents
 - ▶ Party B Other Information
 - ▶ Party B Attributes
- Marriage
 - ▶ Local Official
 - ▶ Officiant
 - ✓ **Approve Filing**
- Other Links
 - Assign Status
 - Attachments
 - Print Forms
 - Comments
 - Event and Issuance History
 - ▶ **Issue This Record**
 - Validate Registration

299070 :David D. Durant, Cynthia C. Cyr May-10-2016
 /License Valid/Marriage Valid/Issued/Approved/Not Registered/Registration Approval Required

Affirmations

Authentication successful.

The Marriage Fast Order page will display.

2. The Applicant name will default to 'Applicant on File'.

Name

Prefix	▶ First	Middle	▶ Last	Suffix
<input type="text"/>	<input type="text" value="Applicant"/>	<input type="text" value="On"/>	<input type="text" value="File"/>	<input type="text"/>

3. Complete the required fields: Source, Priority and Delivery.
4. Select the service "Marriage Certified Copy".
5. Select the Quantity
6. Select the Reason

Service

Source ▶ Mail ▼ Priority ▶ REGULAR ▼ Delivery ▶ MAIL ▼

Service	Quantity	Request Reason	Other specify
<input checked="" type="checkbox"/> Marriage Certified Copy	1	Legal Purposes ▼	
<input type="checkbox"/> Marriage Certified Copy Veteran			
<input type="checkbox"/> Marriage Insufficient Funds			
<input type="checkbox"/> Marriage License			
<input type="checkbox"/> Marriage License Reissue			
<input type="checkbox"/> Marriage Non-Certified Copy			
<input type="checkbox"/> Miscellaneous Fees			

Calculate Fees

7. Click the **Calculate Fees** button.

8. Select the Payment type cash.

Payments

Cash

Payment ▶ 15.00

Check

Refund

SubTotal:	\$15.00
Total:	= \$15.00
Paid:	\$0.00
Balance:	= \$15.00
Change Due:	\$0.00

9. Click the **Save & Validate** button. The **Issue** link will become enabled if there are no errors.

Matched Events				Services					
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee	
James J Day	Yes	1	Sep-09-2016 02:05 PM	Marriage Certified Copy	1	REGULAR	MAIL	\$15.00	Issue

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

10. Click the **Issue** link.

11. The **Issuance** Page will display. Select the **checkbox** at the beginning of the row, or if there is more than one row, click on the **All** column header and **DAVE™** will automatically place a checkmark in all the rows. Select the **Print Issuance** link.

Issuance

Issuances

All	Applicant Name	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Applicant On File	Marriage Certified Copy	09/09/2016	REGULAR	MAIL	James J Day	2016000034		

Total records : 1

Actions

Print Issuance

Delete

Void Complete

Numbering

AutoNumber Ascending

AutoNumber Descending

Beginning Number

Save Close

12. Select "Open" from the popup dialog box to view the Marriage Certificate.

Do you want to open or save Issuances.pdf (15.0 KB) from gatewaytest.state.me.us?

Open Save Cancel

NOTE: Be sure safety paper is assigned in the system before printing the certificate. See Section 11 on adding safety paper to the system.

13. Place the safety paper in the printer.
14. Select the printer icon in the upper left corner to print the certificate.



Department of Health and Human Services
Certificate of Marriage

State File Number 118- 2016-000034					
1. Party A: Current Full Name James J Day					
2. Name Prior to First Marriage James J Day			3. Residence Augusta, ME		
4. Date of Birth or Age February 12, 1988	5. Sex Male	6. Birthplace Maine		7. Number of this Marriage 1	
8. Name Father/Parent Joseph J. Day			9. Birthplace Father/Parent Maine		

15. Key in the safety paper number used into the Security Paper Number field as shown below.

The screenshot shows a software window titled "Issuance" with a sub-header "Issuances". It contains a table with the following columns: All, Applicant Name, Service, Date Received, Priority, Delivery, Registrant, SFN, Security Paper Number, and Date Printed. A single record is displayed with a checked checkbox in the "All" column and the Security Paper Number "CS0000000360" highlighted in red. Below the table, there are "Actions" (Print Issuance, Delete) and "Numbering" options (AutoNumber Ascending, AutoNumber Descending, Beginning Number). The "Complete" link is highlighted in red. "Save" and "Close" buttons are at the bottom right.

All	Applicant Name	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Applicant On File	Marriage Certified Copy	09/09/2016	REGULAR	MAIL	James J Day	2016000034	CS0000000360	Sep-09-2016

Total records : 1

Actions: Print Issuance, Delete

Numbering: AutoNumber Ascending, AutoNumber Descending, Beginning Number []

Complete

Save Close

- Next, select the **checkbox** at the beginning of the row and then select the **Complete** link. User is returned to the fast order screen.

The order status is now “/completed”.

20160900005 :Applicant On File
/Completed
Marriage Fast Order

Section 6: Amendments

Exercise 6.1 – Amendments

Amendments are corrections to a registered record.

Skill Learned: How to do amendments to marriage records.

- Open the registered case that needs to be amended.
- In the **Marriage Registration Menu** select from the **Other Links** sub-menu the **Amendments** link. The **Amendments Page** will open.

Marriage Registration Menu 308976 2016000035 :Randy R. Richards, Brenda B. Brewer Sep-12-2016
 /License Valid/Marriage Valid/Issued/Approved/Registered

Party A

Preferred Title
 Groom

Current Name

First	Middle	Other Middle	Last	Suffix
Randy	R.		Richards	

Copy Current Name

Name Prior to First Marriage

First	Middle	Other Middle	Last	Suffix
Randy	R.		Richards	

Birthplace

Birthplace State	Birthplace Country
Maine	United States

Date of Birth: Mar-11-1985 Age: 31 Sex: Male

Validate Page Next Clear Save Retn

Notice when the **Amendments** link is selected the **Marriage Registration Menu** is removed from the page, and the Amendment Page is displayed.

3. Select the amendment **Type** from the dropdown.

Amendments Menu 308976 2016000035 :Randy R. Richards, Brenda B. Brewer Sep-12-2016
 /License Valid/Marriage Valid/Issued/Approved/Registered

Amendment Page

Type: VS7 - Before 90 Days Amendment Date: [dropdown]

Year: [input] Amendment Number: [input]

Order Number: [input] Description: Personal Affidavit

Amendment Status: [input] Microfilm Number: [input]

Add Documentary Evidence

Save Clear Return

4. Add a description of the amendment in the **Description** field.
5. Click the **Save** button.

Notice the **Amendment Menu** will expand as shown below and the **Marriage Registration Menu** will appear.

Amendments Menu

- Amendment
- Processing History
- Supporting Information
- Attachments
- Change History
- Amendment Affirmation
- Correspondence

Marriage Registration Menu

- License
- Party A
- Party A Parents
- Party A Other Information
- Party A Attributes
- Party B
- Party B Parents
- Party B Other Information
- Party B Attributes
- Local Official

308976 2016000035 :Randy R. Richards, Brenda B. Brewer Sep-12-2016
 .License Valid/Marriage Valid/Issued/Approved/Registered

Amendment Page

Type: VS7 - Before 90 Days Amendment Date: Sep-12-2016
 Year: 2016 Amendment Number: 21832
 Order Number: Description: Personal Affidavit
 Amendment Status: Keyed Microfilm Number:

Select Add Documentation to add documentary evidence to this amendment.

Add Documentary Evidence

Page to Amend

Save Clear Return

- From the **Page to Amend** dropdown, as shown above, select the registration page that needs to be corrected. In this example, select the Marriage Party A page in order to change the middle name on the record from “R.” to “Robert”.

Amendments Menu

- Amendment
- Processing History
- Supporting Information
- Attachments
- Change History
- Amendment Affirmation
- Correspondence

Marriage Registration Menu

- License
- Party A
- Party A Parents
- Party A Other Information
- Party A Attributes
- Party B
- Party B Parents
- Party B Other Information
- Party B Attributes
- Local Official
- Marriage
- Officiant
- Filing Official
- Registrar
- Identifiers

308976 2016000035 :Randy R. Richards, Brenda B. Brewer Sep-12-2016
 .License Valid/Marriage Valid/Issued/Approved/Registered

Amendment Page

Type: VS7 - Before 90 Days Amendment Date: Sep-12-2016
 Year: 2016 Amendment Number: 21832
 Order Number: Description: Personal Affidavit
 Amendment Status: Keyed Microfilm Number:

Select Add Documentation to add documentary evidence to this amendment.

Add Documentary Evidence

Page to Amend

- Marriage Party A
- Marriage Party B
- Marriage Identifiers
- Marriage Officiant
- Marriage Party A Attributes
- Marriage Party B Attributes
- Marriage Party A Parents
- Marriage Party B Parents
- Marriage Local Official
- Marriage Party A Other Information
- Marriage Party B Other Information
- Marriage Filing Official

Save Clear Return

- When the Party A page is selected from the **Page to Amend** dropdown, the Party A page will appear as shown below.

Amendment Page

Type	VST - Before 90 Days	Amendment Date	Sep-12-2016
Year	2016	Amendment Number	21832
Order Number		Description	Personal Affidavit
Amendment Status	Keyed	Microfilm Number	



Select Add Documentation to add documentary evidence to this amendment.

Add Documentary Evidence

Page to Amend

Party A

Preferred Title

Current Name

First	Middle	Other Middle	Last	Suffix
<input type="text" value="Randy"/>	<input type="text" value="R."/>	<input type="text"/>	<input type="text" value="Richards"/>	<input type="text"/>

Copy Current Name

Name Prior to First Marriage

First	Middle	Other Middle	Last	Suffix
<input type="text" value="Randy"/>	<input type="text" value="R."/>	<input type="text"/>	<input type="text" value="Richards"/>	<input type="text"/>

Birthplace

Birthplace State	Birthplace Country
<input type="text" value="Maine"/>	<input type="text" value="United States"/>

Date of Birth	Age	Sex
<input type="text" value="Mar-11-1985"/>	<input type="text" value="31"/>	<input type="text" value="Male"/>

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

- Click into the field that needs to be corrected. In this example, the Middle name field.
- Type in the correct Middle name.

Party A

Preferred Title
Groom

Current Name

First Middle Other Middle Last Suffix

Name Prior to First Marriage

First Middle Other Middle Last Suffix

Birthplace

Birthplace State Birthplace Country

Date of Birth Age Sex

10. Click the **Validate Page** button after making the correction. The **Validate Page** button will bring up any errors as a result of the change, if any, on the current registration page.

In the example above, clicking the **Validate Page** button did not bring up the Error Message frame because no other fields were affected by this change.

11. The **Item in Error Grid** will appear as shown below. The grid recaps the **Item as it Appears** and the **Item as it Should be**.

Page to Amend

Item In Error	Item as it Appears	Item as it Should be
Party A - Middle	R.	Robert
Party A - Middle	R.	Robert

Party A

Preferred Title

Current Name

First Middle Other Middle Last Suffix

[Copy Current Name](#)

Name Prior to First Marriage

First Middle Other Middle Last Suffix

Birthplace

 Birthplace State Birthplace Country

Date of Birth   Age Sex

Below is an example where the field **Number of this Marriage** was changed from 1 to 2. Selecting the **Validate Page** button caused an error message to appear. The change made resulted in another field (**Previous Marriage Ended By**) to be in error.

Page to Amend Marriage Party A Attributes

Item In Error	Item as it Appears	Item as it Should be
Party A - Middle	R.	Robert
Party A - Middle	R.	Robert
Party A Attributes - Number of this marriage	1	2

Party A Attributes

Social Security Number None Unknown

Number of this marriage

Previous Marriage Ended By Date last marriage ended (or date of death)

Error Message

MG0052: Previous Marriage Ended by cannot be left blank. Please enter Previous marriage ended by.

- Fix any errors that may pop up.
- If there are more changes required on the other registration pages, select the **Page to Amend** dropdown again and select the page that needs to be amended. Make the necessary changes. Then select the **Validate Page** button to check if there are any errors. Or, select the **Validate Amendment** button to validate all pages that have been changed.
- Once all changes have been made, select the **Save** button.
- The status of this amendment is **'Keyed'** as shown below.

308976 2016000035 :Randy R. Richards, Brenda B. Brewer Sep-12-2016
 /License Valid/Marriage Valid/Issued/Approved/Registered

Amendment Page

Type: VST - Before 90 Days Amendment Date: Sep-12-2016
 Year: 2016 Amendment Number: 21832
 Order Number: Description: Personal Affidavit
 Amendment Status: Keyed Microfilm Number:

Select Add Documentation to add documentary evidence to this amendment.

Add Documentary Evidence

Page to Amend:

Item In Error	Item as it Appears	Item as it Should be	Edit	Delete
Party A - Middle	R.	Robert	Edit	Delete
Party A - Middle	R.	Robert	Edit	Delete

Save Clear Return

Users can search which amendments have been keyed (but not yet approved) by going to the [Home page](#) > [Queues](#) > [Amendment Work Queues](#). From the [Queue](#) dropdown select “**Keyed**”. The page will open and list all the amendments that have been keyed, but not yet affirmed. Once the amendments have been affirmed, the amendment will drop out of the **Keyed** queue and into a **Pending** queue. After the amendment has been approved by the VitalRecords office, it will no longer show in the queue.

City of Augusta

Main Order Processing Life Events **Queues** Reports Forms Table Mair

Maine Department of Health and Human Services

Search by Amendment Work Queue

Queue: **Keyed**

Display 200 rows per page.

- Registration Work Queues
- Registration Work Queue Summary
- Order Work Queues
- Order Work Queue Summary
- Issuance Queues
- Issuance Queue Summary
- Amendment Work Queues**
- Amendment Work Queue Summary

From the [Amendment Menu](#), select the [Amendment Affirmation](#) link to affirm the changes made on the record.

308976 2016000035 :Randy R. Richards, Brenda B. Brewer Sep-12-2016
 /License Valid/Marriage Valid/Issued/Approved/Registered

Amendment Page

Type: VS7 - Before 90 Days Amendment Date: Sep-12-2016
 Year: 2016 Amendment Number: 21832
 Order Number:
 Amendment Status: Pending

Select Add Documentation to add documentary evidence

Add Documentary Evidence

Page to Amend:

Item In Error	Item as it Appears	Item as it Should be	Edit	Delete
Party A - Middle	R.	Robert	Edit	Delete
Party A - Middle	R.	Robert	Edit	Delete

Once the amendment is affirmed, the Amendment Status changes from 'Keyed' to 'Pending'.

The affirmation page will open. Place a checkmark in the affirmation checkbox, and select **Affirm**.

Affirmations

Affirm the following:

I certify that this change is being requested due to data entry error. (Note: all other types of errors require original documentation and cannot be submitted electronically.)

Affirm Clear Return

A checkmark will appear near the **Amendment Affirmation** link indicating the amendment has been affirmed.

Once an amendment has been affirmed, the amendment status will change from **Keyed** to **Pending** as shown above.

Amendments Menu

- Amendment
- Processing History
- Supporting Information
- Attachments
- Change History
- Amendment Affirmation
- Correspondence

To unaffirm an amendment, prior to approval, click on the **Amendment Affirmation** link and click the **Unaffirm Amendment** button. If the amendment has already been approved by the Vital Records office, the **Unaffirm Amendment** button will be disabled.

Amendments Menu

- Amendment
- Processing History
- Supporting Information
- Attachments
- Change History
- Amendment Affirmation**
- Correspondence

308976 2016000035 :Randy R. Richards, Brenda B. Brewer Sep-12-2016
 /License Valid/Marriage Valid/Issued/Approved/Registered

Affirmations

This amendment is currently affirmed.

Unaffirm Amendment Clear Return

Once an amendment has been approved by the Vital Records office, users in the same office will receive an internal message. An external email will be sent to the user who affirmed the amendment.

From	Message Text	Date Sent
Cecile Sprout	The amendment submitted for: 308976 ; Randy R. Richards;Brenda B. Brewer, Event Date: Sep-12-2016 has been Approved.	9/12/2016 1:57:19 PM

From: DAVE-no-reply@smtp.state.me.us
 To:
 Cc:
 Subject: Case 308976 Amendment Approved

Cecile Test

The amendment submitted for: 308976 ; Randy R. Richards;Brenda B. Brewer, Event Date: Sep-12-2016 has been Approved.

The Status Bar will show **Amendment Exists** if there is one amendment that has been approved on the record.

308976 2016000035 :Randy Robert Richards, Brenda B. Brewer Sep-12-2016 **Amendment Exists**
 /License Valid/Marriage Valid/Issued/Approved/Registered

Exercise 6.2 – Attaching Documents to an Amendment

Skill Learned: How to attach documentation related to an amendment.

Attaching a document to an amendment is very similar to attaching a document to a record which is described in Section 7.

From the **Amendment Menu** select the **Attachments** link.

Amendments Menu

- Amendment
- Processing History
- Supporting Information
- Attachments**
- Change History
- ✓ Amendment Affirmation
- Correspondence

308976 2016000035 :Randy Robert Richards,
/License Valid/Marriage Valid/Issued/Approved/Registered

Amendment Page

Type: VS7 - Before 90 Days
Year: 2016
Order Number:
Amendment Status: Complete

The **Attachments** popup appears. Click on the **New Attachment** button.

Attachments

Attachments

No data found.

New Attachment Close

The popup expands to display the **New Attachment** section. Click **Browse** to locate a file to attach.

Attachments

Attachments

No data found.

New Attachment

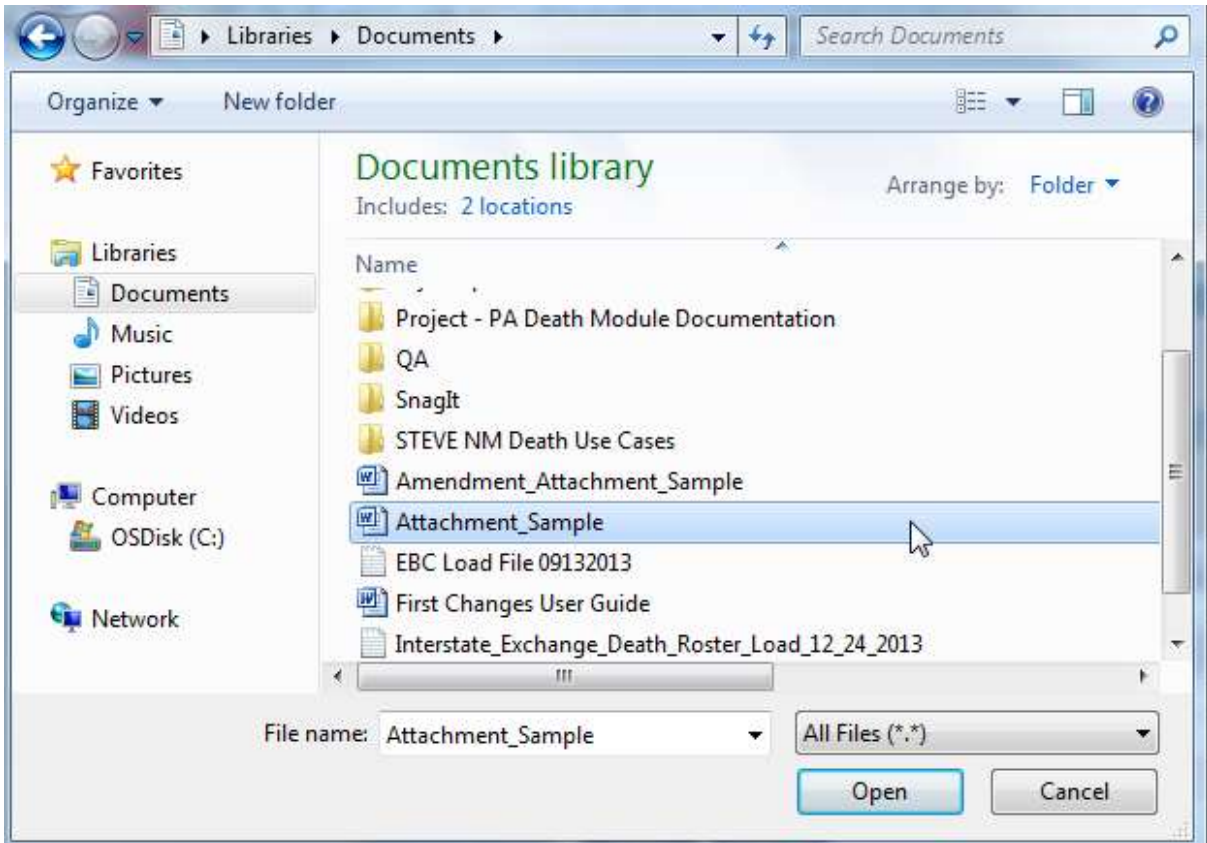
Attachment Type: Legal Record

Upload new attachment: Browse...

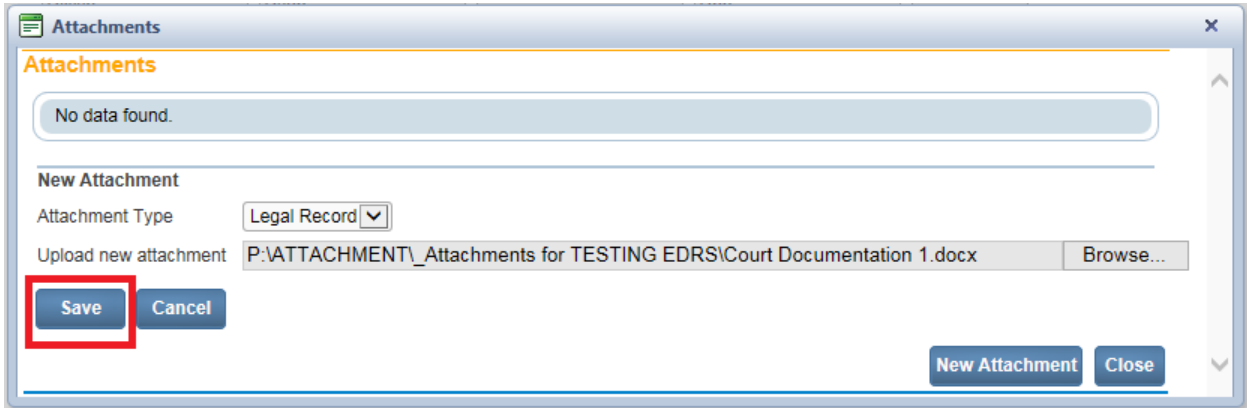
Save Cancel

New Attachment Close

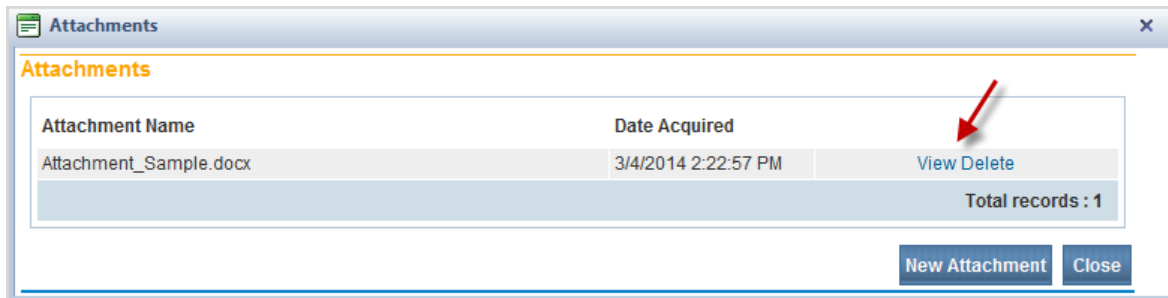
Locate the file in in the Windows Upload dialogue box and highlight. Double click on the file.



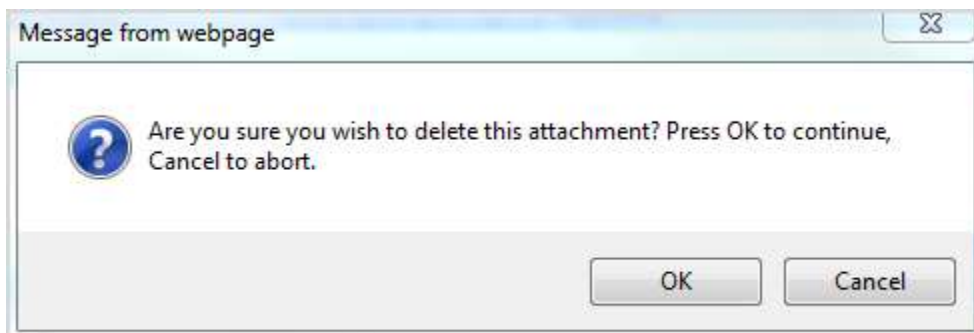
The selected file name and path appear in the **Upload new attachment** field. Click **Save**.



The **Attachments** popup displays the file. Links are available to **View or Delete** the attachment. Select **New Attachment** to add additional documents.



Selecting **Delete** prompts the following message: "Are you sure you wish to delete this attachment? Press OK to continue, Cancel to abort." Select **Cancel**.



Exercise 6.3 – Amendment List

Skill Learned: How to use the **Amendment List** to retrieve existing Amendments.

Note: Access to the Amendment List link is based on user security privileges.

1. From within an amended record, select **Registrar -> Amendment List**.

Marriage Registration Menu 308958 2016000031 :Rickie Ryan Roe, Tammy T. Toe Aug-23-2016 Amendment Exists
 License Valid/Marriage Valid/Issued/Approved/Registered

Party A

Preferred Title
 Groom

Current Name

First Middle Other Middle Last Suffix
 Rickie Ryan Other Middle Roe

Copy Current Name

Name Prior to First Marriage

First Middle Other Middle Last Suffix
 Rickie Ryan Other Middle Roe

Birthplace

Birthplace State Birthplace Country
 Maine United States

Date of Birth Age Sex
 Apr-02-1990 26 Male

Validate Page Next Clear Save Return

2. The **Amendment List** page will display a listing of all amendments associated with the current record. Notice that the **Amendment Id** and **Processing History** columns contain links to specific amendments. Click any of these links to view the amendment.

Amendment List

Amendment Id	Processing History	Amendment Type	Date Received	Date Completed / Rejected	Amendment Status	Order #
21830	History	Administrative Correction - Marriage	Aug-24-2016	8/24/2016 9:18:07 AM	Complete	

New Amendment Return

Amendment Page

Type Administrative Correction - Middle Amendment Date Aug-24-2016
Year 2016
Order Number
Amendment Status Complete

Clicking the Amendment ID will bring you to the Item in Error Grid.

Select Add Documentation to add documentary evidence to this amendment.

Add Documentary Evidence

Item In Error	Item as it Appears	Item as it Should be
Party A - Middle	R.	Ryan
Party A - Middle	R.	Ryan
Party B - Date of Birth	Jun-02-1990	Jun-02-1999
Party B - Age	26	17

Save Clear Return

Processing History

Previous Reference Number
Date Received Aug-24-2016 Date Mailed
Returned as undeliverable
Amendment Status Complete
Date Returned
Action
Facts Supported
Reject Reason
Other Reject Reason
Comment

Clicking the History link from the Amendment List page will bring up the Processing History page. Users can view the amendment status.

Status History

Start Date	End Date	Status	User	Comment
08/24/2016 09:18 AM		Amendment Approval Complete	Trainsup53	
08/24/2016 09:18 AM		Complete	Trainsup53	Approved by user
08/24/2016 07:42 AM	08/24/2016 09:18 AM	Keyed	Trainmccs1	
08/24/2016 07:42 AM	08/24/2016 09:18 AM	Amendment Approval Pending	Trainmccs1	

Clear Save Return

Section 7: Other Links

Exercise 7.1– Assign Status

A special status assigned to a record serves as an alert mechanism for the person viewing the record. The ability to view and/or edit a special status is based on security login privileges.

The special status functionality is primarily used to assign or remove one of the statuses referenced in the following table.

Note: Assign status is based on user security privileges. Municipal clerks will be allowed to place records on Hold. Records that need to be Voided (already registered), or Abandoned (not yet registered) can only be done by the Vital Statistics office.

Hold Status – Assigned to prevent the issuance of a certified copy.

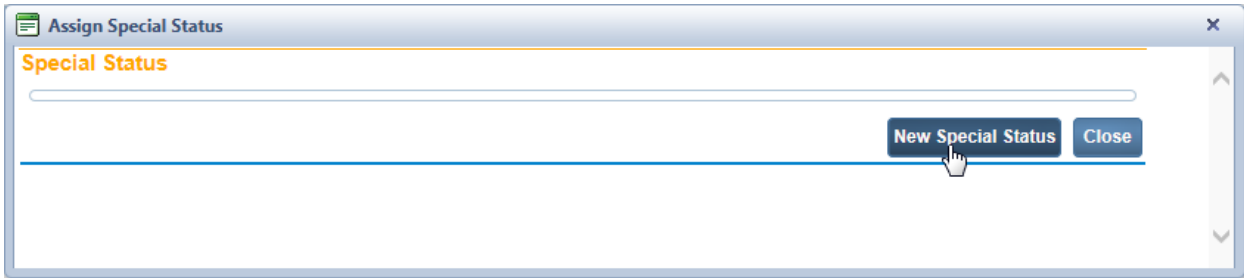
Void Status – Assigned when it is determined a (registered) record is a duplicate or invalid record. (Done at the State level.)

Abandoned Status – Assigned when it is determined an (unregistered) record is an orphaned record. (Done at the State level.)

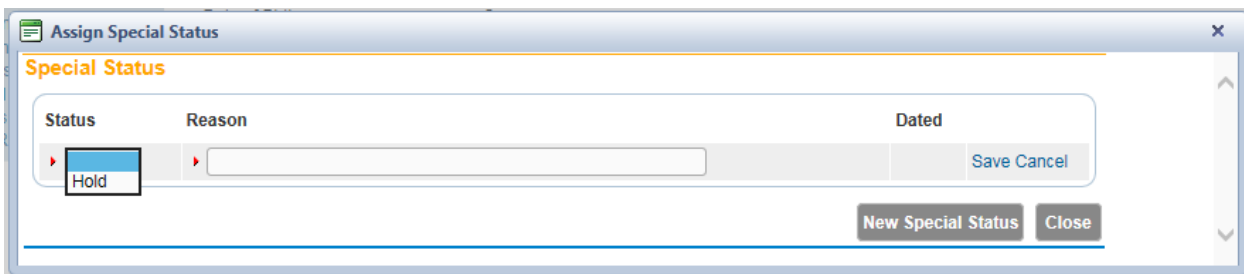
1. From the **Marriage Registration Menu**, select **Other Links > Assign Status**.



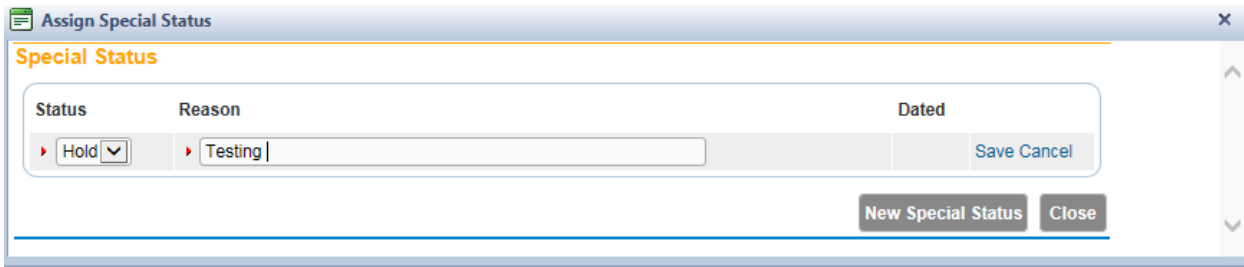
- In the **Assign Special Status** window select the **New Special Status** button.



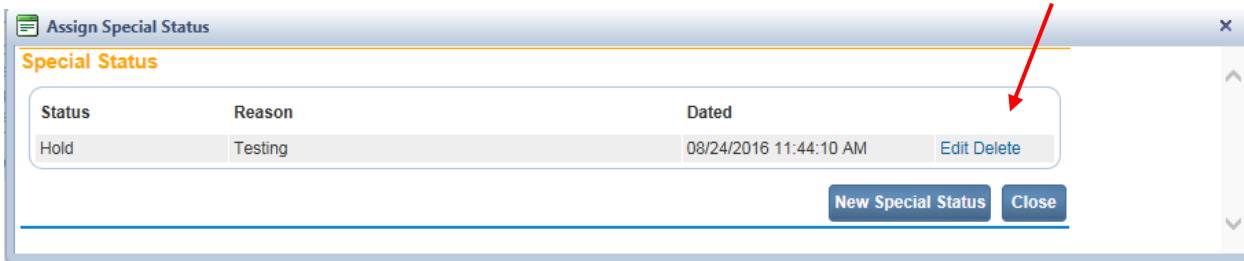
- Make a selection from the **Status** dropdown list.



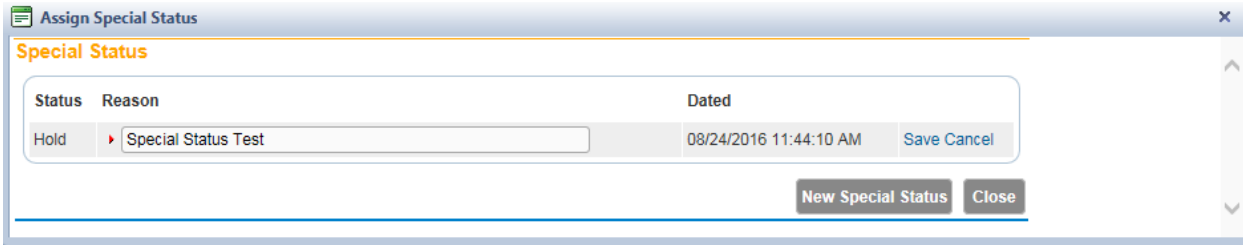
In this example, **Hold** status has been selected. Enter an explanation for the status request in the **Reason** field and choose **Save**.



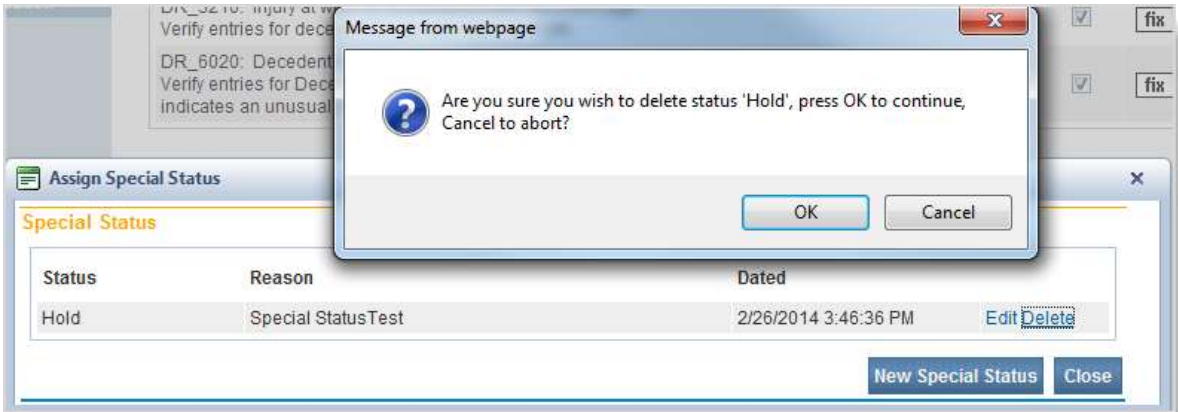
The status is assigned to the record. The **Save** and **Cancel** links are changed to **Edit** and **Delete**.



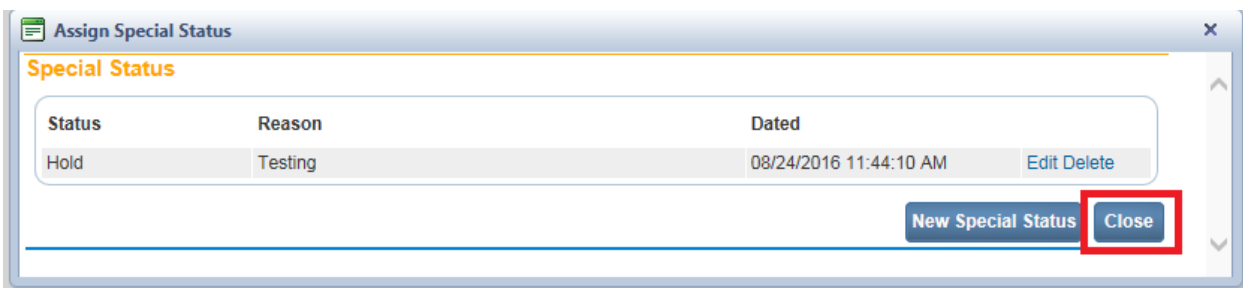
4. Select **Edit** to change the **Reason** associated with the **Status**. Change the Reason to “Special Status Test” and Select **Save**. To change/remove a status select the “**Delete**” link



A warning message will display. Selecting the **OK** button will remove the status from the record. For this exercise, select **Cancel**.



Select the **Close** button to return to the **Marriage Registration Menu**.



Upon assigning a special status to a case, it is viewable anywhere the status thread of a record appears such as the status bar of each registration page. A checkmark next to the **Assign Status** link in the Other Links section of the registration menu also serves as an indicator that a special status is assigned to a case.

Note: The “Issue this Record” link will no longer be visible when a record is in a “Hold” status. In addition, the “Issue” link in Order Processing will also be disabled.

308958 2016000031 :Rickie Ryan Roe, Tammy T. Toe Aug-23-2016 Amendment Exists
 /License Valid/Marriage Valid/Issued/Approved/Registered/Hold

Party A

Preferred Title
 Groom

Current Name
 First: Rickie Middle: Ryan Other Middle: Last: Roe Suffix:

Copy Current Name

Name Prior to First Marriage
 First: Rickie Middle: Ryan Other Middle: Last: Roe Suffix:

Birthplace
 Birthplace State: Birthplace Country: United States

Date of Birth: Apr-02-1990 Age: 26 Sex: Male

Validate Page Next Clear Save Return

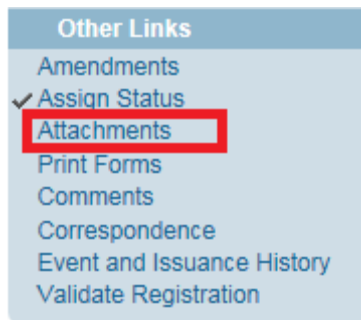
Exercise 7.2– Attachments to a Record

There are occasions when vital records personnel need to associate attachments to a vital records event registration. With paper-based registrations, this is accomplished “manually” by placing a copy of the attachment in a file. In DAVE™, this is accomplished by scanning the attachment and storing the scanned image in a database.

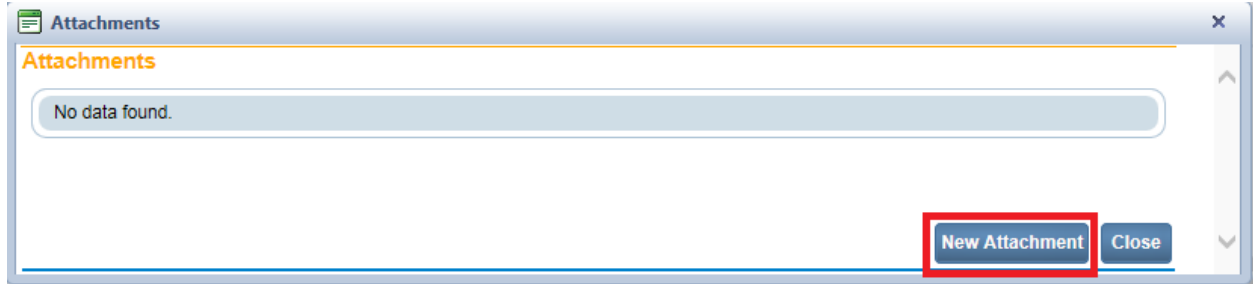
Attachments can include everything from copies of identification cards, government-issued licenses, social security cards, or marriage licenses, to letters sent to authorities, hand-written letters, notes, or even pictures. In each case, these have to be converted into electronic form in order to be uploaded to DAVE™.

Only users with appropriate security privileges are able to view, edit, and/or delete attachments by accessing the Attachments link and selecting the View or Delete links.

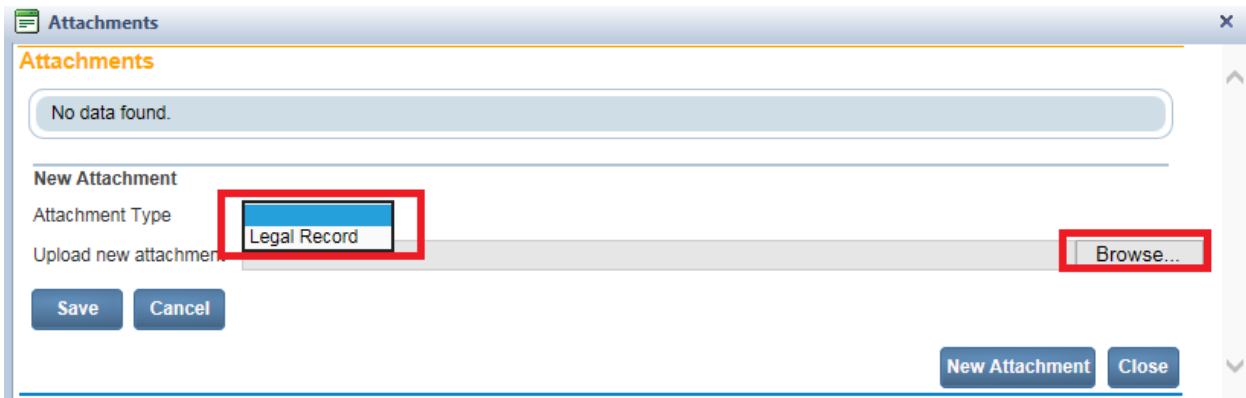
1. From the **Other Links** sub-menu, select **Attachments**.



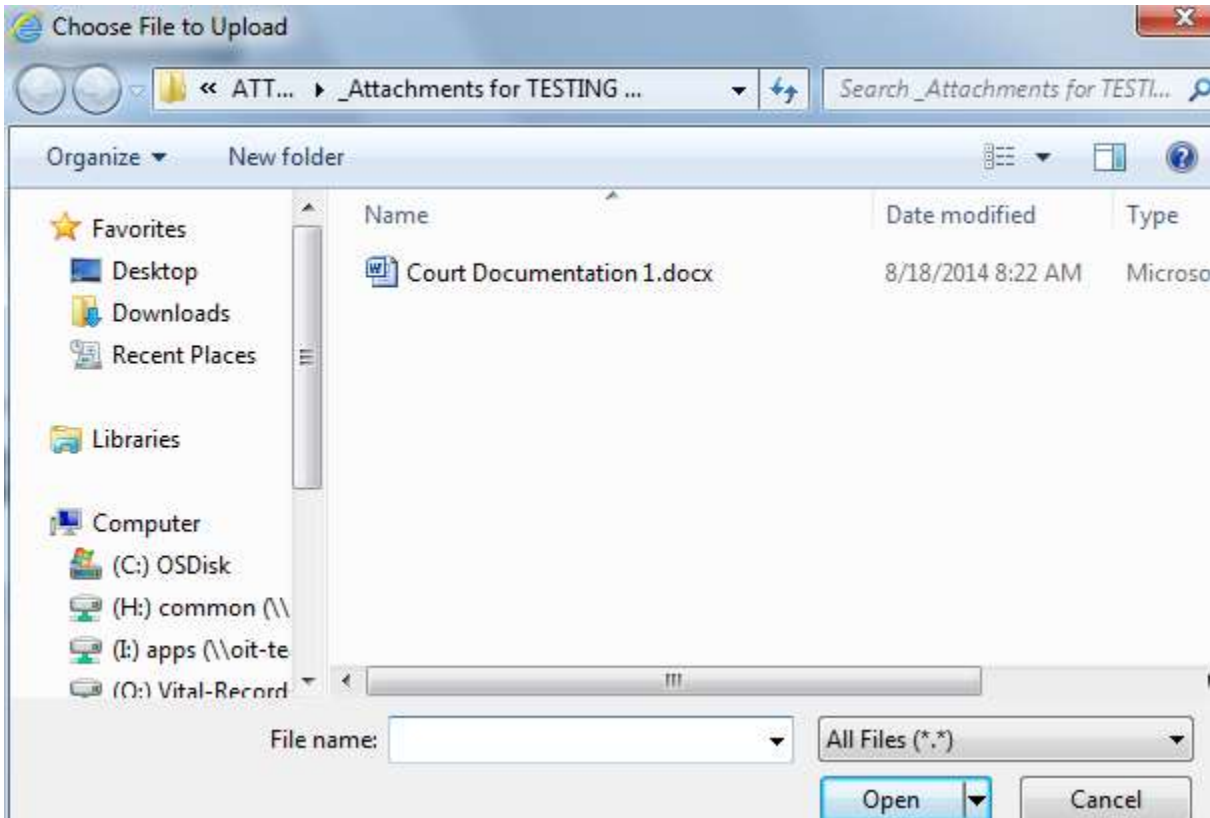
2. The **Attachments** popup appears. Click on the **New Attachment** button.



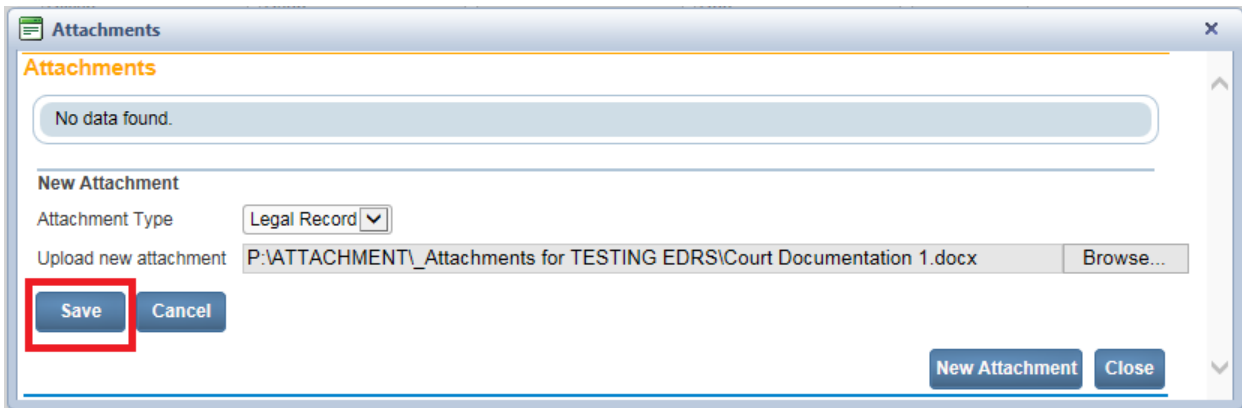
3. The popup expands to display the **New Attachment** section.
4. Select "Legal Record" from the Attachment Type dropdown.



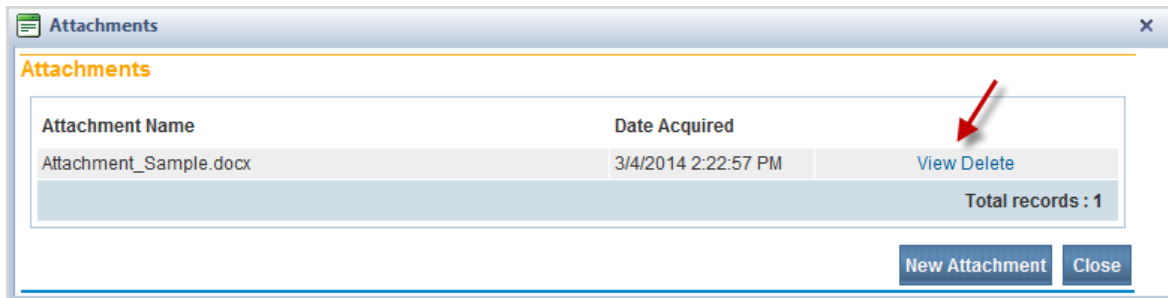
5. Click **Browse** to locate a file to attach. Locate the file in the Windows Upload dialogue box and highlight. Click **Open**.



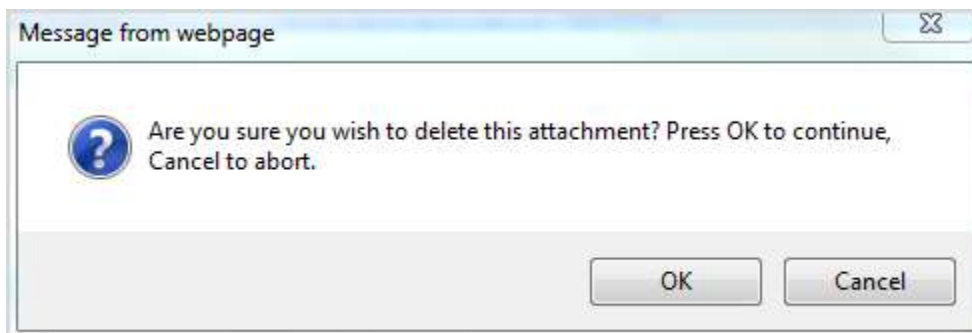
6. The selected file name and path appear in the **Upload new attachment** field. Click **Save**.



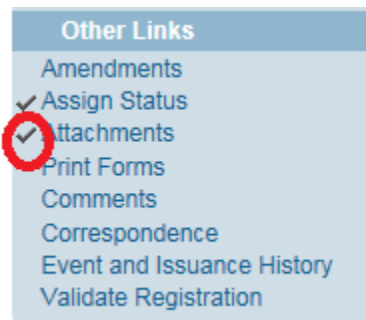
7. The **Attachments** popup displays the file. Links are available to **View or Delete** the attachment. Select **New Attachment** to add additional documents.



8. Selecting **Delete** prompts the following message: “Are you sure you wish to delete this attachment? Press OK to continue, Cancel to abort.” Select **Cancel**.



9. Select **Close** to close the **Attachments** popup. A checkmark appears on the **Other Links** menu indicating an Attachment exists.



Exercise 7.3– Print Forms – License Working Copy

Skill Learned: How to print a **Working Copy** of the marriage license from the **Print Forms** menu.

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 **Marriage Registration Menu**, select **Other Links -> Print Forms**.



- From the **Print Forms** page, select **License Working Copy**.

Print Forms

[License Working Copy](#)

[Marriage Certificate Working Copy](#)

[Return](#)

- Selecting any document from the **Print Forms** page will launch the **File Download** window, shown below. Select the **Open** button.



- The **License Working Copy** form will load. The form can be printed as normal by sending the PDF file to any local or network printer. The **License Working Copy** contains a watermark across the page and cannot be used as a legal document.

Exercise 7.4 – Print Forms – Marriage Certificate Working Copy

Skill Learned: How to print a Marriage Certificate Working Copy.

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

1. Select **Marriage Registration Menu -> Other Links ->Print Forms.**



2. Locate the underlined [Working Copy](#) link.

Print Forms

[License Working Copy](#)

[Marriage Certificate Working Copy](#)

Return

3. Clicking any form link will open the **File Download** dialog box and launch the document for printing.

Do you want to open or save **LicenseWorkingCopy.pdf** (34.8 KB) from [gatewaytest.state.me.us](#)?

Open

Save

Cancel

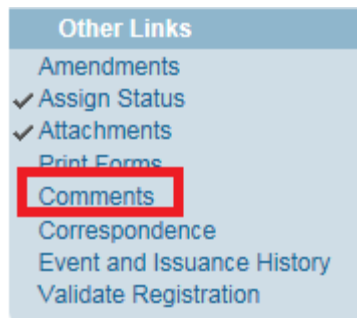
×

-
- The **Marriage Certificate Working Copy** form will load. The form can be printed as normal by sending the PDF file to any local or network printer. The **Marriage Certificate Working Copy** contains a watermark and printed at the bottom is <<<Not a Legal Document>>>.

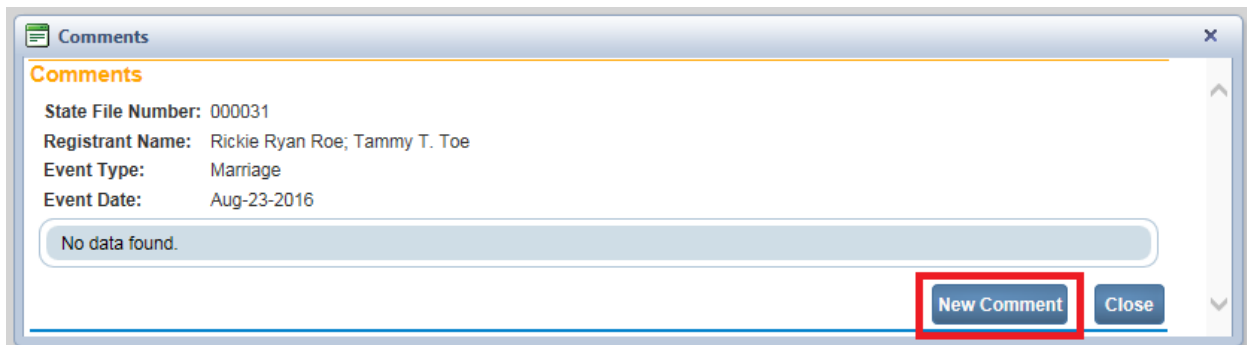
Exercise 7.5 – Comments

Skill Learned: How to read and enter comments. During the process of entering and registering marriage 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.

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



- 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.



- The **Enter New Comment** tab will open allowing you to enter new comments.

Comments

State File Number: 000031
 Registrant Name: Rickie Ryan Roe; Tammy T. Toe
 Event Type: Marriage
 Event Date: Aug-23-2016

No data found.

Enter New Comment

Comment Type:

Comment:

Maximum text length: 4000 Characters left: 4000

Save
 Clear
 Cancel

New Comment Close

- The first step in adding a new comment is to select a **Comment Type**. Every comment must have a type assigned to it. Comment type is based on user security privileges.

Enter New Comment

Comment Type:

Comment:

Maximum text length: 4000 Characters left: 4000

Save
 Clear
 Cancel

New Comment Close

- Comments are limited to 4000 characters. Fortunately, **DAVE™** keeps track of the number of characters used and displays that information onscreen.

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

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

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** will write the comment to the **DAVE™** database and return you to the main **Comments** window, shown below. Notice that the entire comment cannot be read in the **Comments** window. However, if you hover over the comment, you will be able to see the entire comment in a popup preview window. Clicking the [Edit](#) link will open the **Update Existing Comment** tab for you to view and, if necessary, edit the comment. The [Delete](#) link is security controlled and will be disabled.

8. 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 comments exist on a record.

Marriage Registration Menu

- License
- Party A
 - Party A Parents
 - Party A Other Information
 - Party A Attributes
- Party B
 - Party B Parents
 - Party B Other Information
 - Party B Attributes
- Local Official
- Marriage
 - Officiant
 - Filing Official
- Registrar
- Amendment List
- Other Links
 - Amendments
 - ✓ Assign Status
 - ✓ Attachments
 - Print Forms
 - ✓ **Comments**
 - Correspondence
 - Event and Issuance History
 - Validate Registration

308958 2016000031 :Rickie Ryan Roe, Tammy T. Toe Aug-23-2016 Amendment Exists
License Valid/Marriage Valid/Issued/Approved/Registered/Hold

Party A

Preferred Title
Groom

Current Name
First Middle Other Middle Last Suffix
Rickie Ryan Roe

Copy Current Name

Name Prior to First Marriage
First Middle Other Middle Last Suffix
Rickie Ryan Roe

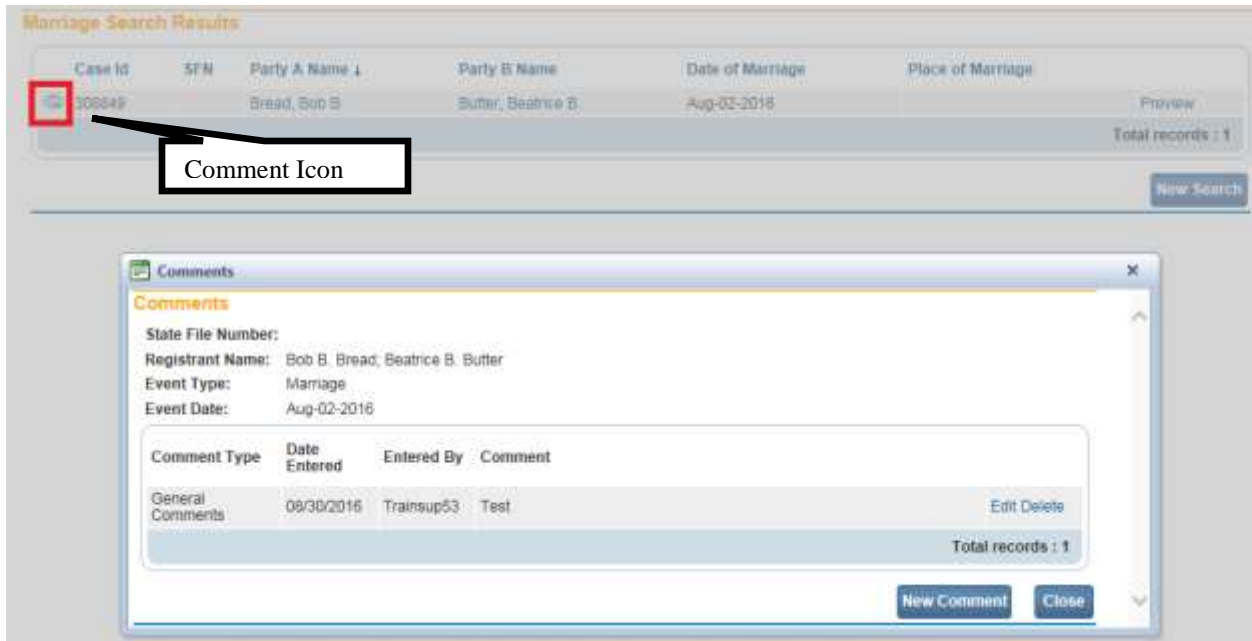
Birthplace
Birthplace State Birthplace Country
Maine United States

Date of Birth Age Sex
Apr-02-1990 26 Male

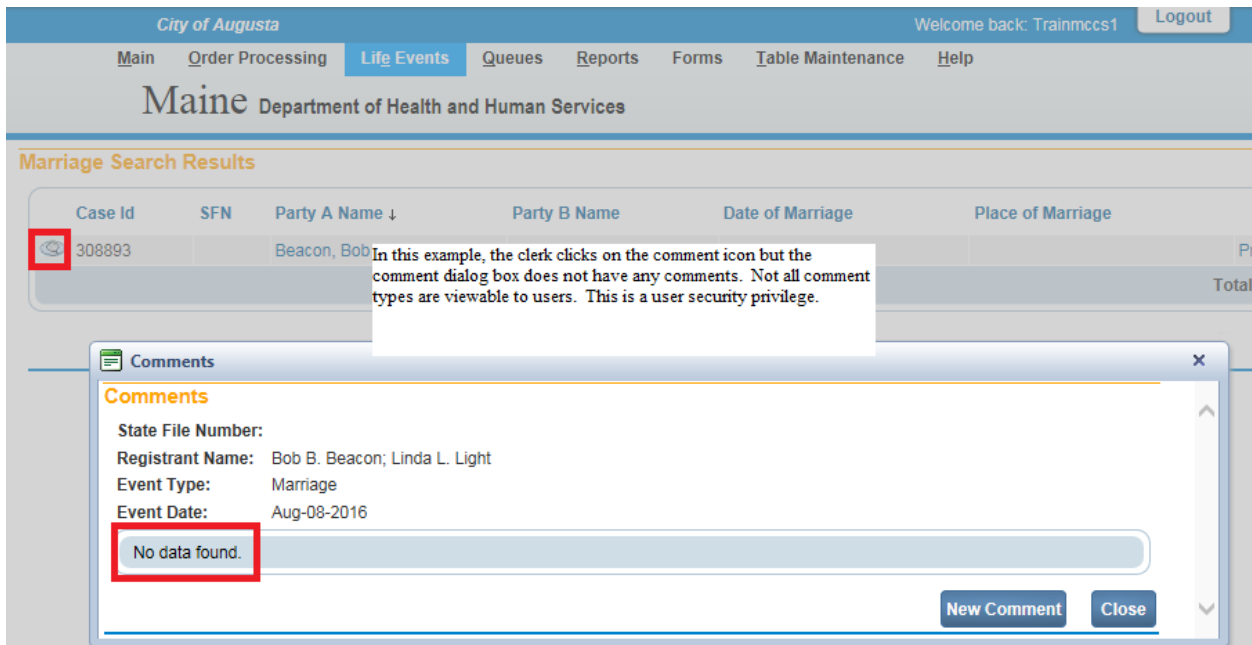
Validate Page Next Clear Save Return

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

Comment Icon – Whenever a comment has been added to a record, a **Comment Icon** will appear next to the case id on the Marriage Search Results page and also the search result pages under Work Queues. To view the comment, click on the comment icon to open the comment.



Note: Access to comment types are based on user security privileges.



Section 8: Work Queues

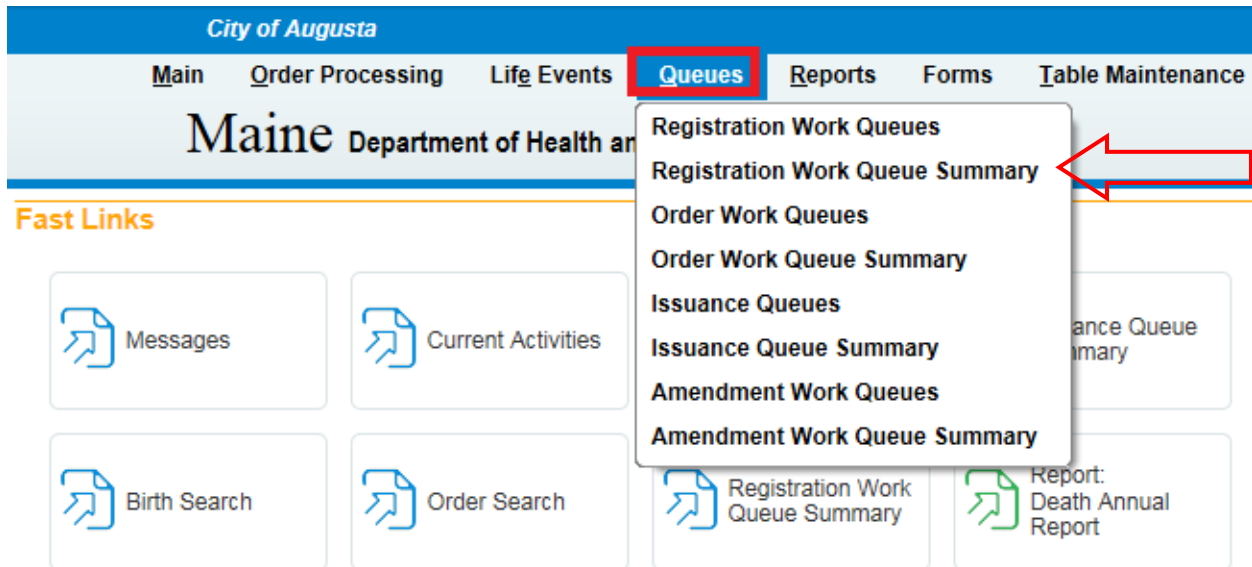
In this section, you will learn how to navigate through the various **DAVE™** work queues. Queues are used to manage work flow by grouping records that require similar actions or work

into queues. This grouping is accomplished through the assignment of work queue statuses based on validation rule failures.

Exercise 8.1 – Work Queue Summary

Skill Learned: How to access records via work queues. As registrations work their way through **DAVE™**, they will pass from one work queue to another. **Queues** represent the statuses assigned to records in **DAVE™**.

1. From the **Home Page**, hover over **Queues**. This will show a menu of all the available work queues. **Queues** contain registrations, orders, or amendments having a work queue status.



2. Select the **Registration Work Queue Summary** menu link. The summary page displays a list of all Registration queues containing cases. If a queue does not contain any cases it will not be displayed in the list. The default sort order is by **Type** denoted by an arrow. Notice however, that the column headers in the summary table are all underlined links. Clicking any of these links will change the sort order of the table based on that column's content.

Registration Work Queue Summary

<u>Queue Name</u>	<u>Type ↑</u>	<u>Count</u>	<u>Age of Oldest in Days</u>
Marriage Potential Duplicate	Marriage	6	63
Marriage Pending	Marriage	23	66
Marriage Info Rejected	Marriage	1	20
License Pending	Marriage	13	66
License Info Rejected	Marriage	1	20
License Approval Required	Marriage	1	16
Filing Approval Required Work Queue	Marriage	7	58
Hold	Death	3	73
			Total Queues : 8

3. Selecting **Queue Name** will sort by the name of the queue.
4. Selecting **Count** (number of cases in the queue) will sort the queues in ascending order based on the number of cases in the queue. Selecting **Count** again will resort the queues in descending order.

5. Selecting **Age of Oldest in Days** will sort the queues based on the oldest case in the queue.
6. Click any link in the **Queue Name** to view a list of the items currently found in that particular queue. In the example shown here there are 23 cases in the **Marriage Pending** queue. Click the [Marriage Pending](#) link to open the queue.

Registration Work Queue Summary

Queue Name	Type ↑	Count	Age of Oldest in Days
Marriage Potential Duplicate	Marriage	6	63
Marriage Pending	Marriage	23	66
Marriage Info Rejected	Marriage	1	20
License Pending	Marriage	13	66
License Info Rejected	Marriage	1	20
License Approval Required	Marriage	1	16
Filing Approval Required Work Queue	Marriage	7	58
Hold	Death	3	73
Total Queues : 8			

7. Click any [Registrant](#) name or [Case Id](#) link to open that case for review or editing.

Search by Registration Work Queue

Queue: [Marriage Pending - Marriage](#) Search Type: Value: Filter: Search Show All Rows Clear Return

Display 200 rows per page

All	Case Id	File Number	Registrant	Date of Event ↑	Data Provider
<input type="checkbox"/>	308949		Drummin, Donald ; Piper, Lisa	Aug-18-2016	City of Augusta
<input type="checkbox"/>	308947		Waffle, John ; Toast, Tina	Aug-18-2016	City of Augusta
<input type="checkbox"/>	308944		Renee, Robert ; Dodge, Debbie	Aug-18-2016	City of Augusta
<input type="checkbox"/>	308942		Seal, Scott S. ; Saylor, Susan S	Aug-18-2016	City of Augusta

Note: A case can be in more than one work queue. As shown in the status bar below, this case would be found in the License Pending, Marriage Pending, and Marriage Potential Duplicate queue.

City of Augusta | Welcome back: Trainmcs1 | Logout

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

Maine Department of Health and Human Services

Marriage Registration Menu | 308947 : John Waffle, Tina Toast Aug-18-2016

License Invalid/Marriage Invalid/Not Issued/Not Approved/Not Registered/License Pending | **Marriage Pending** | Marriage Potential Duplicate

Party A

Preferred Title: [Dropdown]

Current Name

First: John | Middle: | Other Middle: |

Copy Current Name

Party A Parents
Party A Other Information
Party A Attributes
Party B
Party B Parents
Party B Other Information
Party B Attributes
Local Official
Marriage

This case is not only in the Marriage Pending Queue, but in the Marriage Potential Duplicate queue and the License Pending queue.

- From the registration page, select the **Return** button to return to the queue. Typically, at this point the next case in the queue would be selected for review and update.

Exercise 8.2 – Work Queues - Filters

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

- Open the **Search by Amendment Work Queue** as shown below and select any of the available filters from the **Filter** dropdown list.

Search by Amendment Work Queue

Queue: Keyed | Search Type: [Dropdown] | Value: [Text Box]

Display: 200 rows per page | **Filter:** [Dropdown]

Search | Show All Rows | Clear

All	Amendment Number	Amendment Type	Date Received	Priority	Event Type	Registrant	File Number	Date of Event
<input type="checkbox"/>	21805	Administrative Correction - Marriage	08/05/2016		Marriage	Baltimore, Benjamin B.	2016000023	08/05/2016

Total records : 1

Actions: Add Comments Correspondence | Print Queue List

- Upon selection of a filter, the **Value** dropdown list will be displayed. Make a selection from the **Value** dropdown list and click **Search**.

Search by Amendment Work Queue

Queue: Search Type: Value:

Display: rows per page. Filter: Value:

Once a filter is selected, the Value dropdown will display.

All	Amendment Number	Amendment Type	Event Type	Registrant	File Number	Date of Event
<input type="checkbox"/>	21895	Administrative Cor	Marriage	Baltimore, Benjamin B.	2016000023	08/05/2016

Total records : 1

3. The results of this filtered search are displayed below.

Search by Amendment Work Queue

Queue: Search Type: Value:

Display: rows per page. Filter: Value:

Search Show All Rows Clear

All	Amendment Number	Amendment Type	Date Received	Priority	Event Type	Registrant	File Number	Date of Event
<input type="checkbox"/>	21619	Administrative Correction - Marriage	08/10/2016		Marriage	Malloy, Christopher C.	2016000028	08/10/2016
<input type="checkbox"/>	21737	Administrative Correction - Marriage	06/27/2016		Marriage	Heinz, Henry H.	2016000004	06/27/2016
<input type="checkbox"/>	21715	Administrative Correction - Marriage	06/14/2016		Marriage	Darling, David Donald	2016000001	06/14/2016

Total records : 3

Exercise 8.3 – Work Queue and Work Queue Summary

The Work Queues and Work Queue Summary contain the same files and information. Selecting one over the other is a matter of preference.

Queues Reports Forms Tat

- Registration Work Queues
- Registration Work Queue Summary
- Order Work Queues
- Order Work Queue Summary
- Issuance Queues
- Issuance Queue Summary
- Amendment Work Queues
- Amendment Work Queue Summary

Selecting one of the “Work Queues” brings up a Queue dropdown. Once a queue is selected a list of cases applicable to that Queue will appear.

Search by Registration **Work Queue**

Queue: License Pending - Marriage Search Type: Value:

Display 200 rows per page. Filter:

Search Show All Rows Clear

All	Case Id	File Number	Registrant	Date of Event ↑	Data Provider
<input type="checkbox"/>	308952		Carnes, Bob B. ; Glory, Ann A.	Oct-12-2016	City of Augusta

Selecting one of the “Work Queue Summary” brings up a recap of all the queues. Selecting a queue would then bring you to the list of cases for that queue.

Registration **Work Queue Summary**

Queue Name	Type ↓	Count	Age of Oldest in Days
Hold	Death	3	73
Filing Approval Required Work Queue	Marriage	7	58
License Approval Required	Marriage	1	16
License Info Rejected	Marriage	1	20
License Pending	Marriage	13	66
Marriage Info Rejected	Marriage	1	20
Marriage Pending	Marriage	23	66
Marriage Potential Duplicate	Marriage	6	63
Total Queues : 8			

Section 9: Order Processing

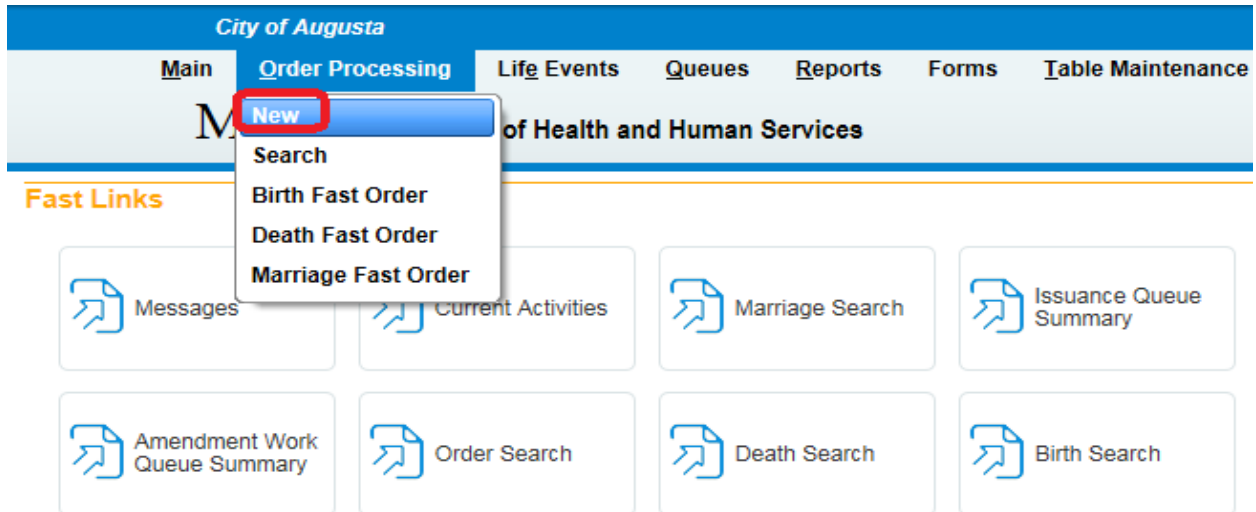
Exercise 9.1 – Applicant Page

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

Before starting an order:


- Check in **DAVE™** to insure that the case is registered and that one or both parties was either a resident of your municipality or the place of marriage occurred in your municipality. If neither applies, then you will not be able to issue the license and/or certificate.
- Safety Paper numbers that will be used for the order have been added into **DAVE™**. See Section 11 on how to add safety paper into **DAVE™**.

1. From the **Home Page** select **Order Processing -> New**.



The **Applicant** page will appear 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.

- There are two radio buttons at the top of the **Applicant** page; **Person** and **Organization**.

- Select the **Organization** radio button and notice that the **Name** tab is replaced by an **Organization** tab, as shown below. If the **Applicant** is an **Organization**, use the **Lookup** control () to complete this page (see [Using Lookup Controls](#) – Section 2).

Applicant

Applicant: Person Organization ID Type: Other: Expedite Order

Organization

Name:

- Re-select the **Person** radio button to view the **Name** tab and complete the following fields: **First**, **Middle**, and **Last** name.

Applicant

Applicant: Person Organization ID Type: Other: Expedite Order

Name

Prefix: First: Middle: Last: Suffix: Fraud Suspect?

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:

Shipping Information Same as Applicant?

- Next, enter all the applicable text entries for the **Address** tab. This address will be used for mailing/delivery of the service requested.

Note: Use the directional dropdown lists for addresses. Do not type directional text in the Street Name fields.

- Enter any applicable information into the **Contact Information** fields. While these fields are not mandatory, providing this information will make it easier to contact the customer if follow up is needed.
- The default setting of the **Shipping Information Same as Applicant** checkbox assumes that the applicant and the recipient of a registered certificate are the same person. If the applicant and the recipient are not the same person, then de-select the checkbox and a new **Shipping Information** tab will display. Using the same techniques described above, complete the **Shipping Information** tab with the recipient's name and address.

Shipping Information Same as Applicant

Shipping Information

Name

Prefix First Middle Last Suffix

Address

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

City or Town State Country Zip Code

United States

Contact Information

Attention:

Phone Number: - Alternate Number: - Fax Number: -

Email:


De-selecting the Shipping Information checkbox will display the Shipping Information tab.

8. Re-select the **Shipping Information Same as Applicant** tab to close the **Shipping Information** tab.
9. Complete the **Applicant Name** and **Address** fields and click the **Next** button to proceed to the **Match Events** page.

Exercise 9.2 – Match Events Page

Skill Learned: How to complete the **Match Events** page and continue entering a new order. The purpose of the **Match Events** page is to locate a specific registration and determine applicant eligibility to receive a certified copy.

Previously, we completed the **Applicant** page and selected **Next**. Notice that the page refreshes and that the menu on the left changes. (See image below.) The **Home Page** collapses and the **Order Processing Menu** expands. As you continue to complete pages and click each pages **Next** button you will automatically progress downwards through the **Order Processing Menu**.

There are 3 steps to completing the **Match Events** page. Each step will open up a new window on the **Match Events** page. There are three tabs displayed in the image below: **Events Requested**, **Eligibility**, and **Event Search**. The **Event Search** tab uses a new feature, the **Instructions** icon ().

Match Events

Events Requested

Eligibility

Event Type: Marriage
Applicant Relationship: Other Specify:

Event Search

File Number: Year: Number:
Party A First: Middle: Last:
Party B First: Middle: Last:
Date of Marriage Start: End:
Place of Event City: Place of Event County:
Number of rows to be returned:

- Initially, the **Events Requested** tab is empty. This tab will be populated later. Locate the **Eligibility** tab and change the **Event Type** to Marriage.

Eligibility

Event Type: Marriage

- Select the **Applicant Relationship's** to Party A or Party B from the **Applicant Relationship** dropdown list. If the applicant's relationship to the Party A or Party B is not included in the list, select **Other Specify** and then manually complete the **Other Specify** field. In this example, applicant is Registrant/Self.

Eligibility

Event Type: Marriage
Applicant Relationship: Registrant/Self Other Specify:

- In the **Event Search** tab you will enter the search criteria to be used to find the desired marriage record. Allow the onscreen cursor to hover over the **Instructions** icon () for more information about this page:

Event Search

File Number:
Party A First: Middle: Last:

1. Enter all event request information provided.
2. Deselect the checkbox next to any item that should NOT be included in the search.
3. Select Search or Soundex.

Note: The Instructions icon () indicates that onscreen instructions or information are available for that user interface element. Allow the cursor to hover over the () icon and the instructions or information will appear onscreen.

4. In the example below, we are searching for a marriage registration based on **Party A First** and **Last** name.

Match Events

Events Requested

Eligibility

Event Type:

Applicant Relationship:

Event Search

File Number: Year: Number:

Party A First: Middle: Last:

Party B First: Middle: Last:

Date of Marriage Start: End:

Place of Event City: Place of Event County:

Number of rows to be returned:

Note: If there is no data in fields that are checked, DAVE™ will only search on those fields that are both checked and contain data.

Event Search

The amount of information entered in the **Event Search** tab is dependent upon jurisdiction business rules. **DAVE™** does not require all search elements to be entered when searching for a record, but providing more information will help limit the number of records returned.

The **Event Search** section provides checkboxes next to each field, to indicate which fields should be included in the search. **DAVE™** will only look for matches on those elements that have been checked. For example, if you include an entry in the **Party A First** field, but do not check the box next to the field, **First** name will not be included in the search criteria.

The **Event Search** tab also serves to preserve the information provided by the applicant. Applications often contain inaccurate or missing information; therefore, **DAVE™** provides a means to select and record the items that were used as search criteria.

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

The **Event Search** section provides the ability to search for an event by **Year** of event and file **Number**. If the **Search** button is selected and only **Year** or only file **Number** is entered, **DAVE™** will display the following error message: "Invalid Search Criteria. Both Year and SFN are required."

If the **Search** button is selected and the **File Number** and **Year** are both empty and all other fields are empty, **DAVE™** will display the following error message: "Invalid Search Criteria. Last Name is required."

- Upon entry of all available search criteria, click the **Search** button to perform a search and retrieve a list of potentially matching records, as shown below.

Select Matching Event

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"/> Preview	Aug-23-2016	2016000031	Roe, Rickie Ryan; Toe, Tammy T.	Augusta, Kennebec
Total records : 1				

Save Match

Preview

Case Id: 308958
 File Number: 2016000031 Date Filed: Aug-24-2016
 Party A Name: Rickie Ryan Roe Party A Birthplace: Maine Party A Date of Birth: Apr-02-1990
 Party B Name: Tammy T. Toe Party B Birthplace: Maine Party B Date of Birth: Jun-02-1999
 Place of Marriage: Augusta, Kennebec Date of Marriage: Aug-23-2016
 Date Entered: AUG-23-2016 Last Updated By: Cecile Sprout
 Status: /License Valid/Marriage Valid/Issued/Approved/Registered/Hold

- When the **Select Matching Event** window displays, the first record returned in the list is automatically selected and the details of the pre-selected record are displayed in the **Preview** window shown above.
- Another option is to perform a **Soundex** search. **Soundex** is useful when you are unsure of the spelling of the applicant or registrant's name.
- Once you have verified that you have found the correct record, click the **Save Match** button.

Select Matching Event

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"/> Preview	Aug-23-2016	2016000031	Roe, Rickie Ryan; Toe, Tammy T.	Augusta, Kennebec
Total records : 1				

Save Match

- Return to the top of the **Match Events** page and notice that the **Events Requested** tab now displays the saved match.

Match Events

Events Requested

Id	First	Middle	Last	Event Type		
1	Rickie	Ryan	Roe	Marriage	Save	Cancel Preview

10. Notice also the **New Event** button located at the bottom of the **Match Events** page.

Match Events

Events Requested

Id	First	Middle	Last	Event Type		
1	Rickie	Ryan	Roe	Marriage	Edit	Preview

Eligibility

Event Type:

Applicant Relationship: Other Specify:

Event Search

File Number: Year: Number:
Party A First: Middle: Last:
Party B First: Middle: Last:
Date of Marriage Start: End:
Place of Event City: Place of Event County:
Number of rows to be returned:

11. If the order is for more than one marriage, Clicking **New Event** clears all onscreen entries and allows the user to conduct a new search for the next certificate request. This feature allows for the inclusion of multiple events and/or registrants in a single order. **DAVE™** continues to display any previous search results in the **Events Requested** tab.
12. Select the **Next** button at the bottom of the **Match Events** window to proceed to the **Services** page. Selecting the **Previous** button will return to the **Applicant** page; selecting **Return** will return you to the **Home Page**.

Exercise 9.3 – Services Page

Skill Learned: How to select the proper service(s) to associate with an order. **Services** represent the documentation or certified copy requested by a customer.

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

Order Processing Menu

20160800245 :Rickie Ryan Roe
 /Order Invalid/Incomplete/Registration On Hold

Services

Source Received Date Fee Effective Date

Will this order be paid for by Credit Card?

1 Name: Rickie Ryan Roe

Applicant Relationship to Registrant: Registrant/Self
 Currently there are no services for this event request. Please click Add Service to add a service.

[Add Service](#)

[Save](#) [Previous](#) [Next](#) [Return](#)

2. **Received Date** and **Fee Effective Date** are pre-filled with the current system date. **Fee Effective Date** is used to determine the date on which the fees are to be applied. This date can only be changed by the System Administrator. Click the **Add Service** button to proceed.

Order Processing Menu

20160800245 :Rickie Ryan Roe
 /Order Invalid/Incomplete/Registration On Hold

Services

Source Received Date Fee Effective Date

Will this order be paid for by Credit Card?

1 Name: Rickie Ryan Roe

Applicant Relationship to Registrant: Registrant/Self
 Currently there are no services for this event request. Please click Add Service to add a service.

[Add Service](#)


[Save](#) [Previous](#) [Next](#) [Return](#)

3. Clicking the **Add Service** button above will refresh the page and display the **Name** tab, as highlighted below. Notice that certain fields are marked with red arrows (→). Fields marked with red arrows are required entries that must be completed before you will be allowed to proceed.

For the purposes of this exercise, make the following selections:

- Set **Source** to **Walk In**
- Select **Marriage Certified Copy** from the **Service** dropdown list
- Set **Quantity** equal to 1
- Select **Regular** from the **Priority** dropdown list
- Select **Counter** from the **Delivery** dropdown list
- Select **Personal Records/Use** from the **Request Reason** dropdown list
- Click the **Save** button to proceed

Services

Source ▾ Walk in ▾ Received Date Aug-25-2016  Fee Effective Date Aug-25-2016 

Will this order be paid for by Credit Card?



1 Name: Rickie Ryan Roe

Applicant Relationship to Registrant: Registrant/Self

▸ Service	▸ Quantity	▸ Priority	▸ Delivery
Marriage Certified Copy ▾	1	REGULAR ▾	Counter ▾
Request Reason	Other Specify		
Personal Records/Use ▾			
			Save Cancel
Add Service			
Save Previous Next Return			

4. Notice that the **Name** tab now displays the selected **Service(s)** including any associated fees.

Services

Source ▾ Walk in ▾ Received Date Aug-25-2016  Fee Effective Date Aug-25-2016 

Will this order be paid for by Credit Card?

1 Name: Rickie Ryan Roe

Applicant Relationship to Registrant: Registrant/Self

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	
1	Marriage Certified Copy	1	REGULAR	Counter	Personal Records/Use		\$15.00	Edit Reverse

Add Service

Save Previous Next Return

5. If any errors are found in this service request, click the **Edit** link to make any necessary changes. The **Reverse** link is used to remove a service if it is determined that a different service is needed. For example, if the initial request was a mail request for a Marriage Certified Copy and it was determined that a Veteran Copy was needed instead, selection of the **Reverse** link will insert a negative row and allow a new service to be added.
6. More than one service can be requested per record. If additional services are desired, click the **Add Service** button and repeat the steps above. If not, click the **Next** button to continue.
7. At this point, all of the navigation buttons at the bottom of the **Services** page should be enabled. Click the **Next** button to proceed with order placement and enter **Payments**.

Services

Source ▶ Walk in ▼ Received Date Aug-25-2016 📅 Fee Effective Date Aug-25-2016 📅

Will this order be paid for by Credit Card?

1 Name: Rickie Ryan Roe

Applicant Relationship to Registrant: Registrant/Self

Id	Service	Quantity	Priority	Delivery	Request Reason	Other	Fee	
1	Marriage Certified Copy	1	REGULAR	Counter	Personal Records/Use		\$15.00	Edit Reverse

Add Service

Save Previous Next Return

Exercise 9.4 – Payments

Skill Learned: How to receive payments for vital records requests. Now that we have located a record and requested specific services for that record, it is time to collect any fees that are due.

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

Payments

Received Date: AUG-25-2016

Fee Effective Date: AUG-25-2016

Add Payments

▾ Add Payment

Currently there are no payments for this order. To add a payment select a payment type and click Add Payment.

SubTotal:	\$15.00
Total:	= \$15.00
Paid:	\$0.00
Balance:	= \$15.00
Change Due:	\$0.00

Edit Payer Previous Next Return

2. Selecting the **Edit Payer** button above launches the **Payer** page, shown below. Notice that the default setting on this page assumes that the applicant and the payer are the same person.

Payer

Payer: Person Organization Same As Applicant?

Name

Prefix First Middle Last Suffix Fraud Suspect?

Address

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

City or Town State Country Zip Code

Contact Information

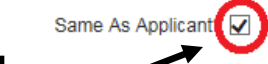
Attention:

Phone Number: - - Alternate Number: - - Fax Number: - -

Email:

[Clear](#) [Save](#) [Previous](#) [Next](#)

Deselect this checkbox to enable the onscreen fields.



3. De-select the **Same As Applicant?** checkbox to enable the onscreen fields. Enter the **Payer** data and click **Save**.

Payer

Payer: Person Organization Same As Applicant?

Name

Prefix First Middle Last Suffix Fraud Suspect?

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:

[Clear](#) [Save](#) [Previous](#) [Next](#)

4. Once the **Payer** data has been edited and saved, click the **Payments** link in the Order Processing Menu to return to the **Payments** page.

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

Payer

Payer: Person Organization Same As Applicant?

Name

Prefix First Middle Last Suffix Fraud Suspect?

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:

5. Looking at the **Payments** page, shown below, notice that the **Balance** due carries over from the **Services** page. In order to reduce the **Balance** we need to apply payments. From the **Add Payments** dropdown list, select **Cash** and click the **Add Payment** button.

Payments

Received Date: AUG-25-2016 Fee Effective Date: AUG-25-2016

Add Payments

Select Payment Type

Current payments for this order. To add a payment select a payment type and click Add Payment.

SubTotal:	\$15.00
Total:	= \$15.00
Paid:	\$0.00
Balance:	= \$15.00
Change Due:	\$0.00

6. The page will refresh and display the **Cash** grid shown below. Enter the amount of cash offered in the **Amount** field and click the **Save** link.

Payments

Received Date: AUG-25-2016

Fee Effective Date: AUG-25-2016

Add Payments

Cash

Payment Date	User	Amount	
AUG-26-2016	Trainmccs1	15.00	Save Cancel

SubTotal: \$15.00
Total: = \$15.00
Paid: \$0.00
Balance: = \$15.00
Change Due: \$0.00

7. The page will refresh again, updating the **Balance** due to \$0. Notice also the **Change Due** line. If there had been an overpayment, as would be the case if a customer mailed a \$50 check to pay a \$20 balance, the amount due back to the customer displays here.

Payments

Received Date: AUG-25-2016

Fee Effective Date: AUG-25-2016

Add Payments

Cash

Payment Date	User	Amount	
AUG-26-2016	Trainmccs1	15.00	Edit Delete

SubTotal: \$15.00
Total: = \$15.00
Paid: \$15.00
Balance: = \$0.00
Change Due: \$0.00

8. Click the [Delete](#) link in the **Cash** payment grid. **DAVE™** will post a query message before deleting the payment. Click the **OK** button to delete this payment.

Payments

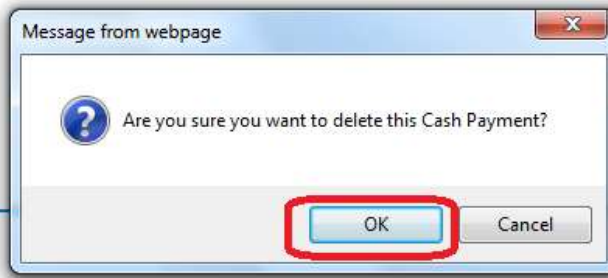
Received Date: MAY-09-2016

Fee Effective Date: MAY-09-2016

Add Payments

Cash

Payment Date	User	Amount	
MAY-09-2016	Trainmccs1	15.00	Edit Delete



SubTotal: \$15.00
Total: = \$15.00
Paid: \$15.00
Balance: = \$0.00
Change Due: \$0.00

- To receive a payment in the form of a Check, select **Check** from the **Add Payments** dropdown list and click the **Add Payment** button.

Add Payments

- The page will refresh and display the **Check/Money Order** payment fields. Enter the **Check #** presented and the **Amount** paid by check. Notice that **Type** is pre-filled with **Check**. Click the [Save](#) link to accept the check payment.

Payments

Received Date: AUG-26-2016

Fee Effective Date: AUG-26-2016

Add Payments

Check / Money Order

Payment Date	User	Check #	Type	Amount	
AUG-26-2016	Trainmccs1	56722	Check	15.00	Save Cancel

SubTotal: \$15.00
Total: = \$15.00
Paid: \$0.00
Balance: = \$15.00
Change Due: \$0.00

- The page will refresh and display the **Balance** and **Change Due** amounts of \$0.00.

Payments

Received Date: AUG-26-2016

Fee Effective Date: AUG-26-2016

Add Payments

Add Payment

Check / Money Order

Payment Date	User	Check #	Type	Amount	
AUG-26-2016	Trainmccs1	56722	Check	15.00	Edit Delete

SubTotal: \$15.00
Total: = \$15.00
Paid: \$15.00
Balance: = \$0.00
Change Due: \$0.00

Edit Payer Previous Next

- 12. Click the [Delete](#) link in the **Check/Money Order** payment grid. **DAVE™** will post a query message before deleting the payment. Click the **OK** button to delete this payment.

Payments

Received Date: AUG-26-2016

Fee Effective Date: AUG-26-2016

Add Payments

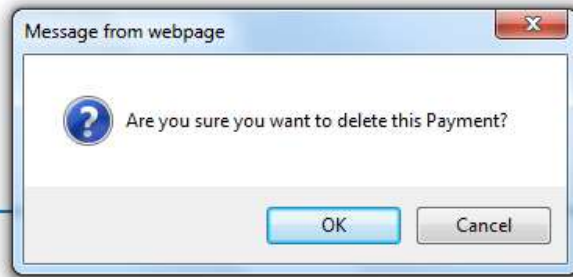
Add Payment

Check / Money Order

Payment Date	User	Check #	Type	Amount	
AUG-26-2016	Trainmccs1	56722	Check	15.00	Edit Delete

SubTotal: \$15.00
Total: = \$15.00
Paid: \$15.00
Balance: = \$0.00
Change Due: \$0.00

Edit Payer Previous Next



Payment by Money Order

- 13. From the **Add Payments** dropdown list, select **Money Order** and click the **Add Payment** button.

Payments

Received Date: AUG-26-2016

Fee Effective Date: AUG-26-2016

Add Payments

Cash
Check
Money Order
Refund

Add Payment

no payments for this order. To add a payment select a payment type and click Add Payment.

SubTotal: \$15.00
Total: = \$15.00
Paid: \$0.00
Balance: = \$15.00
Change Due: \$0.00

Edit Payer Previous Next Return

- 14. The page will refresh and display the **Check/Money Order** payment fields. Enter the money order number presented in the **Check #** field and the **Amount** paid. Notice that **Type** is pre-filled with **Money Order**. Click the **Save** link to accept the check payment.

Payments

Received Date: AUG-26-2016

Fee Effective Date: AUG-26-2016

Add Payments

▼

Add Payment

Check / Money Order

Payment Date	User	Check #	Type	Amount	Save	Cancel
AUG-26-2016	Trainmccs1	7890	Money Order	15.00		

SubTotal: \$15.00
Total: = \$15.00
Paid: \$0.00
Balance: = \$15.00
Change Due: \$0.00

Edit Payer Previous Next Return

- 15. The page will refresh and display the **Balance** and **Change Due** amounts of \$0.00.

Payments

Received Date: AUG-26-2016

Fee Effective Date: AUG-26-2016

Add Payments

Check / Money Order

Payment Date	User	Check #	Type	Amount	
AUG-26-2016	Trainmccs1	7890	Money Order	15.00	Edit Delete

SubTotal: \$15.00
 Total: = \$15.00
 Paid: \$15.00
 Balance: = \$0.00
 Change Due: **\$0.00**

Note: Balance must be equal to \$0 before a Marriage Certificate will be issued. Order status will remain invalid if Balance due is greater than \$0.

Validate Order

Notice that at the top of each Order Processing page is a **Status Bar**.

16. Notice that the status of this order is **Order Valid/Incomplete/Registration on Hold**.

Order Processing Menu

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

20160800245 :Rickie Ryan Roe
 /Order Invalid/Incomplete/Registration On Hold

Order Summary

Source: Walk in Received Date: AUG-25-2016	ProCheck / ProID Status: Fee Effective Date: AUG-25-2016															
Applicant Information Name: Rickie Ryan Roe Address: 77 Elm Street Augusta, Maine 04330 Attention: Rickie Roe Phone: Email:	Payment Information <table 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>\$15.00</td> <td>Cecile Test</td> </tr> <tr> <td colspan="2">Paid:</td> <td>\$15.00</td> </tr> <tr> <td colspan="2">Due:</td> <td>\$15.00</td> </tr> <tr> <td colspan="2">Balance:</td> <td>\$0.00</td> </tr> </tbody> </table>	Type	Amount	User	Cash	\$15.00	Cecile Test	Paid:		\$15.00	Due:		\$15.00	Balance:		\$0.00
Type	Amount	User														
Cash	\$15.00	Cecile Test														
Paid:		\$15.00														
Due:		\$15.00														
Balance:		\$0.00														

Event Requested

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

Relation: Registrant/Self

Status: /License Valid/Marriage Valid/Issued/Approved/Registered/Hold

Comments:

Matched Events				Services				
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee
Rickie Ryan Roe	Yes	1	Aug-23-2016 02:44 PM	Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue

Validation Results

Error Message	Event Id	Service Id	Override
OP0001: Event requested has a hold status. Refer to Holding Clerk for processing.	1		

- To check an order for any possible errors, locate and click the **Validate Order** button at the bottom of the page.

Order Processing Menu

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

20160800245 -Rickie Ryan Roe
 Order Invalid/Incomplete/Registration On Hold

Order Summary

Source: Walk in ProCheck / ProID Status: UO-25-2016

Address: 77 Elm Street, Augusta, Maine 04330
 Attention: Rickie Roe
 Phone:
 Email:

Cash \$15.00
 Paid: \$15.00
 Due: \$15.00
 Balance: \$0.00

User: Cecile Test

Event Requested
 Event Type: Marriage Suspend Reject Request Correspondence Work Order Amend R
 Relation: Registrant/Self
 Status: License Valid/Marriage Valid/Issued/Approved/Registered/Hold
 Comments:

Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee	Issue
Rickie Ryan Roe	Yes	1	Aug-23-2016 02:44 PM	Marriage Certified Copy	1	REGULAR	Counter	\$15.00	Issue

Buttons: New Order, Copy to New, **Validate Order**, Void, Issuance History, Previous, Return

Validation Results

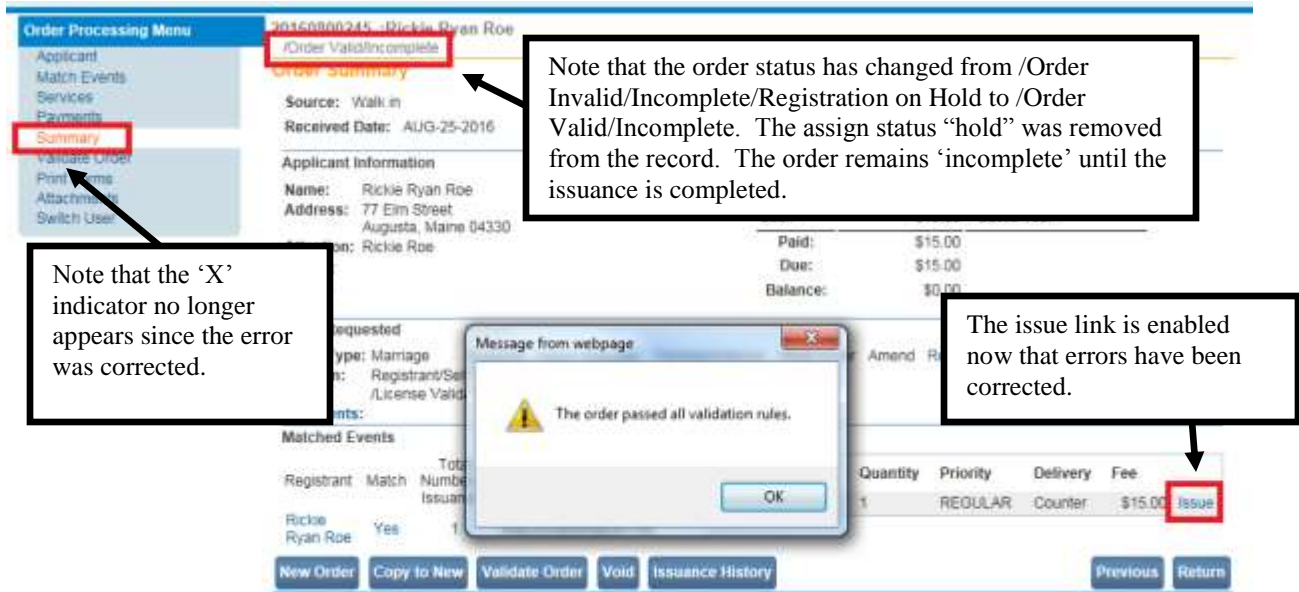
Error Message

Event Id	Service Id	Override
QP0001		1

- If there are any errors the **Validation Results** screen will appear with error(s) message(s) as shown in the example above. In addition, an “X” indicator will be shown near the Summary link.

The **Issue** link will remain disabled until the errors are corrected.

- Once error messages are corrected, and the order passes all validation rules, then a message will appear. Click the **OK** button to clear the pop-up window.



Exercise 9.5 – Order Summary Page

Skill Learned: How to examine the results of an order, place comments on an Order, and perform other order related functions.

Comments

- From the **Order Summary** page, locate and click the [Comments](#) link.

Order Summary

Source: Walk in
Received Date: AUG-25-2016

ProCheck / ProID Status:
Fee Effective Date: AUG-25-2016

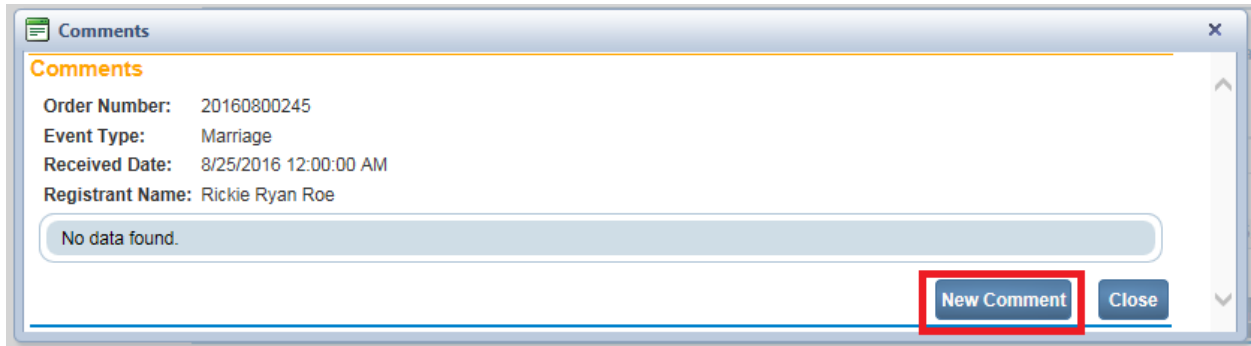
Applicant Information		Payment Information	
Name:	Rickie Ryan Roe	Type	User
Address:	77 Elm Street Augusta, Maine 04330	Cash	Cecile Test
Attention:	Rickie Roe	Paid:	\$15.00
Phone:		Due:	\$15.00
Email:		Balance:	\$0.00

Event Requested
Event Type: Marriage [Suspend](#) [Reject Request](#) [Correspondence](#) [Work Order](#) [Amend](#) [Receipt](#) [Mailing Envelope](#) [Mailing Label](#)
Relation: Registrant/Self
Status: /License Valid/Marriage Valid/Issued/Approved/Registered
Comments:

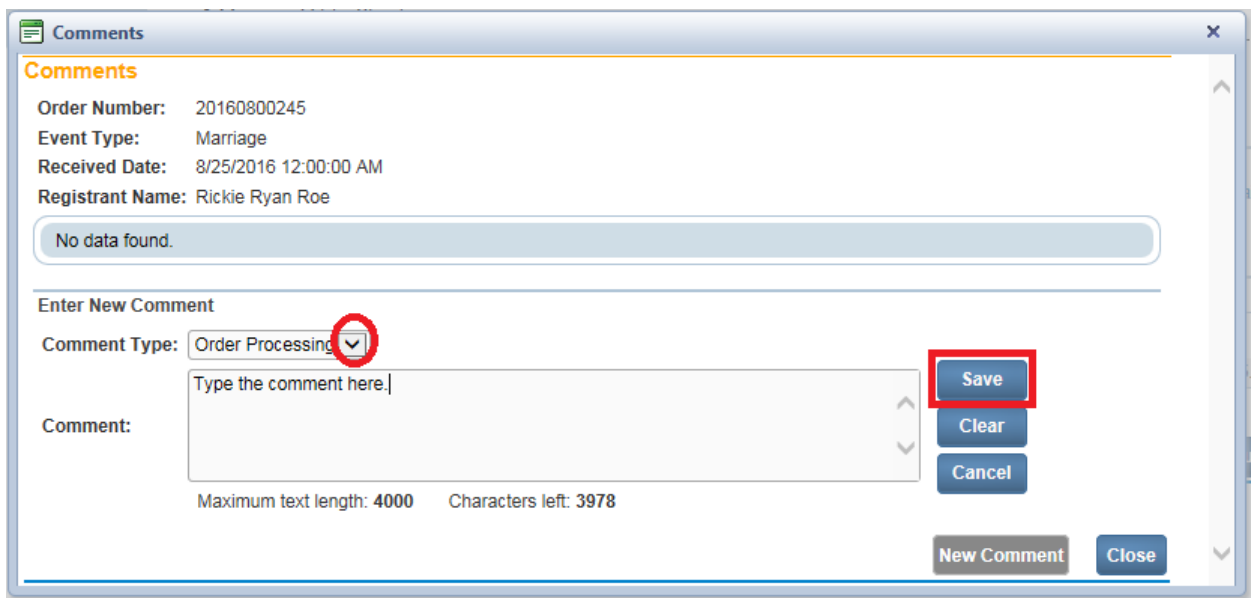
Matched Events				Services				
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee
Rickie Ryan Roe	Yes	1	Aug-23-2016 02:44 PM	Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue

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

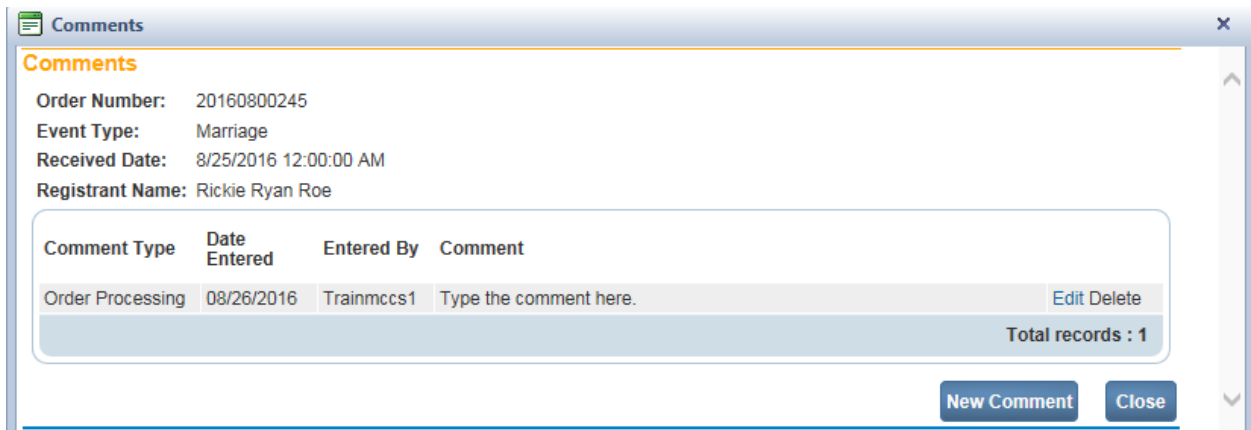
- The **Comments** page pictured below will open. Click the **New Comments** button.



- From the **Comment Type** dropdown, select **Order Processing** and enter a comment in the Comment field.



- Click **Save** to save your comments.



-
5. Once you have saved a comment, click the [Edit](#) link to re-open the comment entry form and change your comments. Select the **New Comment** button to add a new comment, or the **Close** button to close the comment dialog box.

Reject Request

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

6. Locate and select the [Reject Request](#) link on the **Order Summary** page.

Order Summary

Source: Walk in

Received Date: AUG-25-2016

ProCheck / ProID Status:

Fee Effective Date: AUG-25-2016

Applicant Information

Name: Rickie Ryan Roe

Address: 77 Elm Street
Augusta, Maine 04330

Attention: Rickie Roe

Phone:

Email:

Payment Information

Type	Amount	User
Cash	\$15.00	Cecile Test

Paid: \$15.00

Due: \$15.00

Balance: \$0.00

Event Requested

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

Relation: Registrant/Self

Status: /License Valid/Marriage Valid/Issued/Approved/Registered

Comments: Type the comment here.

Matched Events

Registrant	Match	Total Number of Issuances	Date of Last Issuance
Rickie Ryan Roe	Yes	1	Aug-23-2016 02:44 PM

Services

Service Name	Quantity	Priority	Delivery	Fee
Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue

[New Order](#)

[Copy to New](#)

[Validate Order](#)

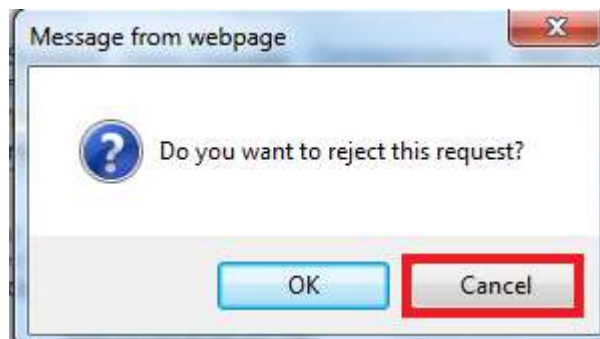
[Void](#)

[Issuance History](#)

[Previous](#)

[Return](#)

7. **DAVE™** will query to make sure that you want to reject the request. Click **Cancel** to save the order.



8. Rejecting a request cannot be undone. A new order will have to be initiated.

Note: Rejecting an order does not delete the service requested (Marriage Certified Copy) from the order. Instead, rejecting an order adds a negative service that reverses the original service. In this way, an accurate presentation of the original order is preserved in DAVE™.

Work Orders

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

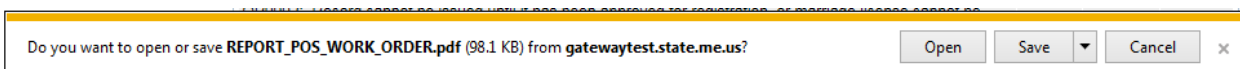
Note: The Work Order link is based on user security privileges.

- To print a work order, click the [Work Order](#) link.

Order Summary

Source: Walk in	ProCheck / ProID Status:								
Received Date: AUG-25-2016	Fee Effective Date: AUG-25-2016								
Applicant Information	Payment Information								
Name: Rickie Ryan Roe	Type	Amount	User						
Address: 77 Elm Street Augusta, Maine 04330	Cash	\$15.00	Cecile Test						
Attention: Rickie Roe	Paid:	\$15.00							
Phone:	Due:	\$15.00							
Email:	Balance:	\$0.00							
Event Requested									
Event Type: Marriage Suspend Reject Request Correspondence Work Order Amend Receipt Mailing Envelope Mailing Label									
Relation: Registrant/Self									
Status: /License Valid/Marriage Valid/Issued/Approved/Registered									
Comments: Type the comment here.									
Matched Events		Services							
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee	
Rickie Ryan Roe	Yes	1	Aug-23-2016 02:44 PM	Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue	
New Order				Copy to New	Validate Order	Void	Issuance History	Previous	Return

- A **File Download** dialog box like the one pictured below will open.



- Select the **Open** button to open the **Work Order** for printing. Click **Cancel** to close the **File Download** dialog box without printing.

Receipts

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

- To print a receipt, click the [Receipt](#) link. A **File Download** dialog box will appear.

Event Requested

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

Relation: Registrant/Self

Status: /License Valid/Marriage Valid/Issued/Approved/Registered

Comments: This is a test comment.

Matched Events				Services				
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee
Roy R. Rogers	Yes	1	Apr-25-2016 11:34 AM	Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue

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

- Click the **Open** button to open the **Receipt** for printing. Click **Cancel** to close the **File Download** dialog box without printing.



Exercise 9.6 – Issuance

Skill Learned: How to issue certified copies in **DAVE™**.

- Click the [Issue](#) link to launch the **Issuance Page**.

Order Summary

Source: Walk in

Received Date: AUG-25-2016

ProCheck / ProID Status:

Fee Effective Date: AUG-25-2016

Applicant Information

Name: Rickie Ryan Roe
Address: 77 Elm Street
 Augusta, Maine 04330
Attention: Rickie Roe
Phone:
Email:

Payment Information

Type	Amount	User
Cash	\$15.00	Cecile Test
Paid:	\$15.00	
Due:	\$15.00	
Balance:	\$0.00	

Event Requested

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

Relation: Registrant/Self

Status: /License Valid/Marriage Valid/Issued/Approved/Registered

Comments: Type the comment here.

Matched Events

Registrant	Match	Total Number of Issuances	Date of Last Issuance
Rickie Ryan Roe	Yes	1	Aug-23-2016 02:44 PM

Services

Service Name	Quantity	Priority	Delivery	Fee
Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue

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

- The **Issuance** page is used primarily to print certified copies and licenses. Note that all of the column headers are underlined. This indicates that, when more than one service exists, clicking the headers will re-sort the table based on that column's contents.

Printing a certificate:

Step 1

1. Place a checkmark in the checkbox in the [All](#) column of the record you want to print.

Note: If more than one copy of a certificate is requested, clicking on the “All” column will automatically place a checkmark in all of the rows.

The screenshot shows a web application window titled "Issuance". It contains a table with the following columns: All, Applicant Name, Service, Date Received, Priority, Delivery, Registrant, SFN, Security Paper Number, and Date Printed. A single record is displayed with a checkmark in the "All" column. Below the table, there are sections for "Actions" (with "Print Issuance" highlighted in a red box), "Void Complete", and "Numbering" (with "AutoNumber Ascending", "AutoNumber Descending", and a "Beginning Number" input field). "Save" and "Close" buttons are at the bottom right.

All	Applicant Name	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Rickie Ryan Roe	Marriage Certified Copy	08/25/2016	REGULAR	Counter	Rickie Ryan Roe	2016000031		

2. Click the [Print Issuance](#) link to print the service requested. Clicking the [Print Issuance](#) link will launch the Windows file download dialog box. Select **Open** to open the .PDF file and print the certificate.

The screenshot shows a Windows file download dialog box with the text: "Do you want to open or save Issuances.pdf (15.0 KB) from gatewaytest.state.me.us?". The "Open" button is highlighted with a red box.

3. Once the record has printed, the **Date Printed** box is filled with the current day's date.

Step 2

1. If the service requested requires safety paper (such as the marriage certificate), enter the security paper number in the **Security Paper Number** entry box and click the **Save** button. If the service requested does not require safety paper (such as a marriage license) there will not be a **Security Paper Number** entry box.

Order Processing Menu

2016000245 - Rickie Ryan Roe

Order Summary

Source: Walk in
Received Date: AUG-25-2016

Applicant Information
Name: Rickie Ryan Roe
Address: 77 Elm Street
Augusta, Maine 04330

Type: Cash
Amount: \$15.00
User: Cecile Test

Issuance

All	Applicant Name	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input type="checkbox"/>	Rickie Ryan Roe	Marriage Certified Copy	08/25/2016	REGULAR	Counter	Rickie Ryan Roe	2016000031		Aug-29-2016

Total records : 1

Actions: Print Issuance, Void, Delete

Numbering: AutoNumber Ascending, AutoNumber Descending, Beginning Number

Buttons: Save, Close

Note: Note that the order status remains at "incomplete" until all three issuance steps are completed.

Step 3

1. Once you have printed the certified copy and have distributed it to the customer, use the [Complete](#) link to mark the transaction as completed. This is the final step in processing an order.

Issuance

All	Applicant Name	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Rickie Ryan Roe	Marriage Certified Copy	08/25/2016	REGULAR	Counter	Rickie Ryan Roe	2016000031	CS0000000359	Aug-29-2016

Total records : 1

Actions: Print Issuance, Void, **Complete**, Delete

Numbering: AutoNumber Ascending, AutoNumber Descending, Beginning Number

Buttons: Save, Close

Once an order has been marked complete, the [Issue](#) link on the **Summary** page will be disabled.

20160800245 :Rickie Ryan Roe

/Completed

Order Summary

Source: Walk in
Received Date: AUG-25-2016

Note that the order status has changed from 'incomplete' to 'completed' once ALL 3 steps of the issuance are completed.

Applicant Information		Payment Information		
Name:	Rickie Ryan Roe	Type	Amount	User
Address:	77 Elm Street Augusta, Maine 04330	Cash	\$15.00	Cecile Test
Attention:	Rickie Roe	Paid:	\$15.00	
Phone:		Due:	\$15.00	
Email:		Balance:	\$0.00	

Event Requested

Event Type: Marriage
Relation: Registrant/Self
Status: /License Valid/Marriage Valid/Issued/Approved
Comments: Type the comment here.

The 'issue' link becomes disabled once the order is completed.

Matched Events				Services				
Registrant	Match	Total Number of Issuances	Date of Last Issuance	Service Name	Quantity	Priority	Delivery	Fee
Rickie Ryan Roe	Yes	2	Aug-29-2016 08:47 AM	Marriage Certified Copy	1	REGULAR	Counter	\$15.00

Buttons: New Order, Copy to New, Validate Order, Void, Issuance History, Previous, Return

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

Locate these other links on the **Issuance Web Page**.

Void – This link is used to void security paper and reprint a new certified copy. This may be necessary if a copy did not print properly, the paper jammed, etc.

Issuances

All	Applicant Name	Service	Date Received	Priority	Delivery	Registrant	SFN	Security Paper Number	Date Printed
<input checked="" type="checkbox"/>	Roy Rogers	Marriage Certified Copy	05/09/2016	REGULAR	Counter		2016000012	CS0000000352	May-09-2016

Total records : 1

Actions: Print Issuance, **Void Complete**, **AutoNumber Ascending**, AutoNumber Descending, **Delete**

Numbering: AutoNumber Ascending, AutoNumber Descending, Beginning Number

Buttons: Save, Close

AutoNumber Ascending/Descending – The **AutoNumber** feature is used to assign security paper numbers to a group of certified copies. Copies must be printed before using the AutoNumber. Follow these steps to use the AutoNumber feature:

- Place a checkmark in the **All** column of the records to be updated.

-
- b. Enter the starting number in the **Beginning Number** field.
 - c. Click the [AutoNumber Ascending](#) link to start the numbering process from the lowest numbered security paper to the highest.
 - d. Click the [AutoNumber Descending](#) link to start the numbering process from the highest numbered security paper to the lowest.

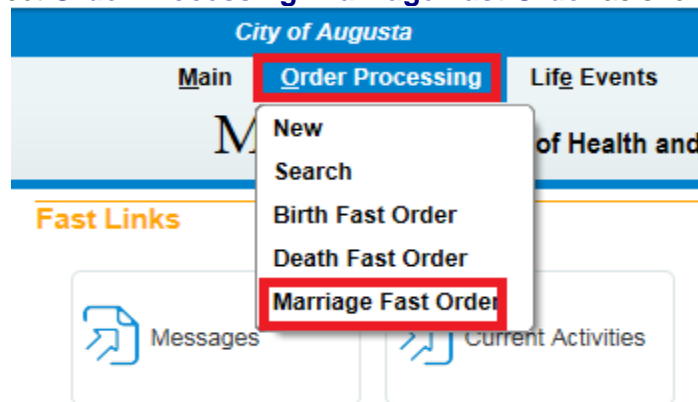
[Delete](#) – Using this link removes item(s) from the issuance queue as would be necessary if the user entered an incorrect quantity on the **Services** page. Deleting an issuance here will automatically reduce by one the quantity displayed on the services page.

Exercise 9.7 – Fast Order

Skill Learned: How to complete a fast order.

A **Fast Order** is completed the same was as a **New Order** described in Exercises 9.1 through 9.6.

On the **Home** page select **Order Processing>Marriage Fast Order** as shown below.



The difference between a **New** order versus a **Fast Order** is that a **Fast Order** is on one continuous page as shown below.

Marriage 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

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

Eligibility

Applicant Relationship: Other Specify:

Event Search

File Number: Year: Number:
Party A First: Middle: Last:
Party B First: Middle: Last:
Date of Marriage Start: End:
Place of Event City: Place of Event County:
Number of rows to be returned:

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"/> Preview	Sep-09-2016	2016000033	Coffee, David D.; Milk, Mary M.	Kennebec

Total records : 1

Service

Source ▶ Priority ▶ Delivery ▶

▶ Service	▶ Quantity	▶ Request Reason	Other specify
<input checked="" type="checkbox"/> Marriage Certified Copy	<input type="text" value="1"/>	<input type="text" value="Legal Purposes"/>	<input type="text"/>
<input type="checkbox"/> Marriage Certified Copy Veteran	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Insufficient Funds	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage License	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage License Reissue	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Marriage Non-Certified Copy	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Miscellaneous Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>

Payments

Cash SubTotal: \$15.00
Payment ▶ Total: = \$15.00
 Check Paid: \$15.00
 Refund Balance: = \$0.00
Change Due: **\$0.00**

Event Requested

Event Type: Marriage [Reject Request](#) [Correspondence](#) [Work Order](#) [Receipt](#) [Mailing Envelope](#) [Mailing Label](#)
Relation: Registrant/Self
Status: /License Valid/Marriage Valid/Issued/Approved/Registered
Comments:

Matched Events

Registrant	Match	Total Number of Issuances	Date of Last Issuance	Services										
David D. Coffee	Yes	1	Sep-09-2016 01:37 PM	<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> </tr> </thead> <tbody> <tr> <td>Marriage Certified Copy</td> <td>1</td> <td>REGULAR</td> <td>Counter</td> <td>\$15.00 Issue</td> </tr> </tbody> </table>	Service Name	Quantity	Priority	Delivery	Fee	Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue
Service Name	Quantity	Priority	Delivery	Fee										
Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue										

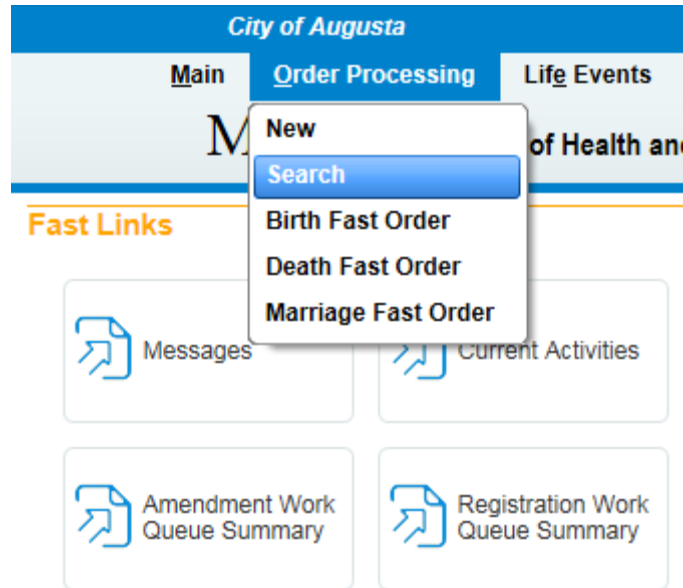
Section 10: Search For Existing Orders

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 10.1 – Order Processing Search Menu

Skill Learned: How to locate and use the **Order Processing -> Search** functionality.

- 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:

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:

Maximum records to display:

Search by Matched Event

Event Type:

Search Criteria 1:

Value 1:

Search Criteria 2:

Value 2:

Exercise 10.2 – Search by Order

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

- 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** box. Enter

your **Received between** start and end date and click the **Search** button at the bottom of the page.

Search By Order

Order Number:

VPS Order Number:

Security Paper Number:

Tracking Number:

Received between and

2. The search outlined above returned the following results.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20160800248	AUG-29-2016	Rickie Roe	Marriage	2016000031	Rickie Ryan Roe;Tammy T. Toe
20160800247	AUG-26-2016	Test Applicant	Marriage	2016000015	Omr O. Orange;Yessim Y. Yellow
20160800246	AUG-26-2016	ce te	Death	2015508931	Anastasia Bracey
20160800245	AUG-25-2016	Rickie Ryan Roe	Marriage	2016000031	Rickie Ryan Roe;Tammy T. Toe
20160800244	AUG-23-2016	Applicant On File	Marriage	2016000031	Rickie Ryan Roe;Tammy T. Toe
20160800243	AUG-23-2016	Applicant On File	Marriage		James J. Tavern;Brenda B. Bar
20160800242	AUG-23-2016	Applicant On File	Marriage		James J. Tavern;Brenda B. Bar
20160800241	AUG-23-2016	Applicant On File	Marriage		Larry L. Lion;Tina T. Tiger
20160800240	AUG-22-2016	Applicant On File	Marriage		Bob B. Carnes;Ann A. Glory
20160800239	AUG-22-2016	Applicant On File	Marriage		Bob B. Carnes;Ann A. Glory
20160800238	AUG-22-2016	Applicant On File	Marriage		Bob B. Carnes;Ann A. Glory

Total records : 11

[New Search](#)

3. To open an order in the list, click the [Order Number](#) link. The Summary page of the order selected will display.

Order Summary

Source: Walk in
Received Date: AUG-25-2016

ProCheck / ProID Status:
Fee Effective Date: AUG-25-2016

Applicant Information

Name: Rickie Ryan Roe
Address: 77 Elm Street
Augusta, Maine 04330
Attention: Rickie Roe
Phone:
Email:

Payment Information

Type	Amount	User
Cash	\$15.00	Cecile Test
Paid:	\$15.00	
Due:	\$15.00	
Balance:	\$0.00	

Event Requested

Event Type: Marriage Correspondence Work Order Amend Receipt Mailing Envelope Mailing Label
Relation: Registrant/Self
Status: /License Valid/Marriage Valid/Issued/Approved/Registered
Comments: Type the comment here.

Matched Events

Registrant	Match	Total Number of Issuances	Date of Last Issuance
Rickie Ryan Roe	Yes	2	Aug-29-2016 08:47 AM

Services

Service Name	Quantity	Priority	Delivery	Fee
Marriage Certified Copy	1	REGULAR	Counter	\$15.00 Issue

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

- Select the Return button to return to the Search results page. Please write down an order number from the search results page.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20160800248	AUG-29-2016	Rickie Roe	Marriage	2016000031	Rickie Ryan Roe, Tammy T. Toe
20160800247	AUG-26-2016	Test Applicant	Marriage	2016000015	Omri D. Orange, Yessim Y. Yellow
			Marriage	2016000015	Omri D. Orange, Yessim Y. Yellow
20160800246	AUG-26-2016	ce te	Death	2015508931	Anastasia Bracey
20160800245	AUG-25-2016	Rickie Ryan Roe	Marriage	2016000031	Rickie Ryan Roe, Tammy T. Toe
20160800244	AUG-23-2016	Applicant On File	Marriage	2016000031	Rickie Ryan Roe, Tammy T. Toe
20160800243	AUG-23-2016	Applicant On File	Marriage		James J. Tavern, Brenda B. Bar
20160800242	AUG-23-2016	Applicant On File	Marriage		James J. Tavern, Brenda B. Bar
20160800241	AUG-23-2016	Applicant On File	Marriage		Larry L. Lion, Tina T. Tiger
20160800240	AUG-22-2016	Applicant On File	Marriage		Bob B. Carnes, Ann A. Glory
20160800239	AUG-22-2016	Applicant On File	Marriage		Bob B. Carnes, Ann A. Glory
20160800238	AUG-22-2016	Applicant On File	Marriage		Bob B. Carnes, Ann A. Glory

Total records : 11

[New Search](#)

- Select the New Search Button.
- Click the **Clear** button to clear out the previous search criteria.

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:

Maximum records to display:

Search by Matched Event

Event Type:

Search Criteria 1:

Value 1:

Search Criteria 2:

Value 2:

- This time we will search by Order Number. Enter the order number you recorded in step 4 and select the Search button at the bottom of the page. This type of search will always return one result.

Exercise 10.3 – 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. For marriages, the registrant is either Party A or Party B.

- In the **Search by Event Requested** section, enter the vital event registrant's **First Name** and **Last Name** and click the **Search** button.

Search by Event Requested

First Name:

Last Name:

- Notice that in the records returned below that all registrants share the same name. Again, click any [Order Number](#) link to open the order for review/editing.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20160800248	AUG-29-2016	Rickie Roe	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe
20160800245	AUG-25-2016	Rickie Ryan Roe	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe
20160800244	AUG-23-2016	Applicant On File	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe

Total records : 3

New Search

Exercise 10.4 – Search By Applicant

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

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.

Search by Applicant

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

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:

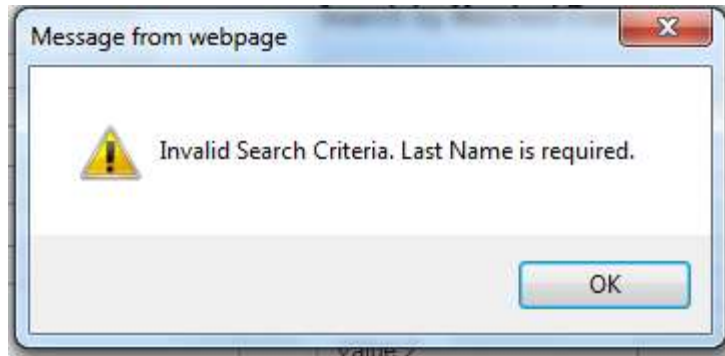
Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20160800248	AUG-29-2016	Rickie Roe	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe
20160800245	AUG-25-2016	Rickie Ryan Roe	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe

Total records : 2

New Search

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



Exercise 10.5 – Search By Matched Event

Skill Learned: How to search for an order based on the data values in the match registration.

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.

Search by Matched Event

Event Type:	Death ▼
Search Criteria 1:	▼
Value 1:	
Search Criteria 2:	▼
Value 2:	

2. Select **Marriage** from the **Event Type** dropdown list.

Search by Matched Event

Event Type:	Birth Death Marriage
Search Criteria 1:	▼
Value 1:	
Search Criteria 2:	▼
Value 2:	

3. Next, make a selection from **Search Criteria 1**.

4. Enter the corresponding value in **Value 1**. For example, if you select **Party A First Name** for **Search Criteria 1**, then you would enter Party A's first name in **Value 1**. When searching by event, a valid **Search Criteria 1** with corresponding **Value 1** data must be entered.
5. However, when searching based on **Party A's First Name**, you must also select **Party A's Last Name** as **Search Criteria 2** and complete the **Value 2** field.
6. Searching on **Party A's First Name** only will generate an error message.
7. 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:

8. 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 marriage orders for Rickie Roe. This search returns the following results:
9. Regardless of the search method used, clicking the corresponding order number will always open the **Summary** page for that order.

Results

Order Number	Date Received	Applicant Name	Event Type	SFN	Registrant Name
20160800248	AUG-29-2016	Rickie Roe	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe
20160800245	AUG-25-2016	Rickie Ryan Roe	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe
20160800244	AUG-23-2016	Applicant On File	Marriage	2016000031	Rickie Ryan Roe,Tammy T. Toe

Total records : 3

[New Search](#)

Section 11: Security Paper Management

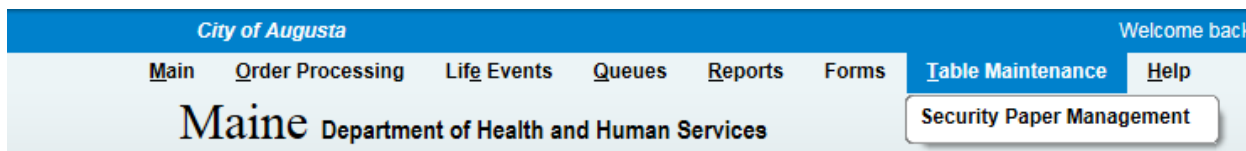
Skill Learned: How to add, void, view and search for Safety Paper.

Exercise 11.1 – Add Safety Paper in Security Paper Management.

When adding safety paper to **DAVE™** it is faster and easier to add a range of safety paper that is in numeric order. For example, add safety paper numbers 100001 through 100050. Do not add more than 499 sheets of paper.

Safety paper assigned to **DAVE™** should only be used for the **DAVE™** system.

1. Log into **DAVE™**.
2. On the **Home** page select **Table Maintenance>Security Paper Management**.



3. The “**Select the desired action**” dialog box will open as shown below.
4. Click on the “**Add Paper Numbers to Master Inventory**” link as shown below.

Security Paper

Select the desired action

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

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

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

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)

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

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

8. 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.)
9. Select SAVE.

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

10. The “**Add Paper Numbers to Master Inventory Results**” dialog box will open.
11. The message “Paper range was successfully added” will be shown.

Note: At this point the Safety Paper is only stored in the Master Inventory. The next steps instructs DAVE™ which city/town owns the specified range of safety paper added in the above steps.

12. Click on the “**Assign part of this range**” link. This step will instruct DAVE™ which city/town owns the range of safety paper numbers added in Step 9.

(Note: If Step 12 is accidentally skipped, go back to the **Table Maintenance>Security Paper Management** menu and select the “**Assign Security Paper**” link.

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

13. 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

14. 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

15. Select your city/town.

16. 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 11.2 – Void Safety Paper in Security Paper Management

Go to the **Home** page.

1. Select the “**Table Maintenance**” menu.
2. Select “**Security Paper Management**”.
3. Click the “Void Security Paper” link as shown below in the Change box shown below.

Security Paper

Select the desired action

Add Add Paper Numbers to Master Inventory Assign Security Paper	Change Void Security Paper Delete from Master Inventory Reassign to Master Inventory	View View Security Paper Assignments Search for Security Paper
--	--	---

-
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

Exercise 11.3 – View Safety Paper in Security Paper Management

Go to the **Home** page.

1. 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>Add</p> <p>Add Paper Numbers to Master Inventory</p> <p>Assign Security Paper</p>	<p>Change</p> <p>Void Security Paper</p> <p>Delete from Master Inventory</p> <p>Reassign to Master Inventory</p>	<p>View</p> <p>View Security Paper Assignments</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

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

Security Paper

View Security Paper Assignments

Paper Type
Assigned to Office

Range Assigned	Sheets Voided	Sheets Used	Sheets Available
00000100001-00000100050	0	0	50
00000332312-00000333000	29	831	29
00000574001-00000574495	1	255	239
00000574501-00000575000	0	0	500
00000900700-00000900750	5	5	39

Total records : 5

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

Search Return

Exercise 11.4 – Search Safety Paper in Security Paper Management

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 the **Table Maintenance** menu.
3. Select “**Security Paper Management**”.
4. Select “Search for Security Paper” as shown below.



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



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 20121200856
Order Subject Name Tolan Kirk
Applicant Name Plummer Funeral Home (Augusta)
Clerks Name pcjd Marie wdolbn

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.

Section 12: Legacy Records

Legacy Records are paper records that have already been registered, but have not yet been keyed into the **DAVE™** system.

Note: Legacy Records will be entered into the DAVE™ system at a future date. Clerks will be notified when this will occur.

Exercise 12.1 – Entering Legacy Records

1. From the **Home** page select **Life Events>Marriage>Start/Edit New Case**.



2. Key in the required fields on the **Start/Edit New Case** page. Select **Search**.

A screenshot of the 'Marriage Start/Edit New Case' form. The form has a yellow header. It contains several input fields: 'Party A First Name' (Lee), 'Party A Last Name' (Leland), 'Party B First Name' (Sofia), 'Party B Last Name' (Singer), 'Date of Marriage' (Feb-12-1980), and 'County of Marriage'. There are 'Search' and 'Clear' buttons at the bottom right.

3. On the **Marriage Search Results** page select the **Start New Case** button.

A screenshot of the 'Marriage Search Results' page. It has a yellow header. A message box states: 'There are no cases that match the criteria you have entered. If this is a new case, select the Start New Case button or select the New Search button to perform a new search.' At the bottom right, there are 'Start New Case' and 'New Search' buttons. The 'Start New Case' button is highlighted with a red box.

4. The **Party A** page will appear. Under the **Marriage Registration Menu, Registrar** submenu, select the **Identifiers** link as shown below.

Marriage Registration Menu 308971 :Lee Leland, Sofia Singer Feb-12-1980
/New Event/New Event/NANA/Not Registered

License

Party A

Party A Parents

Party A Other Information

Party A Attributes

Party B

Party B Parents

Party B Other Information

Party B Attributes

Local Official

Marriage

Officiant

Filing Official

Registrar

Identifiers

Other Links

Assign Status

Attachments

Print Forms

Comments

Correspondence

Event and Issuance History

Issue This Record

Validate Registration

Party A

Preferred Title

Current Name

First Middle Other Middle Last Suffix

Lee Leland

Copy Current Name

Name Prior to First Marriage

First Middle Other Middle Last Suffix

Birthplace

Birthplace State Birthplace Country

United States

Date of Birth Age Sex

Validate Page Next Clear Save Return

5. The **Identifiers** page appears.

Marriage Registration Menu 308971 :Lee Leland, Sofia Singer Feb-12-1980
/New Event/New Event/NANA/Not Registered

License

Party A

Party A Parents

Party A Other Information

Party A Attributes

Party B

Party B Parents

Party B Other Information

Party B Attributes

Local Official

Marriage

Officiant

Filing Official

Identifiers

Record Source

State File Number

Local Registration Number

Dissolution Date

File Date

Refresh Report Extract Date

Electronic

Paper

Validate Page Clear Save Return

6. The default **Record Source** is **Electronic**. From the **Record Source** dropdown select **"Paper"**.

7. Since a legacy record is already a registered record, key in the **State File Number** and the **File Date** shown on the paper record.

Identifiers

Record Source

State File Number

Local Registration Number

Dissolution Date

File Date

Refresh Report Extract Date

Paper

000033

Feb-12-1980

Validate Page Clear **Save** Return

WARNING: If these two fields are erroneously left blank, DAVE™ will automatically assign both a [State File Number](#) and a [File Date](#) which will NOT match the record. Please contact the Vital Records office if this occurs.

8. Click **SAVE**.
9. The Status Bar will show the [State File Number](#) that was keyed on the Identifier page. Note that the State File Number is preceded by the year the record was filed.

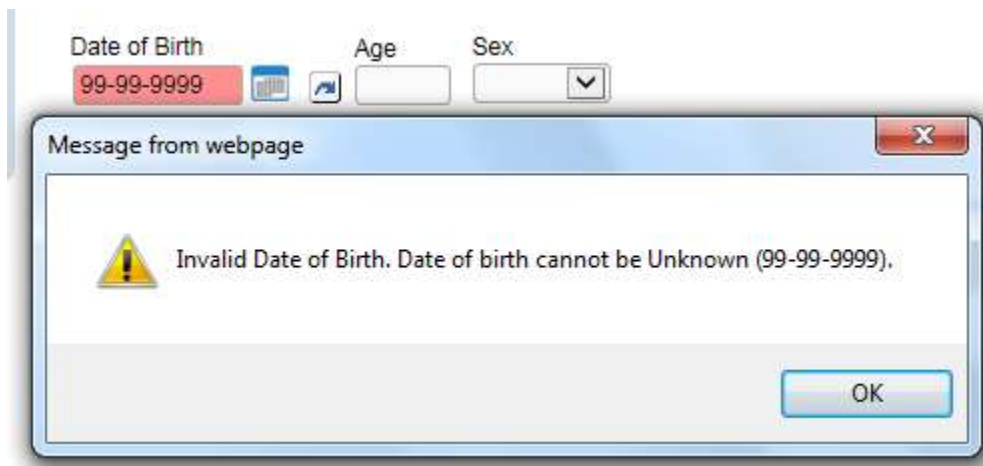
308971 | 1980000033 :Lee L. Leland, Sofia S. Singer

Before completing the remaining steps below, please note that there may be data fields in the DAVE™ registration that we collect information on today, that is not available on legacy records. Leave those fields blank. E.g., the record may have the age, but not the date of birth.

In addition, any dates that are not available on the legacy records, on the DAVE™ registration pages enter an unknown date format as discussed in Section 2, and shown below.

If user enters:	System will display:
99-99-9999	999-99-9999
99-99-1990	1990
Jan-99-1990	Jan 1990

The Date of Birth, however, cannot be an unknown date format.



In cases where the Date of Birth is unknown, leave the field blank. An edit rule will fire as shown below and will need to be overridden.

First: Middle: Other Middle: Last: Suffix:

Birthplace: Birthplace State:

Date of Birth: Age: Sex:

Date of Birth cannot contain any of the 'unknown' date formats. If the Date of Birth is unknown, leave the field blank and enter Age. Edit rule will need to be overridden.

Validation Results			
Error Message	Override	Goto Field	Popup
MG0043: Party A's Date of Birth cannot be left blank. The Party A's date of birth cannot be left blank.	<input type="checkbox"/>	<input type="button" value="fix"/>	<input type="button" value="fix"/>

10. Complete the **Party A** page.

An edit rule will fire on the Parties' **Age** since **DAVE™** calculates the **Age** based on {Current Date - Date of Birth}.

308971 1980000033 :Lee L. Leland, Sofia Singer Feb-12-1980

Party A

Preferred Title:

Current Name: First: Middle: Other Middle: Last: Suffix:

Name Prior to First Marriage: First: Middle:

Birthplace: Birthplace State: Birthplace Country:

Date of Birth: Age: Sex:

The AGE is calculated based on Current Date – Date of Birth. In this example, that would make Party A actually 56 years old the day this legacy record is keyed into DAVE™. Therefore, the user would need to edit the age based on the Date of Marriage – Date of Birth as shown on Legacy Record. The edit rule(s) for both Party A and Party B will need to be overridden.

Validation Results			
Error Message	Override	Goto Field	Popup
MG3318: Party A's age is inconsistent with calculated age. Please verify Party A's Age.	<input type="checkbox"/>	<input type="button" value="fix"/>	<input type="button" value="fix"/>

11. Complete the **Party A Parents** page.
12. Complete the **Party A Other Information** page.
13. Complete the **Party A Attributes** page.
14. Complete the **Party B** page.
15. Complete the **Party B Parents** page.
16. Complete the **Party B Other Information** page.
17. Complete the **Party B Attributes** page.
18. Complete the **Local Official** page.

· 308971 1980000033 :Lee L. Leland, Sofia S. Singer Feb-12-1980
 /License Invalid/Marriage Invalid/NA/NA/Not Registered/License Pending/Marriage Pending

Local Official

Date License Issued Waive
 License Expiration Date
 Intentions Filed Date

Issuing Official

Local Official Office

 Issuing Official

 First Middle Last Suffix
 Title

The Issuing Official dropdown contains those users that are current today. Since the municipal clerk back in the year 1980 when this paper record was created is not a user today, do not select from the Issuing Official dropdown as the user's name will not be available. Instead, type in the name of the municipal clerk who issued this record in 1980 in the First, Middle, and Last Name fields as shown here. Once the page is validated, the name will system-fill the Issuing Official field.

Party A Date Signed Party B Date Signed

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

19. Because this is a registered paper record, there is no need to select Approve License.

308971 1980000033 : Lee L. Leland, Sofia S. Singer Feb-12-1980
 License Valid with exceptions/Marriage Invalid/N/A/N/A/Not Registered/Marriage Pending

Local Official

Date License Issued: Jan-01-1980 Waiver Submitted

License Expiration Date: Mar-31-1980

Intentions Filed Date: Ja **Do NOT select the 'Approve License' link as license was already approved at the time the paper record was done.**

Issuing Official
 Local Official Office: City of Augusta

Issuing Official
 Rowe, Rebecca

First: Rebecca Middle: R. Last: Rowe Suffix:

Title: Municipal Clerk

Party A Date Signed: Jan-01-1980 Party B Date Signed: Jan-01-1980

Buttons: Validate Page, Next, Clear, Save, Return

20. Complete the **Officiant** page.
21. Complete the **Filing Official** page.

If the **Filing Official** on a registered paper record is not a user of the DAVE system today, key in the first, middle, and last name of the filing official.

Filing Official

Filing Official

First: Rebecca Middle: R. Last: Rowe Suffix:

Title: Municipal Clerk

Local File Date: Feb 12 1980

Buttons: Validate Page, Next, Clear, Save, Return

22. Select the **Validate Page** button. The **Filing Official** dropdown will automatically be system-filled with the name keyed in.
23. The **Approve Filing** link will NOT be visible as this is already a registered paper record.

Note that once the status is License Valid or License Valid with Exceptions, and Marriage Valid or Marriage Valid with exceptions, the '**Registration Approval Required**' status appears.

308971 1980000033 :Lee L. Leland, Sofia S. Singer Feb-12-1980

/License Valid with exceptions/Marriage Valid with exceptions/NA/NA/Not Registered/Registration Approval Required

Filing Official

Filing Official

Rowe, Rebecca

First

Rebecca

Middle

R.

Last

Rowe

Suffix

Title

Municipal Clerk

Local File Date Feb-12-1980

Validate Page

Next

Clear

Save

Return

24. The record is ready for registration into the **DAVE™** system.

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 entry 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.

Local Official

Date License Issued  Waiver Submitted

License Expiration Date 

Intentions Filed Date 

Issuing Official

Local Official Office

City of Augusta


Issuing Official

First

August 2016

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Today Clear Cancel

 - **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.

Waiver Submitted

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


Preferred Title





- **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.

Preferred Title


Groom
Bride
Spouse
None

 - **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.

Validation Results	List All Errors	Save Overrides	Hide
Error Message	Override	Goto Field	Popup
MG0005: Party A Current Middle Name cannot be left blank Enter a valid Party A Current Middle Name	<input type="checkbox"/>		

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 Party’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 indicate the Social Security Number is either “None” or “Unknown”, but cannot select both.


Social Security Number


None Unknown

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

 - **Validation Circle-Yellow:** this is a display only icon. Clicking it has no effect. This icon is used in the **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.


Using the three different symbols above (, , and ) helps to support those with color deficiencies.

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.


Address

Street Number	Pre Directional	Street Name, Rural R	Street	Post	Apt #, Directional Suite #, etc.
123	▼	East		▼	
City, Township or Borough	County	State	Country	Zip Code	
 Albany		NY	United States	10011	
Locality	If City or Village, is Residence within City or Village Limits?				
City ▼	Yes ▼				

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.

Address

Street Number	Pre Directional	Street Name, Rural Route, etc.	Street	Post	Apt #
123	▼	East			
City, Township or Borough	County	State	Country	Zip Code	
 Albany	Albany	NY	United States	10011	
Locality	If City or Village, is Residence within City or Village Limits?				
City ▼	Yes ▼				

The highlighted text within this box indicates this control has the focus.

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

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

Race

Check one or more of the following boxes that best describe how you considered yourself or herself to be:

<input checked="" type="checkbox"/> White	<input type="checkbox"/> Vietnamese	<input type="checkbox"/> Samoan
<input type="checkbox"/> Black or African American	<input type="checkbox"/> Other Asian	<input type="checkbox"/> Other Pacific Islander
<input type="checkbox"/> American Indian or Alaska Native	<input type="checkbox"/> Japanese	<input type="checkbox"/> Other(Specify)
<input type="checkbox"/> Asian Indian	<input type="checkbox"/> Korean	<input type="checkbox"/> Native Hawaiian
	<input type="checkbox"/> Guamanian or Chamorro	

The dotted outline around this radio button tells you that this box has the focus.

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