

Iowa

County Recorder User Manual

Guide in Utilizing the Iowa Vital Event System – Next Generation

Table of Contents

| | | | |
|---|---------|-------------------------------------|----------|
| Login..... | Page 3 | Scan & Attach Image/Documents..... | Page 46 |
| Home Page..... | Page 4 | Editing Images (Certificate)..... | Page 56 |
| Entering New Inventory..... | Page 5 | Plain Paper Copy..... | Page 62 |
| Adding to Existing Inventory..... | Page 9 | Transmittal..... | Page 63 |
| Damaging “Spoiled” Safety Paper..... | Page 12 | Verification..... | Page 69 |
| Restocking Paper..... | Page 15 | Making Notes..... | Page 73 |
| New Applications..... | Page 19 | New Marriage Application..... | Page 75 |
| Multiple Requests..... | Page 29 | Printing Marriage Applications..... | Page 90 |
| Search Pending or Processed Applications..... | Page 30 | Marriage Waiver..... | Page 93 |
| Cancelling an Application..... | Page 31 | Return Marriage..... | Page 98 |
| Exchanging Certified Copies..... | Page 33 | Current Marriage Correction..... | Page 105 |
| Accounting Reports..... | Page 35 | Marriage Registration Report..... | Page 112 |
| ACH..... | Page 36 | Basic Conventions..... | Page 115 |
| Forward to State..... | Page 41 | Keyboard Shortcuts..... | Page 116 |

Login

VRS-NX Netsmart Dependencies Contact About

Iowa UAT
VRS-NX IA

Welcome to IVES-NX, the future of IVES

User name: jnichols

Password: ...

Login

Reset password

Log into the IVES-NX

Note: Passwords must be at least 8 characters, and contain an uppercase and lower case letter, a number and a special character.

(Note: **Very important you use this link to bookmark.** Below the login box, you can bookmark the application for future use.)

Security Question

Please answer the security question below and click OK. (The answer is case-sensitive.)

who am I

Answer:

OK Cancel

Answer your security question.

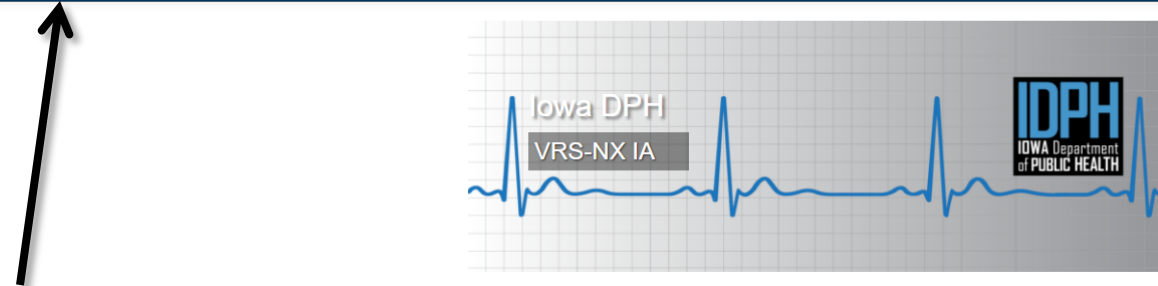
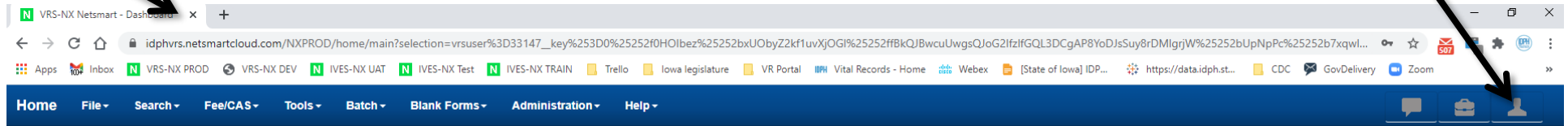
This question will be asked every time you login to the system. There are no requirements for lower, upper case, or special characters or numbers. However, the question answer is case sensitive.

Only click **OK** button.

Home Page

Web Browser Tab
Contains the website for
IVES-NX

Profile



Work Queues

| |
|-----------------------------|
| CAS Requests Pending |
| M App Pending |
| M Change Request - Pending |
| M Change Request - Rejected |
| M Pending Marriage Return |
| Verification - Completed |
| Verification - Pending |

[Back to top](#)

Work Queues

CAS Requests Pending – Pending application requests for a certified certificate.

M App Pending – Pending marriage records where the license complete is not marked “yes” with the date and signature on the Application/License tab.

M Change Request Pending – Incomplete marriage change requests

M Change Request Rejected – Rejected marriage change request by the State

M Pending Marriage Return – Records waiting for the Certificate of Marriage to be signed and returned.

Verification Complete – Verification requests confirmed by the State

Verification Pending – Incomplete verification request

Main Menus

File - Create new marriages, change requests or inventories. Able to re-login or log out.

Search – Search for records, change requests, document tracking or inventories.

Fee/CAS – Create new or search for applications, verifications or transmittals.

Tools – Create and search for security question.

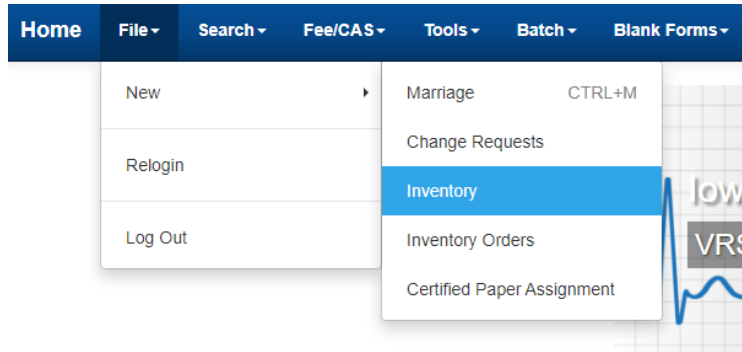
Batch – Search and print reports.

Blank Forms – Blank forms of an application, 3-day waiver, address update and consent to minor.

Help – Quick access to user manual, forms, links to VR portal, seal and birth/death match reports, etc.

Entering Inventory

Note: This process can be used everytime a new Header (Store) is created. Recommend each Header (Store) has no more than 2000 pages of control paper.



Entering Inventory

To create a new Header (Store) and enter the new batch of control paper numbers, Users must go through the Inventory process. From the main menu **File > New > Inventory**



Inventory: New

Image count: 0 Notes count: 0 Alerts: 0

Item Information Missing Stock

Item/Summary

Inventory Item: Location Of Owner: Polk Owner: Store

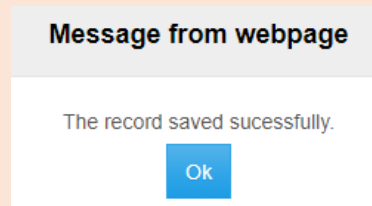
Unit: Each Count Per Unit:

| Headerid | Quantity Ordered | Quantity Received | Quantity Shipped | Quantity Available |
|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

To enter NEW State Paper inventory

Click on the drop down arrow under **Inventory Item** field, and click **State Certified Paper**.

Click **SAVE** - Receive pop up message – Click **OK**



Transaction

Clear Transaction Transaction Date

Create Inventory Transaction Notes

Transaction Type Quantity Begin Number End Number

Transaction Type dropdown menu:

- COMBINE
- DAMAGED
- ORDER
- RECEIVE
- RESTOCK
- SHIP
- SPLIT-ALL-TO-STOCK
- Search...

Available In Stock/Transaction Details

Available In Stock

Transaction Details

Search...

Adding the "Receive" safety paper shipment

- Clicking the button on the Transaction paragraph. This will populate the Transaction Date and open the fields.
- Select the Transaction Type **RECEIVE** from the dropdown.
- Enter the quantity.
- Enter the Begin Number, tab to the End Number. *The system will populate the End Number based on the quantity amount.*
- Click the button. The paper received will appear in the Available in Stock and the Transaction Detail section.

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 500 | 7000001 | 7000500 | 420551 |

1 - 1 of 1 items

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 11/05/2020 | Receive | 500 | 7000001 | 7000500 | |

1 - 1 of 1 items

Transaction

Clear Transaction Transaction Date: 11/05/2020

Create Inventory Transaction Notes:

Transaction Type: **SPLIT-ALL-TO-STOCK**

Quantity: 0 Begin Number: 0 End Number: 0

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 500 | 7000001 | 7000500 | 420551 |

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 11/05/2020 | Receive | 500 | 7000001 | 7000500 | |

Next is to split the received papers to have it available in stock to print.

- Click button.
- Enter the "Transaction Type", Split-All-To Stock.
- Then in the Available in Stock section, click on the line for the paper received in stock. *This will auto-fill the the quantity and the begin and end number into the Transaction fields.*
- Click the button. All the paper in the Available in Stock has been split and will show as individual lines.

Available In Stock/Transaction Details

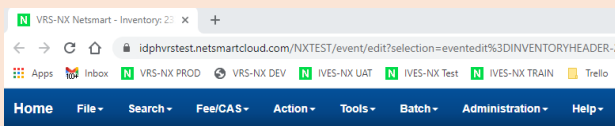
Available In Stock

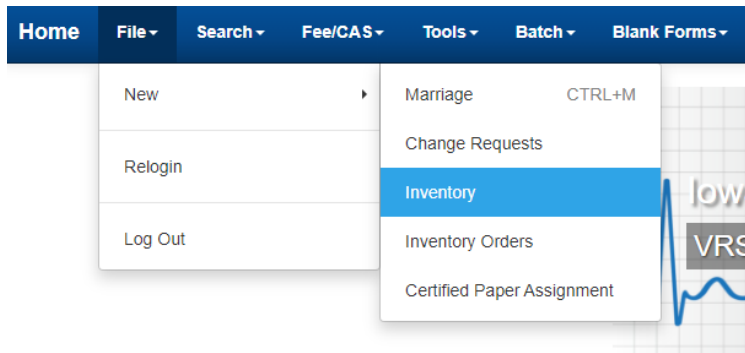
| Item | Quantity | Start | End | StockID |
|-----------------------|----------|-----------|-----------|---------|
| State Certified Paper | 1 | 888000001 | 888000001 | 417022 |
| State Certified Paper | 1 | 888000002 | 888000002 | 417023 |
| State Certified Paper | 1 | 888000003 | 888000003 | 417024 |
| State Certified Paper | 1 | 888000004 | 888000004 | 417025 |
| State Certified Paper | 1 | 888000005 | 888000005 | 417026 |
| State Certified Paper | 1 | 888000006 | 888000006 | 417027 |

Transaction Details

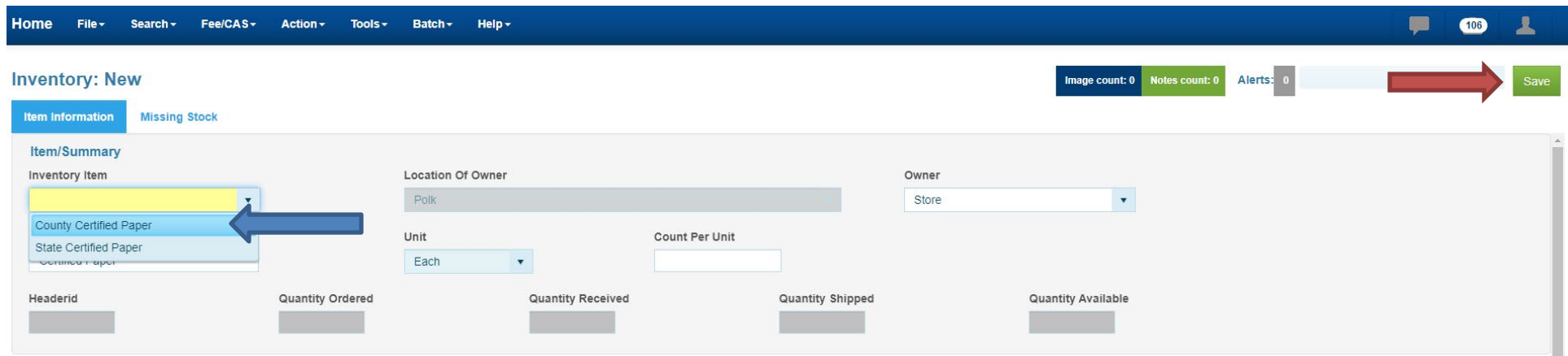
| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|--------------------|----------|-----------|-----------|-------|
| State Certified Paper | 10/12/2020 | Receive | 500 | 888000001 | 888000500 | |
| State Certified Paper | 10/12/2020 | Split-All-To-Stock | 500 | 888000001 | 888000500 | |

- Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.





To enter NEW County Paper inventory
From the main menu, click **File > New > Inventory**



Click on the drop down arrow under **ITEM**, and click **County Certified Paper**. ←

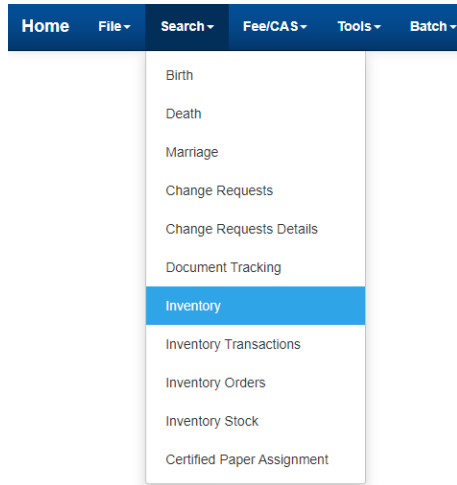
→ Click **SAVE** - Receive pop up message – Click **OK** and repeat the same steps as described above.

Message from webpage

The record saved successfully.

Ok

Adding Safety Paper to Existing Inventory Store



On the Home page, click Search > Inventory

Search (Inventory)

Search Criteria Search Result

Item:

Location of Owner:

Owner:

© 2020 Netsmart Technologies, Inc. [Back to top](#)

In the "Item" field, choose the type of paper and click the button.

Search (Inventory)

Search Criteria Search Result

Images: 0 Notes: 0

Group By:

| Item | Location of Owner | Owner | Category | On Hand | Headerid | Isactive | # of Images | # of Notes |
|-----------------------|-------------------|-------|---------------------|---------|----------|----------|-------------|------------|
| State Certified Paper | Polk | Store | Certified Paper | 1500 | 531 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 533 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 535 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | 500 | 536 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 537 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 539 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 540 | T | 0 | 0 |
| State Certified Paper | Polk | Store | 888800001-888800500 | 500 | 542 | T | 0 | 0 |

1 - 8 of 8 items

The results will show a grid of the inventory store(s). Double click on the store OR click the button to open the inventory store.

Item Information Missing Stock System

Item/Summary

Inventory Item: State Certified Paper Location of Owner: Polk Owner: STORE

General Category: Unit: Each Count per unit:

Headerid: 2201 Quantity Ordered: 0 Quantity Received: 2017 Quantity Shipped: 0 Quantity Available: 7

Transaction

Clear Transaction: Clear Transaction Transaction Date: 02/15/2021 Transaction Type: **RECEIVE** Quantity: 0 Begin Number: 0 End Number: 0

Create Inventory Transaction: Create Inventory Transaction Notes:

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 3562983 | 3562983 | 2822483 |

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 11/16/2020 | USE | 1 | 3564000 | 3564000 | D Dea |

Adding the "Receive" safety paper shipment

- Clicking the **Clear Transaction** button on the Transaction paragraph. This will populate the Transaction Date and open the fields.
- Select the Transaction Type **RECEIVE** from the dropdown.
- Enter the quantity.
- Enter the Begin Number, tab to the End Number. *The system will populate the End Number based on the quantity amount.*
- Click the **Create Inventory Transaction** button. The paper received will appear in the Available in Stock and the Transaction Detail section.

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 3563065 | 3563065 | 2809306 |
| State Certified Paper | 1 | 3563066 | 3563066 | 2809307 |
| State Certified Paper | 1 | 3563594 | 3563594 | 2809835 |
| State Certified Paper | 1 | 3563595 | 3563595 | 2809836 |
| State Certified Paper | 1 | 3563596 | 3563596 | 2809837 |
| State Certified Paper | 500 | 7000501 | 7001000 | 2930910 |

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 02/15/2021 | Receive | 500 | 7000501 | 7001000 | |
| State Certified Paper | 11/16/2020 | USE | 1 | 3564000 | 3564000 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563999 | 3563999 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563998 | 3563998 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563997 | 3563997 | D Dea |

Transaction

Clear Transaction: Transaction Date: 02/15/2021

Create Inventory Transaction: Notes:

Transaction Type: **SPLIT-ALL-TO-STOCK**

Quantity: 0 Begin Number: 0 End Number: 0

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 3563065 | 3563065 | 2809306 |
| State Certified Paper | 1 | 3563066 | 3563066 | 2809307 |
| State Certified Paper | 1 | 3563594 | 3563594 | 2809835 |
| State Certified Paper | 1 | 3563595 | 3563595 | 2809836 |
| State Certified Paper | 1 | 3563596 | 3563596 | 2809837 |
| State Certified Paper | 500 | 7000501 | 7001000 | 2930910 |

1 - 10 of 10 items

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 02/15/2021 | Receive | 500 | 7000501 | 7001000 | |
| State Certified Paper | 11/16/2020 | USE | 1 | 3564000 | 3564000 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563999 | 3563999 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563998 | 3563998 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563997 | 3563997 | D Dea |

1 - 2022 of 2022 items

Next is to split the received papers to have it available in stock to print.

- Click button.
- Enter the "Transaction Type", Split-All-To Stock.
- Then in the Available in Stock section, click on the line for the paper received in stock. *This will auto-fill the the quantity and the begin and end number into the Transaction fields.*
- Click the button. All the paper in the Available in Stock has been split and will show as individual lines.

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 3563065 | 3563065 | 2809306 |
| State Certified Paper | 1 | 3563594 | 3563594 | 2809835 |
| State Certified Paper | 1 | 3563595 | 3563595 | 2809836 |
| State Certified Paper | 1 | 3563596 | 3563596 | 2809837 |
| State Certified Paper | 1 | 7000501 | 7000501 | 2930911 |
| State Certified Paper | 1 | 7000502 | 7000502 | 2930912 |

1 - 500 of 500 items

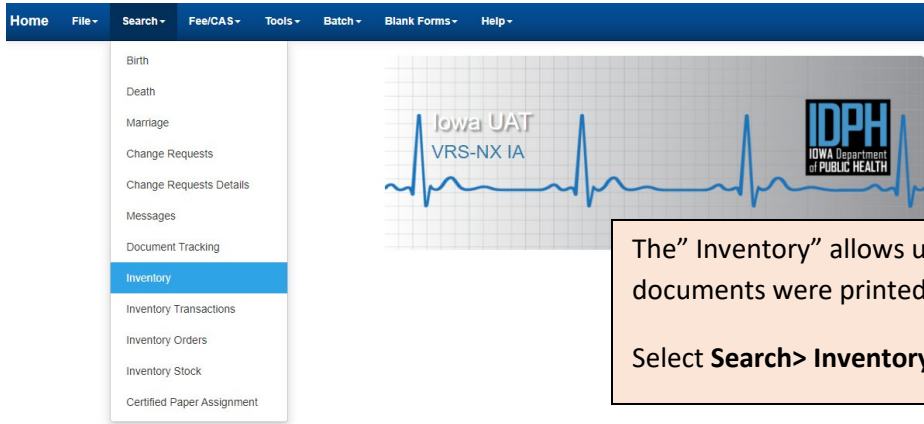
Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|--------------------|----------|---------|---------|-------|
| State Certified Paper | 02/15/2021 | Split All To Stock | 500 | 7000501 | 7001000 | |
| State Certified Paper | 02/15/2021 | Receive | 500 | 7000501 | 7001000 | |
| State Certified Paper | 11/16/2020 | USE | 1 | 3564000 | 3564000 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563999 | 3563999 | D Dea |
| State Certified Paper | 11/16/2020 | USE | 1 | 3563998 | 3563998 | D Dea |

1 - 2023 of 2023 items

- Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Damaging Spoiled Safety Paper



The "Inventory" allows users to monitor what documents were printed, restocked or damaged.
 Select **Search> Inventory** from the Menu.

Search (Inventory)

Search Criteria Search Result

Item: **Search**

Location of Owner: **Clear** **Search**

Owner: **Clear** **Search**

Headerid:

On Hand:

In the "Item" field, choose the type of paper and click the **Search** button.

© 2020 Netsmart Technologies, Inc.

[Back to top](#)

Search (Inventory)

Search Criteria Search Result

Flat View Export - Images: 0 Notes: 0 Display

Group By:

| Item | Location of Owner | Owner | Category | On Hand | Headerid | Isactive | # of Images | # of Notes |
|-----------------------|-------------------|-------|--------------------|---------|----------|----------|-------------|------------|
| State Certified Paper | Polk | Store | Certified Paper | 1500 | 531 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 533 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 535 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | 500 | 536 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 537 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 539 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 540 | T | 0 | 0 |
| State Certified Paper | Polk | Store | 88880001-888800500 | 500 | 542 | T | 0 | 0 |

1 - 8 of 8 items

The results will show a grid of the inventory store(s).
 Double click on the store OR click the **Display** button to open the inventory store.

Marking “Available” Paper as DAMAGED

Transaction

Clear Transaction Transaction Date: 12/02/2020 Transaction Type: Quantity: 0 Begin Number: 0 End Number: 0

Create Inventory Transaction Notes:

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 1334037 | 1334037 | 418076 |
| State Certified Paper | 1 | 1334038 | 1334038 | 418077 |
| State Certified Paper | 1 | 1334039 | 1334039 | 418078 |
| State Certified Paper | 1 | 1334040 | 1334040 | 418079 |
| State Certified Paper | 1 | 1334041 | 1334041 | 418080 |
| State Certified Paper | 1 | 1334042 | 1334042 | 418081 |

1 - 464 of 464 items

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 12/02/2020 | Use | 1 | 1334032 | 1334032 | |
| State Certified Paper | 12/02/2020 | Use | 1 | 1334033 | 1334033 | |
| State Certified Paper | 12/02/2020 | Use | 1 | 1334034 | 1334034 | |
| State Certified Paper | 12/02/2020 | Use | 1 | 1334035 | 1334035 | |
| State Certified Paper | 12/02/2020 | Use | 1 | 1334036 | 1334036 | |

1 - 48 of 48 items

If the paper is still in the Available in Stock Grid:

1. Click the **Clear Transaction** button.
2. Choose **DAMAGED** for the “Transaction Type”.
3. Click on the safety paper from the Available in Stock section. *This will auto-fill the quantity, begin number and end number into the field.*
4. Click the **Create Inventory Transaction** button. The Transaction Detail Grid will reflect the Damaged action.

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 1334038 | 1334038 | 418077 |
| State Certified Paper | 1 | 1334039 | 1334039 | 418078 |
| State Certified Paper | 1 | 1334040 | 1334040 | 418079 |
| State Certified Paper | 1 | 1334041 | 1334041 | 418080 |
| State Certified Paper | 1 | 1334042 | 1334042 | 418081 |
| State Certified Paper | 1 | 1334043 | 1334043 | 418082 |

1 - 463 of 463 items

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 12/02/2020 | Use | 1 | 1334033 | 1334033 | |
| State Certified Paper | 12/02/2020 | Use | 1 | 1334034 | 1334034 | |
| State Certified Paper | 12/02/2020 | Use | 1 | 1334035 | 1334035 | |
| State Certified Paper | 12/02/2020 | Use | 1 | 1334036 | 1334036 | |
| State Certified Paper | 12/02/2020 | Damaged | 1 | 1334037 | 1334037 | |

1 - 49 of 49 items

5. Click the ‘X’ on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Marking "USED" paper as DAMAGED

Transaction

Clear Transaction: Transaction Date: Transaction Type: Quantity: Begin Number: End Number:

Create Inventory Transaction: Notes:

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 1334039 | 1334039 | 418078 |
| State Certified Paper | 1 | 1334040 | 1334040 | 418079 |
| State Certified Paper | 1 | 1334041 | 1334041 | 418080 |
| State Certified Paper | 1 | 1334042 | 1334042 | 418081 |
| State Certified Paper | 1 | 1334043 | 1334043 | 418082 |
| State Certified Paper | 1 | 1334044 | 1334044 | 418083 |

Transaction Details

| Item | Date | Transaction | Quantity | Start ↑ | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|---------|
| State Certified Paper | 11/04/2020 | Use | 1 | 1334012 | 1334012 | |
| State Certified Paper | 11/04/2020 | Use | 1 | 1334013 | 1334013 | |
| State Certified Paper | 11/04/2020 | Use | 1 | 1334014 | 1334014 | |
| State Certified Paper | 11/04/2020 | Use | 1 | 1334015 | 1334015 | |
| State Certified Paper | 11/03/2020 | USE | 1 | 1334016 | 1334016 | B Birth |

If the paper appears in the Transaction Details Grid:

1. Click the button.
2. Enter **DAMAGED** for the "Transaction Type"
3. Enter the Quantity, Begin Number, and End Number.
4. Click the button. The damaged paper now shows in the Transaction Detail Grid.

Available In Stock/Transaction Details

Available In Stock

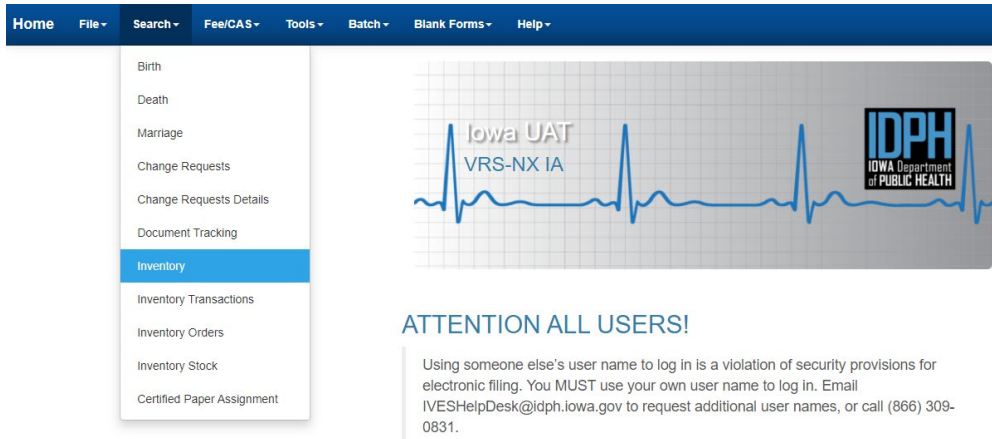
| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 1334039 | 1334039 | 418078 |
| State Certified Paper | 1 | 1334040 | 1334040 | 418079 |
| State Certified Paper | 1 | 1334041 | 1334041 | 418080 |
| State Certified Paper | 1 | 1334042 | 1334042 | 418081 |
| State Certified Paper | 1 | 1334043 | 1334043 | 418082 |
| State Certified Paper | 1 | 1334044 | 1334044 | 418083 |

Transaction Details

| Item | Date | Transaction | Quantity | Start ↑ | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|-------|
| State Certified Paper | 11/04/2020 | Use | 1 | 1334012 | 1334012 | |
| State Certified Paper | 11/04/2020 | Use | 1 | 1334013 | 1334013 | |
| State Certified Paper | 11/04/2020 | Use | 1 | 1334014 | 1334014 | |
| State Certified Paper | 12/02/2020 | Damaged | 1 | 1334014 | 1334014 | |
| State Certified Paper | 11/04/2020 | Use | 1 | 1334015 | 1334015 | |

5. Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Restocking Paper



Restocking paper is a **Two- Step process**.
 To restock paper that has not been printed on, but IVES marked it as USED. The paper must be VOIDED and then RESTOCKED.
 Select **Search> Inventory** from the Menu.

Search (Inventory)

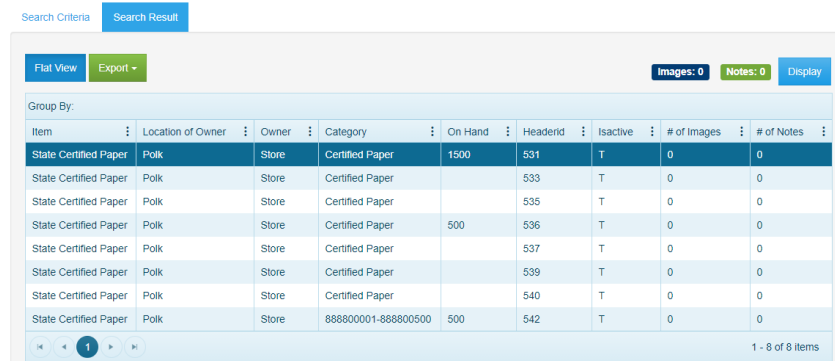


In the "Item" field, choose the type of paper and click the **Search** button.

© 2020 Netsmart Technologies, Inc.

[Back to top](#)

Search (Inventory)



| Item | Location of Owner | Owner | Category | On Hand | Headerid | Isactive | # of Images | # of Notes |
|-----------------------|-------------------|-------|--------------------|---------|----------|----------|-------------|------------|
| State Certified Paper | Polk | Store | Certified Paper | 1500 | 531 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 533 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 535 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | 500 | 536 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 537 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 539 | T | 0 | 0 |
| State Certified Paper | Polk | Store | Certified Paper | | 540 | T | 0 | 0 |
| State Certified Paper | Polk | Store | 88880001-888800500 | 500 | 542 | T | 0 | 0 |

The results will show a grid of inventory store(s).
 Double click on the Header store OR click the **Display** button to open the inventory store.

Transaction

Clear Transaction Transaction Date: 11/09/2020 Transaction Type: [Dropdown] Quantity: 0 Begin Number: 0 End Number: 0

Create Inventory Transaction Notes: [Text Field]

Transaction

Clear Transaction Transaction Date: 11/04/2020 Transaction Type: USE Quantity: 1 Begin Number: 8800001 End Number: 8800001

VOID TRANSACTION Notes: [Text Field]

Available In Stock/Transaction Details

1st Step – VOID Paper

1. Click the button in the Transaction paragraph.
2. Then go to the Transaction Details section, highlight and click on the USE safety paper of the grid. The system will auto-fill the Transaction Type, Quantity, Begin Number and End Number field.
3. Notice the subtitle changed from “Create Inventory Transaction” to “VOID TRANSACTION”. Click the button.
4. A confirmation pop-up message to VOID the transaction will appear. Click the button.
5. The Transaction Detail section now reflects the safety paper as VOID.

Repeat this process if there are multiple papers to be voided.

Transaction Details

| Item | Date | Transaction | Quantity | Start ↑ | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|---------|
| State Certified Paper | 11/04/2020 | USE | 1 | 8800001 | 8800001 | B Birtl |
| State Certified Paper | 11/05/2020 | USE | 1 | 8800002 | 8800002 | B Birtl |
| State Certified Paper | 11/05/2020 | USE | 1 | 8800003 | 8800003 | B Birtl |
| State Certified Paper | 11/06/2020 | USE | 1 | 8800004 | 8800004 | B Birtl |
| State Certified Paper | 11/09/2020 | USE | 1 | 8800005 | 8800005 | B Birtl |

1 - 12 of 12 items

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|---------|
| State Certified Paper | 11/04/2020 | VOID | 1 | 8800001 | 8800001 | B Birtl |
| State Certified Paper | 11/05/2020 | USE | 1 | 8800002 | 8800002 | B Birtl |
| State Certified Paper | 11/05/2020 | USE | 1 | 8800003 | 8800003 | B Birtl |
| State Certified Paper | 11/06/2020 | USE | 1 | 8800004 | 8800004 | B Birtl |
| State Certified Paper | 11/09/2020 | USE | 1 | 8800005 | 8800005 | B Birtl |

1 - 12 of 12 items

Inventoryheader: 551 Image count: 0 Notes count: 0 Alerts: 0 Save

Item Information Missing Stock

| Headerid | Quantity Ordered | Quantity Received | Quantity Shipped | Quantity Available |
|----------|------------------|-------------------|------------------|--------------------|
| 551 | 0 | 501 | 0 | 493 |

Transaction

Clear Transaction Transaction Date Transaction Type Quantity Begin Number End Number

Clear Transaction 11/09/2020 RESTOCK 1 8800001 8800001

Create Inventory Transaction Notes

Create Inventory Transaction

Available In Stock/Transaction Details

Available In Stock

| Item | Quantity | Start | End | StockID |
|-----------------------|----------|---------|---------|---------|
| State Certified Paper | 1 | 8800001 | 8800001 | 421057 |
| State Certified Paper | 1 | 8800010 | 8800010 | 419555 |
| State Certified Paper | 1 | 8800011 | 8800011 | 419556 |
| State Certified Paper | 1 | 8800012 | 8800012 | 419557 |
| State Certified Paper | 1 | 8800013 | 8800013 | 419558 |
| State Certified Paper | 1 | 8800014 | 8800014 | 419559 |

1 - 492 of 492 Items

Display

Transaction Details

| Item | Date | Transaction | Quantity | Start | End | Notes |
|-----------------------|------------|-------------|----------|---------|---------|--------|
| State Certified Paper | 11/04/2020 | VOID | 1 | 8800001 | 8800001 | B Birt |
| State Certified Paper | 11/05/2020 | USE | 1 | 8800002 | 8800002 | B Birt |
| State Certified Paper | 11/05/2020 | USE | 1 | 8800003 | 8800003 | B Birt |
| State Certified Paper | 11/06/2020 | USE | 1 | 8800004 | 8800004 | B Birt |
| State Certified Paper | 11/09/2020 | USE | 1 | 8800005 | 8800005 | B Birt |

1 - 13 of 13 Items

Display

2nd Step – Restock Paper

1. Click the Clear Transaction button in the Transaction paragraph.
2. Enter **RESTOCK** for the “Transaction Type”.
3. Enter the Quantity, Begin Number and End Number into the fields.
4. Click the Create Inventory Transaction button. The safety paper is now restocked in the Available in Stock section.
5. Click on the browser tab to close out of inventory.

Transaction

Clear Transaction Transaction Date Transaction Type Quantity Begin Number End Number

Clear Transaction 10/12/2020 RESTOCK 4 880000003 880000006

Create Inventory Transaction Notes

Create Inventory Transaction

Restock Multiple Papers

After VOIDING each individual paper:

1. Click the **Clear Transaction** button in the Transaction paragraph.
2. Enter **RESTOCK** for the "Transaction Type"
3. Enter the Quantities, Begin Number and End Number into the fields.
4. Click the **Create Inventory Transaction** button. The multiple safety papers are now restocked in the Available in Stock section.

Transaction

Clear Transaction Transaction Date Transaction Type Quantity Begin Number End Number

Clear Transaction 10/12/2020 SPLIT-ALL-TO-STOCK 4 880000003 880000006

Create Inventory Transaction Notes

Create Inventory Transaction

Available In Stock/Transaction Details

Available In Stock

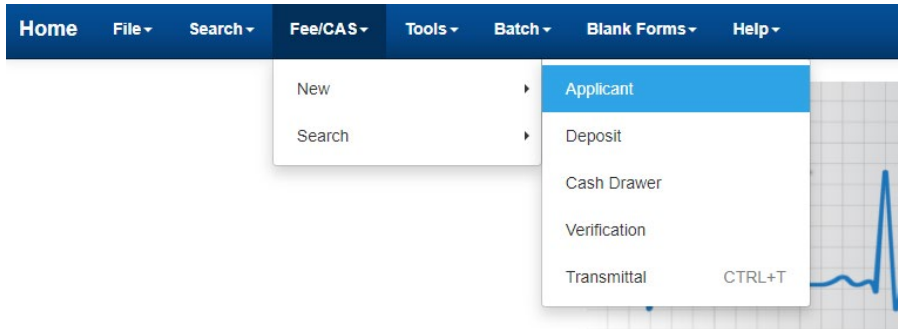
| Item | Quantity | Start | End | StockID |
|------------------------|----------|-----------|-----------|---------|
| County Certified Paper | 4 | 880000003 | 880000006 | 418032 |
| County Certified Paper | 1 | 880000007 | 880000007 | 417537 |
| County Certified Paper | 1 | 880000008 | 880000008 | 417538 |
| County Certified Paper | 1 | 880000009 | 880000009 | 417539 |
| County Certified Paper | 1 | 880000010 | 880000010 | 417540 |
| County Certified Paper | 1 | 880000011 | 880000011 | 417541 |

Transaction Details

| Item | Date | Transaction |
|------------------------|------------|-------------|
| County Certified Paper | 10/12/2020 | VOID |
| County Certified Paper | 10/12/2020 | VOID |
| County Certified Paper | 10/12/2020 | VOID |
| County Certified Paper | 10/12/2020 | VOID |
| County Certified Paper | 10/12/2020 | VOID |
| County Certified Paper | 10/12/2020 | Restock |

5. Click **Clear Transaction** button.
6. Enter the "Transaction Type, **Split-All-To Stock**.
7. Then in the Available in Stock section, highlight and click on the multiple papers available in stock. *This will auto-fill the the quantity and the begin and end number back into the Transaction fields.*
8. Click the **Create Inventory Transaction** button. All the paper in the Available in Stock has been split.
9. Click on the browser tab to close out of inventory.

New Applications for Fee Purposes



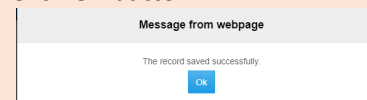
These will be vital records that users print on certified paper.

On the Home Page, click **Fee/CAS > New > Applicant**

A screenshot of the 'Applicant: New' form in a web application. The form is divided into several sections: 'Application Status', 'Applicant Information', and 'Financials'. The 'Application Status' section includes fields for 'Applicant Number', 'Date Of Application' (02/08/2021), 'Application Type' (dropdown), 'Assigned To Queue' (dropdown), 'Priority' (NORMAL), and 'Order/Tracking Number'. The 'Applicant Information' section includes fields for 'First Name', 'Middle Name', 'Last Name', 'Country' (United States), 'State Name' (Iowa), 'City', 'Address 2', 'Zipcode', 'Phone - Primary', and 'Fax - If Applicable'. There is a checkbox for 'Is Applicant Address Same As Mailing?' which is checked. The 'Financials' section shows 'Total \$ Charged' (\$0.00), 'Total \$ Paid' (\$0.00), and 'Amount Due' (\$0.00). A 'Save' button is visible in the top right corner of the form.

Application tab:

- Enter the Application Type, the Identification and the Date Received.
- Tab to the Applicant Information paragraph, enter the First Name, Last Name and mailing address.
- Click the **Save** button.
- The dialog message appears, "The record saved successfully". Click Ok button.



[Application](#) | [Request to Inventory](#) | [Mailing](#) | [Billing](#) | [Reassign Request](#) | [Flags](#) | [Return & Notes](#) | [Marriage Returns](#)

Name: Sam | Testing | Address 1: 12 Street | City: Waukee | State Name: Iowa | Zipcode: 50263 | Country: United States

Applicant Address Same As Mailing?

Total \$ Charged: \$0.00 | Total \$ Paid: \$0.00 | Amount Due: \$0.00

Payment Information

| Payment Date | Payment Type | Check Num | Amount | Applicant ID | Payment ID | Modify Date | Create Date | Retur... |
|---------------------|--------------|-----------|--------|--------------|------------|-------------|-------------|----------|
| No items to display | | | | | | | | |

Initialize Payment | Add Payment

Adding Payment

If processing a FREE VA, an exchange or a NO Fee certificate, there is no payment to enter. Skip this step.

- Click the **Initialize Payment** button. The Payment Date will pre-populate. It also change the button to “Clear Payment Fields”.
- Enter the Payment Amount
- Choose the Payment Type, enter Check Number (if applicable).
- Click the **Add New Payment** button. The payment grid will reflect the payment.

If there are two payments for one application, the payment must be entered as one item.

Applicant: 1258073

Image count: 0

Notes count: 0

Alerts: 0

Save

Application Request to Inventory Mailing Billing Reassign Request Flags Return & Notes Marriage Returns

Request Information

Initialize Request Fields

Initialize Request Fields

Event Type

Event State File Number

Event Begin Date

Event End Date

Purpose Type

Relationship

First Name

Middle Name

Last Name

Suffix

Request Status Type

Add New Request

Add New Request

Request to Inventory Tab

Next add the **Request Information**. Click the **Initialize Request Fields** button, this will clear and open the fields. It also change the button to "Clear Request Fields".

Enter the following:

- Event Type
- Event Begin Date
- Event End Date (if different from begin date)
- Purpose Type
- Relationship *(If the relationship is "self" the system will auto-fill the name of the applicant from the application)*
- First, Middle (if applicable) and Last Name.

Note: If the State File Number is available, enter it and the system will auto-fill the Event Date, First, Middle (if applicable) and Last Name.

Click the **Add New Request** button. The request will populate in the grid on the REQUESTS Section on the bottom of the page.

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1357324 | Birth | Copper | | Nichols |

Display

Service Information

Initialize Service Fields

Initialize Service Fields

Service Type Fee Type Copies Status Cost \$0.00

Add New Service

Add New Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377263 | BIRTH | Sam | | Nichols |

Display

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C. |
|-----------|------------|--------------|----------|--------|---------|--------|----|
| 0 | | | | | | | |

Display

Search To Print Event Record

Search To Print Event Record

Inventory Begin #

Inventory End #

Use Inventory

Use Inventory



Next add the **Service Information**.

Click the **Initialize Service Fields** button. This will clear and open the fields. It also change the button to "Clear Service Fields".

Enter the following:

- Service Type
- Fee Type
- Number of Copies

Click the **Add New Service** button. The service will populate in the grid on the SERVICE Section on the bottom of the page.

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C. |
|-----------|------------|----------------|----------|--------|----------|---------|----|
| 1377263 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | PENDING | Y |

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377263 | BIRTH | Sam | | Nichols |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|---------|------|
| 1377263 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | PENDING | Y |

Search To Print Event Record

Inventory Begin #

Inventory End #

Use Inventory

IVES CERTIFICATES

Services on a birth, death or marriage available in IVES (see Guidelines to Printing Certified Copies located on the VR Portal).

On the Requests/Service/Inventory Information paragraph:

- Click on the correct REQUESTS grid one time.
- Click on the correct SERVICES grid one time.
- Click the **Search To Print Event Record** button.

Linking: Event Search BIRTH

Search Criteria Search Result

Flat View Export

Images: **Display**

Group By:

| SFN | Child's First | Child's Middle | Child's Last | Child's Suffix | Child DOB | County of Birth | Mother's First | Mother's Last |
|------------|---------------|----------------|--------------|----------------|------------|-----------------|----------------|---------------|
| 2021000044 | Copper | | Nichols | | 01/01/2021 | Polk | Silver | Nichols |

1 - 1 of 1 items

The Search result grid for the event appears. Click the **Display** button or double click on the grid to open the record.

DO NOT PRINT FROM THE SEARCH SCREEN.

Home File Search Documents Fee/CAS Action Tools Batch Administration Help

Documents Documents Documents

B Birth Certificate COUNTY

B Plain Paper Copy

Birth: 3034689

Child Mother Mother pg 3 Spouse Fees & Compensation

System

| State File Number | Date Created | Date Modified |
|-------------------|--------------|---------------|
| 2021000044 | 02/08/2021 | 02/08/2021 |

On the event, select **Documents > Documents > Certificate type of document should appear.**


Note – if the record was not found, check the requested information fields to ensure the information is entered correctly. This may also require to change the search criteria.

1 / 1 100% Send Email

STATE OF IOWA
Iowa Department of Public Health
CERTIFICATE OF LIVE BIRTH
114-2021-000044

| | | |
|------------|--|---|
| REGISTRANT | 1A. FIRST NAME Copper | 2. DATE OF BIRTH 01/01/2021 |
| | 1B. MIDDLE NAME, if any | 3. TIME OF BIRTH 08:00 AM |
| | 1C. LAST NAME (SURNAME) Nichols | 4. GENDER Male |
| | 1E. SUFFIX, if any | 5. COUNTY OF BIRTH Polk |
| | 7. FACILITY OF BIRTH (OR STREET ADDRESS) MercyOne Des Moines Medical Center | 6. DATE FILED BY REGISTRAR 02/08/2021 |
| | | 8. CITY, TOWN, OR LOCATION OF BIRTH Des Moines |

The certificate will appear. If the record is an image, you must crop the image by following the instructions found on [page 57](#).

In the top right corner, click the  icon.

Print 1 sheet of paper

Destination HP LaserJet Professional

Pages All

Copies 1

More settings

STATE OF IOWA
Iowa Department of Public Health
CERTIFICATE OF LIVE BIRTH
114-2021-000044

| | | |
|------------|--|---|
| REGISTRANT | 1A. FIRST NAME Copper | 2. DATE OF BIRTH 01/01/2021 |
| | 1B. MIDDLE NAME, if any | 3. TIME OF BIRTH 08:00 AM |
| | 1C. LAST NAME (SURNAME) Nichols | 4. GENDER Male |
| | 1E. SUFFIX, if any | 5. COUNTY OF BIRTH Polk |
| | 7. FACILITY OF BIRTH (OR STREET ADDRESS) MercyOne Des Moines Medical Center | 6. DATE FILED BY REGISTRAR 02/08/2021 |
| | | 8. CITY, TOWN, OR LOCATION OF BIRTH Des Moines |

NO NOTATIONS

This is to certify that this is a true and correct reproduction of the original record as recorded in this state. Issued under the authority of Chapter 144, Code of Iowa.
This copy is not valid unless prepared on registered bonded, depending on the use and signature of the Registrar or Designer.

THIS COPY NOT VALID UNLESS UNALTERED AND PREPARED ON CERTIFIED SECURITY PAPER

02/08/2021
DATE ISSUED

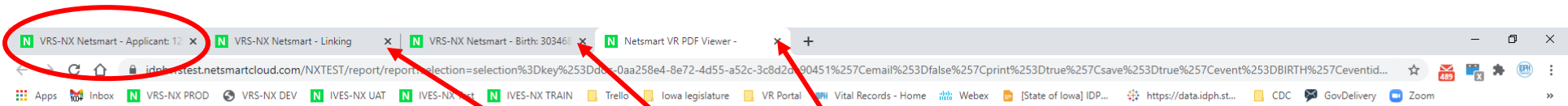
Bronze
COUNTY REGISTRAR
County of Insurance: Page

[Signature]
DEPUTY STATE REGISTRAR

Print Cancel

The printer dialog box will appear. *This dialog box is specific to general printing and all printers should be available.*

- Choose the correct printer from the Destination field.
- Enter the number of copies requested.
- If applicable* choose additional settings based on YOUR PRINTER set up.
- Click the **Print** button.



VR Document Service

1 / 1 | 100% +

Send Email

STATE OF IOWA
Iowa Department of Public Health
CERTIFICATE OF LIVE BIRTH

114-2021-000044

| | | |
|--|----------------------------|---|
| 1a. FIRST NAME Copper | | 2. DATE OF BIRTH 01/01/2021 |
| 1b. MIDDLE NAME, if any | | 3. TIME OF BIRTH 00:00 AM |
| 1c. LAST NAME (SURNAME) Nichols | | 4. GENDER Male |
| 1d. SUFFIX, if any | 5. COUNTY OF BIRTH Polk | 6. DATE FILED BY REGISTRAR 02/08/2021 |
| 7. FACILITY OF BIRTH (OR STREET ADDRESS) MercyOne Des Moines Medical Center | | 8. CITY, TOWN, OR LOCATION OF BIRTH Des Moines |
| 9a. CURRENT LEGAL FIRST NAME AND MIDDLE NAME Silver | | 9b. CURRENT LEGAL LAST NAME, SUFFIX Nichols |
| 10a. FIRST NAME AND MIDDLE NAME PRIOR TO ANY MARRIAGE Silver | | 10b. LAST NAME, SUFFIX PRIOR TO ANY MARRIAGE Moon |
| 11. STATE OF RESIDENCE Iowa | | 12. COUNTY OF RESIDENCE Dallas |
| 13. BIRTHPLACE Iowa | | 14. DATE OF BIRTH (OR AGE) 05/04/1996 |
| 15a. CURRENT LEGAL FIRST NAME AND MIDDLE NAME Bronze | | 15b. CURRENT LEGAL LAST NAME, SUFFIX Nichols |
| 16a. FIRST NAME and MIDDLE NAME PRIOR TO ANY MARRIAGE Bronze | | 16b. LAST NAME, SUFFIX PRIOR TO ANY MARRIAGE Nichols |
| 17. BIRTHPLACE Iowa | | 18. DATE OF BIRTH (OR AGE) 05/04/1994 |

REGISTRAR

MOTHER

FATHER

NO NOTATIONS

Once the record is printed, close all the tabs to get back to the **Applicant** tab to enter the safety paper number and complete the application.

Relationship: Mother / Parent 1 | First Name: Copper | Middle Name: | Last Name: Nichols | Suffix: | Request Status Type: PENDING

Update Request

Service Information

Clear Service Fields: | Service Type: Certified Copy | Fee Type: Standard | Copies: 1 | Cost: \$15.00 | Status: PENDING

Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1357324 | Birth | Copper | | Nichols |

SERVICES

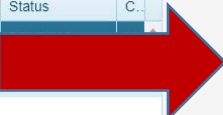
| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|--------|------|
| 1357324 | Birth | Certified Copy | Standard | 1 | \$ 15.00 | | |

Search To Print Event Record

Inventory Begin #

Inventory End #

Use Inventory



- On the **Request to Inventory** tab:
- On the bottom right of the Requests/Services/Inventory Information paragraph:
- Enter the first piece of security paper number in the Inventory Begin # field.
 - Enter the last piece of security paper number in the Inventory End # field. *If it is one piece of paper, enter the same number in each field.*
 - Click the button. *The service grid will be marked as COMPLETED.*
 - Change the Request Status Type to COMPLETED
 - Click the button.
 - Click on the Application tab.

VRS-NX Netsmart - Applicant: 12148

qavrstest.netsmartcloud.com/WebSvcIA_3/event/edit?selection=eventedit%3DAPPLICANT-12148-preload%2541fcd7cef313407bb09f7f8ed3ea4ec2&key=__key=id%3DwtMHWPYuqOgLd2qJFYp5yQdVT8i...

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Applicant: 12148 Image count: 0 Notes count: 0 Alerts: 0 Save

Application Request & Service Mailing Billing Reassign Request Flags Return & Notes Marriage Returns

Application Status

| | | | | |
|--------------------------------------|------------------------------------|---------------------------------|------------------------------|---------------------------------|
| Applicant Number 12148 | *Date Of Application 11/03/2020 | *Application Type COUNTER | Assigned To Queue | Priority Normal |
| Identification power attorney par | Date Received 11/03/2020 | Application Status Completed | Date Completed 11/05/2020 | Completed By Nichols, Sammui |

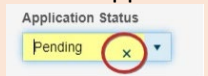
Applicant Information

| | | | |
|-----------------------|-------------|-----------------------|--------------------------|
| *First Name Silver | Middle Name | *Last Name Nichols | Country United States |
| State Name Iowa | City | Address 1 | Zipcode |

In order to complete the transaction in full, the user is required to manually change the status of the application.

On the **Application** tab

- On the Application Status field change the status from "Pending" to "Completed". Be sure to click the X on the field in order to see all options



- Enter the date in the Date Completed field.
- Click the Save button. The system will auto-fill in the name of the person who completed the application.
- Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Home File Search Documents Fee/CAS Action Linking Tools Batch Administration Help

Applicant: 1276798

Documents

- Cover Letter
- Cover/Receipt
- No Entitlement Letter
- Non-IVES Certificate(s)**
- Notice of Record Search
- R Service Location Update
- Receipt
- Return Letter

Image count: 0 Notes count: 0 Alerts: 0 Save

Application Request to Inventory Mailing Billing

Update Request

Update Request

Service Information

Clear Service Fields

Clear Service Fields

Service Type

Certified Copy

Fee Type

Standard

Copies

1

Status

PENDING

Cost

\$15.00

Update Service

Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377239 | BIRTH | Copper | | Nichols |

SEARCH...

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|---------|------|
| 1377239 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | PENDING | Y |

SEARCH...

Search To Print ~~Event Record~~

Search To Print Event Record

Inventory Begin #

Inventory End #

Use Inventory

Use Inventory

NON-IVES CERTIFICATES

If the request is for a birth, death or marriage record that is **NOT available in IVES** (see Guidelines to Printing Certified Copies located on the VR Portal), the user would **not** select the **Search To Print Event Record** button.

Instead simply print the documents using the County Safety Paper and select the **Documents > Documents > Non-IVES Certificate(s)** from the menu and follow the steps on page 26 & 27 for using inventory paper and completing the application.

Multiple Requests

If there are multiple requests from the same applicant, **repeat the process request and service process, starting on page 21.**

The grid will populate accordingly. Each request and service is tied by the **Request ID.**

Make sure that the correct Request line and Service line is highlighted in the Request/Service Information grid before you search for the event record.

Applicant: 1276798

Image count: 0 Notes count: 0 Alerts: 0 Previous Event Save

Application **Request to Inventory** Mailing Billing Reassign Request Flags Return & Notes Marriage Returns

Service Information

Clear Service Fields

Clear Service Fields

Service Type

Certified Copy

Fee Type

Standard

Copies

1

Status

COMPLETED

Cost

\$15.00

Update Service

Update Service

Requests/Services/Inventory Information

REQUESTS

SERVICES

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|----------|------------|--------------|-----------|
| 1377240 | MARRIAGE | Sam | | Testing |
| 1377239 | BIRTH | Copper | | Nichols |

Display

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C.. |
|-----------|------------|----------------|----------|--------|----------|-----------|-----|
| 1377240 | MARRIAGE | Certified Copy | Standard | 1 | \$ 15.00 | PENDING | Y |
| 1377239 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | COMPLETED | Y |

Display

Search To Print Event Record

Search To Print Event Record

Inventory Begin #

Inventory End #

Use Inventory

Use Inventory

Search Pending or Processed Applications

From the IVES-NX Home Screen,
Click **Fee/CAS > Search > Applicant**

Enter the information in the fields.
Click the **Search** button.

| Date Application | Applicant Number | Status | Priority | Date Received | Req or Appl First Name | Req or Appl Last Name | Company/Agency |
|------------------|------------------|---------|----------|---------------|------------------------|-----------------------|----------------|
| 10/12/2020 | 12059 | Pending | Normal | 10/12/2020 | | Nichols | |
| 10/12/2020 | 12060 | Pending | Normal | 10/12/2020 | Penny | Nichols | |
| 10/12/2020 | 12064 | Pending | Normal | 10/12/2020 | | Test | |
| 10/12/2020 | 12065 | Pending | Normal | 10/12/2020 | | | |

The search result will show a grid of all the applications that meet the search criteria. The grids can be rearranged simply by highlighting the top column title and dragging to the desired location.

Double click or click on the **Display** button to open and review the application.

Cancelling an Application

Service Information

Clear Service Fields

Service Type: Certified Copy
Fee Type: Standard
Copies: 0
Status: CANCELLED
Cost: \$15.00

Update Service

Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377263 | BIRTH | Sam | | Nichols |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|---------|------|
| 1377263 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | PENDING | Y |

On the application you wish to Cancel. Go to the **Request to Inventory** tab.

In the Service Information paragraph, change the "PENDING" status of the service to "CANCELLED".

Click the **Update Service** button, which will update the service grid showing the service is cancelled.

Applicant: 1276823

Image count: 0 | Notes count: 0 | Alerts: 0

Application | **Request to Inventory** | Mailing | Billing | Reassign Request | Flags | Return & Notes | Marriage Returns

Request Information

Clear Request Fields

Event Type: BIRTH
Event State File Number:
Event Begin Date: 02/01/1989
Event End Date: 02/01/1989
Purpose Type: Drivers License Or Permit

Relationship: Self
First Name: Sam
Middle Name:
Last Name: Nichols
Suffix:

Request Status Type: CANCELLED

Update Request

Update Request

Service Information

Clear Service Fields

Service Type: Certified Copy
Fee Type: Standard
Copies: 0
Status: CANCELLED
Cost: \$15.00

Update Service

Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377263 | BIRTH | Sam | | Nichols |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|---------|-----------|------|
| 1377263 | BIRTH | Certified Copy | Standard | 0 | \$ 0.00 | CANCELLED | Y |

Search To Print Event Record

Search To Print Event Record

Inventory Begin #

Then highlight and click on the pending requests grid located in the Request section. This will auto fill the request information fields.

Change the status from "Pending" to "Cancelled" in the Request Status Type field.

Click the **Update Request** button. This will update the status on the grid.

Payment Information

| Payment Date | Payment Type | Check Num | Amount | Applicant ID | Payment ID | Modify Date | Create Date | Retur... |
|--------------|--------------|-----------|---------|--------------|------------|-------------|-------------|----------|
| 02/25/2021 | CASH | | \$ 0.00 | 1276823 | 1153670 | 02/25/2021 | 02/25/2021 | |

Search...

Clear Payment Fields

Clear Payment Fields

Payment Date: 02/25/2021

Payment Type: [Dropdown]

Payment Amount: [Input field circled in red]

Check Serial #

Update Payment

Removing the Payment

Go back to the Application tab, highlight and click on the payment grid. This will auto fill the payment information fields.

Change the the Payment Amount to a zero.

Click the **Update Payment** button. This will update the status on the grid.

Applicant: 12197

Image count: 0 | Notes count: 0 | Alerts: 0 | Save

Application | Request & Service | Mailing | Billing | Reassign Request | Flags | Return & Notes | Marriage Returns

Application Status

Applicant Number: 12197

Date of Application: 11/19/2020

Application Type: COUNTER

Assigned To Queue: [Dropdown]

Priority: Normal

Identification: Drivers License

Date Received: 11/19/2020

Date Completed: [Calendar]

Completed By: [Field]

Applicant Information

First Name: Copper

Middle Name: [Field]

State Name: Iowa

City: [Field]

Phone - Primary: [Field]

Fax - If Applicable: [Field]

Email: [Field]

Total \$ Charged: \$20.00

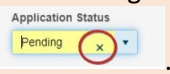
Total \$ Paid: \$20.00

Amount Due: \$0.00

Payment Information

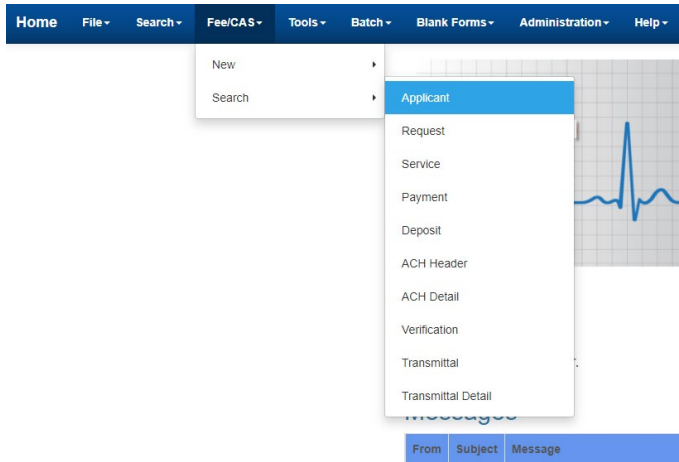
| Payment Date | Payment Type | Check Num | Amount | Applicant ID | Payment ID | Modify Date |
|--------------|--------------|-----------|----------|--------------|------------|-------------|
| 11/20/2020 | Cash | | \$ 20.00 | 12197 | 9580 | 11/20/2020 |

Complete the Application

- Then go to the Application Status, change the "Pending" to "Cancelled". Be sure to click the X on the field in order to see all options 
- Enter the Date of Completed.
- Click the **Save** button. The system will auto-fill in the name of the person who completed the application.
- Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Exchanging Certified Copies

NOTE: Users can only exchange certified copies (state or county) issued from their county. DO NOT CHANGE THE TRANSACTION TYPE OF EXCHANGED PAPER TO VOID IN INVENTORY.



From the Home screen, click **Fee/CAS>Search>Applicant.**

Search (Applicant)

Search Criteria Search Result

| | | |
|----------------------|----------------------------------|--------------------------------------|
| Date Application | Applicant Number | Status |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Date Received | Req or Appl First Name | Event Type |
| <input type="text"/> | <input type="text" value="Sam"/> | <input type="text"/> |
| Tracking Number | Company/Agency Name | Req or Appl Last Name |
| <input type="text"/> | <input type="text"/> | <input type="text" value="Testing"/> |
| Applicant Last Name | Application Type | Applicant First Name |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| | User location Code | Assigned to (Queue) |
| | <input type="text"/> | <input type="text"/> |

Clear Search

On the Search (Applicant) screen:

- Enter the first and last name of the person on the certificate in the Req or Appl fields. *The name is on the certified copy that you are exchanging.*
- Click the **Search** button.

Search (Applicant)

Search Criteria Search Result

Flat View Export

Images: 0 Notes: 0 Display

Group By:

| Date Application | Applicant Number | Status | Event Type | Date Received | Req or Appl First Name | Req or Appl Last Name | Tracking Nu |
|------------------|------------------|---------|------------|---------------|------------------------|-----------------------|-------------|
| 02/15/2021 | 1276799 | PENDING | | 02/15/2021 | Bob | Testing | |
| 02/15/2021 | 1276798 | PENDING | | 02/01/2021 | Sam | Testing | |

1 - 2 of 2 items

Click the **Display** button or double click on the line on the grid.

NOTE: You may have more than one result. If that happens, you will need to open each request and cross-reference the applicant information at the bottom of the request page.

Service Information

Clear Service Fields

Clear Service Fields

Service Type: Certified Copy Fee Type: Exchange Copies: 4 Status: PENDING Cost: \$0.00

Update Service

Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377241 | DEATH | Bob | | Testing |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|-----------|------|
| 1377241 | DEATH | Certified Copy | Standard | 4 | \$ 60.00 | COMPLETED | Y |
| 1377241 | DEATH | Certified Copy | Exchange | 4 | \$ 0.00 | PENDING | Y |

Display Display

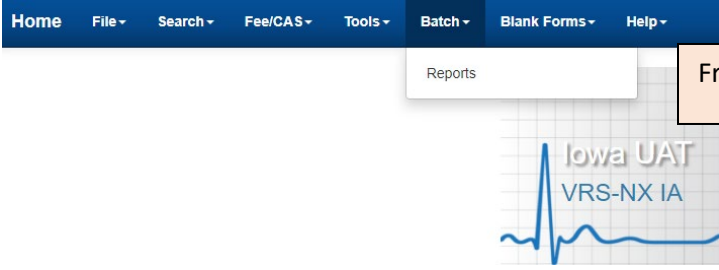
On the Application, click the **Request to Inventory** tab:

- Click the **Clear Service Fields** button
- Enter Service Type = Certified Copy
- Enter Fee Type = **Exchange**
- Enter # of Copies
- Click **Update Service** button.

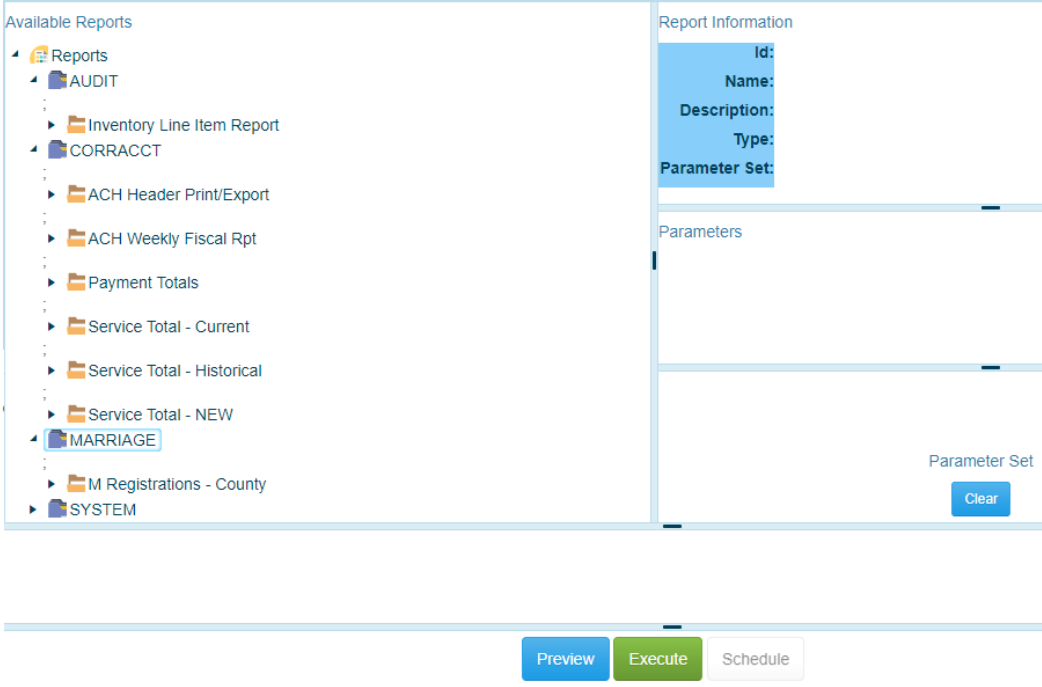
This will add the exchange service to the Service section. **Make sure that the correct Service line is highlighted in the Service Information grid.**

Continue the rest of the process on printing the certificate, using inventory paper and completing the application. Follow the steps starting on page 23 of the manual.

Accounting Reports



From the Home screen, click **Batch > Reports**.



All reports under the AUDIT, CORRACCT and MARRIAGE folders are available for the county to use.

Click on the report. This will open the fields to the right to enter the date range. Some will require the dates to entered in the form of mm/dd/yyyy,mm/dd/yyyy (notice comma separation) and others will need to enter the dates in separate fields.

Then click the **Preview** button. This will bring up the report to allow users to view and print the report.

- **Inventory Line Item Report** - Users are able to view all inventory paper that are USE, VOID, RECEIVED, etc.
- **ACH Header Print/Export** – Report of detail service of each week’s ACH file
- **ACH Weekly fiscal Rpt** – Report of the services that were processed during the ACH week.
- **Payment Totals** - Report of the payments entered into the system.
- **Service Total-Current** – Report of the services that were completed (status changed to COMPLETED or RECORD NOT FOUND) during the current ACH week.
- **Service Total-Historical** – Reports of service totals beyond the ACH week.
- **Service Total-Current** – Report of the services that were completed (status changed to COMPLETED or RECORD NOT FOUND) during the current ACH week.
- **M Registration-County** – Report of all registered marriages.

ACH

COMPLETING SERVICES IN IVES

Definition of each status type:

- **PENDING** – service is waiting to be processed
- **COMPLETED** – service has been processed
- **CANCELLED** – service has not been processed and never will be
- **RECORD NOT FOUND** – the record cannot be found by the user attempting the search
- **FORWARD TO STATE** – service is being forwarded to the state to process because the record is not found or not available to the user
- **VOID** – service was completed but should now be void because of an error or an issue with the printer, etc. If money was received for the service that was voided, then generally another service will be added to replace it.

Below are the rules that apply for completing a service:

1. When the service status is changed to **COMPLETED** or **RECORD NOT FOUND**, the transaction is applied to the ACH detail table (which means it will be included in the ACH pull).
2. Once a service status is **COMPLETED** or **RECORD NOT FOUND**, the only way to reverse the transaction is to change the status to **VOID**. Once the status is **VOID**, the service cannot be edited.

Example: If anything happens during the print process (like the paper rips or you put the wrong type of paper in) you would VOID the service and create a new one. You no longer need to zero out the number of copies when voiding.

3. Before a service is completed, the status can be changed to **CANCELLED**. **CANCELLED** services do not appear in the ACH detail table and are not a part of the ACH pull. Once the status is **CANCELLED**, the service cannot be edited.

SCHEDULE

The weekly schedule is displayed in a section later in this document titled 'ACH SCHEDULE', but as an overview:

- Services completed (with a status of **COMPLETED** or **RECORD NOT FOUND**) from Tuesday through Monday are included in the following Tuesday ACH file.
- County Recorders have all day Tuesday and Wednesday until 3:00pm to **VOID** a service from the ACH week.
 - Note – A void is really the only type of adjustment that can be done on the prior week's services. If the status of a service is changed to anything other than **VOID**, it will be reflected on the new ACH week that you are currently in, not the previous ACH week.

- On Wednesday at 3:00pm the ACH header report is run again to remove any recently voided services.
- The State Vital Records staff has from 3:30 to 5:00pm to enter manual adjustments to the ACH file for any previous ACH pull that have been verified to be incorrect.
- At 5:00pm the ACH file is staged for transfer to the bank
- Overnight Wednesday the file is transmitted to the bank and the pull should reflect Thursday's date (when the withdrawal actually takes place).
- If at a later date the County Recorder believes they were charged too much for a previous ACH week, they should complete the online ACH Adjustment Form located on the Vital Records Portal.

DAILY REPORTS

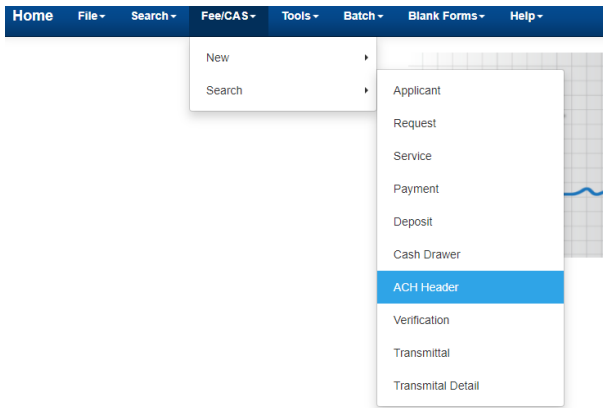
It is recommended to run the following reports on a daily basis in order to detect issues in a timely manner.

- **Payments Totals** → is simply a report of the payments entered into the system between the dates provided
- **Service Totals –Current** → is a report of the services that were completed (status changed to COMPLETED or RECORD NOT FOUND) between the dates provided.

WEEKLY REVIEW

Once the state has run the weekly process to create the ACH detail file, the ACH transactions are available for the county to view and print. *This will help verify that everything is accurate.* The county has all day Tuesday and all day Wednesday (until 3:00pm) to void any transaction that is incorrect simply by changing the service status to VOID.

- **ACH Header**– is a printable report of the services that were processed between the dates provided. The parameter dates should be Tuesday through the following Monday. The ACH Date field will be blank until the file is 'finalized' and sent to the bank. This report can also be printed at a later time (at which time the ACH Date field will appear with the date the transaction took place).



The details of each week's ACH file are available under the menu **Fee/CAS – Search – ACH Header**

Search (ACH Header)

The search criteria form includes the following fields and controls:

- Begin Date of Service:** Text input field.
- End Date of Service:** Text input field.
- Deposit Date:** Text input field.
- Stripoff Date:** Text input field.
- OWED_TO_STATE:** Text input field with 'Clear' and 'Search' buttons.
- User Location:** Dropdown menu with 'Polk' selected.
- User Location Code:** Text input field.
- Is Active?:** Text input field with 'T' entered.

Enter in criteria for the week desired **OR** user can do a search to populate a listing for **ALL** ACH period by entering user county name only without a date.

Search (ACH Header)

The search results table displays the following data:

| Begin Date of Service | End Date of Service | OWED_TO_STATE | Deposit Date | Stripoff Date | User Location | User Location Code |
|-----------------------|---------------------|---------------|---------------------|---------------------|---------------|--------------------|
| 10/12/2014 00:00:00 | 11/22/2014 00:00:00 | | | | Polk | CNTY-077 |
| 11/18/2014 00:00:00 | 11/24/2014 00:00:00 | | | | Polk | CNTY-077 |
| 01/13/2015 00:00:00 | 01/19/2015 00:00:00 | | | | Polk | CNTY-077 |
| 02/17/2015 00:00:00 | 02/23/2015 00:00:00 | | | | Polk | CNTY-077 |
| 02/23/2015 00:00:00 | 02/23/2015 00:00:00 | | | | Polk | CNTY-077 |
| 02/24/2015 00:00:00 | 03/02/2015 00:00:00 | 252 | 03/05/2015 00:00:00 | 03/05/2015 00:00:00 | Polk | CNTY-077 |
| 05/07/2015 00:00:00 | 05/07/2015 00:00:00 | | | | Polk | CNTY-077 |
| 05/01/2015 00:00:00 | 05/25/2015 00:00:00 | 16 | | | Polk | CNTY-077 |
| 05/01/2015 00:00:00 | 05/26/2015 00:00:00 | | | | Polk | CNTY-077 |
| 05/20/2015 00:00:00 | 05/26/2015 00:00:00 | | | | Polk | CNTY-077 |
| 06/01/2015 00:00:00 | 06/15/2015 00:00:00 | | | | Polk | CNTY-077 |
| 01/01/2015 00:00:00 | 06/15/2015 00:00:00 | 244 | | | Polk | CNTY-077 |
| 01/01/2015 00:00:00 | 06/20/2015 00:00:00 | | | | Polk | CNTY-077 |
| 01/01/2018 00:00:00 | 01/31/2018 00:00:00 | | | | Polk | CNTY-077 |

The results will appear either with a single or multiple results depending on the search.

Double click on the desired ACH period or highlight and click on the **Display** button.

Home File Search Documents Fee/CAS Action Tools Batch Administration Help

ACH Header: 4974 Image count: 0 Notes count: 0 Alerts: 0

ACH County:

County Information

User Location Description:

Post:

Begin Date of Service: End Date of Service: Deposit Date: Stripoff Date:

Owed to State: Adjustments are included: Recalculate Total: Print Report:

Detail Information (services)

No items to display

The results will appear with the total amount owed to the state and detail list of the services for the ACH period.

ACH Details

User Location: User Location Code:

Services

First name: Last Name: RequestID: ServiceID:

Service Completed Date: Owed to State: Kept by County:

Record is Adjustment?: Adjustment Notes:

Event Type: Service Type: Fee Type: Copies: Service Total:

Funds

| Fund | State or Local | Amount |
|----------------|----------------|--------|
| Fund 1: COUNTY | L | 4.00 |
| Fund 2: VR | S | 13.00 |
| Fund 3: GF | S | 18.00 |

Each service can be viewed in detail by double-clicking on it.

Home File Search Documents Fee/CAS Action Tools Batch Help

ACH Header: 4974 Usage count: 0 Notes count: 0 Alerts: 0 Save

ACH County: **Flags**

County Information

User Location Description: User Location Code:

Begin Date of Service: End Date of Service: Deposit Date: Stripoff Date:

Owed To State: Adjustments are Included: Recalculate Total: Print Report:

Detail Information (services)

No items to display

Printing the Report

Open the ACH Header Report, click on the

button.

Warren

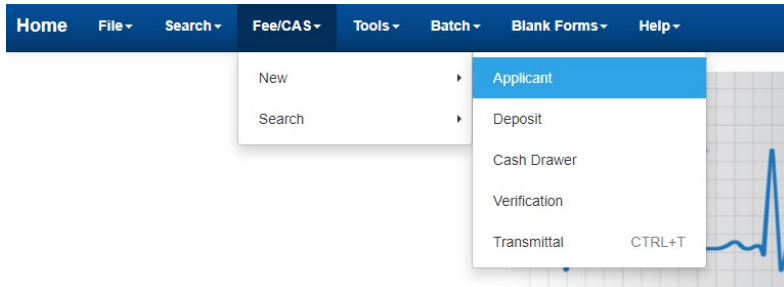
| Begin Date of Service | End Date of Service | Deposit Date | Stripoff Date | | | | | | | | |
|-----------------------|----------------------|--------------|---------------|----------|------------------|----------|--------|----------------|----------|-------|-----|
| 02/24/2015 | 03/02/2015 | 03/05/2015 | 03/05/2015 | | | | | | | | |
| OWED_TO_STATE | Adjustments Included | | | | | | | | | | |
| 252.00 | N | | | | | | | | | | |
| RequestID | First | Last | Completed | Event | Service | Fee Type | Copies | Kept by County | To State | Total | Adj |
| 11052 | Dean | Warner | 02/24/2015 | MARRIAGE | Application | Standard | 1 | 4.00 | 31.00 | 35.00 | N |
| 11045 | Ellen-One | Warner | 02/25/2015 | BIRTH | Certified Copy | Standard | 1 | 4.00 | 16.00 | 20.00 | N |
| 11045 | Ellen-One | Warner | 02/25/2015 | BIRTH | Certified Copy | Standard | 1 | 4.00 | 16.00 | 20.00 | N |
| 11046 | Dale | Warner | 02/25/2015 | DEATH | Certified Copy | Standard | 2 | 8.00 | 32.00 | 40.00 | N |
| 11046 | Dale | Warner | 02/25/2015 | DEATH | Fact of Death | Standard | 1 | 4.00 | 16.00 | 20.00 | N |
| 11047 | Dean | Warner | 02/25/2015 | MARRIAGE | Application | Standard | 1 | 4.00 | 31.00 | 35.00 | N |
| 11048 | Deldra | Warner | 02/25/2015 | MARRIAGE | Application | Standard | 1 | 4.00 | 31.00 | 35.00 | N |
| 11049 | Loretta | Warner | 02/25/2015 | MARRIAGE | Application | Standard | 1 | 4.00 | 31.00 | 35.00 | N |
| 11050 | Gloria | Warner | 02/25/2015 | BIRTH | Plain Paper Copy | No Fee | 1 | 0.00 | 0.00 | 0.00 | N |
| 11051 | Hannah | Warner | 02/25/2015 | MARRIAGE | Certified Copy | Standard | 1 | 4.00 | 16.00 | 20.00 | N |
| 11082 | Jeanetta | Warner | 02/27/2015 | BIRTH | Certified Copy | Standard | 1 | 4.00 | 16.00 | 20.00 | N |
| 11082 | Jeanetta | Warner | 02/27/2015 | BIRTH | Plain Paper Copy | Standard | 1 | 5.00 | 0.00 | 5.00 | N |

Page: 279.40 X 215.90

The report appears, click the print icon in the upper left hand corner.

Forward a Request to the State

There will be situations where a record cannot be found at the county level. There are many reasons that could happen (it's not always the case that the record is sealed). In addition, it may only be one request within an application that contains multiple requests.



On the Home Page, click **Fee/CAS > New > Applicant**

A screenshot of the 'Applicant: New' form. The 'Application Status' section includes fields for 'Applicant Number', 'Date Of Application' (02/19/2021), 'Application Type' (dropdown), 'Assigned To Queue' (dropdown), 'Priority' (NORMAL), and 'Order/Tracking'. The 'Applicant Information' section includes fields for 'First Name', 'Middle Name', 'Last Name', 'Company/Agency Name', 'Country' (United States), 'State Name' (Iowa), 'City', 'Address 1', 'Address 2', 'Zipcode', 'Phone - Primary', 'Fax - If Applicable', and 'Email'. There is a checkbox for 'Is Applicant Address Same As Mailing?'. At the bottom, there are three summary fields: 'Total \$ Charged' (\$0.00), '- Total \$ Paid' (\$0.00), and '= Amount Due' (\$0.00).

Application tab:

- Enter the Application Type, the Identification and the Date Received.
- Tab to the Applicant Information paragraph, enter the First Name, Last Name and mailing address.
- Click the **Save** button.
- The dialog message appears, "The record saved successfully". Click Ok button.

Message from webpage

The record saved successfully

Ok

Payment Information

| Payment Date | Payment Type | Check Num | Amount | Applicant ID | Payment ID | Modify Date | Create Date | Retur... |
|--------------|--------------|-----------|--------|--------------|------------|-------------|-------------|----------|
| | | | | | | | | |

Initialize Payment Fields

Initialize Payment Fields

Payment Date

Payment Amount

Payment Type

Check/CC/MO #

Add New Payment

Add New Payment

Adding Payment

- Click the **Initialize Payment** button. The Payment Date will pre-populate. It also change the button to “Clear Payment Fields”.
- Enter the Payment Amount
- Choose the Payment Type, enter Check Number (if applicable).
- Click the **Add New Payment** button. The payment grid will reflect the payment.

The system will take you to the **Request to Inventory** Tab.

Applicant: 1258073

Image count: 0 Notes count: 0 Alerts: 0 Save

Application Request to Inventory Mailing Billing Reassign Request Flags Return & Notes Marriage Returns

Request Information

Initialize Request Fields

Initialize Request Fields

Event Type

Event State File Number

Event Begin Date

Event End Date

Purpose Type

Relationship

First Name

Middle Name

Last Name

Suffix

Request Status Type

Add New Request

Add New Request

Next add the Request Information.

- Click the **Initialize Request Fields** button, this will clear and open the fields. It also change the button to “Clear Request Fields”.
- Enter the following: Event Type, Event Begin Date, Event End Date (if different from begin date), Purpose Type, Relationship (*If the relationship is “self” the system will auto-fill the name of the applicant from the application*) and First, Middle (if applicable) and Last Name.
- Note: If the State File Number is available, enter it and the system will auto-fill the Event Date, First, Middle (if applicable) and Last Name.
- Click the **Add New Request** button. The request will populate in the grid on the REQUESTS Section on the bottom of the page.

Service Information

Initialize Service Fields Service Type Fee Type Copies Cost Status

Initialize Service Fields

Add New Service

Add New Service

Next add the **Service Information**.

- Click the **Initialize Service Fields** button. This will clear and open the fields. It also change the button to “Clear Service Fields”.
- Enter the following:
 - Service Type
 - Fee Type
 - Number of Copies
- Click the **Add New Service** button. The service will populate in the grid on the SERVICE Section on the bottom of the page.

Service Information

Clear Service Fields

Clear Service Fields

Service Type Fee Type Copies Status Cost

Certified Copy Standard 1 RECORD NOT FOUND \$15.00

Update Service

Update Service

Requests/Services/Inventory Information

REQUESTS SERVICES

| RequestID | Event | First Name | Middle Na ... | Last Name |
|-----------|-------|------------|---------------|-----------|
| 1377242 | BIRTH | Copper | | Nichols |

| RequestID | Event Type | Service Type | Fee Type | C |
|-----------|------------|----------------|----------|---|
| 1377242 | BIRTH | Certified Copy | Standard | 1 |

Manually change the “PENDING” status to “RECORD NOT FOUND” (this ensures that the county keeps their split of the service fee).

Click the **Update Service** button. This updates the status on the service grid.

Service Information

Clear Service Fields

Service Type: Certified Copy

Fee Type: No Fee

Copies: 1

Status: PENDING

Cost: \$0.00

Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377242 | BIRTH | Copper | | Nichols |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|------------------|------|
| 1377242 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | RECORD NOT FOUND | Y |
| 1377242 | BIRTH | Certified Copy | No Fee | 1 | \$ 0.00 | PENDING | Y |

Next create a Second Service

Click the **Clear Service Fields** button.

Enter or choose from the dropdown:

- Service Type: Certified Copy
- **Fee Type – No Fee**
- Enter # of Copies

Click the **Update Service** button. The service will populate in the grid on the Service Section.

Service Information

Clear Service Fields

Service Type: Certified Copy

Fee Type: No Fee

Copies: 1

Status: **FORWARD TO STATE**

Cost: \$0.00

Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|-------|------------|--------------|-----------|
| 1377242 | BIRTH | Copper | | Nichols |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|------------------|------|
| 1377242 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | RECORD NOT FOUND | Y |
| 1377242 | BIRTH | Certified Copy | No Fee | 1 | \$ 0.00 | PENDING | Y |

Then highlight and click on the pending services grid located in the Service section. *This will auto fill the request information fields.*

Manually change the “PENDING” status to “FORWARD TO STATE”.

Click the **Update Service** button. The service will populate in the grid on the Service Section.

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
|-----------|------------|----------------|----------|--------|----------|------------------|------|
| 1377242 | BIRTH | Certified Copy | Standard | 1 | \$ 15.00 | RECORD NOT FOUND | Y |
| 1377242 | BIRTH | Certified Copy | No Fee | 1 | \$ 0.00 | FORWARD TO STATE | Y |

Attach the application (refer to the Scan & Attach process in the manual).

Applicant: 1276800

Image count: 1 Notes count: 0 Alerts: 0 Previous Event Save

Application Request to Inventory Mailing Billing **Reassign Request** Flags Return & Notes Marriage Returns

Assignments

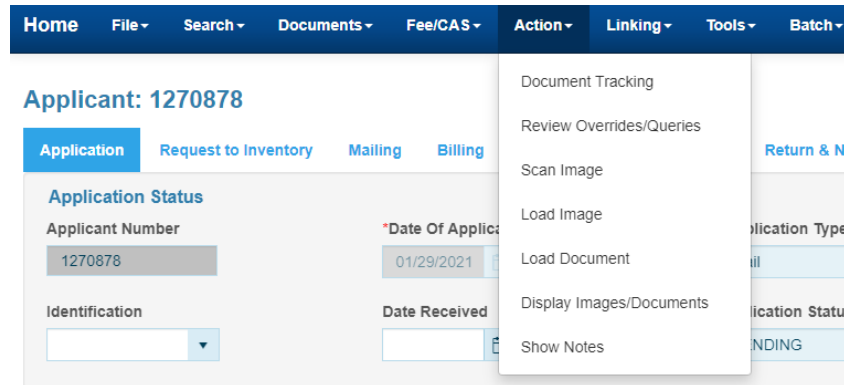
Reassign Request to this Location Location Code Assigned

Central Location CENTRAL

Next, click on the **Reassign Request** tab.

- Select “Central Location” from the Reassign Request to this Location dropdown.
- Click the **Save** button. *The forwarded request will appear in the State Office work queue to be completed.*
- Click the ‘X’ on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Scan & Attach Image/Documents

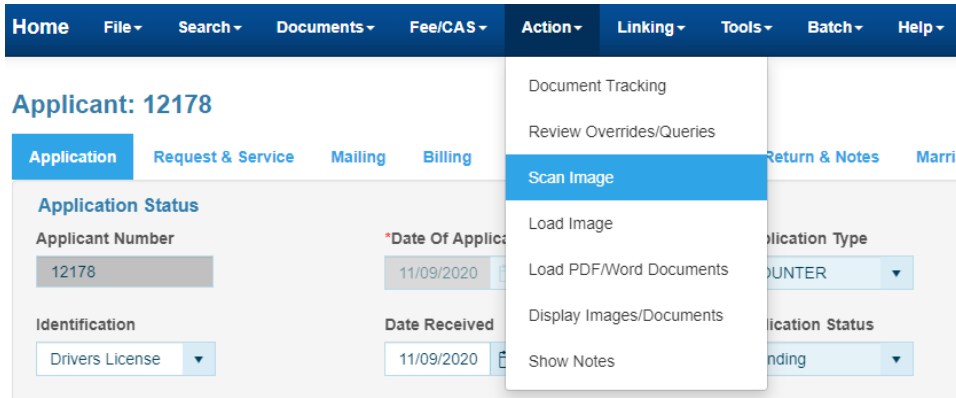


Image/Documents can be attached to any CAS application, marriage record, or correction request.

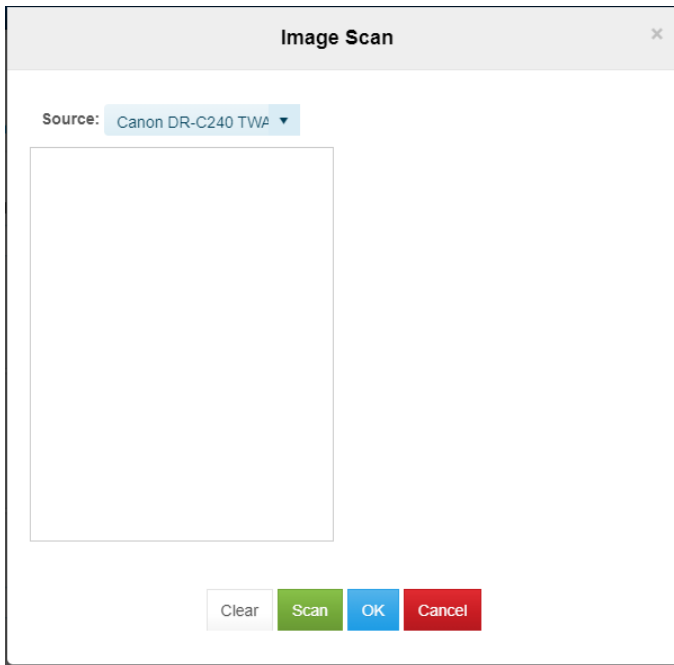
- Select Action from the menu
- **Select one of the 3 options:**
 1. Scan Image (if you have a scanner attached to your computer and it allows you to load the image to the application -> use this option)
 2. Load Image (if you have a scanner that routes it to a file document requiring you to save it as a file -> use this option)
 3. Load Documentation (if you have a scanner that requires you to save it as a PDF or Word Document -> use this option).

****Note: everyone has different scanners which works in various ways. So the instructions below gives you 3 different options you have to scan and attach document(s).**

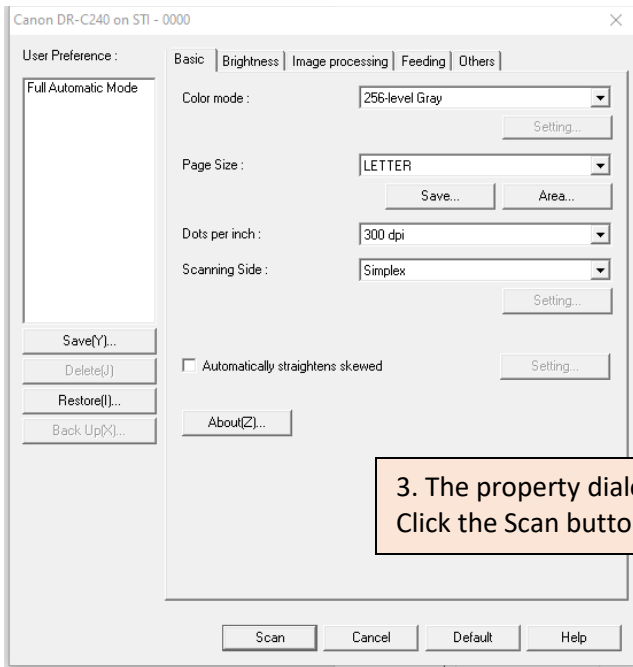
OPTION 1: Scan Image (if you have a scanner attached to your computer and it allows you to load the image to the application)



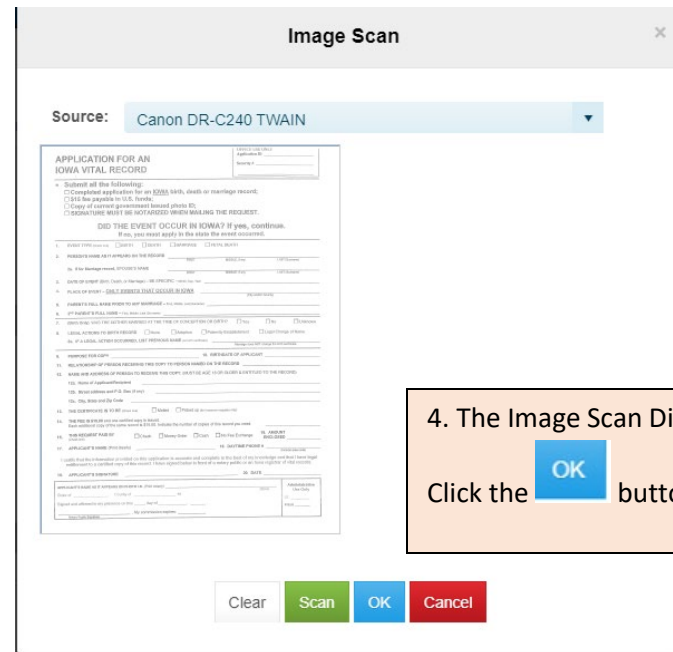
1. On the record or application, click **Action >Scan Image**



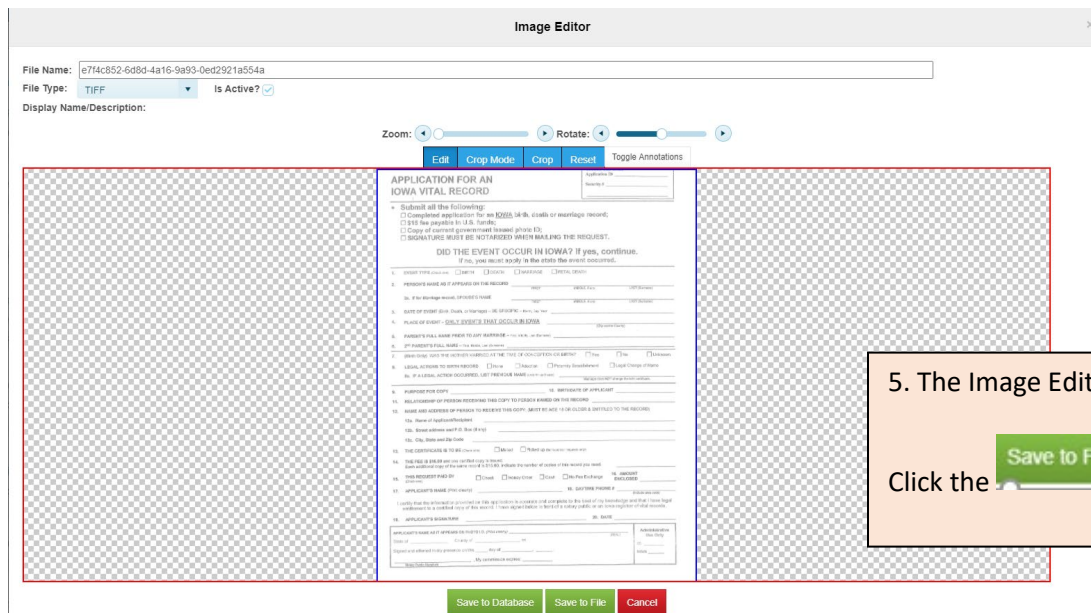
2. Image Scan dialog will appear. Make sure your scanner name is in the source field.
Click the **Scan** button.



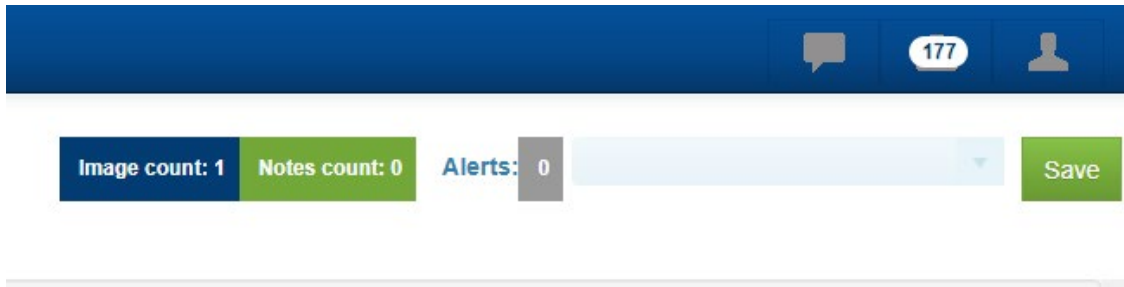
3. The property dialog will appear. Click the Scan button.



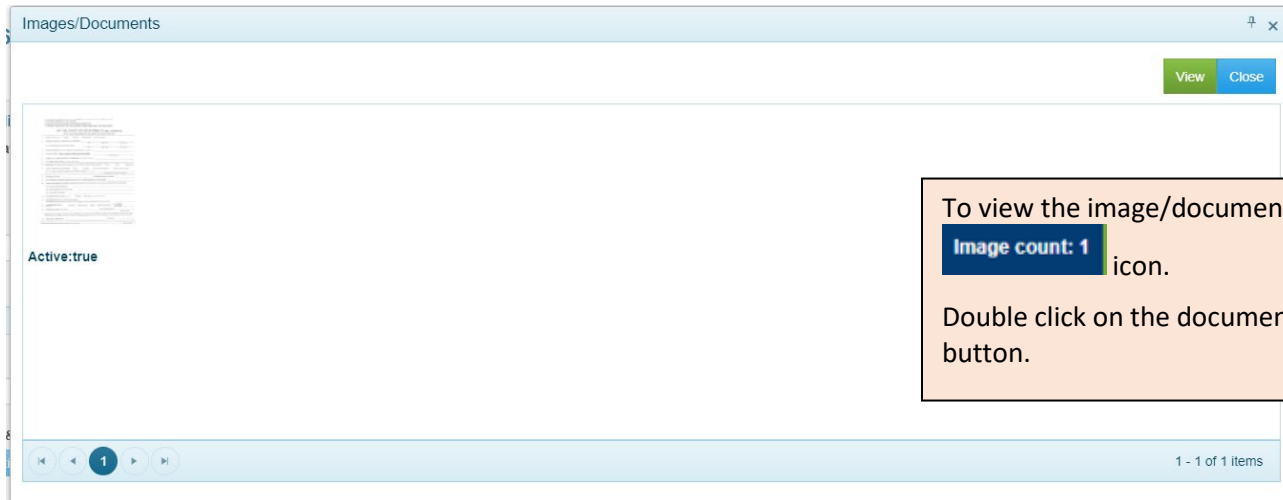
4. The Image Scan Dialog will appear. Click the **OK** button.



5. The Image Editor dialog will appear. Click the **Save to File** button.

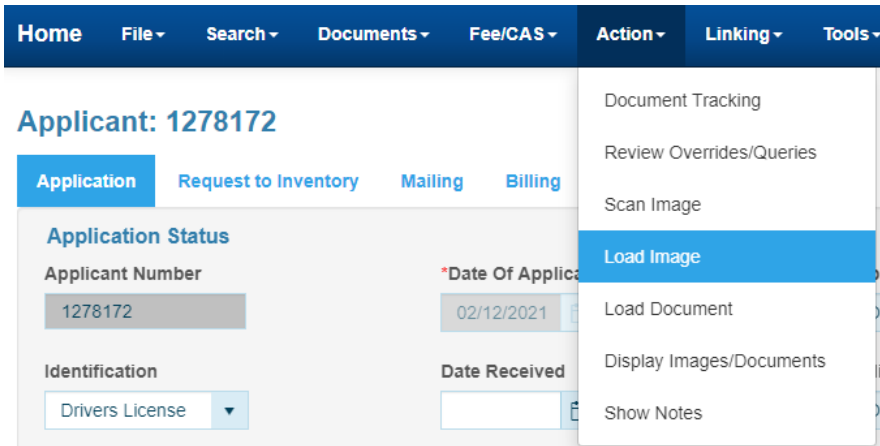


6. The **Image count: 1** icon located on the top corner of the page will reflect the attached image/document.



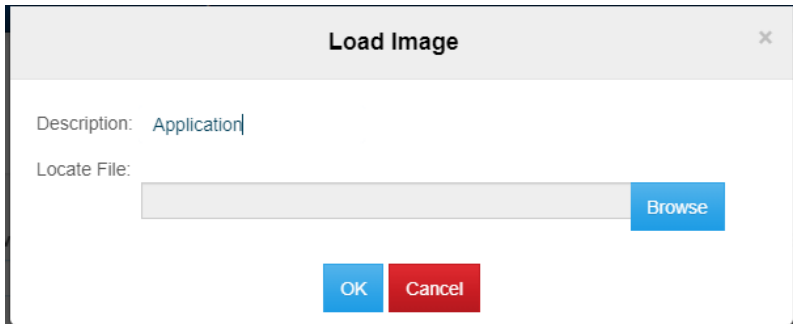
To view the image/document, click on the **Image count: 1** icon.
Double click on the document or click the **View** button.

OPTION 2: Load Image (If you have a scanner that requires you to save it as an image -> use this option)



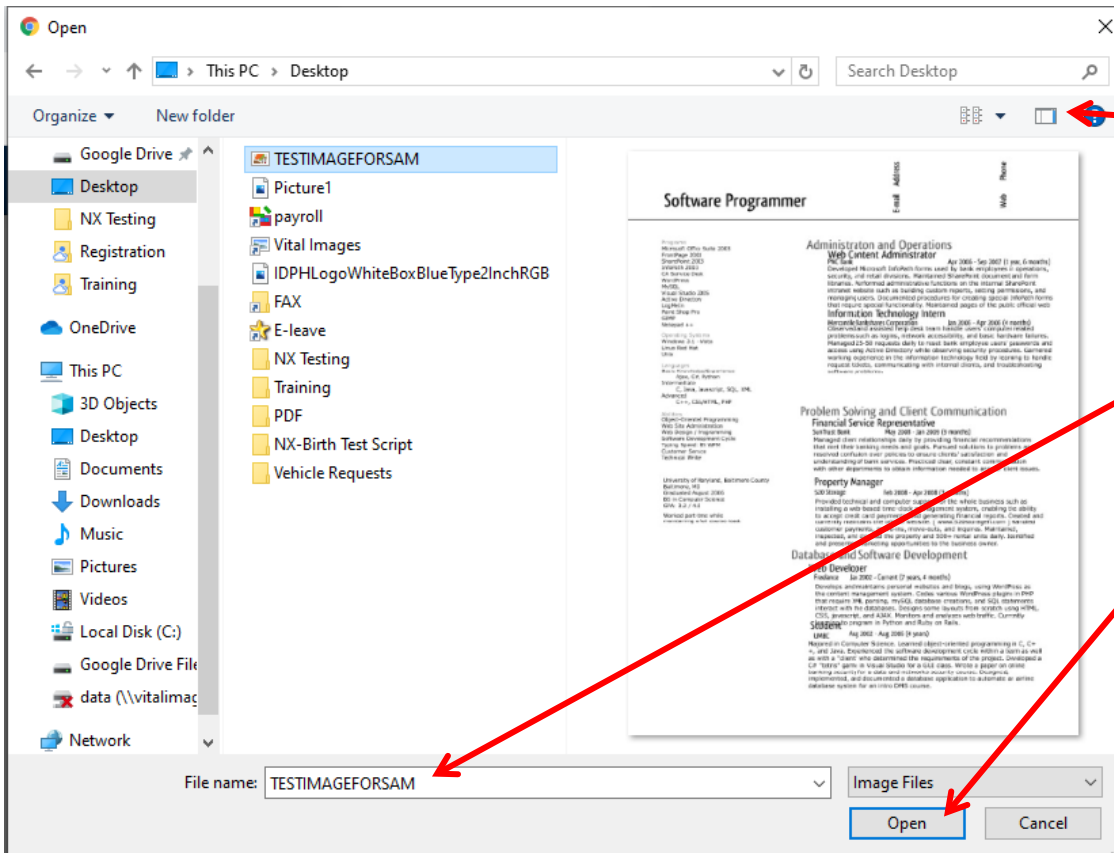
Scan the application and supporting documentations (if applicable) through your scanner which will require you to save the Image as a **jpeg or tiff** on your computer.


1. From the menu click **Actions > Load Image**



2. The Load Image screen will appear – Enter a description for the document.

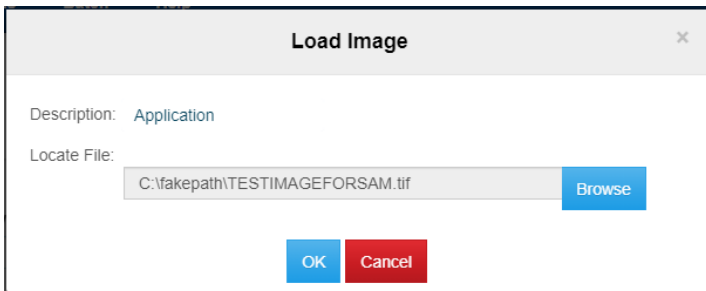
Click on the **Browse** button.




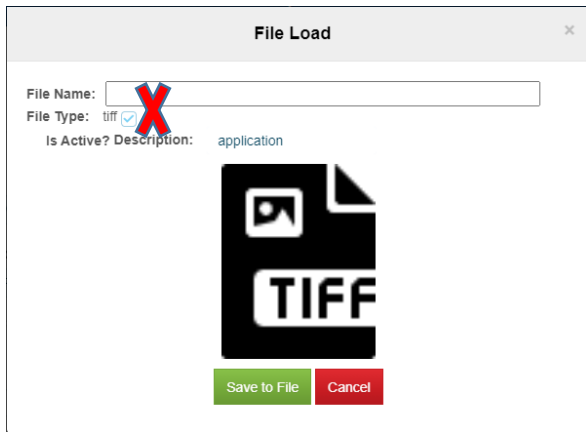
3. Open screen appears, click on the  (3 panels) icon on the upper right hand corner. **This will allow you to preview the image/document.**

4. Find the saved image file. Click on the image file which will filter into the “File name” field.

5. Click on the “Open” button. This will take the user back to the Load Image screen.

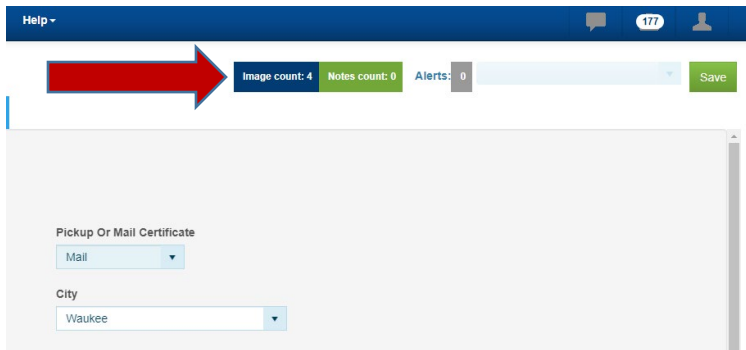


6. The file name appears in the Load Image screen. Click the  button.

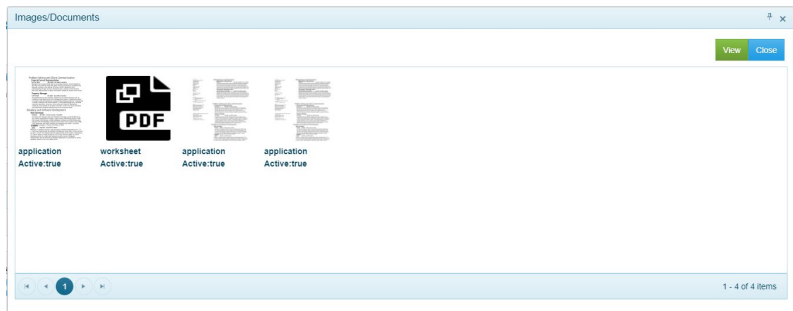


7. The File Load screen will appear. **DO NOT ENTER A FILE NAME**

8. Click the **Save to File** button.



9. The **Image count: 4** icon located on the top corner of the page will reflect the attached image/document.



To view the image, double click on the **Image count: 4** icon on the top right hand corner of the page.

The image will display, double click on the document or click the **View** button.

OPTION 3: Load PDF or Word Document (If you have a scanner that requires you to save it as a PDF or Word Document -> use this option)

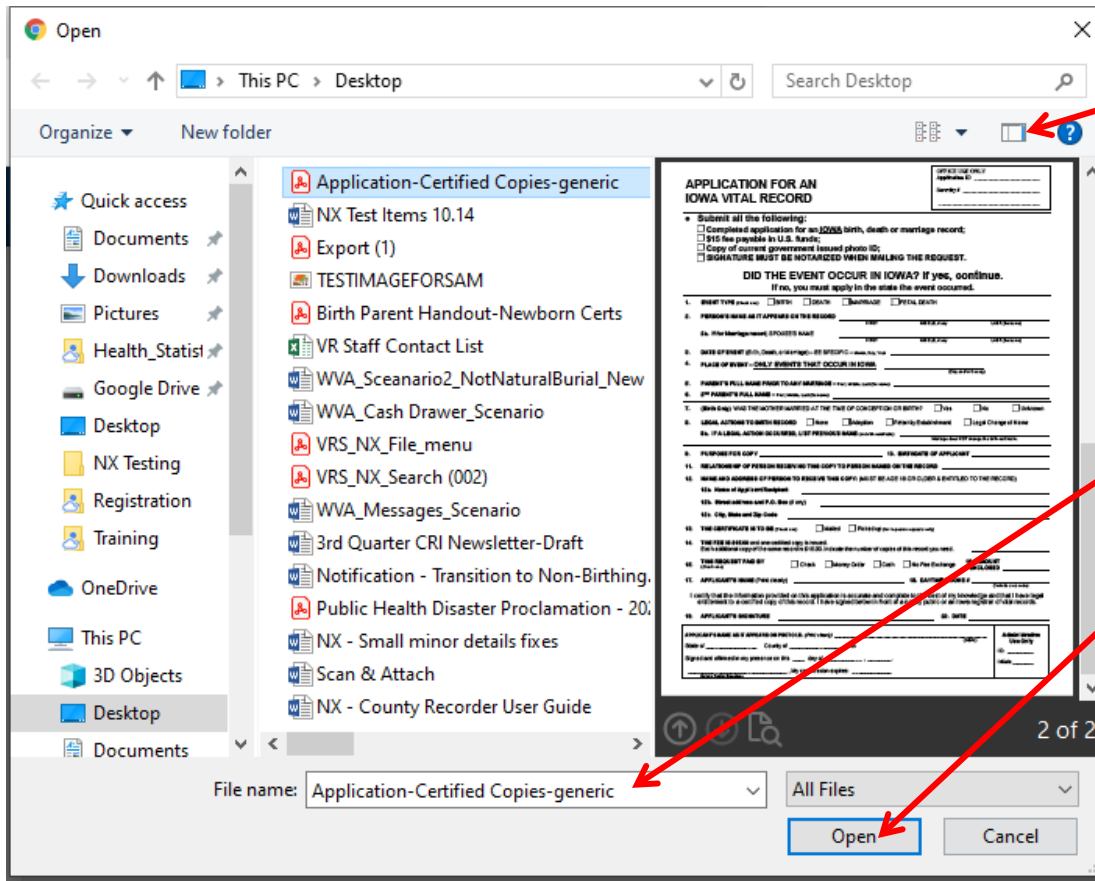
The screenshot shows a web application interface for an applicant with ID 1278172. The 'Action' menu is open, showing options: Document Tracking, Review Overrides/Queries, Scan Image, Load Image, Load Document (highlighted), Display Images/Documents, and Show Notes. The application status section includes fields for Applicant Number (1278172), Date of Application (02/12/2021), Identification (Drivers License), and Date Received.


Scan the application and supporting documentations (if applicable) through your scanner which will require you to save it as a PDF or a Word Document on your computer.

1. On the record/application, from the menu **Actions > Load Document**

The 'Load File' dialog box is shown with the following fields: 'Display Name/Description' containing 'Application', 'Locate File' with an empty text box and a 'Browse' button, and 'OK' and 'Cancel' buttons at the bottom.

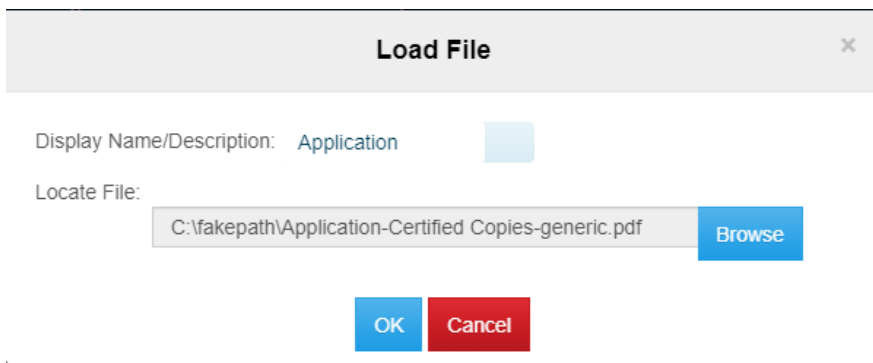
2. The Load File screen will appear – Enter a description for the document.
Click on the **Browse** button.




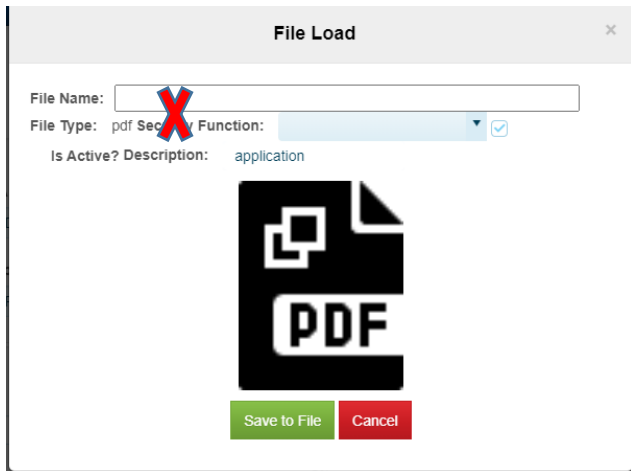
3. Open screen appears, click on the  (3 panels) icon on the upper right hand corner. **This will allow you to preview the image/document.**

4. Find the saved image file. Click on the image file which will filter into the “File name” field.

5. Click on the “Open” button. This will take the user back to the Load Image screen.

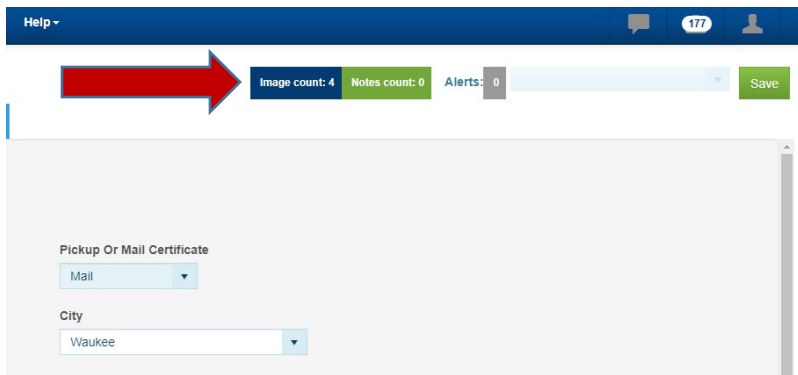


6. The file name appears in the Load File screen. Click the  button.

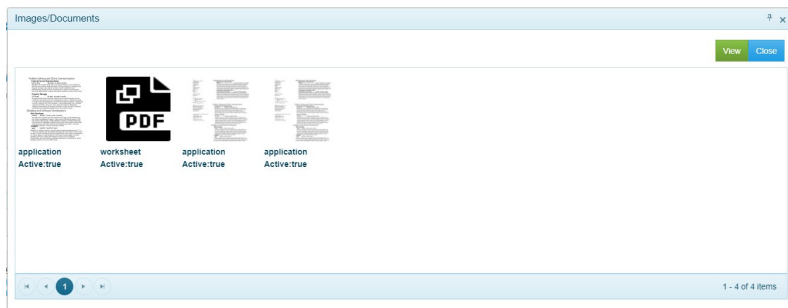


7. The File Load screen will appear. **DO NOT ENTER A FILE NAME**

8. Click the **Save to File** button.



9. The **Image count: 4** icon located on the top corner of the page will reflect the attached image/document.



To view the image, double click on the **Image count: 4** icon on the top right hand corner of the page.

The Image/Documents will display, double click on the document or click the **View** button.

Editing a Certificate Image

Cropping, Rotating and Redacting

The image shows a software interface titled "Image Editor" with a central workspace displaying a resume. The interface includes a top toolbar with buttons for "Edit", "Crop Mode", "Crop", "Reset", "Toggle Annotations", and "Edit Annotations". Below the toolbar are two sliders: "Zoom:" and "Rotate:". The resume content includes sections like "Software Programmer", "Administraton and Operations Web Content Administrator", "Information technology Intern", "Financial Service Representative", "Property Manager", "Database and Software Development Web Developer", and "Student".

Zoom
Allow users to view the image at a closer range.

Rotate
Allow users to rotate the image.

Crop Mode
Allows users to change the view of the image.

Crop
Allows users to crop when all the edits are complete.

Edit Annotations
Allow users to redact the image.

Reset
Reverts back to the original image.

Buttons: OK, Cancel

Crop & Rotate an Image

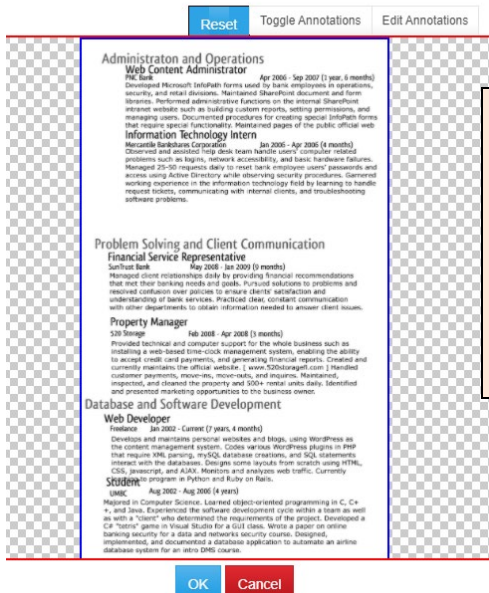


1. Click **Crop Mode** button.




2. Move and drag the crop screen sides and corners until it frames the image.
3. If the image needs to be rotated, click on the "Rotate" arrows or the "Rotate" slide bar to tilt the image. If not then go to step
4. Then click on the **Crop** button.

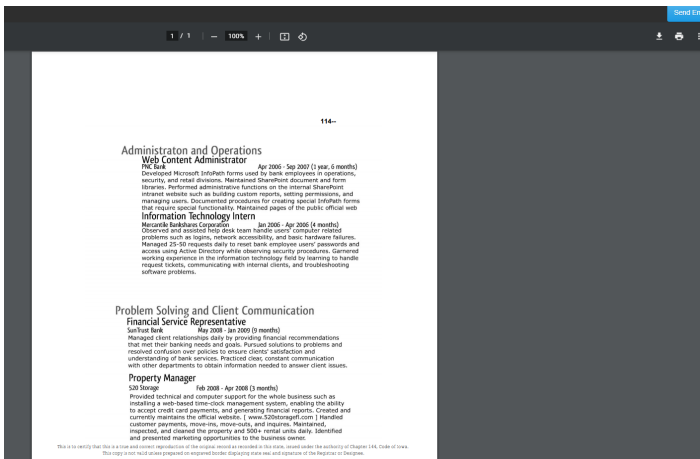
Image Editor




5. Preview of the cropped image.

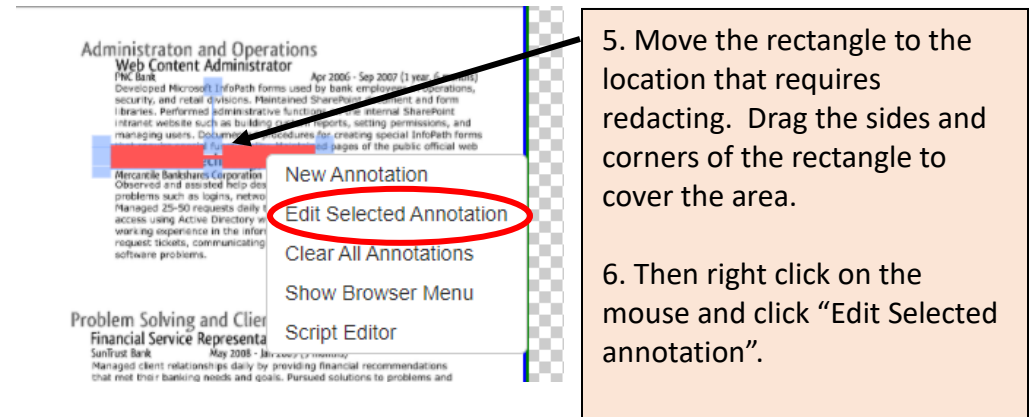
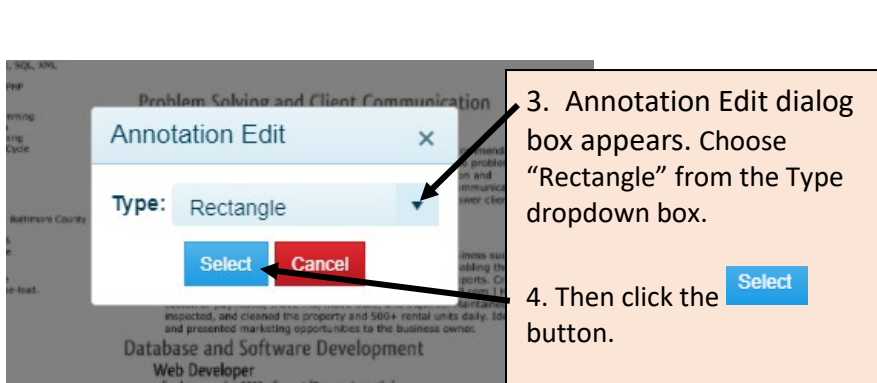
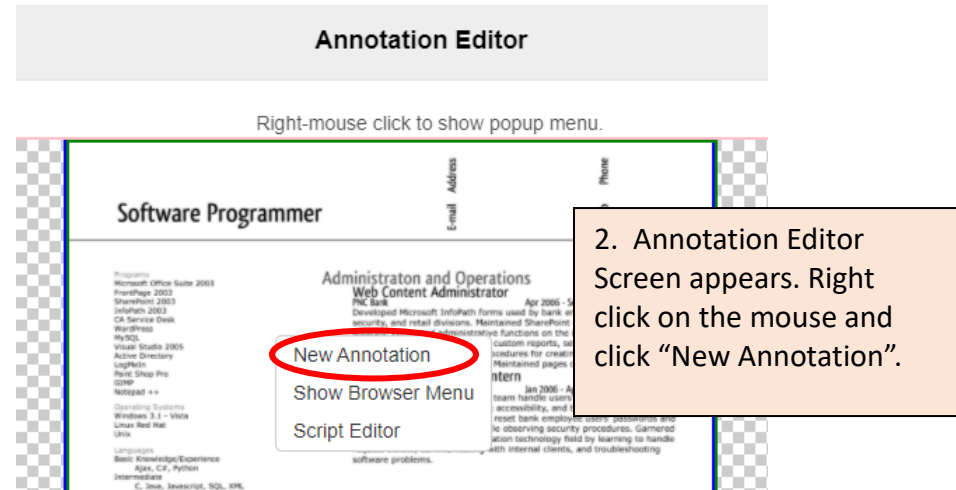
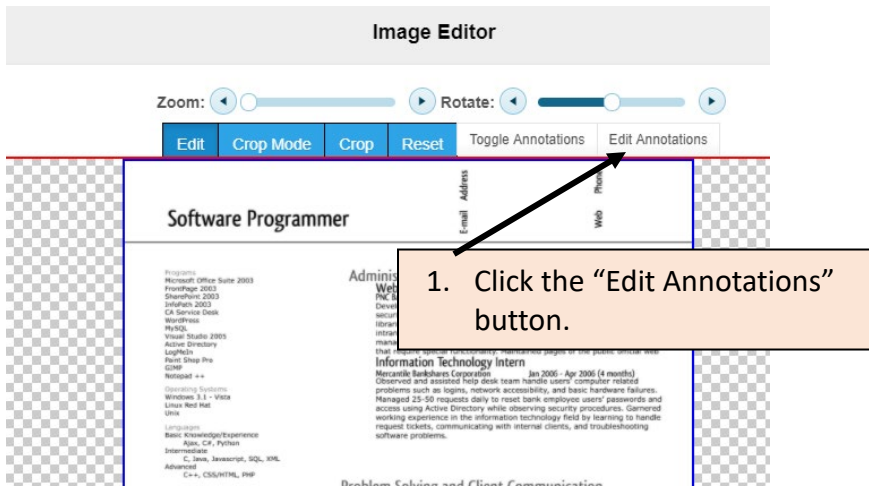
Click the  button.

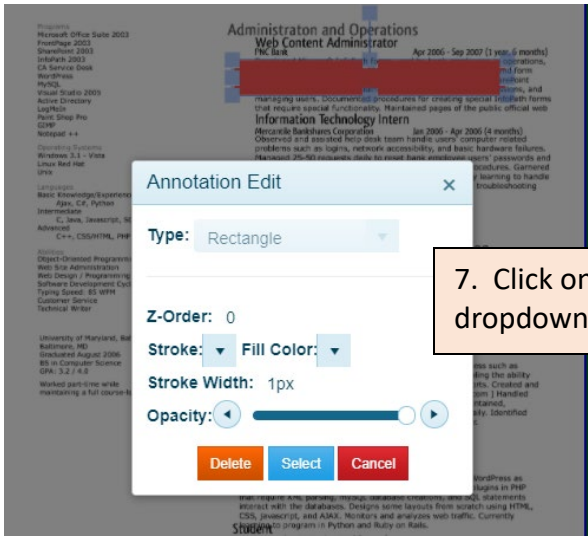
Users can click on the  button to undo any changes. Do not click the cancel button.



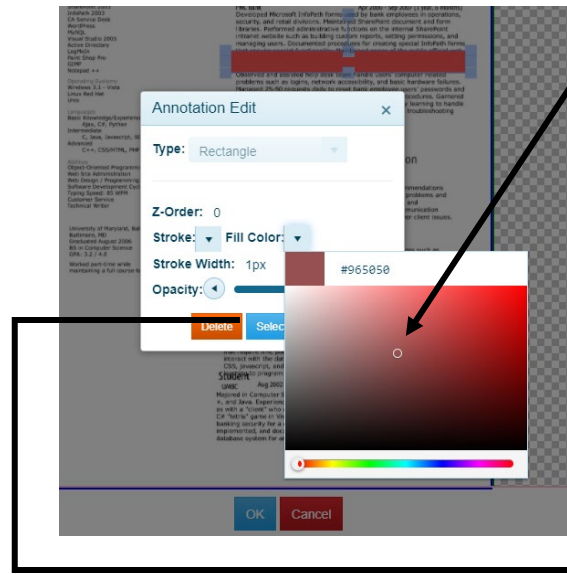
6. Final image. Click the  button.

Redact an Image





7. Click on the "Fill Color" dropdown.

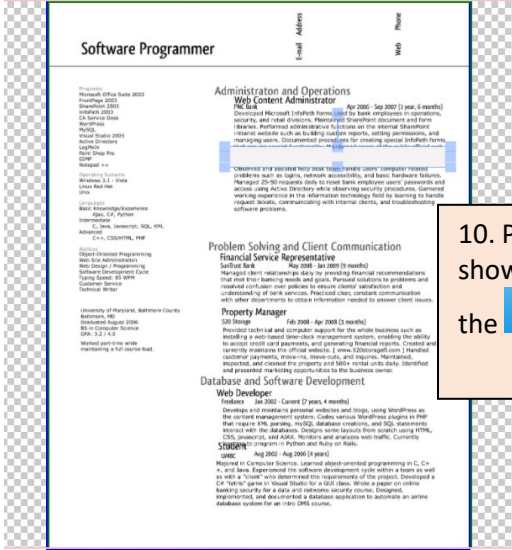


8. The color palette appears. Click on the color palette which will give you a tiny small circle. Click on the circle and drag it to desire color. Note: color white is upper left hand corner, #ffffff and the color black is lower bottom left hand corner, #000000

9. Then click the out of the color palette and click the **Select** button.

Annotation Editor

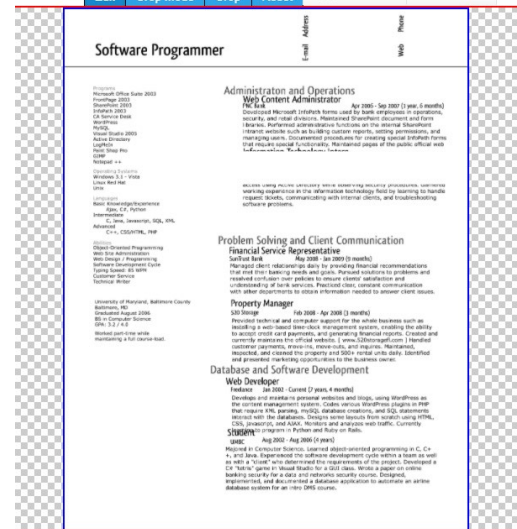
Right-mouse click to show popup menu.



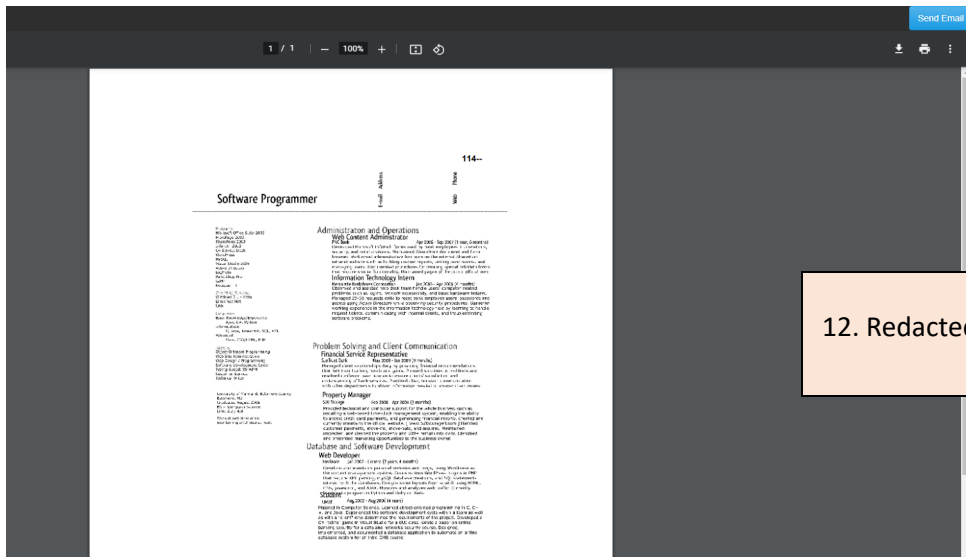
10. Preview of the image showing the redaction, click the **OK** button.


Image Editor

Zoom: [slider] Rotate: [slider]

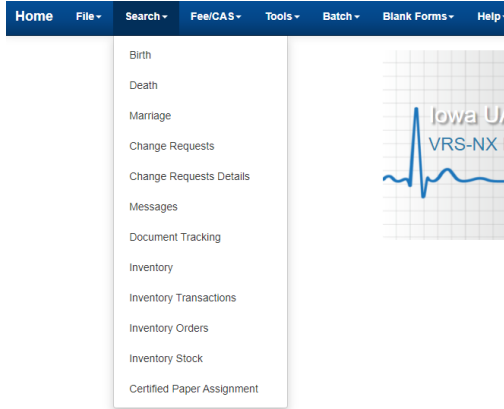


11. Final view of the redacted image, click the **OK** button.



12. Redacted image ready to print, click  button.

Plain Paper Copy of a Vital Record



Counties can only print a plain paper copy of a birth, death or marriage record that is within their county jurisdiction.

1. From the Home page, click **Search > [Pick Event Type]**

2. Enter the information into the fields. Click the **Search** button.

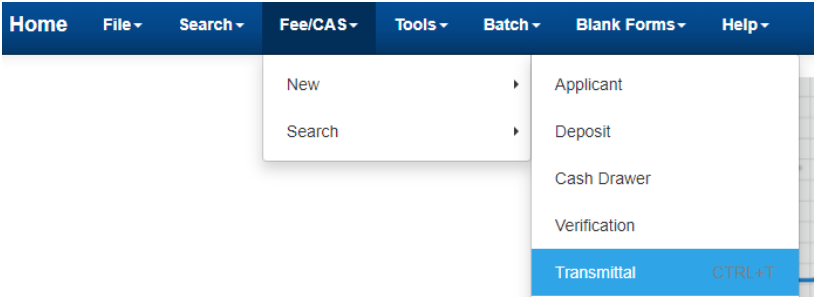
3. The record will display.

Click **Documents > Documents > [Type of Plain Paper Copy]**

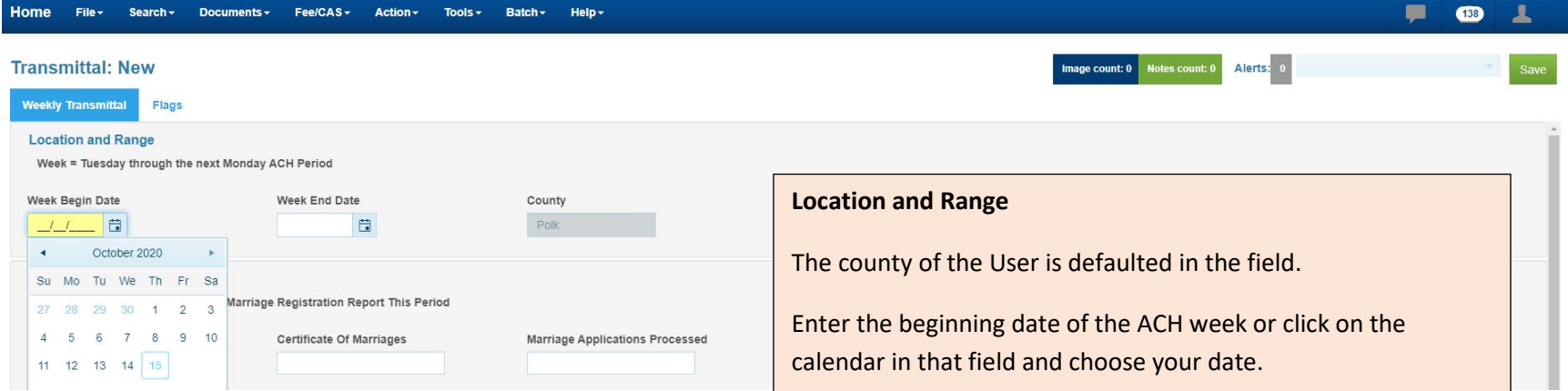
This does not require a CAS service.

Transmittal Process

The weekly transmittal is based on the ACH week that provides a comprehensive audit of all transactions for the week. The transmittal is to be completed by close of business on Wednesday of each week (Thursday if holiday).



From the home page, click **Fee/CAS > New > Transmittal**
This will bring up the Transmittal.



Location and Range
The county of the User is defaulted in the field.
Enter the beginning date of the ACH week or click on the calendar in that field and choose your date.
Tab and the system will auto-fill the Week End Date and auto save the transmittal.

Part 1: Transmittal Log

of Original Marriages

of Marriage Applications Processed

Sealing Notices - Year/Week #

Death/Birth Match - Year/Week #

Part 1: Transmittal Log

1. Enter the total number of original marriages. If no original marriages were processed enter zero.
2. Enter the total number of marriage application(s) processed. If no marriage application(s) were processed enter zero.
3. Enter the Sealing Notices report name (Year-Week Number).
4. Enter the Birth Death Match report name (Year-Week Number.)

Part 2: Paper - Control Numbers Used This ACH Period

IVES State SAFETY Paper - FIRST SERIES

Control Numbers - None

*First # Used *Last # Used *SUBTOTAL 1st Series First Available # NEXT Period End of Series

IVES State SAFETY Paper - SECOND SERIES

First # Used Last # Used SUBTOTAL 2nd Series First Available # NEXT Period *TOTAL SECURITY PAPER - IVES State

NON-IVES County SAFETY Paper - FIRST SERIES

Control Numbers - None

*First # Used *Last # Used *SUBTOTAL 1st Series First Available # NEXT Period End of Series

NON-IVES County SAFETY Paper - SECOND SERIES

First # Used Last # Used SUBTOTAL 2nd Series First Available # NEXT Period *TOTAL SECURITY PAPER - NON-IVES County

Part 2: Paper-Control Numbers Used This ACH Period.

The first and second line are for **IVES** safety paper. If NO safety paper was used for the ACH week, click the Control Numbers – None box Control Numbers - None . This will put zeros the First Number Used, Last Number Used and the subtotal field.

1. Enter the “First Number Used” of the ACH week and the “Last Number Used” of the ACH week. *The system will auto calculate the “Subtotal” amount of IVES safety paper used.*
2. Enter the first available number for the NEXT period. *If the safety paper is at the end of the series, click the “End of Series” box.*
3. On the second line if there is another series to report enter the first and last number used; if no, Tab to the “Total Safety Paper-IVES State” field. *The system will auto calculate the “Total Safety Paper “used.*

The third and fourth line are for **NON-IVES** safety paper. If NO safety paper was used for the ACH week, click the Control Numbers – None box Control Numbers - None . This will put zeros the First Number Used, Last Number Used and the subtotal field.

1. Enter the “First Number Used” of the ACH week and the “Last Number Used” of the ACH week. *The system will auto calculate the “Subtotal” amount of NON-IVES safety paper used.*
2. Enter the first available number for the NEXT period. *If the safety paper is at the end of the series, click the “End of Series” box.*
3. On the second line if there is another series to report enter the first and last number used; if no, Tab to the “Total Safety Paper-IVES State” field.

Click the button.

Detailed Control Numbers Audit

Control Numbers - None

Clear Control #s

Transmittal Type: Paper Type: Begin: End:

Save Control #s

Transmittal Type dropdown menu:

- Selected: [Yellow]
- Damaged
- Exchange
- Unaccounted For

Paper Type dropdown menu:

- Selected: [Yellow]
- IVES
- Non IVES

Search...

No items to display

Detailed Control Numbers Audit. This section accounts for all control numbers associated with all types of transaction (Damaged, Exchange, Unaccounted and Wallet).

If there are NO control numbers to report. Click on the 'Check if None' box.

If there are control numbers to report:

- Click the button.
- Choose from the type of transaction from the 'Transaction Type' dropdown.
- Choose the type of paper from the 'Paper Type' field.
- Enter the begin safety paper number
- Enter the end safety paper number
- Click the button. This will populate the itemize grid.

| Type | Paper | Begin # | End # | Detail ID |
|-----------------|----------|---------|---------|-----------|
| Damaged | IVES | 8888888 | 8888888 | 52 |
| Exchange | NON IVES | 8888888 | 8888888 | 53 |
| No Fee | IVES | 8888888 | 8888888 | 54 |
| Unaccounted For | NON IVES | 4444444 | 4444444 | 55 |
| Va | IVES | 8888888 | 8888888 | 56 |
| Wallet | IVES | 8888888 | 8888888 | 57 |

1 - 6 of 6 items

Repeat this process if there are more transactions to report. **Users MUST click on the button each time they add a new transaction type.**



Completion

Record Completed:

Completed Date:

Completed By:

Completion

- Enter a Y in the RECORD Completed field and click the  button. The completed date and the name of the person will auto-fill.
- A pop up message stating, “The record save successfully,” click the  button.
- Click the ‘X’ on the tab to close out of IVES NX

Printing the Weekly Transmittal

Home | File | Search | Documents | Fee/CAS | Action | Tools | Batch | Help

Documents > Weekly Transmittal

Weekly Transmittal | Flags

Location and Range

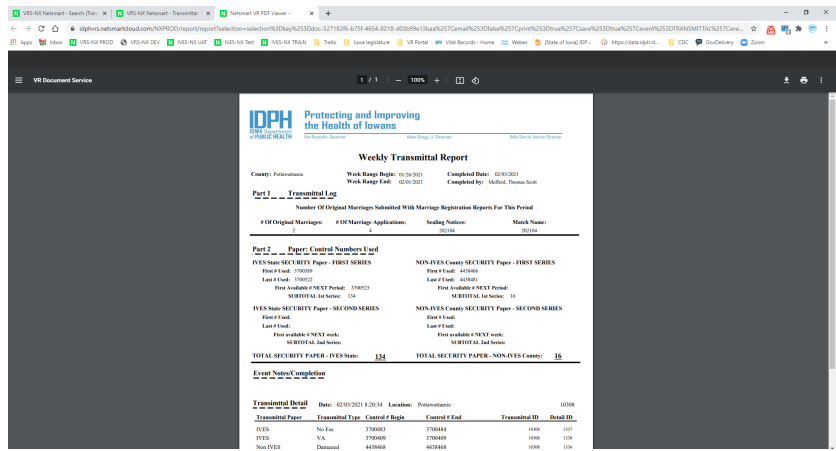
Week = Tuesday through the next Monday ACH Period

Week Begin Date: 10/01/2020



Week End Date: 10/07/2020

County: Polk

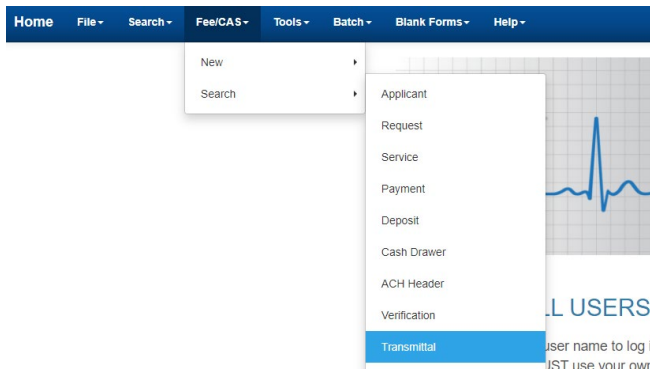
On the weekly transmittal, from the menu click **Documents>Documents>Weekly Transmittal** from the menu.



Review over the transmittal.

- Click the  icon.
- The printer dialog box will appear. *This dialog box is specific to general printing and all printers should be available.*
 - Choose the correct printer from the Destination field.
 - Enter the number of copies requested.
 - If applicable* choose additional settings based on YOUR PRINTER set up.
- Click the  button.
- Click the ‘X’ on the tabs to close out of IVES NX.

Searching for the Weekly Transmittal



To search for a transmittal that has been filed in IVES
 From the main menu, click on **Fee/CAS > Search > Transmittal**

Search (Transmittal)

Search Criteria Search Result

County Week Range Begin Date Week Range End Date Clear Search

Create Date Completed? Transmittal ID

User will enter their county location.

The following may be entered to search for a transmittal:
 Week range begin date, Week range end date, Create User Name, Create Date or Transmittal ID.

Click on the Search button.
If no other search criteria is entered, results will show all transmittals filed for the county location.

Search (Transmittal)

Search Criteria Search Result

Flat View Export Images: 0 Notes: 0 Display

| County | Week Range Begin Date | Week Range End Date | Create Date | Completed? | Transmittal ID | Is Active | # of Images | # of |
|--------|-----------------------|---------------------|-------------|------------|----------------|-----------|-------------|------|
| Polk | 09/20/2020 | 09/26/2020 | 09/24/2020 | Y | 14 | T | 0 | 0 |
| Polk | 09/07/2020 | 09/14/2020 | 09/25/2020 | N | 17 | T | 0 | 0 |
| Polk | 09/25/2020 | 09/25/2020 | 09/25/2020 | N | 19 | T | 0 | 0 |
| Polk | 09/14/2020 | 09/20/2020 | 09/25/2020 | Y | 20 | T | 0 | 0 |
| Polk | 09/25/2020 | 10/01/2020 | 09/25/2020 | Y | 21 | T | 0 | 0 |
| Polk | 09/15/2020 | 09/21/2020 | 09/25/2020 | Y | 22 | T | 0 | 0 |
| Polk | | | 09/25/2020 | N | 18 | T | 0 | 0 |
| Polk | 09/15/2020 | 09/21/2020 | 09/28/2020 | Y | 28 | T | 0 | 0 |
| Polk | 09/01/2020 | 09/07/2020 | 10/01/2020 | N | 32 | T | 0 | 0 |
| Polk | 09/19/2020 | 09/25/2020 | 10/01/2020 | N | 33 | T | 0 | 0 |
| Polk | 10/01/2020 | 10/07/2020 | 10/07/2020 | N | 34 | T | 0 | 0 |

1 - 11 of 11 items

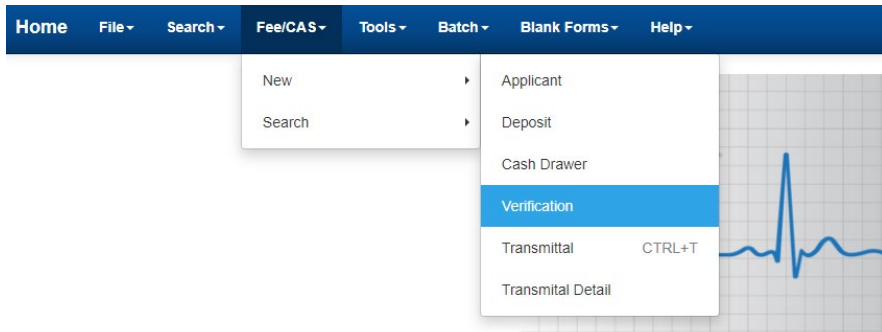
The search results will appear in the grid.

Double click to open transmittal or select the transmittal and click the Display button.

A previously filed transmittal may be printed at any time. Data previously entered on a transmittal that has been successfully saved and filed will need to go through the correction process.

Verification Request Process

A verification process is used to confirm information on older county record not available in IVES or illegible images in IVES. Verification of a vital record in the custody of the county recorder will only be performed when customers need a certified copy.



To start a verification request:

From the main menu, click on **Fee/CAS > New > Verification**

Verification: New

Image count: 0 | Notes count: 0 | Alerts: 0 | Save

County | State | Flags

Verification Status

Verification # [] *Date of Verification 10/15/2020 [] Userlocation Desc. Polk Verification Status PENDING

Registrant Information

*Event to Verify BIRTH [] Date of Event [] State File Number []

First Name [] Middle Name [] Last Name []

Item(s) to Verify

Registrant Name Parent's Location of Birth

Date of Event Sex of Registrant

Mother's Name Time of Event

Father's Name Date Filed

Mother's Date of Birth

Father's Date of Birth Other

On the County tab:

- Select the event
- Enter Date of the Event
- Enter State File Number (if known)
- Enter first, middle (optional) and last name of the registrant
- Check all items that needs to be verified
- If other – specify in the box provided
 1. Examples
 - a. Poor IVES images
 - b. Incorrect index

Verification Request Completion

County Comments

Verification Request Completed?

Verification Request Date

Verification Request Completed By

Change Verification Status

Close Verification

Cancel Verification


- Enter additional comments if necessary in the **County Comments** field.
- Enter a "Y" in the **Verification Request Completed** box.
The **Verification Request Date** and **Verification Request Completed By** will default with the current date and the user.
- Click the **Save** button. An email message is sent to the State.

*The **Cancel Verification** button can be used if the current request is no longer needed.*

Retrieving Completed Verification from the State

Home File Search Fee/CAS Tools Batch Blank Forms Help

138



ATTENTION ALL USERS!

Using someone else's user name to log in is a violation of security provisions for electronic filing. You **MUST** use your own user name to log in. Email IVESHelpDesk@dph.iowa.gov to request additional user names, or call (866) 309-0831.

Messages

| From | Subject | Message | Received | Event | Local File Number |
|----------------------|---------|---------|----------|-------|-------------------|
| No messages to show. | | | | | |

Work Queues

- CAS Requests Pending **75**
- CAS Requests Returns **0**
- M App Pending **7**
- M Change Request - Rejected **0**
- M Pending Marriage Return **40**
- Verification - Completed 16**
- Verification - Pending **0**

Once the verification has been completed by the State, the system saves it to the **Verification – Completed** work queues. In addition to the county receiving an email notification of the completion.

The county can then retrieve the completed verification request.

From the home page, in the Work Queue section, click **Verification – Completed**.

Work Queue: Verification - Completed

Search Criteria Search Result

Flat View Export

Images: 0 Notes: 0 Display

| | | | | | | | |
|----|------------|-----------|-------|----------|-----|-----------|------------|
| 15 | 07/05/2018 | COMPLETED | BIRTH | Josh | The | Man | 07/05/2018 |
| 16 | 07/05/2018 | COMPLETED | BIRTH | Bob | Bob | Bob | 07/05/2018 |
| 17 | 07/05/2018 | COMPLETED | BIRTH | A | A | A | 07/05/2018 |
| 18 | 07/05/2018 | COMPLETED | BIRTH | Sal | | | 07/05/2018 |
| 19 | 07/05/2018 | COMPLETED | BIRTH | Sam | I | Am | 07/05/2018 |
| 22 | 07/05/2018 | COMPLETED | BIRTH | Jack | | Smith | 07/05/2018 |
| 23 | 07/05/2018 | COMPLETED | BIRTH | Ester | | Smith | 07/05/2018 |
| 25 | 07/05/2018 | COMPLETED | BIRTH | Baby | | Otto | 07/05/2018 |
| 26 | 07/05/2018 | COMPLETED | BIRTH | Baby | | Harold | 07/05/2018 |
| 28 | 07/05/2018 | COMPLETED | BIRTH | Baby | | Boy | 07/05/2018 |
| 31 | 07/05/2018 | COMPLETED | BIRTH | W | W | W | |
| 32 | 07/05/2018 | COMPLETED | BIRTH | Z | | Z | 07/05/2018 |
| 33 | 07/05/2018 | COMPLETED | BIRTH | Panchita | | Gomez | 07/05/2018 |
| 34 | 07/05/2018 | COMPLETED | BIRTH | Panchito | | Hernandez | 07/05/2018 |
| 36 | 07/05/2018 | COMPLETED | BIRTH | Happy | Go | Lucky | 07/05/2018 |

1 - 16 of 16 items

All completed verifications will be list. Select the verification by double clicking the row, or select the row and click on the **Display** button.

Home File Search Fee/CAS Action Tools Batch Help

138

Verification: 36

Image count: 0 Notes count: 0 Alerts: 0 Save

County **State**

Verification Status

| | | | |
|----------------|----------------------|---------------------|---------------------|
| Verification # | Date of Verification | User/location Desc. | Verification Status |
| 36 | 07/05/2018 | Poik | COMPLETED |

Registrant Information

| | | | |
|-----------------|------------|-------------|-----------|
| Event to Verify | First Name | Middle Name | Last Name |
| BIRTH | Happy | Go | Lucky |

Date of Event: 07/05/2018
State File Number:

Requested Item(s) to Verify

Name on Record

Date of Event: 07/05/2018

Mother's Name

Father's Name

Mother's Date of Birth

Click on the **State** tab

The answer(s) will be located on the "Requested Item(s) to Verify paragraph".

Any additional comments by the state will be in the State Comment field. If a replacement copy was requested, the copy will be attached to the verification.

County 

Happy Go Lucky

Item(s) to Verify

- Registrant Name
- Parent's Location of Birth
- Date of Event
- Sex of Registrant
- Mother's Name
- Time of Event
- Father's Name
- Date Filed
- Mother's Date of Birth
- Father's Date of Birth
- Other

Once the request item(s) have been reviewed, click on the County tab

Click on the **Close Verification** button, in the Change Verification Status field. This completes the verification request and will be removed from the work queue.

Close browser.

Verification Request Completion

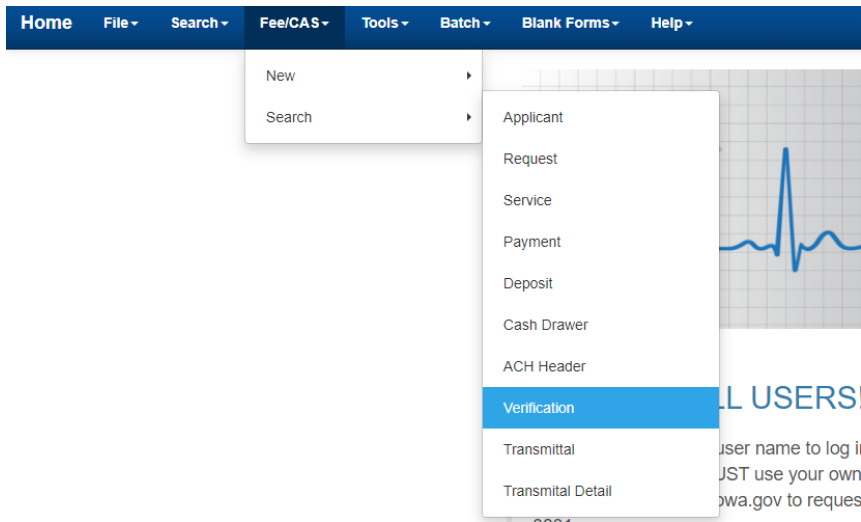
County Comments
asdf

Verification Request Completed? Verification Request Date Verification Request Completed By

Change Verification Status

Close Verification Cancel Verification

Search for a Verification Request



To search for a verification request:
Click on **Fee/CAS > Search > Verification**

Search (Verification)

Search Criteria Search Result

| | | |
|--|--|--|
| Verification # <input type="text"/> | Date of Verification <input type="text"/> | Verification Status <input type="text"/> <input type="button" value="Clear"/> <input type="button" value="Search"/> |
| First Name <input type="text"/> | Middle Name <input type="text"/> | Event to Verify <input type="text"/> |
| Date of Event <input type="text"/> | State File Number <input type="text"/> | Last Name <input type="text"/> |
| State Completed? <input type="text"/> | | County Completed? <input type="text"/> |

Enter the information then click the **Search** button.
All completed verifications will appear in the search results grid.

Making Notes

Applicant: 12198

Request Information

Clear Request Fields

Event Type: Birth

Event State File Number

Relationship: Self

First Name: Copper

Middle Name

Save Request

Service Information

Clear Service Fields

- Show Page Errors
- Site Information
- Notes
- Insert Current Date
- Clear Field
- Ignore Casing Rules
- Insert Default Value

1. Place the cursor on the field that requires an explanation and **right-click** on the mouse to bring up the dropdown options. Select "Notes"

Notes

| Notes Id | Field Name | Note | Create Date | Modify User Id | Modify User | Modify Date | Is Active | Application Function |
|-------------------|------------|------|-------------|----------------|-------------|-------------|-----------|----------------------|
| No notes to show. | | | | | | | | |

New Close

2. The Notes screen appears, click on the **New** button.

Notes

Field Name: REG_FIRST_NAME Field Label: First Name

Security Function: Is Active?

Format (inherited font) (inherited size)

This is a test demo

Save Cancel

3. On the open field, type the message, then click the **Save** button.

Notes

| Notes Id | Field Name | Note | Create Date | Modify User Id | Modify User | Modify Date | Is Active | Application Function |
|----------|----------------|---------------------|--------------------------------------|----------------|-----------------|--------------------------------------|-----------|----------------------|
| 213 | REG_FIRST_NAME | This is a test demo | 2020-12-01 11:10:24.47:6260182-05:00 | 26617 | Nichols, Sammui | 2020-12-01 11:10:24.47:6260182-05:00 | true | |

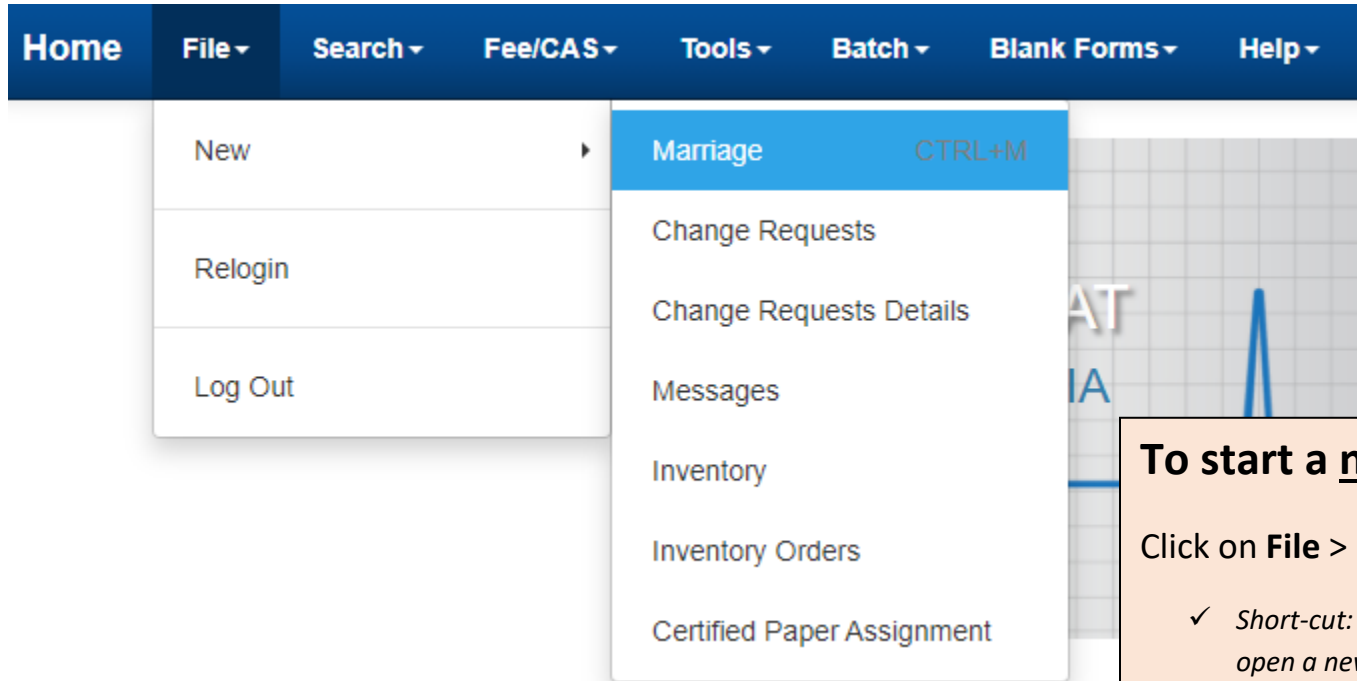
New Close

5. Note result appears, showing the field the message, the notation and the user name. Click the **Close** button.

Start a New Marriage Event

Iowa Code 595 governs the process of applying for and receiving a marriage license in the state of Iowa.

IAC641-98(144) is the section of administrative rules that apply to marriage license issuance.



The screenshot shows a software application's navigation bar with the following menu items: Home, File, Search, Fee/CAS, Tools, Batch, Blank Forms, and Help. The 'File' menu is open, showing options: New, Relogin, and Log Out. The 'New' sub-menu is also open, listing: Marriage (CTRL+M), Change Requests, Change Requests Details, Messages, Inventory, Inventory Orders, and Certified Paper Assignment. The 'Marriage' option is highlighted in blue.

To start a new marriage event:

Click on **File > New > Marriage**

- ✓ *Short-cut: you can use CTRL+M on your keyboard to open a new marriage event.*

General Tab

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

0 Image count: 0 Notes count: 0 Alerts: 0 Save

Marriage: New

General Party A Party B Application/License Marriage Return Flags CAS Application

System

State File Number County License Number Application Date Valid Date 3 Day Waiver

*Filing County Reg Type Code Record Status

Polk Pending

The marriage event is separated by tabs: *General; Party A; Party B; Application/License; Marriage Return; Flags; CAS Application.*

The new marriage event will always open to the *General* tab. The Filing County, Reg Type Code, and Record Status are all default fields that can not be changed.

Enter the Application Date

- The application date can be back-dated up to 3 calendar days only.
- The valid date will auto populate to include the correct calculate of the 3-day waiver.

If there is a 3-day waiver, enter 'Y'

The valid date will re-populate with the new date.

Things to Remember

- **County License #:** Once the license has been marked complete by the user on the Application/License tab, the County License # will populate.
- **State File Number:** Once the Certificate of Marriage has been returned to the county for filing, and the Marriage Return tab is completed, the State File Number will populate.

Completed view of the General Tab with no 3-day waiver:

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: New Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

System

| | | | | |
|-------------------|-----------------------|------------------|------------|--------------|
| State File Number | County License Number | Application Date | Valid Date | 3 Day Waiver |
| | | 11/02/2020 | 11/06/2020 | N |
| *Filing County | Reg Type Code | Record Status | | |
| Polk | | Pending | | |

Completed view of the General Tab with a 3-day waiver:

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: New Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

System

| | | | | |
|-------------------|-----------------------|------------------|------------|--------------|
| State File Number | County License Number | Application Date | Valid Date | 3 Day Waiver |
| | | 11/02/2020 | 11/02/2020 | Y |
| *Filing County | Reg Type Code | Record Status | | |
| Polk | | Pending | | |

T

Party A & B Tab

The fields on tabs Party A and Party B are identical.
Use the below instructions for guidance on both Party A and Party B tabs.

Marriage: New

General Party A Party B Application/License Marriage Return Flags CAS Application

Party A - Current Name

Party A Designation - Optional

First Name Middle Name Current Last Name

Last Name Prior To Any Marriage Suffix

Party A - Name After Marriage

First Name Middle Name Last Name

Residence Address Information

Country State City - Optional

United States Iowa

Birthplace

Country State

United States

Date Of Birth Age Consent

Parent Names - Optional

Party A - Parent 1 Designation

Parent 1 - First Name Middle Name Last Name Prior To Any Marriage

Party A - Parent 2 Designation

Parent 2 - First Name Middle Name Last Name Prior To Any Marriage Suffix

The following are paragraphs within the Party A & B tabs:

- ✓ Party A – Current Name
- ✓ Party A – Name after Marriage
- ✓ Residence Address Information
- ✓ Birthplace
- ✓ Parent Names (optional)

Things to Remember

- **Optional** – All optional fields or paragraphs are labeled as optional.
 - *On Party A & B tabs, Party designation, city, county, gender and parent names paragraph are optional.*

Paragraphs are titles with blue writing, and separated from each other using a light blue border.

Party A or B – Current Name – Enter the current legal name in each field listed

- ✓ First Name
- ✓ Middle Name (if applicable)
- ✓ Current Last Name
- ✓ Last Name prior to any marriage (generally, this is the name on birth certificate)
- ✓ Suffix (if applicable)

Party A or B – Name after marriage

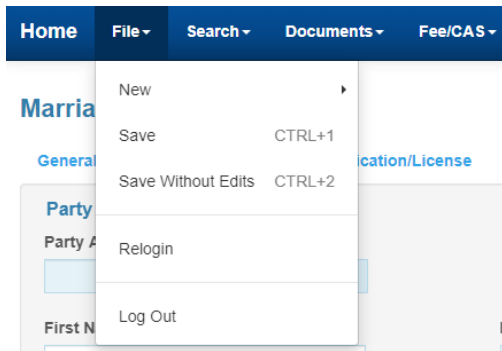
- ✓ First Name
- ✓ Middle Name (if applicable)
- ✓ **New** Last Name
- ✓ Suffix (if applicable)

As a convenience, the first and middle name entered in the Current Name fields will default to the Name After Marriage fields.

You must enter the Last Name in the Name After Marriage field.

Things to Remember

- **Name after marriage** – The name after marriage is the legal name of the individual once they get married. Either party to a marriage can change any part of their name through the marriage process. It will take a Legal Change of Name court action to change the Name After Marriage once the marriage ceremony has been performed.
- **Designation** – Designation of Bride, Groom or Spouse is optional and not required.



Save without Edits – To save a marriage event without completing the event and signing the license as complete, you must enter at a minimum:

- Application Date
- Party A – Current Name
- Party B – Current Name
 - Once these fields have been entered, click **File>Save without edits**

Residence Address Information

Country: State: City - Optional: County - Optional:

Birthplace

Country: State:

Date Of Birth: Age: Consent: Gender - Optional:

Party A or B – Residence Address Information

- ✓ Country and State - currently Country and State defaults to United States and Iowa. This information is to be changed to the appropriate location as needed.
- ✓ City and County – Choose the city and county from the drop-down list.

Party A or B – Birthplace

- ✓ Country and State - currently Country and State defaults to United States and Iowa. This information is to be changed to the appropriate location as needed.
- ✓ Enter the date of birth. The age will autocalculate.
 - *If either party to be married is 16 or 17, they must submit a Consent to Marry form, and the Consent box must be marked with a 'Y'.*
 - *If either party is under the age of 16, the system will not allow the marriage license to be signed as complete.*
- ✓ Enter gender as 'M' for male, 'F' for female, 'U' for unknown.

Things to Remember

- **Location drop-down lists** – If a country, state, or city is missing from the dropdown list, enter the location in the field (the field turns orange). Also, call the IVES Help Desk to have it added.
- **Consent** – The consent box will gray-out if the person to marry is 18 or older. The consent box must be completed if the person is 16 or 17 years old.
- **Gender** - Gender is optional and self-reported. Options are F, M, U.

Completed view of Party A or B tab age 18 or older:

Residence Address Information

Country: United States | State: Iowa | City - Optional: Waukee | County - Optional: Dallas

Birthplace

Country: United States | State: California

Date of Birth: 04/05/1996 | Age: 24 | Consent: | Gender - Optional: F

Completed view of Party A or B tab age 16 or 17 requiring a Consent to Marry form:

Residence Address Information

Country: United States | State: Iowa | City - Optional: Clive | County - Optional: Dallas

Birthplace

Country: United States | State: Florida

Date of Birth: 06/05/2003 | Age: 17 | Consent: Y | Gender - Optional: M

Validation Errors

Party A > Birthplace > Consent
Must be 18 and at least 16 years of age. Consent to Marriage is required.

R O Q Bypass: 1 2 3 4

A validation error will appear if the consent field is left blank. Click on the **R** to rekey.

Parent Names - Optional

Party A - Parent 1 Designation

Parent 1 - First Name Middle Name Last Name Prior To Any Marriage Suffix

Party A - Parent 2 Designation

Parent 2 - First Name Middle Name Last Name Prior To Any Marriage Suffix

Party A & B Tabs:

Parent Names (optional):

- ✓ Parent designation is Father, Mother, Parent and is optional
 - To leave field blank, tab out of parent designation field
- ✓ Enter at a minimum:
 - Parent 1 First Name
 - Parent 1 Last Name prior to any marriage
 - Parent 2 First Name
 - Parent 2 Last Name prior to any marriage

Things to Remember

- **Optional** – Listing parents are optional
 - Not all applicants have two parents, and it is possible for someone to not have parents.
- **Who should be listed as a parent** – The parties to marry can list anyone as their parent.
 - The applicant can enter one or both parents regardless of birth certificate information. It is not required to list two parents on marriage documents.
 - It is recommended to list the parent/parents as stated on birth certificate.
 - If they choose to list someone who is not listed on their birth certificate, the applicant needs to consider how this will impact them when applying for identification documents (drivers license and passport).

Application/License Tab

Marriage: New

0 Image count: 0 Notes count: 0 Alerts: 0

General Party A Party B **Application/License** Marriage Return Flags CAS Application

Social Security Numbers

Add SSN For Party A

Add SSN For Party B

Anticipated Ceremony Information - Optional

Ceremony Date

Officiant

License Complete

License Completed?

Date Completed

Completed By

State Use Only

Application/License Tab:

Social Security Numbers:

- ✓ Each "Add SSN for Party" button works the same
- ✓ System accounts for persons with no social security number
- ✓ You can correct a SSN once entered.
- ✓ The system hides the SSN after the number has been entered.
- ✓ The system asks for verification that the correct number has been entered.

Anticipated Ceremony:

- ✓ Both the Anticipated Ceremony Date and Anticipated Officiant are optional

Anticipated Ceremony:

- ✓ Once the license box is marked 'Y' for complete, any errors or missing information will be displayed on the right hand side of the page.
- ✓ If the application is error-free, tab out of the License complete box and the Date Completed and Completed By will auto populate.

How the Add SSN buttons work

Click the Add SSN Party A button

Marriage: New

General Party A Party B **Application/License** Marriage Return Flags CAS Application

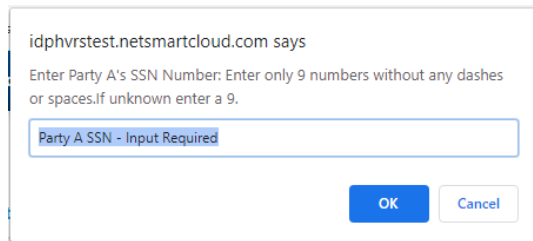
Social Security Numbers

Add SSN For Party A

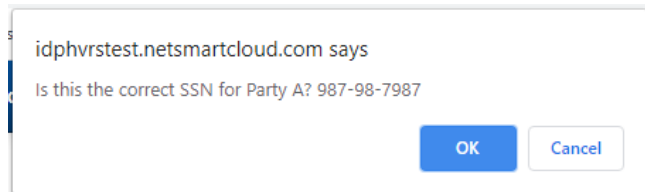
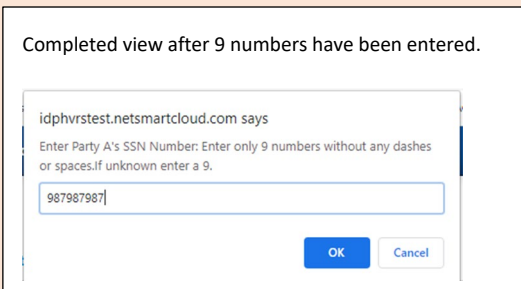
Add SSN For Party B

Add SSN For Party A

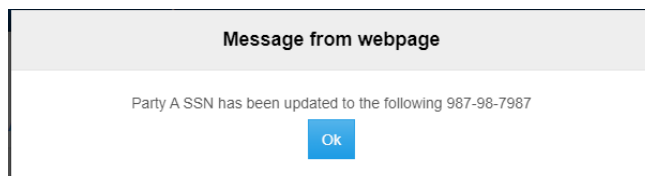
Add SSN For Party B



- ✓ The dialog box appears that asks for the party's social security number.
- ✓ A total of 9 numbers can be entered.
- ✓ You will receive an error if you do not enter enough numbers or too many numbers.
- ✓ Do not use any dashes or spaces.
- ✓ Click OK when finished.



- ✓ Once the SSN is entered, and you click OK, a dialog box will appear that repeats the number.
- ✓ If the SSN is correct, click the **OK** button.
- ✓ If the SSN is not correct, click the **Cancel** button and reenter.



- ✓ This dialog box appears showing that a SSN has been successfully entered for Party A.
- ✓ Click the **OK** button.

Repeat same process for Party B.

SSN Edits

idphvrstest.netsmartcloud.com says

The SSN has already been entered, do you want to continue and overwrite the existing SSN?

OK Cancel

If you click on a Add SSN button after the number has been successfully entered, the following dialog box appears.

- ✓ Click the **OK** button correct the number;
- ✓ Click the **Cancel** button to exit.

idphvrstest.netsmartcloud.com says

Enter Party A's SSN Number: Enter only 9 numbers without any dashes or spaces.If unknown enter a 9.

9

OK Cancel

If someone does not have a SSN, enter the number '9' and click the **OK button.**

idphvrstest.netsmartcloud.com says

You have indicated that Party A's SSN is unknown, is this correct?.

OK Cancel

The following dialog box states that 'You have indicated that Party A/B's SSN is unknown, is this correct?'

- ✓ Click the **OK** button if correct
- ✓ Click the **Cancel** button if it is not correct, and re-enter number.


Message from webpage

Party A SSN has been updated.

Ok

The following dialog box will appear stating that the SSN has been updated.

Anticipated Ceremony Information - Optional

Ceremony Date 

Officiant

Anticipated Ceremony Date & Anticipated Officiant

- ✓ Enter the anticipated ceremony date if known
 - The date must be equal to or greater than the valid date of the marriage application.
- ✓ Enter the anticipated officiant

Things to Remember


- **License Complete field**
 - You **must** tab through the Anticipated Ceremony date and Anticipated Officiant fields for the License Complete field to open for entry.
 - The License Complete field will not open if required information is missing. Complete all required fields.

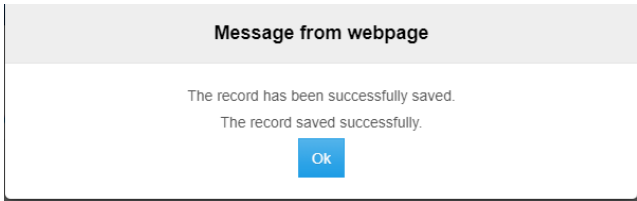
License Complete

License Completed?

State Use Only

License Complete

- ✓ Review all tabs for correct and accurate information
- ✓ Enter a 'Y' in the License Completed field and tab.
 - If there are no errors with the record, the current date and user name will default in the next fields.
 - If there is missing information that is required, a pop up will appear directing the user to correct or add information.
- ✓ Click on the  button in the top right corner.



The following dialog box will appear stating the record has been successfully saved. Click Ok button.

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

179

Marriage: 25695 Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

System

State File Number

County License Number 077-2020000168

Application Date 11/17/2020

Valid Date 11/21/2020

3 Day Waiver N

*Filing County Polk

Reg Type Code

Record Status Pending

The license will receive a County License #. The County License # can be found on the General Tab.

CAS Application Tab

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: 25696

0 Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

Create CAS Application & Request

Create CAS Application Under Which Name?
A

First Name: Bugs Last Name: Bunny Pickup Or Mail Certificate: Mail

Country: United States State: Iowa City:

Address: Zipcode:

Create Application & Request Total Amount Owed
Create Application & Request

Remove Waiver
Remove Waiver

Payment

Payment Type Check/MO Number Amount

Add Payment Print Request Receipt
Add Payment Print Request Receipt

Add Certificate to Request

Pickup Or Mail Certificate: Mail Address Change?: N

Country: United States State: Iowa City:

Address: Zipcode:

Add Certificate To Request Certificate Added To Request?
Add Certificate To Request

CAS IDs

| ApplicantID | RequestID | PaymentID | CAS Created By |
|-------------|-----------|-----------|----------------|
| | | | |

CAS Application – You must create a CAS Application and add the payment from the Marriage Module for ALL marriage licenses issued. DO NOT create CAS application through the FEE/CAS Application menu.

Create CAS Application & Request

1. Party A's name auto populates in the field but can be switched to Party B by change the "A" in the to a "B" in the dropdown.
2. Enter the mailing address.
3. Click **Create Application & Request** button

The total amount owed will autocalculate and the record is autosaved.

| Create Application & Request | Total Amount Owed |
|---|-------------------|
| Create Application & Request | \$35.00 |

Payment:

1. Choose Payment Type; enter Check/MO number is required; enter amount collected.
2. Click **Add Payment** button.
3. Dialog box will appear stating the record has been successfully saved. Click the "OK" button.

Message from webpage

Payment has been added to CAS.
Applicant has been Completed.

OK

The application ID is at the bottom of the screen under paragraph CAS IDs.

Completed view of CAS Application

Marriage: 25697

Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

Create CAS Application & Request

Create CAS Application Under Which Name?
A

First Name: Mister
Last Name: Potato Head
Pickup Or Mail Certificate: Mail

Country: United States
State: Iowa
City: Waukee

Address: 20 Spud Ave
Zipcode: 50263

Create Application & Request: **Create Application & Request** | Total Amount Owed: \$0.00

Remove Waiver: **Remove Waiver**

#1: Applicant and Mailing

#2: Click Create Application & Request

Payment

Payment Type: Cash
Check/MO Number:
Amount: \$35.00

Add Payment: **Add Payment** | Print Request Receipt: **Print Request Receipt**

#3: Add payment type and amount

#4: Click Add Payment button

Add Certificate to Request

Pickup Or Mail Certificate: Mail
Address Change?: N

Country: United States
State: Iowa
City:
Address:
Zipcode:

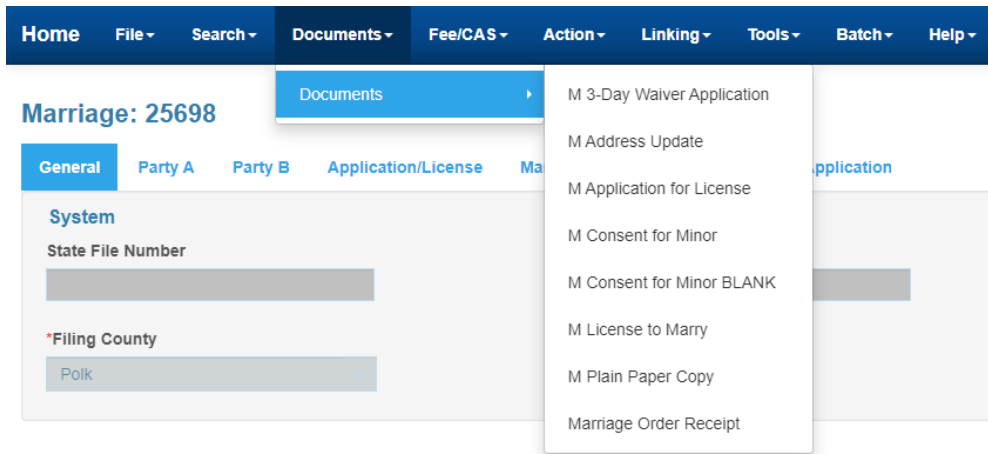
Add Certificate To Request: **Add Certificate To Request**

Do Not click Add Certificate to Request at this point!

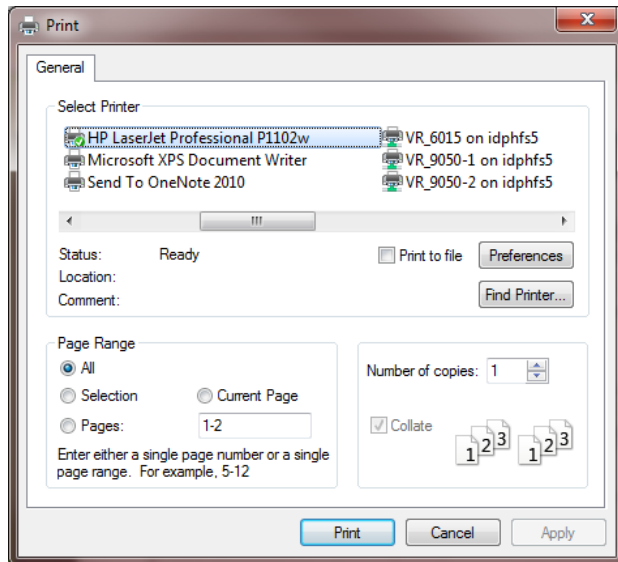
CAS IDs

| | | | |
|-------------|-----------|-----------|-----------------|
| ApplicantID | RequestID | PaymentID | CAS Created By |
| 12185 | 13174 | 9661 | Nichols, Sammul |

Printing Marriage Documents

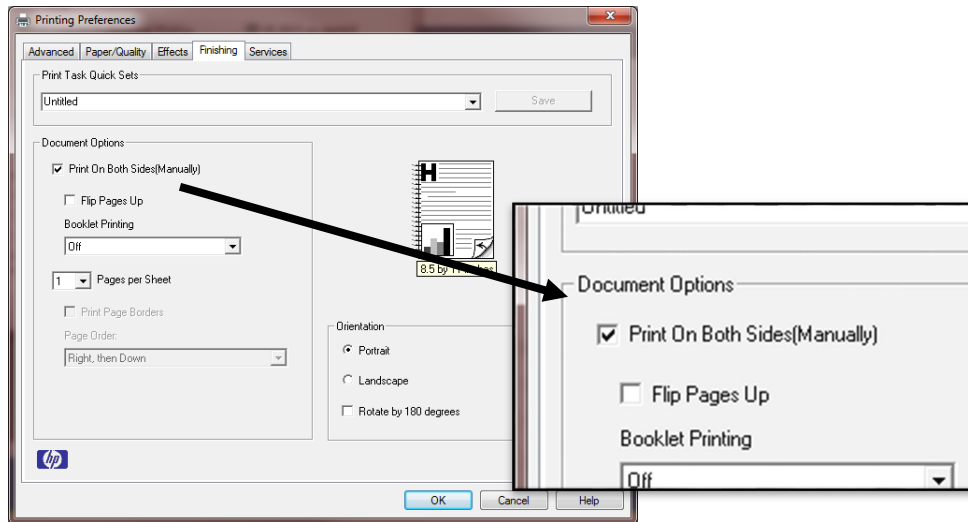


After the CAS Application has been created and the payment entered, documents will be available to print from the Documents menu.



Printing Options for Specific Documents

- ✓ There are 2 two-sided documents that are available print from the marriage event: application to marry; Certificate of Marriage.
- ✓ If you choose either of these documents to print, you will get a pop-up box of ***your printer's*** default preferences. (Not all dialog boxes will appear as the image above.)
- ✓ Verify the printer, and click the Preferences button.
- ✓ Use the tabs to locate the Print on Both Sides or Print Double Sided option; choose this option to print that document on both sides.
- ✓ Click OK; Print
 - If you have a printer that does NOT print on both sides, follow the above process. The first page of the document will print; put the print document back in the printer (bi-pass or tray) to print the second page.



Remember: Your print boxes may look different than the above images.

Things To Remember:

- ✓ Marriage regulations have not changed. All the same documents are needed to process a marriage.
- ✓ Print the appropriate documents from the Documents print menu.
 - If you do not need a 3-day waiver or Consent for Minor, do not print them.
 - All documents will be available for every record created.

Fix a Mistake prior to the Marriage Return

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: 25694 Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

Social Security Numbers
Add SSN For Party A Add SSN For Party B

Anticipated Ceremony Information - Optional
Ceremony Date Officiant

License Complete
License Completed? Date Completed Completed By
State Use Only

If a spelling mistake or any other errors were found prior to the couple getting married.

Go to the Application/License tab. Change the "Y" in the License Completed field to an "N". *This removes the date, user's name and open all the fields.*

Make the necessary change(s).

Go to the Application/License tab. Change the "N" in the License Completed field to a "Y" and tab out of the field.

Click the button and reprint the documents.

Adding Waiver from Marriage Record and CAS

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: 25694

Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B **Application/License** Marriage Return Flags CAS Application

Social Security Numbers

Add SSN For Party A Add SSN For Party B

Anticipated Ceremony Information - Optional

Ceremony Date Officiant

License Complete

License Completed? Y Date Completed 20/20/1117 Completed By Nichols, Sammul

State Use Only

Adding 3-day waiver

Open up the marriage event, go to the Application/License tab.

On the License Completed field change the “Y” to a “N”. This removes the date, user’s name and open all the fields including the 3 Day Waiver field on the General tab.

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: 25697

Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

System

State File Number County License Number 077-2020000170 Application Date 11/17/2020 Valid Date 11/21/2020 3 Day Waiver N

*Filing County Polk Reg Type Code Record Status Pending

Go to the General tab. Change the “N” to a “Y”, click out of the 3 Day Waiver field, the Valid Date field will change to the appropriate validation date.

Application Date 11/17/2020 Valid Date 11/17/2020 3 Day Waiver Y

Marriage: 25697

Image count: 0 Notes count: 0 Alerts: 0 Save

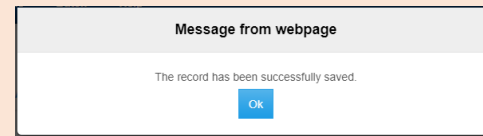
General Party A Party B **Application/License** Marriage Return Flags CAS Application

Social Security Numbers
 Add SSN For Party A Add SSN For Party B
 Add SSN For Party A Add SSN For Party B

Anticipated Ceremony Information - Optional
 Ceremony Date: 01/01/2021
 Officiant: Woody

License Complete
 License Completed? N
 Date Completed: [Calendar Icon]
 Completed By: [Text Field]
 State Use Only: X

Go back to the Application/License tab. Change the "N" to a "Y".
 Click the **Save** button.
 Dialog box will appear stating the record has been successfully saved. Click the "OK" button.



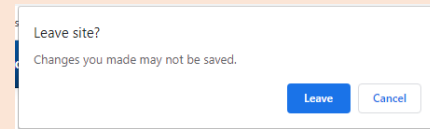
Marriage: 25697

General Party A Party B **Application/License** Marriage Return

Social Security Numbers
 Add SSN For Party A Add SSN For Party B
 Add SSN For Party A Add SSN For Party B

- Applicant
- To Marriage Change Request

Linking to Fee/CAS Record:
 From the marriage event, click **Linking > Applicant**
 Dialog Leave site message appears. Click the "Leave" button.



Linking: Applicant

Search Criteria Search Result

Flat View Export Display

Group By:

| Date Application | Applicant Number | Status | Priority | Date Received | Req or Appl First Name | Req or Appl Last Name | Company/Agency |
|------------------|------------------|-----------|----------|---------------|------------------------|-----------------------|----------------|
| 11/17/2020 | 12185 | Completed | NORMAL | | Mister | Potato Head | |

1 - 1 of 1 items

Double click on the application result or click on the **Display** button to get to the Application request.

Payment Information

| Payment Date | Payment Type | Check Num | Amount | Applicant ID | Payment ID | Modify Date | Create Date | Retur... |
|--------------|--------------|-----------|----------|--------------|------------|-------------|-------------|----------|
| 11/17/2020 | Cash | | \$ 35.00 | 12185 | 9661 | 11/17/2020 | 11/17/2020 | |

1 - 1 of 1 Items

Display

Clear Payment Fields

Clear Payment Fields

Payment Date: 11/18/2020

Payment Amount: \$0.00

Payment Type: [Dropdown]

Check/CC/MO #: [Input]

Add Payment

Adding Payment

Click the **Clear Payment Fields** button this.

The Payment Date will pre-populate. Choose the payment type, enter check number (if applicable) and enter amount paid.

Click the **Add Payment** button. The payment grid will reflect the payment.

Payment Information

| Payment Date | Payment Type | Check Num | Amount | Applicant ID | Payment ID | Modify Date | Create Date | Retur... |
|--------------|--------------|-----------|----------|--------------|------------|-------------|-------------|----------|
| 11/18/2020 | Cash | | \$ 5.00 | 12185 | 9665 | 11/18/2020 | 11/18/2020 | |
| 11/17/2020 | Cash | | \$ 35.00 | 12185 | 9661 | 11/17/2020 | 11/17/2020 | |

Service Information

Clear Service Fields

Clear Service Fields

Service Type: **Waiver**

Fee Type: Standard

Copies: 0

Status: PENDING

Add New Service

Next add the Service Information.

Click the **Clear Service Fields** button.

Enter or choose from the dropdown:

- Service Type: **Waiver**
- Fee Type: Standard
- Copies: 1
- Status: **Completed**

Click the **Add Service** button. The service will populate in the grid on the Service Section.

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na... | Last Name |
|-----------|----------|------------|--------------|-----------|
| 1377197 | MARRIAGE | Alicia | | Collier |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status |
|-----------|------------|--------------|----------|--------|----------|--------|
| 1377197 | MARRIAGE | Application | Standard | 1 | \$ 35.00 | COM |

SERVICES

Search For Event Record

Refresh Grids

| Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... | RequestID |
|------------|--------------|----------|--------|----------|-----------|------|-----------|
| MARRIAGE | Application | Standard | 1 | \$ 35.00 | Completed | Y | 13174 |
| Marriage | Waiver | Standard | 1 | \$ 5.00 | Completed | Y | 13174 |

Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Remove Waiver from Marriage Record and CAS

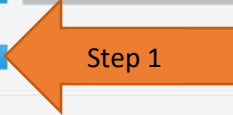
Marriage: 25699

General Party A Party B Application/License Marriage Return Flags CAS Application

Create Application & Request Total Amount Owed

Create Application & Request \$40.00

Remove Waiver

Remove Waiver 

Payment

Payment Type Check/MO Number Amount


Cash \$40.00

Add Payment Print Request Receipt

Add Payment Print Request Receipt

Removing 3-day waiver

Open up the marriage event, go to the CAS Application tab. On the CAS Application tab:

1. Click on the Remove Waiver button which will change the Total Amount Owed from \$40 to \$35.
2. Message pop-up stating the Waiver Service was removed from order > click OK
3. Go to the Payment paragraph>change the Amount to \$35.
4. Click  button.
5. Message pop-up stating the record has been successfully saved > click OK

Marriage: 25699

General Party A Party B Application/License

Create Application & Request Total Amount Owed

Create Application & Request \$35.00

Remove Waiver

Remove Waiver

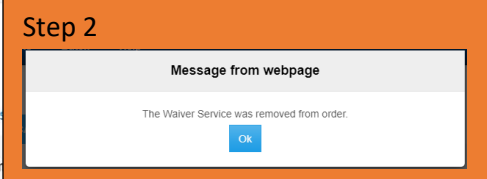
Payment


Payment Type Check/MO Number Amount

Cash \$35.00


Add Payment Print Request Receipt


Add Payment Print Request Receipt





Note: The General tab will show the 3 Day Waiver box changed from a "Y" to a "N" and the Valid Date field will also change to the appropriate validation date.





Step 5

The record has been successfully saved.

OK

General Party A Party B Application/License Marriage Return Flags CAS Application

System

State File Number County License Number Application Date Valid Date 3 Day Waiver

077-202000172 11/18/2020 11/18/2020 N

*Filing County Reg Type Code Record Status

Polk Pending

- Home
- File
- Search
- Documents
- Fee/CAS
- Action
- Linking
- Tools
- Batch
- Help

General Party A Party B Application/License Marriage Return

Create CAS Application & Request

Step 6

Applicant

To Marriage Change Request

On the CAS Application tab of the marriage record:

- Go up to the Linking menu > click on Applicant
- Dialog Leave Site message appears > Click Leave.

Applicant: 395958

Application Request to Inventory Mailing Billing Reassign Request Flags Return & Notes Marriage Returns

*First Name Middle Name

Silver

Country State Name

United States

Address 2 Zipcode Phone - Primary Fax - If Applicable Email

Is Applicant Address Same As Mailing?

Total \$ Charged - Total \$ Paid = Amount Due

\$40.00 \$40.00 \$5.00

Step 7

Leave site?

Changes you made may not be saved.

Leave Cancel

On the Request to Inventory tab, the service now shows \$35 w/the removal of the \$5 waiver service.

SERVICES

Search For Event Record Refresh Grids

Search For Event Record Refresh Grids

| Event Type | Service Type | Fee Type | Copies | \$Total | Status | C | RequestID |
|------------|--------------|----------|--------|----------|-----------|---|-----------|
| MARRIAGE | Application | Standard | 1 | \$ 35.00 | Completed | Y | 13179 |

Payment Information

| Payment Date | Payment Type | Check Num | Amount | Applicant ID | Payment ID | Modify Date | Create Date | Retur... |
|--------------|--------------|-----------|----------|--------------|------------|-------------|-------------|----------|
| 07/15/2016 | CREDIT CARD | | \$ 40.00 | 395958 | 349254 | 02/25/2021 | 07/15/2016 | |

Clear Payment Fields

Clear Payment Fields

Payment Date Payment Amount

07/15/2016 \$40.00

Payment Type Check/CC/MO #

CREDIT CARD

Update Payment Update Payment

Step 8

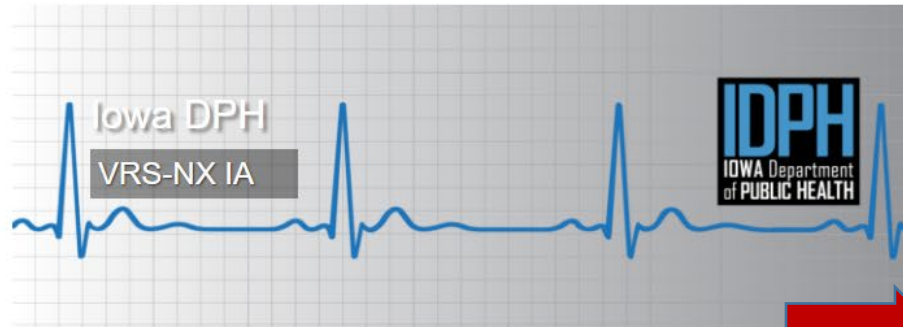
Step 9

Change the payment to reflect the amount.

- Go to the Payment Information paragraph. Change the payment amount from \$40 to \$35.
- Click the **Update Payment** button.
- Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Marriage Return

Certificate of Marriage is signed and returned to the issuing office for filing.



Work Queues

| |
|-----------------------------|
| CAS Requests Pending |
| M App Pending |
| M Change Request - Pending |
| M Change Request - Rejected |
| M Pending Marriage Return |
| Verification - Completed |
| Verification - Pending |

On the Home page, go to the Work Queues located on the right side of the page.

Click **M Pending Marriage Return**.

enable more Work Queues; a few are working, and we will slowly monitor system performance. Records are still accessible by going through the Search menu - not all fields are required to search.

Messages

| From | Subject | Message | Received | Event | Local File Number |
|------|---------|---------|----------|-------|-------------------|
|------|---------|---------|----------|-------|-------------------|

No messages to show.

Marriage Return Tab

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: 25697 Image count: 0 Notes count: 0

General Party A Party B Application/License **Marriage Return** Flags CAS Application

Filing

Date Of Marriage

State Of Marriage Iowa

Place Of Marriage - County

City/Town

Date Filed

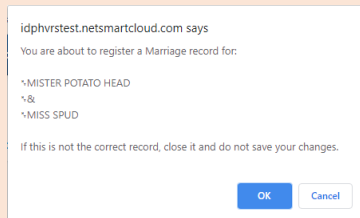
Record Completed?

Date Completed

Completed By

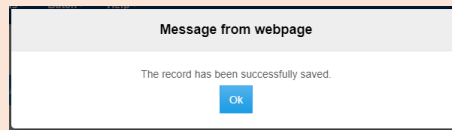
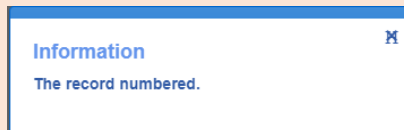
Marriage Return:

1. On the Marriage Return tab, enter the Date of Marriage.
2. Pop up message will appear to verify the correct couple is being registered. Click the **OK** button.



State of Marriage defaults to Iowa (Marriage must have occurred in Iowa).

3. Enter the Place of Marriage – County
4. Enter the City/Town
5. Enter the Date Filed
6. Enter 'Y' for Record Complete and tab out of field. *The **Date Completed** and **Completed By** will default with the current date and the user's name.*
7. Pop up messages appear; states the record has been numbered and the record has successfully saved. **Click OK.**



8. **Go to the CAS Application tab**

CAS Application Tab after Marriage Return Filed

Marriage: 25697

Image count: 0 Notes count: 0 Alerts: 0 Save

General Party A Party B Application/License Marriage Return Flags CAS Application

Create CAS Application & Request
Create CAS Application Under Which Name?
A

First Name: Mister
Last Name: Potato Head
Country: United States
State: Iowa
Address: 20 Spud Ave
Zipcode: 50263
Pickup Or Mail Certificate: Mail
City: Waukee

Create Application & Request Total Amount Owed
Create Application & Request \$0.00
Remove Waiver
Remove Waiver

New Address?
If the address of the couple has change, enter the new address here. The address will change in CAS.

Payment

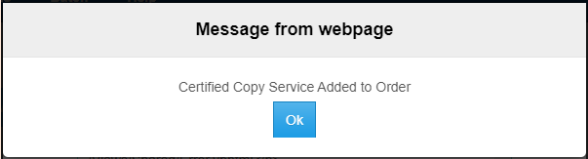
Payment Type: Cash
Check/MO Number:
Amount: \$35.00

Add Payment Print Request Receipt
Add Payment Print Request Receipt

Add Certificate to Request

Pickup Or Mail Certificate: Mail
Address Change?: N
Country: United States
State: Iowa
City:
Address:
Zipcode:
Add Certificate To Request Certificate Added To Request?
Add Certificate To Request

Add the No Fee Certified Copy Request to the CAS Application
On the Add Certificate to Request paragraph, click on the **Add Certificate To Request** button.
✓ You can only click this button once. If the couple wants more than one certified copy, all additional requests must be entered into CAS manually.
Pop up message confirming the certified copy service has been added. Click OK.



CAS IDs

| ApplicantID | RequestID | PaymentID | CAS Created By |
|-------------|-----------|-----------|----------------|
| 12185 | 13174 | 9661 | Nichols, Sammi |

Home File Search Documents Fee/CAS Action Linking Tools Batch Help

Marriage: 25699

General Party A Party B Application/License Marriage Returns

Create CAS Application & Request

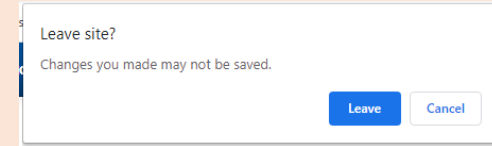
Applicant
To Marriage Change Request

Next link to the CAS Application

From the marriage event:

Go up to the **Linking** menu > click on **Applicant**.

Dialog Leave site message appears. Click the Leave button.



CAS Application: Printing the Initial No Fee Certified Marriage Certificate

Home File Search Documents Fee/CAS Action Linking Tools Batch Administration Help

Applicant: 1276701

Application Request to Inventory Mailing Billing Reassign Request Flags Return & Notes Marriage Returns

Self Silver Nichols

Update Request
Update Request

Service Information
Clear Service Fields
Clear Service Fields

Service Type: Certified Copy
Fee Type: No Fee
Copies: 1
Status: PENDING

Update Service
Update Service

Requests/Services/Inventory Information

| REQUESTS | | | | | SERVICES | | | | | | | |
|-----------|----------|------------|--------------|-----------|-----------|------------|----------------|----------|--------|----------|-----------|------|
| RequestID | Event | First Name | Middle Na... | Last Name | RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C... |
| 1377138 | MARRIAGE | Silver | | Nichols | 1377138 | MARRIAGE | Application | Standard | 1 | \$ 35.00 | COMPLETED | Y |
| | | | | | 1377138 | MARRIAGE | Certified Copy | No Fee | 1 | \$ 0.00 | PENDING | Y |

Search To Print Event Record
Search To Print Event Record

Inventory Begin #
Inventory End #
Use Inventory
Use Inventory

CAS Application

On the CAS Application, click on the **Request to Inventory** tab.
The No Fee pending service has been added to the request.

On the Requests/Service/Inventory Information paragraph:

- Click the No Fee pending service grid
- Click the **Search To Print Event Record** button.

Linking: Event Search MARRIAGE

Search Criteria Search Result

Flat View Export Images: 0 Notes: 0 Display

Group By:

| State File Number | Year of Marriage | Application Date | County License # | Valid Date | Filing County | Record Status | Party A - First Name |
|-------------------|------------------|------------------|------------------|------------|---------------|---------------|----------------------|
| 2021000641 | 2021 | 02/11/2021 | 077-2021001003 | 02/15/2021 | Polk | Registered | Groom |

1 - 1 of 1 items

The Search result grid for the event appears. Click the **Display** button or double click on the grid to open the record.

DO NOT PRINT FROM THE SEARCH SCREEN.

Search Documents Fee/CAS Action Linking Tools Batch

43408

Documents

- M 3-Day Waiver Application
- M Address Update
- M Application for License
- M CERT COPY MARRIAGE COUNTY**
- M Certificate of Marriage
- M Consent for Minor
- M Consent for Minor BLANK
- M License to Marry
- M Plain Paper Copy
- Marriage Order Receipt

The marriage record appears. Go to Documents> Documents> **M CERT COPY MARRIAGE COUNTY**

Send Email

1 / 1 100%

STATE OF IOWA
114-2021-000641
IOWA DEPARTMENT OF PUBLIC HEALTH
CERTIFICATE OF MARRIAGE
Marriage Ceremony Performed in the State of Iowa

COUNTY: Polk
LICENSE NUMBER: 077-2021001003

| PARTY NAME BEFORE MARRIAGE | FIRST | MIDDLE | LAST | SUFFIX (if any) | LAST NAME PRIOR TO MARRIAGE |
|----------------------------|-------|--------|------|-----------------|-----------------------------|
| Groom | Test | | Test | | Test |
| Bride | Test | | Test | | Test |

RESIDENCE - STATE: Iowa
RESIDENCE - COUNTY: Polk
RESIDENCE - CITY, TOWN, OR LOCATION: Des Moines


DATE OF BIRTH (or U.S.A. name of foreign source): 08/08/1989
GENDER: M

DATE OF BIRTH (or U.S.A. name of foreign source): 08/08/1989
GENDER: M

DATE OF MARRIAGE: 02/25/2021
PLACE OF MARRIAGE - COUNTY: Polk
CITY OR TOWN: Des Moines

NO NOTATIONS

The certificate will appear.

In the top right corner, click the  icon.

114-2021-000641

STATE OF IOWA
IOWA DEPARTMENT OF PUBLIC HEALTH
CERTIFICATE OF MARRIAGE
Marriage Ceremony Performed in the State of Iowa

COUNTY: Polk

License Number: 077-2021010003

| | | | | | |
|--------------------------------|--|--------|------|----------------|---------------------------------|
| PARTY A - NAME BEFORE MARRIAGE | | MIDDLE | LAST | SUFFIX, if any | LAST NAME PRIOR TO ANY MARRIAGE |
| Groom | | | Test | | Test |
| PARTY B - NAME BEFORE MARRIAGE | | MIDDLE | LAST | SUFFIX, if any | LAST NAME PRIOR TO ANY MARRIAGE |
| Bride | | | ABC | | ABC |

RESIDENCE - STATE: Iowa
RESIDENCE - COUNTY: Polk
RESIDENCE - CITY, TOWN, OR LOCATION: Des Moines

DATE OF BIRTH (of not in U.S.A., name of foreign country): 05/06/1996
GENDER: Male

DATE FILED (Month, Day, Year): 02/25/2021
FILED BY (Name): [Signature]
PLACE OF MARRIAGE - COUNTY: Polk
CITY OR TOWN: Des Moines

NO NOTATIONS

2/25/2021
DATE ISSUED

COUNTY REGISTRAR
County of Linn, Iowa

DEPUTY STATE REGISTRAR
[Signature]

Print 1 sheet of paper

Destination: HP LaserJet Professional

Pages: All

Copies: 1

More settings

Print Cancel

The printer dialog box will appear. *This dialog box is specific to general printing and all printers should be available.*

- Choose the correct printer from the Destination field.
- Enter the number of copies requested.
- *If applicable* choose additional settings based on YOUR PRINTER set up.
- Click the **Print** button.

VRS-NX Netsmart - Applicant x VRS-NX Netsmart - Linking x VRS-NX Netsmart - Marriage: 20 x Netsmart VR PDF Viewer - x

https://hrstest.netsmartcloud.com/NXDEV/report/report?selection=selection%3Dkey%253D0...%25067c10-a9da-4c77-8ba7-496847...%2527Cemail%253Dfalse%2527Cprint%253Dtrue%2527Csave%253Dfalse%2527Cevent%253DMARRIAGE%2527Ceven...

STATE OF IOWA
IOWA DEPARTMENT OF PUBLIC HEALTH
CERTIFICATE OF MARRIAGE
Marriage Ceremony Performed in the State of Iowa

COUNTY: Polk

License Number: 077-2020000167

| | | | | | |
|--------------------------------|--|--------|------|----------------|---------------------------------|
| PARTY A - NAME BEFORE MARRIAGE | | MIDDLE | LAST | SUFFIX, if any | LAST NAME PRIOR TO ANY MARRIAGE |
| Ken | | | Doll | | Doll |
| PARTY A - NAME AFTER MARRIAGE | | MIDDLE | LAST | SUFFIX, if any | LAST NAME PRIOR TO ANY MARRIAGE |
| Ken | | | Doll | | |

RESIDENCE - STATE: Iowa
RESIDENCE - COUNTY: Dallas
RESIDENCE - CITY, TOWN, OR LOCATION: Clive

DATE OF BIRTH (Month, Day, Year): 05/06/1996
GENDER: Male

DATE FILED (Month, Day, Year): 02/25/2021
FILED BY (Name): [Signature]
PLACE OF MARRIAGE - COUNTY: Polk
CITY OR TOWN: Des Moines

NO NOTATIONS

2/25/2021
DATE ISSUED

COUNTY REGISTRAR
County of Linn, Iowa

DEPUTY STATE REGISTRAR
[Signature]

Print

Once the record is printed, close all the browser tabs to get back to the **Applicant** page to enter the safety paper number and complete the application.

Applicant: 1276129

Home File Search Documents Fee/CAS Action Linking Tools Batch Administration Help

Image count: 0 Notes count: 0 Alerts: 0

Application Request to Inventory Mailing Billing Reassign Request Flags Return & Notes Marriage Returns

Self Charles Abell PENDING

Update Request
Update Request

Service Information
Clear Service Fields

Service Type Certified Copy Fee Type No Fee Copies 1 Status PENDING Cost \$0.00

Update Service
Update Service

Requests/Services/Inventory Information

REQUESTS

| RequestID | Event | First Name | Middle Na. | Last Name |
|-----------|----------|------------|------------|-----------|
| 1376562 | MARRIAGE | Charles | | Abell |

SERVICES

| RequestID | Event Type | Service Type | Fee Type | Copies | \$Total | Status | C. |
|-----------|------------|----------------|----------|--------|----------|-----------|----|
| 1376562 | MARRIAGE | Application | Standard | 1 | \$ 35.00 | COMPLETED | Y |
| 1376562 | MARRIAGE | Certified Copy | No Fee | 1 | \$ 0.00 | PENDING | Y |

1 - 2 of 2 Items

Search To Print Event Record
Search To Print Event Record

Inventory Begin #
Inventory End #

Use Inventory
Use Inventory

© 2021 Nelnet Technologies, Inc.

On the Application, click on **Request to Inventory** tab.

On the bottom right of the Requests/Services/Inventory Information paragraph:

- Enter the first piece of security paper number in the Inventory Begin # field.
- Enter the last piece of security paper number in the Inventory End # field. *If it is one piece of paper, enter the same number in each field.*
- Click the **Use Inventory** button. *The service grid will be marked as COMPLETED.*
- Change the Request Status Type to COMPLETED
- Click the **Update Request** button.
- Click the 'X' on the tab to close out of IVES NX or click on the Home menu to continue working in IVES NX.

Archiving and Scanning

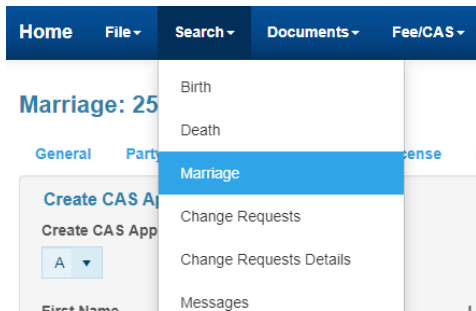
Final Steps

- ✓ Original Certificate of Marriage documents **MUST** be mailed to the State for review.
 - A copy of the original Certificate of Marriage is to be retained at the county for 6 months.
- ✓ Counties **MAY** scan all the marriage documents to IVES.
 - If the county chooses to scan and attach all marriage documents into IVES, the original documents may be destroyed AFTER the Certificate of Marriage has been filed and sent to the State.
 - Applications of license to marry are public documents once the license has been picked up or mailed to the applicants.
 - Counties need to email the State when licenses are not picked up within 6 months of the application date.
 - The State will deactivate the record.

Marriage Current Correction

County Recorders can request a current correction to a **registered marriage record** for marriage records registered in their jurisdiction. The recorders will complete a correction request and submit it to Vital Records for approval.

Current Correction is data entry error or omission made by the county at the time the event was created and within **one year of the date of the event**.



From the Home page, click **Search>Marriage**

Search (Marriage)

Enter the information into the fields. Click the **Search** button.

Search (Marriage)

Search Criteria

Search Result

Flat View Export

Images: 5 Notes: 0 Display

Group By:

| State File Number | Year of Marriage | Application Date | County License # | Valid Date | Filing County | Record Status | Party A - First Name |
|-------------------|------------------|------------------|------------------|------------|---------------|---------------|----------------------|
| | 2020 | 07/30/2020 | 077-202000097 | 07/30/2020 | Polk | | Peter |
| 2020000089 | 2020 | 11/03/2020 | 077-2020000160 | 11/03/2020 | Polk | Registered | Tinker |
| | 2020 | 08/04/2020 | 077-2020000110 | 08/04/2020 | Polk | Pending | Windy |

1 - 3 of 3 items

The search result grid shows all the marriage records that meet the search criteria.

Double click on the record of choice or highlight the record of choice and click on the **Display** button.

Home File Search Documents Fee/CAS Action Linking Tools Batch Administration Help

Marriage

General

Party A

Party B

Bride

Groom

First Name Middle Name Current Last Name

Last Name Prior To Any Marriage Suffix

New Marriage CTRL+M

Save CTRL+1

Save Without Edits CTRL+2

Change Requests

Inventory

Inventory Orders

Certified Paper Assignment

Relogin

Log Out

Tinker Bell

On the marriage record. Go to the menu and click **File > New > Change Requests**

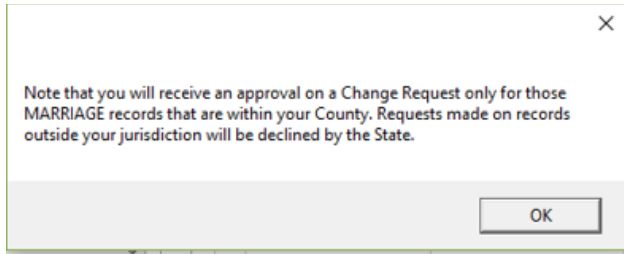
Leave site?

Changes you made may not be saved.

Leave Cancel

Message appears confirming you are leaving the current site.

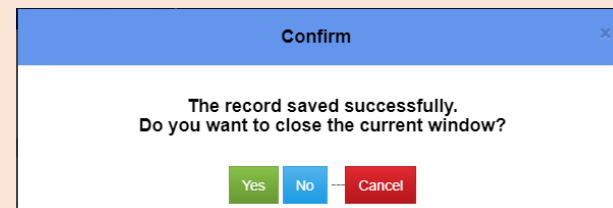
Click the **Leave** button.



Change Request window opens:

The pop up message will appear notifying counties can only request a correction for marriage records that are within their county. – Click Ok.

1. On the Modification/Correction paragraph select CORRECTION from the “Modification” dropdown field.
2. On the Documentation paragraph select ERRO-TYPO from the “Documentation Used” dropdown field.
3. Click the **Save** button.
4. Pop up message confirm the record is saved and asking if user wants to leave the current window. Click the **No** button.



Corrections

Add Item For Correction

Original Value

10/08/1997

State Approved Item?

Template For Cert Comments

Item Description

- On the Corrections paragraph, click the button.
- Select the item to be correct from the "Item Description" dropdown list.

Corrections

Add Item For Correction

Original Value

10/08/1997

State Approved Item?

Template For Cert Comments

Item Description

Party A / Birthplace / Date of Birth

Corrected Value

Print Notations On Certificate?

N

Date

11/06/2020

Save Item To Be Corrected

| Item Description | Original Entry | Corrected Entry | Approved | Print On Cert? | Wording d |
|--------------------------------------|----------------|-----------------|----------|----------------|-----------|
| Party A / Birthplace / Date Of Birth | 10/08/1997 | 10/18/1997 | Y | N | |

7. Tab to the "Corrected Value" field. *The current value of the field will display in the "Original Value" field.*

8. Enter the Corrected Value

9. Click the button.
- Grid is generated to show the item to be corrected.

If more than one item needs to be corrected, repeat steps 5 through 9 listed above. The grid at the bottom of the window will display all fields with corrections requested.

Change Requests: 2115308

Image count: 1 Notes count: 0 Alerts: 0 Save

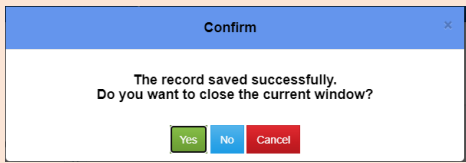
Change Request Approval Flags

Approval


Initial Entry Completed & Ready To Approve By State? Date Completed Completed By

Optional: Reason For Change


- 10. Attach the supporting documentation (Application for License to Marry OR original copy of Certificate of Marriage). See Scan & Attach process on page 46 of the manual.
- 11. Click on the Approval tab, enter Y in “Initial Entry Completed & Ready to Approve by State” field and tab to the “Date Completed” field. The system will auto-fill the date and the name of the User.
- 12. Click the **Save** button. This will route the request to Vital Records for approval.
- 13. Pop up message confirm the record is saved and asking if user wants to leave the current window. Click the **Yes** button.



Rejected Current Marriage Corrections



Work Queues

- CAS Requests Pending **98**
- CAS Requests Returns **0**
- M App Pending **8**
- M Change Request - Pending **0**
- M Change Request - Rejected **2** 
- M Pending Marriage Return **38**
- Messages **0**
- Verification - Completed **15**
- Verification - Pending **0**

If the correction request is rejected by the State, it will appear in the M Change Request-Rejected work queues.

Click on M Change Request-Rejected

Work Queue: M Change Request - Rejected

Search Criteria | Search Result

Flat View | Export

Images: 0 | Notes: 0 | Display

Group By:

| Event State File Number | First Name (Record) | Last Name (Record) | Event ID | Event Year | Create Date | Event | ModificationType |
|-------------------------|---------------------|--------------------|----------|------------|-------------|----------|------------------|
| 2020000089 | Tinker | Bell | 25686 | 2020 | 11/04/2020 | Marriage | Correction |
| 2020000089 | Tinker | Bell | 25686 | 2020 | 11/06/2020 | Marriage | Correction |
| 2020000084 | Peter | Wolf | 25620 | | 11/06/2020 | Marriage | Correction |

1 - 3 of 3 items

The search result will show a grid of all the rejected marriage correction requests.

Double click on the record of choice or highlight the record of choice and click on the Display button.

Change Request Approval



Approval

Initial Entry Completed & Ready To Approve By State? Date Completed Completed By

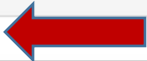
Optional: Reason For Change

Some Items Were Updated Previously? Signed? Signed By Date Signed

Go To Update Event

Remove Notations To Print On Certificate Rejected Flag

Reason/Notes For Rejection



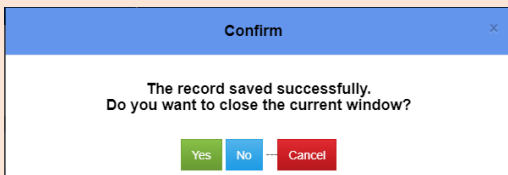
Click on the **Approval** tab. Users will notice the Y in “Initial Entry Completed & Ready to Approve by State” field has been reverted back to an N, along with the removal of the date and the person that completed the request. This allows the user to make the necessary update to the request.

Review the message in the “Reason/Notes for Rejection” field. Make the necessary change(s), which could be attaching supporting documentations to the request, adding the item to be corrected, missing item to be corrected, etc.

Once the change(s) have been corrected, go to the Approval tab, enter Y in “Initial Entry Completed & Ready to Approve by State” field and tab to the “Date Completed” field. The system will auto-fill the date and the name of the User.

Click the **Save** button. This will route the request to Vital Records for approval.

Pop up message confirm the record is saved and asking if user wants to leave the current window. Click the **Yes** button.

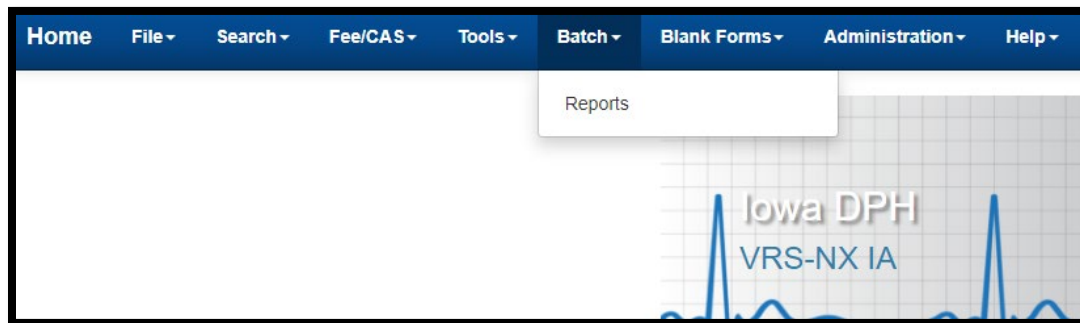


Remitting Certificate of Marriage Documents

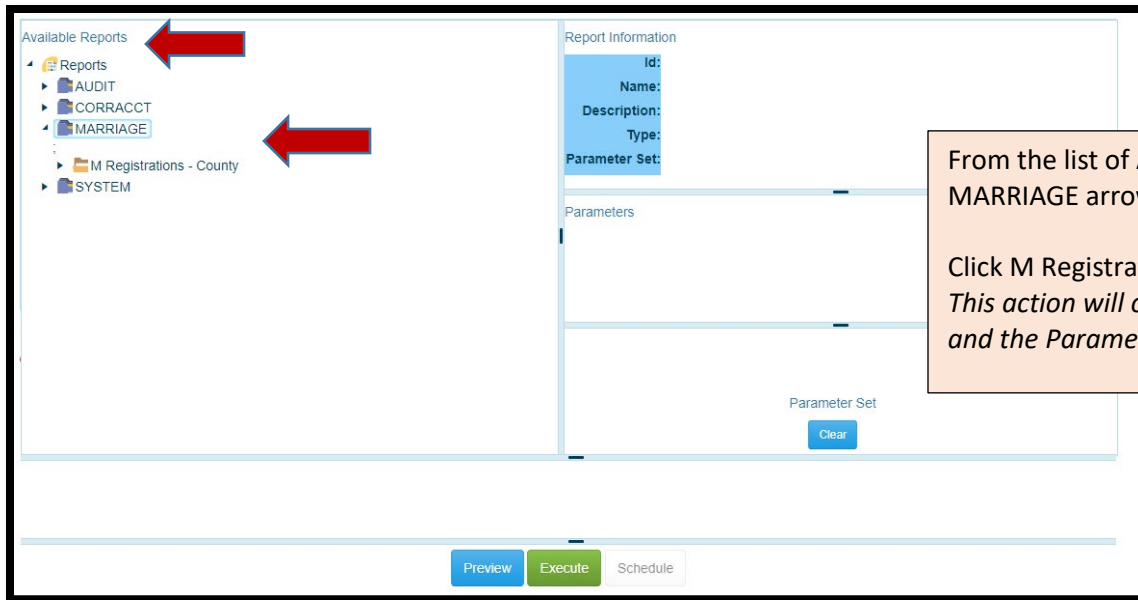
- 1) County recorders will print the Marriage Registration Report weekly in accordance with the ACH periods.
 - a) The total number of marriages filed in IVES during the ACH time period will show on the Marriage Registration Report. The total number of marriages is entered on the Weekly Transmittal Report
- 2) The Marriage Registration Report should be used to audit marriages filed during the ACH period. If a discrepancy is found during the audit, further investigation will be required to reconcile the issue.

For example, the report shows 5 marriages and you have 6 original Certificate of Marriage documents, this would indicate that one of the marriages was not marked as filed in IVES.
- 3) The Marriage Registration Report, along with all original Certificate of Marriage documents, **must be mailed to the state within 2 business days after the ACH period ends.**

Marriage Registration Report

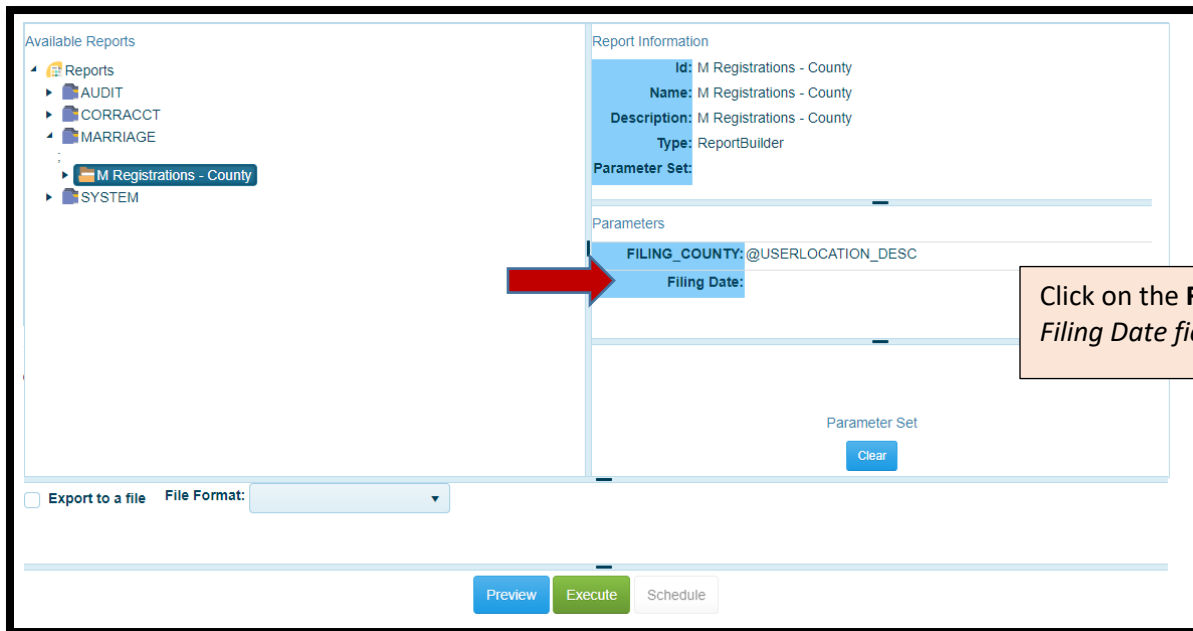


From the main menu on the Home page,
click **Batch > Reports**



From the list of Available Reports, click the MARRIAGE arrow dropdown.

Click M Registrations – County
This action will open up the Report Information and the Parameters.



Click on the **Filing Date** field. *This will open the Filing Date field.*

Entering the Filing Date:

- Enter the ACH Period in the designated field. *Users must use correct format as indicated in the instructions listed below the field. The example shows 01/08/2019,01/14/2019*
- Click **Preview** button.

| FILING DATE | DATE OF MARRIAGE | COUNTY | STATE FILE NO. | PARTY A - LAST NAME | PARTY A - FIRST NAME | PARTY B - LAST NAME | PARTY B - FIRST NAME |
|-------------|------------------|--------|----------------|---------------------|----------------------|---------------------|----------------------|
| 12/08/2020 | 12/08/2020 | Polk | - | Test | Test | Testing | Testing |
| 12/07/2020 | 12/01/2020 | Polk | 2020-000098 | Doo | Scooby | Poodle | Lady |
| 12/10/2020 | 12/10/2020 | Polk | 2020-000102 | Frozen | Elsa | Smith | King |
| 12/15/2020 | 12/15/2020 | Polk | 2020-000103 | Smith | Jared | Prump | Harriette |
| 12/15/2020 | 12/15/2020 | Polk | 2020-000104 | Abc | Abc | Bbb | Aaa |
| 12/15/2020 | 12/15/2020 | Polk | 2020-000105 | Cowboy | Woody | Peep | Bow |
| 12/15/2020 | 12/15/2020 | Polk | 2020-000106 | Jordan | Robert | Bayliss | Kelsey |
| 12/28/2020 | 12/27/2020 | Polk | 2020-000108 | Hammes | Michael | Greiner | Sarah |
| 12/28/2020 | 12/28/2020 | Polk | 2020-000109 | Jones | Taylor | Consani | Shelby |

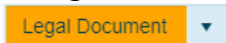
Marriage Registrations report appears. Click the print icon located in the upper right corner of the screen.

Basic Convention

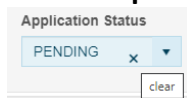
1. **Asterisk in Red** – Absolute (hard edits) required fields.
2. **Date Fields** – Slashes for date fields are masked in/just type the numerals or click on the calendar. MM/DD/YYYY
3. **Hyphen** - For any numeric fields that require hyphens are mask in – just type the numerals (i.e. Social Security Number)
4. **Tabbing** - Most efficient between fields is to tab. However, the mouse can be used to click into the next field, but validation messages may fire if the user skips around.
5. **File > Save Without Edits** - To avoid the system running through the validation edits when the record is not complete, go to the main menu bar and select save without edits.

6. **Hover** – Hovering on the field name will describe what is required in the field.

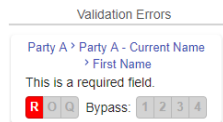
7. **Orange Field** - The orange color field indicates the item is not listed on the dropdown.



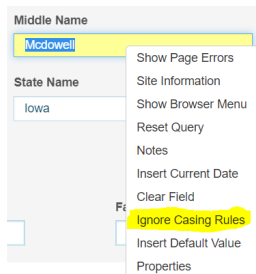
8. **Clear Dropdown Fields** – To clear the dropdown field click on the “X”.




9. **Validation** - Validation edits will fire upon existing fields, as well as upon saving a record as complete, when the data entry is incorrect.



10. **Ignore Casing Rules** - Allow users type to type a word that contains more than 1 upper case letter. The process to save the word is to right click in the field and choose Ignore Casing rules and retype the word.



Keyboard Shortcuts for Vital Records System

| | |
|--|---|
| Move to next field | Tab key |
| Move to next Tab | Ctrl - Tab Key |
| Move to previous field | Shift - Tab Key |
| Move to previous Tab | Shift - Ctrl - Tab Key |
| Move to first field of next section | Ctrl - P |
| Clear a field – clears field where cursor is | Ctrl - Z |
| Enter today's date in a date field | T |
| Select a checkbox  | Hit spacebar or click – this places a checkmark OR clears a checkmark |
| Close Window | Alt - F4 |
| Save | Ctrl – S |
| Wild Cards | Use % for wild cards (for example) Anderson could be end as (son or sen). Use wild card as “Ander%” and both results will appear. |
| Date Range Search | (MM/DD/YYYY+ MM/DD/YYYY) |