

Iowa

County Recorder User Manual

Guide in Utilizing the Iowa Vital Event System – Next Generation

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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

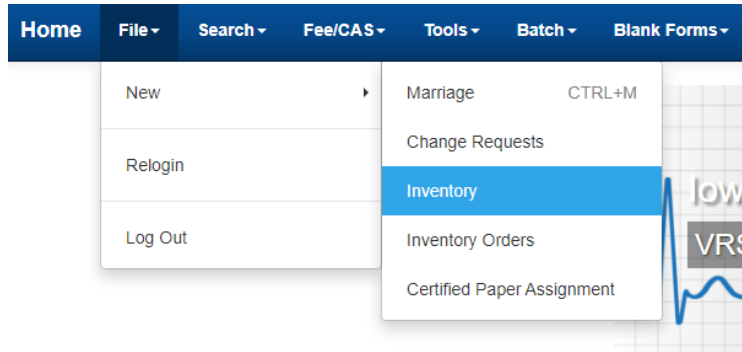
Answer your security question.

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.

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.

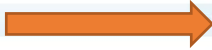



Entering Inventory

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**

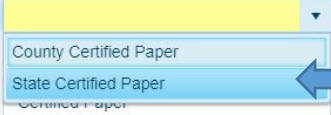


Inventory: New

Image count: 0 Notes count: 0 Alerts: 0  


Item Information Missing Stock


Item/Summary

Inventory Item	Location Of Owner	Owner
	Polk	Store
Unit	Count Per Unit	
Each		

Headerid	Quantity Ordered	Quantity Received	Quantity Shipped	Quantity Available

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**

Message from webpage

The record saved sucessfully.



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

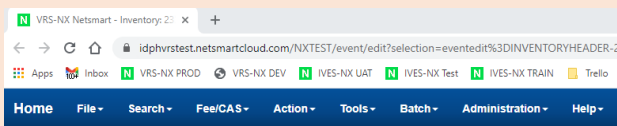
Available In Stock

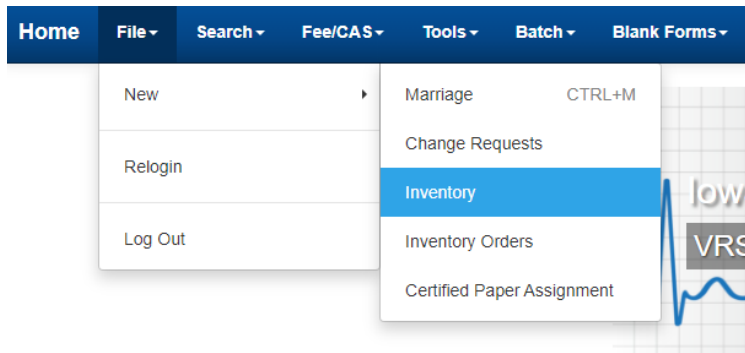
Item	Quantity	Start	End	StockID
State Certified Paper	1	888000001	888000001	417022
State Certified Paper	1	888000002	888000002	417023
State Certified Paper	1	888000003	888000003	417024
State Certified Paper	1	888000004	888000004	417025
State Certified Paper	1	888000005	888000005	417026
State Certified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

Transaction Details

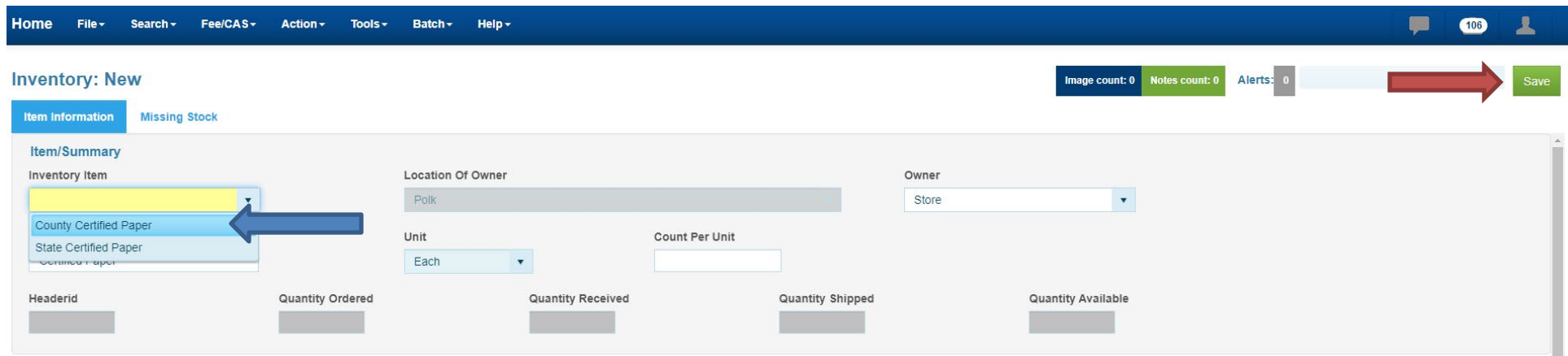
Item	Date	Transaction	Quantity	Start	End	Notes
State Certified Paper	10/12/2020	Receive	500	888000001	888000500	
State Certified Paper	10/12/2020	Split-All-To-Stock	500	888000001	888000500	

- 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**.

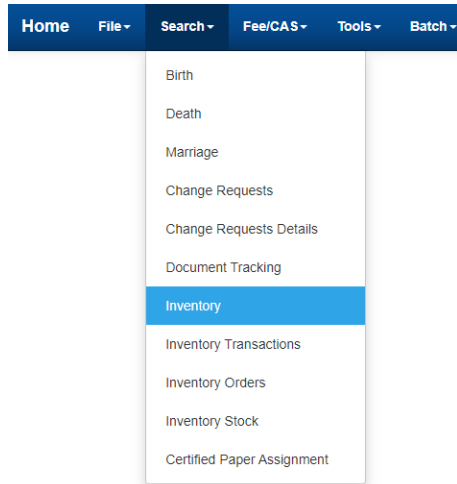
Click **SAVE** - Receive pop up message – Click **OK** and repeat the same steps as described above.

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:

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

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Search (Inventory)

Search Criteria Search Result

Images: 0 Notes: 0

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 Transaction Date: 02/15/2021 Transaction Type: **RECEIVE** 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	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

1 - 10 of 10 items

Display

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

Display

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.

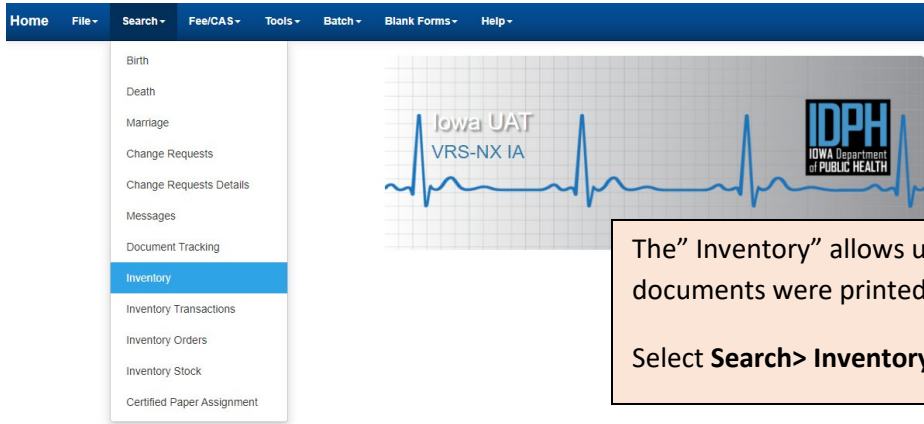
VRS-NX Netsmart - Inventory: 23

idphvrstest.netsmartcloud.com/NXTEST/event/edit?selection=eventedit%3DINVENTORYHEADER-2

VRS-NX PROD VRS-NX DEV IVES-NX UAT IVES-NX Test IVES-NX TRAIN Trello

Home File Search Fee/CAS Action Tools Batch Administration Help

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.

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

Available In Stock/Transaction Details

Available In Stock

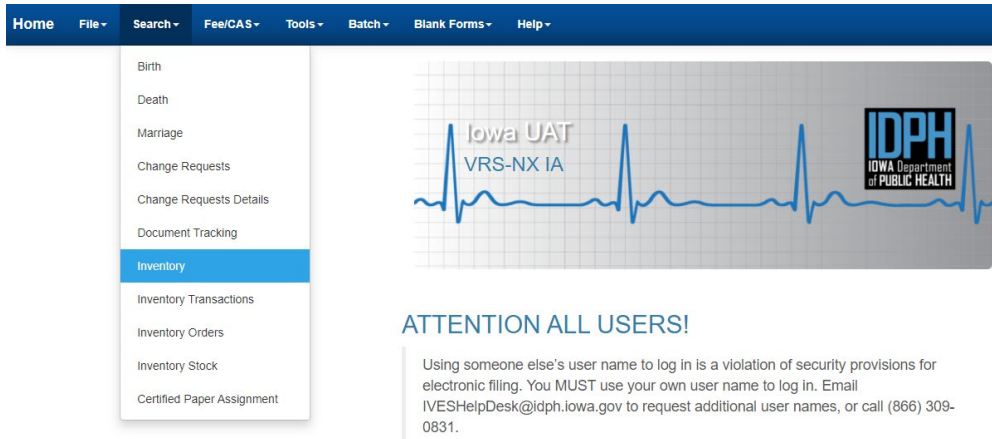
Item	Quantity	Start	End	StockID
State Certified Paper	1	1334039	1334039	418078
State Certified Paper	1	1334040	1334040	418079
State Certified Paper	1	1334041	1334041	418080
State Certified Paper	1	1334042	1334042	418081
State Certified Paper	1	1334043	1334043	418082
State Certified Paper	1	1334044	1334044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



Home File Search Fee/CAS Tools Batch Blank Forms Help

- Birth
- Death
- Marriage
- Change Requests
- Change Requests Details
- Document Tracking
- Inventory**
 - Inventory Transactions
 - Inventory Orders
 - Inventory Stock
 - Certified Paper Assignment

Iowa UAT VRS-NX IA

IDPH
IOWA Department of PUBLIC HEALTH

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 IVESHHelpDesk@idph.iowa.gov to request additional user names, or call (866) 309-0831.

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)



Search Criteria Search Result

Item: County Certified Paper, State Certified Paper

Location of Owner: On Hand

Owner: [Dropdown]

Headerid: [Text Field]

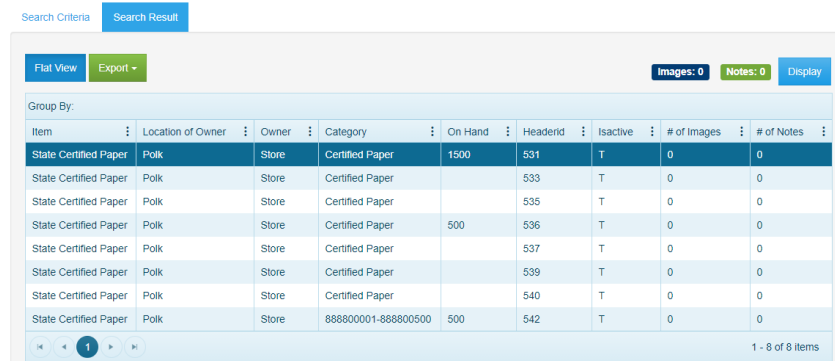
Clear Search

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

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Search (Inventory)



Search Criteria Search Result

Flat View Export

Images: 0 Notes: 0 Display

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 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 area]

Transaction

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

VOID TRANSACTION Notes: [text area]

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

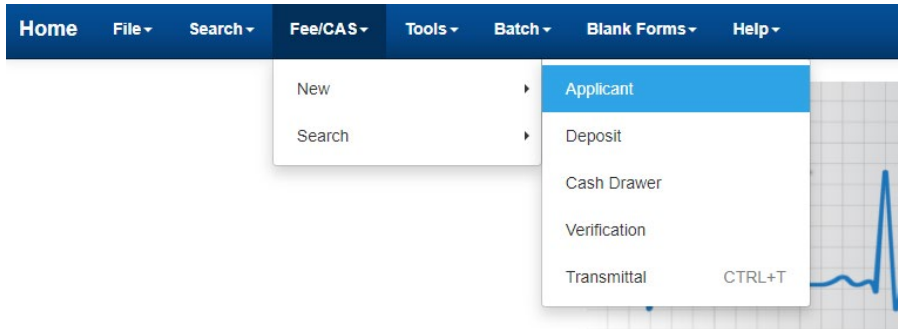
Item	Quantity	Start	End	StockID
County Certified Paper	4	880000003	880000006	418032
County Certified Paper	1	880000007	880000007	417537
County Certified Paper	1	880000008	880000008	417538
County Certified Paper	1	880000009	880000009	417539
County Certified Paper	1	880000010	880000010	417540
County Certified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



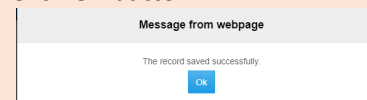
These will be vital records that users print on certified paper.

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 a summary section. The 'Application Status' section includes fields for Applicant Number, Date of Application (02/08/2021), Application Type (dropdown), Assigned To Queue, 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 summary 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 area.

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

Sam [] Testing []

Country: United States State Name: Iowa City: Waukee Address 1: 12 Street

Address 2: [] Zipcode: 50263 Phone - Primary: [] Fax - If Applicable: [] Email: []

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

Payment Date: [] Payment Amount: []

Payment Type: [] Check/CC/MO #: []

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

B Birth Certificate COUNTY

B Plain Paper Copy

Birth: 3034689

Child Mother Mother pg 3 Spouse Fees & Compliance

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	6. DATE FILED BY REGISTRAR 02/08/2021
7. FACILITY OF BIRTH (OR STREET ADDRESS) MercyOne Des Moines Medical Center	5. COUNTY OF BIRTH Polk	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	6. DATE FILED BY REGISTRAR 02/08/2021
7. FACILITY OF BIRTH (OR STREET ADDRESS) MercyOne Des Moines Medical Center	5. COUNTY OF BIRTH Polk	8. CITY, TOWN, OR LOCATION OF BIRTH Des Moines

MOTHER

16. CURRENT LOCAL FIRST NAME AND MIDDLE NAME Shear	18. CURRENT LOCAL LAST NAME, SUFFIX Nichols
17. FIRST NAME AND MIDDLE NAME PRIOR TO ANY MARRIAGE Shear	19. LAST NAME, SUFFIX PRIOR TO ANY MARRIAGE Moore
20. CITY OF RESIDENCE Iowa	21. COUNTY OF RESIDENCE Cedar
22. ZIP CODE Iowa	23. DATE OF BIRTH (OR AGE) 05/04/1990

FATHER

16. CURRENT LOCAL FIRST NAME AND MIDDLE NAME Bronze	18. CURRENT LOCAL LAST NAME, SUFFIX Nichols
17. FIRST NAME AND MIDDLE NAME PRIOR TO ANY MARRIAGE Bronze	19. LAST NAME, SUFFIX PRIOR TO ANY MARRIAGE Nichols
20. CITY OF RESIDENCE Iowa	21. COUNTY OF RESIDENCE Iowa
22. ZIP CODE Iowa	23. DATE OF BIRTH (OR AGE) 05/04/1994

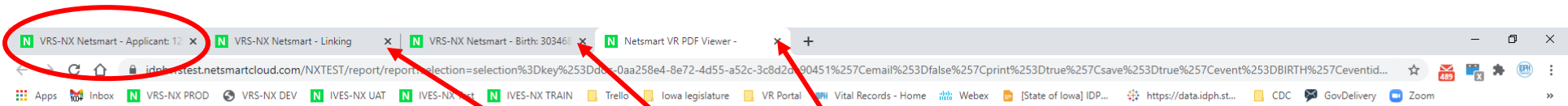
NO NOTATIONS

DATE ISSUED: 02/08/2021 COUNTY REGISTRAR: [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
 Update Request

Service Information

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

Update Service
 Update Service

Requests/Services/Inventory Information

REQUESTS

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

SERVICES

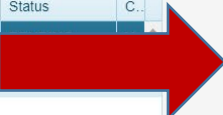
RequestID	Event Type	Service Type	Fee Type	Copies	\$Total	Status	C...
1357324	Birth	Certified Copy	Standard	1	\$ 15.00		

Search To Print Event Record
 Search To Print Event Record

Inventory Begin #

Inventory End #

Use Inventory
 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 **Use Inventory** button. *The service grid will be marked as COMPLETED.*
 - Change the Request Status Type to COMPLETED
 - Click the **Update Request** 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

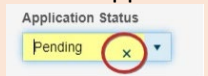
Applicant Information

*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

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

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.

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.

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			

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 Previous Event Save

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
Request Status Type: **CANCELLED**

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

Update Request

Update Request

Service Information

Clear Service Fields

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

Application Status: [Dropdown menu open showing options: Cancelled, Closed, Closed By Audit, Completed, Hold, Pending, Return]

Applicant Information

First Name: Copper

Middle Name: [Input]

State Name: Iowa

City: [Input]

Phone - Primary: [Input]

Fax - If Applicable: [Input]

Email: [Input]

Total \$ Charged: \$20.00

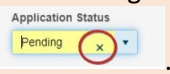
Total \$ Paid: \$20.00

Amount Due: \$0.00

Payment Information

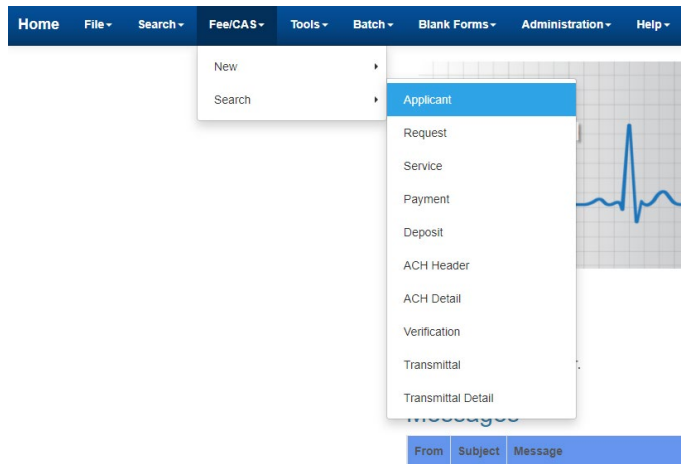
Payment Date	Payment Type	Check Num	Amount	Applicant ID	Payment ID	Modify Date
11/20/2020	Cash		\$ 20.00	12197	9580	11/20/2020

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.

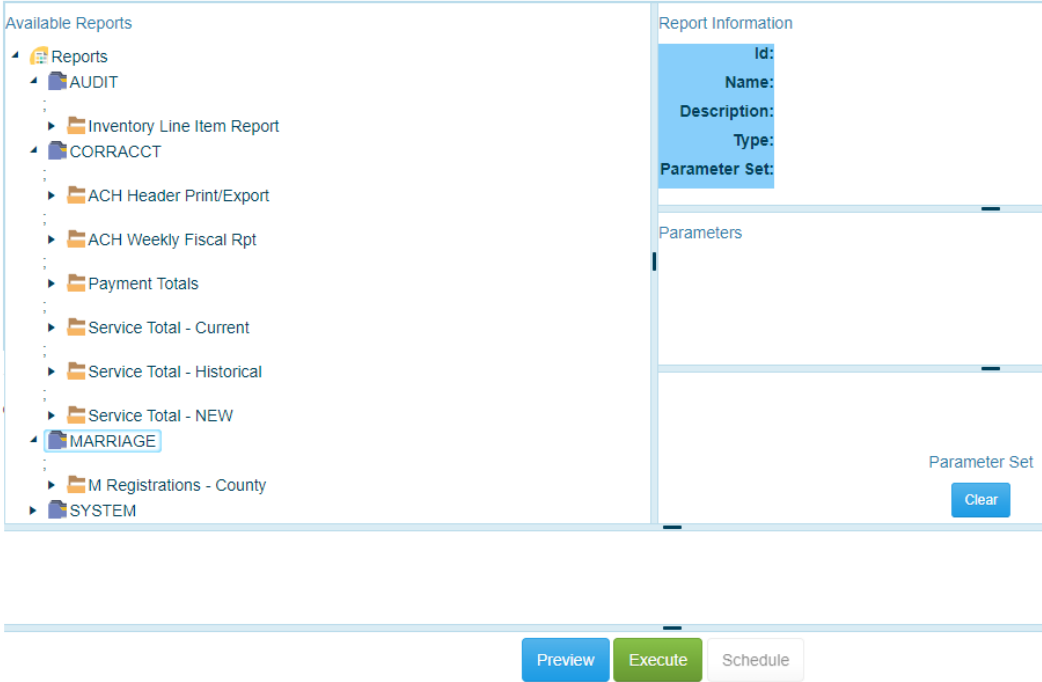
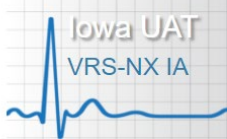
This will add the exchange service to the Service section. **Make sure that the correct Service line is highlighted in the Service Information grid.**

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

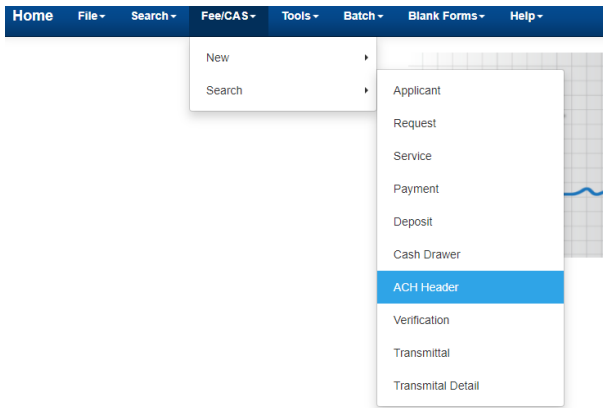
It is recommended to run the following reports on a daily basis in order to detect issues in a timely manner.

- **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)

 A screenshot of the search criteria form. It has two tabs: 'Search Criteria' and 'Search Result'. The form contains several input fields: 'Begin Date of Service', 'End Date of Service', 'Deposit Date', 'Stripoff Date', 'OWED_TO_STATE', 'User Location' (a dropdown menu with 'Polk' selected), 'User Location Code', and 'Is Active?' (with a 'T' entered). There are 'Clear' and 'Search' buttons at the top right.

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)

 A screenshot of the search results table. It has tabs for 'Search Criteria' and 'Search Result'. The table has columns: 'Begin Date of Service', 'End Date of Service', 'OWED_TO_STATE', 'Deposit Date', 'Stripoff Date', 'User Location', and 'User Location Code'. The table contains 14 rows of data. At the top right, there are buttons for 'Flat View', 'Export', 'Images: 0', 'Notes: 0', and 'Display'.

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 Save

ACH County: Flags:

County Information

User Location Description:

User Location Code:

Post:

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

Owed to State: Adjustments are included:

Recalculate Total:

Detail Information (services)

Search:

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
Dean	Warner	11052	15419

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

Record is Adjustment?: Adjustment Notes:

Event Type	Service Type	Fee Type	Copies	Service Total
MARRIAGE	Application	Standard	1	35.00

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

ACH County: **Flags**

County Information

User Location Code: CNTY-077

Begin Date of Service: 01/01/2018
End Date of Service: 01/31/2018
Deposit Date:
Stripoff Date:
Owed To State:
Adjustments are Included:
Recalculate Total:
Print Report:
Print Report

Detail Information (services)

No items to display

Printing the Report

Open the ACH Header Report, click on the **Print Report** 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

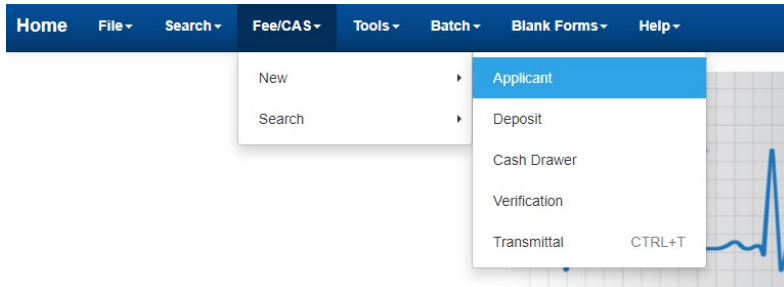
Page: 279.40 X 215.90

Close

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 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

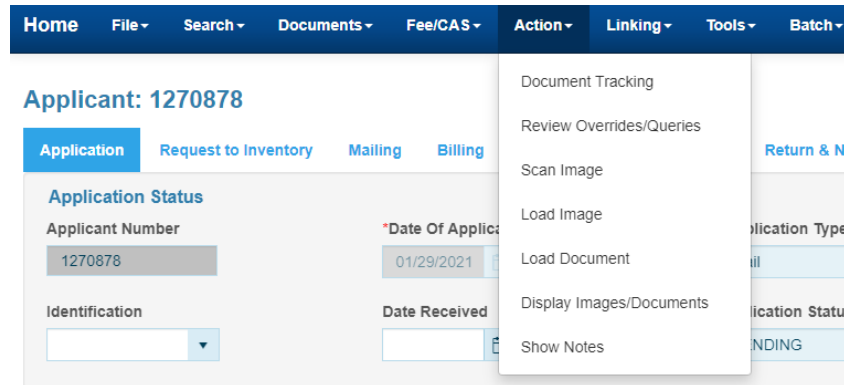
Reassign Request to this Location Location Code Assigned

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

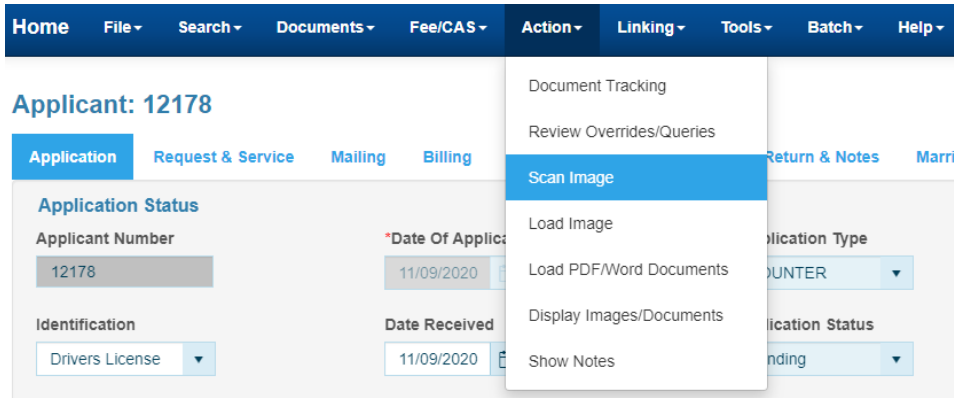


Image/Documents can be attached to any CAS application, marriage record, or correction request.

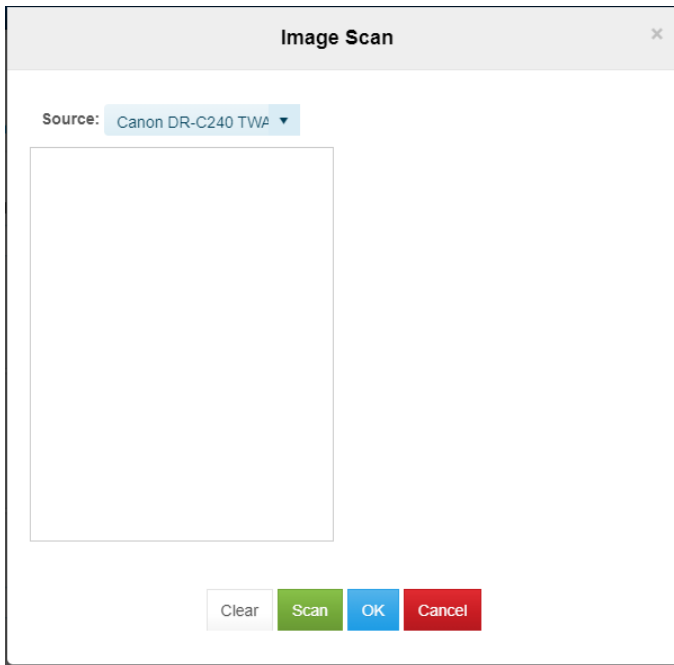
- Select Action from the menu
- **Select one of the 3 options:**
 1. Scan Image (if you have a scanner attached to your computer and it allows you to load the image to the application -> use this option)
 2. Load Image (if you have a scanner that routes it to a file document requiring you to save it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

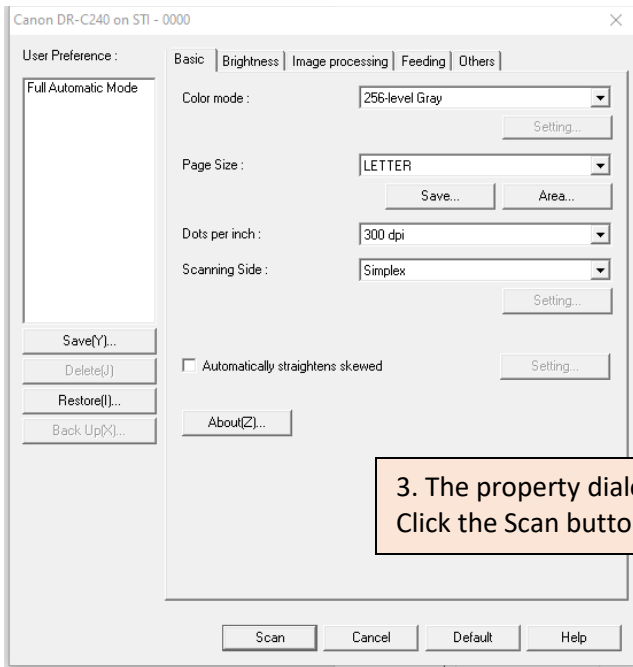
OPTION 1: Scan Image (if you have a scanner attached to your computer and it allows you to load the image to the application)



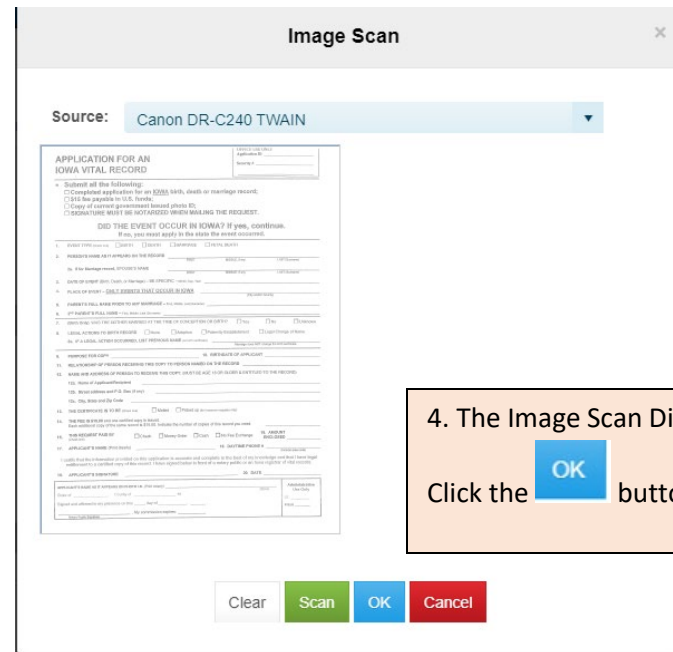
1. On the record or application, click **Action >Scan Image**



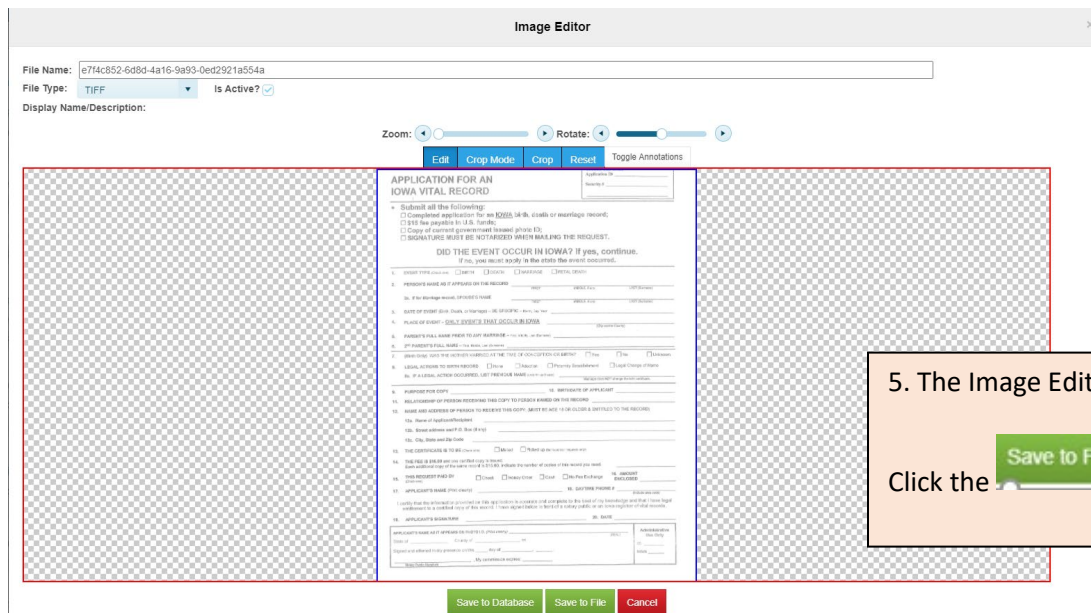
2. Image Scan dialog will appear. Make sure your scanner name is in the source field.
Click the **Scan** button.



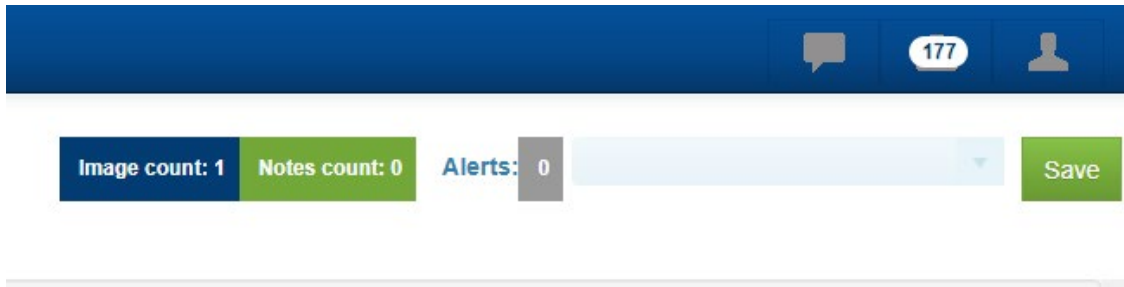
3. The property dialog will appear. Click the Scan button.



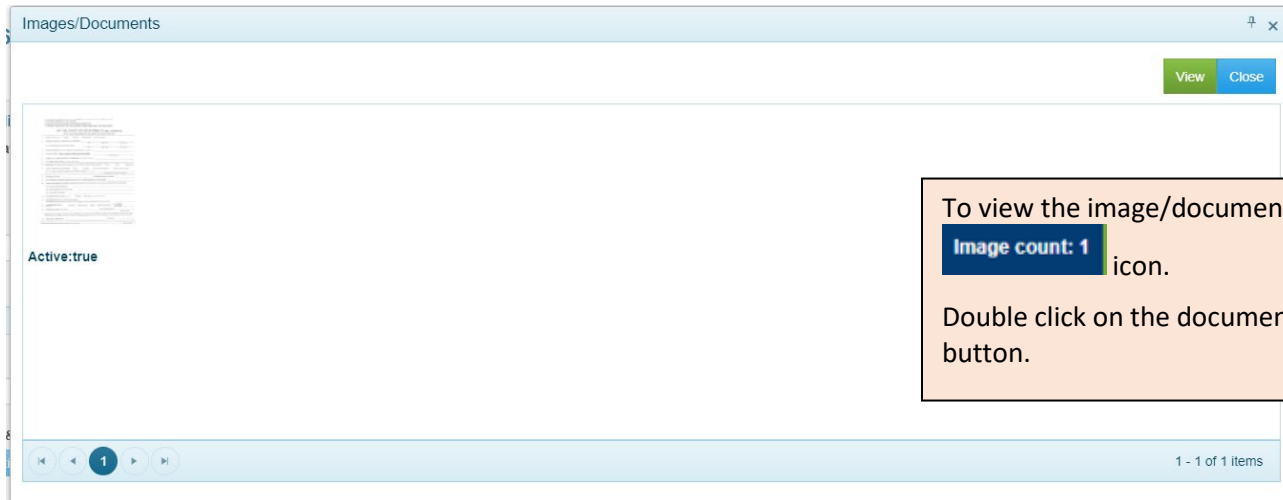
4. The Image Scan Dialog will appear. Click the **OK** button.



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

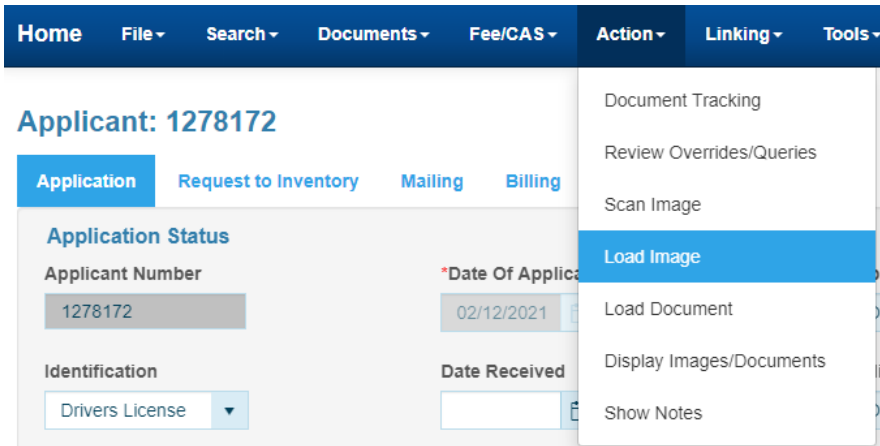


6. The **Image count: 1** icon located on the top corner of the page will reflect the attached image/document.



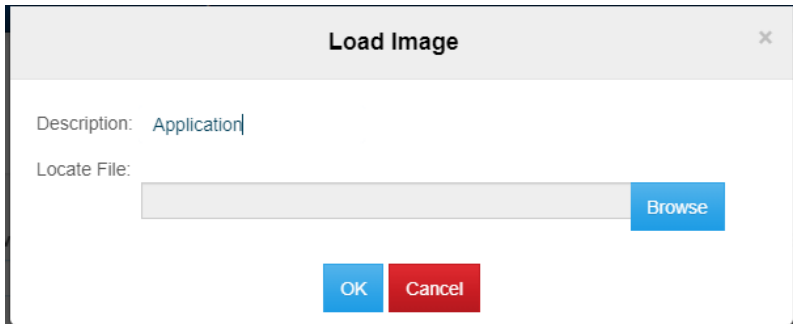
To view the image/document, click on the **Image count: 1** icon.
Double click on the document or click the **View** button.

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



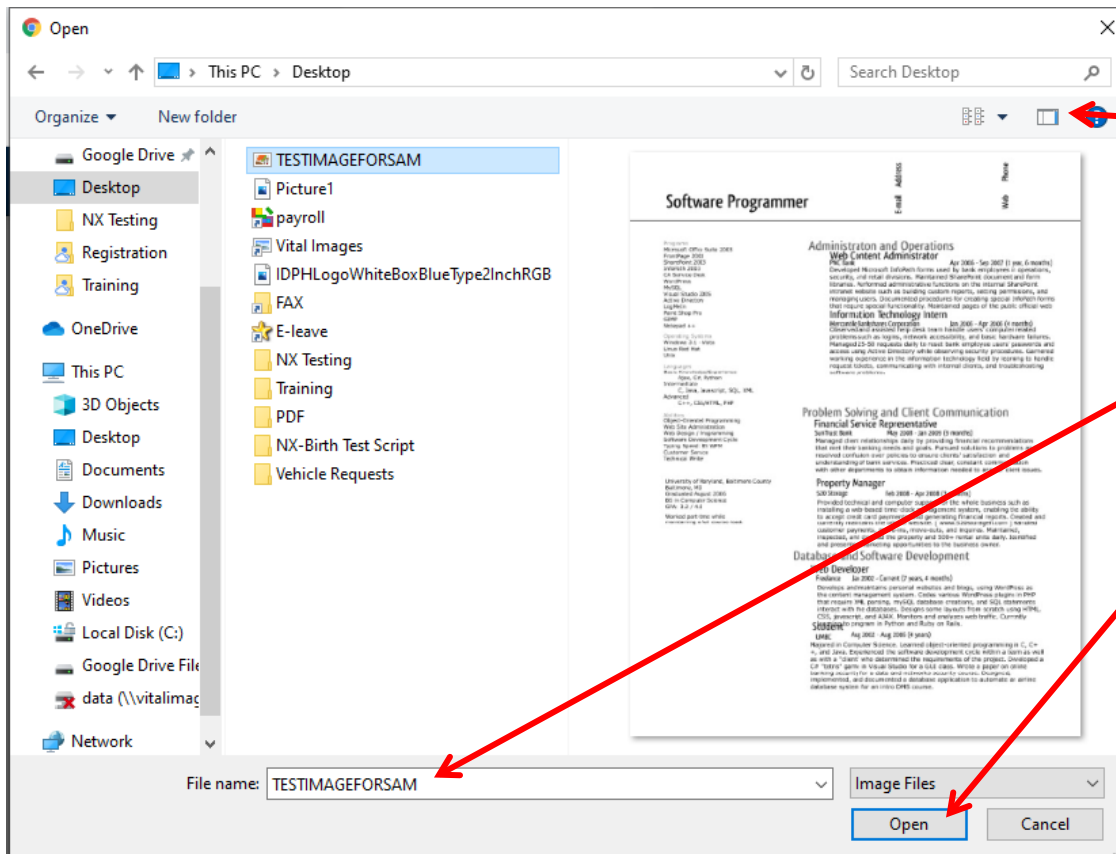
Scan the application and supporting documentations (if applicable) through your scanner which will require you to save the Image as a **jpeg or tiff** on your computer.


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



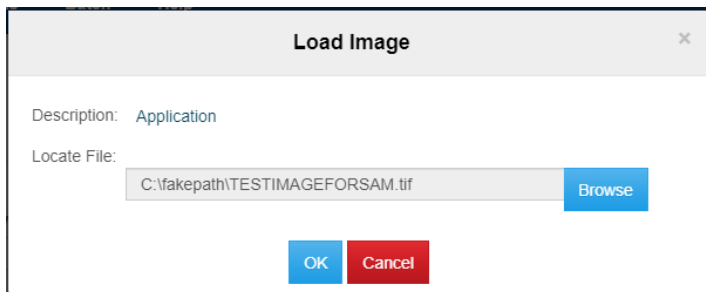
2. The Load Image screen will appear – Enter a description for the document.


Click on the **Browse** button.

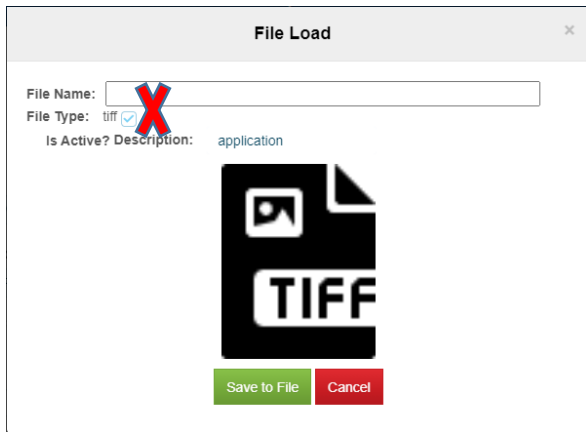


3. Open screen appears, click on the  (3 panels) icon on the upper right hand corner. **This will allow you to preview the image/document.**

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.

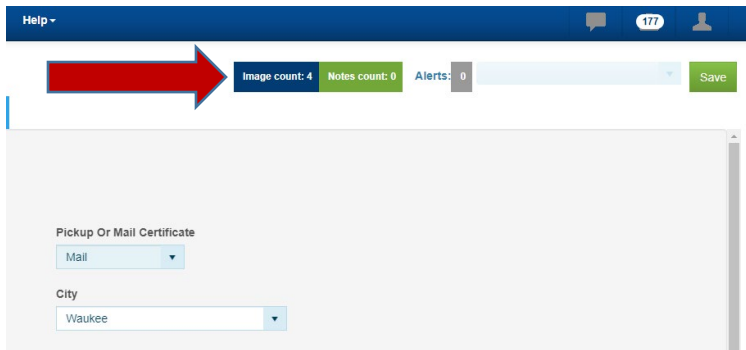


6. The file name appears in the Load Image screen. Click the  button.

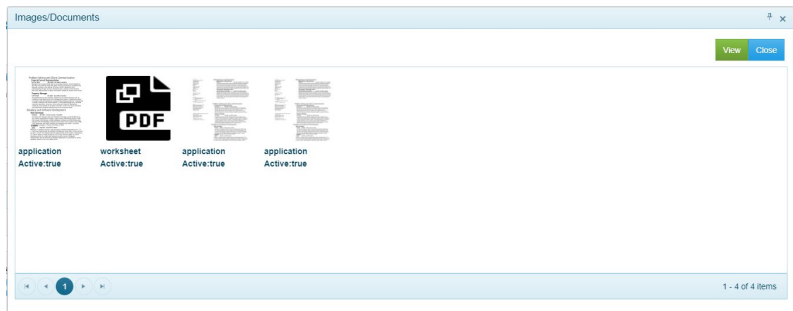


7. The File Load screen will appear. **DO NOT ENTER A FILE NAME**

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)

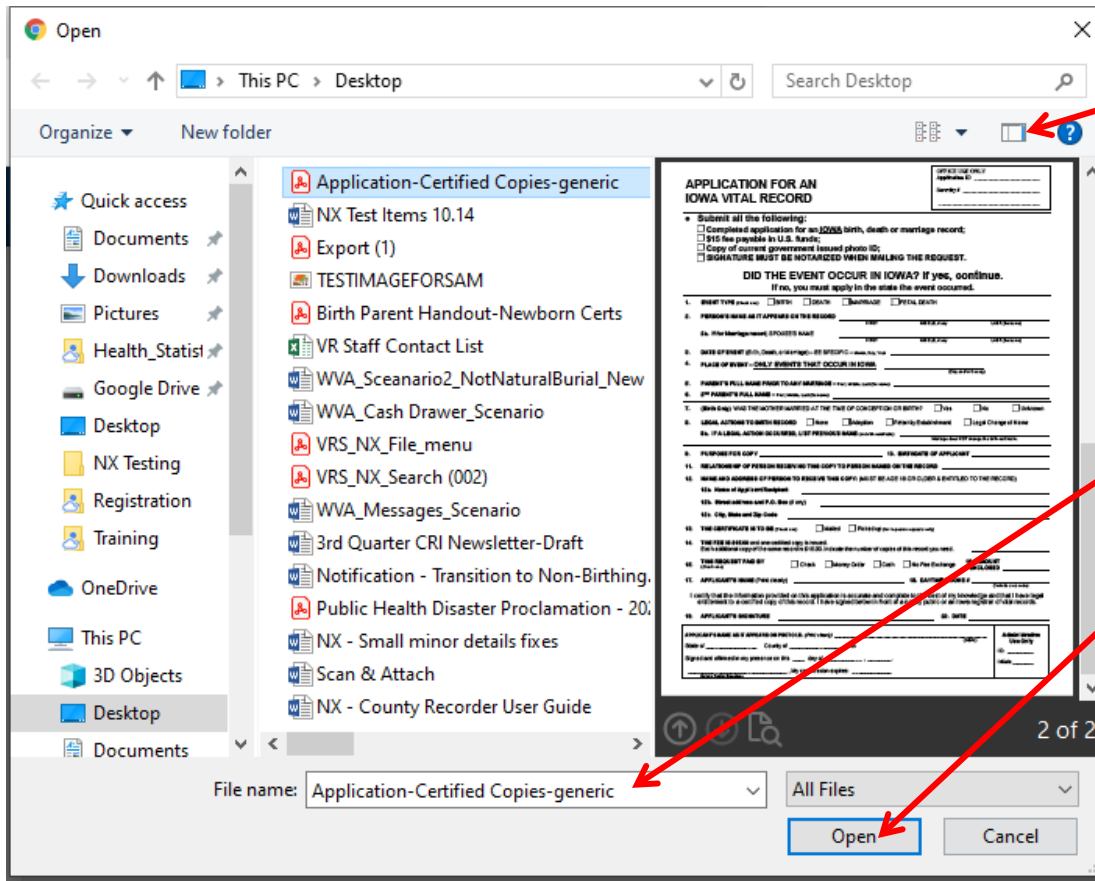
The screenshot shows a web application interface for an applicant record. At the top, there is a navigation bar with 'Home', 'File', 'Search', 'Documents', 'Fee/CAS', 'Action', 'Linking', and 'Tools'. Below this, the applicant's name 'Applicant: 1278172' is displayed. There are tabs for 'Application', 'Request to Inventory', 'Mailing', and 'Billing'. The 'Application Status' section includes fields for 'Applicant Number' (1278172), '*Date Of Application' (02/12/2021), 'Identification' (Drivers License), and 'Date Received'. The 'Action' dropdown menu is open, listing options: Document Tracking, Review Overrides/Queries, Scan Image, Load Image, Load Document (highlighted), Display Images/Documents, and Show Notes.


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 screenshot shows a 'Load File' dialog box. It has a title bar with 'Load File' and a close button. Below the title bar, there is a text field labeled 'Display Name/Description' with the value 'Application'. Below that is a 'Locate File:' label followed by a text input field and a blue 'Browse' button. At the bottom of the dialog, there are two buttons: a blue 'OK' button and a red 'Cancel' button.

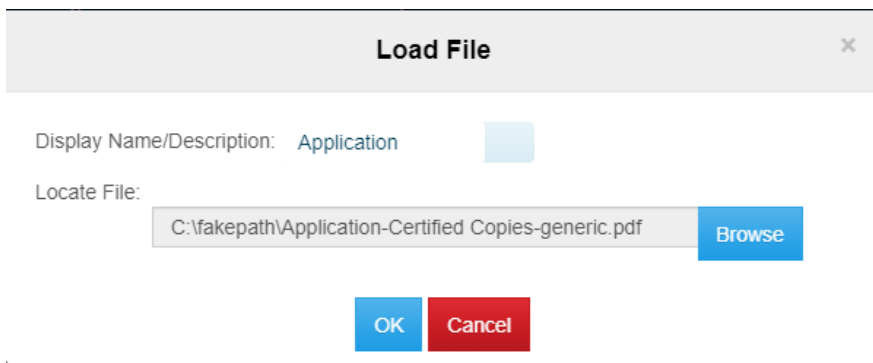
2. The Load File screen will appear – Enter a description for the document.
Click on the **Browse** button.




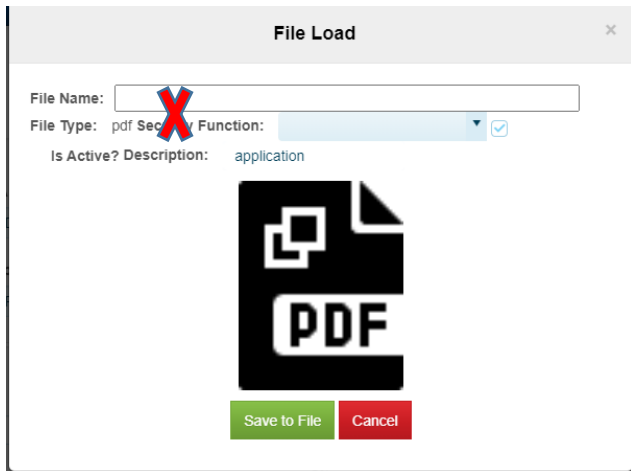
3. Open screen appears, click on the  (3 panels) icon on the upper right hand corner. **This will allow you to preview the image/document.**

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.

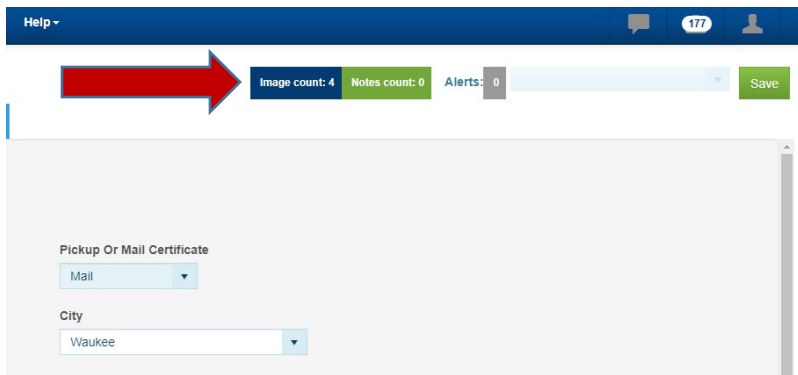


6. The file name appears in the Load File screen. Click the  button.

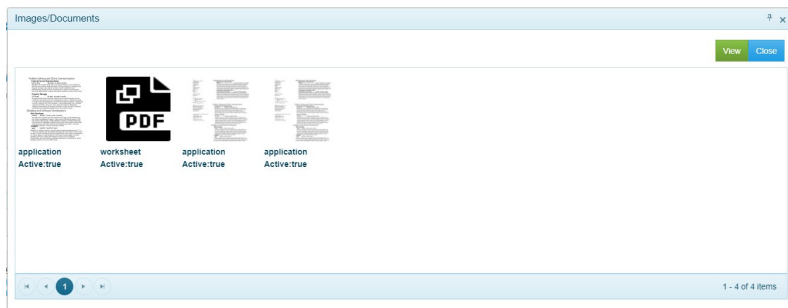


7. The File Load screen will appear. **DO NOT ENTER A FILE NAME**

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 for a "Software Programmer". The interface includes a top toolbar with buttons for "Edit", "Crop Mode", "Crop", "Reset", "Toggle Annotations", and "Edit Annotations". Below the toolbar are two horizontal sliders for "Zoom" and "Rotate". At the bottom of the workspace are "OK" and "Cancel" buttons. Six callout boxes with arrows point to these features:

- 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.

Crop & Rotate an Image



1. Click **Crop Mode** button.

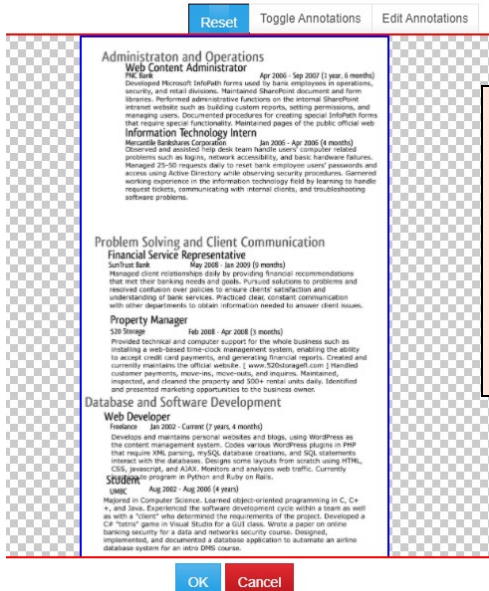


2. Move and drag the crop screen sides and corners until it frames the image.

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.

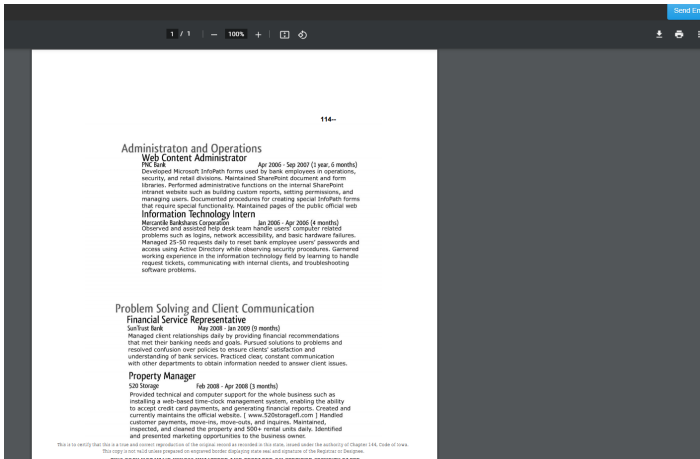
Image Editor




5. Preview of the cropped image.

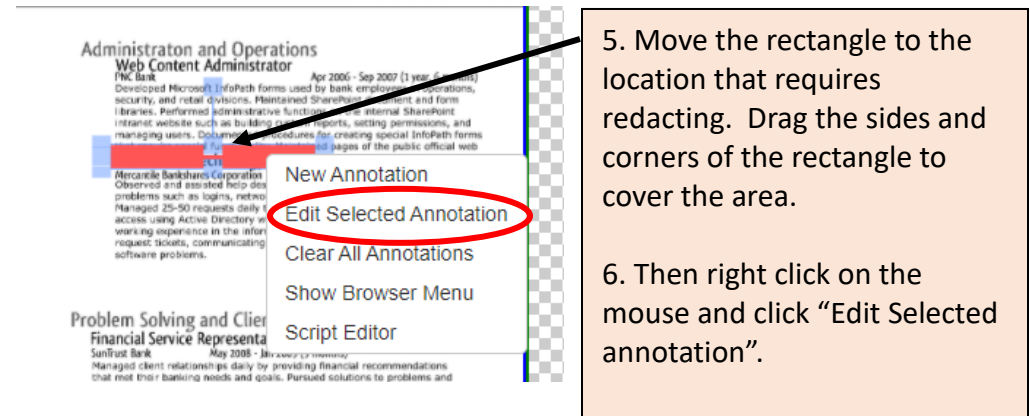
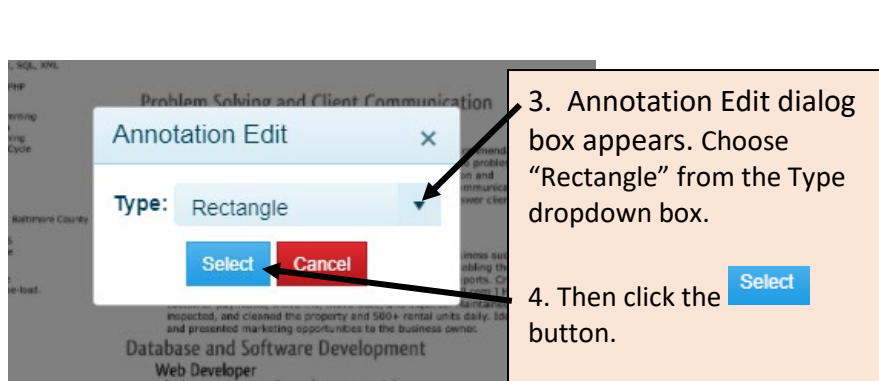
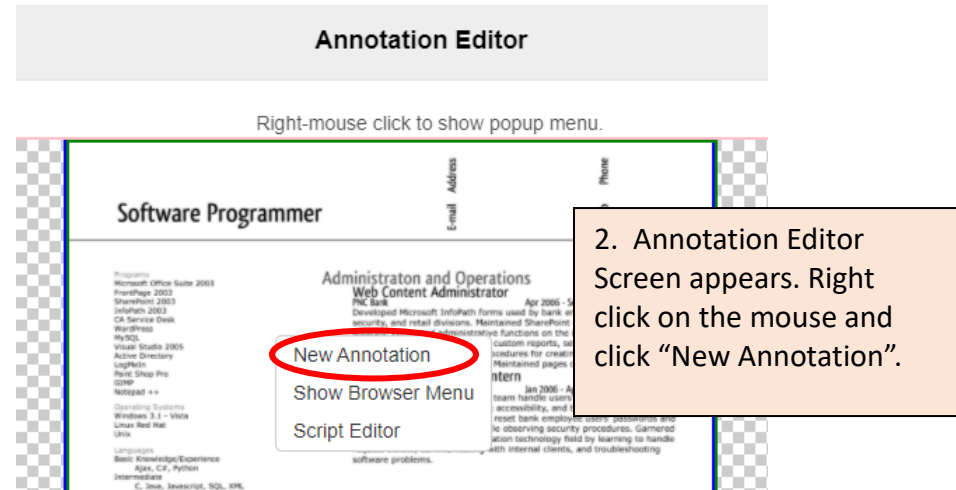
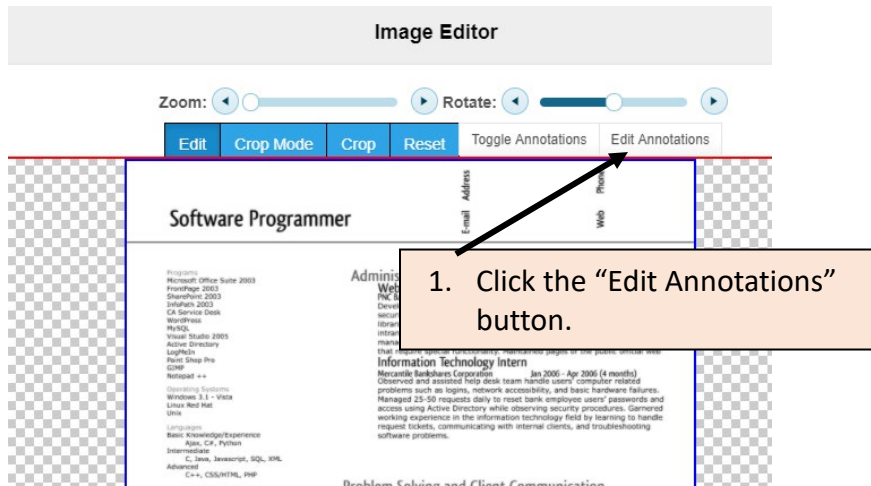
Click the  button.

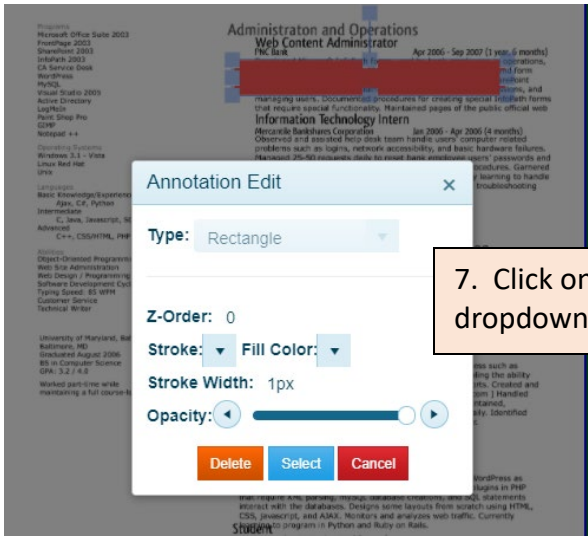
Users can click on the  button to undo any changes. Do not click the cancel button.



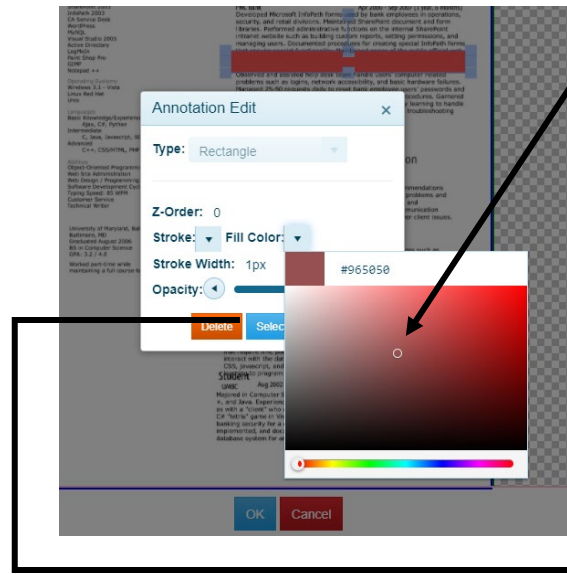
6. Final image. Click the  button.

Redact an Image





7. Click on the "Fill Color" dropdown.

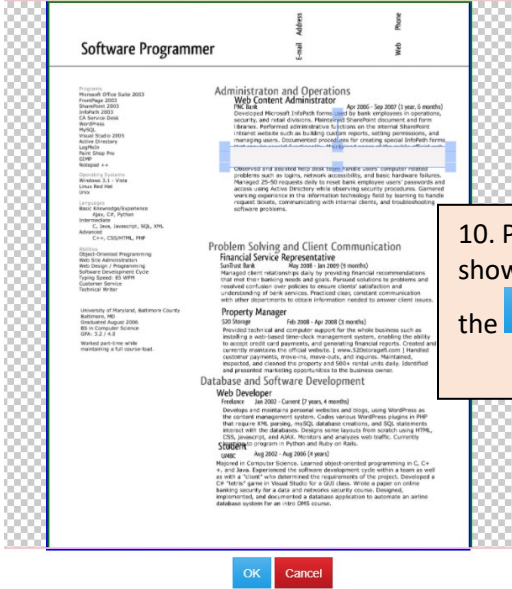


8. The color palate appears. Click on the color palate which will give you a tiny small circle. Click on the circle and drag it to desire color. Note: color white is upper left hand corner, #ffffff and the color black is lower bottom left hand corner, #000000

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

Annotation Editor

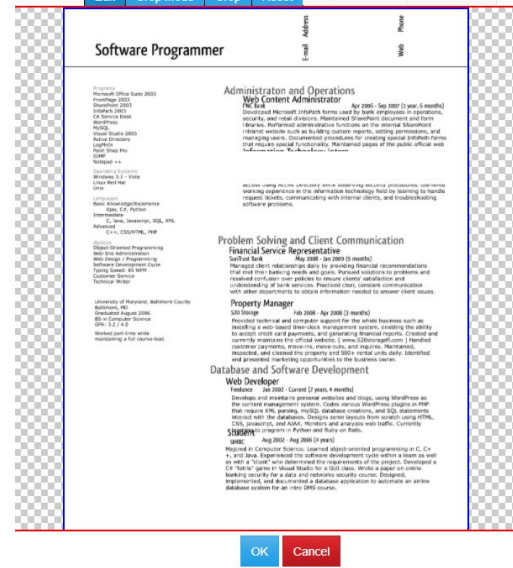
Right-mouse click to show popup menu.



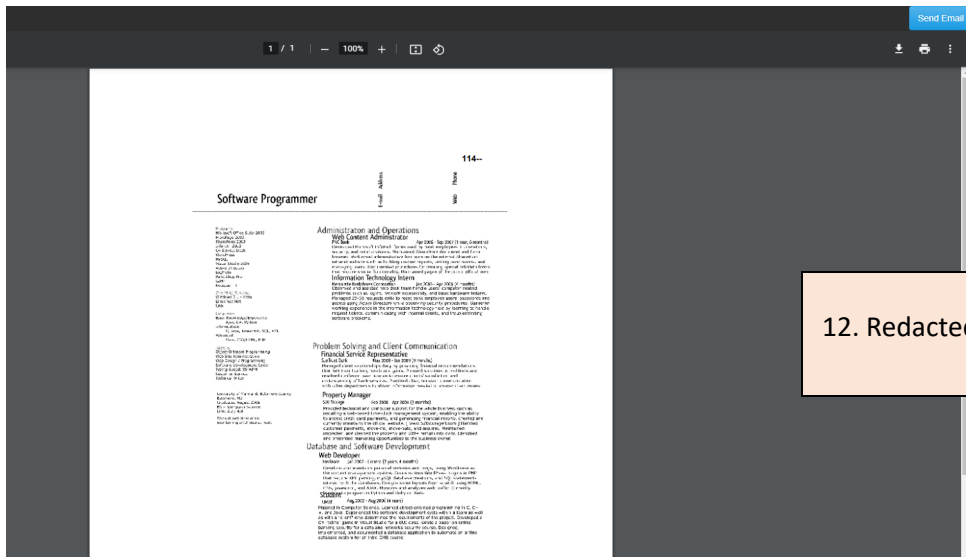
10. Preview of the image showing the redaction, click the **OK** button.


Image Editor

Zoom: [slider] Rotate: [slider]
 Edit Crop Mode Crop Reset Toggle Annotations Edit Annotations

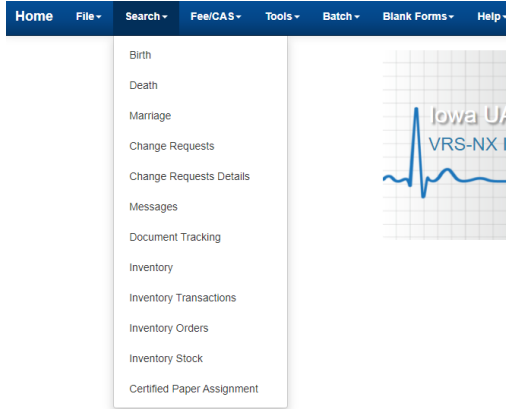


11. Final view of the redacted image, click the **OK** button.



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.

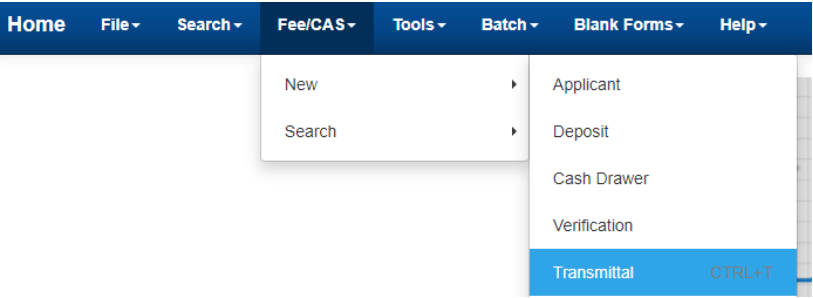
3. The record will display.

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

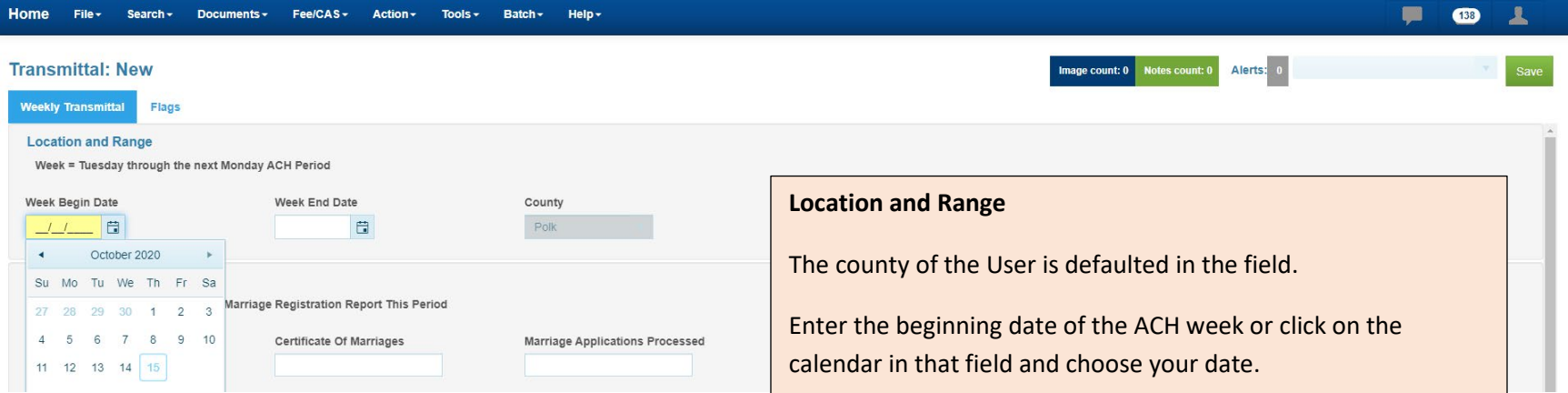
This does not require a CAS service.

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
Clear Control #s

Transmittal Type: [] Paper Type: [] Begin: [] End: [] Save Control #s
Save Control #s

Transmittal Type dropdown: Damaged, Exchange, Unaccounted For

Paper Type dropdown: I, 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 **Clear Control #s** 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 **Save Control #s** 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

Transmittal Type: Damaged
Paper Type: IVES
Begin: 8888888
End: 8888888
Save Control #s: Save Control #s

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

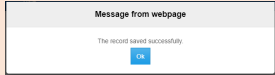
Completion

Record Completed:

Completed Date:

Completed By:

- Completion**
- Enter a Y in the RECORD Completed field and click the **Save** button. The completed date and the name of the person will auto-fill.
 - A pop up message stating, “The record save successfully,” click the **Ok** 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

Transmittal: 34

Weekly Transmittal | Flags

Location and Range

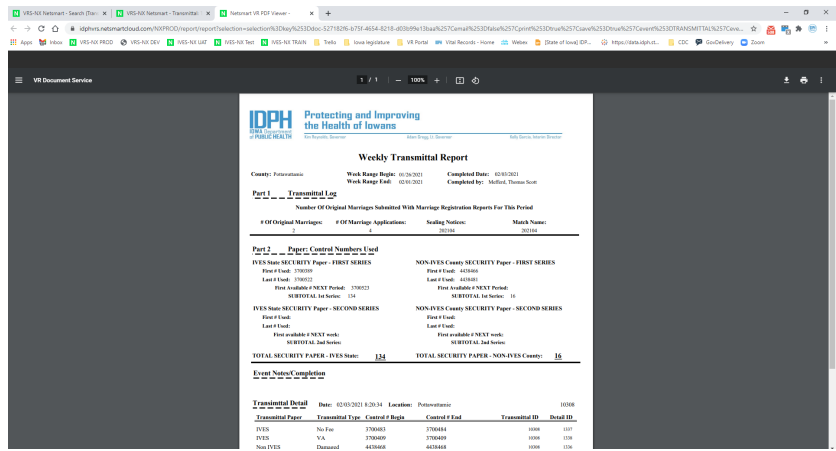
Week = Tuesday through the next Monday ACH Period

Week Begin Date: 10/01/2020

Week End Date: 10/07/2020

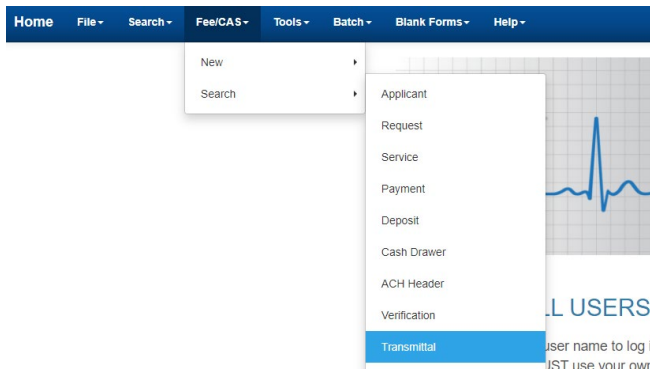
County: Polk

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 **Print** 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:

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 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

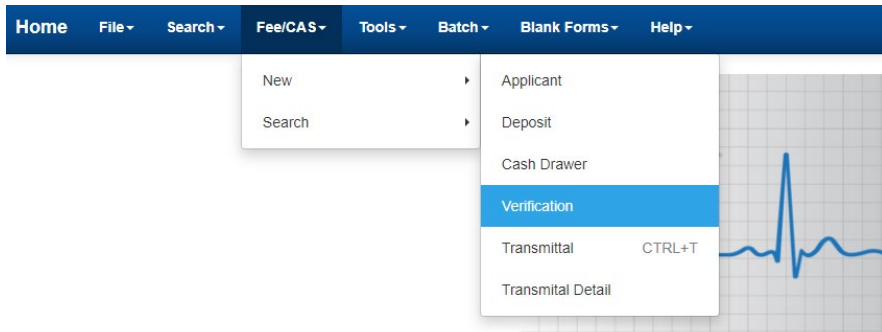
The search results will appear in the grid.

Double click to open transmittal or select the transmittal and click the 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

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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

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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

<input type="checkbox"/> Registrant Name	<input type="checkbox"/> Parent's Location of Birth
<input checked="" type="checkbox"/> Date of Event	<input type="checkbox"/> Sex of Registrant
<input type="checkbox"/> Mother's Name	<input type="checkbox"/> Time of Event
<input type="checkbox"/> Father's Name	<input type="checkbox"/> Date Filed
<input type="checkbox"/> Mother's Date of Birth	
<input type="checkbox"/> Father's Date of Birth	<input type="checkbox"/> Other

Verification Request Completion

County Comments
asdf

Verification Request Completed? Y	Verification Request Date 07/05/2018	Verification Request Completed By thomas - county polk
--------------------------------------	---	---

Change Verification Status

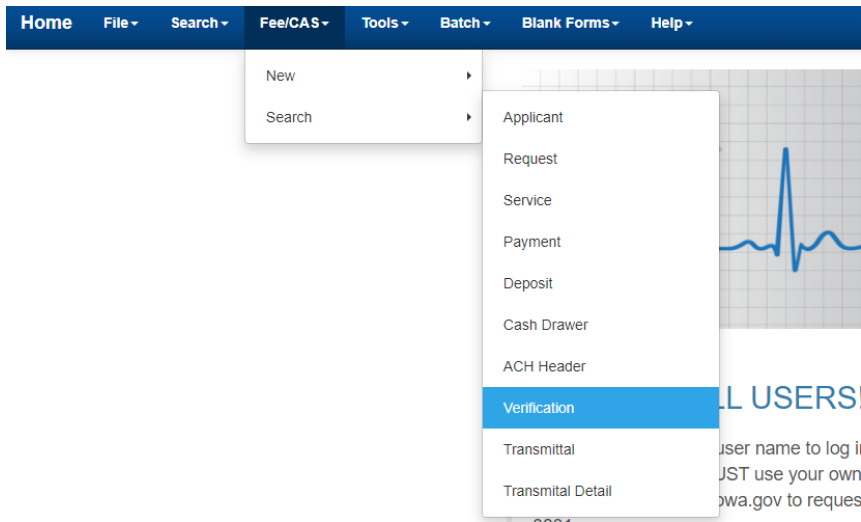
Close Verification <input type="button" value="Close Verification"/>	Cancel Verification <input type="button" value="Cancel Verification"/>
---	---

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

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

Close browser.

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 interface with a dark blue navigation bar at the top containing the following menu items: Home, File, Search, Fee/CAS, Tools, Batch, Blank Forms, and Help. The 'File' menu is expanded, showing a white sub-menu with 'New', 'Relogin', and 'Log Out'. The 'New' option is further expanded into a second white sub-menu, where 'Marriage' is highlighted in blue and labeled with the keyboard shortcut 'CTRL+M'. Other items in this sub-menu include 'Change Requests', 'Change Requests Details', 'Messages', 'Inventory', 'Inventory Orders', and 'Certified Paper Assignment'.

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

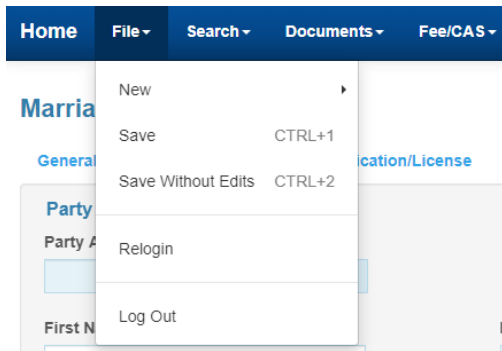
- ✓ First Name
- ✓ Middle Name (if applicable)
- ✓ **New** Last Name
- ✓ Suffix (if applicable)

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: United States (dropdown) State: Iowa (dropdown) City - Optional: (empty dropdown) County - Optional: (empty dropdown)

Birthplace

Country: United States (dropdown) State: (empty dropdown)

Date Of Birth: (calendar icon) Age: (grayed out) Consent: (grayed out) Gender - Optional: (dropdown)

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

idphvrstest.netsmartcloud.com says

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

- ✓ 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.

Completed view after 9 numbers have been entered.

idphvrstest.netsmartcloud.com says

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

idphvrstest.netsmartcloud.com says

Is this the correct SSN for Party A? 987-98-7987

OK Cancel

- ✓ 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.

Message from webpage

Party A SSN has been updated to the following 987-98-7987

Ok

- ✓ 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.

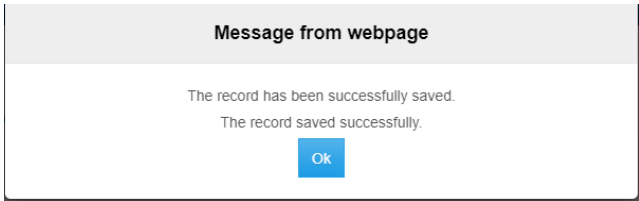
License Complete

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

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

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 Mister

Last Name Potato Head

Pickup Or Mail Certificate Mail

#1: Applicant and Mailing

Country United States

State Iowa

City Waukee

Address 20 Spud Ave

Zipcode 50263

Create Application & Request Create Application & Request

Total Amount Owed \$0.00

#2: Click Create Application & Request

Remove Waiver Remove Waiver

Payment

Payment Type Cash

Check/MO Number

Amount \$35.00

#3: Add payment type and amount

Add Payment Add Payment

Print Request Receipt Print Request Receipt

#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

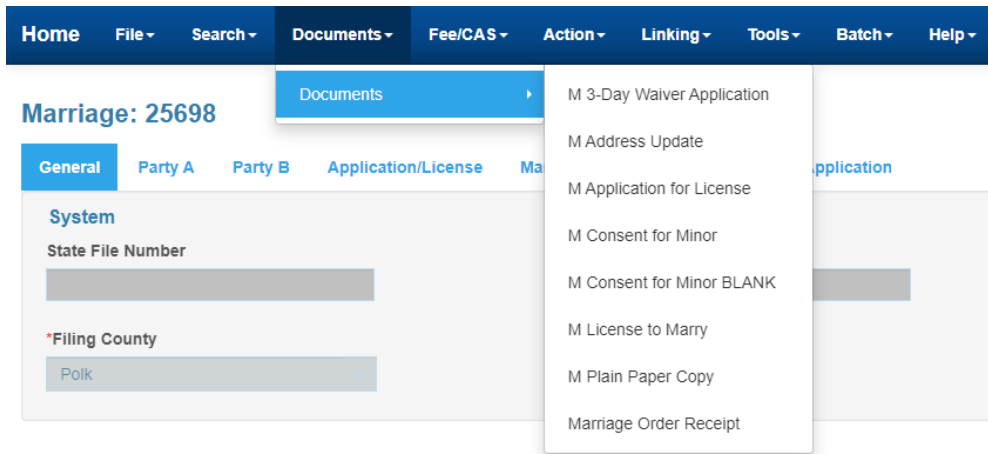
ApplicantID 12185

RequestID 13174

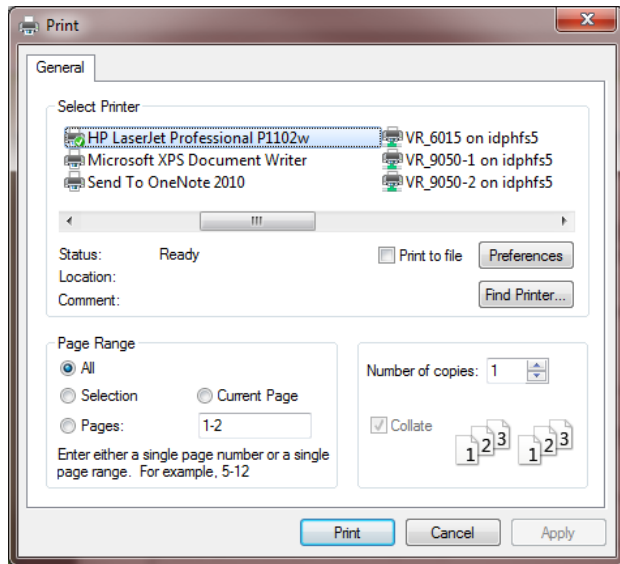
PaymentID 9661

CAS Created By Nichols, Sammi

Printing Marriage Documents

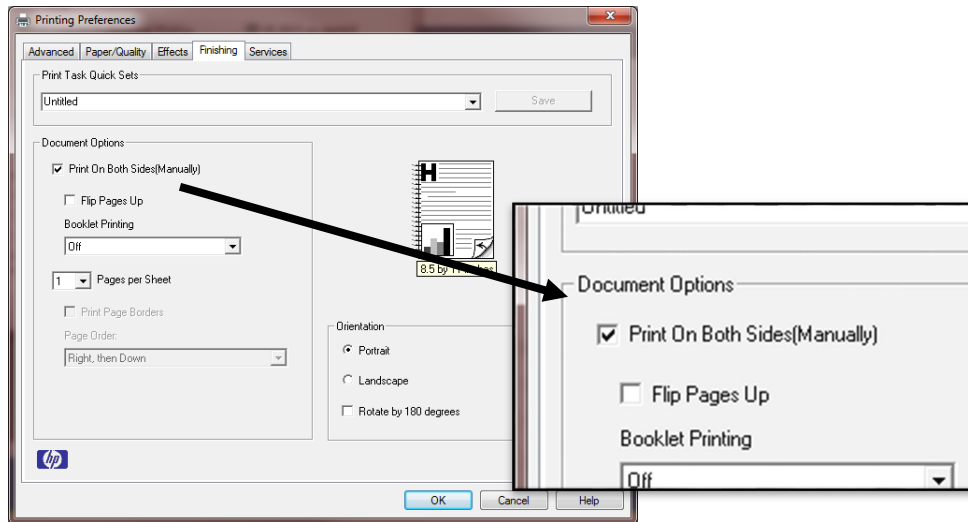


After the CAS Application has been created and the payment entered, documents will be available to print from the Documents menu.



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

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

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.

Marriage: 25697

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

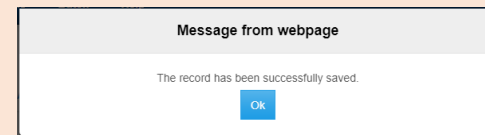
General Party A Party B **Application/License** Marriage Return Flags CAS Application

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.



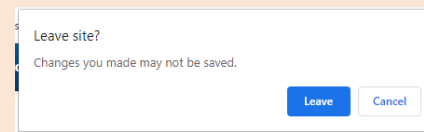
Marriage: 25697

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

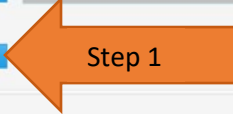
Marriage: 25699

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

Step 2

Message from webpage

The Waiver Service was removed from order.

OK

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.

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



Step 4



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:

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

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

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

Change the payment to reflect the amount.

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

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

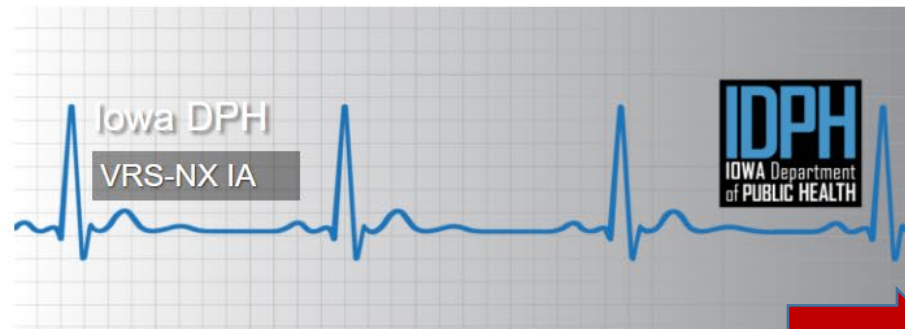
Update Payment Update Payment

Step 8

Step 9

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

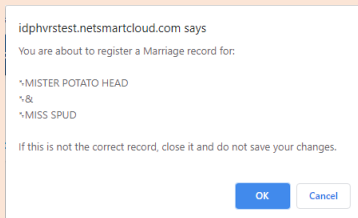
From	Subject	Message	Received	Event	Local File Number
------	---------	---------	----------	-------	-------------------

No messages to show.

Marriage Return Tab

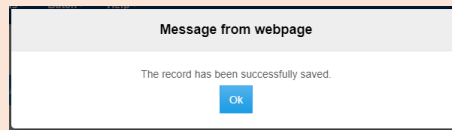
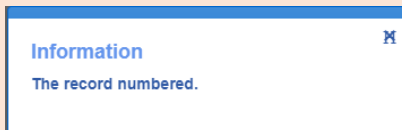
Marriage Return:

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

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

184

Marriage: 25697

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

Remove Waiver
Remove Waiver

Payment

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

Add Payment
Add Payment
Print Request Receipt
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
Add Certificate To Request
Certificate Added To Request?

CAS IDs

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

New Address?

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

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.

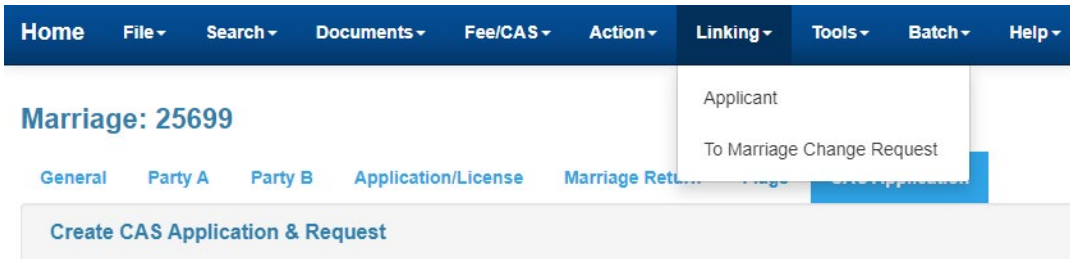
- ✓ You can only click this button once. If the couple wants more than one certified copy, all additional requests must be entered into CAS manually.

Pop up message confirming the certified copy service has been added. Click OK.

Message from webpage

Certified Copy Service Added to Order

OK

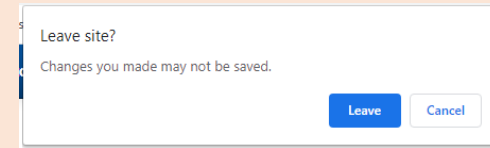


Next link to the CAS Application

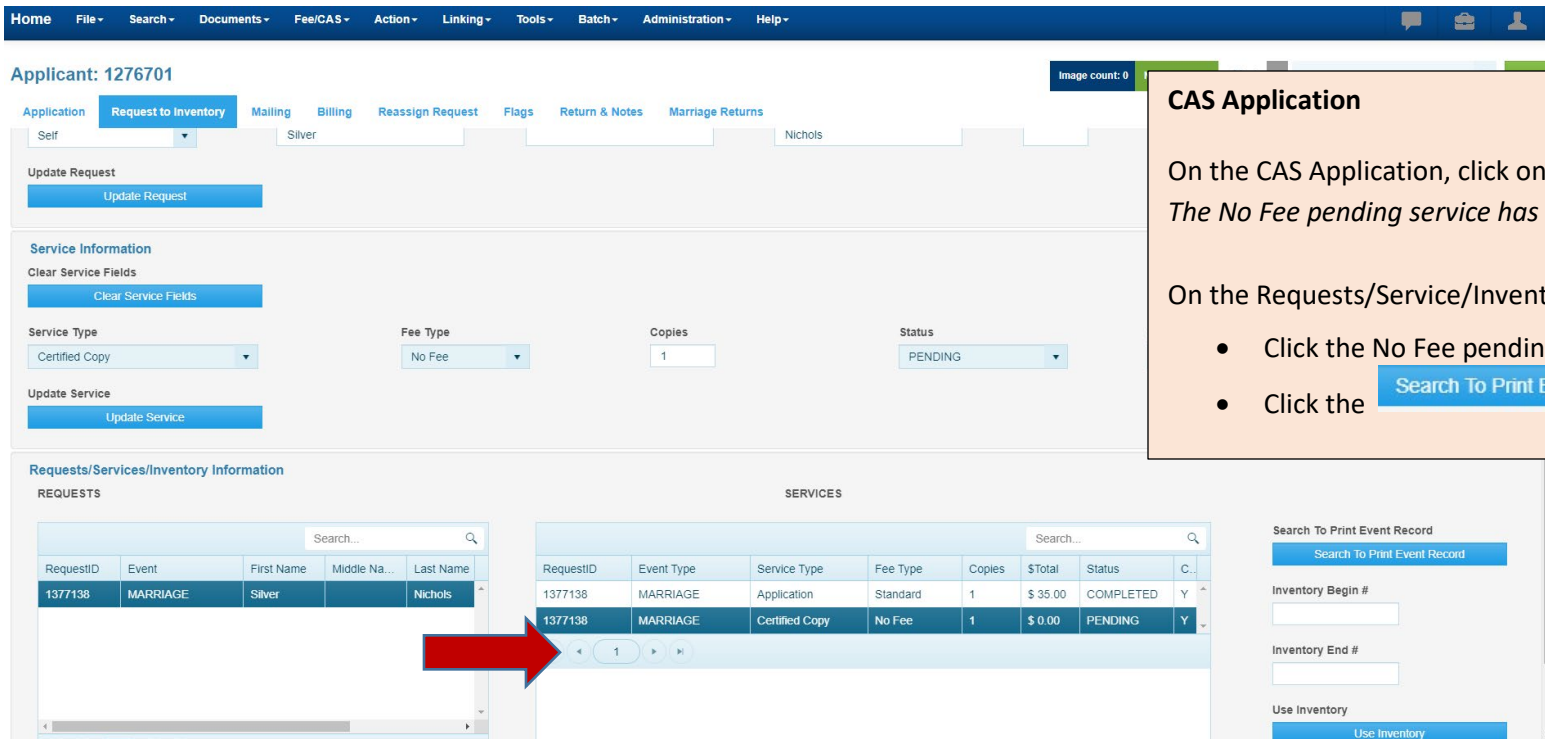
From the marriage event:

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



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
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	MIDDLE	LAST	SUFFIX (if any)	LAST NAME PRIOR TO MARRIAGE
Groom		Test		Test
PARTY NAME AFTER MARRIAGE	MIDDLE <td>LAST <td>SUFFIX (if any) <td></td> </td></td>	LAST <td>SUFFIX (if any) <td></td> </td>	SUFFIX (if any) <td></td>	
Groom		Test		
RESIDENCE - STATE	RESIDENCE - COUNTY	RESIDENCE - CITY, TOWN, OR LOCATION		
Iowa				
DATE OF BIRTH (or U.S.A. name of foreign source)	DATE OF BIRTH (or U.S.A. name of foreign source)	SEX		
Iowa	08/08/1980	M		
FOREIGN BIRTH PRIOR TO MARRIAGE	FOREIGN BIRTH PRIOR TO MARRIAGE			
PARTY NAME BEFORE MARRIAGE	MIDDLE <td>LAST <td>SUFFIX (if any) <td>LAST NAME PRIOR TO MARRIAGE</td> </td></td>	LAST <td>SUFFIX (if any) <td>LAST NAME PRIOR TO MARRIAGE</td> </td>	SUFFIX (if any) <td>LAST NAME PRIOR TO MARRIAGE</td>	LAST NAME PRIOR TO MARRIAGE
Bride		Abc		Abc
PARTY NAME AFTER MARRIAGE	MIDDLE <td>LAST <td>SUFFIX (if any) <td></td> </td></td>	LAST <td>SUFFIX (if any) <td></td> </td>	SUFFIX (if any) <td></td>	
Bride		Test		
RESIDENCE - STATE	RESIDENCE - COUNTY	RESIDENCE - CITY, TOWN, OR LOCATION		
Iowa				
DATE OF BIRTH (or U.S.A. name of foreign source)	DATE OF BIRTH (or U.S.A. name of foreign source)	SEX		
Iowa	08/08/1989	F		
FOREIGN BIRTH PRIOR TO MARRIAGE	FOREIGN BIRTH PRIOR TO MARRIAGE			
DATE OF MARRIAGE (Day Year)	THE LOCAL JURISDICTION WHERE MARRIAGE WAS REPORTED	PLACE OF MARRIAGE - COUNTY		CITY OR TOWN
02/25/2021	Polk	Polk		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
Deputy State Registrar

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%253B0...%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 (if not in U.S.A., name of foreign country)	RESIDENCE - COUNTY	RESIDENCE - CITY, TOWN, OR LOCATION			
Iowa	Dallas	Clive			
DATE OF BIRTH (of not in U.S.A., name of foreign country)	DATE OF BIRTH (Month, Day, Year)		GENDER		
Florida	05/06/1996		Male		
PARENT - NAME PRIOR TO ANY MARRIAGE		PARENT - NAME PRIOR TO ANY MARRIAGE			
...		*...*			
PARTY B - NAME BEFORE MARRIAGE		MIDDLE	LAST	SUFFIX, if any	LAST NAME PRIOR TO ANY MARRIAGE
Barbie			Girt		Girt

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.

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

Applicant: 1276129 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 SERVICES

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

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

Use Inventory Use Inventory

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

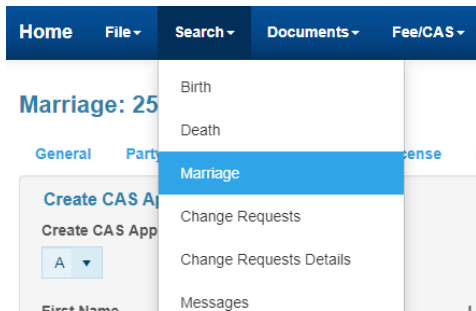
Final Steps

- ✓ 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)

Search Criteria Search Result

State File Number <input type="text"/>	Year of Marriage <input type="text"/>	Application Date <input type="text"/> <input type="button" value="Clear"/> <input type="button" value="Search"/>
County License # <input type="text"/>	Valid Date <input type="text"/>	Filing County <input type="text"/>
Party A - First Name Peter Last Name prior to any marriage <input type="text"/>	Party A - Middle Name <input type="text"/>	Record Status <input type="text"/>
Party B - Middle Name <input type="text"/>	Party A - Last Name after Marriage <input type="text"/>	Party A - Current Last Name Par <input type="text"/>
Party B - Last Name after Marriage <input type="text"/>	Party B - Current Last Name <input type="text"/>	Party B - First Name <input type="text"/>
Date Filed <input type="text"/>	Place of Marriage - County <input type="text"/>	Last Name prior to any marriage <input type="text"/>
Record Completed? <input type="text"/>	MarriageID <input type="text"/>	Date of Marriage <input type="text"/>
		License Completed? <input type="text"/>
		User Location <input type="text"/>

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

- New Marriage CTRL+M
- Save CTRL+1
- Save Without Edits CTRL+2
- Change Requests
- Inventory
- Inventory Orders
- Certified Paper Assignment

Party A

Party A - First Name: Tinker

Party A - Middle Name:

Party A - Current Last Name: Bell

Party A - Last Name Prior To Any Marriage: Bell

Party A - Suffix:

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

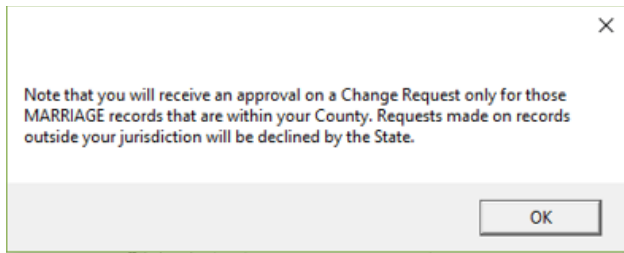
Leave site?

Changes you made may not be saved.

Leave Cancel

Message appears confirming you are leaving the current site.

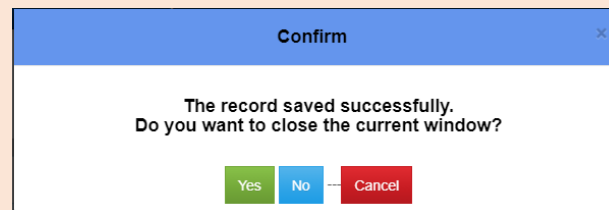
Click the **Leave** button.



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

5. On the Corrections paragraph, click the button.
6. 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

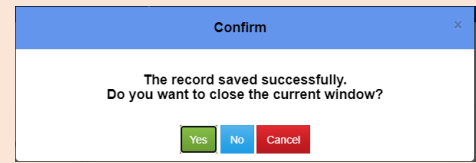
Change Request Approval Flags

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

Initial Entry Completed & Ready To Approve By State? N

Date Completed

Completed By

Optional: Reason For Change

Some Items Were Updated Previously? N

Signed? N

Signed By

Date Signed

Go To Update Event

Go To Update Event

Remove Notations To Print On Certificate N

Rejected Flag REJECTED

Reason/Notes For Rejection

Please Provide Supporting Documentation

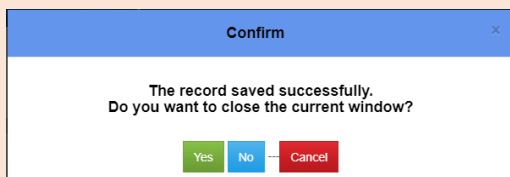
Click on the **Approval** tab. Users will notice the Y in “Initial Entry Completed & Ready to Approve by State” field has been reverted back to an N, along with the removal of the date and the person that completed the request. This allows the user to make the necessary update to the request.

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.

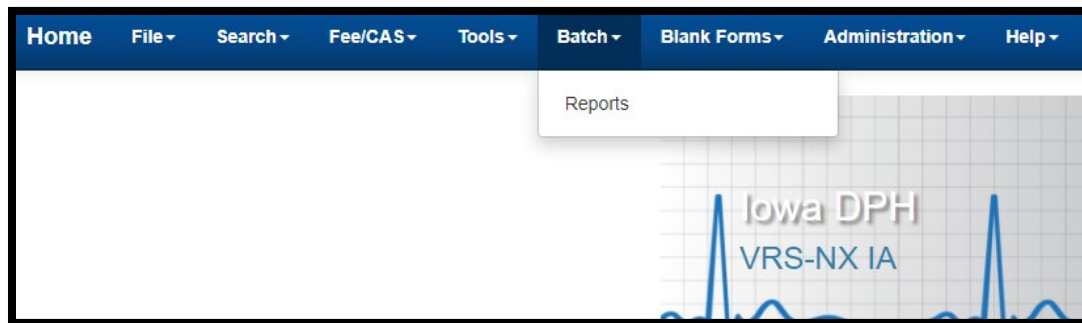


Remitting Certificate of Marriage Documents

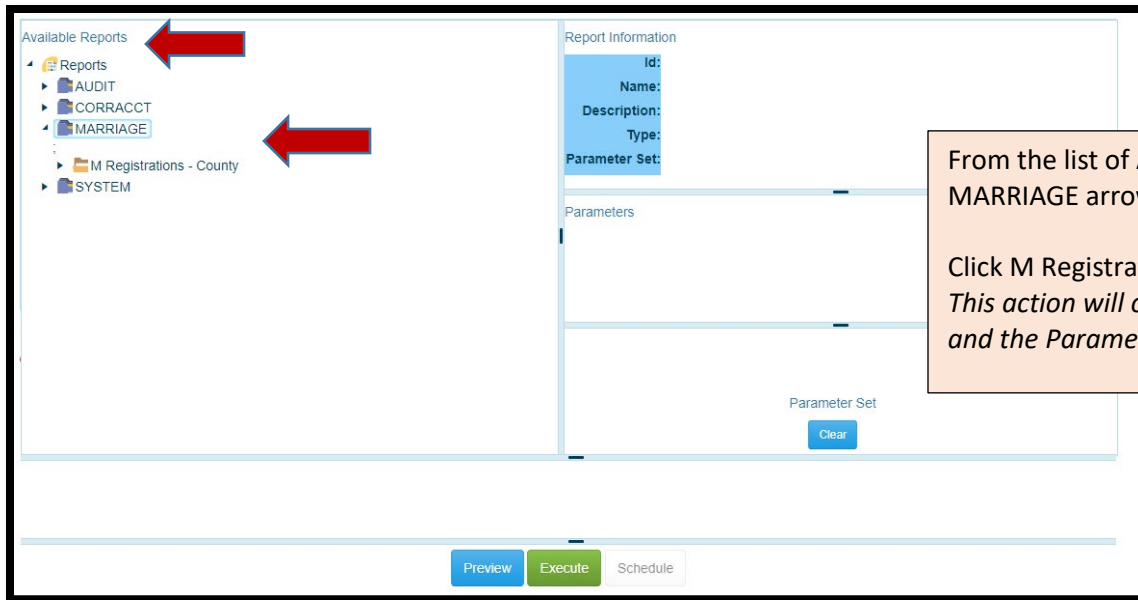
- 1) County recorders will print the Marriage Registration Report weekly in accordance with the ACH periods.
 - a) The total number of marriages filed in IVES during the ACH time period will show on the Marriage Registration Report. The total number of marriages is entered on the Weekly Transmittal Report
- 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

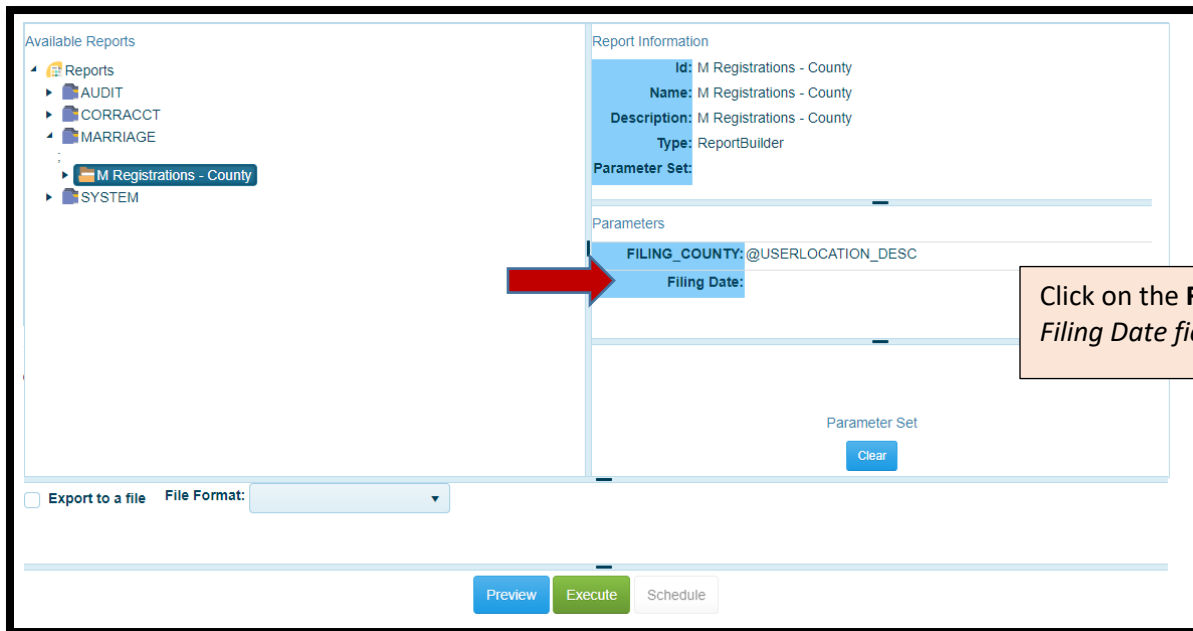


From the main menu on the Home page, click **Batch > Reports**



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.*

Available Reports

- Reports
 - AUDIT
 - CORRACCT
 - MARRIAGE
 - M Registrations - County
 - SYSTEM

Report Information

Id: M Registrations - County
Name: M Registrations - County
Description: M Registrations - County
Type: ReportBuilder

Parameter Set:

Parameters

FILING_COUNTY: @USERLOCATION_DESC
Filing Date:

Filing Date: [Date Picker]
 for a range of dates such as: 01/01/2018,06/30/2018

Parameter Set
 Clear

Export to a file File Format: [Dropdown]

Preview Execute Schedule

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.

1 / 1

Send Email

FILING_COUNTY equal Polk
 Filing Date between 12/01/2020,12/28/2020

Marriage Registrations
 STATE OF IOWA
 IOWA DEPARTMENT OF PUBLIC HEALTH

Run Date: 12/30/2020

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

Total Number Filed: 9 Page 1 of 1

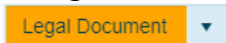
Marriage Registrations report appears. Click the print icon located in the upper right corner of the screen.

Basic Convention

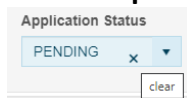
1. **Asterisk in Red** – Absolute (hard edits) required fields.
2. **Date Fields** – Slashes for date fields are masked in/just type the numerals or click on the calendar. MM/DD/YYYY
3. **Hyphen** - For any numeric fields that require hyphens are mask in – just type the numerals (i.e. Social Security 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.

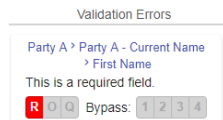
7. **Orange Field** - The orange color field indicates the item is not listed on the dropdown.



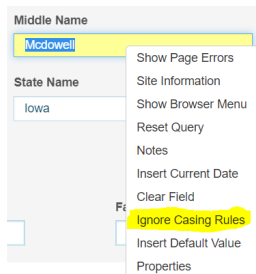
8. **Clear Dropdown Fields** – To clear the dropdown field click on the “X”.




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)