State of Rhode Island
Department of Health
Electronic Vital Records System
(RIVERS)

Fee City/Town User Training Guide
Document
Version 1.4
09/07/2021
# Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Version of System</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/27/2021</td>
<td>Initial Draft</td>
<td>1.0</td>
<td>Abigail Kauffman</td>
</tr>
<tr>
<td>07/29/2021</td>
<td>Content Additions</td>
<td>1.1</td>
<td>Abigail Kauffman</td>
</tr>
<tr>
<td>08/05/2021</td>
<td>Content Additions</td>
<td>1.2</td>
<td>Abigail Kauffman</td>
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<tr>
<td>08/30/2021</td>
<td>Content Changes</td>
<td>1.3</td>
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</tr>
<tr>
<td>09/07/2021</td>
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1.0 About the RIVERS Fee Application City/Town Office Training Guide

The RIVERS Web-Enabled Electronic Fee & Issuance System improves timeliness and accuracy of transactions related to such in the State of Rhode Island.

This guide is intended to provide step-by-step exercises that will allow the City/Town user to explore functions and features related to the RIVERS Fee and Issuance module. Individual tasks will help City/Town users gain experience in completing the many functions available within the system. The process will also allow the City/Town user to understand general concepts associated with the application. Working through these exercises will ensure that all features of the application are understood in order to provide an efficient process in day-to-day business operations.

The exercises contained in this guide will in many cases provide specific answers to questions concerning the features of the system. These exercises should be executed when the City/Town user is accessing a test or training site rather than the production site.

1.1 Intended Audience

This training guide serves as a comprehensive reference for City/Town users of the RIVERS Fee & Issuance module. City/Town users may reference this guide in order to acquire a deeper understanding of the Fee & Issuance module, as well as for information regarding the module’s use.
2.0 List of Terms and Phrases

Throughout this training guide, there will be a wide variety of terms and phrases used in order to aid the City/Town user in the navigation and use of the RIVERS Fee module, and to help City/Town users better conceptualize the functionality of the System. Some of these terms and phrases will be repeated throughout the document and serve as a vocabulary benchmark by which City/Town users can reference to aid in the full understanding of the functionality and processes being described. Below is a list of the frequently used terms and phrases, as well as some examples and explanations regarding what the terms and phrases mean.

2.1 Navigational/User Interface Terms – Toolbars

Throughout this training guide, there are different types of toolbars that will be referenced in order to help guide the City/Town user in performing the function/action that is desired. Below are some common terms, pictures, and explanations of the toolbars that City/Town users will encounter in the RIVERS Fee module.

2.1.1 Home Page

The home page is the primary page that is displayed following logging-in to the System and selecting one’s location.

1. RIVERS City/Town Office Home Page

2.1.2 Top Toolbar

The top toolbar is the uppermost toolbar that lists the various modules deployed to the State of Rhode Island, and at the City/Town user’s disposal.
2. RIVERS City/Town Office Top Toolbar

2.1.3 Functions Toolbar

The **Functions Toolbar** is located directly under the **Top Toolbar** and is the primary toolbar used when performing specific functions within the module. This toolbar typically contains multiple menus.

3. RIVERS City/Town Office Function Toolbar

2.1.4 Actions Toolbar

The **Actions Toolbar** is located directly under the **Functional Toolbar**. Actions include, but are not limited to: Creating New Records, Saving Records, and Deleting Records.

4. RIVERS City/Town Actions Toolbar

2.1.5 Information Toolbar

The **Information Toolbar** is located under the **Actions Toolbar**, and displays information related to the record or function selected. For example, below is a screenshot of an existing record within the **RIVERS Fee** module.

5. RIVERS City/Town Office Information Toolbar

2.2 Frequently Used Terms and Acronyms

**System**: The term system will be used as a reference to RIVERS in its entirety.
Module: The RIVERS system is broken-down into multiple self-contained modules that operate independently from one another to deliver separate functionalities to different entities throughout the State of Texas.

Resolved: A field that has been filled out. An unresolved field would indicate that a field is empty.

Work Queue: A drop-down menu on the Informational Toolbar that contains all of the records currently awaiting action.

Button: Any selectable item on a page that performs an action, such as: generating a window, redirecting City/Town users to another page, etc.

Icon: Buttons represented by pictures, usually located on the Actions Toolbar.

Panel: A specific section or area of a page or window

Drop-Down Field or Menu: A field or menu that when clicked will open to reveal pre-populated options that can be selected in order to resolve a field.

Pre-Populated: A field that has an automatically generated value and does not require input.

Disabled Fields: A field that will not accept user input and will appear grayed-out.

AR: Initials for Accounts Receivable.
3.0 System Overview

3.1 Navigation, Data Entry and Tool Tips

The RIVERS Fee module is designed with intuitive interfaces for a seamless experience. Mouse navigation, keyboard navigation, and Genesis’ proprietary tools help streamline workflows.

3.1.1 Using the Mouse

Use the mouse to navigate the RIVERS Fee module. Click various items (hyperlinked text and/or icons) on the menu to perform functions related to City/Town processes. The mouse can also be used to navigate from one field to another during data entry.

3.1.2 Using the Keyboard

Use the following keys to navigate through the Fee module without using the mouse:

**Tab Key**: Moves cursor from one field to another. When a field is selected, the field will be highlighted with a green background, blue background, and in some cases, a frame will form around the selected field to aid the user.

**Shift + Tab**: Reverses the tab order and moves focus back to the previous control.

**Enter**: Initiates the action selected. Pressing Enter is equivalent to double-clicking the mouse.

**Left/Right/Up/Down Arrows**: Used to navigate within a field or within a pick list. The PgUp and PgDn keys may also be used.

**Down Arrow for Dropdown Box**: Pressing the Down Arrow key in a selected drop-down box will reveal available selections in a list form. Use the Up or Down arrows to scroll through the list.

**Type-ahead Logic**: Type-ahead logic provides another way to save time by eliminating the number of keystrokes to pull up an item from a drop-down box. This feature enables the user to begin typing and the list will filter according to what the user types.

**Space Bar**: Used to toggle a check box item on or off.
4.0 Fee & Issuance Overview

4.1 Exercise 1—Login

This exercise provides an overview of the RIVERS Fee & Issuance access process, as well as introduces concepts related to functionality associated with ‘City/Town user security profile’ and the login ‘location’ record access rules.

To complete this exercise, the City/Town user will need:

A computer with Internet access meeting the following minimum system requirements:

- Live Internet connection
- Widely used JavaScript enabled standard web browser (IE8+, Mozilla Firefox, etc.)
- Java runtime
- Adobe acrobat reader for forms and letters
- MS Excel for accessing/running reports

1. Launch your internet browser (i.e. IE8+, Mozilla Firefox, etc.)
2. Enter the following address in the URL box or select from Favorites: https://riverstest.rihosting-by-genesis.com/RIUIV2/Welcome.htm
3. The application splash page will load, as pictured below:

4. Click the Login to RIVERS button.
5. The Terms of Use Screen will load, as pictured below:
6. Click the **Yes** button to confirm agreement with the terms of use.
   a. Click the **No** button to be returned to the RIVERS splash page.

7. The RIVERS login screen will display:

8. Type in the Username provided to you to login - this is not case sensitive.
9. Press the **Tab** key on the keyboard to advance focus to the Password field (or use the mouse and click on the password field if you prefer).

10. Type the password provided to you to login.

11. Press the **Tab** key on the keyboard to advance focus to the **Log In** command button.

12. With focus on the Log In command button press the **Enter** key to execute the Login command.

   - Optional approach: After entering the password you can also use the mouse to point to and left click on the **Log In** command button instead of using the **Tab** and **Enter** keys.

13. Login Locations – If you are associated with more than one location, the Location Selection Window pictured below will contain all locations assigned to your account. If you create NEW records while logged in under a given location, they will become associated with that location.

![Location Selection Window](image)

9.Select Location

14. Note that the field on the screen has a set of arrows on the right side. This indicates that there is a dropdown list associated with this item.

   - Press the **Tab** key to set focus on the Select Location field. This will open the list.
   - Use the arrow keys to highlight a desired location followed by the **Tab** key to select it and set focus on the **OK** command button.
   - Press **Enter** to finalize the location choice and access the application.

15. Mouse – There are intuitive mouse alternatives for navigating the application and selecting items. Practice alternating the use of mouse and the keyboard approaches to determine the optimal method.

**Session Time Out:**

During these exercises it may take much more time to complete operations that would be true in actual use of the application. If the system has not detected a business transaction (save a record, search for a record, login) within 20 minutes, the session will time-out and you will not receive further responses from the system. A warning will appear to alert you to this. If the system appears to stop responding (no choices in some pick lists, cannot save a record, cannot retrieve a record, etc.) it is likely that a session time-out has occurred. To recover from a session time-out,
close the application Internet browser and re-login to start a new session. Saving the work you are doing frequently will prevent session time-outs. If you will not be using the application for a time you should close it and then login again when you need it.

16. Exit the application by using the mouse to point to the Log Out icon or to the Function ➔ Exit Application menu item and then click once with the left mouse button. Refer to the screenshot below for a visual representation of logging out of RIVERS:

10. Exit Application

4.2 Exercise 2—Accessing the Fee & Issuance Module

This exercise describes how to access the Fee & Issuance module within the application.

1. First, start by logging-in following the directions in the previous exercise. Doing so will present you with the RIVERS Homepage:

11. RIVERS Fee Home Page
2. Select the Fee module by clicking on the appropriate tab, shown above. This will open the Fee module and present the City/Town user with the necessary toolbars and functionality in order to begin utilizing the various features of the module.

4.3 Exercise 3—Fee Dashboard

This exercise describes how to access and utilize the Fee Dashboard within the application.

The Fee Dashboard provides a summary of all completed and pending Fee transactions in the RIVERS Fee and Issuance Module. The dashboard provides a summary of the total # of each transaction type, the average days to completion for the transaction type and the date of the latest transaction of the transaction type.

1. First, start by logging-in and accessing the Fee & Issuance module by following the directions in the first two exercises. Doing so will present you with the RIVERS Fee Home Page:

   ![RIVERS Home Page](image)

   2. Click the Show Dashboard button (pictured above) to open the Fee Dashboard:
3. Users may click the More Details link (pictured in above screenshot) for a specific transaction type in order to gain further information about the individual transactions that have been completed or those that are pending in the RIVERS Fee Module.

The Request Details screen provides details on individual transactions of a certain type that include the Requestor Name, Transaction Type, Date of Transaction Creation, Date of Transaction Completion and the user assigned to the transaction.
5.0 Fee Requests and Transactions

In order to create a new request in the RIVERS Fee module, navigate to the Fee tab as described in the previous exercise of this training guide.

1. Click on the **Function** tab on the **Functional Toolbar**, and from the drop-down menu select **Fee Registration**.

   **Note**: That action will generate a screen that will enable State users to either initiate a **New Request**, a **New Transaction**, or it will allow State users to enter in the starting cash.

![Fee Registration Screen](image)

**14. Fee Registration Screen**

2. Before entering in a new transaction, the user must enter in the starting cash in the registered. Select the **Starting Cash** button.

3. Starting Cash Window will appear. Enter in the starting cash amount:

![Starting Cash Amount](image)

**15. Starting Cash Amount**

4. Select **Save** and the following message will appear:
16. Starting Cash Saved Successfully

17. New Request Data Entry

This is the main screen when creating a new request.
5.1 Exercise 4 – Using the Actionable Toolbar

The first new toolbar that was generated by navigating to the New Request Data Entry screen is the Actionable Toolbar.

Each icon on the Actionable Toolbar represents a separate function within this section of the Fee module. Below each are listed as they appear from left-to-right. Now, take the time scroll-over each one so that you can gain familiarity with what each does. Below is a cheat-sheet that briefly outlines what action is associated with each icon.

- **New**: Create a new record
- **Search**: Search for an existing record
- **Save**: Save the existing record, if all mandatory fields have been entered
- **Cancel**: Cancel changes on the current record
- **Delete Request**: Delete an existing request
- **Complete Request**: Complete an existing request
- **Clone**: Clone an existing request
  
  **Note**: Cloning a record clones the Requestor’s Information only. It does **not** clone Identity Information or any other information.

- **Suspend**: Suspend request
- **First Record From Work Queue**: Goes to the first record in a work queue from the current position in the work queue
- **Previous Record From Work Queue**: Goes to the record immediately preceding the current record in the work queue
- **Next Record From Work Queue**: Goes to the record immediately after the current record in the work queue.
- **Last Record From Work Queue**: Goes to the last record in the work queue from the current position in the work queue

Now that all of the basic navigational functionality has been established, City/Town users are ready to **Create a New Request**. As directed in this section of the training guide, once the City/Town user has navigated to the New Request Data Entry screen, and selected New from the Actions Toolbar, City/Town users will have the ability to capture and/or edit requestor information (the person requesting the service) and designate appropriate departments to process the request.

This section of the module provides the mechanism to designate how the request was received. The available designations are as follows:
Available Request Types:

- Counter
- Third Party- GoCertificates

This tab also provides the City/Town user the ability to enter information about identifying documents, shipping information, as well as providing a mechanism for City/Town users to record comments relative to the request.

1. Start by selecting a Request Type from the aforementioned drop-down menu.

2. Next, make up some data to fill into the fields marked with the red asterisks. For example, in the Last Name field, you may choose to type SMITH.

In addition to the above fields, City/Town users will also note two additional checkboxes that can be selected in the Requestor Information panel. The two checkboxes are as follows:

- Requestor is Minor
- No Return Address Provided

These checkboxes can be selected in order to indicate the following:
• **No Return Address Provided**: If there is no return address attributed to the Requestor, this box may be checked to indicate as such.

• **Requestor is Minor**: Indicates that the Requestor is a minor, under the age of 18 years old.

3. Once you have completed filling-out the necessary fields in the **Requestor Information** panel, move to the **Identity Information** panel and also fill-in the fields marked with the red asterisks with fabricated/made-up information in order to proceed.

4. Once you have inputted all of the aforementioned information, taking special note to input information into the fields marked with red asterisks, you will be able to save the request by clicking on the **Save Request** button.

5. If the request was saved successfully, a **Fee Registration** window will generate indicating that the ‘Record saved successfully.’

5.2 Exercise 5– Creating a New Transaction

Once the record has been saved, City/Town users will have access to the final three sections of the **New Request Data Entry** screen. These final sections can only be completed after saving the request.
The final three sections of this screen are as follows:

- **Transaction Information**
- **Payment Information**
- **Shipping Information**

Each of these panels has separate and unique functions that enable City/Town users to add additional information to the request.

1. To add new transaction information to this request, City/Town users will start by selecting the **Add New** button from the toolbar:

![Add New button](image)

That action will open the **Transaction Information** window, enabling City/Town user input.

23. **Transaction Information**

This window has multiple fields to resolve before it can be saved to the **Transaction Information** panel. The first field is the **Transaction Category** field, which will require the City/Town user to select which module this transaction is applicable to.
2. Select **Death** for example purposes

![Transaction Category]

Next is the **Transaction Type** field. This field will allow City/Town users to select the specific type of transaction associated with this record.

**Note:** Depending on what is selected from the **Transaction Category**, the options in **Transaction Type** will change.

In this example, you already selected **Death** as the **Transaction Category**.

3. Select **Death Certificate** from the drop-down list for this exercise.

![Transaction Type]

Once a **Transaction Type** has been selected from the drop-down menu, City/Town users must select the **Requestor Relationship** from the next drop-down menu.

![Requestor Relationship]
Similar to the previous fields, there are multiple options at the City/Town user’s disposal in this field, and it is important that the City/Town user take care in selecting the appropriate one.

4. For this example, select **General Public** from the drop-down menu

The next field that needs to be resolved is the **Transaction Reason** field. Like the fields before it, this is also a field which features a drop-down menu.

![Transaction Reason dropdown](image)

**27. Transaction Reason**

The last field in this panel that requires input in order to save this **Transaction Information** is the **Quantity**. City/Town users may enter in any whole number up to 99. The **Cost** field will auto-populate depending on the value entered in the **Quantity** field.

5. For this particular example, enter five (5) into the **Quantity** field

   **Note:** The **Cost** field is grayed-out, indicating that it does not require City/Town user input and is auto-populated

   **Note:** Each different **Transaction Type** has a different **Cost** associated with it. These values have already been implemented into the Application, per the State of Rhode Island’s specifications.

![Quantity and Cost](image)

**28. Quantity and Cost**

   **Note:** All of the fields mentioned above have a red asterisk next to them indicating that they are **absolute mandatory** fields that must be resolved before this can be saved. The following fields are not mandatory fields and are merely for administrative purposes.

   **Note:** City/Town users may adjust the **Cost** of a document through the **Edit** process described later in this exercise.

The next seven (7) options for City/Town user input are the **Department Assign**, **Transaction Reason—Other**, and **Transaction Comments** fields; along with the **Issued from Paper**, **Veteran Benefits**, **Birth Verification** and **No Fee** checkboxes. Each is briefly explained below:

- **Department Assign**: This field allows City/Town users to assign a specific department to the transaction
- **Transaction Reason - Other**: Indicate a reason for a transaction.
- **Transaction Comments**: Write specific comments related to a transaction.
- **Issued From Paper** check box: Indicate that the transaction was issued from paper
- **No Fee** check box: Indicate a zero-dollar transaction.
- **No Signature** check box: Indicate that the State registrar’s signature should not be printed.

6. Select **Special Issuance-Central Print Room** from the Department Assign drop-down menu.

It is also important to note that there are two additional functionalities on this page: the **Upload Document** and **Scan Document** buttons. Each are explained briefly below:

- **Upload Document**: This button will allow City/Town users to upload any associated documents to this specific transaction
- **Scan Document**: This button will allow City/Town users to use their scanning device to scan a document and attach it to this specific transaction

![Upload Document and Scan Document buttons]

**29. Upload/Scan Document**

### 5.2.1 Upload Document

To upload a document to a particular record, press **Upload Document**, which will generate the following window:

![Upload Document window]

**30. Upload Document**

Enter the **Document Type**, **Who Issued** the document, and the **Date Issued** into the corresponding fields and then click **Upload Document**. Pressing **Upload Document** will generate the Document Upload window. To attach a document, click **Browse** and locate the file. Then, click **Open**. This will load the document file path into the field.
To continue the **Upload** process, click **Upload**. To return to the previous screen, click **Cancel**. A notification will appear when the file has successfully uploaded or if the upload has failed.

![Fee Registration](image)

31. **File Uploaded Successfully**

Once the document has been uploaded, a **City/Town User** will have the ability to view the document and download it from the Identity Information panel on the New Request Data Entry screen.

To do this, save the transaction and return to the New Request Data Entry screen and click the **Show Document** button on the Identity Information panel.

At this point users may choose to click the **Download** link to initiate the process of downloading/saving the uploaded document or close the browser window to return to the RIVERS Fee module.

5.2.2 **Scan Document**

To scan a document to a particular record, press **Scan Document**, which will generate the following window:
32. Scan Document

Enter the Document Type, Who Issued the document, the Date Issued and the Image Description into the corresponding fields, select the desired scanner from the List of Scanners, select RGB from the Scan Type and then click Scan Document.

Pressing Scan Document will load the image in the image preview section of the screen. To save the document, click the Save Document button.

A notification will appear when the file has successfully saved or if the save has failed.

Once the document has been scanned a City/Town User will have the ability to view the document and download it from the Identity Information panel on the New Request Data Entry screen.

To do this, save the transaction and return to the New Request Data Entry screen and click the Show Document button on the Identity Information panel.

At this point users may choose to click the Download link to initiate the process of downloading/saving the uploaded document or close the browser window to return to the RIVERS Fee module.

When that information has been entered you may Save your progress by clicking on the Save button at the bottom of the window.
If the record was saved successfully, the following message will appear indicating as such:

![Message: Transaction saved successfully.]

33. transaction Saved Successfully

Click the **OK** button and proceed to the New Request Data Entry screen to see the added transaction.

![Transaction Information]

34. Transaction Information

It is at this point that users will have the ability to use the other options on the toolbar at the bottom of the **Transaction Information** panel. Below, each is briefly explained.

- **Edit**: This button enables City/Town users to edit the selected transaction in order to either add more data, or edit the data already entered.
- **Delete**: This button enables City/Town users to delete a selected transaction.
- **Void**: This button enables City/Town users to void a transaction after it has been printed.

  **Note**: If a City/Town user wishes to remove the transaction prior to printing, the **Delete** button would be used.

- **Find Record**: This button will enable City/Town users to search the system for registered records matching the data entered in the transaction. When selected, the **Fee Record Search** screen will appear:
3.5. Fee Record Search

Users are able to search for, view and assign the record to the relevant transaction. Selecting the View button will open the record in a watermarked PDF.

- **Print**: This button enables City/Town users to print the transaction.
- **Reenter DCN**: This button enabled City/Town user to reenter security paper DCN to the record.
  
  **Note**: This action can be performed only when the record has been printed.
- **Add Letter**: This button gives City/Town users the ability to add a letter to the **Transaction Information** panel, by attaching it to this specific request.

5.3 Exercise 6—Editing an Existing Transaction

The last item that is important to point out is a function within the **Edit** functionality. When a City/Town user selects an item from the **Transaction Information** panel and then clicks on the **Edit** button, the **Transaction Information** window will re-appear with all of the transaction information:
1. Select **Save**. If the adjustment saves successfully, a notification will appear. Also, the price reflected in the **Transaction Information** panel will also update to the new price entered.

5.4 Exercise 7—Creating Payment Information

The **Payment Information** panel is the second panel in the **New Request Data Entry** screen. Users can add payment information in this panel once a transaction has been created in the **Transaction Information** panel.
37. Payment Information

The **Payment Information** buttons include:

- **Add New**: Allows City/Town users to add new payment information to the panel
- **Edit**: Enables City/Town users to edit previously entered payment information
- **Delete**: Enables City/Town users to delete any existing payment information within the panel
- **Re-assign**: Enables City/Town users to re-assign specific and existing payment information within the panel
- **Receipt**: Allows City/Town users to create a receipt for an existing payment transaction

1. To begin adding a new entry within the **Payment Information** panel, first select the **Add New** button from the bottom of the panel.

This will generate the **Payment Information** window with the **Payment Information** panel, and the **Payer(s) Information** panel.
2. In order to begin, first select the appropriate Payment Type from the drop-down menu. For this example, let’s select Cash.

Note: Depending on the Payment Type selected, different fields will become mandatory fields. For example, when Cash is selected, the only mandatory field is Amount Received. However, if Cashier Check, Check, or Money Order are selected, the Reference # and Reference Date fields become mandatory fields—as well as the Amount Received field. If Credit/Debit Card is selected, the mandatory fields are Amount Received, Reference # and Reference Date.
Lastly, if **Gift Certificate** is selected, the mandatory fields are **Amount Received** and **Reference #**.

3. Once this has been selected, enter all the information that is relevant/known and entered a comment in the **Payment Comments** section (if applicable).

Next, let’s discuss the **Payer(s) Information** panel.

![Diagram of Payer(s) Information panel]

**4.1. Payer(s) Information**

The **Payer(s) Information** panel contains all of the information about the person making a payment towards a transaction.

Within this panel, City/Town users have two options: to either enter all of the information manually, or to select the **Payer(s) Same as a Requestor** check box at the top left corner of the panel.

The **Payer(s) Same as a Requestor** check box should be selected if the payer is the same as the requestor, because it minimizes data entry and helps reduce errors.

If the payer is the same as the requestor, the information will automatically load into the fields. Uncheck the box to enter a different payer; all of the fields will become enabled.

4. For this example, let’s select the checkbox mentioned above. Next, enter all known payer information.
5. Once the information has been generated, click on the **Total/Done** button at the bottom of the screen. Conversely, should a City/Town user wish to cancel the payment, City/Town users must select the **Cancel** button. Lastly, should the user wish to simply acquire a subtotal, they may select the **Sub-Total** button to generate one.

42. **Total/Done, Cancel, and Sub-Total Buttons**

If the record saves successfully, the following message will appear:

43. **Record Saved Successfully**

6. After selecting **OK**, the payment will display in the **Payment Information** panel.

5.4 **Exercise 8—Search for a Record**

To search for a record on the **Fee Record Search** screen:

1. Enter the known record information into the search fields in the **Requested Information** section of the **Fee Record Search** screen.

2. Click the **Search** button to execute the search.

3. If a matching record or records is found, the search results grid will be populated with the matching record(s):

44. **Fee Record Search Results**

   a. If a matching record is not found, the following message will be displayed:
45. No Records Found for Given Search Criteria

i. To suspend the transaction, click the **Suspend** button and the system will display the following message:

![Fee Registration - Suspend Message](image)

46. Request Suspended Successfully Message

ii. To complete the transaction, click the **Complete** button and the system will display the following message:

![Fee Registration - Complete Message](image)

47. Printing Not Found Letter

b. Click the **OK** button and the system will display the following message:

![Fee Registration - OK Message](image)

48. Not Found Letter Added Successfully

c. Click **Not Issued** button and the system will display the following message:
5.4.1 Search Fee

The Search Fee functionality is an automatic $2 fee that will be added onto a transaction during the assigning of a record after the user has conducted two searches where no records were found.

The Search Fee will be added onto any additional searches made after the initial two searches resulting in no records found.

5.4.1.1 Search Fee Checkbox

After the three searches were conducted for a record, the Search Fee Checkbox will become checked:

Note: The fee will only be placed on a transaction if the user selects “Ok” from the following prompt:

5.4.1.2 Search Fee Counter

The system will keep track of the number of searches for a record that will be charged with the Search Fee:

Note: Additional Fee of Two Dollars for Searching

This indicates that every search moving forward will have the additional Search Fee added.

Note: Search Count
5.4.1.2.1 Adjust Search Counter

The Search Fee functionality allows for the Search Count to be adjusted upon supervisor pin approval:

1. Select the **Adjust Search Counter**.
2. Enter in the corrected count into the **Adjust Search Counter**:

3. Once the correct amount is entered, the system will ask for a supervisor pin and then will correct the Search Counter at the top of the Fee Record Search.

5.4.2 View a Record

1. Enter the known record information into the search fields in the Requested Information section of the **Fee Record Search** screen.
2. Click the **Search** button to execute the search.
3. If a matching record or records is found, the search results grid will be populated with the matching record(s)
4. Click on the desired record in the search results grid to select it and click the **View** button.
5. A PDF window containing a watermarked version of the record will open:

5.6 Exercise 9—Editing a Payment

This exercise will go through the process of editing a payment in the system.

1. In order to edit a payment in the Payment Information panel, highlight the record and press **Edit**.
55. Edit Button

Clicking **Edit** will cause the Payment Information screen to load.

56. Payment Information- Edit Mode

2. Once the information has been edited, click on the **Total/Done** button at the bottom of the screen. Conversely, should a City/Town user wish to cancel the payment, City/Town users must select the **Cancel** button.

If the record saves successfully, the following message will appear:
3. After selecting **OK**, the updated payment will display in the **Payment Information** panel.

### 5.7 Exercise 10—Deleting a Payment

This exercise will go through the process of deleting a payment from the System:

1. In order to **Delete** a payment from the **Payment Information** panel, highlight the record and press **Delete**.

### 58. Delete Button

Clicking **Delete** will ask for confirmation of the deletion.

### 59. Delete Record?

2. Select **Yes** from the options
In order to proceed, a supervisor will have to enter their PIN, along with the reason for the deletion. If the supervisor is not available, or is unable to enter his/her PIN, the attempt to delete the record can be cancelled by selecting the Cancel button. If this is an approved deletion, supervisors enter in their PIN, enter a reason for the deletion and click on OK to continue.

If the supervisor incorrectly enters his/her PIN into the System, the following rejection message will appear, and return the City/Town user to the previous window to try and re-enter the correct information:

3. For this example, enter in a valid supervisor PIN, then input ‘MISTAKE’ for the Reason.

If the correct PIN is entered, and OK is selected, the following message will appear confirming that the record has been deleted:
62. record Deleted Successfully

Users will then be returned to the main screen and see that the record has been successfully removed from the Payment Information panel.

5.8 Exercise 11—Re-Assigning a Payment

Sometimes, when there are multiple transactions present in the system for an individual record, it will become important to understand the Re-Assign functionality. The Re-Assign functionality enables City/Town users to delineate the payment received and locate it to specific transactions within the system.

63. Re-assign Button

In the Payment Information panel, there is one payment for $50.00. To assign the $50.00 to a specific transaction, select the $50.00 payment from the Payment Information panel and press Re-Assign.

This will generate the Re-Assign Payment window, so that the payment can be assigned to the correct transaction.
In this window, all of the transactions from the Transaction Information panel are present. From left to right, the columns are as follows:

- Registrant Name
- Transaction Type
- Transaction Date
- Transaction Amount
- Transaction Balance
- Pay in Full
- Amount Paid

In order to assign the $50.00 to a specific transaction, select the Pay in Full check box on the same line of the transaction that needs to be reconciled, and select OK.

If the payment was re-assigned successfully, the following message will appear:

5.9 Exercise 12—Generating a Receipt

1. In order to generate a receipt for a payment, highlight the first payment in the panel.
2. Select the Receipt button at the bottom of the panel.
66. Receipt Button

This will generate a receipt as a PDF that can be printed and provided to the payee.

Note: Receipts can be printed even after the record has been completed.

5.10 Exercise 13—Shipping Information Panel

The Shipping Information panel provides City/Town users with the ability to initiate shipment of transaction requests, after payment has been reconciled. This panel is composed of an information field, and three buttons at the bottom of the panel. The options at the City/Town user’s disposal are as follows:

- **Add New**: Enables City/Town users to add a new shipment
- **Edit**: Enables City/Town users to edit an existing shipment
- **Delete**: Enables City/Town users to delete an existing shipment

1. In order to add a new shipment to the Shipment Information panel, select **Add New** from the buttons at the bottom of the panel.

This will generate the Shipping Information window:
The Shipping Information window is divided into two separate panels, and two additional sub-panels. The first panel within the window is the Shipping Information panel at the top of the window.
If the shipping address is the same as the requestor’s address, check the box beside *Address Same as Requestor*, and all the information will be pre-populated and auto-filled, as seen in the preceding screenshot.

2. For this example, let’s check the box

   Note: When this option is selected, all of the fields relating to the requestor and their address will be disabled. In order to enable these fields, uncheck the box.

   Note: If *Hand Delivered* is selected, both the check box and all of the address-related fields will be disabled.

3. To start a shipment, select a *Shipping Method* from the drop-down menu. City/Town users will notice multiple options at their disposal. For this example, select *Standard*.

The next panel within the Shipping Information window is the *Enclose(s) Information* panel, users can determine what documents need to be included in a shipment.
The Transactions sub-panel contains all of the documents that have previously been initiated in the Transaction panel and paid for in the Payment Information panel. Each item in the Transactions sub-panel can be selected or expanded depending on the type of document requested.

Note: The plus (+) sign next to each folder indicate that they can be expanded, and the minus (-) signs indicated the folder can be collapsed.

Once the document has been selected, click the Add arrow to the right of the Transactions sub-panel to move it to the Enclosed sub-panel to enclose the document in the shipment. Any amount of documents may be enclosed in a shipment. To remove a document from the Enclosed sub-panel, click the Remove arrow to the right of the Transactions sub-panel.
Additionally, the shipment will appear in the Shipping Information panel.

5.11 Exercise 14—Editing a Shipment

After a shipment has been created, City/Town users can go back and edit that shipment should they need to make alterations to the record.

1. In order to do so, highlight the first record in the panel.
2. Click the **Edit** button at the bottom of the panel.

This action will re-generate the Shipping Information window with the previously entered information pre-populated in each field.

3. In the Shipping Note field type: ‘Shipment returned.’
   Additionally, selections made in the Enclose(s) Information section can also be edited.
4. Once the information has been edited, click **Save**. To cancel the process, press **Cancel**.
5. Selecting **Yes** will generate the following message:

The updated shipping transaction will then display in the Shipping Information panel.

1. Highlight the first shipment in the panel
2. Select the **Delete** button at the bottom of the panel
76. Delete Button

This will generate a window asking the City/Town user if they are sure they wish to delete the record:

77. Delete this Record?

3. Select Yes

5.13 Exercise 16—Navigating to Search Transactions

In some instances, it is important to have the functionality to search for existing transactions within the Fee application. The application is equipped with a comprehensive search functionality that will enable City/Town users to run queries on all existing transactions with the System that can be based on a wide array of parameters.

1. In order to begin, navigate to the RIVERS Fee application, then Fee Registration. Once Fee Registration is selected, the following page will generate:
5.14 Exercise 17—Performing a Search

1. To perform a search, enter in the information that is known into the appropriate search fields. For this example, let’s assume that we know the Request Number# of the transaction that we wish to search for is 100. As such, enter 100 into the Request Number# field:
The last two search-related criteria at the City/Town user’s disposal are the Type of Search option, as well as the Request Status search option.

The first item to discuss in the Type of Search option. There are two options at the City/Town user’s disposal—Wildcard Search and Soundex Search.

- **Wildcard Search** – A wildcard search will take the information inputted into the fields and look for exact matches to the data entered
- **Soundex Search** – A soundex search will take the information inputted into the fields and search for exact matches, as well as matches that sound similar to the data entered

The other search option at the City/Town user’s disposal is the Request Status search option. From the drop-down menu to the right of Request Status, City/Town users may select Complete, Incomplete or Suspend. This option can be particularly useful when City/Town users are searching for transaction and know whether or not they are completed, incomplete or suspended transactions.

2. Once you have entered in all of the desired information, proceed on clicking the Search button at the bottom of the screen to generate the search results.
6.0 Search In-Progress Records

When a fee request search results in a record not being located, users may search all in progress vital records from the Search In-Progress Records screen. To access this screen, the user must be currently in the Fee Request Data Entry screen.

1. While on the Fee Request Data Entry screen, select Functions → Search In Progress Records.

2. The Search In Progress Vital Record screen will load, as pictured below.

![Search In Progress Vital Record](image)

To search for an in-progress record, enter search criteria into the fields in the Requested Registrant Information section of the screen and click the Search button. Clicking the Clear button will clear all information entered into the search fields.

If a matching record or record(s) are found, the record(s) will be populated in the search results grid.
83. Search Information

If a match is not found, the system will issue the following message:

84. No Records Found

Users will have the ability to notify record owners via email that a fee request has been initiated for an in-progress record. To notify the record owner, highlight the desired record and click the **Notify Record Owner** button.

The following message will appear:
85. Email Selected Record?

If Yes is selected, the following message will appear:

86. Request Sent to State
7.0 Fee Module Tools

From the Fee module, open the Tools drop-down menu on the Functions toolbar.

7.1 Exercise 20—Add/Update Starting Cash

To add or update the starting cash, go to Tools → End of Day → add/Update Starting Cash. The following message will appear:

![Image of Fee Registration dialog]

87. Update Starting Cash?

![Image of Supervisor Override dialog]

88. Supervisor Override

7.2 Exercise 21—Printer Setup

From the Fee Home page, go to Functions → New Request and then from the New Request Data Entry, go to Tools → Utilities → Printer Setup.
7.2.2 User Printer History

Selecting the User Printer History icon will generate a window that shows users of all of the previous print-related options selected.
The **List of Printers** drop-down menu displays a list of all of the printers that the computer recognizes as a print destination.
The Available Print Processes panel lists the processes that can be performed from the selected printer. Select a print process from the Available Print Processes panel and then press the Right Arrow key.

The selected processes will then appear in the Assigned Print Processes panel.
To add all processes to the Assigned Print Processes panel, click Add All.
To remove all processes from the Assigned Print Processes panel, click Remove All.
When all print processes have been assigned, press the Save icon.

7.2.5 Changing the Printer
To change the printer, remove the processes that were assigned to the previous printer, and then add the new printer and new processes.

7.3 Exercise 22—Paper Inventory Void
The Paper Inventory Void tool tracks the inventory of security paper shipped to City/Town registrar offices.

1. To access the Paper Inventory Void tool, go to Tools → Paper Inventory Void.
   The Paper Inventory Void Screen will load:
95. Paper Inventory Void

96. Paper Inventory
7.4 Exercise 23— Prepare Daily Close

1. Select the **Tools → End of Day → Prepare Daily Close** menu item from the Fee main Menu. The Prepare Daily Close window will appear:

![Prepare Daily Close Window](image)

97. Prepare Daily Close

- Total Cash
- Total Checks
- Total Money Orders
- Total Cashier Check Changes
- Total Credit/Debit Changes

The Total Amount section will auto populate.

3. Select the **Commit** button. The following message will appear:
98. Prepare Daily Close?

99. Enter Pin

1. Select the **Tools → End of Day → Close Drawer** menu item from the Fee main Menu. The Close Drawer window will appear.
2. Select the **Soft Close Drawer** button. The Soft Close Drawer window will appear:

![Soft Close Drawer window](image)

101. **Soft Close Drawer**

- Total Cash
- Total checks
- Total Money Orders
- Total Credit/Debit Charges
- Total Cashier Check Charges

4. When all the totals are correct, select **Confirm** to continue with the soft close. Select **Cancel** to cancel the soft close. Once **Confirm** has been selected, the following message will appear:

![Confirm Soft Close Drawer message](image)

102. **Soft Close Drawer?**
5. Select Yes. The following message will appear:

103. Soft Close Drawer Successful

1. Select the Tools → End of Day → Close Drawer menu item from the Fee main Menu. The Close Drawer window will appear.

2. Select the Adjustment button. The following Message will appear:

104. Drawer Adjustment?

4. After selecting Yes, the user will have a supervisor enter in their pin and a reason for the adjustment:

105. Supervisor Override
After the adjusted amount is entered, select Save. The following message will appear:

Close drawer adjustment saved successfully.

Adjustment Saved Successfully

Adjustment

Summary Report
7.5.3 Close Drawer

1. Select the **Tools → End of Day → Close Drawer** menu item from the Fee main Menu. The Close Drawer window will appear.

2. Select the **Close Drawer** button. The following message will appear:

   ![Close Drawer Confirmation Message]

   **109. Close Drawer?**

   ![Close Drawer Successful Message]

   **110. Close Drawer Successfully**

1. Select the **Tools → End of Day → Prepare Daily Close** menu item from the Fee main Menu. The Prepare Daily Close window will appear:
111. Prepare Daily Close

- Total Cash
- Total Checks
- Total Money Orders
- Total Cashier Check Changes
- Total Credit/Debit Changes

The Total Amount section will auto populate.

3. Select the Commit button. The following message will appear:

112. Prepare Daily Close?
4. To save the daily close, select **Yes**. To cancel the request and return to the previous screen, select **No**. If **Yes** is select, the user will have to enter in their pin:

![Enter PIN](image)

113. Enter Pin

![Fee Registration](image)

114. Bank Deposit Prepared Successfully

The bank deposit will be done once a week on the RIDOH designated day. To perform the bank deposit, please follow the following steps:

1. Select the **Tools ➔ End of Day ➔ Make Bank Deposit** menu item from the Fee main Menu. The Close Drawer window will appear:

![Make Bank Deposit](image)

115. Make Bank Deposit

**Note:** The Total Cash Amt. will auto populate.

3. Review the amount in the following fields and adjust any if needed:
   - Total Cash
• Total checks
• Total Money Orders
• Total Credit/Debit Charges
• Total Cashier Check Charges

4. Once all of the denomination is entered, select **Commit**. The following message will appear:

116. **Save Bank Deposit?**

117. **Enter Pin**

118. **Bank Deposited Successfully**

After making the bank deposit, the user will be asked if they want to print the bank deposit form:
119. Print Bank Deposit Form?

Note: The user can print the bank deposit form again by selecting Tools → End of Day → Reprint Deposit Form and then entering the Deposit Date and Deposit Number:
8.0 Reports

8.1 Exercise 27—Running a Report

1. From the Fee Home page, select the desired report from the Reports menu.

2. A report options screen will appear:

   ![Example Report: Above Average Production Per Processor]

   **Note**: Similar to previous screens, fields marked with red asterisks (*) are mandatory fields and must be resolved in order for the report to generate.

   Generating a report as a PDF will automatically process the report and open it in a separate window.

   If Excel is selected as the output file type, the file will be downloaded and must be opened manually by the user.

   **Note**: If the entered search information does not pull a report that can display any of the requested data, a page indicating that the user needs to try a different search or alter the search information will generate.
9.0 Fee Configuration

The Email Configuration functionality found within the Fee Configuration module will allow the user to create new automated emails that will be sent from the RIVERS system. The Email Configuration functionality will also allow for authorized users to edit the existing automated emails being sent from the RIVERS system.

9.1 Exercise 28—Configure a New Automated Email

To configure a new automated email:

1. Select the Fee tab at the top of the Home Screen in order to arrive to the correct module and select the Configuration → Email Configuration menu item to load the Email Configuration screen as shown below:

   ![Email Configuration Screen](image)

2. Begin composing the body of the automated email.

3. When the need for a placeholder is determined, highlight the desired placeholder(s) and click the green arrow icon to place the placeholders in the body of the email.

4. Click the Active checkbox.

5. Click the Save button to save the new email.
a. Click the **Clear** button to clear the data entered into the Subject and Body fields.

9.2 Exercise 29—Edit an Existing Automated Email

To edit an existing automated email:

1. Select the **Fee** tab at the top of the Home Screen in order to arrive to the correct module and select the **Configuration → Email Configuration** menu item to load the Email Configuration screen as shown below:

   ![Email Configuration Screen](image)

   123. Email Configuration Screen

3. The selected email will load in the Email Configuration screen:

   ![Selected Email](image)

   124. Selected Email
4. Make the desired edits to the email content and click the Save button to save the changes.

   a. Click the Clear button to clear the data entered into the Subject and Body fields.