

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

Date	Description	Version of System	Author
07/27/2021	Initial Draft	1.0	Abigail Kauffman
07/29/2021	Content Additions	1.1	Abigail Kauffman
08/05/2021	Content Additions	1.2	Abigail Kauffman
08/30/2021	Content Changes	1.3	Abigail Kauffman
09/07/2021	Content Changes	1.4	Abigail Kauffman

Table of Contents

1.0 About the RIVERS ITOP Application Back Office Training Guide.....	7
1.1 Intended Audience	7
2.0 List of Terms and Phrases.....	8
2.1 Navigational/User Interface Terms – Toolbars	8
2.1.1 Home Page	8
2.1.2 Top Toolbar.....	8
2.1.3 Functions Toolbar	9
2.1.4 Actions Toolbar.....	9
2.1.5 Information Toolbar	9
2.2 Frequently Used Terms and Acronyms.....	9
3.0 System Overview.....	11
3.1 Navigation, Data Entry and Tool Tips	11
3.1.1 Using the Mouse.....	11
3.1.2 Using the Keyboard.....	11
4.0 Fee & Issuance Overview	12
4.1 Exercise 1—Login	12
4.2 Exercise 2—Accessing the Fee & Issuance Module	15
4.3 Exercise 3—Fee Dashboard.....	16
5.0 Fee Requests and Transactions	18
5.1 Exercise 4 – Using the Actionable Toolbar.....	20
5.2 Exercise 5– Creating a New Transaction	22
5.2.1 Upload Document	26
5.2.2 Scan Document	27
5.3 Exercise 6—Editing an Existing Transaction.....	30
5.4 Exercise 7—Creating Payment Information	31
5.4 Exercise 8—Search for a Record	35
5.4.1 Search Fee	37
5.4.1.1 Search Fee Checkbox	37
5.4.1.2 Search Fee Counter.....	37
5.4.1.2.1 Adjust Search Counter	38
5.4.2 View a Record.....	38
5.6 Exercise 9—Editing a Payment.....	38
5.7 Exercise 10—Deleting a Payment.....	40
5.8 Exercise 11—Re-Assigning a Payment.....	42
5.9 Exercise 12—Generating a Receipt	43
5.10 Exercise 13—Shipping Information Panel.....	44
5.11 Exercise 14—Editing a Shipment	48
5.12 Exercise 15—Deleting a Shipment	48
5.13 Exercise 16—Navigating to Search Transactions	49

5.14 Exercise 17—Performing a Search	50
6.0 Search In-Progress Records	52
6.1 Exercise 18—Search for In-Progress Record	52
6.2 Exercise 19—Notify Record Owner	53
7.0 Fee Module Tools	55
7.1 Exercise 20—Add/Update Starting Cash	55
7.2 Exercise 21—Printer Setup	55
7.2.2 User Printer History	56
7.2.3 List of Printers	57
7.2.4 Available Print Processes	58
7.2.5 Changing the Printer	59
7.3 Exercise 22—Paper Inventory Void	59
7.4 Exercise 23— Prepare Daily Close	61
7.5 Exercise 24—Close Drawer	62
7.5.1 Soft Close	62
7.5.2 Adjustment	64
7.5.3 Close Drawer	66
7.6 Exercise 25— Prepare Daily Close	66
7.7 Exercise 26— Make Bank Deposit	68
7.7.1 Print Bank Deposit Form	69
8.0 Reports	71
8.1 Exercise 27—Running a Report	71
9.0 Fee Configuration	72
9.1 Exercise 28—Configure a New Automated Email	72
9.2 Exercise 29—Edit an Existing Automated Email	73

Table of Figures

1. RIVERS City/Town Office Home Page	8
3. RIVERS City/Town Office Top Toolbar	9
4. RIVERS City/Town Office Function Toolbar	9
5. RIVERS City/Town Actions Toolbar	9
6. RIVERS City/Town Office Information Toolbar	9
7. RIVERS Splash Page	12
8. RIVERS Terms of Use	13
9. RIVERS Login	13
10. Select Location	14
11. Exit Application	15
12. RIVERS Fee Home Page	15
13. RIVERS Home Page	16
14. Fee Dashboard	17
15. Fee Registration Screen	18
16. Starting Cash Amount	18
17. Starting Cash Saved Successfully	19
18. New Request Data Entry	19

19. Action Toolbar.....	20
20. Requestor Information.....	21
21. Save Request.....	22
22. Request Saved Successfully.....	22
23. Add New.....	23
24. Transaction Information.....	23
25. Transaction Category.....	24
26. Transaction Type.....	24
27. Requestor Relationship.....	24
28. Transaction Reason.....	25
29. Quantity and Cost.....	25
30. Upload/Scan Document.....	26
31. Upload Document.....	26
32. File Uploaded Successfully.....	27
33. Scan Document.....	28
34. transaction Saved Successfully.....	29
35. Transaction Information.....	29
36. Fee Record Search.....	30
37. Transaction Information- Edit Mode.....	31
38. Payment Information.....	32
39. Add New Button.....	32
40. Payment Information Screen.....	33
41. Payment Type Drop-Down Menu.....	33
42. Payer(s) Information.....	34
43. Total/Done, Cancel, and Sub-Total Buttons.....	35
44. Record Saved Successfully.....	35
50. Fee Record Search Results.....	35
51. No Records Found for Given Search Criteria.....	36
52. Request Suspended Successfully Message.....	36
53. Printing Not Found Letter.....	36
54. Not Found Letter Added Successfully.....	36
55. Not Issued Button.....	37
56. Search Fee Checkbox.....	37
57. Additional Fee of Two Dollars for Searching.....	37
58. Search Count.....	37
59. Adjust Search Counter Button.....	38
60. Adjust Search Counter Screen.....	38
45. Edit Button.....	39
46. Payment Information- Edit Mode.....	39
47. Payment Updated Successfully.....	40
48. Delete Button.....	40
49. Delete Record?.....	40
50. Supervisor Override.....	41
51. Supervisor Override- Invalid Pin.....	41
52. record Deleted Successfully.....	42
53. Re-assign Button.....	42
54. Re-assign Payment Screen.....	43
55. Payment Re-Assigned Successfully.....	43
56. Receipt Button.....	44
57. Shipping Information.....	44
58. Shipping Information Screen.....	45
59. Shipping Information Section.....	46
60. Shipping Method.....	46
61. Enclose(s) Information.....	47
62. Enclose(s) Information Expanded.....	47
63. Save/Cancel Buttons.....	47
64. Shipment Saved Successfully.....	47
65. Edit Button.....	48

66. Delete Button.....	49
67. Delete this Record?.....	49
68. Fee Registration Screen.....	50
69. Search Transaction Screen.....	50
70. Search Transaction.....	51
71. Search Button.....	51
72. Search In Progress Vital Record.....	52
73. Search Information.....	53
74. No Records Found.....	53
75. Email Selected Record?.....	54
76. Request Sent to State.....	54
77. Update Starting Cash?.....	55
78. Supervisor Override.....	55
79. Printer Set Up.....	56
80. User Printer History.....	57
81. List of Printers.....	57
82. Print Tray.....	58
83. Move Print Processes.....	58
84. Assigned Print Processes.....	59
85. Paper Inventory Void.....	60
86. Paper Inventory.....	60
87. Prepare Daily Close.....	61
88. Prepare Daily Close?.....	62
89. Enter Pin.....	62
90. Closer Drawer.....	62
91. Soft Close Drawer.....	63
92. Soft Close Drawer?.....	63
93. Soft Close Drawer Successful.....	64
94. Drawer Adjustment?.....	64
95. Supervisor Override.....	64
96. Adjusted Amount.....	65
97. Adjustment Saved Successfully.....	65
98. Adjustment.....	65
99. Close Drawer?.....	66
100. Close Drawer Successfully.....	66
101. Prepare Daily Close.....	67
102. Prepare Daily Close?.....	67
103. Enter Pin.....	68
104. Bank Deposit Prepared Successfully.....	68
105. Make Bank Deposit.....	68
106. Save Bank Deposit?.....	69
107. Enter Pin.....	69
108. Bank Deposited Successfully.....	69
109. Print Bank Deposit Form?.....	70
110. Reprint Deposit Form.....	70
111. Example Report- Above Average Production Per Processor.....	71
112. Email Configuration Screen.....	72
113. Email Configuration Screen.....	73
114. Selected Email.....	73

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

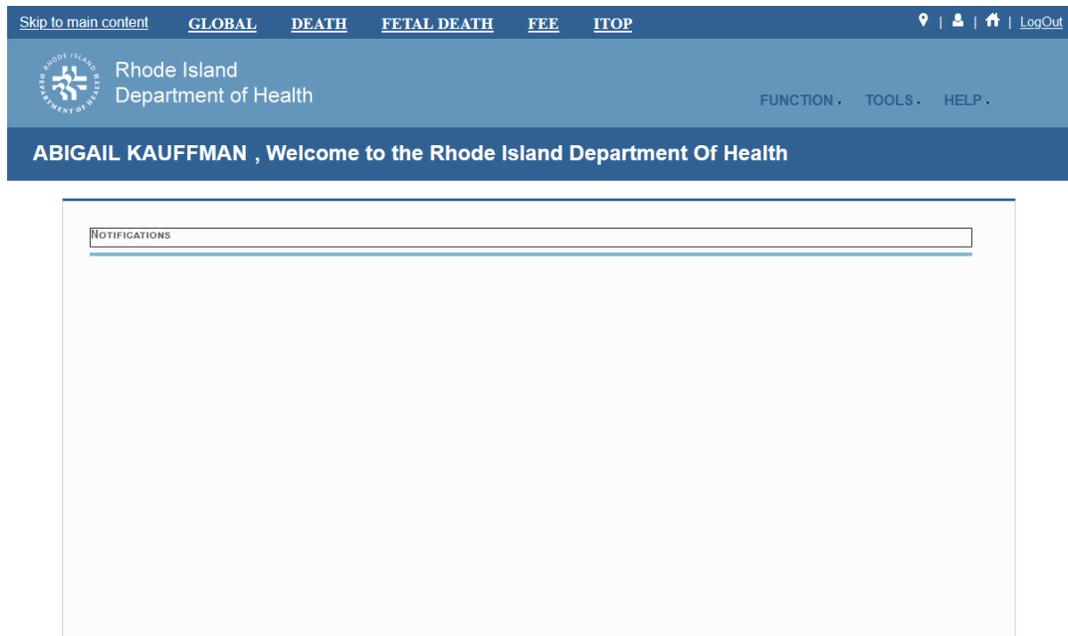
Throughout this training guide, there will be a wide variety of terms and phrases used in order to aid the City/Town user in the navigation and use of the RIVERS Fee module, and to help City/Town users better conceptualize the functionality of the System. Some of these terms and phrases will be repeated 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

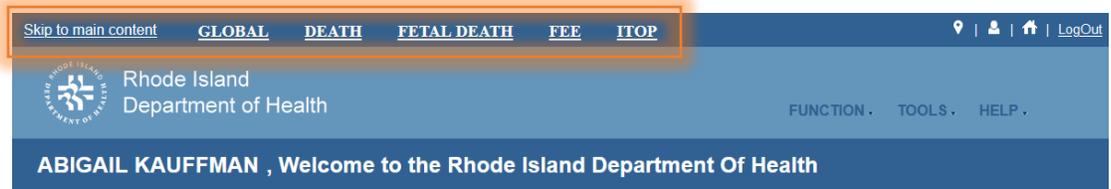
The home page is the primary page that is displayed following logging-in to the System and selecting one's location.



1. RIVERS City/Town Office Home Page

2.1.2 Top Toolbar

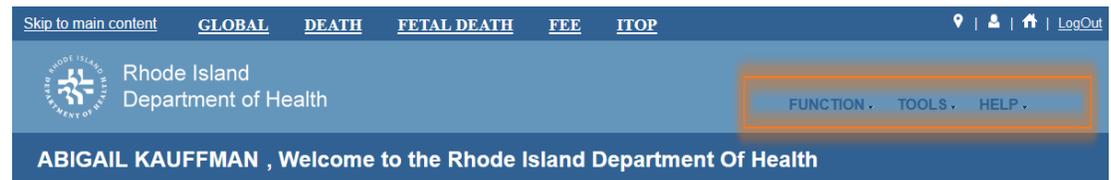
The top toolbar is the uppermost toolbar that lists the various modules deployed to the State of Rhode Island, and at the City/Town user's disposal.



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

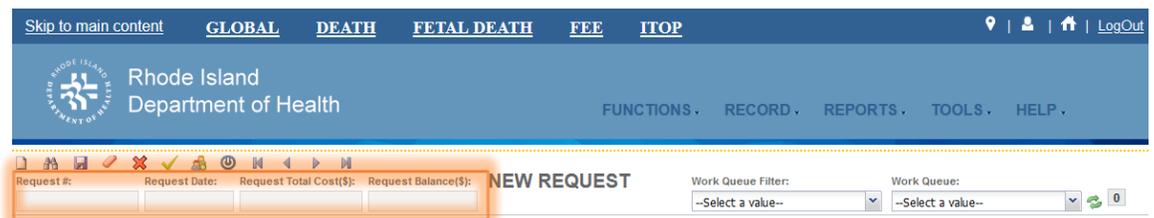
The **Actions Toolbar** is located directly under the **Functional Toolbar**. Actions include, but are not limited to: Creating New Records, Saving Records, and Deleting Records.



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 Rhode island .

Absolute Mandatory Field: A field that must be resolved or filled in with data in order for another action to occur. These fields are always marked with a red asterisk (*).

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://rivers.rihosting-by-genesis.com/RIUIV2/Welcome.htm> [rivers.rihosting-by-genesis.com]

The application splash page will load, as pictured below:

Rhode Island Department of Health

Welcome to the Rhode Island Department of Health

LOGIN TO RIVERS

[FORGOT PASSWORD?](#)

RIDOH Vital Records Office Hours
Monday 7:30 AM - 3:30 PM
Tuesday 7:30 AM - 3:30 PM
Wednesday 7:30 AM - 3:30 PM
Thursday 7:30 AM - 3:30 PM
Friday 7:30 AM - 3:30 PM

Contacting the Rhode Island Department of Health
Please visit RIDOH's [WEBSITE](#) for important updates, training guides, and informational materials.
Click the following link to reach us by email [REPORT RIVERS ISSUE\(S\)](#) or by phone at 1-866-694-0571 (at the prompt, press 1 for support).

NEW USER ENROLLMENT

6. RIVERS Splash Page

3. Click the **Login to RIVERS** button.
4. The **Terms of Use Screen** will load, as pictured below:



RIVERS Terms of Use

WARNING: THIS IS A RHODE ISLAND DEPARTMENT OF HEALTH INFORMATION RESOURCES SYSTEM THAT CONTAINS STATE AND/OR U.S. GOVERNMENT INFORMATION. BY USING THIS SYSTEM YOU ACKNOWLEDGE AND AGREE THAT YOU HAVE NO RIGHT OF PRIVACY IN CONNECTION WITH YOUR USE OF THE SYSTEM OR YOUR ACCESS TO THE INFORMATION CONTAINED WITHIN IT. BY ACCESSING AND USING THIS SYSTEM YOU ARE CONSENTING TO THE MONITORING OF YOUR USE OF THE SYSTEM, AND TO SECURITY ASSESSMENT AND AUDITING ACTIVITIES THAT MAY BE USED FOR LAW ENFORCEMENT OR OTHER LEGALLY PERMISSIBLE PURPOSES. ANY UNAUTHORIZED USE OR ACCESS, OR ANY UNAUTHORIZED ATTEMPTS TO USE OR ACCESS, THIS SYSTEM MAY SUBJECT YOU TO DISCIPLINARY ACTION, SANCTIONS, CIVIL PENALTIES, OR CRIMINAL PROSECUTION TO THE EXTENT PERMITTED UNDER APPLICABLE LAW.

Are you in agreement with above stated terms & conditions?

Yes

No

7. RIVERS Terms of Use

- Click the **Yes** button to confirm agreement with the terms of use.
 - Click the **No** button to be returned to the RIVERS splash page.
- The RIVERS login screen will display:



Login

LOGIN

User Name:

Password:

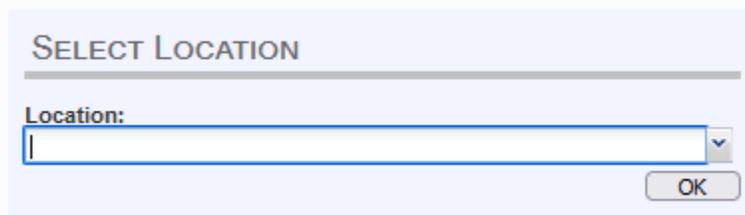
[Forgot Password?](#)

[Log In](#)

8. RIVERS Login

- Type in the Username provided to you to login - this is not case sensitive.

8. 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).
9. Type the password provided to you to login.
10. Press the **Tab** key on the keyboard to advance focus to the **Log In** command button.
11. 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.
12. 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.



9. Select Location

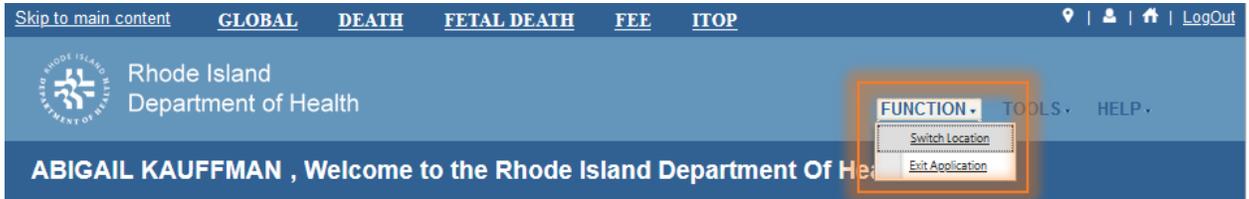
13. Note that the field on the screen has a set of arrows on the right side. This indicates that there is a dropdown list associated with this item.
 - Press the **Tab** key to set focus on the Select Location field. This will open the list.
 - Use the arrow keys to highlight a desired location followed 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.
14. 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.

15. 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

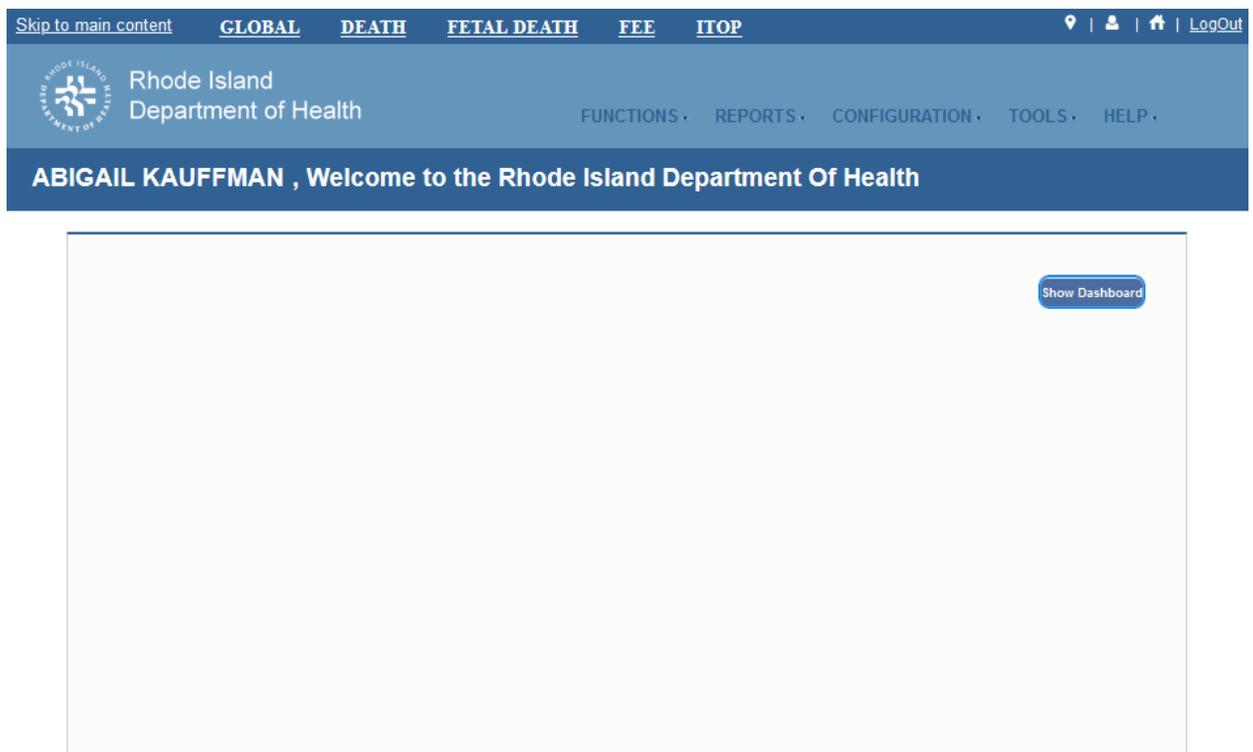
2. Select the **Fee** module by clicking on the appropriate tab, shown above. This will open the **Fee** module and present the City/Town user with the necessary toolbars and functionality in order to begin utilizing the various features of the module.

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**:



12. RIVERS Home Page

2. Click the **Show Dashboard** button (pictured above) to open the **Fee Dashboard**:

TRANSACTION INFORMATION				
Transaction Type	Total # Transactions	Avg Days Of Process*	Latest Transaction	Details
DEATH-DEATH CERTIFICATE	4	0	07/13/2021	

Page 1 of 1 | Displaying Records 1 - 1 of 1

13. Fee Dashboard

- 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.

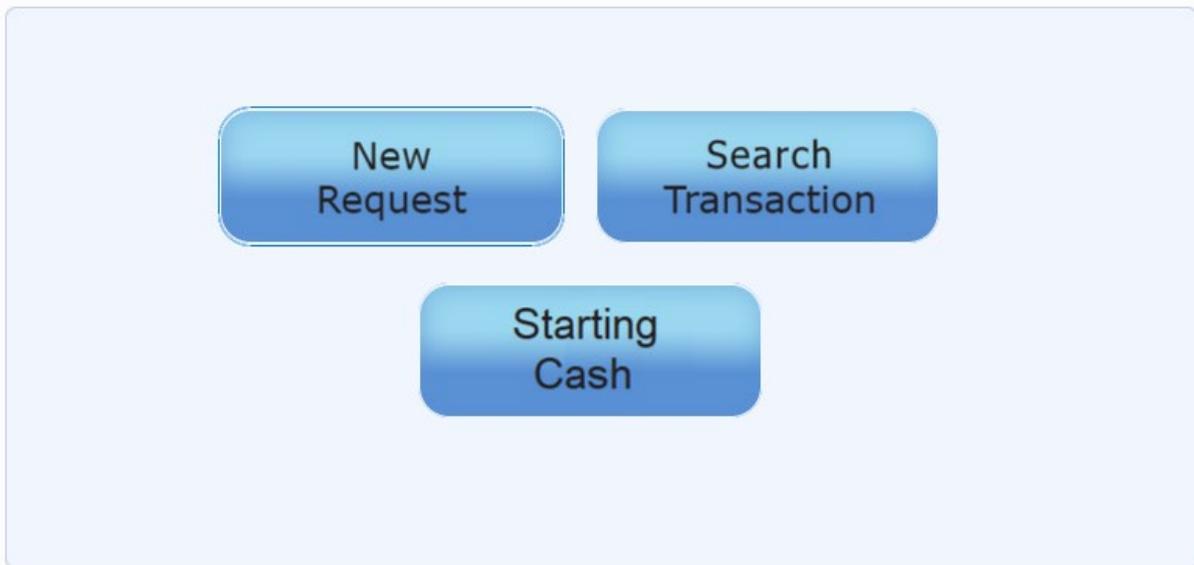
The Request Details screen provides details on individual transactions of a certain type that include the Requestor Name, Transaction Type, Date of Transaction Creation, Date of Transaction Completion and the user assigned to the transaction.

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.

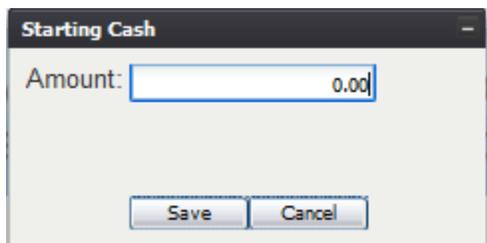
1. Click on the **Function** tab on the **Functional Toolbar**, and from the drop-down menu select **Fee Registration**.

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.



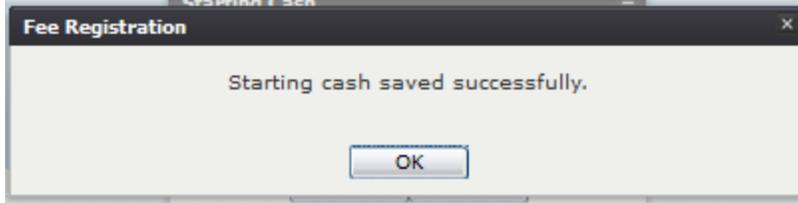
14. Fee Registration Screen

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:



15. Starting Cash Amount

4. Select **Save** and the following message will appear:



16. Starting Cash Saved Successfully

The screenshot shows the "NEW REQUEST" form in the Rhode Island Department of Health system. The form is organized into several sections:

- Requestor Information:** Includes fields for Request Type, Accounts Receivable, First Name, Middle Name, Last Name, Suffix, Address 1, Address 2, State/Country, City/Town, Zip, Zip Ext, Phone, Email, and a checkbox for "Requestor is Minor?".
- Identity Information:** Includes fields for Form ID #1, Other Form ID #1, Form ID #1 Info, Form ID #2, Other Form ID #2, and Form ID #2 Info. There is a "Show Document" button and a dropdown menu for TransactionType, UserName, and Department.
- Transaction Information:** A table with columns: Status, Transaction, Amount(\$), Adjusted Amount(\$), SPN, and Registrant's Name. Below the table are buttons: Add New, Edit, Delete, Void, Find Record, Print, Reenter DCN, and Add Letter.
- Payment Information:** A table with columns: Payment Date, Payment Type, Reference #, Amount(\$), Receipt #, Payer's Name, and Comment. Below the table are buttons: Add New, Edit, Delete, Re-assign, and Receipt.
- Shipping Information:** A table with columns: Shipping Method, Shipping Address, Endoses, Note, and Tracking N°. Below the table are buttons: Add New, Edit, and Delete.

At the top of the form, there are fields for Request #, Request Date, Request Total Cost(\$), and Request Balance(\$). There are also "Work Queue Filter" and "Work Queue" dropdown menus. A "Save Request" button is located at the bottom right of the form.

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**.



18. Action 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**

- Mail
- 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

Note: All fields marked with a red asterisk * are considered **absolute mandatory fields**. This indicates that the field must be resolved (filled-out) in order for the County user to proceed with the process.

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

REQUESTOR INFORMATION			
Request Type: *	--Select a value--	Accounts Receivable:	--Select a value--
First Name:	<input type="text"/>	Middle Name:	<input type="text"/>
Last Name: *	<input type="text"/>	Suffix:	--SELECT A VALUE--
No Return Address Provided:	<input type="checkbox"/>		
Address 1: *	<input type="text"/>	Address 2:	<input type="text"/>
State/Country: * (Click checkbox to filter foreign countries only)?	--Select a value--	City/Town:	<input type="text"/>
Zip:	<input type="text"/>	Zip Ext:	<input type="text"/>
Phone:	() - -	Email:	<input type="text"/>
Requestor is Minor?	<input type="checkbox"/>		
Priority Comment:	<input type="checkbox"/> <input type="text"/>		

19. Requestor Information

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.
 - Note:** When this box is checked **Address 1** is no longer an absolute mandatory field (*).
 - **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.

REQUESTOR INFORMATION

Request Type: * COUNTER Accounts Receivable: --Select a value--

First Name: TEST Middle Name:

Last Name: * TEST Suffix: --SELECT A VALUE--

No Return Address Provided:

Address 1: * 123 TEST LANE Address 2:

State/Country: * RHODE ISLAND City/Town: PROV

Zip: * 29874 Zip Ext:

Phone: () - - Email:

Requestor is Minor?

Priority Comment:

IDENTITY INFORMATION

Form ID #1: * DMV ID

Other Form ID #1:

Form ID #1 Info: * 123

Form ID #2: --Select a value--

Other Form ID #2:

Form ID #2 Info:

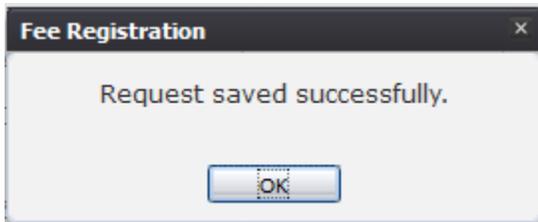
Show Document

TransactionType | UserName | Department

Save Request

20. Save Request

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



21. Request Saved Successfully

5.2 Exercise 5– Creating a New Transaction

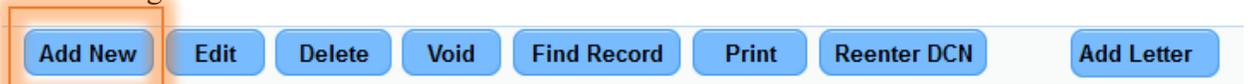
Once the record has been saved, City/Town users will have access to the final three sections of the **New Request Data Entry** screen. These final sections can only be completed after saving the request.

The final three sections of this screen are as follows:

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

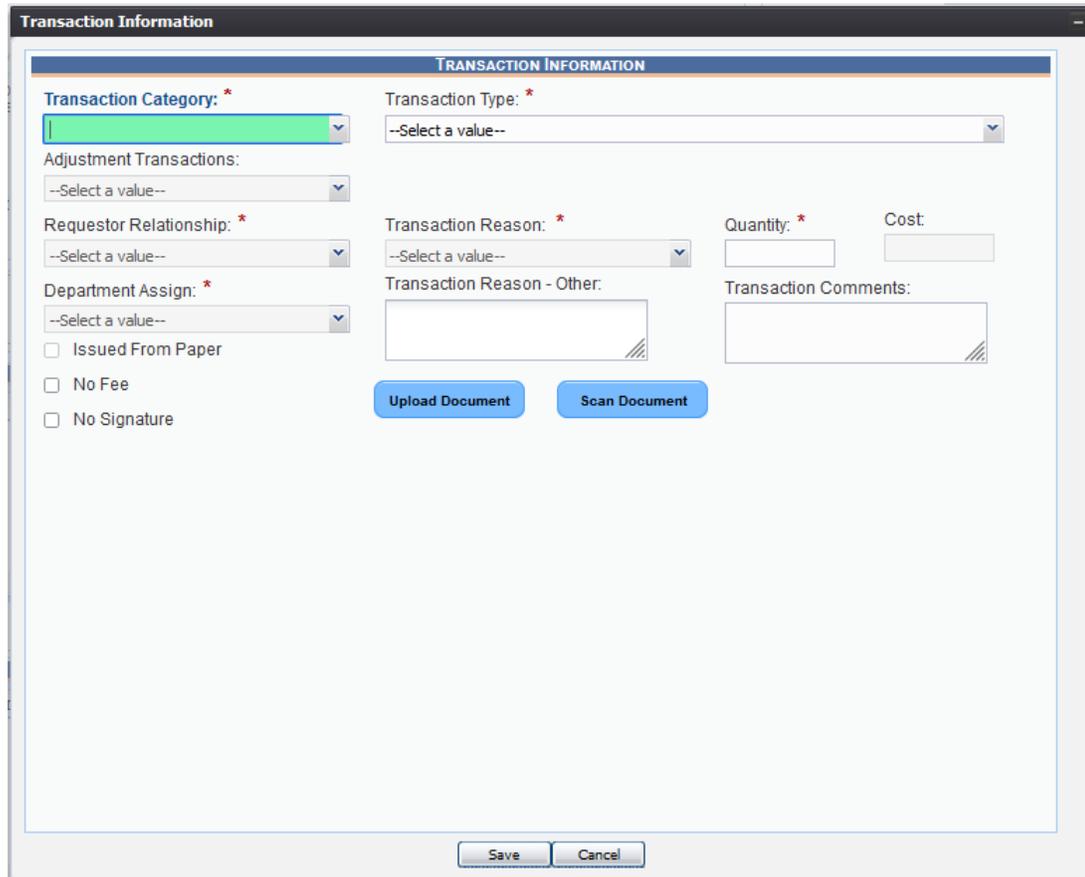
Each of these panels has separate and unique functions that enable City/Town users to add additional information to the request.

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



22. Add New

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

A screenshot of a software window titled 'Transaction Information'. The window has a header bar with the title 'TRANSACTION INFORMATION'. Below the header, there are several form fields. On the left side, there are three dropdown menus: 'Transaction Category: *' (with a green highlight), 'Adjustment Transactions: --Select a value--', and 'Department Assign: *'. In the middle, there are two more dropdown menus: 'Transaction Reason: *' and 'Transaction Reason - Other:'. On the right side, there are two input fields: 'Quantity: *' and 'Cost:'. Below these fields are two buttons: 'Upload Document' and 'Scan Document'. At the bottom of the window, there are two buttons: 'Save' and 'Cancel'.

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



A screenshot of a web form field labeled "Transaction Category: *". The dropdown menu is open, showing the selected option "--Select a value--" in a green box. Below it, the options "DEATH" and "FETAL DEATH" are visible.

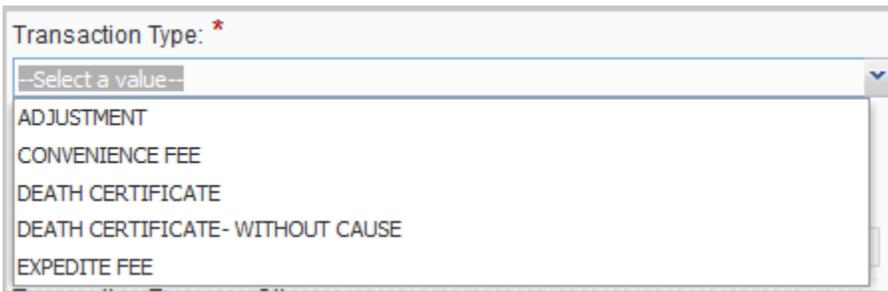
24. Transaction Category

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.



A screenshot of a web form field labeled "Transaction Type: *". The dropdown menu is open, showing the selected option "--Select a value--" in a grey box. Below it, the options "ADJUSTMENT", "CONVENIENCE FEE", "DEATH CERTIFICATE", "DEATH CERTIFICATE- WITHOUT CAUSE", and "EXPEDITE FEE" are visible.

25. 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.



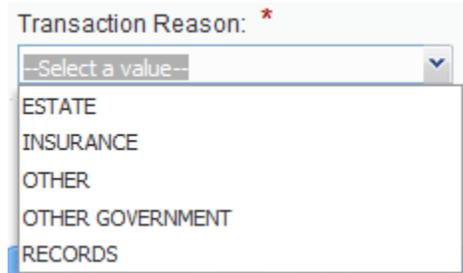
A screenshot of a web form field labeled "Requestor Relationship: *". The dropdown menu is open, showing the selected option "--Select a value--" in a grey box. Below it, the options "ADULT CHILD OF REGISTRANT", "ADULT SIBLING OF REGISTRANT", "FATHER OF REGISTRANT", "GENERAL PUBLIC", "GRANDPARENTS OF REGISTRANT", "LEGAL GUARDIAN OF REGISTRANT", "LEGAL REPRESENTATIVE", "MOTHER OF REGISTRANT", "SPOUSE OF REGISTRANT", "OTHER (DIRECT AND TANGIBLE INTEREST)", and "FUNERAL HOME OF RECORD" are visible.

26. 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.

A screenshot of a web form showing a dropdown menu for the 'Transaction Reason' field. The label 'Transaction Reason: *' is at the top. The dropdown menu is open, showing a list of options: 'ESTATE', 'INSURANCE', 'OTHER', 'OTHER GOVERNMENT', and 'RECORDS'. The 'RECORDS' option is currently selected and highlighted in blue.

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.

A screenshot of a web form showing two input fields. The 'Quantity' field is labeled 'Quantity: *' and contains the number '5'. The 'Cost' field is labeled 'Cost' and contains the value '94.00'. The 'Cost' field is grayed-out, indicating it is auto-populated.

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:

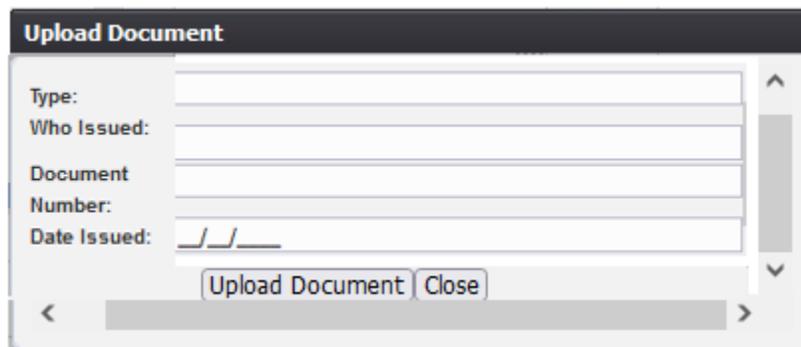
- **Upload Document:** This button will allow City/Town users to upload any associated documents to this specific transaction
- **Scan Document:** This button will allow City/Town users to use their scanning device to scan a document and attach it to this specific transaction



29. Upload/Scan Document

5.2.1 Upload Document

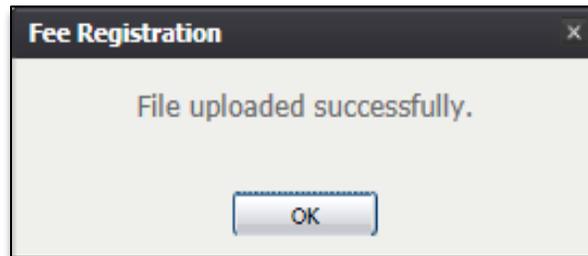
To upload a document to a particular record, press **Upload Document**, which will generate the following window:



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.



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:

The screenshot shows a web application window titled "Scan Documents". The interface contains the following elements:

- Document Type:** A text input field.
- Who Issued:** A text input field.
- Date Issued:** A date input field with slashes for separators.
- Date of Document:** A date input field with slashes for separators.
- Image Description:** A text input field.
- List of Scanners:** A dropdown menu with "--Select a value--" as the current selection.
- Scan Type:** A dropdown menu with "--Select a value--" as the current selection.
- Buttons:** Three buttons labeled "Scan Document", "Save Document", and "Close" are positioned below the dropdown menus.
- Image Preview:** A large rectangular area with a light gray grid pattern, intended for displaying the scanned document image.

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.

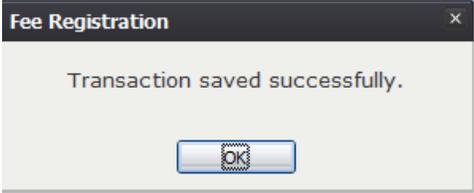
Once the document has been scanned a **City/Town User** will have the ability to view the document and download it from the Identity Information panel on the New Request Data Entry screen.

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:



33. transaction Saved Successfully

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

Status	Transaction	Amount(\$)	Adjusted Amount(\$)	SFN	Registrant's Name
SEARCHABLE	DEATH-DEATH CERTIFICATE	22.00	22.00		
SEARCHABLE	DEATH-DEATH CERTIFICATE	18.00	18.00		
SEARCHABLE	DEATH-DEATH CERTIFICATE	18.00	18.00		
SEARCHABLE	DEATH-DEATH CERTIFICATE	18.00	18.00		
SEARCHABLE	DEATH-DEATH CERTIFICATE	18.00	18.00		

Below the table is a toolbar with the following buttons: Add New, Edit, Delete, Void, Find Record, Print, Reenter DCN, and Add Letter.

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:

Fee Record Search

Wildcard Search
 Soundex Search
 Search Fee
 Search Fee Count: 0

DEATH REQUESTED REGISTRANT INFORMATION

Registrant First Name:
 Registrant Middle Name:
 Registrant Last Name:

Registrant Suffix: --SELECT A VALUE--
 Registrant Sex: --Select a value--
 Registrant Date of Death: * 08/02/2021

Registrant County of Death: --Select a value--
 Registrant City of Death: --Select a value--
 SFN:

Parent 1 First Name:
 Parent 1 Middle Name:
 Parent 1 Maiden Name:

Parent 2 First Name:
 Parent 2 Middle Name:
 Parent 2 Last Name:

Parent 2 Suffix: --Select a value--

SEARCH INFORMATION

SFN	First Name	Middle Name	Last Name	Suffix	Sex	County of Event	Event Date	Mother

35. Fee Record Search

Users are able to search and assign the record to the relevant transaction.

- **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:

Transaction Information

TRANSACTION INFORMATION

<p>Transaction Category: * <input type="text" value="DEATH"/></p> <p>Adjustment Transactions: <input type="text" value="--Select a value--"/></p> <p>Requestor Relationship: * <input type="text" value="GENERAL PUBLIC"/></p> <p>Department Assign: * <input type="text" value="SPECIAL ISSUANCE-CENTRAL PRINT ROC"/></p> <p><input type="checkbox"/> Issued From Paper</p> <p><input type="checkbox"/> No Fee</p> <p><input type="checkbox"/> No Signature</p>	<p>Transaction Type: * <input type="text" value="DEATH CERTIFICATE"/></p> <p>Transaction Reason: * <input type="text" value="INSURANCE"/></p> <p>Transaction Reason - Other: <input type="text"/></p>	<p>Quantity: * <input type="text" value="5"/></p> <p>Cost: <input type="text" value="94"/></p>
--	--	--

DEATH REQUESTED REGISTRANT INFORMATION

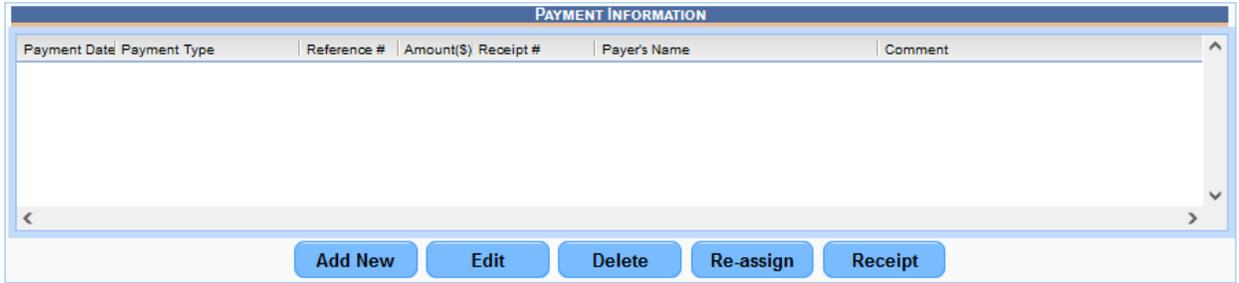
Registrant First Name: <input type="text"/>	Registrant Middle Name: <input type="text"/>	Registrant Last Name: <input type="text"/>
Registrant Suffix: <input type="text" value="--SELECT A VALUE--"/>	Registrant Sex: <input type="text" value="--Select a value--"/>	Registrant Date of Death: * <input type="text" value="08/02/2021"/>
Registrant County of Death: <input type="text" value="--Select a value--"/>	Registrant City of Death: <input type="text" value="--Select a value--"/>	SFN: <input type="text"/>
Parent 1 First Name: <input type="text"/>	Parent 1 Middle Name: <input type="text"/>	Parent 1 Maiden Name: <input type="text"/>
Parent 2 First Name: <input type="text"/>	Parent 2 Middle Name: <input type="text"/>	Parent 2 Last Name: <input type="text"/>
Parent 2 Suffix: <input type="text"/>		

36. Transaction Information- Edit Mode

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.

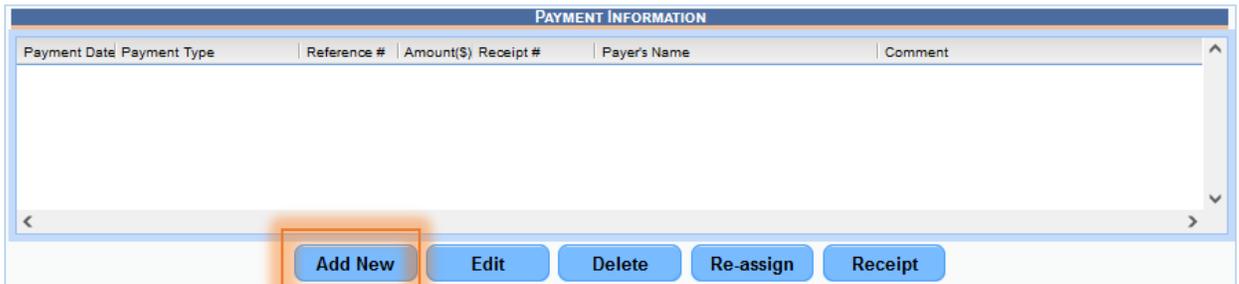


37. Payment Information

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.



38. Add New Button

This will generate the **Payment Information** window with the **Payment Information** panel, and the **Payer(s) Information** panel.

39. Payment Information Screen

2. In order to begin, first select the appropriate **Payment Type** from the drop-down menu. For this example, let's select **Cash**.

40. Payment Type Drop-Down Menu

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**.

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.

The screenshot shows a software interface for entering payment information. It is divided into three main sections: **PAYMENT INFORMATION**, **PAYMENT DETAILS**, and **PAYER(S) INFORMATION**. The **PAYER(S) INFORMATION** section is highlighted with an orange border. In this section, the checkbox **Payer(s) Same as a Requestor** is checked. The form fields are populated with test data: First Name: TEST, Middle Name: (empty), Last Name: TEST, Suffix: --SELECT A VALUE--, Address 1: 123 TEST LANE, Address 2: (empty), State/Country: RHODE ISLAND (selected), City/Town: PROV, Zip: 29874, and Email: (empty). The **PAYMENT INFORMATION** section includes fields for Payment Type (green dropdown), Payment Date, Amount Received, Reference #, and Reference Date. The **PAYMENT DETAILS** section shows Invoice Total: 94.00, Total Amount Tendered: 0.00, and Balance Due: 94.00. At the bottom of the form are buttons for **Total/Done**, **Cancel**, and **Sub-Total**.

41. Payer(s) Information

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

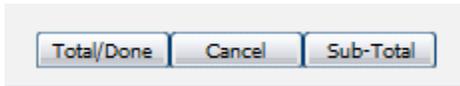
Within this panel, City/Town users have two options: to either enter all of the information manually, or to select the **Payer(s) Same as a Requestor** check box at the top left corner of the panel.

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.

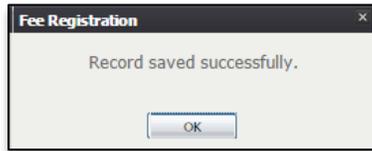
4. For this example, let's select the checkbox mentioned above. Next, enter all known payer information.
5. Once the information has been generated, click on the **Total/Done** button at the bottom of the screen. Conversely, should a City/Town user wish to cancel the payment, City/Town users must select 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:



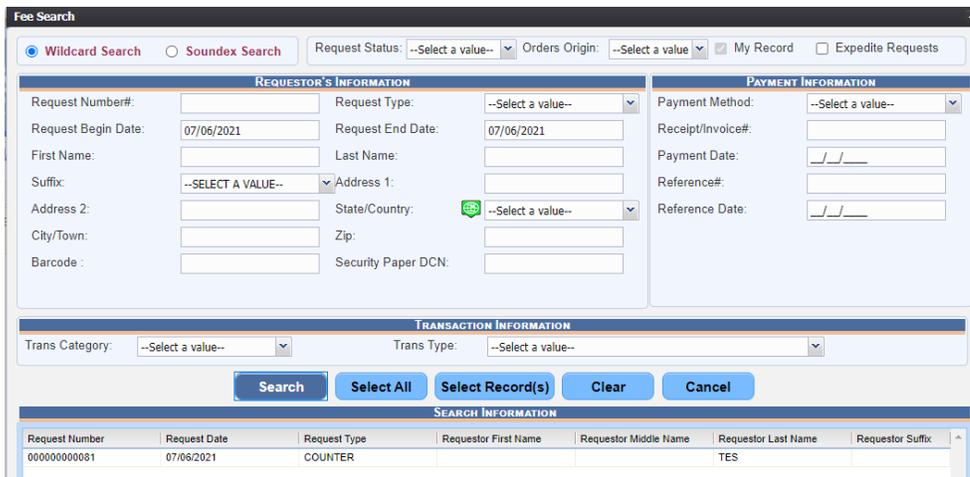
43. Record Saved Successfully

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

5.4 Exercise 8—Search for a Record

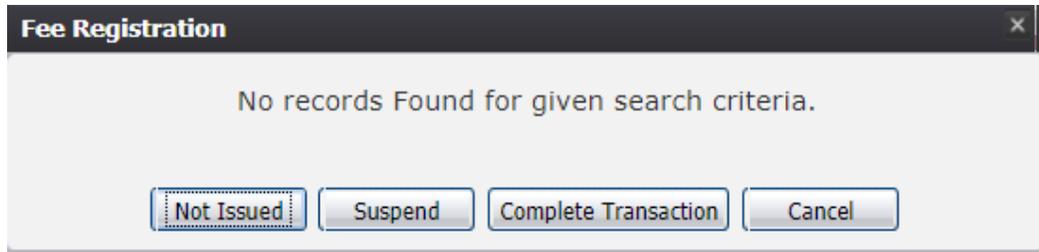
To search for a record on the **Fee Record Search** screen:

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):



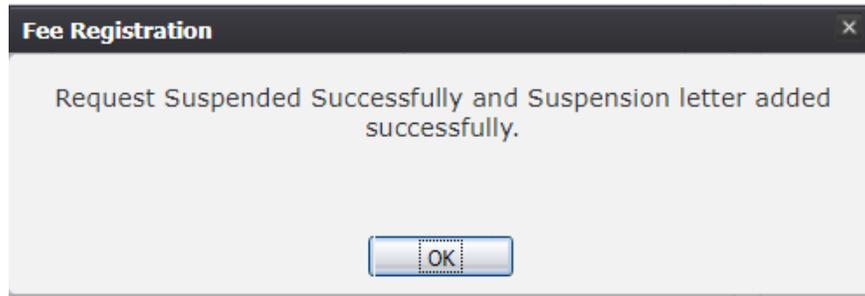
44. Fee Record Search Results

- a. If a matching record is not found, the following message will be displayed:



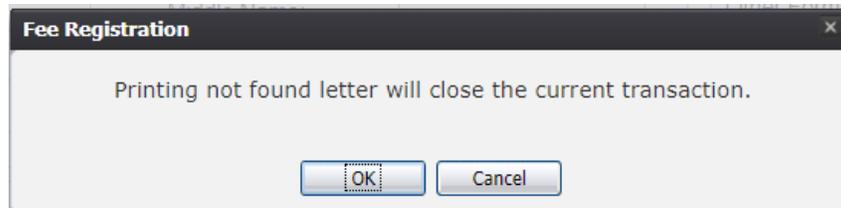
45. No Records Found for Given Search Criteria

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



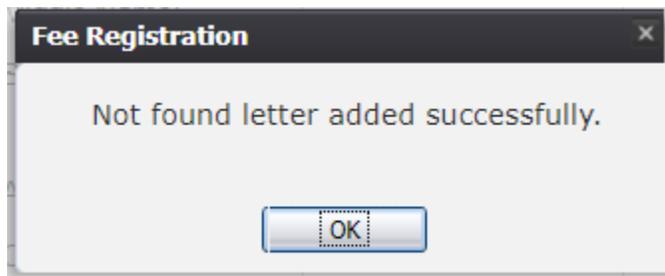
46. Request Suspended Successfully Message

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



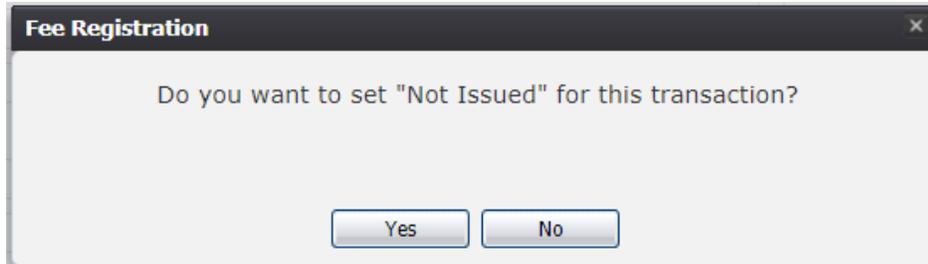
47. Printing Not Found Letter

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



48. Not Found Letter Added Successfully

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



49. Not Issued Button

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.

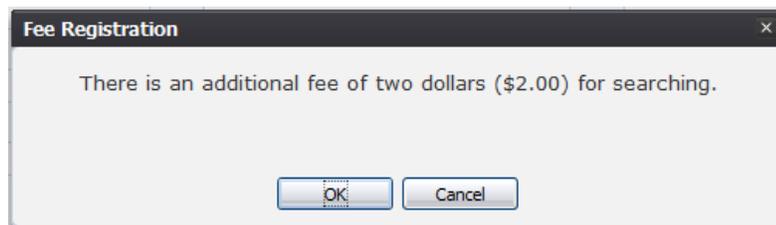
5.4.1.1 Search Fee Checkbox

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



50. Search Fee Checkbox

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



51. Additional Fee of Two Dollars for Searching

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

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:



52. Search Count

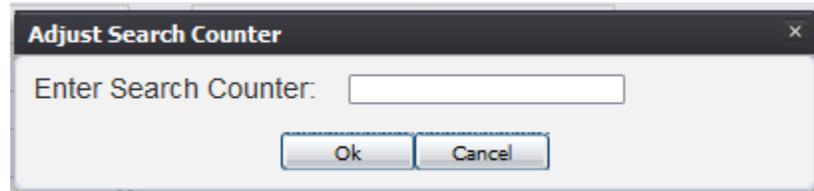
5.4.1.2.1 Adjust Search Counter

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



53. Adjust Search Counter Button

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



54. Adjust Search Counter Screen

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**.

PAYMENT INFORMATION						
Payment Date	Payment Type	Reference #	Amount(\$)	Receipt #	Payer's Name	Comment
08/02/2021	CASH		50.00	00000000000189	TEST TEST	

55. Edit Button

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

PAYMENT INFORMATION

Payment Type: *	Payment Date:	Amount Received: *
CASH	08/02/2021	50.00
Reference #:	Reference Date:	
	__/__/__	

PAYMENT DETAILS

Invoice Total:	Total Amount Tendered:	Balance Due:
94.00	50.00	44.00

PAYER(S) INFORMATION

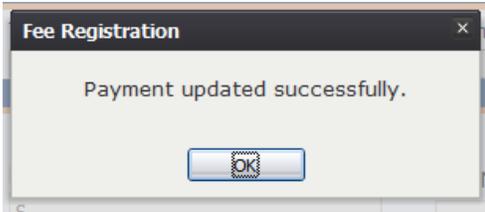
Payer(s) Same as a Requestor

First Name:	Middle Name:	Last Name: *
TEST		TEST
Suffix:	Address 1:	Address 2:
--SELECT A VALUE--	123 TEST LANE	
State/Country:(Click checkbox to filter foreign countries only)? *	City/Town:	Zip:
<input type="checkbox"/> RHODE ISLAND	PROV	29874
Zip Ext:	Email:	Phone:
		() - -

56. Payment Information- Edit Mode

- 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:



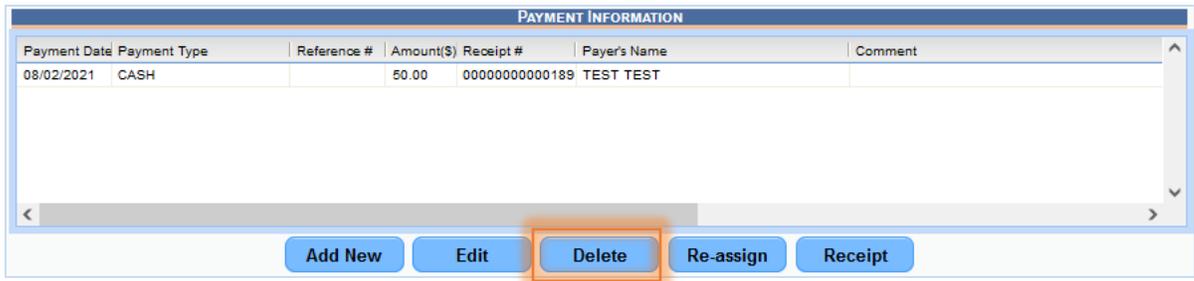
57. Payment Updated Successfully

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

5.7 Exercise 10—Deleting a Payment

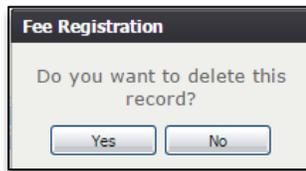
This exercise will go through the process of deleting a payment from the System:

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



58. Delete Button

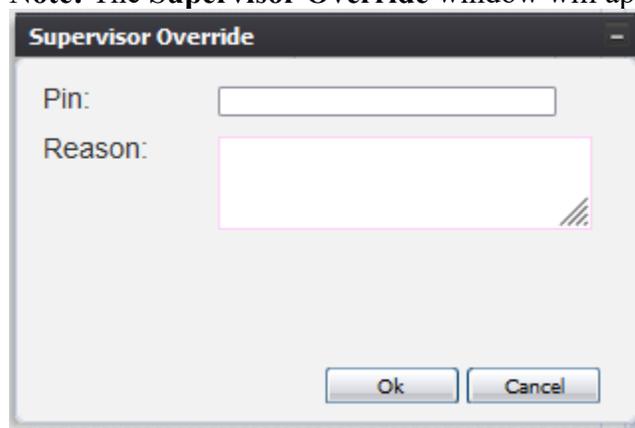
Clicking **Delete** will ask for confirmation of the deletion.



59. Delete Record?

2. Select **Yes** from the options

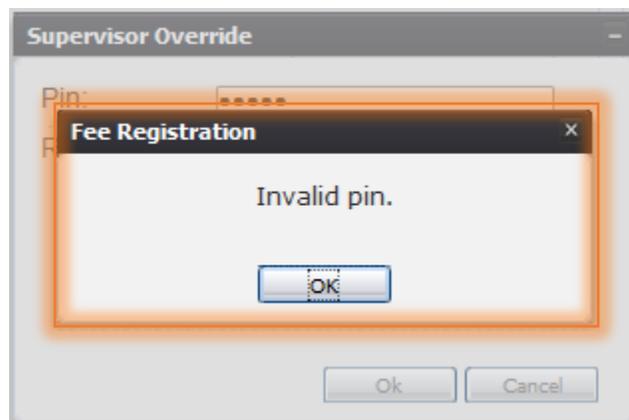
Note: The **Supervisor Override** window will appear



60. Supervisor Override

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.

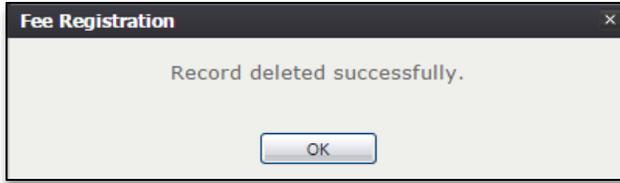
If the supervisor incorrectly enters his/her PIN into the System, the following rejection message will appear, and return the City/Town user to the previous window to try and re-enter the correct information:



61. Supervisor Override- Invalid Pin

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:

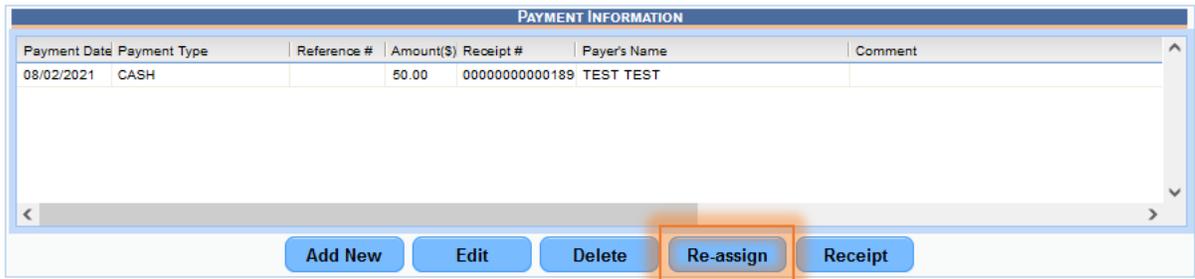


62. record Deleted Successfully

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

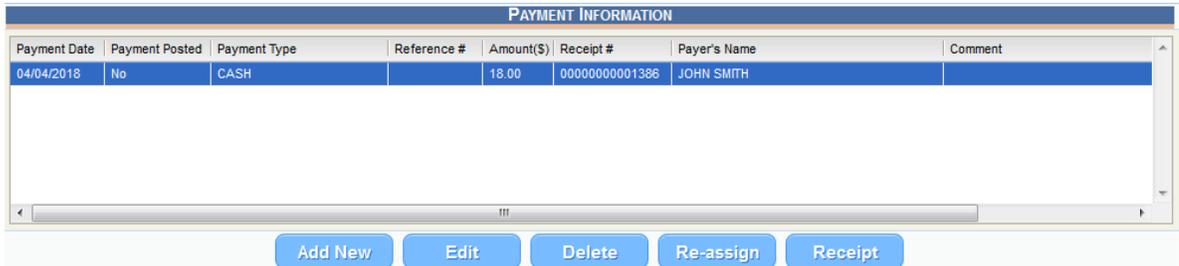
5.8 Exercise 11—Re-Assigning a Payment

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.

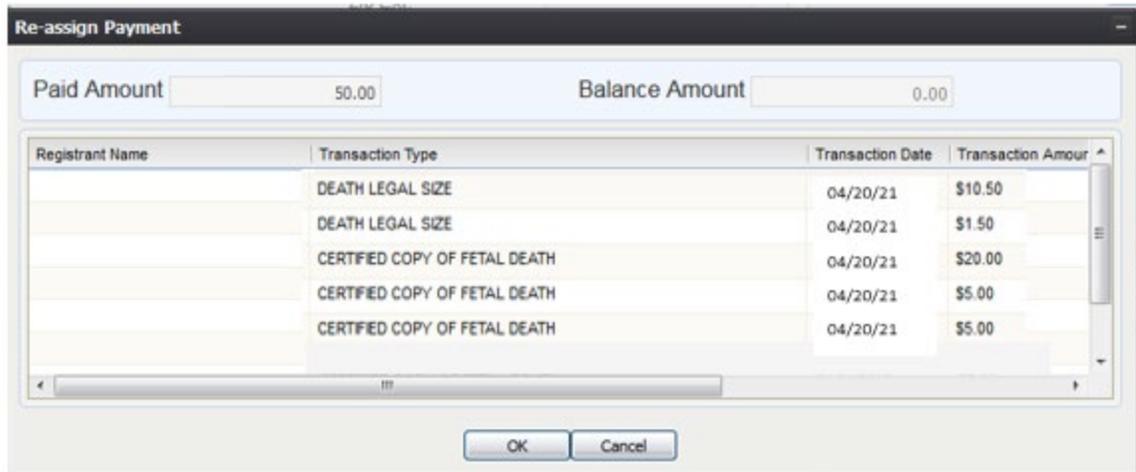


63. Re-assign Button

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.



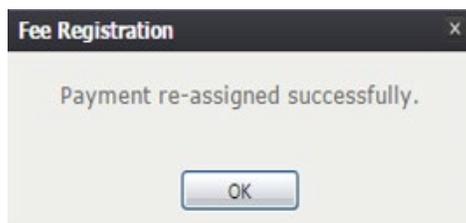
64. Re-assign Payment Screen

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**.

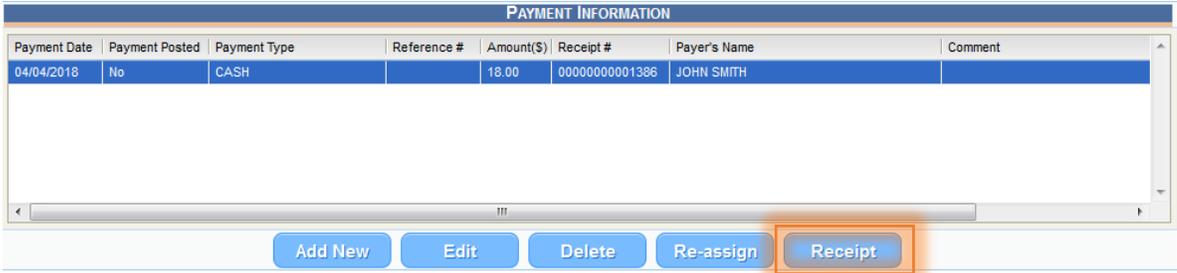
If the payment was re-assigned successfully, the following message will appear:



65. Payment Re-Assigned Successfully

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.

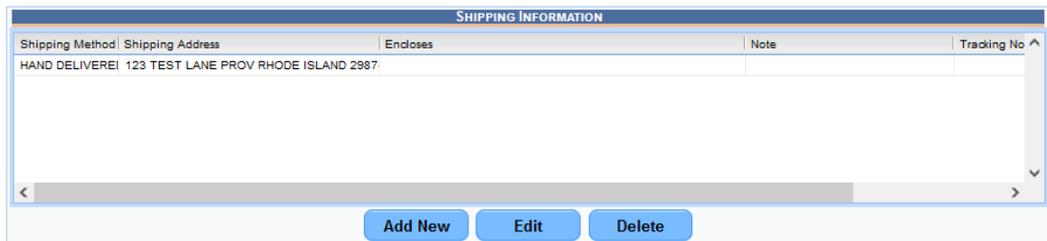
Note: Receipts can be printed even after the record has been completed.

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.



67. Shipping Information

This will generate the **Shipping Information** window:

Shipping Information

SHIPPING INFORMATION

Shipping Method: *
 Address Same as Requestor

First Name: TEST
 Middle Name:
 Last Name: * TEST

Suffix: --SELECT A VALUE--
 Address 1: 123 TEST LANE
 Address 2:

State/Country: (Click checkbox to filter foreign countries only?)
 RHODE ISLAND
 City/Town: PROV
 Zip: 29874

Zip Ext:
 Email:
 Phone: () - -

Shipping Note:
 Tracking Number:
 Tracking Date: / /

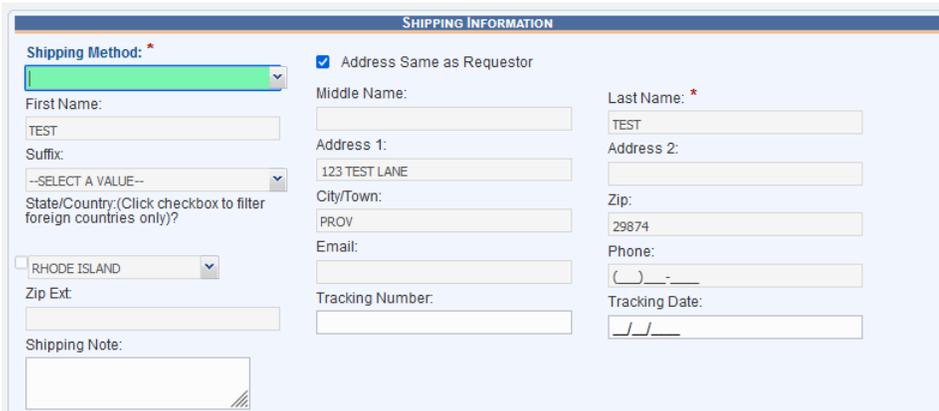
ENCLOSE(S) INFORMATION

Transactions: FETAL DEATH, DEATH
 Enclosed:

Save Cancel

68. Shipping Information Screen

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.



69. Shipping Information Section

In addition to the fields, there is an **Address Same as Requestor** check box to the right of **Shipping Method**. When checked all of the fields within the window will auto-populate.

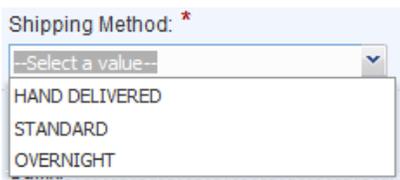
If the shipping address is the same as the requestor’s address, check the box beside **Address Same as Requestor**, and all the information will be pre-populated and auto-filled, as seen in the preceding screenshot.

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**.



70. Shipping Method

Once the shipping information has been confirmed, a **Shipping Note**, **Tracking Number**, and **Tracking Date** can be added, if needed. Users will have the ability to save the shipment and return to the shipment at a later time to edit.

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.



71. Enclose(s) Information

Within this panel are two sub-panels: **Transactions** and **Enclosed**.

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.



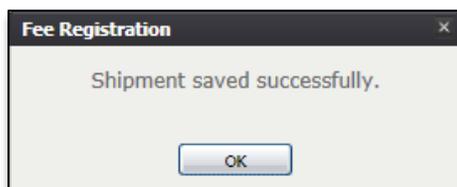
72. Enclose(s) Information Expanded

Once all of the documents have been added for the shipment, click **Save**. To cancel the process, click **Cancel**.



73. Save/Cancel Buttons

If the shipment information saves successfully, the following message will appear:



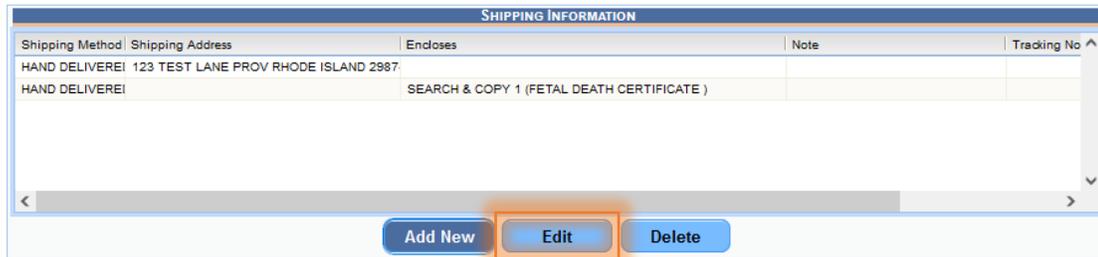
74. Shipment Saved Successfully

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



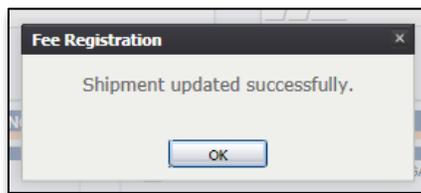
75. Edit Button

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.

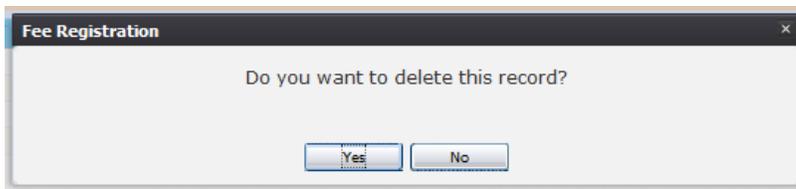
5.12 Exercise 15—Deleting a Shipment

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?

If the City/Town user selects **Yes**, the record will be deleted. If the City/Town user selects **No**, they will effectively cancel the delete request and the record will remain.

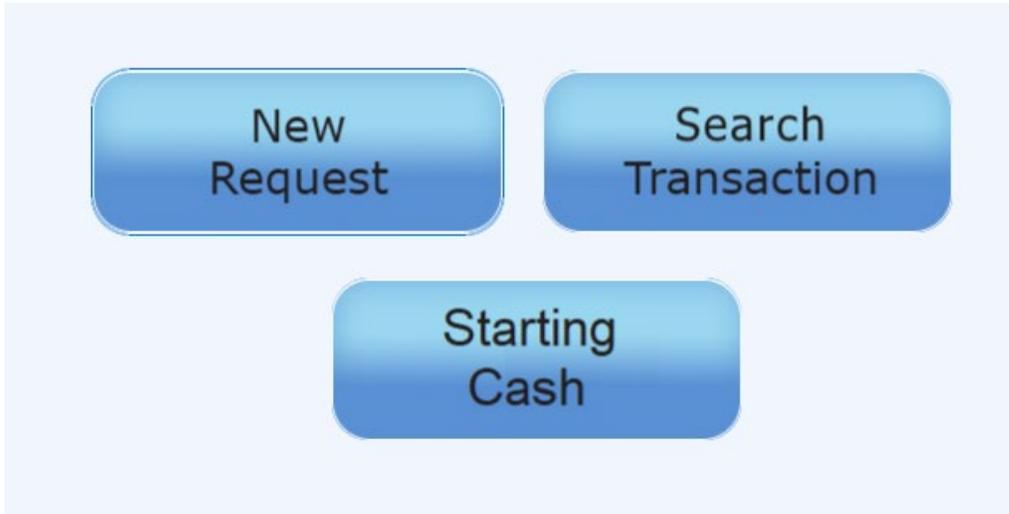
3. Select **Yes**

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.

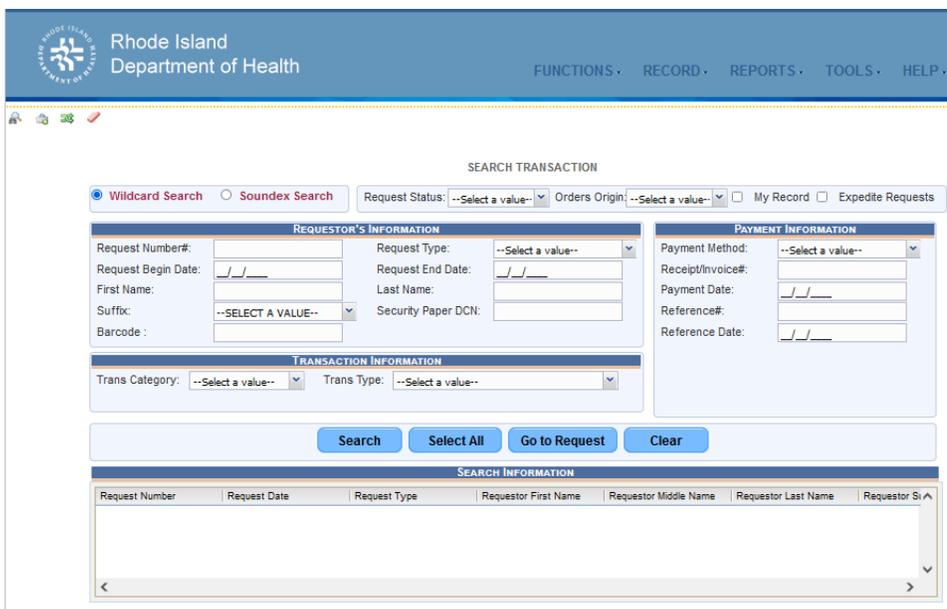
1. In order to begin, navigate to the RIVERS Fee application, then **Fee Registration**.

Once **Fee Registration** is selected, the following page will generate:



78. Fee Registration Screen

2. Select **Search Transactions**. The following page will load:



79. Search Transaction Screen

Or, from within the **Fee** module, go to **Functions** → **Search Transactions**.

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:

SEARCH TRANSACTION

Wildcard Search
 Soundex Search
 Request Status: --Select a value--
 Orders Origin: --Select a value--
 My Record
 Expedite Requests

REQUESTOR'S INFORMATION		PAYMENT INFORMATION	
Request Number#:	100	Request Type:	--Select a value--
Request Begin Date:	__/__/__	Request End Date:	__/__/__
First Name:		Last Name:	
Suffix:	--SELECT A VALUE--	Security Paper DCN:	
Barcode :			
		Payment Method:	--Select a value--
		Receipt/Invoice#:	
		Payment Date:	__/__/__
		Reference#:	
		Reference Date:	__/__/__
TRANSACTION INFORMATION			
Trans Category:	--Select a value--	Trans Type:	--Select a value--

80. Search Transaction

Note: The more information entered into the appropriate search fields will aid in narrowing the search results for the City/Town user.

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.



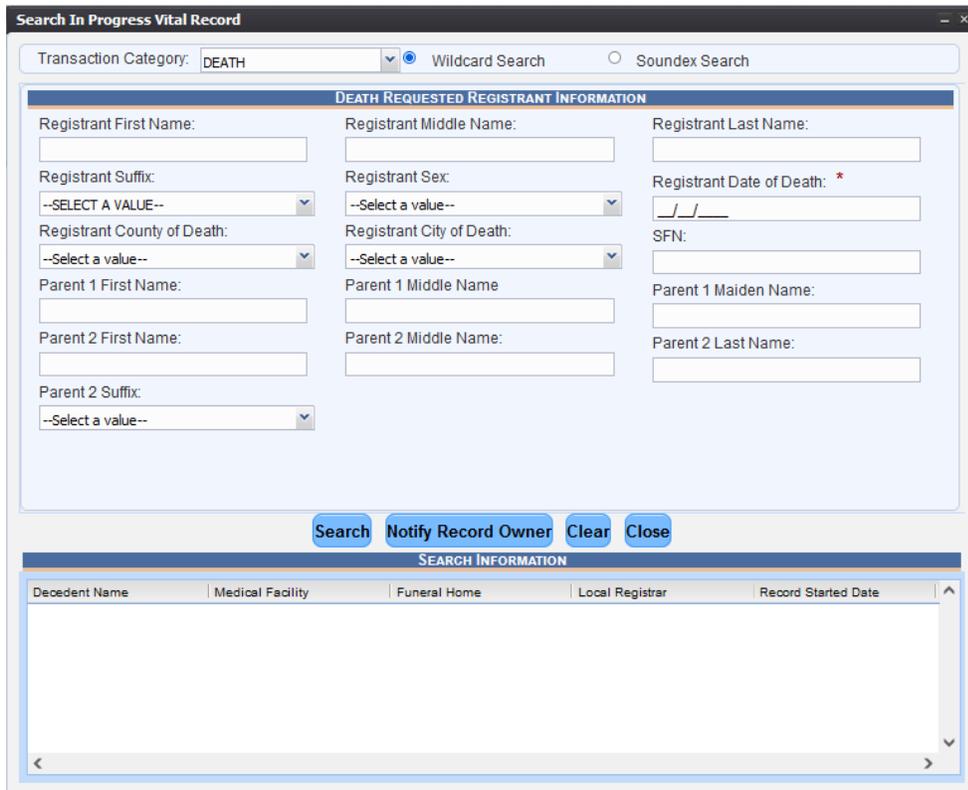
81. Search Button

Clicking on the **Search** button will generate the results in the **Search Information** panel.

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.



82. Search In Progress Vital Record

6.1 Exercise 18—Search for In-Progress Record

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.

Search In Progress Vital Record

Transaction Category: DEATH Wildcard Search Soundex Search

DEATH REQUESTED REGISTRANT INFORMATION

Registrant First Name: Registrant Middle Name: Registrant Last Name:

Registrant Suffix: --SELECT A VALUE-- Registrant Sex: MALE Registrant Date of Death: * 00/00/2021

Registrant County of Death: --Select a value-- Registrant City of Death: --Select a value-- SFN:

Parent 1 First Name: Parent 1 Middle Name: Parent 1 Maiden Name:

Parent 2 First Name: Parent 2 Middle Name: Parent 2 Last Name:

Parent 2 Suffix: --Select a value--

Search **Notify Record Owner** **Clear** **Close**

SEARCH INFORMATION

Decedent Name	Medical Facility	Funeral Home	Local Registrar	Record Started Date
A A KUN				03/15/2021
A A DOP				03/15/2021
A A WUN				03/15/2021
A B GOOCH	LIFESPAN PHYSICIAN GROUP F	GENESIS FUNERAL HOME		03/15/2021
FIRST FIRST				03/16/2021
MED MED MED	LIFESPAN PHYSICIAN GROUP F			03/16/2021
A A I AMB				03/17/2021

83. Search Information

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

Fee Registration

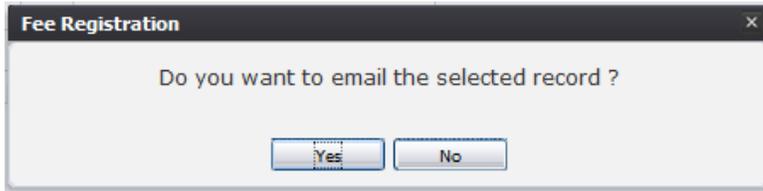
No records found for given search criteria.

84. No Records Found

6.2 Exercise 19—Notify Record Owner

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?

Click **Yes** to continue with the notification to the record owner. Clicking **No** will cancel the notification and return the user to the previous screen.

If Yes is selected, the following message will appear:



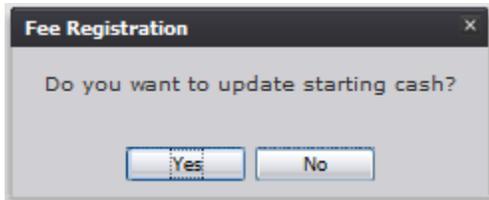
86. Request Sent to State

7.0 Fee Module Tools

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

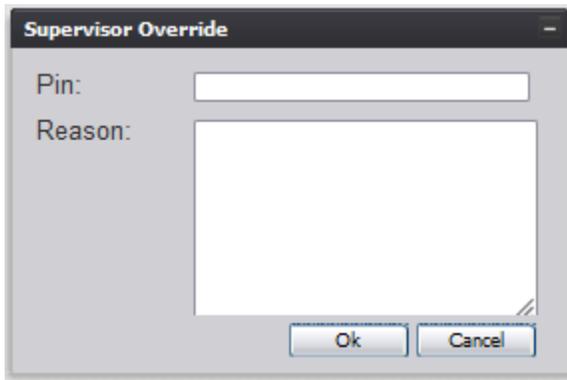
7.1 Exercise 20—Add/Update Starting Cash

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



87. Update Starting Cash?

A supervisor will have to enter in their pin and a reason:



88. Supervisor Override

The supervisor will then have to enter in the starting cash amount.

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**.

PRINTER SETUP

GEN PRINT PLUGIN: 2.0.9

CONNECTION: ACTIVE

USER PRINTER HISTORY



List of Printers:

--Select a value--

Print Tray:

--Select a value--

Available Print Processes:

-  ADJUSTMENT DIRECT PAYMENT FORM LETTER
-  AR PAYMENT RECEIPT
-  COURTESY LETTER
-  DEATH AMENDMENT- WITHIN 1 YEAR
-  DEATH CERTIFICATE
-  DEATH CERTIFICATE- WITHOUT CAUSE
-  DEATH CORRECTION
-  DEATH LEGAL AMENDMENT
-  DEATH LEGAL AMENDMENT BY COURT ORDER
-  DEATH VERIFICATION OF DEATH
-  FETAL DEATH AMENDMENT- WITHIN 1 YEAR
-  FETAL DEATH CERTIFICATE
-  FETAL DEATH CERTIFICATE OF BIRTH RESULTING IN A STILLBIRTH
-  FETAL DEATH CORRECTION
-  FETAL DEATH DEMOGRAPHIC AMENDMENT
-  FETAL DEATH MEDICAL AMENDMENT
-  FETAL DEATH STATISTICAL CORRECTION
-  FETAL DEATH VERIFICATION OF FETAL DEATH
-  INSUFFICIENT FUND LETTER
-  NO RECORD FOUND LETTER

Assigned Print Processes:

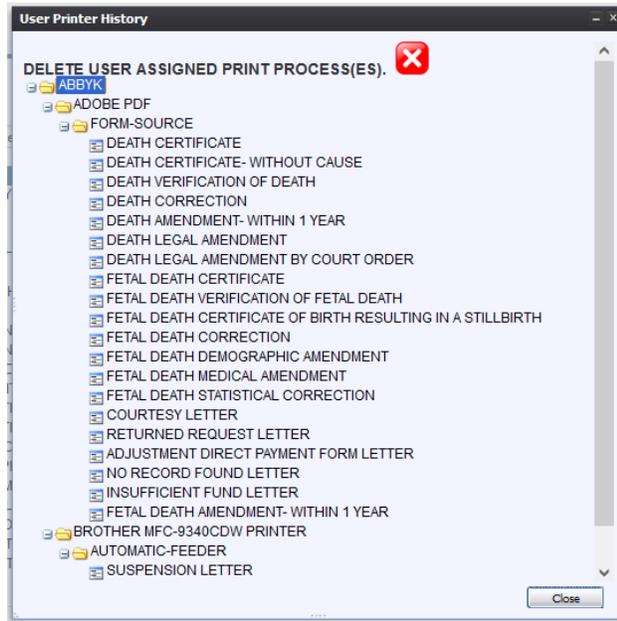
-  ADJUSTMENT DIRECT PAYMENT FORM LETTER
-  AR PAYMENT RECEIPT
-  COURTESY LETTER
-  DEATH AMENDMENT- WITHIN 1 YEAR
-  DEATH CERTIFICATE
-  DEATH CERTIFICATE- WITHOUT CAUSE
-  DEATH CORRECTION
-  DEATH LEGAL AMENDMENT
-  DEATH LEGAL AMENDMENT BY COURT ORDER
-  DEATH VERIFICATION OF DEATH
-  FETAL DEATH AMENDMENT- WITHIN 1 YEAR
-  FETAL DEATH CERTIFICATE
-  FETAL DEATH CERTIFICATE OF BIRTH RESULTING IN A STILLBIRTH
-  FETAL DEATH CORRECTION
-  FETAL DEATH DEMOGRAPHIC AMENDMENT
-  FETAL DEATH MEDICAL AMENDMENT
-  FETAL DEATH STATISTICAL CORRECTION
-  FETAL DEATH VERIFICATION OF FETAL DEATH
-  INSUFFICIENT FUND LETTER
-  NO RECORD FOUND LETTER

89. Printer Set Up

The **Printer Setup** screen is divided into two panels, with two drop-down menus, a list of **Action** icons, and one **User Printer History** icon.

7.2.2 User Printer History

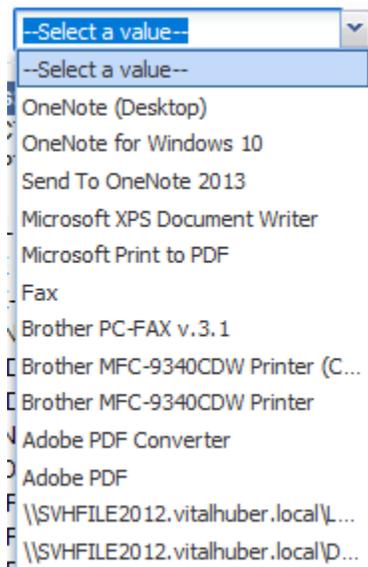
Selecting the **User Printer History** icon will generate a window that shows users of all of the previous print-related options selected.



90. User Printer History

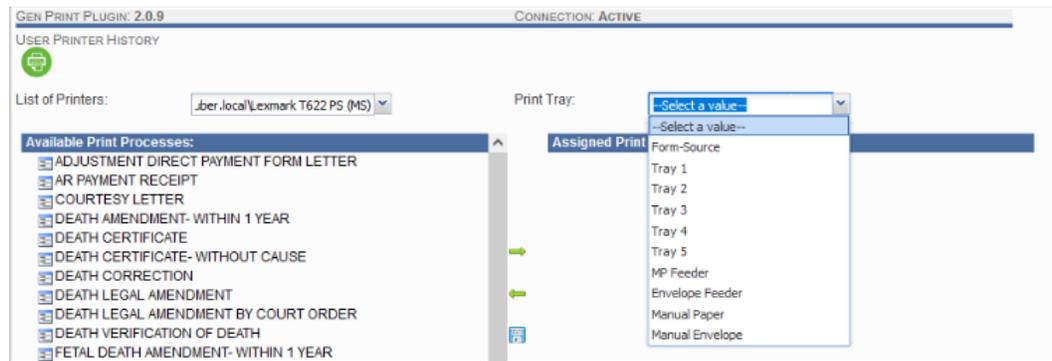
7.2.3 List of Printers

The **List of Printers** drop-down menu displays a list of all of the printers that the computer recognizes as a print destination.



91. List of Printers

Once a printer is selected from the **List of Printers** drop-down menu, the **Print Tray** drop-down menu will populate with available tray options.

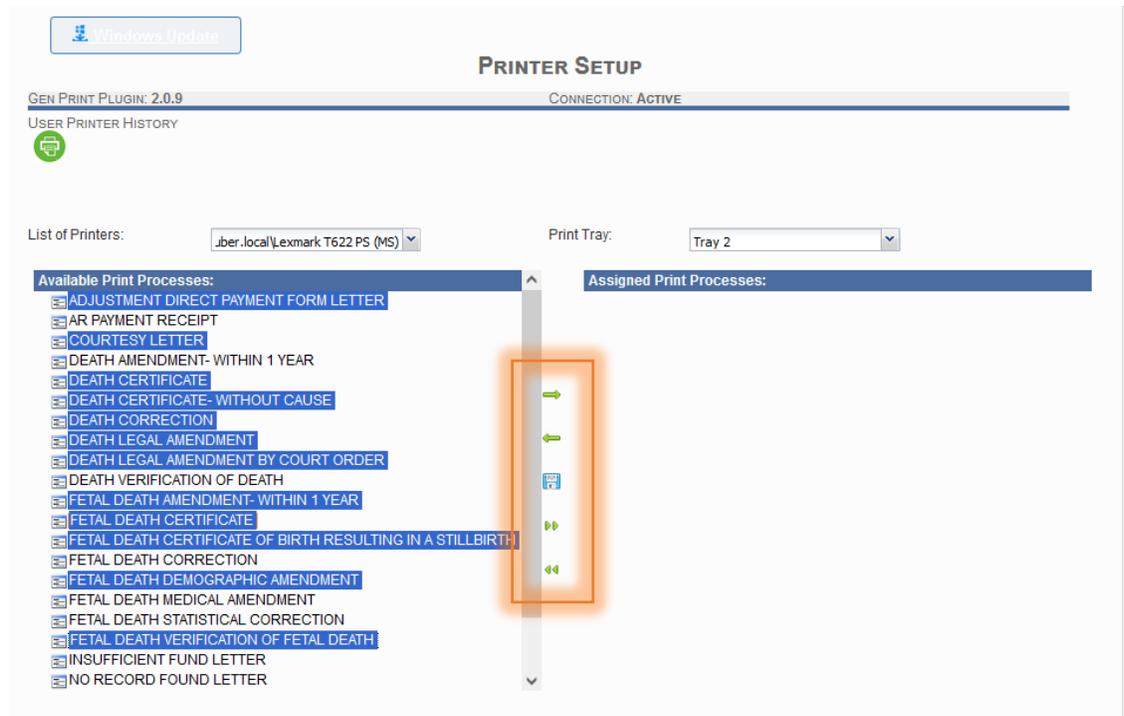


92. Print Tray

7.2.4 Available Print Processes

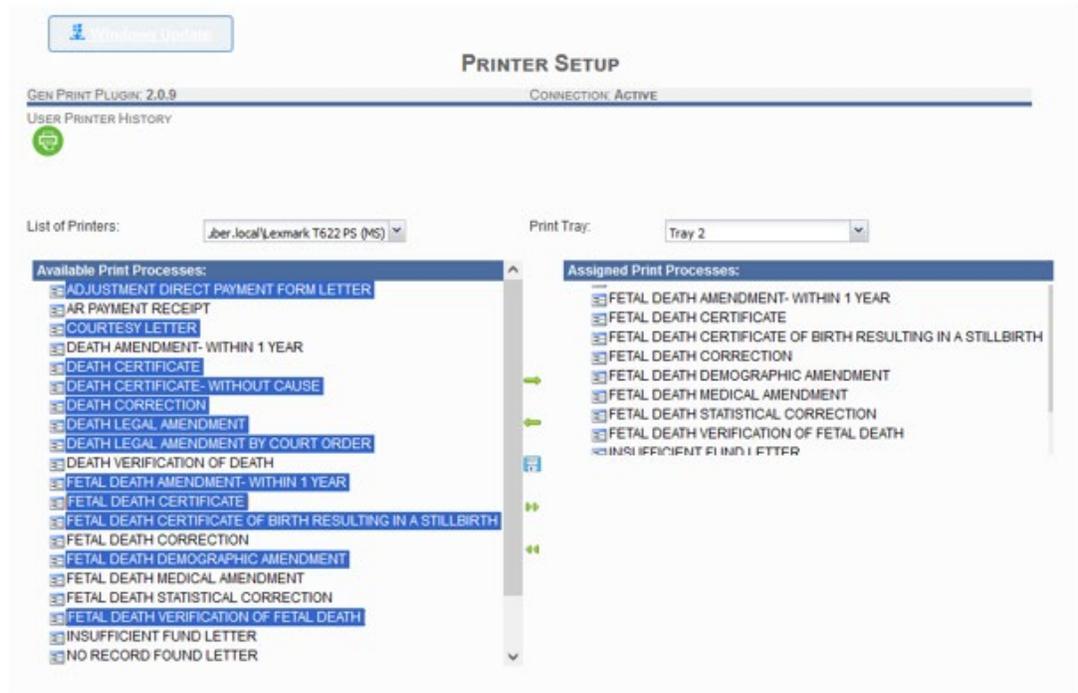
The **Available Print Processes** panel lists the processes that can be performed from the selected printer.

Select a print process from the **Available Print Processes** panel and then press the **Right Arrow** key.



93. Move Print Processes

The selected processes will then appear in the **Assigned Print Processes** panel.



94. Assigned Print Processes

To remove a process, highlight the process in the **Assigned Print Processes** panel and then press the **Remove** icon.

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

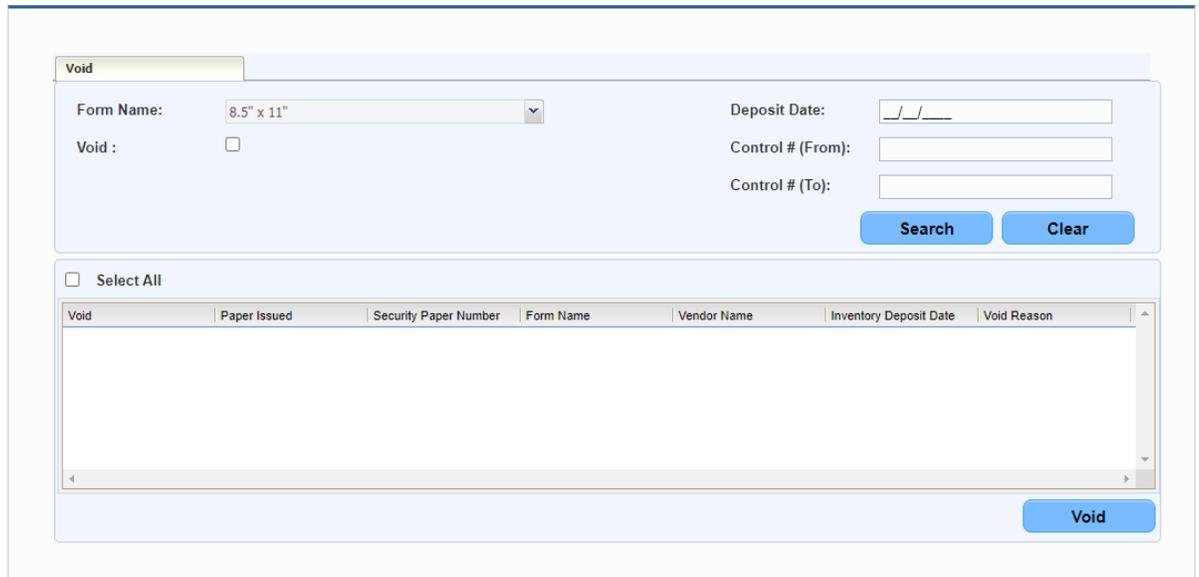
To change the printer, remove the processes that were assigned to the previous printer, and then add the new printer and new processes.

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:

PAPER INVENTORY VOID



Form Name: 8.5" x 11" Deposit Date: / /

Void : Control # (From):

Control # (To):

Search **Clear**

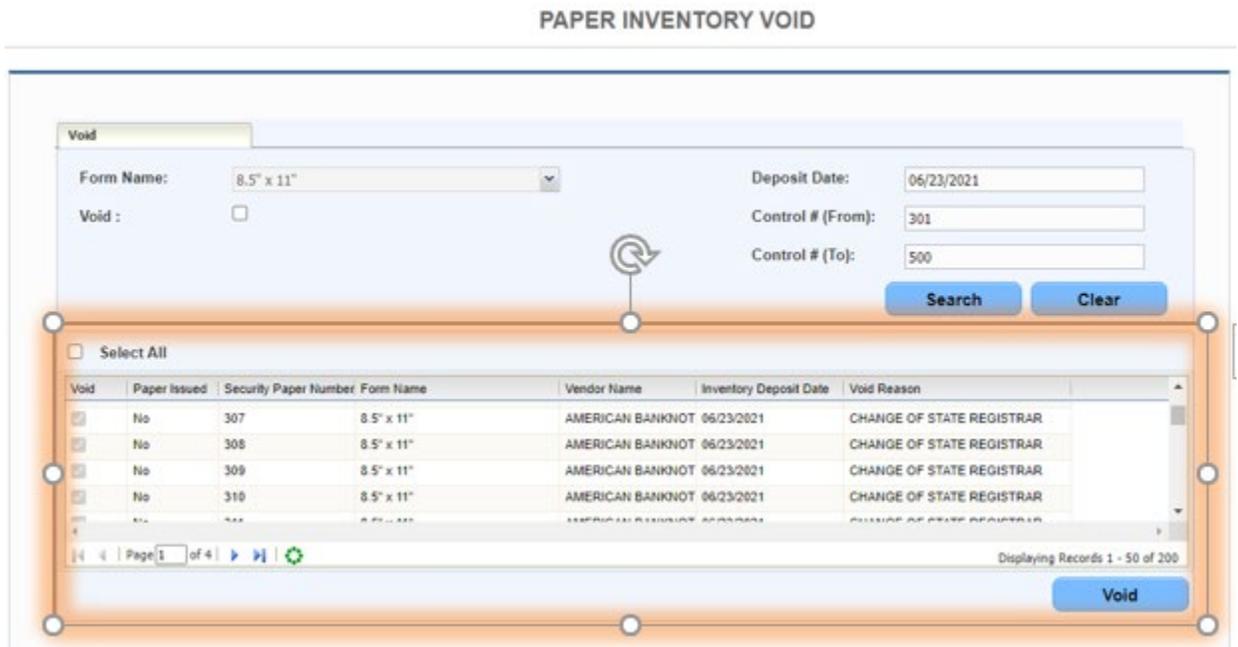
Select All

Void	Paper Issued	Security Paper Number	Form Name	Vendor Name	Inventory Deposit Date	Void Reason
------	--------------	-----------------------	-----------	-------------	------------------------	-------------

Void

95. Paper Inventory Void

2. Enter in the Deposit Date, Control # (From), and Control # (To). Click **Search**. The results will then appear:



Form Name: 8.5" x 11" Deposit Date: 06/23/2021

Void : Control # (From): 301

Control # (To): 500

Search **Clear**

Select All

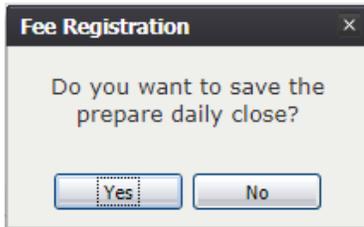
Void	Paper Issued	Security Paper Number	Form Name	Vendor Name	Inventory Deposit Date	Void Reason
<input checked="" type="checkbox"/>	No	307	8.5" x 11"	AMERICAN BANKNOT	06/23/2021	CHANGE OF STATE REGISTRAR
<input checked="" type="checkbox"/>	No	308	8.5" x 11"	AMERICAN BANKNOT	06/23/2021	CHANGE OF STATE REGISTRAR
<input checked="" type="checkbox"/>	No	309	8.5" x 11"	AMERICAN BANKNOT	06/23/2021	CHANGE OF STATE REGISTRAR
<input checked="" type="checkbox"/>	No	310	8.5" x 11"	AMERICAN BANKNOT	06/23/2021	CHANGE OF STATE REGISTRAR

Page 1 of 4 Displaying Records 1 - 50 of 200

Void

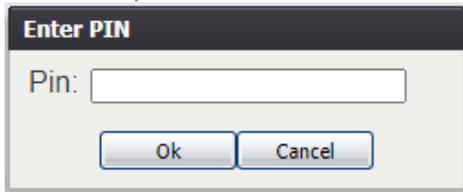
96. Paper Inventory

3. Select the paper to be voided, and then click **Void**. The paper will then be voided.



98. Prepare Daily Close?

- 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:



99. Enter Pin

7.5 Exercise 24—Close Drawer

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

User Name:

CASH DRAWER TOTAL ALL SINCE LAST CLOSING

Cash(\$):	Check(\$):	Credit/Debit Card(\$):	Money Order(\$):
180.00	25.00	0.00	0.00
Cashier Checks(\$):	Refund(\$):	Starting Cash(\$):	Adjustment(\$):
0.00	0.00	0.00	0.00

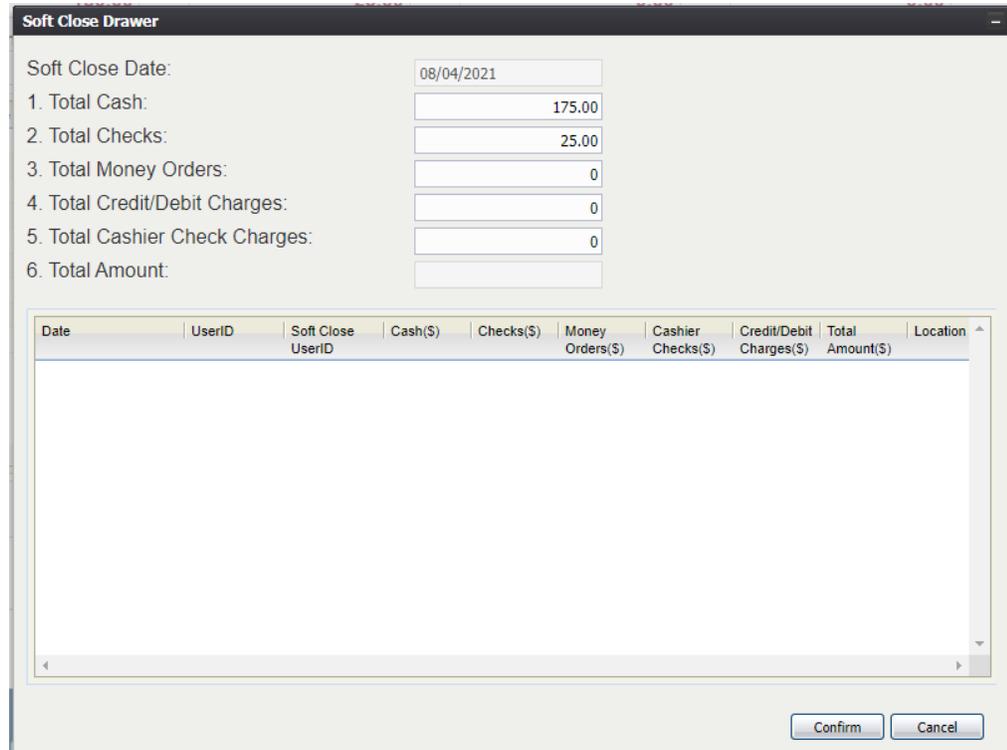
Payment Date	Receipt #	Payer's Name	Invoice Total(\$)	Payment Type	Amount Paid(\$)
08/03/2021	00000000000673	ABBY K	116.00	CASH	5.00
06/24/2021	00000000000027	ANA LEE JONES	22.00	CASH	22.00
06/24/2021	00000000000028	ANA LEE JONES	22.00	CASH	22.00
06/29/2021	00000000000041	TEST TEST TEST	27.00	CHECK	25.00
06/29/2021	00000000000041	TEST TEST TEST	27.00	CASH	2.00
06/29/2021	00000000000042	TEST	25.00	CASH	25.00
06/30/2021	00000000000051	TEST	114.00	CASH	40.00
06/30/2021	00000000000051	TEST	114.00	CASH	42.00
06/30/2021	00000000000051	TEST	114.00	CASH	22.00

100. Closer Drawer

7.5.1 Soft Close

- 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:



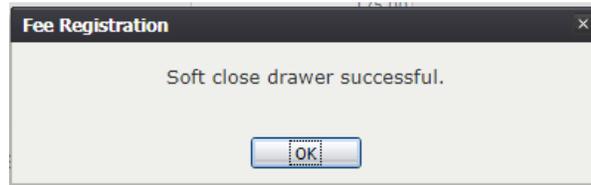
101. Soft Close Drawer

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. 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:



102. Soft Close Drawer?

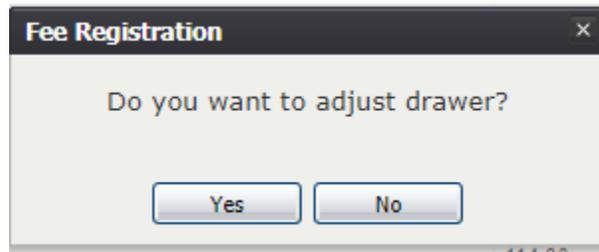
5. Select **Yes**. The following message will appear:



103. Soft Close Drawer Successful

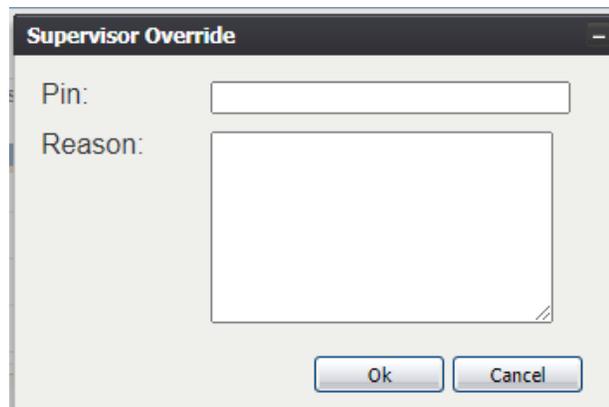
7.5.2 Adjustment

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:



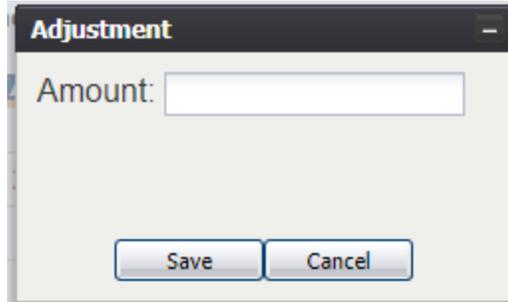
104. Drawer Adjustment?

3. Select **Yes** to adjust the drawer. Select **No** to cancel the adjustment.
4. After selecting **Yes**, the user will have a supervisor enter in their pin and a reason for the adjustment:



105. Supervisor Override

5. After the supervisor enters in the pin and a reason, the supervisor will have to enter in the amount adjusted:



Adjustment

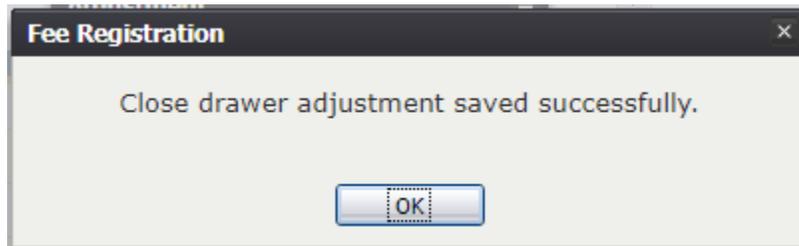
Amount:

Save Cancel

106. Adjusted Amount

Note: To enter in a negative amount, the user will have to enter in a minus (-) sign before the amount adjusted.

- After the adjusted amount is entered, select **Save**. The following message will appear:



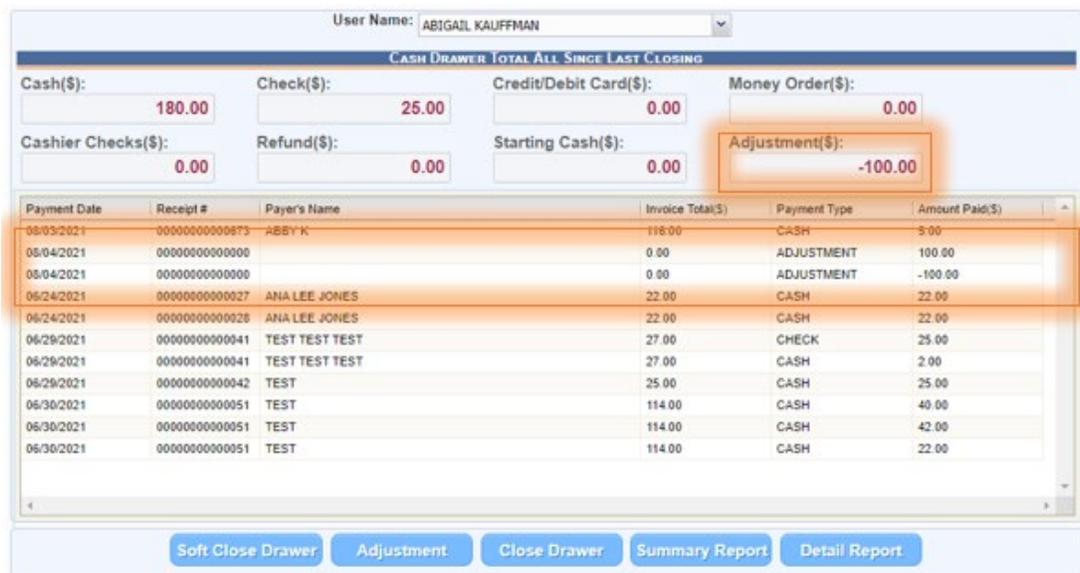
Fee Registration

Close drawer adjustment saved successfully.

OK

107. Adjustment Saved Successfully

The adjustment will be shown within the Cash Drawer:



User Name: ABIGAIL KAUFFMAN

CASH DRAWER TOTAL ALL SINCE LAST CLOSING

Cash(\$):	180.00	Check(\$):	25.00	Credit/Debit Card(\$):	0.00	Money Order(\$):	0.00
Cashier Checks(\$):	0.00	Refund(\$):	0.00	Starting Cash(\$):	0.00	Adjustment(\$):	-100.00

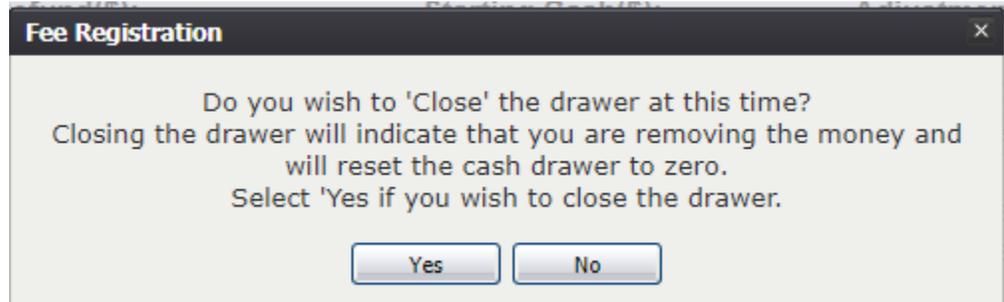
Payment Date	Receipt #	Payer's Name	Invoice Total(\$)	Payment Type	Amount Paid(\$)
08/03/2021	00000000000873	ABBY K	118.00	CASH	3.00
08/04/2021	00000000000000		0.00	ADJUSTMENT	100.00
08/04/2021	00000000000000		0.00	ADJUSTMENT	-100.00
06/24/2021	00000000000027	ANA LEE JONES	22.00	CASH	22.00
06/24/2021	00000000000028	ANA LEE JONES	22.00	CASH	22.00
06/29/2021	00000000000041	TEST TEST TEST	27.00	CHECK	25.00
06/29/2021	00000000000041	TEST TEST TEST	27.00	CASH	2.00
06/29/2021	00000000000042	TEST	25.00	CASH	25.00
06/30/2021	00000000000051	TEST	114.00	CASH	40.00
06/30/2021	00000000000051	TEST	114.00	CASH	42.00
06/30/2021	00000000000051	TEST	114.00	CASH	22.00

Soft Close Drawer Adjustment Close Drawer Summary Report Detail Report

108. Adjustment

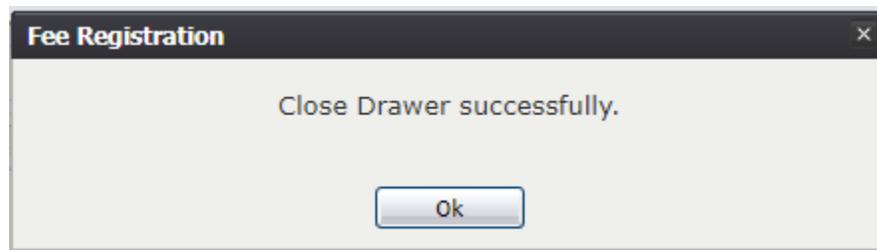
7.5.3 Close Drawer

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:



109. Close Drawer?

3. Select **Yes**. The drawer will successfully close:



110. Close Drawer Successfully

7.6 Exercise 25— 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

Receipts listed in the grid represent un-deposited money that will be included in the deposit now being prepared. If any of the listed items should not be included in the current deposit, that item needs to be unchecked.

Include	Payment Date	Payer's Name	Payment Type	Amount(S)	User ID

1. Total Cash:

2. Total Checks:

3. Total Money Orders:

4. Total Cashier Check Charges:

5. Total Credit/Debit Charges:

5. Total Amount:

111. Prepare Daily Close

2. Enter in the following information:

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

The Total Amount section will auto populate.

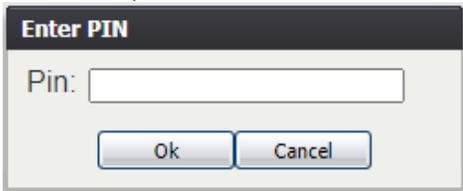
3. Select the **Commit** button. The following message will appear:

Fee Registration ×

Do you want to save the prepare daily close?

112. Prepare Daily Close?

- 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:



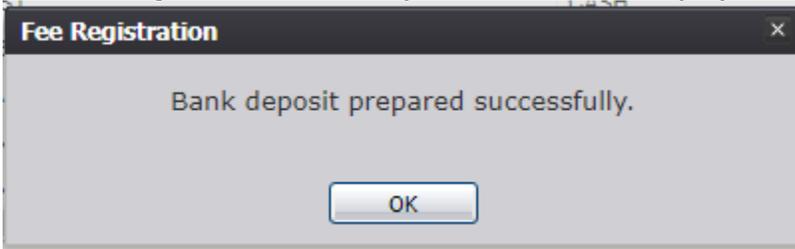
Enter PIN

Pin:

Ok Cancel

113. Enter Pin

- The daily close will be completed. This will also prepare the bank deposit:



Fee Registration

Bank deposit prepared successfully.

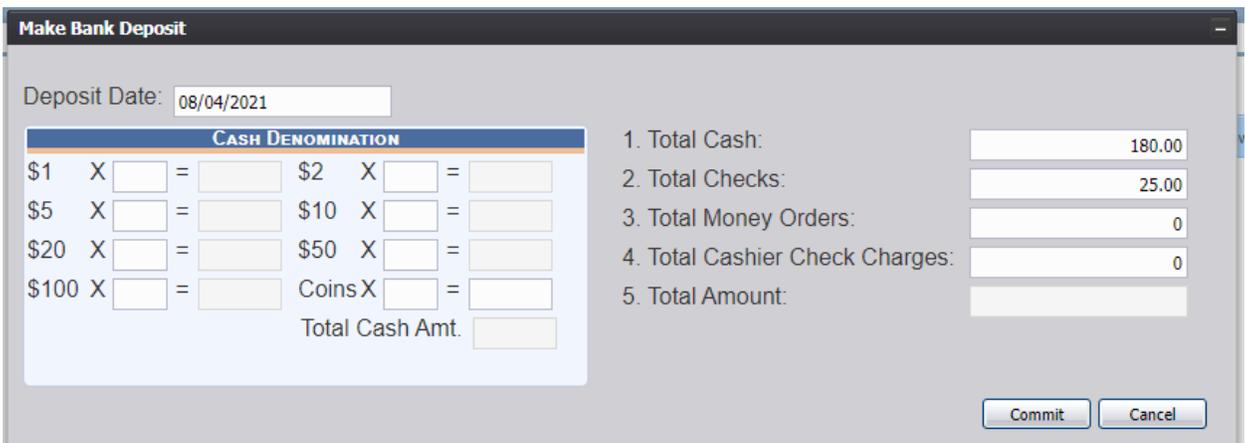
OK

114. Bank Deposit Prepared Successfully

7.7 Exercise 26— Make Bank Deposit

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

- 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

Deposit Date:

CASH DENOMINATION	
\$1 X <input type="text"/>	= <input type="text"/>
\$5 X <input type="text"/>	= <input type="text"/>
\$20 X <input type="text"/>	= <input type="text"/>
\$100 X <input type="text"/>	= <input type="text"/>
\$2 X <input type="text"/>	= <input type="text"/>
\$10 X <input type="text"/>	= <input type="text"/>
\$50 X <input type="text"/>	= <input type="text"/>
Coins X <input type="text"/>	= <input type="text"/>
Total Cash Amt. <input type="text"/>	

1. Total Cash:	<input type="text" value="180.00"/>
2. Total Checks:	<input type="text" value="25.00"/>
3. Total Money Orders:	<input type="text" value="0"/>
4. Total Cashier Check Charges:	<input type="text" value="0"/>
5. Total Amount:	<input type="text"/>

Commit Cancel

115. Make Bank Deposit

- Enter in the Cash Denomination.

Note: The Total Cash Amt. will auto populate.

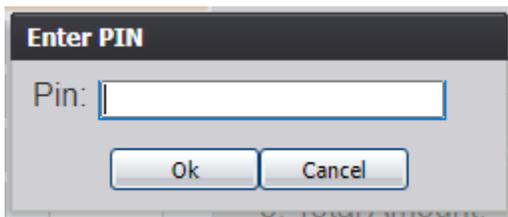
- Review the amount in the following fields and adjust any if needed:
 - Total Cash

- 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:



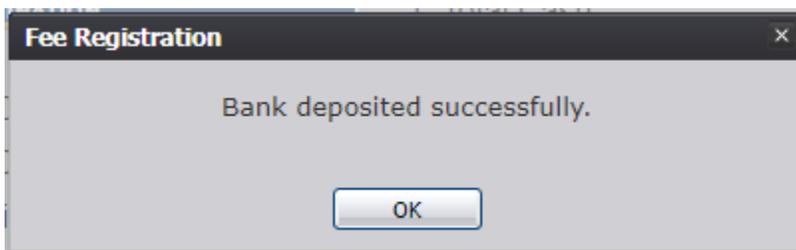
116. Save Bank Deposit?

5. Select **Yes** and then enter in the pin:



117. Enter Pin

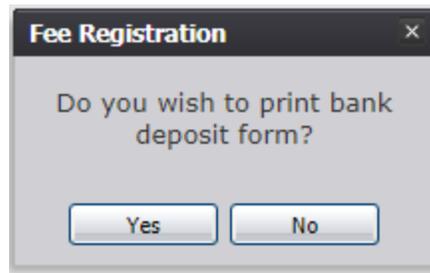
6. After the pin has been successfully entered and accepted, the deposit will be completed:



118. Bank Deposited Successfully

7.7.1 Print Bank Deposit Form

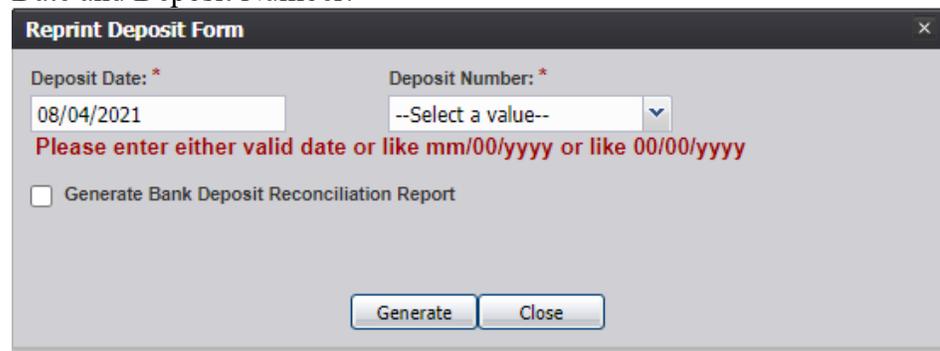
After making the bank deposit, the user will be asked if they want to print the bank deposit form:



119. Print Bank Deposit Form?

By selecting **Yes**, the Bank Deposit Form will be printed. If the user selects **No**, the form will not be printed.

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:

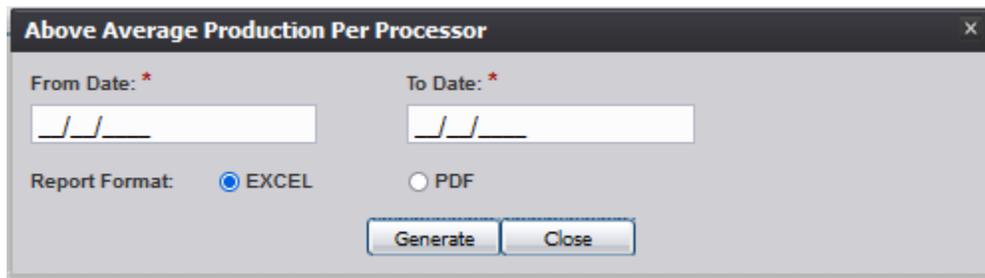


120. Reprint Deposit Form

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:



121. Example Report- Above Average Production Per Processor

3. From this point, enter search criteria, select the file output type, and then click **Generate**.

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.

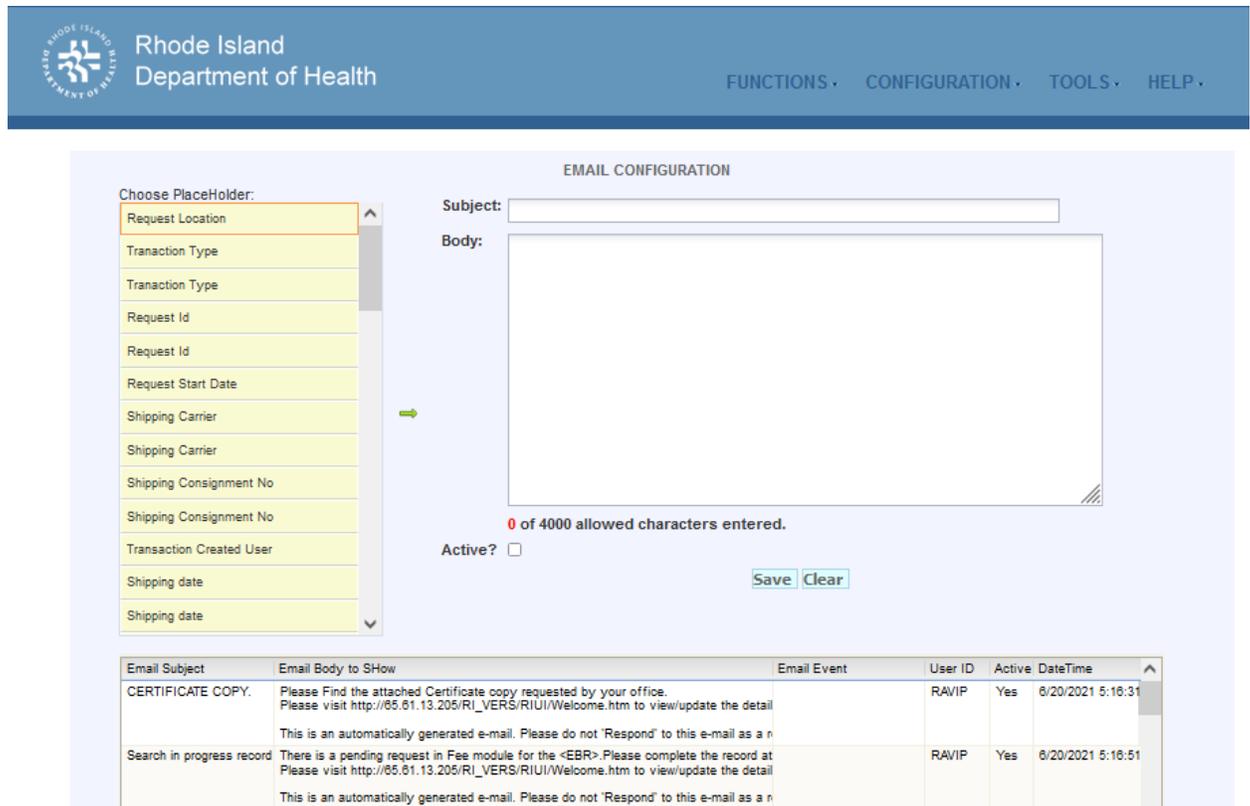
9.0 Fee Configuration

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:



The screenshot shows the 'EMAIL CONFIGURATION' screen. On the left, there is a 'Choose Placeholder:' dropdown menu with a list of options: Request Location, Transaction Type, Request Id, Request Start Date, Shipping Carrier, Shipping Consignment No, Transaction Created User, Shipping date, and Shipping date. A green arrow points from the 'Shipping Carrier' option to the 'Body' text area. The 'Subject:' field is empty. The 'Body:' field is a large text area with a character count of '0 of 4000 allowed characters entered.' Below the text area is an 'Active?' checkbox which is unchecked. At the bottom right of the form are 'Save' and 'Clear' buttons. Below the form is a table with the following data:

Email Subject	Email Body to SHOW	Email Event	User ID	Active	DateTime
CERTIFICATE COPY.	Please Find the attached Certificate copy requested by your office. Please visit http://65.81.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail This is an automatically generated e-mail. Please do not 'Respond' to this e-mail as a n		RAVIP	Yes	8/20/2021 5:16:31
Search in progress record	There is a pending request in Fee module for the <EBR>. Please complete the record at Please visit http://65.81.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail This is an automatically generated e-mail. Please do not 'Respond' to this e-mail as a n		RAVIP	Yes	8/20/2021 5:16:51

122. Email Configuration Screen

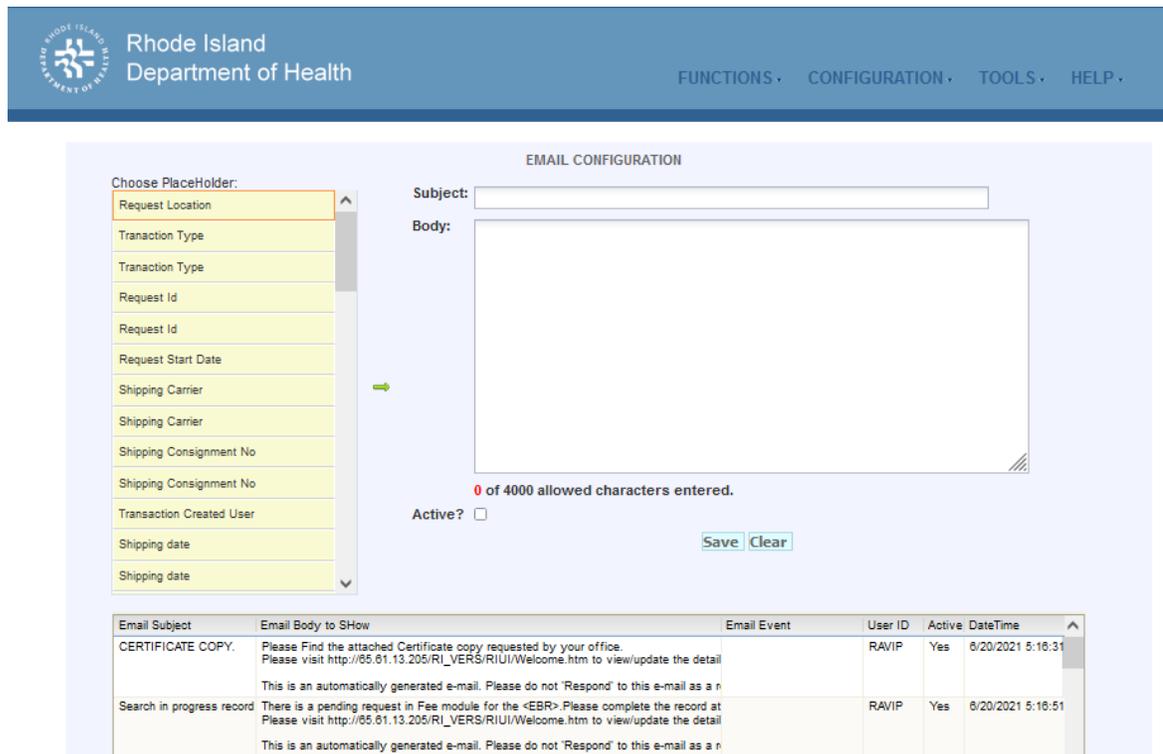
2. Complete the Subject field.
3. Begin composing the body of the automated email.
4. When the need for a placeholder is determined, highlight the desired placeholder(s) and click the green arrow icon to place the placeholders in the body of the email.
5. Click the **Active** checkbox.
6. Click the **Save** 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:



Rhode Island Department of Health

FUNCTIONS · CONFIGURATION · TOOLS · HELP ·

EMAIL CONFIGURATION

Choose Placeholder:

- Request Location
- Transaction Type
- Transaction Type
- Request Id
- Request Id
- Request Start Date
- Shipping Carrier
- Shipping Carrier
- Shipping Consignment No
- Shipping Consignment No
- Transaction Created User
- Shipping date
- Shipping date

Subject:

Body:

0 of 4000 allowed characters entered.

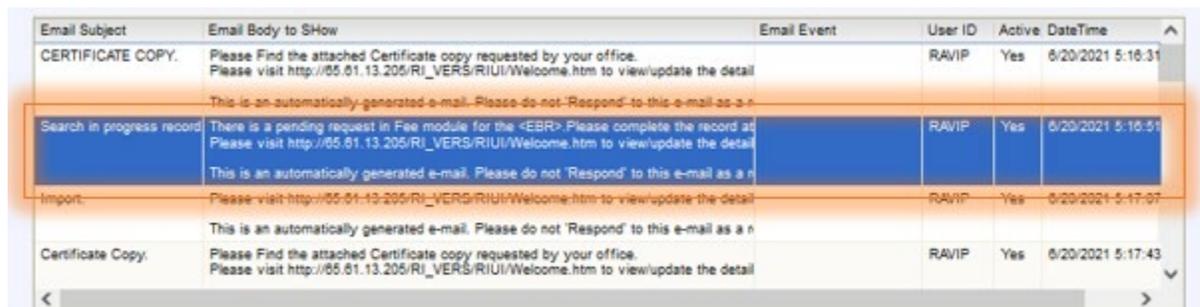
Active?

Save Clear

Email Subject	Email Body to Show	Email Event	User ID	Active	DateTime
CERTIFICATE COPY.	Please Find the attached Certificate copy requested by your office. Please visit http://05.01.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail		RAVIP	Yes	6/20/2021 5:16:31
Search in progress record	There is a pending request in Fee module for the <EBR>. Please complete the record at Please visit http://05.01.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail		RAVIP	Yes	6/20/2021 5:16:51

123. Email Configuration Screen

2. Highlight the email to be edited in the email grid located at the bottom of the screen.
3. The selected email will load in the Email Configuration screen:



Email Subject	Email Body to Show	Email Event	User ID	Active	DateTime
CERTIFICATE COPY.	Please Find the attached Certificate copy requested by your office. Please visit http://05.01.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail		RAVIP	Yes	6/20/2021 5:16:31
Search in progress record	There is a pending request in Fee module for the <EBR>. Please complete the record at Please visit http://05.01.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail		RAVIP	Yes	6/20/2021 5:16:51
Import.	Please visit http://05.01.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail		RAVIP	Yes	6/20/2021 5:17:07
Certificate Copy.	Please Find the attached Certificate copy requested by your office. Please visit http://05.01.13.205/RI_VERS/RIUI/Welcome.htm to view/update the detail		RAVIP	Yes	6/20/2021 5:17:43

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.