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1 About This Document
The Texas Electronic Vital Events Registrar (TxEVER) Web-Enabled Electronic Fee & Issuance System improves timeliness and accuracy of transactions related to such in the State of Texas.

The topics presented in this document represent a comprehensive overview of the features and functionality of the Fee & Issuance module, as it pertains to the Local users of the TXEVER system.

1.1 Intended Audience
This user guide serves as a comprehensive reference for Local users of the TxEVER Fee & Issuance module. Local users may reference this guide in order to acquire a deeper understanding of the Fee & Issuance module.
2 Glossary
Below is a brief introduction to some of the topics that will be covered in the Fee & Issuance user guide.

2.1 Fee Requests
There are two types of requests available in the Fee & Issuance module for Local users: Accounts Receivable Requests and Counter Requests.

2.2 Transaction Information Panel
The New Request Data Entry screen contains multiple panels which enable a wide variety of functionality. The first panel is the Transaction Information panel, which allows users to:

- Select the type of certificate requested
- Enter relationship information
- View and adjust the total amount due for a transaction
- Print certificates
- Indicate that the record had to be issued from paper records, and record information about paper documents
- Issue a refund
- Indicate why a request cannot be completed, and automatically print the Record Not Found letter, Need More Information letter
- Void and/or reprint printed documents

2.3 Payment Information Panel
The Payment Information window is used to enter the type of payment(s) and record the amount of each type of payment. A grid is located within the Payment Information panel and populates with dollar amounts and information about each payment once they have been added to the system. Payments will be applied on a FIFO (First-in and First-out) basis.

2.4 Search Transactions
The Search Transactions functionality allows users to search for records in the system.

2.5 AR (Accounts Receivable) Registration and Invoicing
Accounts Receivable (AR) Registration and Invoicing is used to create new accounts receivable for clients and manage those accounts. AR processes are summarized below:

- Registering and saving new accounts receivable for clients
- Adding credit limits
- Suspending AR accounts
- Entering payments

2.6 Paper Inventory Voiding
Paper Inventory Voiding can be accomplished at a Local level by navigating to the appropriate section of the Fee & Issuance module. Local facilities have the ability to void Local paper, but will be unable to void State paper.
2.7 Supervisor Override
A supervisor override is required when certain processes are initiated in Fee & Issuance. A supervisor override is required in the following situations:

- Voiding previously printed certificates
- Refunding transactions
- Activating and de-activating Accounts Receivable accounts
- Excluding items from a deposit
- Making adjustments to cash drawers or costs

This functionality will not have its own chapter, but will be discussed in each section where it is applicable.
3 List of Terms and Phrases
Below are some common system terms and features used throughout the TxEVER Fee module.

3.1 Navigational / User Interface Terms – Toolbars
Different types of toolbars will be referenced to help users perform a variety of actions and workflows.

Home Page

![Figure 1: TxEVER Homepage](image)

Top Toolbar
The Top Toolbar displays the modules available in TxEVER. The modules available will vary depending on a user’s assigned security processes.

![Figure 2: Top Toolbar](image)
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.

![Functions Toolbar](image)

**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.

![Actions Toolbar](image)

**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 TxEVER Fee module.

![Information Toolbar](image)

### 3.2 Frequently Used Terms and Acronyms

**System**: The term ‘system’ will be used as a reference to TxEVER in its entirety.

**Module**: The TxEVER system is broken-down into multiple self-contained modules that operate independently from one another to deliver separate functionalities to different entities throughout the State of Texas.

**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 County 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.’

TxEVER: The acronym for the system, Texas Electronic Vital Events Registrar.
4 System Overview

4.1 Navigation, Data Entry and Tool Tips
The TxEVER Fee module is designed with intuitive interfaces for a seamless experience. Mouse navigation, keyboard navigation, and Genesis’ proprietary tools help streamline workflows.

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

4.1.2 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.

4.2 System Help Features
The following resources provide ways to get information and support for all of the functionalities included in the TxEVER Fee module:

- Field-level Help
- System-level Help

4.2.1 Field-level Help
Field-level Help provides specific help information related to the field selected, which is displayed in the Field-level Help frame between the data entry tabs and the data entry screen, as shown below.
4.2.2 System-level Help
System-level Help provides a searchable help index with various help topics relating to the functions and processes available within the TxEVER system. Go to Help/Help to access System-level Help.

4.3 Technical Support Resources

4.3.1 TxEVER Help Desk Technical Support
The TxEVER Help Desk is the main source of technical support for users of the Fee module. In order to report an issue to the Help Desk, select Report TxEVER Issue(s) on the TxEVER Front Page screen as shown below:
Figure 7: Report TxEVER Issue(s) Link
5 Login & System Access
The following technical requirements are needed to access the TxEVER Fee module:

- Live Internet connection
- Widely used JavaScript enabled standard web browser (IE11+, Mozilla Firefox, etc.)
- Java runtime
- Adobe acrobat reader for forms and letters
- MS Excel for accessing/running reports

If one or more requirements are missing, the Fee module will **not** be accessible and/or will **not** function properly.

5.1 Accessing the TxEVER Fee Module

1. Go to [https://txever.dshs.texas.gov/TxEverUI/Welcome.htm](https://txever.dshs.texas.gov/TxEverUI/Welcome.htm) and select **Log on to Texas Department of State Health Services** at the bottom of the page.
2. The Terms of Use Screen will load, as pictured below:

![Figure 9: Terms of Use Page](image)

3. Click the Yes button to confirm agreement with the terms of use.
   a. Click the No button to be returned to the TxEVER splash page.

4. Click Log on to TX Vital Events Registration System on the TxEVER Welcome screen to be directed to the login screen below.

![Figure 10: TxEVER Login Screen](image)
5. Enter your assigned user name and password on the **TxEVER Login** page and click **Login**.

6. Select the appropriate location from the drop-down list and press **OK**.

   ![Select Location:](image)

   **Note:** If a user works at multiple physical locations, the drop-down list will display all physical locations assigned to their user account.
   
   a. Click **OK**. The main page of the TxEVER application will be displayed:

   ![TxEVER Main Page](image)

   **Figure 11: TxEVER Main Page**

   **Note:** The highlighted tab at the top of the screen determines what menus and sub-menus will appear.

7. Click the **Fee** tab to go to the **Fee Home** screen.
Note: The highlighted tab at the top of the screen determines what menus and sub-menus will appear. The menus and sub-menus on the Default Home screen go to Library Maintenance, Utilities, and Help options.

5.2 Fee Dashboard
From the Fee Home screen, users may access the Fee Dashboard by clicking on the Show Dashboard button, as pictured in the above screenshot. The Fee Dashboard provides a summary of all completed and pending Fee transactions in the TxEVER 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.
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 TxEVER 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.
5.3 Session Time-Outs

If the system has not detected activity within 20 minutes, the session will time out. Two minutes prior to a session timeout, the system will issue the following warning message:

![Timeout Alert]

Figure 15: Timeout Warning Message

If the system appears to stop responding (i.e., no choices in some pick-lists, cannot save a record, cannot retrieve a record, etc.), the session has likely timed out. The following message will appear when a timeout occurs:

![Timeout Alert]

Figure 16: Timeout Message

To resume working after a session timeout, exit the system and log on again. Frequently saving work will help to prevent session timeouts. For security purposes, log out of the system if you will not be using it for an extended period of time and then log on again when needed.

5.4 About Passwords

Users are assigned a temporary password when they sign up to use the system. This temporary password must be changed upon the user’s first login to the system.

The new password must initially meet all of the following requirements, but a system administrator may change password requirements in the future:

- Must have at least one numeric character
- Must contain uppercase and lowercase characters
- Must contain at least one special character (i.e., #, $, !, @).
- Must be a minimum of 8 characters long

If the new password does not meet these requirements, the message below will appear:
Passwords expire at intervals determined by system administrators. When a user attempts to log on with an expired password, they will be alerted.

A user may also change a forgotten password at any time by clicking the **Forgot Password** button located on the **Login** screen.

### 5.5 Log Out / Exit the System

Exit or log out of the TxEVER Fee module using one of the following methods, as shown below:

1. From the Main Menu, select the **Function/Exit System** menu item to log out

   **OR**

2. Click **Log Out**.

   **Note:** Clicking the [X] in the upper right corner of the screen will close the system, but it is recommended that you exit by using the **Logout** icon or **Exit System** menu option instead. This will ensure that the session fully closes and prevent possible problems when logging on again.
6  Fee & Issuance Module Overview and Navigation

6.1  Fee & Issuance Module Overview
The Fee module provides users with the ability to:

- Create requests for vital records services and certificates
- Assign a department to a particular request
- Enter/edit requestor information on a request
- Enter/edit service transactions on a request
- Enter/edit payment information on a request
- Search vital record databases
- Print vital records retrieved from vital record databases
- Create and manage receivable accounts
- Manage security paper inventories
- Generate reports on transactions, revenue sources, and all items recorded through the module

The Fee module is designed as an order placement and fulfillment system, integrated with a point-of-sale system that facilitates payment collection, accommodating counter, mail, email, and internet orders. The module provides for cash, cashier’s check, credit card, money order, debit, gift card, and accounts receivable payment methods for orders.

Requests may be initiated as new or retrieved from a work queue. The Fee module is divided into three distinct sections: Requestor and Shipping Information, Services Requested Information, and Payment Information.

Once a transaction is paid for in full, the user matches the service to a vital record and processes the service, either printing a certificate or processing a different type of request.

6.2  Fee & Issuance Module Navigation

6.2.1  Functions
The Functions toolbar is the main navigational tool within the Fee module. From this toolbar, users will be able to navigate to alternate areas of the Fee module, as well as perform actions.
There are seven options in the Functions drop-down menu:

1. **Home**: Goes to the Fee Home screen.
2. **Fee Registration**: Goes to the Fee Registration section.

![Fee Registration Screen](image)

**Figure 19: Fee Registration Screen**

3. **AR Registration**: Goes to the AR Data Entry section.
4. **AR Payment**: Goes to the **AR Payment Information** section.
5. **AR Invoice Generation**: Goes to the **AR Invoice Generation** screen.
6. **Switch Location**: Allows users assigned to more than one location in the system to switch locations.

7. **Exit Application**: Logs users out of the system and directs them back to the *Login* screen.
7 Creating New Requests

To create a new request in the TxEVER Fee module, go to Functions/Fee Registration.

The Fee Registration screen allows users to initiate a New Request, a New Transaction, or to Search Transactions.

Figure 24: Fee Registration Screen

Press New Request to load the New Request Data Entry screen.
Figure 25: New Request Data Entry Screen
7.1 Functional Toolbar in New Request Data Entry Screen
From the New Request Data Entry screen, the following new actions will be available in the Functions toolbar:

- Home
- New Request
- New Transaction
- Search Transaction
- AR Registration
- AR Payment
- DFPS Search and Order
- AR Invoice Generation
- DFPS Print
- Search In Progress Records
- Switch Location
- Exit Application

7.2 Actions Toolbar in the New Request Data Entry Screen
The Action toolbar displays actions available on the New Request Data Entry screen.

![Actions Toolbar](image)

- **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
7.3 **Work Queue**

The **Work Queue** in the New Request Data Entry screen lists all records in a user’s queue that are ready for action or review. The **Work Queue** can be found on the upper right side of the page under the Actions toolbar.

![Figure 27: Work Queue](image)

The **Work Queue** is a drop-down menu that contains pending records. The most recent records appear at the bottom and the oldest records appear at the top.

The number on the right side of the **Work Queue** displays how many records in the work queue. The number will update in real-time as records are resolved, or as more records are added to the **Work Queue**.

The **Refresh** icon 🔄 to the left of the number can be used to refresh the numbers in the **Work Queue**.

When searching for records, users can select some or all of the records from search results and create a personal work queue.

7.4 **Informational Toolbar**

The **Informational Toolbar** will populate with all of the information for the respective fields when an existing record is selected from the **Work Queue**.
When a record is selected, the record information populates the **Informational Toolbar**.

### 7.5 Creating New Requests

On the **New Request Data Entry** screen, select **New** from the **Actions** toolbar to capture and/or edit requestor information, as well as assign requests to appropriate departments for processing.

#### 7.5.1 Requestor Information

The **Requestor Information** panel is used to record how a request was received.
The **Requestor Information** section contains the following fields:

- **Request Type**
- **Accounts Receivable** (only selectable if **Accounts Receivables** is selected in Request Type)
- **Other**
- **First Name**
- **Middle Name**
- **Last Name**
- **Suffix**
- **Address 1** *(Required unless the No Return Address Provided check box is selected)*
- **Address 2**
- **State/Country** *(Required unless the No Return Address Provided check box is selected)*
  - **Note**: Clicking the checkbox will populate **Countries** within the drop-down box, as well as the **States**.
- **City/Town**
- **Zip** *(Required unless the No Return Address Provided check box is selected)*
  - **Note**: Becomes mandatory after a state is selected from the drop-down menu
- **Zip Ext.**
- **Email**
- **Phone**
• Priority Comment
  o Comments can be added after a request has been completed.

Note: All fields marked with a red asterisk (*) are mandatory fields.

In addition to the above fields, two additional check boxes can be selected in the Requestor Information panel:

• No Return Address Provided
• Requestor is Minor

7.5.2 Identity Information Panel
The following fields are available:

• Form ID #1 *
• Other Form ID #1
• Form ID #1 Info
• Form ID #2
• Other Form ID #2
• Form ID #2 Info

Note: All fields marked with a red asterisk (*) are mandatory fields.

Some of the fields above are dependent upon what is selected in preceding fields. For instance, the first field, Form ID #1, is a drop-down menu with the following options:

• Debit Card with Photo
• DMV ID Card
• Driver’s License
• Employer Identification Card
• Military ID
• Naturalization Papers
• Passport
• School ID
• State-Issued Photo ID
• Transportation Card with Photo
• Voter’s Registration Card
• Other
• No ID

If Other is selected in this drop-down menu, the Other Form ID #1 field will become enabled for data entry.
Once this field has been resolved, any additional information can be entered into the **Form ID #1 Info** field.

**Note:** Up to two additional forms of ID can be entered, but are not mandatory.

When all mandatory information is entered, press **Save Request**.

**Note:** Comments can be added after a request has been completed.

A notification will appear indicating that the record updated successfully.

![Figure 32: Request Updated Successfully Message](image)

Once the request has been saved, the final element in the Identify Information panel, the **Show Document** button will enable. Clicking this button will allow for the user to view all documents uploaded/scanned as a part of this request. Uploading/scanning documents to a request is explained later in this document.

Once the request has been saved, the other three sections of the **New Request Data Entry** screen can be accessed:

- **Transaction Information**
- **Payment Information**
- **Shipping Information**
Once the record has been saved, the action buttons will be enabled for selection.

7.5.3 Transaction Information Panel
The Transaction Information panel provides options to add, edit, delete, void, print, add DCN, or search for a registered record.

7.5.3.1 Add New in the Transaction Information Panel
To add new transaction information to a request, select Add New, which will open the Transaction Information window:
The first field is the **Transaction Category** field, allowing the user to select the module to which the transaction is applicable.

The **Transaction Type** field allows 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.

For example, when **Birth** is selected in the **Transaction Category** field, the **Birth Requested Information** panel generates below the **Transaction Information** panel.
7.5.3.1.1 Transaction Types
If Birth is selected as the Transaction Category, the following Transaction Types will become available in the drop-down menu:

- Birth Legal Size
- Birth Long
- Birth Short

If Death is selected as the Transaction Category, the following Transaction Types will become available in the drop-down menu:

- Death Legal Size
- Death Long
- Death Manual

If Fetal Death is selected as the Transaction Category, the following Transaction Types will become available for selection from the drop-down menu:

- Certificate of Birth Resulting in Stillbirth
- Certified Copy of Fetal Death

7.5.3.1.2 Requestor Relationship
Once a Transaction Type has been selected from the drop-down menu, the Requestor Relationship must be selected from the next drop-down menu.

Note: Different options are available depending upon which Transaction Category is selected.

The following selections are available:

- Adult Child of Registrant
  - Not available when Death or Fetal Death is selected as the Transaction Category
- Adult Sibling of Registrant
  - Not available when Fetal Death is selected as the Transaction Category
- Father of Registrant
- General Public
- Grandparents of Registrant
- Legal Guardian of Registrant
- Legal Representative
- Mother of Registrant
- Registrant (Self)
  - Not available when Death or Fetal Death is selected as the Transaction Category
- Spouse of Registrant
  - Not available when Fetal Death is selected as the Transaction Category
- Other (Direct and Tangible Interest)
7.5.3.1.3 Transaction Reasons

- School
- Driving License
- Travel
- Other

Note: All options in this drop-down menu are the same regardless of the Transaction Category.

7.5.3.1.4 Quantity
Quantities can be entered as any whole number up to 25. The Cost field will auto-populate depending on the value entered in the Quantity field. In this particular example, note that 10 has been entered into the Quantity field, and that 10 of these Transaction Types costs $33.00. Also note how the Cost field is disabled indicating that it does not require user input and is auto-
Note: Each different Transaction Type has a different Cost associated with it. These values have already been implemented into the system per the State of Texas’ specifications.

Note: The Cost of a document can be adjusted through the Refund/Adjustment process.

7.5.3.1.5 Department Assign
Options available for selection are:

- Special Issuance-Central Print Room

The next options are:

- Transaction Reason - Other: Indicate a reason for a transaction.
- Transaction Comments: Write specific comments related to a transaction.
- Courtesy Letter check box: Indicates a courtesy letter will be printed with the transaction – this is automatically checked depending on the transaction type, but can be manually unchecked
- Issued From Paper check box: Indicate that the transaction was issued from paper
- Veteran Benefit check box: Indicate that the transaction is a veteran benefit and all documents requested will cost zero dollars ($0.00)

Note: Selecting this check box will require a supervisor override. It will require supervisor PIN, but the supervisor reason will not be mandatory.

- Birth Verification checkbox: Indicate that the transaction is a birth verification and not a full birth certificate.

Note: Selecting this checkbox will cause the system to load the following message: “Have you verified the record?”

- No Fee check box: Indicate a zero dollar transaction.
The final two features in this section of the window are the **Upload Document** and **Scan Document** buttons.

![Image of Transaction Information](image)

**Figure 39: Upload Document and Scan Document Buttons**

- **Upload Document**: Upload and attach a document to a transaction
- **Scan Document**: Directly scan a document and attach it to a transaction
7.5.3.2 Upload Document
To upload a document to a particular record, press **Upload Document**, which will generate the following window:

![Upload Document Screen](image)

Figure 40: Upload Document Screen

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.

Once the document has been uploaded, a **Local 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. The following screen will open in a new browser window:
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 TxEVER Fee module.

### 7.5.4 Requested Information Panel

Selecting a **Transaction Category** (i.e., Birth, Death, or Fetal Death), will cause the system to generate the **Requested Information** panel at the bottom of the screen.
For this example, Birth was selected as the transaction type. Regardless of the transaction category selected, all of the fields are the same in the Requested Information section.

**Note:** The only absolute mandatory field (denoted by the red asterisk) is the Registrant Date of _____ field. The ‘blank’ at the end of that field will be replaced with Birth, Death, or Delivery depending on the Transaction Category selected.

The following fields are available in the Requested Information panel:

- Registrant First Name
- Registrant Middle Name
- Registrant Last Name
• Registrant Suffix
• Registrant Sex
• Registrant Date of ____ *
• Registrant County of _____
• Registrant City of _____
• SFN
• Mother’s First Name
• Mother’s Middle Name
• Mother’s Last Name
• Mother’s Maiden Name
• Father’s First Name
• Father’s Middle Name
• Father’s Last Name
• Father’s Suffix

When all known information has been entered, and all mandatory fields have been resolved, press **Save**.

If the record was saved successfully, the following window will appear:

![Figure 46: Transaction Saved Successfully Message](image)

Once **OK** has been selected, the record information will populate into the **Transaction Information** panel on the **New Request Data Entry** screen.
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.

- **Edit**: Edit the selected transaction in order to either add more data, or edit the data already entered.
- **Refund/Adjustment**: Create a refund/adjustment for a selected transaction.
- **Delete**: Delete a selected transaction.
- **Void**: Void a transaction after it has been printed.
- **Find Record**: Search the system for registered records matching the data entered in the transaction. When selected, the Fee Record Search screen will appear:
- **Print**: Print the transaction.
- **Add DCN**: Add security paper DCN to the record.
- **Add Letter**: Attach specific letters to specific documents.

**Note**: This action can be performed only when the record has been printed.
7.5.5 Status Column within the Transaction Information Panel

The Transaction Information panel features a column that displays the current status during the Create New Request process.

<table>
<thead>
<tr>
<th>Status</th>
<th>Amount($)</th>
<th>Adjusted Amount($)</th>
<th>SFN</th>
<th>Registrant's Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEARCHABLE</td>
<td>22.00</td>
<td>22.00</td>
<td>0000362010</td>
<td>BABY SELF</td>
</tr>
<tr>
<td>VOITED</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 48: Status Column in Transaction Information Panel

The Status column displays one of several statuses indicating the next step necessary to continue with the transaction. Transaction Information statuses include:

- **Not Searchable**: When a record indicates that it is Not Searchable, the cause for that is insufficient payment in the case of a Counter request type. Continue to the Payment Information panel and reconcile the payment for the record prior to continuing a Counter request.

- **Searchable**: When a record indicates that it is Searchable, users can navigate to the Search Registered Record button to perform the search.

- **Ready to Print**: When a record is in the Ready to Print status, users may then select the Print button to print the request.
  - **Note**: In order to Print a record, users must first have a printer setup to their username.

- **Printed**: When a record is in the Printed status, this is the point at which a Security Paper DCN can be added to the record by clicking the Add DCN button.

- **Completed**: When a record is in the Completed status, this indicates that the process has reached an end. When all line items in the Transaction Information panel are in Completed status, this is the point at which the request may be completed – as long as the other panels are resolved.

**Ready for Shipping**: The Ready for Shipping message will only generate in the Status column when it is directly attached to a shipment. To resolve this status, users must reconcile the Shipment Information panel.

As previously stated, for all transaction types other than Counter, requests may be completed and fulfilled before payment has been received. In the case of a Counter request, payment must be recorded before the status of the transaction will be updated to Searchable. For all other request types, the status will be set to Searchable when the request is saved.
7.5.5.1  **Fee Record Search**

To open the Fee Record Search screen, click the desired transaction in the **Transaction Information** grid and click the **Find Record** button located below the **Transaction Information** grid.

The **Fee Record Search** screen will open:

![Fee Record Search Screen](image)

**Figure 49: Fee Record Search Screen**

From the **Fee Record Search** screen, users are able to search for, view and assign the record to the relevant transaction

7.5.5.2  **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):
Figure 50: Fee Record Search Screen with Results

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

Figure 51: No Record Found Message

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

Figure 52: Request Suspended Successfully Message
ii. To complete the transaction, click the **Complete** button and the system will display the following message:

![Figure 53: Printing Not Found Letter Message](image)

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

![Figure 54: Not Found Letter Added Successfully Message](image)

### 7.5.5.3 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.

### Assign a Record to a Transaction

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 **Assign** button.
5. The system will issue a message that the record has been assigned successfully. On the **Transaction Information** grid, the status of the transaction will be set to **Ready to Print** and the SFN column will be populated with the assigned record’s SFN.
7.5.6  Editing an Existing Transaction
Selecting Edit from the Transaction Information panel will load the Transaction Information window with the transaction information already populated.

Figure 55: Transaction Information Screen

A transaction cannot be edited once the transaction status is Ready to Print.

A user can edit the following fields on the Transaction Information screen once a transaction has been saved:

- Requestor Relationship
- Transaction Reason
- Quantity
- Department Assign
- Transaction Reason-Other

Additionally, all fields in the Requested Registrant Information section can also be edited.

7.5.7  Making an Adjustment to a Transaction
Users may make adjustments to existing transactions by adjusting the amount of transaction copies being requested.

To make an adjustment:
1. Click **Adjustment**.

   **Note:** An Adjustment can also be made from the Refund/Adjustment button located at the bottom of the Transaction Information panel. The following functionality is the same regardless of which method is used.

A confirmation message will appear asking the user if they wish to proceed with the adjustment process:

![Figure 56: Transaction Copy Adjustment Confirmation Message](image)

2. Click **Yes** to proceed, or **No** to cancel.

   **Note:** This will generate a Supervisor Override screen and require a supervisor with the appropriate permissions to enter their PIN and a reason for the adjustment.

![Figure 57: Supervisor Override Screen](image)

3. Click **OK** to generate the Adjustment Transaction window.

4. Click the Category of the transaction in the Adjustment Transaction window and change the dollar amount in the Adjust Amount column.

5. Press **Save**.

   **Note:** A red triangle will appear in the upper left corner of the Adjust Amount ($) field, indicating that it has been changed.

6. 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.
7.5.8 Adding/Viewing Comments on a Transaction

Users may add new comments to existing transactions and view comments previously added to a transaction.

1. Select Add/View Comments to open the following window:

![Add/View Comments Screen](image)

In the Comments field, enter a comment (up to 500 characters), check the high priority checkbox if desired and press Add.

Also, the bottom panel of the Add/View Comments screen will list any past comments with a stamp that details the date, time, and user that submitted the comment.

7.6 Payment Information Panel

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.

The total dollar amount within the Transaction Information panel is linked to the Payment Information panel. When adding new payment information, the dollar amount cannot greater than the total in the Transaction Information panel.

![Payment Information Panel](image)
The **Payment Information** buttons include:

- **Add New**: Add new payment information to the panel
- **Edit**: Edit previously entered payment information
- **Delete**: Delete any existing payment information within the panel
- **Re-assign**: Re-assign specific and existing payment information within the panel
- **Receipt**: Create a receipt for an existing payment transaction

### 7.6.1 Adding New Payment Information

Select **Add New** to begin adding a new entry in the **Payment Information** panel.

![Figure 60: Payment Information Panel-Add New Button](image)

This will generate the **Payment Information** window with the **Payment Information** panel, and the **Payer(s) Information** panel.
The following fields are present in the Payment Information panel:

- Payment Type *
- Payment Date
- Amount Received *
- Reference #
- Reference Date
- Payment Comments

First, select the Payment Type from the drop-down menu:
The following payment types are available:

- Cash
- Cashier Check
- Check
- Credit/Debit Card
- Gift Certificate
- Money Order

Depending on the **Payment Type** selected, different fields will become mandatory fields.

- **Cash**: Amount Received
- **Cashier Check, Check, or Money Order**: Amount Received, Reference #, Reference Date
- **Credit/Debit Card**: Amount Received, Reference #, Reference Date
- **Gift Card**: Amount Received, Reference #

For this example, **Cash** will be selected as the payment type received. Once the payment type is selected, enter all known information, and enter a comment in the **Payment Comments** section, if applicable.

**Note**: When entering an amount into the **Amount Received** field, it cannot be greater than the total dollar amount in the **Transaction Information** panel.

In the following screenshot, there are three transactions in the panel. One transaction is for an amount of $6.00, one transaction is for an amount of $10.50 and one transaction is for an amount of $1.50.

![Figure 63: Transaction Information Panel with Three Transactions Added](image)

In the **Payment Information** section, all three transactions can be reconciled in one payment, or the transactions can be settled in three separate payments. For example, assume that the user wants to reconcile the transaction in one payment. In this case, an amount of $18.00 would be entered into the **Amount Received** field.

![Figure 64: Amount Received Field](image)
7.6.2 Payer Information Panel

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

![Payer Information Panel](image)

Figure 65: Payer Information Panel

Fields in the Payer(s) Information panel include:

- First Name
- Middle Name
- Last Name*
- Suffix
- Address 1
- Address 2
- State/Country
- City/Town
- Zip
- Zip Ext
- Email
- Phone

Within this panel, 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.

![Payer Information Panel](image)

Figure 66: Payer Information Panel
Next, enter all known payer information.

**Note:** Click the checkbox next to the **State/Country** field to populate **Countries** within the drop-down box as well as **States**.

Once all mandatory fields have been filled and all additional information has been entered, click **Total/Done**. To cancel the payment, click **Cancel**.

![Payment Information Screen with Payment Added and Total/Done Button](image)

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

![Record Saved Successfully Message](image)

After selecting **OK**, the payment will display in the **Payment Information** panel.
7.6.2.1 Subtotal Button

The **Subtotal** button is used with multiple tenders to reconcile the payment due. In the screenshot below, for example, the **Balance Due** is $40.00 and a payer wants to pay $20.00 of this transaction: $10.00 in cash and $10.00 on a credit/debit card.

To apply the first payment method:

1. Enter **Cash** into the **Payment Type** drop-down menu.
2. Enter 10.00 into the **Amount Received** field.
3. Click **Sub-Total**.

The **Balance Due** is now $30.00.
To apply another payment method:

1. Go to the **Payment Type** field and select **Credit/Debit**.
2. Enter 10.00 into the **Amount Received** field.
3. Click **Total/Done**.

In this example, the payer does not want to pay any more toward the balance. Press **Total/Done** to save the current payments, which will then be reflected in the **Payment Information** panel. The following message will appear indicating that the payments were made successfully:

![Message: Payment saved successfully.](image)

**Figure 72: Payment Saved Successfully Message**

**Note**: If **Cancel** was pressed by mistake instead of **Total/Done**, the payments taken will not be recorded and will not be reflected in the **Payment Information** panel.
7.6.3 Editing a Payment
In order to edit a payment from the Payment Information panel, highlight the record and press "Edit."

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

A user can edit the following fields on the Payment Information screen once a payment has been saved:

- Payment Type
- Reference # (if applicable)
- Reference Date (if applicable)

Additionally, all fields in the Payer Information section can also be edited.
7.6.4 Deleting a Payment

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

![Payment Information Panel](image)

**Figure 75: Payment Information Panel-Delete Button**

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

![Delete Confirmation Message](image)

**Figure 76: Delete Confirmation Message**

If **Yes** is selected, the **Supervisor Override** window will appear. A supervisor will be required to enter their PIN and a reason for payment deletion, and then press **OK**.

![Supervisor Override Screen](image)

**Figure 77: Supervisor Override Screen**

The following message will appear if the record is deleted successfully:

![Record Deleted Successfully Message](image)

**Figure 78: Record Deleted Successfully Message**

Users will then be returned to the main screen, and see that the record has been successfully removed from the **Payment Information** panel.
If the supervisor is not available, or is unable to enter a PIN, press **Cancel**.

If the supervisor incorrectly enters their PIN, the following rejection message will appear, and after pressing **OK**, will return the user to the **Supervisor Override** screen.

### 7.6.5 Re-Assigning a Payment

When there are multiple transactions for an individual record, the **Re-Assign** function allows payments received to be assigned to specific transactions.

For example, in the screenshot below, there are eight charges on the account that display in the **Transaction Information** panel:
In the **Payment Information** panel, there is one payment for $18.00. To assign the $18.00 to a specific transaction, select the $18.00 payment from the **Payment Information** panel and press **Re-Assign**.

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

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

In order to assign the $18.00 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:

![Payment Re-Assigned Successfully Message](image)

**Figure 84: Payment Re-Assigned Successfully Message**

### 7.6.6 Generating a Receipt

To generate a receipt for a payment, select the payment and press **Receipt**.

![Payment Information Panel-Receipt Button](image)

**Figure 85: Payment Information Panel-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.
7.7 Shipping Information Panel

In order to add a new shipment to the **Shipment Information** panel, first select **Add New**.

![Shipping Information Panel-Add New Button](image)

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

![Shipping Information Screen](image)

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.

The following fields are available in the **Shipping Information** panel:

- **Shipping Method**
- **First Name**
- **Middle Name**
- **Last Name**
- **Suffix**
- **Address 1**
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.

**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.

To start a shipment, select a **Shipping Method** from the drop-down menu. Available shipping methods are:

- Hand Delivered
- FedEx STD Shipping
- FedEx 2 Day Shipping
- UPS STD Shipping
- USPS STD Shipping
- FedEx Overnight Shipping
- Lone Star STD Shipping
- Lone Star 2 Day Shipping
- Lone Star Overnight Shipping
- UPS 2 Day Shipping
- Email
After a shipping method has been selected, either check the **Address Same as Requestor** box or fill in the **Shipping Information** fields manually.

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.
7.7.1 Enclose(s) Information Panel

In the Enclose(s) Information panel, users can determine what documents need to be included in a shipment.

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.

Once all of the documents have been added for the shipment, click Save. To cancel the process, click Cancel.
Prior to the shipment saving, the following window will appear:

Select **Yes** to assign the shipment the default shipping cost and generate it under the *Transaction Information* panel.

**Note:** If the **Shipping Method** requires a different shipping cost other than the default cost, select **No**. This will cause the message to close and the cursor will appear in the Shipping Cost field so that a shipping cost can be recorded.

If the shipment information saves successfully, the following message will appear:
Additionally, the shipment will appear in the **Shipping Information** panel:

![Figure 97: Shipping Information Panel with Shipment Information Added](image)

### 7.7.2 Editing a Shipment

After a shipment has been created, press **Edit** on the **Shipping Information** panel to correct shipment information, if needed.

![Figure 98: Shipping Information Panel-Edit Button](image)

This action will re-generate the **Shipping Information** window with the previously entered information pre-populated in each field.
A user can edit the following fields on the **Shipping Information** screen once a shipment has been saved:

- First Name
- Middle Name
- Last Name
- Suffix
- Address 1
- Address 2
- State/Country
- City/Town
- Zip
- Zip Ext
- Email
- Phone
- Tracking Number
- Tracking Date
- Shipping Note

Additionally, selections made in the **Enclose(s) Information** section can also be edited. Once the information has been edited, click **Save**. To cancel the process, press **Cancel**. When **Save** is selected, the following message will appear:
Note: If the user has already assessed a dollar amount to this shipment, they may select No and then enter the dollar amount into the Cost field. If a user accidentally selects Yes, they can edit the shipment cost in the Transaction Information panel.

Selecting Yes will generate the following message:

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

### 7.7.3 Deleting a Shipment

To delete a shipment, select the shipment from the Shipping Information panel and then press Delete.

Pressing Delete will generate the following message:

Select Yes to delete the shipping request. Select No to keep the shipping request.
**7.8 Navigating to the New Transaction Data Entry Screen**

New transactions can be initiated from several places within the Fee module.

The first option is to go to Function/Fee Registration.

This will generate the following page, which includes a **New Transaction** button.

![Figure 104: Fee Registration Screen-New Transaction Button](image)

Select **New Transaction** to generate the **New Transaction Data Entry** screen.
Another way to reach the New Transaction Data Entry screen is to expand the Functions drop-down menu on the Functions Toolbar from anywhere within the Fee module and then select New Transaction.

7.9 Understanding the Toolbar in New Transactions
Going to the New Transaction Data Entry screen will automatically generate a new, blank record.
The **Actions** toolbar contains the following actions:

**New**: Starts a new transaction.

**Save and Go To Request**: Saves a transaction and go to the Create New Request Data Entry screen to process the transaction.

**Save**: Saves a transaction.

**Cancel**: Cancels the transaction.
7.10 Creating a New Transaction

Once a new transaction has been started, the **New Transaction Data Entry** screen will appear.

![New Transaction Data Entry Screen](image)

The following fields are available on the **New Transaction Data Entry** screen:

- **Transaction Category**
- **Transaction Type**
- **Relationship**
- **Department Assign**
- **Quantity**
- **Remit**
- **Cost**
- **Gift Number**
- **Transaction Reason**
- **Transaction Reason Other**

In addition to the fields on this page, there are five check boxes towards the bottom of the page:

- **Courtesy Letter**
- **Issued From Paper**: Indicates that the transaction was issued from paper.
- **Veteran Benefits**: Indicates that the transaction is a veteran benefit.
- **No Fee**: Indicated that transaction is a zero-dollar transaction.
- **Birth Verified**
**Note:** Selecting the No Fee check box will require a supervisor override. A supervisor PIN is mandatory and a comment is also mandatory.

Two additional buttons allow users to attach and scan documentation:

- **Upload Document**: Upload any associated documents to this specific transaction.
- **Scan Document**: Use an installed scanning device to scan a document and attach it to this specific transaction.

### 7.10.1 Transaction Category

The **Transaction Category** field allows the user to select the module to which a transaction is applicable.

---

**Figure 108: Transaction Category Field**

---
7.10.2 Transaction Type
The Transaction Type field allows users to select the specific type of transaction associated with a record.

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

7.10.3 Transaction Reason
- School
- Driving License
- Travel
- Other

Note: All options in this drop-down menu are the same regardless of the Transaction Category selected.

7.10.4 Department Assign
The following fields are available in the Department Assign drop-down menu:
- Special Issuance-Central Print Room

7.10.5 Quantity
In the Quantity field, any whole number up to 25 may be entered. The Cost field will auto-populate depending on the value entered in the Quantity field. In this example, one has been entered into the Quantity field, and that one of these Transaction Types costs $22.00. The Cost field will be disabled, indicating that it does not require user input and is auto-populated.

The next options are:
Gift Number: If the transaction type indicates a gift certificate, this field requires data entry.
Transaction Reason - Other: If Other is selected from the Transaction Reason field, allows free text to enter additional information.
Transaction Comment: Record comments that relate to a transaction.

   Courtesy Letter checkbox
   Issued From Paper checkbox: Indicate that the transaction was issued from paper.
   Veteran Benefits check box: Indicate that the transaction is a veteran benefit.
   Note: Selecting this check box will require a supervisor override. A supervisor PIN is required, but a supervisor comment is optional.
   No Fee check box: Indicate that the transaction is a zero dollar transaction. This option will only be visible to the State office.
   Birth Verified check box:
   Once all necessary fields have been resolved, continue to either Upload Documents or Scan Documents.
   The final two features in this section of the window are the Upload Document and Scan Document buttons.
6. Upload and attach a document to a transaction
   - Directly scan a document and attach it to a transaction

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

Enter the **Document Type**, **Who Issued** the document, and the **Date Issued** into the corresponding fields and then click **Upload Document**.

![Upload Document Screen](image)

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.

![File Uploaded Successfully Message](image)

7.10.7 Scan Document
To scan a document to a particular record, press **Scan Document**, which will generate the following window:
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.
8 Searching for Existing Transactions

TxEVER has a comprehensive search functionality that can run queries on all existing transactions in the system.

To search for a transaction:

1. From the TxEVER Fee module, go to Functions / Fee Registration.

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

![Figure 112: Fee Registration Screen-Search Transactions Button](image)

2. Select **Search Transactions**. The following page will load:
Or, from within the Fee module, go to Functions / Search Transactions.

8.1 Navigating the Search Screen
The Search screen is composed of several panels with different fields that can be used to search for a transaction.
8.1.1 Requestor’s Information Panel

The following fields are available on the Requestor’s Information panel:

- **Request #**: The unique request number, if known
- **Request Type**: A drop-down menu with the following options:
  - **Counter**
- **Request Begin Date**: The earliest date that the request could have been initiated.
- **Request End Date**: The latest date that the request could have been initiated.
- **First Name**: First name of the requestor
- **Last Name**: Last name of the requestor
- **Suffix**: Suffix of the requestor
8.1.2 Payment Information Panel

The following fields are available on the Payment Information panel:

- **Payment Method**: A drop-down menu that consists of the following options:
  - Cash
  - Cashier Check
  - Check
  - Credit / Debit Card
  - Gift Certificate
  - Money Order
- **Receipt / Invoice #**: The unique receipt or invoice number, if known
- **Payment Date**: The payment date of the transaction, if known.
- **Reference #**: The unique reference number, if known.
- **Reference Date**: The date that the reference number was created
8.1.3 Transaction Information

The following fields are available on the Transaction Information panel:

- **Trans Category**: Search transactions related to a specific module within TxEVER. Options include:
  - Birth
  - Death
  - Divorce
  - Fetal Death
  - Marriage

Once a selection is made from the Trans Category field, another panel will generate that corresponds to the selection made in the Trans Category field. The panel generated is the **Requested Information** panel. The ‘blank’ at the beginning of ‘Requested Information’ is meant to signify that the panel name changes depending on the category selected.

For example, if Birth is selected from the Trans Category drop-down menu, then the generated panel will display as Birth Requested Information.

- **Trans Type**: Depending on the Transaction Category selected above, the Trans Type field will display options for the specific document that the transaction is attached to (i.e., Birth Certificate, Death Certificate, etc.).
8.1.4 Requested Information Panel
As mentioned above, a fifth panel will generate once a Trans Category is selected. The generated panel will have fields that specifically pertain to the transaction information that was requested.

![Requested Information Panel](image)

Figure 119: Search Transaction Screen-Requested Information Panel

8.1.5 Search Information
Search results will appear in the Search Information panel.

![Search Information Panel](image)

Figure 120: Search Transaction Screen-Search Information Panel

8.2 Performing a Search
To perform a search, enter all known information into the corresponding search fields.

The last two search-related criteria are the Search Type option and the Request Status option.

8.2.1 Search Type
There are two search types:

- **Wildcard Search**: Takes information entered into the fields and looks for exact matches to the information entered.
- **Soundex Search**: Takes information entered into the fields and searches for exact
matches, as well as matches that sound similar to the data entered.

8.2.2 Request Status
From the Request Status drop-down menu, select Complete or Incomplete. This option is useful when searching for transactions that are known to be complete or incomplete.

8.2.3 My Record
The My Record check box will initiate a search only for records that are attributed to the user that is currently logged on to the system. The check box is checked, by default.

Once all known information is entered, click Search.

![Search Transaction Screen-Search Button]

Click Search to generate results in the Search Information panel.

![Search Transaction Screen-Search Information Panel]

Three actions are available after the search results load:

- **Select All**: Select every record that appears in the search results.
- **Go To Request**: Go to the selected request. If multiple requests are selected, then every request will be opened in succession. The requests will display with the most recently created request at the beginning and end with the oldest created request.
- **Clear**: Clear all search results, as well as all information entered into the search fields on all search panels.
9 Accounts Receivable
The Accounts Receivable (AR) section of the Fee module allows users to register new AR accounts, as well as create and reconcile invoices.

9.1 AR Registration
To access AR Registration, go to Function / AR Registration. The AR Data Entry screen will load.

![Figure 123: AR Registration Screen](image)

9.1.1 AR Data Entry Screen Navigation
Located at the top of the AR Data Entry screen is the Actions toolbar, which contains all of the different functions that can be initiated from this page.

![Figure 124: AR Registration Screen-Actions Toolbar](image)

The Actions toolbar includes the following actions:

- **New**: Creates a new AR record.
- **Save**: Saves the AR record.
• **Cancel** 🍀: Cancels an unsaved AR record, or cancels any changes made to an AR record since the last save.

• **Delete AR** ✗: Deletes an AR record

• **First Record From Work Queue** 🔽: Goes to the first record in the work queue from the current position in the work queue.

• **Previous Record From Work Queue** ⬅️: Goes to the record immediately preceding the current position in the work queue.

• **Next Record From Work Queue** ➡️: Goes to the next record in the work queue from the current position.

• **Last Record From Work Queue** ➩: Goes to the last record in the work queue from the current position in the work queue.

![Figure 125: AR Registration Screen-Information Toolbar](image)

The **Information** toolbar above displays information related to any items selected in the **Accounts Receivable** work queue.

The **Accounts Receivable** work queue consists of the drop-down menu on the right side of the screen. The work queue is populated with AR records already entered into the system. The quantity of the records in the work queue is denoted by the number directly to the right of it. There is also a **Refresh** icon 🔄 beside the work queue that can be used to refresh the queue in real-time.

Once a record is selected from the **Account Receivable** work queue, the information that has been previously entered and saved into the system will populate in all of the fields on the **AR Data Entry** screen.
In addition to the **Actions** toolbar, there are three panels that make up the **AR Data Entry** screen.
9.1.2 Accounts Receivable Information

![Accounts Receivable Information Panel]

Figure 127: AR Registration Screen-Accounts Receivable Information Panel

9.1.3 Account Information

![Account Information Panel]

Figure 128: AR Registration Screen-Account Information Panel
9.1.4 Contact Information

![Contact Information Panel](Image)

Figure 129: AR Registration Screen-Contact Information Panel

9.1.5 Creating a New Accounts Receivable Entry

When users first arrive at the AR Data Entry screen, the screen will default to a new record. However, if users were previously working on a record and need to start a new record, users would then have to use the New icon located on the Actions toolbar. This will clear all of the fields within the AR Data Entry screen and allow a user to create a new record.

To begin, fill out all mandatory fields (fields marked with red asterisks). The fields above that were filled-out were the Name of the company or account holder, the Starting Invoice Number and the Location of this account.

Note: The Location field is a drop-down menu that will allow users to select from a list of approved locations that have been pre-loaded into the TxEVER system.

Other fields include:

- **Reference Number**: The unique reference number.
- **Preferred Shipping Method**: The preferred shipping method. The options from the Preferred Shipping Method drop-down menu include:
  - Hand Delivered
  - FedEx STD Shipping
  - FedEx 2 Day Shipping
  - UPS STD Shipping
  - USPS STD Shipping
  - USPS 2 Day Shipping
  - USPS Overnight Shipping
  - Shopping Pending
  - FedEx Overnight Shipping
  - Lone Star STD Shipping
  - Lone Star 2 Day Shipping
  - Lone Star Overnight Shipping
  - UPS 2 Day Shipping
  - Email

Once all information has been entered in the Accounts Receivable Information panel, continue to the Account Information panel to record specific account-related information.

The Account Information panel is composed of four (4) check boxes:

- **Display List**: Enable the record to display so that it can be found in the work queue
- **Active**: Indicate that the account is active and not closed
- **Credit Suspended**: Indicate that the credit on the account has been suspended
  - **Note**: When an account is suspended, if a user attempts to pull-up the account in the New Request Data Entry screen (mentioned in a previous section), a message will generate indicating to the user that the account has been suspended
  - **Supervisor Note**: In order to suspend or un-suspend an account, a supervisor will have to enter their PIN and a comment to proceed.
- **DFPS Account?**: Indicate that the AR account is a DFPS account

When the appropriate check boxes are selected, press **Save AR**.

**Note**: The AR record will not be visible in the system until default contact information is added.

Once the user clicks **Save AR**, a message will appear indicating that the record was saved successfully:

![AR Saved Successfully Message](image)

Figure 130: AR Saved Successfully Message

After clicking **OK**, the **Contact Information** panel will be enabled.

To add new contact information, press **Add New**. This will generate the **AR Contact Information** window.

![AR Contact Information Window](image)

Figure 131: AR Registration Screen-AR Contact Information Panel
The fields available on the AR Contact Information screen include:

- First Name
- Middle Name
- Last Name *
- Suffix
- Address 1 *
- Address 2
- State *
- City / Town
- Zip
- Zip EXT
- Email
- Fax
- Phone
- Mail Code

To continue, enter all relevant information into the appropriate fields, then select Save.

Also note the two check boxes:

**Default Ship to Contact:** Makes the contact being entered the default contact for this AR account

**Invoice Contact:** Indicates that the contact will be the invoice contact.

![Figure 132: AR Contact Information Panel-Default Ship to Contact and Invoice Contact Checkboxes](image)

A confirmation message will appear, indicating that the information has been saved successfully. After selecting **OK**, the information will populate in the Contact Information panel.
From this point, there are four additional options.

1. Continue to add new contacts to this record as necessary.
2. Edit the existing contacts by highlighting the contact that needs to be edited and press **Edit**.

This will re-generate the **AR Contact Information** window where edits can be made to the contact.
3. **Delete** the contact from the record. Selecting **Delete** will cause a confirmation message to appear, asking for confirmation of the deletion.

![Figure 135: AR Registration Screen-AR Contact Information Panel](image)

Select **Yes** to delete the record, or select **No** to cancel the deletion, and return to the previous screen.

4. **Print Contact Information Listing** by selecting the **Print Contact Information Listing** button.

![Figure 136: Contact Delete Confirmation Message](image)

This will re-generate the **AR Contact Information** contents in a list in a new PDF window.

Once an AR record has been created and the contact information has been added, the record will be added to the **Account Receivable** work queue and become selectable from the **New Request Data Entry** screen.

### 9.2 AR Payment

The **AR Payment** screen can be accessed by going to **Functions / AR Payment**.

The **AR Payment** screen will then generate a blank record for users to begin submitting payments for AR accounts.

#### 9.2.1 Navigating the AR Payment Screen

The **AR Payment** screen is composed of several toolbars and two panels that will accept user input and selection.
Figure 137: AR Payment Screen

9.2.1.1 Information Toolbar

The Information toolbar displays the information associated with a specific account. Fields on the Information toolbar include:

- **AR#:** The number associated with the account
- **AR Name:** The name associated with the specific account.
- **Credit Limit:** The credit limit given to the specific account
- **Balance ($)**
- **Invoice Amount ($):** The amount of the current invoice being billed to the account.
- **Account Receivable Work Queue:** A drop-down menu that lists all of the accounts currently in the work queue.
- **Number of Records in Queue:** The number (located beside the Refresh icon) indicates the quantity of accounts in the work queue. The number will refresh in real-time, or by pressing the Refresh icon.

In addition to the toolbars and fields, there are also two panels:

- **AR Payment Information:** Displays all of the actions that a user can take in order to accept a payment to the account.
- **Unpaid Invoiced Transaction:** Provides information to the user about what invoices
are outstanding and need to be reconciled.

9.2.2 Making a Payment to an Account

Start by selecting a record from the **Account Receivable** work queue.

![Account Receivable Work Queue](image)

When the record is selected, the information will automatically populate into the appropriate fields.

*Figure 139: Account Receivable Work Queue*
Select a **Payment Type** from the drop-down field. Available options include:

- Cash
- Cashier Check
- Check
- Credit/Debit Card
- Electronic Funds Transfer
- Money Order
Note: Depending on the Payment Type selected, different fields will become mandatory fields.

- **Cash**: Amount Received
- **Electronic Funds Transfer, Cashier Check, Check, or Money Order**: Reference, Reference Date, and Amount Received
- **Credit/Debit Card**: Amount Received

For this example, select Cash as the payment type. Once Cash has been selected, enter all known information and a comment in the Payment Comments section, if applicable.

Note: When entering an amount into the Amount Received field, it cannot be greater than the total dollar amount in the Transaction Information panel.

Below, there are three transactions in the system. Two are for $10.00 and one is $3.75.
After entering the correct information, press **Apply Payment**.

![Figure 143: AR Payment Screen-Apply Payment Button](image)

If the record is saved successfully, the following message will appear:

![Figure 144: Payment Saved Successfully Message](image)

Click **OK**.

First, the **Information** toolbar will reflect an **Invoice Amount ($)** of $0.00, indicating that the account has been fully reconciled.

Also, the payments will be reflected in the **Invoice Information** panel and the **Amount Paid ($)** column will be populated with the dollar amounts applied to each specific item.

### 9.3 AR Invoice Generation

The **AR Invoice Generation** screen can be accessed by going to **Functions / AR Invoice Generation**.

The **AR Invoice Generation** screen will then generate a blank record for users to begin generating invoices for AR accounts.
9.3.1 Navigating the AR Invoice Generation Screen

The AR Invoice Generation screen is composed of three panels that will accept user input and selection.
The three panels are:

- **AR Group**: Allows for users to search for unpaid transactions for a specific AR Group type during a specific date range.
- **AR Information**: Displays contact information for all AR Groups in a specific AR type with unprinted invoices and allows for user to select AR Groups for which to generate invoices.
- **Pending Invoice Transaction**: Provides information to the user about what invoices need to be generated and allows for user to generate invoices or preview invoices.

### 9.3.2 Search AR

To search for a list of AR accounts for a specific AR group type with unprinted invoices, select the desired AR Group Type from the **AR Group** drop-down list and enter valid dates in the **Date From** and **Date To** fields before clicking the **Search** button.

The contact information for AR groups in the selected AR type with unprinted invoices for transactions in the chosen date range will populate in the AR Information panel:
9.3.3 Generate Pending Invoice Information

Once a user has executed a search for AR Groups with unprinted invoices, the user may then generate pending invoice information for one or more of the AR groups.

9.3.3.1 Generate Pending Invoice Information for all AR Groups

To generate pending invoice information for all of the AR groups, leave the checkmark in the Select column heading checked and click the Show Transaction button.

The invoice information for all pending invoices for all AR groups of the selected AR group type will be generated in the Pending Invoice Information section.
9.3.3.1.1 Generate Pending Invoice Information for selected AR Groups

To generate pending invoice information for selected AR groups, uncheck the checkbox in the Select column heading checked, click in the checkbox(es) for the desired AR group(s) and then click the Show Transaction button.

The invoice information for all pending invoices for the selected AR groups of the selected AR group type will be generated in the Pending Invoice Information section.
9.3.3.2 Generate Invoices

Once a user has generated pending invoice information, the user may then generate invoices for one or more of the AR groups.

9.3.3.2.1 Generate All Invoices for all AR Groups

To generate all invoices for all of the AR groups, leave the checkmark in the Select column heading checked in the Pending Invoice Information panel and click the Generate All button.

The following message will appear:
Click **Yes** to confirm the printing of the invoices. Clicking **No** will cause the message to close and the user will be returned to the previous screen.

If **Yes** is selected, the invoices will generate in a new PDF window.

9.3.3.2.2 Generate All Invoices for selected AR Groups

To generate all invoices for selected AR groups, uncheck the checkbox in the **Select** column heading checked, click in the checkbox(es) for the desired AR group(s) and then click the **Generate All** button.

The following message will appear:

Click **Yes** to confirm the printing of the invoices. Clicking **No** will cause the message to close and the user will be returned to the previous screen.

If **Yes** is selected, the invoices will generate in a new PDF window.
9.3.3.3  **Preview Invoices**
Once a user has generated pending invoice information, the user may then preview invoices for one or more of the AR groups.

9.3.3.3.1  **Preview All Invoices for all AR Groups**
To preview all invoices for all of the AR groups, leave the checkmark in the **Select** column heading checked in the **Pending Invoice Information** panel and click the **Preview** button.

![Pending Invoice Information Panel](image1.png)

Figure 157: Pending Invoice Information Panel-Select Checkboxes and Preview Button

The invoices will generate in a new PDF window.

9.3.3.3.2  **Preview All Invoices for selected AR Groups**
To preview all invoices for selected AR groups, uncheck the checkbox in the **Select** column heading checked, click in the checkbox(es) for the desired AR group(s) and then click the **Preview** button.

![Pending Invoice Information Panel](image2.png)

Figure 158: Pending Invoice Information Panel-Select Checkboxes

The invoices will generate in a new PDF window.
10 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.

While on the Fee Request Data Entry screen, select Functions / Search In Progress Records. The Search in Progress Vital Record screen will load, as pictured below.

![Search In Progress Vital Record Screen](image)

Figure 159: Search In Progress Vital Record Screen

10.1 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.
If a match is not found, the system will issue the following message:

![No records found for given search criteria.](image)

**Figure 161: No Records Found Message**

### 10.2 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:

![Do you want to email the selected record?](image)

**Figure 162: Email Selected Record Confirmation Message**
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:

![Image of notification message](image.png)

*Figure 163: Request Sent to State Message*
11 Fee Module Tools
From the Fee module, open the Tools drop-down menu on the Functions toolbar.

11.1 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.

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.

11.1.1 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.
11.1.2 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.

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.
11.1.3 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 icon.

The selected processes will then appear in the Assigned Print Processes panel.
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.
11.2 Reroute Work Queue Process
From the Fee Home page, go to Tools / Reroute Work Queue Process.

The Reroute Work Queue screen is divided into two panels, with three drop-down menus.

11.2.1 From User
The From User drop-down menu displays a list of all the users that process fee requests.

Once a user is selected from the From User drop-down menu, the From User Requests Assigned panel will be populated with the list of requests currently assigned to the user and the from User Requests Total will be populated with a number.
11.2.2 Allocation Indicator

The **Allocation Indicator** drop-down menu displays a list of all types of requests that can be allocated to fee users.

Once an allocation indicator is selected from the **Allocation Indicator** drop-down menu, the **To User** drop-down list will be filtered to include only those users with that indicator checked in their user account.
11.2.3 To User
The **To User** drop-down menu displays a list of all the users that process the type of fee requests selected in the **Allocation Indicator** drop-down list.

![Figure 174: To User Field](image)

Once a user is selected from the **To User** drop-down menu, the **To User Requests Assigned** panel will be populated with the list of requests currently assigned to the user and the To User Requests Total will be populated with a number. Additionally, the action icons will become visible between the **From User** panel and the **To User** panel.

![Figure 175: Reroute Work Queue Screen-To User Requests Assigned Panel](image)
From this point, the user will have the option to take several different actions: **Add Request for To User**, **Add Request for From User**, **Save**, **Add All Request for To User**, and **Add All Request for From User**.

### 11.2.4 Add Request for To User

In order to reallocate requests from the From User to the To User, hold down the CTRL key on the keyboard and click on the desired requests in the **From User Requests Assigned** panel to select them. Then click the **Add Request for To User** icon.

![Figure 176: Reroute Work Queue Screen-Adding Request(s) for To User](image)

The selected requests will be moved to the **From User Requests Assigned** panel.

Click the **Save** icon to save the changes.

If the changes are saved successfully, the following message will appear:

![Figure 177: Reroute WQ Request Successful Message](image)

### 11.2.5 Add All Requests for To User

In order to reallocate all requests from the From User to the To User, click the **Add All Requests for To User** icon.
All requests will be moved to the **To User Requests Assigned** panel.

Click the **Save** icon to save the changes.

If the changes are saved successfully, the following message will appear:

![Reroute WQ Request Successful Message](image)

### 11.2.6 Add All Requests for From User

In order to reallocate all requests from the To User to the From User, click the **Add All Requests for From User** icon.
All requests will be moved to the **From User Requests Assigned** panel.

Click the **Save** icon to save the changes.

If the changes are saved successfully, the following message will appear:

![Reroute WQ Successful Message](image)

11.3 **Transaction Price Rule**

From the Fee Home page, go to **Tools / Transaction Price Rule**.

![Transaction Price Rule Screen](image)
The **Transaction Price Rule** screen provides users with the ability to search for, edit and view the change history of transaction price rules.

### 11.3.1 Search in the Transaction Price Rule Screen

To search for transaction price rules, select values from one or more of the search drop-down lists.

![Transaction Price Rule Screen](image1.png)

**Figure 183: Transaction Price Rule Screen-Search Fields**

#### 11.3.1.1 Location

The Location drop-down provides a list of location types for which transaction price rules can be added.

![Location Field](image2.png)

**Figure 184: Location Field**

#### 11.3.1.2 Transaction Category

The Transaction Category drop-down provides a list of transaction categories for which transaction price rules can be added.

![Transaction Category Field](image3.png)

**Figure 185: Transaction Category Field**

#### 11.3.1.3 Transaction Type

The Transaction Type drop-down provides a list of transaction types for which transaction price rules can be added.

Click the Search button to load matching transaction price rules.

### 11.3.2 Edit a Transaction Price Rule

To edit a transaction price rule, click the **Add/Save Rule** icon in the Action column for the desired price rule.
Figure 186: Transaction Price Rule Screen-Add/Save Rule Icon

This will generate the **Transaction Price Rule Fund Distribution** window.

Figure 187: Transaction Price Rule Fund Distribution Window

The following fields are present in the **Transaction Price Rule Fund Distribution** window:

- **Date Applied**
- **Search+Copy1**
- **Copy2+More**
- **Fund Name**
- **Value Type**
- **Search + Copy1**
- **Copy2 + More**

First, select the **Date Applied** for the price transaction rule. You may complete this field by entering a date into the **Date Applied** field. You may also click the calendar icon next to the field and select a field from the calendar. The **Date Applied** allows users to select the date on which
the price transaction rule will become active.

11.3.2.1 Search + Copy1
Complete this field by entering in the price for executing the search for a record and the first certified copy of the transaction type.

11.3.2.2 Copy2+More
Complete this field by entering in the price for additional certified copies of the transaction type.

11.3.2.3 Fund Name
Complete this field by entering in the name of the fund that will receive the funds for the payment of the certified copies of this transaction type.

11.3.2.4 Value Type
This field contains selections of **Amount** and **Percentage**. Selecting **Amount** will allow for the user to indicate how much of the total dollar amount of the transaction will go to the fund named in the previous field. Selecting **Percentage** will allow for the user to indicate how much of the total percentage of the transaction cost will go to the fund named in the previous field.

To save the new price distribution rule, click the **Add** button.

The new transaction price rule will appear in the Transaction Price Rule Fund Distribution section of the screen.

If desired, add additional transaction price rules and then click the **Save** button.

The following message will appear:

![Figure 188: Record Saved Successfully Message](image)

11.3.3 View Change History of Transaction Price Rule
To view the change history of a transaction price rule, highlight the desired transaction rule and click the **View Change History** button.
This will generate the **Transaction Price Rule View Change History** window.

**11.4 Local Registrar Paper Inventory**

The **Local Registrar Paper Inventory** tool tracks the inventory of security paper shipped to local registrar offices.

To access the **Local Registrar Paper Inventory** tool, go to **Tools / Local Registrar Paper Inventory**.

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11.4.1 Add New Paper Shipment
First, select the **Form Name** that needs action.

Next, select the **Local Registrar** to which the paper was shipped.

Then, enter information into the **Starting Control #** field.

**Note:** If an existing **Starting Control #** is entered and a user tries to save the record, the following message will appear:

![Duplicate Control Number(s) Found Message](image)

Press **OK** to return to the previous screen.

**Note:** The **On Hand** field auto-generates.

Next enter information into the **Ship Date**, **Box #** and **Quantity** fields.

**Note:** Based on the quantity entered, the **Ending Control #** field will auto-generate.

When all fields have been resolved, click **Save**.

The following message will appear:
After the record has been saved, it will appear in the **Paper Inventory** panel.

![Record Saved Successfully Message](image)

**Figure 193: Record Saved Successfully Message**

If the entered information needs to be cleared, click the **Clear** button.

### 11.4.2 View Previously Entered Paper Shipment

To view previously entered paper shipments, select the desired Form Type and/or the desired Local Registrar from the drop-down menus located above the grid on the **Local Registrar Paper Inventory** screen.

![Local Registrar Paper Inventory Screen-Paper Inventory Panel](image)

**Figure 194: Local Registrar Paper Inventory Screen-Paper Inventory Panel**

Previously entered shipments for the selected Form Type and/or Local Registrar will be populated in the grid.

Select the desired entry to load the information in the Local Registrar Paper Inventory fields.

![Local Registrar Paper Inventory Screen-Search Fields](image)

**Figure 195: Local Registrar Paper Inventory Screen-Search Fields**
12 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 TxEVER system. The Email Configuration functionality will also allow for authorized users to edit the existing automated emails being sent from the TxEVER system.

12.1 Configure a New Automated Email
To configure a new automated email:

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

![Email Configuration Screen](image)

Figure 196: Email Configuration Screen

2. Complete the Subject field.
3. Being 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.
12.2 Edit an Existing Automated Email
To edit an existing automated email:

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

![Email Configuration Screen](image)

Figure 197: 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:
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.
13 Approvals

The undersigned acknowledge they have reviewed the TxEVER Fee Local User Guide and accept the contents herein written. Changes to this document will be coordinated with and approved by the undersigned or their designated representatives.

Signature: ___________________________ Date: ____________
Print Name: __________________________
Role: ________________________________

Signature: ___________________________ Date: ____________
Print Name: __________________________
Role: ________________________________

Signature: ___________________________ Date: ____________
Print Name: __________________________
Role: ________________________________

Signature: ___________________________ Date: ____________
Print Name: __________________________
Role: ________________________________

Signature: ___________________________ Date: ____________
Print Name: __________________________
Role: ________________________________