



Municipal Vital Records Request Service

Administrative Site User Guide

Table of Contents

Overview.....	3
1.0 User Login	4
2.0 Welcome Screen.....	5
3.0 Request Fulfillment	6
4.0 Print Shipping Labels.....	10
5.0 Transaction Report.....	11

Overview

The Maine Online Municipal Vital Records Request Service is a fast convenient way for citizens to request vital records.

The administrative website allows municipal staff to:

- Review and track requests and send status emails to customers
- Print shipping labels
- Access financial reconciliation reports

NOTE: Municipal records fees and USPS shipping fees will be automatically ACH'd to the bank account provided on a daily basis.

1.0 User Login

After receiving your emailed account information including user ID and temporary password, you will link to the administrative site and login for the first time. The system will require you to change your password on your first login attempt.

NOTE: Both your user ID and password are case-sensitive.

Before logging in or upon logging out, you may want to bookmark the administrative web address, for future use.

The screenshot shows the login interface for the Maine Municipal Vital Record Request Service. At the top, there is a header with the 'Maine.gov' logo on the left and 'Maine.gov Agencies | Maine.gov Services' on the right. Below this is a blue banner with the text 'Municipal Vital Records Ordering System' and 'PROVIDED IN PARTNERSHIP WITH THE INFORMATION RESOURCE OF MAINE'. The main heading is 'Maine Municipal Vital Record Request Service'. Underneath, there is a 'Log In' section. It includes the instruction: 'Please sign in by entering your username and password below and then click on the Log In button.' There are two input fields: '*Username:' and '*Password:'. Below the password field is a link for 'Forgot Password?'. A 'Log In' button is positioned below the fields. At the bottom of the login section, there is a red text warning: 'Important: Please refrain from using your browser's back button when navigating through this site.' The footer of the page contains 'Maine.gov | Site Policies | Accessibility Policy' on the left and 'Copyright © 2010 InforME All rights reserved.' on the right.

User Access:

This user ID and the password you choose can be shared with staff that will be reviewing and filling requests

With these credentials, staff will be able to access all functions within the Municipal Vital Records Request Service administrative site, as described in this user guide, including reviewing and tracking requests, sending status emails to customers, printing shipping labels, and accessing financial reports.

Passwords: If you have forgotten your administrator password please select the “Forgot Password?” link on the login screen of the administrative site to receive a new temporary password sent via email.

Login Security: It is very important that you safeguard your user login information. This information should not be shared with anyone not employed by your municipality or authorized to use the system. If you have any concern about the security of a user login, it is recommended that you change the password for that user account, by using the forgot password feature.

2.0 Welcome Screen

Once you have entered your user ID and password, you will be directed to your Maine Municipal Vital Records Request Service – Administrative Site Welcome Screen.

This home page will provide you with access to all of the administrative features, including Request Fulfillment, Bulk Print, and Reports.

The screenshot shows the administrative welcome screen for the Maine Municipal Vital Record Request Service. At the top left is the **Maine.gov** logo. To the right are links for **Municipal Contact Information**, **Maine.gov Agencies**, and **Maine.gov Services**. Below this is a dark blue header with the text **Municipal Vital Records Ordering System** and **PROVIDED IN PARTNERSHIP WITH THE INFORMATION RESOURCE OF MAINE**. The main title is **Maine Municipal Vital Record Request Service**. A personalized welcome message reads: **Welcome Dustin Biggs!** and **Not Dustin Biggs? Please Logout**. Below this are links for **Admin Home**, **Logout**, and **Flush Cache**. A message states: **Welcome to vital records request service administrative site. Please select a task from the list below. You must click on one of the links to continue.** A **Task Menu** section contains three icons: a magnifying glass for **Request Fulfillment**, a printer for **Bulk Print**, and a document for **Reports**. A red warning message says: **Important: Please refrain from using your browser's back button when navigating through this site.** The footer includes **Maine.gov | Site Policies | Accessibility Policy** on the left and **Copyright © 2010 InforME All rights reserved.** on the right. The version number **2.6.1** is located in the bottom left corner.

3.0 Request Fulfillment

This page will allow the admin user to search for and edit requests for your municipality (Search by date range, customer name, transaction number, certificate type, name of individual being searched or by status). The system defaults to display received requests. Select the “Clear” button to reset the search criteria. For a full list of results select “All” from the “Status” drop down menu to the right of TPE Order ID field.

To export search results from the table on the search screen, select “Export To CSV” button at the bottom of the page.

To review the full details of a particular request, select the “Confirmation Number” link to the left of the item.

ID Search

Confirmation Number TPE Order ID

Customer Search

Customer First Name Customer Last Name

Status Search

Standard Requests Priority Requests
 Status Type All

Certificates Search

Certificate Type Select First Name Last Name

Date and Time Range

Start Date Start Time Select AM

End Date End Time Select AM

Search Results

Search Results								
Confirmati	Processing Typ	Label	Customer	Customer	Order Date	Status Type	Certificate Type	Post
ME445059	Standard	Label	Becky	Benvenuti	6/16/2014 4:2	Completed	Marriage Certificate	USPS Fir
ME442050	Standard		Margaret	Cushing	6/12/2014 2:2	Authorizati	Death Certificate	USPS Fir
ME441062	Standard		Nathalie	Ray	6/11/2014 12:	Authorizati	Death Certificate	USPS Fir
ME441047	Standard		Nathalie	Ray	6/11/2014 12:	Authorizati	Death Certificate	USPS Fir
ME441024	Standard		Nathalie	Ray	6/11/2014 12:	Authorizati	Death Certificate	USPS Fir
ME436572	Standard		Dustin	Biggs	6/5/2014 1:41	Cancelled	Birth Certificate	USPS Fir
ME436566	Standard		Dustin	Biggs	6/5/2014 1:36	Received	Birth Certificate	USPS Fir
ME436564	Standard	Label	Dustin	Biggs	6/5/2014 1:34	Completed	Birth Certificate	USPS Fir
ME436561	Standard		Dustin	Biggs	6/5/2014 1:30	Received	Birth Certificate	USPS Fir
ME436559	Standard		Dustin	Biggs	6/5/2014 1:27	Received	Birth Certificate	USPS Fir

3.1 Request Details

The Request Details page will allow you to view, edit and update the request.

Customer Information

First Name: Dustin Middle Name: D Last Name: Biggs

Shipping Information (USPS First Class)

First Name: Dustin

Last Name: Biggs

Address 1: 18 Heather Lane

Address 2:

City: Wales

State: ME

Zip Code: 04280

Phone: (207) 621-2600

Email: Dustin@informe.org

Payment Information

First Name: Dustin

Last Name: Biggs

Address 1: 45 COMMERCE DRIVE

Address 2: SUITE 10

City: AUGUSTA

State: ME

Zip Code: 04330

Phone: (207) 621-2600

Email:

[Edit Shipping](#)

Status History

Status	Status Changed Date Time
Full Capture Completed	6/5/2014 1:40:30 PM
Received	6/5/2014 1:40:30 PM
Full Capture In Progress	6/5/2014 1:40:27 PM
ID Verification In Progress	6/5/2014 1:40:12 PM
Authorization Completed	6/5/2014 1:40:08 PM
Authorization In Process	6/5/2014 1:36:50 PM

Request Status: Received

Notes

Status Notes: Provide an explanation or comment related to the order status – this will be sent to the customer.

Note	Created By User	Created DateTime
------	-----------------	------------------

Staff Notes:

Note	Created By User	Created DateTime
------	-----------------	------------------

Include attachments

Payment Information

Certificate (# Copies)	Certificate Fees
Dustin Douglas Biggs (1)	\$15.00

To change shipping information select “Update Shipping” link under Shipping Method. After changes have been entered select “Save shipping” or “Cancel Update” link, to exit without saving changes.

3.1.1 Changing Request Status

To change the status of the request and/or add a note for the customer or for internal staff select the blue “Update” button under Staff Notes.

After selecting the “Update” button, you will see the editable fields.

You must confirm or cancel each request. Shipping labels will not be generated until you have confirmed (completed) the request. A confirmation email will be sent to the customer once the request has been either confirmed (completed) or cancelled, with any note you have added. Do not confirm any request until sufficient proof of relationship documentation has been received (if required).

NOTE: If you are unable to fill a request for any reason, you must set the status to “cancelled” and contact InforME about issuing a refund for the customer. The user’s credit card will not be refunded until you have done this. Refunding will also cause the town record fees and USPS shipping fees to be netted off a future disbursement.

Order Information			
Order Date:	3/23/2011	Confirmation Number:	ME2044
TPE Order ID:	1521055		
Customer Information			
First Name	Alfonzie	Middle Name	Last Name Dodson
Shipping Information		Payment Information	
First Name:	Alfonzie	Last Name:	Dodson
Address 1:	2123 16th St #6	Address 1:	2123 16TH ST #6
Address 2:		Address 2:	
City:	WINTER SPRINGS	City:	WINTER SPRINGS
State:	FL	State:	FL
Zip Code:	32708	Zip Code:	32708
Phone:	(207) 621-2600	Phone:	(207) 621-2600
Shipping Method:	USPS First Class	Email:	adodson@test.com
Update Shipping			
StatusHistory			
Status	Status Changed Date Time		
Received	3/23/2011 10:17:13 AM		
Request Status:	<input type="text" value="Received"/> <ul style="list-style-type: none"> Received Pending Completed Cancelled 	Do not confirm order until proof of documentation is received (if required)	
Notes	Status Notes: Provide a note or comment related to the order status – this will be sent to the customer.		
Note	User	Created DateTime	
<input type="text" value="Received"/>			
Insert:			
Staff Notes:			
Note	Created By User	Created DateTime	
<input type="text"/>			
Insert:			
<input type="button" value="CANCEL"/>		<input type="button" value="SAVE"/>	

Request Status options include:

- Received – request entered in the system
- Pending – request waiting for review
- Completed –all documentation has been received and approved and request has been filled and shipped
[NOTE: Customer receives automatic email about status change for completed requests]
- Cancelled – request cannot be filled and refund has been issued through admin site
[NOTE: Customer receives automatic email about status change for cancelled requests]

Status updates will be saved to the record by selecting “Save”. To exit out of the editable view without saving any changes select “Cancel”.

3.1.2 Adding a Status Note

Type a note related to the request for the customer or for internal staff in the boxes to the right of “Insert”.

Notes
Status Notes: Provide an explanation or comment related to the order status – this will be sent to the customer.

Note	Created By User	Created DateTime
Insert: <input type="text" value="This is where you add a note for the customer to see."/>		

Staff Notes:

Note	Created By User	Created DateTime
Insert: <input type="text" value="Please review the attached document and change status of order accordingly."/>		

Notes will be saved to the record and status note emails will be sent to the user by selecting “Save”. To exit out of the editable view without saving any changes select “Cancel”.

3.1.3 Issuing Refund

Unfortunately refunds cannot be issued directly through the application. Please contact InforME to have a refund issued to your customer.

3.1.4 View Uploaded Documents

To view supporting (proof) documents that have been uploaded select the “View” link to the right of the file name.

Supporting Documents

File Name	View
maine_gov_2008.tiff	<input type="button" value="View"/>

4.0 Print Shipping Labels

Print Labels

On the home screen for “Request Fulfillment” select the “Label” link next to the customer name. If the order is not appearing make sure you have “All” selected status search drop down and click submit. **(Note: This Link Will Only Appear if the Order Status has been Updated to Completed)**

ME436564	Standard	Label	Dustin	Biggs	6/5/2014 1:34	Completed	Birth Certificate	USPS Fir
ME436561	Standard		Dustin	Biggs	6/5/2014 1:30	Received	Birth Certificate	USPS Fir
ME436559	Standard		Dustin	Biggs	6/5/2014 1:27	Received	Birth Certificate	USPS Fir

A shipping label for that order will be generated in a PDF.

Town of Harrison

P.O Box 300

Harrison, ME 04040

To: Dustin D Biggs

18 Heather Lane

Wales, ME 04280

You can also generate shipping labels from the “Bulk Print” icon on your Welcome Screen. Here you will want to select the carrier type and select a completed on/fulfillment date and it will tell you how many labels are available and give you the option to generate them by clicking “Submit”.

Request Completed Date Carrier Type

1 labels have been found. Press submit to process.

Important: Please refrain from using your browser's back button when navigating through this site.

5.0 Transaction Report

Financial Reconciliation Reports

Select the “Report” icon from the Task Menu of the Welcome Screen (Admin Home).

[Admin Home](#) [Logout](#) [Flush Cache](#)

Welcome to vital records request service administrative site. Please select a task from the list below. You must click on one of the links to continue.

Task Menu

 Request Fulfillment

 Bulk Print

 Reports

Important: Please refrain from using your browser's back button when navigating through this site.

Maine.gov | Site Policies | Accessibility Policy

Copyright © 2010 InforME
All rights reserved.

2.6.1

You will then have the option to select the “Transaction Detail” report for the service

Reports

[Transaction Detail for Vital Records](#)

Important: Please refrain from using your browser's back button when navigating through this site.

Enter the Date of disbursement in the text box provided. The report is generated as a CSV file

Date Range

Note: Report is limited to a 1 to 31 day time period.

Start Date

End Date

Important: Please refrain from using your browser's back button when navigating through this site.

Select “Run Report” to generate report.

“Open” or “Save” file to computer file when prompted.

Report File includes: Requester Name, Confirmation #, Transaction Date, Disbursement Date, Disbursement Amount, Certificate Type, Certificate Total, Fulfillment Date, Postal Provider, Municipality and Status.

Sample Report

Requestor Name	Confirmation	Transaction Date	Disbursement Date	Disburseme Certificate Type	Certificate Total	Fulfillment Date	Postal Provider	Municipality	Status
Michael Nelson	ME20195	5/2/2014	6/5/2014	20.6 Birth Certificate	1	5/6/2014	USPS	Westbrook	Completed
Dominic Eramo	ME410038	5/3/2014	6/5/2014	15 Birth Certificate	1		USPS	Westbrook	Cancelled
Dominic Eramo	ME410038	5/3/2014	6/5/2014	-15 Birth Certificate	1		USPS	Westbrook	Cancelled
Karen Corvino	ME413871	5/8/2014	6/5/2014	15 Marriage Certificate	1	5/12/2014	USPS	Westbrook	Completed
			Total Disbursement Amount :	35.6					