

Local Office User Guide

VERS

VERS

Local offices User Guide

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Contents

Chapter 1 introduces you to VERS.

Chapter 2 presents information about different browsers that you may use, as well as when and how to request technical support.

Chapter 3 introduces you to the VERS dashboard.

Chapter 4 is reserved for later use.

Chapter 5 provides guidelines for searching for records.

Chapter 6 explains how to print documents including vault copies

Chapter

1

VERS: **Getting Started**

VERS

1 Introducing VERS

In this chapter

Regardless of whether you work with birth records, death records, marriage records, divorce records, ITOP records or customer orders there are **VERS** features that you will all see and use. This chapter explains what to expect when you start working in the **VERS** application and how to open the application.

Because the **VERS** system includes many modules (i.e., birth, death, etc.) this chapter may include references to and screen shots from multiple modules to best demonstrate application features. Specifically, this chapter contains the following topics:

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About VERS security

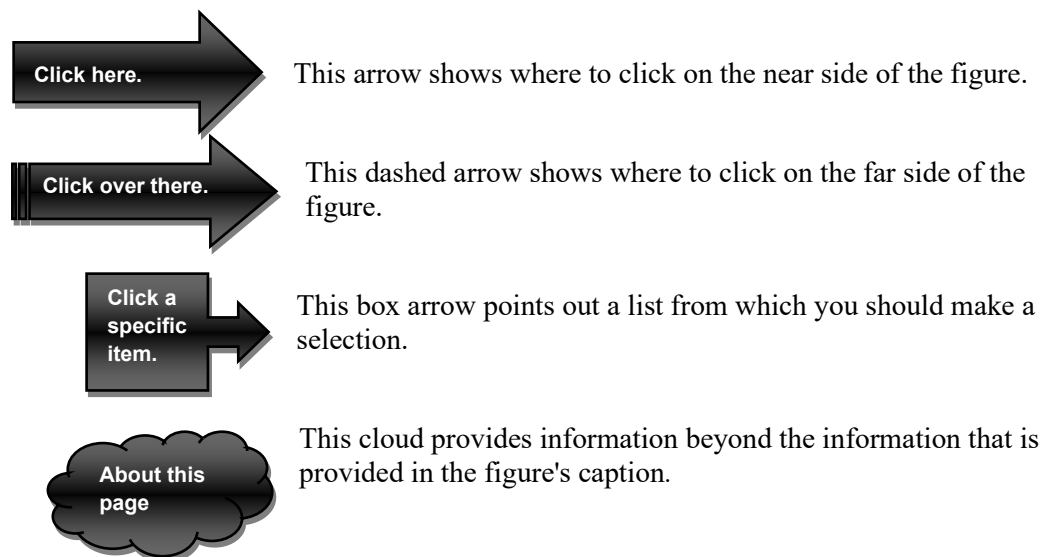
As you know, vital event records store important information. Because of this it is important that this information be protected. Protection begins each time you log in to the application. The logon procedure is designed to prevent unauthorized entry by others, as well as provide a way for you to recognize that the web site (**VERS**) you have launched is indeed the real **VERS** site.

Important: The security of any system depends on its built-in security features and the actions and reactions of its users. If you suspect unauthorized or inappropriate use of **VERS**, you should report it to the help desk.

About this user guide

This user guide is organized into chapters to provide information and instruction regarding **VERS** functionality that you may need to do your vital records work. Procedures in this guide are presented as numbered steps. They tell you how to open the page or record you need to complete a task. They assume that if you are filling in a form, you are starting from the first field of the first page and going to the last field on the last page. If this is not the case, you can move through the pages in any order. Either way, it is likely that you will not need these instructions very often.

Figures used in this guide generally only include the first page of the record. To provide supplemental information about these figures the following symbols are used:



Tips: It is good practice to always log out before leaving your work area, even if only for a moment!

If you are entering a record, you must return to the **VERS** Dashboard to access the **Logout** option after saving the record.


Security Alerts! After you logout, you should completely exit by closing all open browser windows.

If you do not log out, **VERS** may “time out.” Please refer to “System inactivity limits” on page 1-11 for more information about this feature.

Application conventions

To make it easier for you to enter information, the **VERS** application provides a variety of features that are used consistently throughout the application. These features include:

- **Required information:** Some information may be a mandatory requirement before you can continue to another field or process a transaction.
- **Protected information:** Field values that you are not able to modify appear in grey text.
- **Auto-populated information:** The application automatically populates some fields based on data you entered or selected in a previous field.
- **Application Messages:** The **VERS** application uses many messages to help guide you through your data entry. These messages may appear at the top of a data-entry record or in a separate window. For examples:
 - ◆ Some rules do not fire until you try to go to another page. Messages for these rules appear below the field.

Date of death (MMDDYYYY) 
⚠ Date of death is required.

- ◆ Some fields are required; that is, you must enter information in these fields before you can move to another field or save the record. If you try to skip these fields, messages will alert you to the problem. The following shows this type of message. Note that it has one button only—the **OK** button. You must click this button to return to the field where you must enter the requested information.

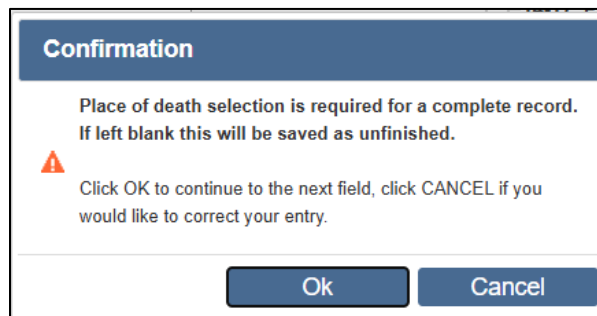
Alert

⚠ Decedent's Last Name is required. If not known, please enter Unknown.

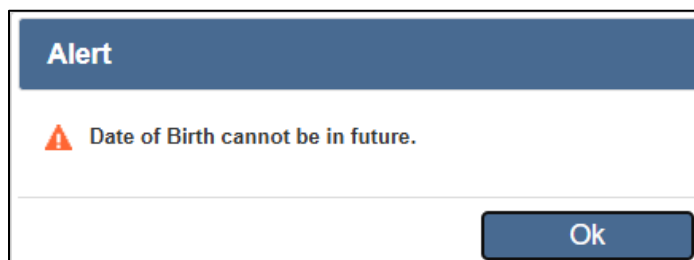
Ok

- ◆ Some fields can be left blank during the data entry process, but information must be entered before the system recognizes the record as being complete. The following shows this type of message. Note that this type of message has two buttons. Click **Cancel** to keep the cursor in the field so that

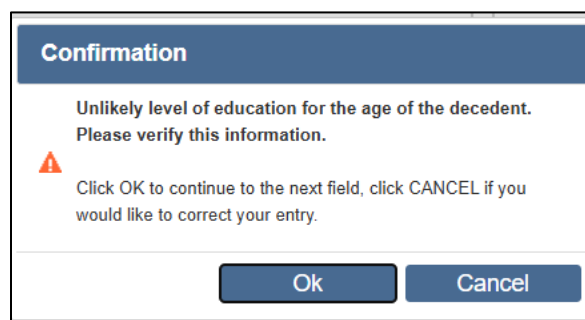
you can enter the information at this time or click **OK** to go to the next available field.



- ◆ Sometimes information you enter is an unacceptable entry, usually entered in error. In these cases, a message informs you that there is a problem. These messages have one button only—the **OK** button. You must click this button to return to the field where you must correct your entry.



- ◆ Sometimes information you enter is a questionable entry, which may have been entered in error. In these cases, a message informs you of the potential problem. This type of message has two buttons. Click **Cancel** to keep the cursor in the field so that you can correct the information or click **OK** to go to the next available field.



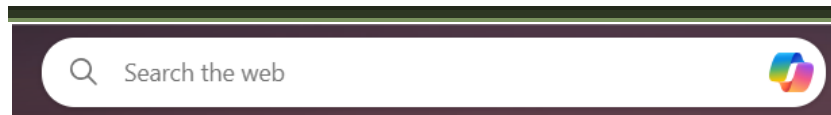
- **Tab Order:** As you enter information on any page, your cursor will move through the fields in a predetermined order. This order is called the tab order. You should use your **Tab** key to move forward through the fields and **Shift + Tab** to move backward. Using your **Tab** key is the recommended method of moving from field to field. This method allows for faster data entry than using a mouse to move the cursor.
- **Page Navigation:** You can enter data in order using the **Previous** and **Next** buttons or you can click on a tab to open pages in any order.

- **Cancel Button:** As with most applications, the **VERS** application has a **Cancel** button at the bottom of each page if you do not want to save your changes. Any previously saved information remains saved and unchanged in the database.

Launching VERS


You will receive the URL and OKTA information when you set up your account information with the state. After your account is set up and you have entered the security information required by OKTA, you be able to open the VERS application. To do so:

- Step 1** Enter the internet address (URL) that points to VERS.



Tip: To avoid entering the URL each time you want to login, you can create and use a browser bookmark.

- Step 2** Enter your username and password. Then click Sign in.

 MONTANA.GOV
OFFICIAL STATE WEBSITE

Sign In

FORMERLY EPASS MONTANA

Username

Password

☐ Keep me signed in

Sign in

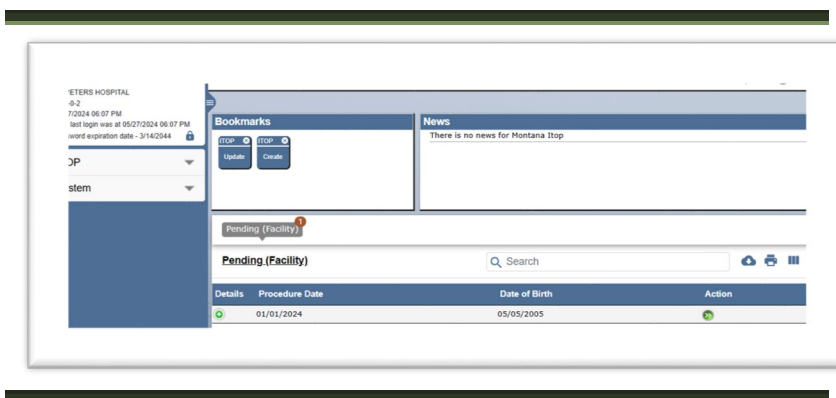
[Forgot password?](#)

OR

→ [Sign in with Employee Sign-...](#)

[Help](#)

Step 3 When you sign in, the VERS Dashboard opens. See Chapter 3 VERS Dashboard to learn more.



Data entry pages

When adding or modifying cases in any of the **VERS** modules (e.g., Death) you will notice that each data entry record has multiple pages. Each page of the record contains multiple fields categorized into sections as shown in the following figure.

Page

6. Birthplace

☐ Unknown place of birth

Country

State/Province

City

7. Decedent's Residence

Complete number and street

Country

State/Province

County

Total reservations

Name of reservation

City

City or town

Zip code

Inside city limits?

8. US Armed Forces

Was decedent ever in US armed forces?

9. Marital Status at Time of Death

Marital status

Verification required

10. Surviving Spouse's Name

☐ Unknown

First

Middle

Last

Suffix

11. Father's Name

☐ Unknown

First

Middle

Last

Suffix

12. Mother's Name

☐ Unknown

First

Middle

Last name before first marriage

Suffix

Previous Next Finish Cancel

Section

9. Marital Status at Time of Death

Marital status

Verification required

Field

Was decedent ever in US armed forces?

Figure 1-1 Page - Section - Field Relationships: A record may contain multiple pages; each page may contain multiple sections; and each section may contain multiple fields.

Page tips

Note the following when entering information in the **VERS** records:

- You can open a page by clicking the page's name in the left menu panel or by clicking the **Next** button to move forward through the pages or the **Previous** button to move back a page.
- If you do not see a page, it may be hidden. In some cases, a page only opens if the information requested on that page is pertinent to the record you are working on. For example, you may not see a page to enter AKA/aliases unless you have indicated that there are AKA/aliases associated with the record.
- You will be required to correct certain types of errors before you can continue.
- You will be reminded to enter information required for saving a complete case and what to enter if an actual value is unknown.
- The selections you make in drop-down lists (e.g., state) may determine what appears in subsequent drop-down lists (e.g., county).
- Remember to click the **Finish** button to save your work.

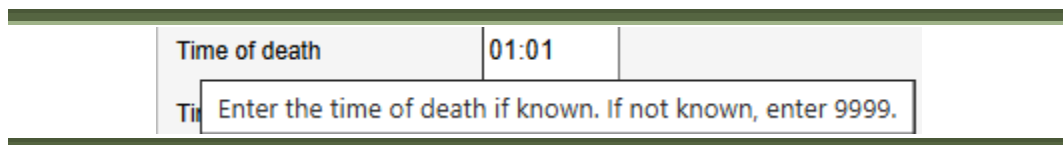
Keyboard Shortcuts

You can use your keyboard to make data entry faster. Below are some tips that you may or may not already know.

- Press your **Tab** key to move forward.
- Press your **Shift + Tab** keys to move back.
- Checkbox: Use your **spacebar** to select or deselect.
- Press your **Alt + T** keys to insert the current date (without having to type it in manually).
- Drop-down list: Begin typing your selection until the list jumps to that selection.
- Press your **Alt + N** keys to open the next page of the form.
- Press your **Alt + P** keys to open the previous page of the form.
- Press your **Alt + Page Up** keys to open the first page from any other page of the form.
- Press your **Alt + Page Down** keys to open the last page of the form from any other page of the form.
- Press your **Alt + ↓** keys to “open” a list box.
- Press your **Ctrl + F** keys to specify text you want to find on a page.

Help/Field definitions

If you are unsure as to what information goes in a particular field, position the cursor over the field label (e.g., First name) When you hold the cursor over the label, no clicking necessary, you will see hover text appear as to what type of information you should enter in that field.



The screenshot shows a form with a field labeled "Time of death" containing the value "01:01". A tooltip box is displayed below the field with the text: "Enter the time of death if known. If not known, enter 9999."

Figure 1-2 Sample Field Definition: This shows the hover text or tool tips for a field. It appears when you move the mouse over the field label.

Duplicate record alert

Whenever you start a record, the system performs a duplicate record check. The purpose of this is to identify record(s) that potentially match the one you are entering so that you are not duplicating your work effort and to avoid the need to cancel records. If no match is found, the full form opens so you can continue filling out the form.

If the system finds such a record, a potential duplicate record warning will be displayed.



The screenshot shows a "Records List (Showing 1 - 1 of 1 records)" table. A yellow arrow points to a "Create New Case" button in the top right corner. The table has columns: Last Name, First Name, Date of Death, County of Death, Sex, Funeral Home, Certifier Location, SFN, Reg, Action for FH, and Action for MC. The first row shows a record for "ROBINS, JAMES" with date of death "01/01/2025" and certifier location "LEWIS AND CLARK COUNTY CO...". The "Action for MC" column contains a double arrow icon. Below the table are buttons for "Create New Case" and "Exit".

Figure 1-3 Sample Duplicate Information Warning: This message informs you that the record you are entering may already exist. If it is already in the system, you do not need to re-enter it.

Notice the Action for MC column. If the record listed is already one of your location's records, you can click the double arrow to open the record. Or if you know that it is not the same as the one you just started to create you can click **Create New Case**. If you are not sure if it is a duplicate, you can click **Exit** and investigate further to determine if you are trying to enter a duplicate record.

If the record shown does not belong to your location, you will not see a double arrow. The location that owns the record is shown in the Certifier Location column. If you know that it is not the same as the one you just started to create, you can click **Create New Case**. If you are not sure if it is a duplicate, you can click **Exit** and investigate further to determine if you are trying to enter a duplicate record.

Logging out

Before you get started you should know how to get out of the system once you are in it. You should always use the **Logout** option upper right-hand corner of the **VERS** Dashboard.



Note: Besides logging out to exit the application, you should always log out before leaving your work area, even if only for a moment!

Security Alert! After logging out, you should always close all open Internet Browser windows to completely exit the application.

System inactivity limits

If you are working in the **VERS** system and are not actively entering information or navigating the menu for an extended period, your session may be terminated. This feature is included for extra security in the event your **VERS** work is interrupted and you have not logged out of the system. If you have an open case, you will be notified before the application closes to give you the opportunity to continue work (Figure 1-4).

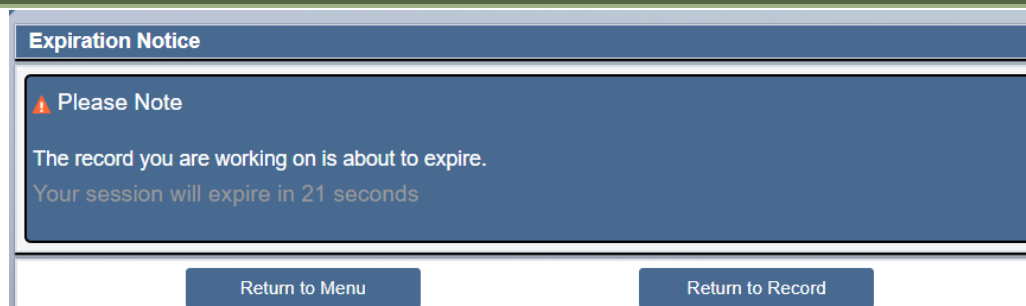


Figure 1-4 Sample VERS Expiration Notice: This alerts you that you are about to be logged out of the system and allows you to continue your current task.

If you notice the above **VERS Inactivity Timeout** message and want to continue working in the **VERS** application, click the **Return to Record** button. If you miss this opportunity, the application will close the open record automatically (Figure 1-5). If you miss this opportunity to keep the application open, you will have to log back in to resume work in the **VERS** system. Note that if this happens you may lose the information entered if you did not save it.

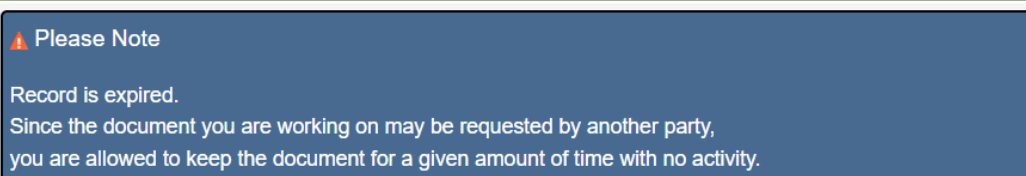


Figure 1-5 Sample VERS Inactivity Timeout Message: This alerts you that your session timed out.

Chapter

2

Technical Support

VERS

2 Technical Support

In this chapter

This chapter explains what to do if you encounter problems when using the **VERS** application. If you are still having problems after trying the recommended resolution, or if you are not comfortable implementing any of the recommended resolutions, you should refer to “About technical support for VERS” starting on page 2-5 or contact your **VERS** help desk at 406-444-9500.

Note: You should call the help desk (406-444-9500) if you need to reset your password (OKTA).

Specifically, this chapter contains the following topics.

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Technical requirements

The **VERS** application is designed for viewing and use on a standard high-resolution color monitor with the screen display set to (at least) 800 X 600 pixels. Screen resolutions at less than 800 X 600 (for example, 600 X 480) will enlarge the pages, buttons and fields, but may make navigation through the application more difficult (more scrolling).

Higher resolutions are acceptable. Higher resolution will not change functionality and you will be able to view more information on some pages, but text and images will appear much smaller and may be difficult to read.

To run the **VERS** application and print your documents you need to have downloaded/installed an internet browser. The recommended browsers are Edge, Firefox and Chrome.

These browsers are available at no cost via the internet. If one of these browsers is not already installed, go to <https://www.mozilla.org/en-US/firefox/new/>, <https://www.google.com/chrome/> or <https://www.microsoft.com/en-us/edge> and follow their instructions for downloading their product. Contact your helpdesk for further assistance

Prerequisites for browser configuration

If you experience problems with how VERS works in your browser, especially when printing, please check the items listed in this section. If you need more information about checking and/or changing browser settings, please contact your IT department or help desk. The following information is provided as a guideline: The way to make the suggested adjustment depends on your browser type and version.

Add application URL to browser trusted sites

Your VERS website's URL should be added to your browser's list of trusted sites. The way to set this up depends on your browser. Find your browser below and follow the steps for that browser.

Note: You may need to have your local IT department set the URL as a trusted site on the network.

Microsoft Edge

- 1) Search in the **Start Menu** for the **Control Panel**.
- 2) Click or double-click the **Internet Options** icon.
- 3) In the *Internet Properties* window, click the **Security** tab.
- 4) Select the **Trusted sites** entry and click the **Sites** button.
- 5) Enter the URL for your **VERS** website in the **Add this website to the zone** text field.
- 6) Click the **Add** button, then click **OK** to save the website addition.

Mozilla Firefox

- 1) Click the menu icon in the upper right-hand corner of the browser.
- 2) Click **Options**.
- 3) Click **Privacy and Security**.
- 4) Scroll down to the "**Permissions**" section and click on **Exceptions** to the right of "Warn you when websites try to install add-ons."
- 5) Type the URL for your **VERS** website into the "Address of website" field.
- 6) Click **Allow**.
- 7) Click **Save Changes**.

Google Chrome

- 1) Click the Chrome **Menu** icon on the far right of the **Address bar**.
- 2) Click on **Settings**, scroll to the bottom and click the **Show Advanced Settings** link.
- 3) Click on **Change proxy settings** (under **Network**)
- 4) Click the **Security** tab > **Trusted Sites** icon, then click **Sites**.
- 5) Type the URL for your **VERS** website, then click **Add**.
- 6) Click **Close** > **OK**.

Safari

- 1) At the top of the screen, click **Bookmarks**.
- 2) Click "**Add Bookmark...**"
- 3) Click "**Top Sites**" from the dropdown menu.
- 4) Click **Add**.
- 5) Type the URL for your **VERS** website, then click **Add**.

iPad

- 1) Go to Settings app on the iPad
- 2) Select '**SCREEN TIME**'
- 3) Select '**Content & Privacy Restrictions**'
- 4) Make sure **Content & Privacy Restrictions** is toggled (in Green), then select **Content Restrictions**.
- 5) Select '**Web Content**'
- 6) If your restrictions are set to "Limit Adult Content", then click on the Add Websites button to enter the URL for your **VERS** website.

PDF opens in the same browser window

The documents you generate should open in a new window. If they do not, contact your local IT support group or call the Help desk.

About technical support for VERS

Your **VERS** help desk team can provide assistance in a variety of areas. You can help them help you by knowing when to ask for help and what information will help them help you.

When to request technical support

You may experience a situation where some part of the application is not doing what you want it to do or think it should do. This may be due to a configuration problem as explained in “Prerequisites for browser configuration” starting on page 2-3 or “PDF opens in the same browser window” on page 2-5. If not listed or if you still have problems, you should contact your local IT Support or your **VERS** help desk. Problems can fall into the following categories:

- Connectivity – These problems prevent you from accessing the **VERS**. Entry page or from successfully logging into the **VERS** system. You can check this by trying to access a different website. If you cannot access another website, then contact your Local IT. If the connection to **VERS** is lost, try pressing **F5** to refresh the page.
- Hardware – These would be problems with your computer, mouse, keyboard or printer. (Printing problems may also be application problems.) Please contact your Local IT.
- Application usage – These problems arise because you are uncertain how to use the application.
- Application problems or "bugs" – These problems are the ones where the application is not performing the way in which it should. For example, you can't save a record for which you have entered all required information.
- Database – These problems can result in unexpected Oracle (database) errors.

Note: Most Connectivity and Hardware problems will be the responsibility of your local IT Support, for other categories please contact your **VERS** help desk. Depending on the nature of your problem, it could be “fixed” immediately, or it may take a while to reproduce the problem, identify the cause, correct the problem, and release another version.

How to request VERS technical support

If you encounter a problem that requires technical support, you should contact your **VERS** help desk. If a support officer is not available or if you call outside of the regular business hours (9:00 to 5:00 Monday-Friday) you should leave a message. If this

happens, leave your name and telephone number and a help desk team member will return your call as soon as possible.

What to expect from technical support

When you talk to a help desk team member, you may be asked a variety of questions concerning how to contact you and the nature of the problem. The more information you can provide in response to these questions, the easier it may be to determine the cause of the problem and, therefore, the way to correct the problem.

- Information about you:
 - Your name
 - Where you work
 - Your telephone number
 - Your job role (why you access **VERS**)
- System information
 - Browser name and version
 - Which **VERS** module/function you were using when the problem occurred
- Problem information
 - Describe the problem, giving as much detailed information as possible including the sequence of actions prior to the problem.
 - Are there any error messages?
 - Have you been able to complete the task successfully in the past?
 - Have you experienced this problem before?
 - Can you recreate the problem?

Chapter

3

VERS

Dashboard

VERS

3 VERS Dashboard

In this chapter

This chapter provides an overview of the “look and feel” of the VERS dashboard. Note that the screen shots show what a funeral director sees; however, the processes described are the same regardless of your user role.

Dashboard (See Dashboard (Home Page) on page 3-3)

The VRVCloud dashboard has many features. This document shows answers to the following:

- Where are the menu options? See “Dashboard Navigation panel” on page 3-3.
- Do I always have to select a menu option? See “Add/remove bookmarks” on page 3-4.
- How can I access helpful information? See “Other actions” on page 3-4.
- How can I change my location if I am a multiple-location user? See “Other actions” on page 3-4.
- How do I log out? See “Logout” on page 3-5.
- Where is the news message panel? See “News” on page 3-5.
- What is the purpose of the icons in the queue panel, and how can I use them? “See Work Queues” on page 3-5.

Create New Record

- How do I start the process of creating a new record? See “Create a record” on page 3-9.
Note: you will only see this option if your user role allows you to create records.

Update a Record

- How do I start the process of updating a record? See “Update a record” on page 3-10.

Search Results

- What is the purpose of the icons on the search results panel, and how can I use them? See “Search Results Page” on page 3-11 for a look at the search results page and See “Work Queues” on page 3-5 for information about icons and how to use them.

Record Data Entry Pages

See “Record data entry pages” on page 3-12 to see how you can return to the dashboard or logout.

See “Screen navigation panel” on page 3-13 for answers to the following.

- Can I see what sections are on a page without opening each page?
- Can I see what fields are in a section without opening the page?

Dashboard (Home Page)

Funeral-Director Montana
COLUMBIA FUNERAL HOME
RLS-0-2
10/30/2024 02:50 PM
Your last login was at 10/30/2024 02:50 PM
Password expiration date - 1/24/2044

Death

Montana Vital Records

Bookmarks
No Bookmarks marked yet!!!

News
There is no news for Funeral-Director Montana

Missing Demographic Info **Unassigned Medical Certifier** **Missing Medical certification**

Missing Demographic Info

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
	ASDF	ASDF	10/15/2024			N	

1 to 1 of 1 Rows per page: 25

Dashboard Navigation panel

Expand/collapse the menu

Click items with arrows to expand and collapse the menu.

RETZ FUNERAL HOME AND CREMATORY
RLS-0-2
10/29/2024 11:21 AM
Your last login was at 10/29/2024 11:21 AM

Death

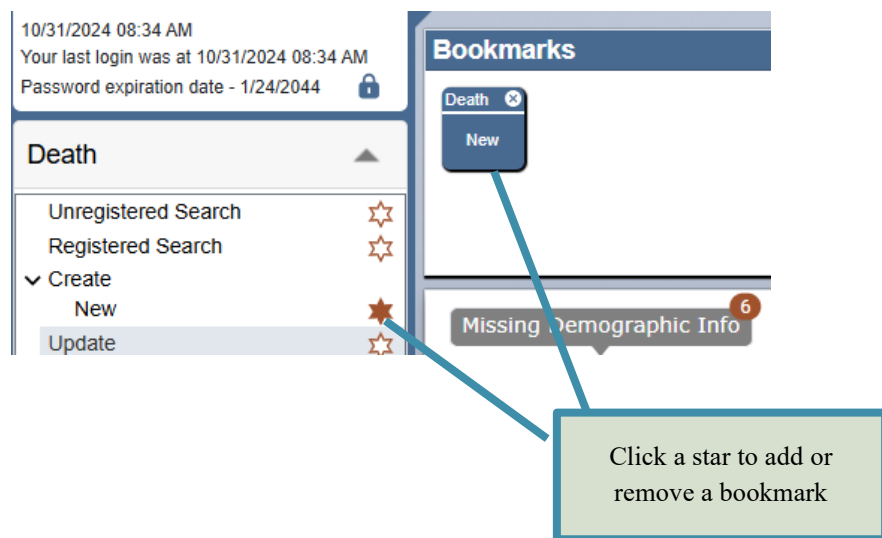
Click items with arrows to expand and collapse submenus.

Death

- Unregistered Search
- Registered Search
- ✓ Create
- New
- Update
- > Maintain
- > Modify
- > Print

Add/remove bookmarks

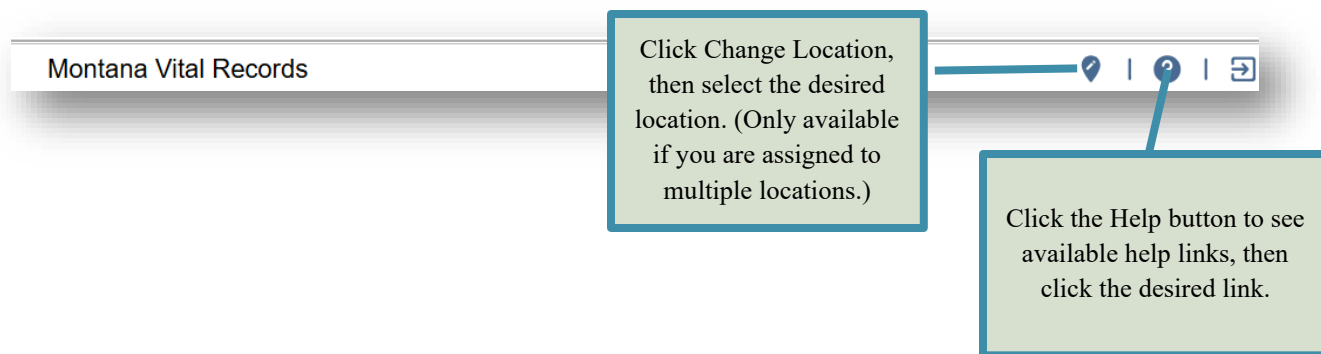
Bookmarks can be used instead of the navigational panel.



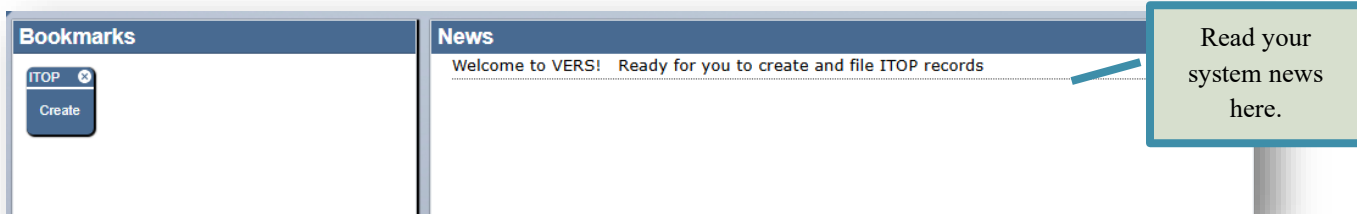
Hide/show navigation panel



Other actions



News



Bookmarks

ITOP

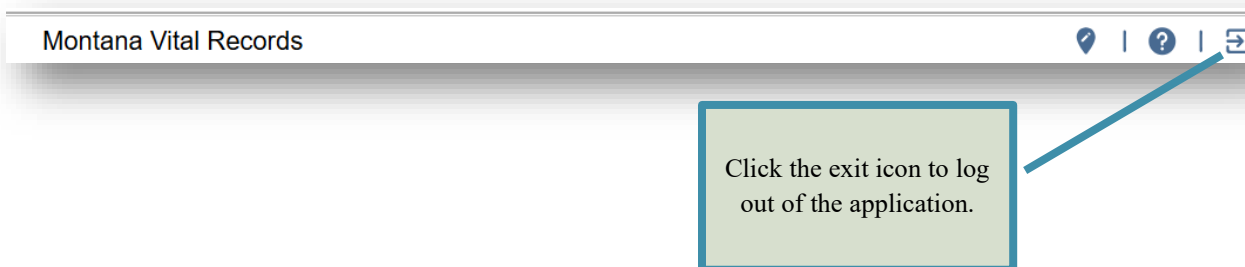
Create

News

Welcome to VERS! Ready for you to create and file ITOP records

Read your system news here.

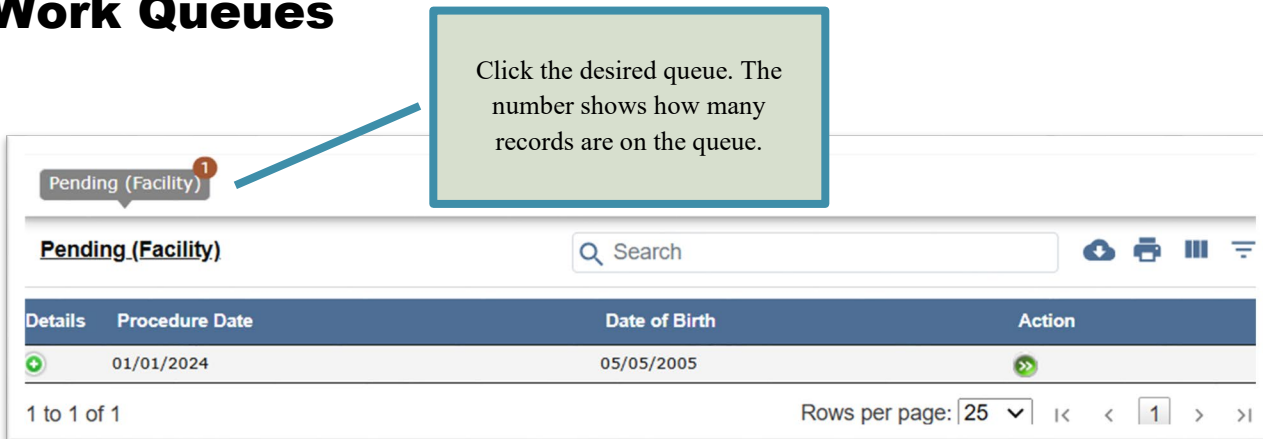
Logout



Montana Vital Records

Click the exit icon to log out of the application.

Work Queues



Click the desired queue. The number shows how many records are on the queue.

Pending (Facility) ¹





Pending (Facility)



Details	Procedure Date	Date of Birth	Action
	01/01/2024	05/05/2005	

1 to 1 of 1 Rows per page: 25 < > 1 >

Show/hide additional record details

Missing Demographic Info ⁶ Missing Medical certification ³ Approve ¹ Declined Record ² Missing State Approval ⁵

Approve    

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
	JILL	JACK	10/01/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	

1 to 1 of 1 Rows per page: 25 < 1 >

Click the plus sign to show additional record details.

Click the minus sign or the Close button to hide the details.

Details	Last Name	First Name	Date of Death	Funeral Director	Certified
	JILL	JACK	10/01/2024	JOHN KRAKE	COMMUNITY HEALTH CARE Y

Additional Record Details

First	JACK	Date of death (MM/DD/YYYY)	10/01/2024
Last	JILL	Date of birth (MM/DD/YYYY)	02/18/1989
State comments	History 10/18/2024 User 1050002 created record -- 10/18/2024 User ID 1050002 assigned case to MONTGOMERY PAUL at COMMUNITY HEALTH CARE -- 10/18/2024 User ID 1050002 assigned case to MONTGOMERY PAUL at COMMUNITY HEALTH CARE		

Close Process

Click process to update the record.

Search for a record on the queue

Start typing what you want to find.

Missing Demographic Info

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
▶	DEC-LNAME	DEC-GNAME	08/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	▶▶
▶	PRONOUNCER	CHECK	10/14/2024		COMMUNITY HEALTH CARE	N	▶▶

1 to 2 of 2 (filtered from 6 total entries) Rows per page: 25 |< < 1 > >|

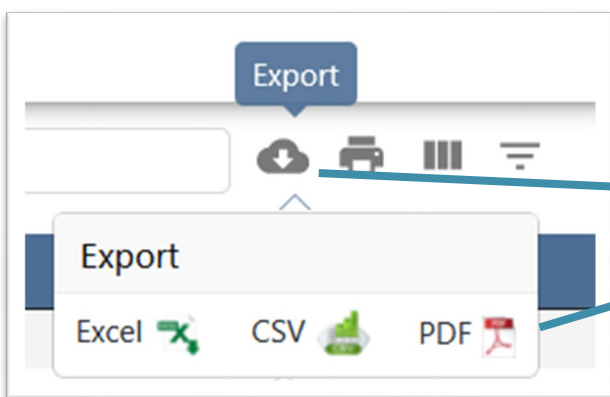
Export queue contents

Missing Demographic Info **3** Missing Medical certification **3** Approve **1** Declined Record **2** Missing State Approval **0**

Missing Demographic Info

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
▶	MOUSE	MICKEY	07/19/2024	JOHN KRAKE	BEAVERHEAD COUNTY CORONER	Y	▶▶
▶	BUG	BIG	07/26/2024	STAN HARDING	COMMUNITY HEALTH CARE	Y	▶▶
▶	DEC-LNAME	DEC-GNAME	08/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	▶▶
▶	STARTED	CORONER	09/23/2024		BEAVERHEAD COUNTY CORONER	N	▶▶
▶	PRONOUNCER	CHECK	10/14/2024		COMMUNITY HEALTH CARE	N	▶▶
▶	COLD	NOTSO	10/29/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	▶▶

1 to 6 of 6 Rows per page: 25 |< < 1 > >|



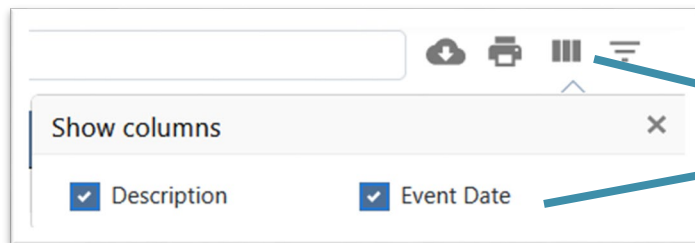
Click the export icon, then click the desired file type.

Print queue content

Click the print icon to begin the print process.

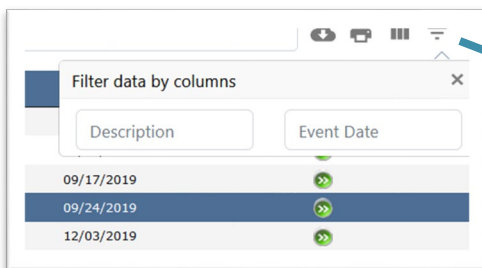


Change displayed columns

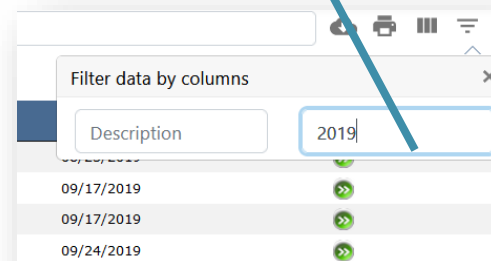


Click the columns icon, then check the desired columns.

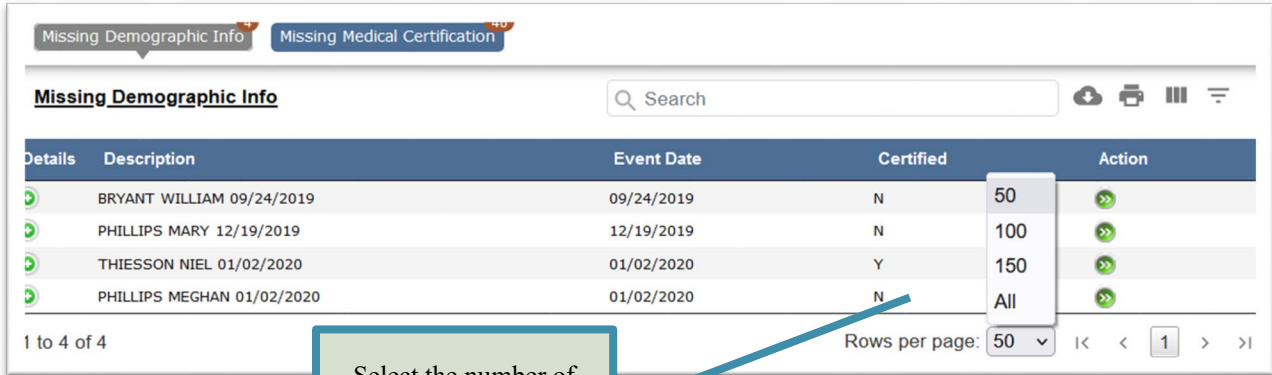
Filter records



Click the filter icon, then enter the filter value.



Adjust number of rows to show



The screenshot shows the 'Missing Demographic Info' section of the VERS dashboard. It features a table with columns: Details, Description, Event Date, Certified, and Action. The table contains four rows of data. A dropdown menu is open next to the 'Certified' column, showing options for '50', '100', '150', and 'All'. The 'Rows per page' label is visible at the bottom right of the table.

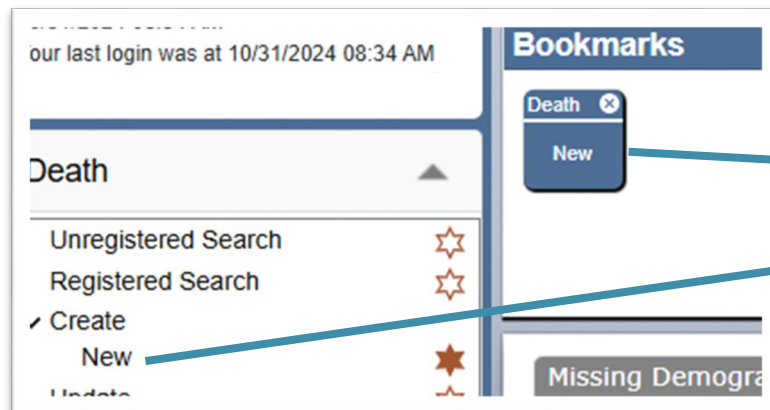
Details	Description	Event Date	Certified	Action
▶	BRYANT WILLIAM 09/24/2019	09/24/2019	N	▶▶
▶	PHILLIPS MARY 12/19/2019	12/19/2019	N	▶▶
▶	THIESSON NIEL 01/02/2020	01/02/2020	Y	▶▶
▶	PHILLIPS MEGHAN 01/02/2020	01/02/2020	N	▶▶

1 to 4 of 4

Rows per page: 50

Select the number of records to show on the same page.

Create a record



The screenshot shows the 'Death' section of the VERS dashboard. It includes a sidebar with options: 'Unregistered Search', 'Registered Search', 'Create', 'New', and 'Update'. The 'New' option is highlighted. A 'Bookmarks' section is visible on the right, showing a 'Death' bookmark with a 'New' button.

Click the Create Bookmark if it is available or the Create New menu option.

Update a record

Use Update menu option or bookmark or select record from the Queue.

Missing Demographic Info							
Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
+	MOUSE	MICKEY	07/19/2024	JOHN KRAKE	BEAVERHEAD COUNTY CORONER	Y	➡
+	BUG	BIG	07/26/2024	STAN HARDING	COMMUNITY HEALTH CARE	Y	➡
+	DEC-LNAME	DEC-GNAME	08/14/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	➡
+	STARTED	CORONER	09/23/2024	BEAVERHEAD COUNTY CORONER	BEAVERHEAD COUNTY CORONER	N	➡
+	PRONOUNCER	CHECK	10/14/2024	COMMUNITY HEALTH CARE	COMMUNITY HEALTH CARE	N	➡
+	COLD	NOTSO	10/29/2024	JOHN KRAKE	COMMUNITY HEALTH CARE	Y	➡

Click the plus sign to show additional record details, then click the Process button.

Or...

Click the double arrow Action icon.

Additional Record Details			
First	BIG	Date of death (MMDDYYYY)	07/26/2024
Last	BUG	Date of birth (MMDDYYYY)	01/01/1940
State comments	History		
	07/26/2024 User 1050002 created record -		
	- 07/26/2024 User ID 1050002 assigned case to		
	COMMUNITY HEALTH CARE - TACOMA --		
	07/26/2024 User ID 1050002 assigned case to		
	COMMUNITY HEALTH CARE - TACOMA --		
	09/23/2024 User ID 9 unapproved case		
		Close	Process

Search Results Page

Records List (Showing 1 - 7 of 7 records)

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Record ID	Last Name	Mid Name	First Name	Date of Death	Disposition Date	Demographic Status	Cause Status	Manner	Date Created
L1726770	STARTED		CORONER	09/23/2024		Case pending	Case pending		09/24/2024...
L1841770	JILL		JACK	10/01/2024	10/22/2024	Ready for appro...	Certified	Natural	10/18/2024...
L1821769	PRONOUNCER		CHECK	10/14/2024		Case pending	Case pending	Natural	10/14/2024...
L1816769	SEND		DONT	10/14/2024		Approved	Certified	Natural	10/14/2024...
L1881772	JONES		JAMES	10/23/2024	10/25/2024	Approved	Certified	Natural	10/28/2024...
L1891769	COLDER		EVEN	10/28/2024	10/28/2024	Approved	Certified	Natural	10/28/2024...
L1896769	COLD		NOTSO	10/29/2024		Case pending	Certified	Natural	10/30/2024...

1 to 7 of 7

Rows per page: 25 |< < 1 > >|

Cancel

See “To Do Queues” on page 3-5 for information about these features.

Records List (Showing 1 - 7 of 7 records)

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Record ID	Last Name	Mid Name	First Name	Date of Death	Disposition Date	Demographic Status	Cause Status	Manner	Date Created
L1726770	STARTED		CORONER	09/23/2024		Case pending	Case pending		09/24/2024...
L1841770	JILL		JACK	10/01/2024	10/22/2024	Ready for appro...	Certified	Natural	10/18/2024...
L1821769	PRONOUNCER		CHECK	10/14/2024		Case pending	Case pending	Natural	10/14/2024...
L1816769	SEND		DONT	10/14/2024		Approved	Certified	Natural	10/14/2024...
L1881772	JONES		JAMES	10/23/2024	10/25/2024	Approved	Certified	Natural	10/28/2024...
L1891769	COLDER		EVEN	10/28/2024	10/28/2024	Approved	Certified	Natural	10/28/2024...
L1896769	COLD		NOTSO	10/29/2024		Case pending	Certified	Natural	10/30/2024...

1 to 7 of 7

Rows per page: 25 |< < 1 > >|

Cancel

Record data entry pages

Click the Home icon to return to the Dashboard. If you click this while in the record, your changes will not be saved.

Funeral-Director Montana
RETZ FUNERAL HOME AND CEMETERY
RLS-0-2
10/31/2024 09:40 AM
Your last login was at 10/31/2024 09:40 AM

Montana Vital Records

Death -- First:NOTSO Last:COLD Date of death (MMDDYYYY):10/29/2024 Signed by:PAUL MONTGOMERY, MD Death - Update

Edit Information

☐ Un-certify and edit Medical Information **EDIT MI**

☐ Un-sign and edit Personal Information **EDIT PI**

☐ ME/coroner acting as funeral home

1. Decedent's Legal Name

First: NOTSO

Middle:

Last: COLD

Suffix: Select

Does decedent have AKAs? No

☐ Prefer parent/parent

2. Decedent's Sex

Sex: MALE

3. Decedent's Social Security Number

SSN: 999-99-9999

Reason not available: None

Previous Next Finish Cancel

Navigation panel.

Click buttons to navigate between pages, or to save (Finish) or Cancel your changes.

Screen navigation panel

Click to open a page.

1 Decedent	▶
2 Case Assignment	▼
3 Decedent Info I	▼
4 Decedent Info II	▲
> 51. Decedent's Education	
> 52. Decedent's Hispanic Origin	
> 54. Decedent's Occupation	
> 55. Kind of Business/Industry	
> 53. Decedent's Race	
5 Informant/Disposition/Funeral Home	▼
6 Certifier/Pronouncer	▼
7 Cause of Death	▼
8 Manner of Death	▼
9 Injury Info	▼

Click arrows to show or hide the sections on the page.

Chapter

4

**Reserved for
Future Use**

VERS

4 Reserved for Future Use

To be added when the Customer Service (including issuance) is available

VERS

Chapter

5

-Viewing & Retrieving Records

VERS

5 Viewing & Retrieving Records

In this chapter

You can invoke a search to find a record. For example, you may want to view the details of the record or print a document related to one of your records. This chapter introduces you to the **VERS** search feature. Specifically, this chapter contains the following topics:

5	VIEWING & RETRIEVING RECORDS	ERROR! BOOKMARK NOT DEFINED.
	IN THIS CHAPTER.....	ERROR! BOOKMARK NOT DEFINED.
	WORKING WITH SAVED RECORDS	5-3
	<i>How to search for records</i>	5-3

Note: Not all functions and fields discussed in this chapter are available to all users.

Working with saved records

You may need to view or work with a record that has already been entered for a variety of reasons, depending on your user role, including the following:

- ❖ Printing documents
- ❖ Viewing record details
- ❖ Updating records

Before you can complete any of the above from a menu option you must first retrieve the record. Note that you can also update a record by selecting the record off of your unfinished record queue.

How to search for records

When you want to retrieve an existing record, you must first find and display it. You use a **VERS** search page to help find the record. The information you enter on the *Search* page is referred to as the search criteria.

If the search page includes a name and you use a common last name, such as Smith, that may return many records, you should also enter additional search criteria such as the date of the event to narrow the search.

To search for a record:

- Step 1** Navigate to the desired menu point (e.g., **Death → Print, Search,** etc.) If necessary, select the desired option, such as Book Vault Copy. The corresponding *Search* page appears.

The fields that you can use for searching depend on your location and the type of search you have selected.

The screenshot displays a web form titled "Sample Search Page (Death)". The form is organized into several sections:

- Record Identifiers:** Includes fields for "State file number" (with a blue highlight) and "Death record number" (with a yellow highlight).
- Decedent's Name:** Includes fields for "First", "Middle", and "Last" names. There is a checkbox labeled "Soundex on last name".
- Date of Death:** Includes a "Date of death (mm/dd/yyyy)" field with a calendar icon, and "From" and "To" date range fields.
- Month and Year of Death:** Includes a "Month" dropdown menu and a "Year" input field.
- Decedent's Sex:** A "Sex" dropdown menu.
- Decedent's Social Security Number:** An "SSN" input field.
- Date of Birth:** A "Date of birth" input field with a calendar icon.
- Location of Death:** Includes a "Country of death" dropdown (set to "UNITED STATES"), a "States" dropdown (set to "WASHINGTON"), a "County" dropdown, a "City list" dropdown, and a "City" input field.
- Spouse's Name:** Includes fields for "First", "Middle", and "Last" names.
- Special Criteria:** A checkbox labeled "Check to find records with Pending manner of death".

Figure 5-1 Sample Search Page (Death): This allows you to enter information to help find a specific record.

- Step 2** Enter additional search criteria to help find the record. Most types of searches (updating, printing, etc.) have their own set of fields and search criteria requirements that must be used for the search.
- Step 3** Click the **Search** button. If you need to add information a message will appear when you click **Search**. If you see such a message, add/modify your criteria as specified and click the **Search** button

again. The screen shot below shows a list of records that matched the search criteria that was entered.

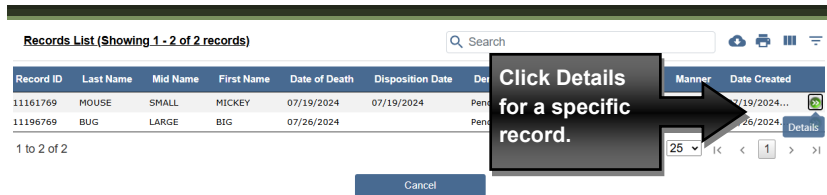
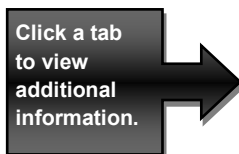


Figure 5-2 Sample Search Results: Find your record and then click its Details link to continue your work.

Tip: If no record appears in the list or if you do not see the record you want, you can click **Cancel** to return to the Search page where you can refine your search criteria.

Step 4

Click the **Details** link in the right-hand column for a specific record to view record details and confirm that you have selected the correct one. The **Record Details** page appears.



System Administrator
RETZ FUNERAL HOME AND CREMATORY
RHS-2
10/15/2024 01:46 PM
Your last login was at 10/15/2024 01:46 PM
Password expiration date - 2/14/2025

Montana Vital Records

Record Details

Death - Print - Certificate - HIPPA Proof Copy

Edit Information

ME/coroner acting as funeral home: No

29. - 30. Actual or Presumed Date and Time of Death

Date of death (MMDDYYYY): 07/26/2024

Date modifier: ACTUAL

Time of death: 01:01

Time indicator: Military

Time modifier: ACTUAL

14-17. Place of Death

Place of death: INPATIENT

Other - specify:

Country: UNITED STATES

State: MONTANA

County: BEAVERHEAD

Hospital not in list: No

Check if residence is the same as place of death address: No

Facility name: ALLENMORE MEMORIAL HOSPITAL

Street and number: 123 MAIN ST

Apartment number:

1 Decedent

1B Decedent AKAs

2 Case Assignment

3 Decedent Info I

4 Decedent Info II

5 Informant/Disposition/Funeral Home

6 Certifier/Pronouncer

7 Cause of Death

8 Manner of Death

9 Injury Info

10 State

11 Case Info

1. Decedent's Legal Name

First: BIG Middle: LARGE

Last: BUG Suffix:

Does decedent have AKAs?: No Prefer parent/parent: No

SFN type ID: D0 OVS not being called: Y

2. Decedent's Sex

Sex: MALE

Sex (for SSN validation): M

4. - 6. Decedent's Date of Birth and Age

Date of birth (MMDDYYYY): 01/01/1940

Age measure: Years

Age on last birthday - years: 84

Age if under 1 year - months:

Age if under 1 year - days:

Figure 5-3 Sample Record Details page (first tab): Use the tabs to review the record details.

Step 5

If you determine that this is the record you want, click the **Continue** button at the bottom of any page (or press your **Enter** key). The corresponding procedure executes (e.g., the record opens so that you can add or edit information, or the print process begins or you return to the main menu).

Notes: If you clicked the **Search** menu option, you will be able to view the record details. When you click the **Continue** button, there is no opportunity to modify the record.

If you determine that this is not the record you want or if you do not want to continue, click the **Cancel** button to return to the *Records List* page.

Chapter

6

Printing

VERS

6 Printing

In this chapter

This chapter provides information about printing documents from the **Print** menu option.

6 PRINTING 6-2

IN THIS CHAPTER.....6-2

OVERVIEW6-3

HOW TO PRINT FROM YOUR BROWSER.....6-3

HOW TO PRINT VIA ADOBE ACROBAT6-3

YOUR PRINT QUEUES.....6-4

How to print vault copies from your queues6-5

YOUR PRINT MENU.....6-6

How to print documents from a menu option.....6-6

How to print reports6-7

Note: Not all functions and fields discussed in this chapter are available to all users.

Overview

Most documents you can print are generated as PDFs. Newer versions of most browsers (e.g., Firefox, Edge, and Chrome) have their own PDF readers. If you are using one of these browsers, your document will open in a new tab of your browser. If this does not happen, it will open in Adobe Acrobat, which must be installed in addition to your browser.

How to print from your browser

If a new tab opens in your browser when you select to generate a document, you can print it directly from the tab that is showing the document. Click on the **printer icon** or press **Ctrl + P** on your keyboard to open your print dialog box and print to the selected printer.

How to print via Adobe Acrobat

Anytime you begin a print job from a browser that does not have its own PDF reader, you should see the document displayed in the Acrobat window. Once displayed, you can print it.

Note: If you encounter print problems with Adobe Reader, please check the *Troubleshooting* section in the “Technical Support” chapter or contact your help desk.

To print via Acrobat:

- Step 1** When you begin a print process that uses Adobe Acrobat, the **VERS** application may display a *File Download* dialog box. If the file (i.e., document) is displayed in Acrobat without first displaying the *File Download* dialog box, skip to Step 3.

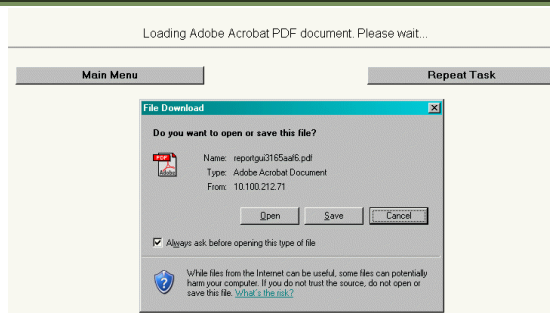


Figure 6-1 File Download Dialog Box: It may take a moment for the document to load. When the File Download dialog box opens, you can open the file, save the file or cancel the process from this box.

- Step 2** To allow you to view the file and then print it click the **Open** button. The generated file is displayed in Acrobat.
- Step 3** Once the document is displayed select **File → Print** from the Adobe Acrobat menu bar or the **Printer icon** on the toolbar. The *Print* dialog box appears.

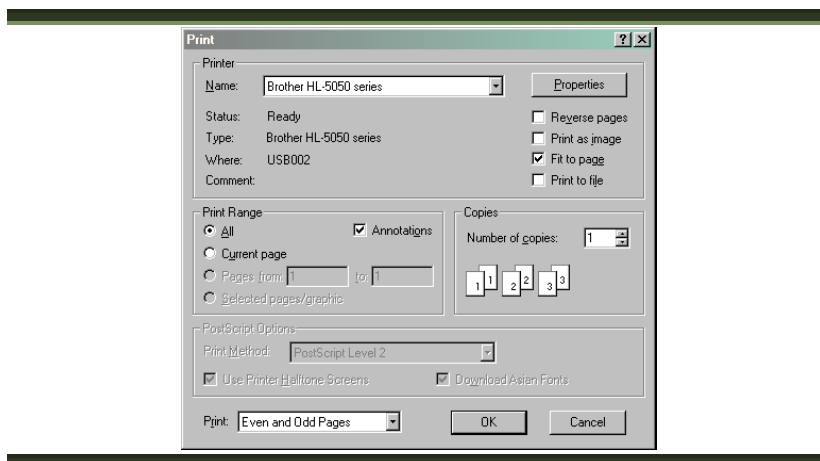


Figure 6-2 Sample Adobe Print Options: From here you can specify your print settings.

- Step 4** Specify your print/printer information in the *Print* dialog box, and then click the **OK** button. The document prints to the selected printer.
- Step 5** Close Adobe Acrobat.

Notes: Every printer is different, so if you must feed the paper back into the printer to print double sided, make sure the paper is loaded correctly.

Do not close Adobe Acrobat until you have a good print.

When closing Adobe Acrobat, you should remain within the **VERS** system. If this is not the case and you are taken to the log on page, contact your help desk to discuss your PC settings.

Your print queues

When a new record is registered, that record is placed on your **Print Book Copy** queue.

Click Print Book Copy.

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	Action
ALLCOR	CORALL	02/13/2025	MOI M. MOI	BEAVERHEAD CORONER		
PAPER	ROBIN	03/20/2025	ROBIN DIRECTOR			
NEWTON	WAYNE	03/20/2025	STAN D. HARDING	COMMUNITY MEDICAL CENTER		
PAPER	JACK	03/20/2025	CALLIE CREBS			

1 to 4 of 4 Rows per page: 25

When a record is amended, that amended record is placed on your **Print Amendment Book Copy** queue.

Click Amended Book Copy.

Details	Last Name	First Name	Date of Death	Funeral Director	Certifier Practice	COD Certified	Action
+	DIANNA	ROBIN	02/26/2025	STAN A. HARDING	COMMUNITY HEALTH CARE	Y	➡
+	DEMONSTRATION	FRANK	03/15/2025	STAN D. HARDING	BEAVERHEAD CORONER	Y	➡
+	DEMONSTRATION	FRANK	03/15/2025	STAN D. HARDING	BEAVERHEAD CORONER	Y	➡
+	DEMONSTRATION	SAMUEL	03/15/2025	STAN D. HARDING	COMMUNITY MEDICAL CENTER	Y	➡
+	DEMONSTRATION	SAMUEL	03/15/2025	STAN D. HARDING	COMMUNITY MEDICAL CENTER	Y	➡
+	DEMONSTRATION	BETTY	03/15/2025	STAN D. HARDING	COMMUNITY MEDICAL CENTER	Y	➡

1 to 6 of 6 Rows per page: 25

Note: If a record is listed on both the **Print Book Copy** and the **Print Amendment Book Copy**, you should always print from the **Print Book Copy** first.

How to print vault copies from your queues

- Step 1** Click your **Print Book Copy** or the **Print Amendment Book Copy** queue.
- Step 2** Click the **double arrow** next to the record/amendment you want to print. The *Report – Confirm* page opens.

Report - Confirm

Print Book/Vault Certificate Copy

Generate Document

Continue

- Step 3** Click **Generate Document**. The document opens on a new tab in your browser or is sent to Adobe Acrobat from which you can print it.
- Step 4** After you print the document, click **Continue** to return to your **Dashboard**.

Your print menu

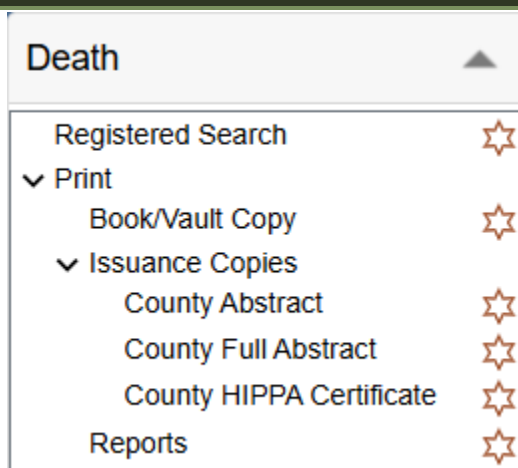
Documents may also be printed using the **Print** menu option. Because these documents are record-specific you must find the record you want to print using the *Search* page.

Your **Print** menu option also allows you to print reports designed for your location. See “How to print reports” for information about this process.

How to print documents from a menu option

- Step 1** Where XX is the name of the document you want to print (e.g. Vault Copy), click **Module Name (i.e., Birth, Death, Marriage, etc.) → Print → XX**. The corresponding *Search* page appears.

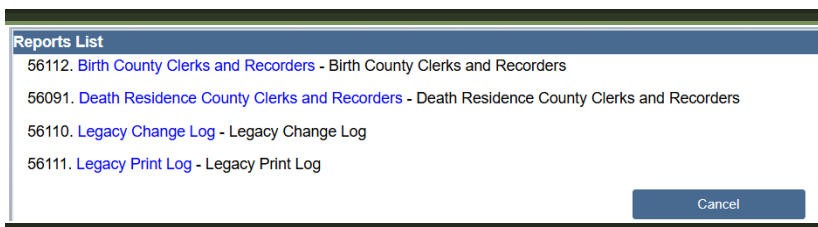
Note: To see some types of documents, you may need to expand an option such as clicking Issuance Copies as shown below.



- Step 2** Use the *Search* page to find the desired record. See the chapter called “Viewing & Retrieving Records” if you need more information.
- Step 3** Click the **double arrow** for the record you want to print.
- Step 4** Once the correct record appears on the *Record Detail* page, click the **Continue** button at the bottom of the page
- Step 5** Click **Generate Document**. The document opens on a new tab in your browser or is sent to Adobe Acrobat from which you can print it.
- Step 6** After you print the document, click **Main Menu** or **Repeat Task** depending on what you want to do next.

How to print reports

- Step 1** From the Main menu, click **Death → Print → Reports** to see a list of available reports such as shown below.

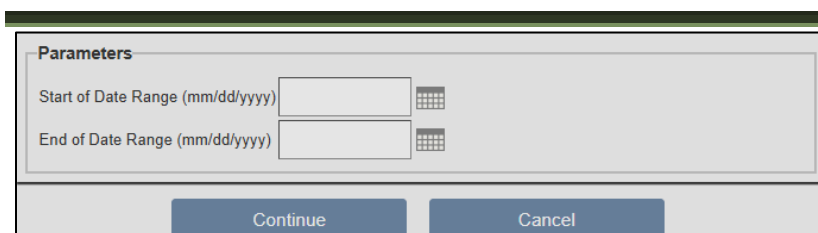


The screenshot shows a window titled "Reports List" with a list of reports:

- 56112. [Birth County Clerks and Recorders](#) - Birth County Clerks and Recorders
- 56091. [Death Residence County Clerks and Recorders](#) - Death Residence County Clerks and Recorders
- 56110. [Legacy Change Log](#) - Legacy Change Log
- 56111. [Legacy Print Log](#) - Legacy Print Log

A "Cancel" button is located at the bottom right of the window.

- Step 2** Click on the report you want to print. Depending on the report you will be asked to add some **parameters** to restrict what is included in the report such as shown below.

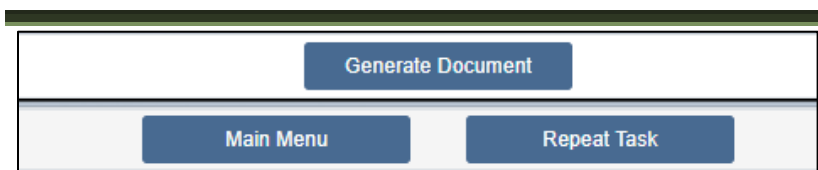


The screenshot shows a window titled "Parameters" with two date range fields:

- Start of Date Range (mm/dd/yyyy) [] [Calendar Icon]
- End of Date Range (mm/dd/yyyy) [] [Calendar Icon]

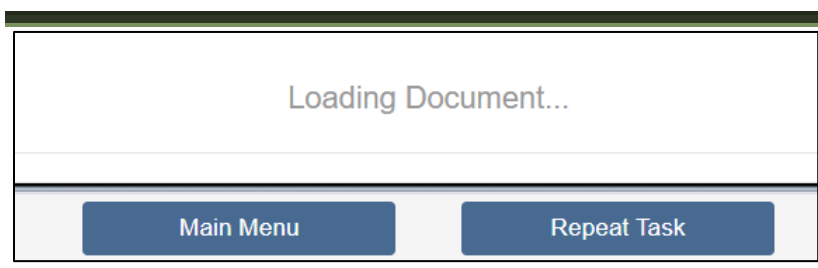
At the bottom, there are "Continue" and "Cancel" buttons.

- Step 3** Add/modify the **parameters** as needed, and then click **Continue**



The screenshot shows a window with a "Generate Document" button at the top and two buttons at the bottom: "Main Menu" and "Repeat Task".

- Step 4** Click **Generate Document** to download the report. Depending on the report and your browser, you may see that the report has been downloaded. Open the file. The generated document is downloaded. Open the download to view and print the report. Go back to your **VERS** screen.



The screenshot shows a window titled "Loading Document..." with a progress bar and two buttons at the bottom: "Main Menu" and "Repeat Task".

- Step 5** Click **Main Menu** to return to your Dashboard or **Repeat Task** if you want to run another record.