OVERS GUIDE FOR OREGON COUNTIES

Oregon Vital Events Registration System (OVERS)

County User Edition
Revised March 2025

Public Health Division
Center for Public Health Practice
Center for Health Statistics

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1 Basic Navigation

Introduction

The Oregon Vital Events Registration System (OVERS) is a web-based application for submitting birth and death report information to the state vital records office. The counties use OVERS to enter orders for birth and death records, to issue certificates and replacement certificates, to manage the 24-hour notice queue and to reconcile payments using Cashier Close.

OVERS is a secure, vital records management system that uses standard web navigation techniques and functionality. The application includes tools used to search and verify the quality and completeness of the data entered.

This step-by-step guide explains the data entry process for retrieving and issuing birth and death certificates from OVERS for a county user. In this chapter you will learn the basics of navigating through the application.

If you have questions about using OVERS, you may contact the OVERS Help Desk at 971-673-0279, Monday- Friday 8 am to 5 pm.

All examples shown in this document contain fictional report information.

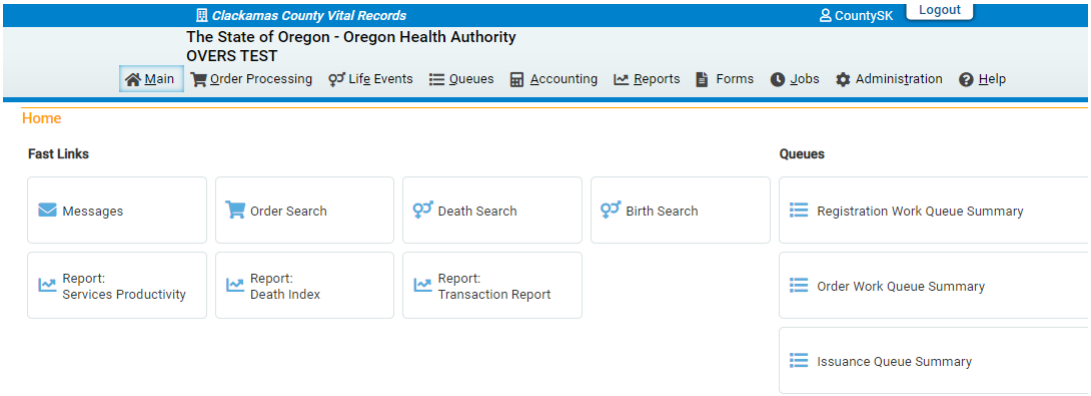
Getting Started

Logging In

On the OVERS **Login** page, enter your assigned username in the **Username** field and your password in the **Password** field and click **Login**. Both your Username and Password are case sensitive.

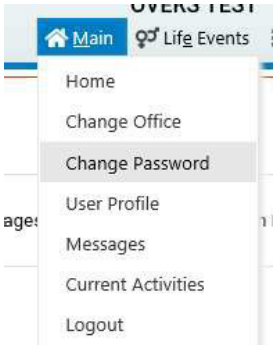
Home

After you successfully log in to OVERS, you will be presented with a user-specific **Home** page. Your **Home** page shows links to sections of the OVERS application that you access frequently, so your **Fast Links** may change over time. The fast links will not appear for new users. They are added over time depending on which links are the most accessed. The image below is an example of a **Home** page:



Notice the **Menu Bar** across the top of the page. From the menu bar, you will navigate throughout the OVERS application.

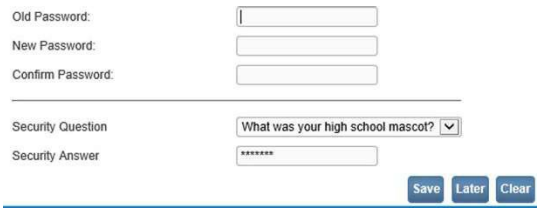
Change Password



You may change your password at any time. To change your password, choose **Main** from the **Menu Bar** along the top of the page, then choose **Change Password**.

You will be taken to the **Change Password** page. Enter your **Old Password**, or the password you used to log in to OVERS. Then enter your new password twice, once in the **New Password** field and again in the **Confirm Password** field. Click **Save**.

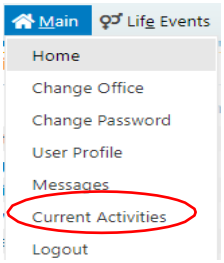
Passwords must be 8 to 26 characters long and must contain a number. Passwords are case sensitive. Special characters can be used but are not required.



If you don't know your password, then you can reset it yourself by clicking on **Forgot your password?** on the OVERS login page or by calling the OVERS Help Desk at 971-673-0279 to have a new temporary one issued. They are available Monday through Friday from 8am to 5pm.

Current Activity

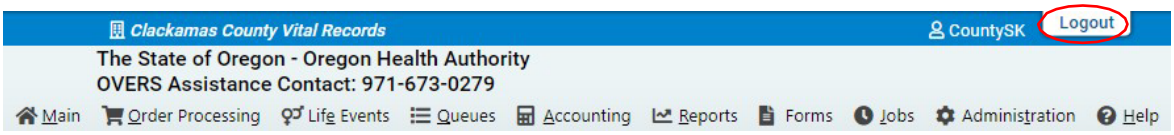
The **Current Activities** pane displays a listing of the **Queues** that contain records requiring attention. See Queues, elsewhere in this manual, for more information about **Queues**.



Logout

Whenever you are going to be away from your desk or workstation, whether you're going home for the day or just going to lunch, you should always log out of OVERS.

To log out of OVERS, click **Logout** in the upper right-hand corner. The **Logout** button is available on every page in OVERS.



After you click the **Logout** button you will be taken back to the **Login** page. If you do not log out of OVERS, you will be automatically logged out after 15 minutes of inactivity and you may lose work you have not saved.

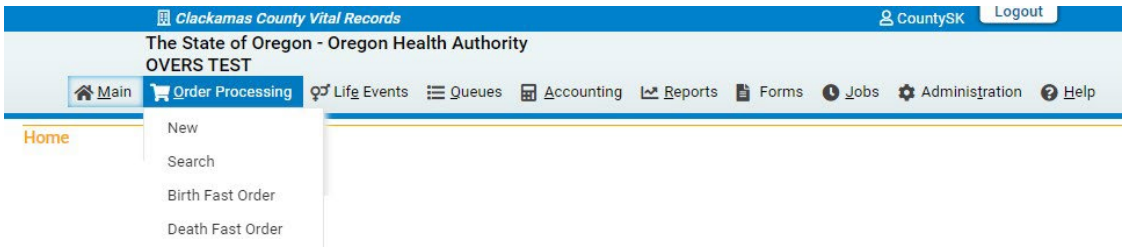
Navigation

General Navigation

Avoid using the 'Back' button in your browser. You may lose the data entered if this button is used. OVERS provides other tools for navigating from one page to another.

Menu Bar

The **Menu Bar** appears across the top of every page in OVERS and provides easy access to each section of OVERS. Each menu heading on the Menu Bar contains additional options to navigate through OVERS. For example, the **Order Processing** menu contains options to start a new order or search for an existing order.



Page-to-Page Button Controls

Page-to-page button controls are located at the bottom of every new order. The **Next** button saves entries on the current page and moves to the next page in the order process. The **Save** button saves changes without leaving the current page. The **Clear** button clears data that hasn't been saved on the page.

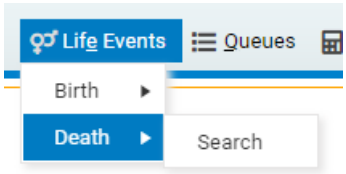
On a Fast Order you will see the **Clear** and **Save & Validate** buttons. The **Validate** button performs the error checking process on the order.

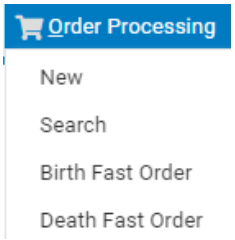
Helpful Tools

Tools for Searching

The OVERS application provides search tools for previewing birth and death reports as well as Orders that are being processed. Search tools are available under the **Life Events** menu along the top of the screen to preview Birth and Death Reports.

Click on **Main Menu>Order Processing>Search** to locate orders that are being processed.





Search – The Search button searches an index and returns *exact* matches to a specified keyword.

Soundex – The Soundex button is a way of searching information based on how the word sounds rather than how it is spelled. It allows for variations in spelling so that a misspelled name entered as the search phrase will retrieve all items that sound like or are close to the spelling of the entered phrase.

Wildcard – Using the wildcard symbol (%) at the end of a partially entered phrase will return all matches to the partial entry. For instance, if the phrase “Sm%” is entered, all items that begin with “Sm” will be returned as results.

Required Fields Indicator

The Required Fields Indicator is a red arrow that appears next to all mandatory fields. They are most commonly found on the **Order** pages. Fields will also be encircled in red.

Drop-down Lists

Drop-down lists are dialog box items showing only one entry until its drop-down arrow is clicked. Drop-down lists provide you with a pre-defined set of choices eliminating the need to manually type data. To view all items in a drop-down list simply click on the down-arrow on the right side of the control. Some drop-down lists will have more selectable items than can be displayed on one page. In those cases, a scroll bar will appear on the left side of the list. It is possible to select an item from the list without actually dropping the list down. If you already know the item you want to select, just tab to the drop-down and type the first letter in the name of the item.

After tabbing to the field, it is possible to navigate up and down through the list using the directional arrow keys on your keyboard.

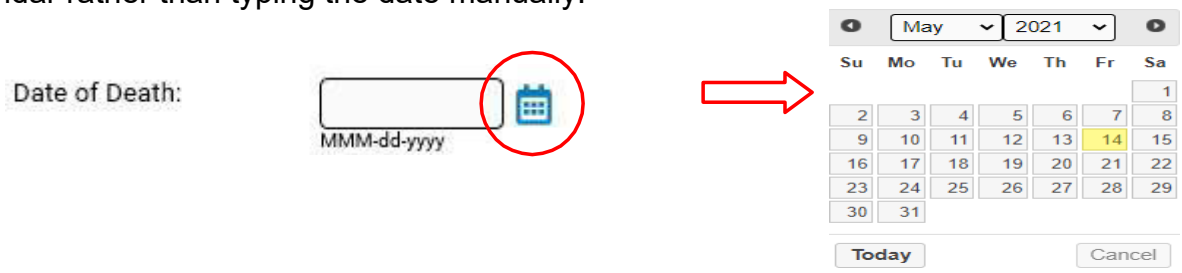
Date Fields

The OVERS application allows you to enter a date using letters and/or numbers in various formats. When using numbers, you must enter months as two digits, days as two digits and years as four digits. Here are some examples of entering dates.

If you type:		OVERS will display:
MM-DD-YYYY	05-14-2021	MAY-14-2021
MM/DD/YYYY	05/14/2021	
MMDDYYYY	05142021	
monDDYYYY	may 14 2021	

Note: Placing the cursor in the date field and pressing the F12 key on the keyboard will automatically enter the current system date into the field.

The OVERS application also allows you to enter dates using the calendar control feature. Anywhere you see the calendar icon, you can choose the date from the calendar rather than typing the date manually.



By default, the current month, day and year are displayed. As with other drop-down lists, clicking the down arrow next to the month or year will show you all the available options in the list. Once you select the correct month and year from the drop-down lists, click on the day of the month. This will populate the date chosen.

Keyboard Shortcuts

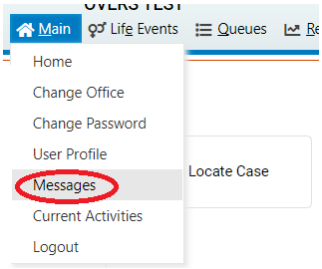
A keyboard shortcut is a key or combination of keys that provides an alternative to standard ways of performing an action. The OVERS application includes the keyboard shortcuts shown below.

Shortcut Key(s)	*Works in Field*	*Performs this Function*
F12	Date fields	Enters the current date into any date field
Tab	Any field, button or check box	Moves forward one box, button or check box to another

Shift + Tab	Any field, button or check box	Moves backward from one box, button or check box to another
Enter	Any button control	Activates the next button on the page
1st letter of word	Drop-down lists	Populates the field with the selection in the list beginning with the letter entered For lists with more than one selection beginning with the letter entered, repeat the first letter until the correct choice appears in the field.
Space bar	Radio button or check box	Selects a radio button or check box
Arrow key	Radio button	Moves from one radio button to the next
Alt + Down arrow	Drop-down list	Opens a drop-down list
Alt + Up arrow	Drop-down list	Closes a drop-down list
%	Any search box	Wildcard symbol that stands for one or more characters in a search string

Communication

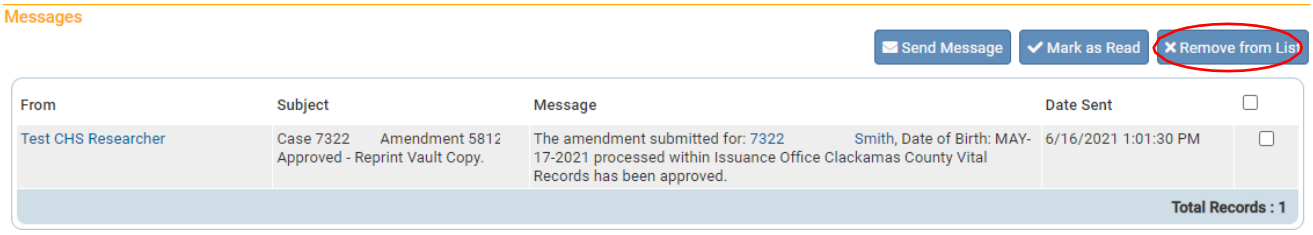
Messages



The Messages page displays the messages that are relevant to your office. Some messages are sent from user to user, while others are system generated and appear with no interaction from the user. To access the messages feature, click on the **Messages** fast link on the **Home** page. Alternatively, you can go to the **Main** menu along the top of the screen, then click **Messages**. You will be taken to the **Messages** page. On this page, you can view the messages you've received or send a new message to another OVERS user.

Viewing and Deleting Messages

To view a message, click on the name in the **From** column. This will open the corresponding message. When you are finished reading the message, click the **Close** button to close the message window and return to the **Messages** page.

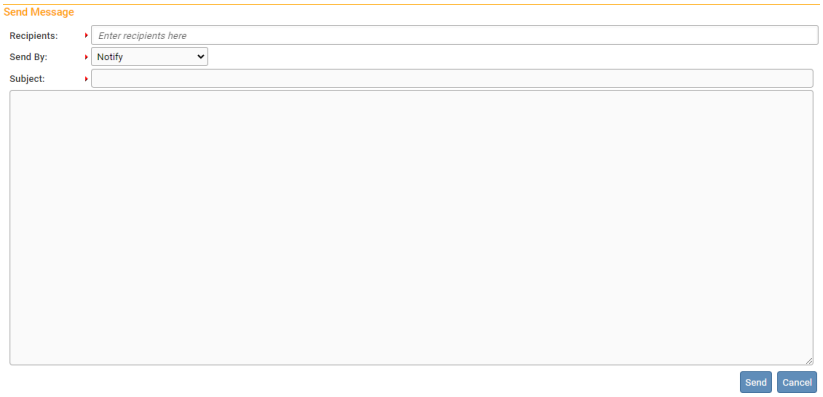


To delete a message, select the message by clicking on the corresponding check box to the right of the message information. Then click the **Remove from List** button as shown in the message listed above. Deleted messages cannot be restored. Do not delete messages unless you are sure that you will not need them.

Note: Placing a checkmark in the box to the right of **Date Sent** in the upper right- hand corner of the page will select all messages in the list.

Sending Messages

In the upper right-hand corner, click on the **Send Message** button. You will be taken to the **Send Message** page.



You may send a message to a Person or an Organization. Enter the First and/or Last Name of the person to be added to the message as a recipient and a drop-down will appear with a list of recipients that match what you entered. Select the correct one and the page will refresh and add the recipient to the **Selected Recipients** list. You can then search for another individual if you choose.

> **Note:** Use caution when sending a message to an Organization, as the message will be sent to every user within that organization.

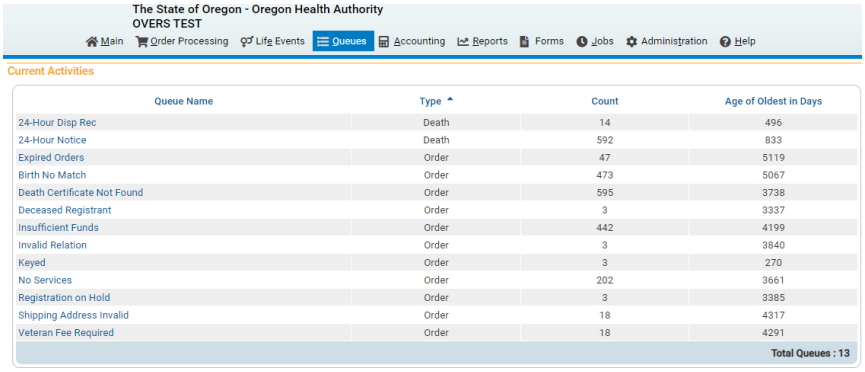
Make a selection from the **Send By** drop-down list.

a. Email and Notification – Sends the message via external e-mail and internal messaging. The message will appear in the OVERS messages list.
b. Email – Sends the message via external e-mail only. The message will not appear in the OVERS messages list.
c. Notify – Sends the message via internal messaging only. The message will appear in the OVERS messages list. No external email will be sent.

Enter a **Subject** and type the message to the recipient. Then click **Send**. A box will appear to notify you that the message has been sent. Click **OK**.

Queues

Queues appear on the Home Page and in **Current Activities. Current Activities** can be accessed by clicking on **Main>Current Activities**. As orders are processed, they will appear in a queue if they fall into a category that requires a follow-up. If there is nothing in a queue, the queue name will not be shown on the screen.



Queue Name	Type	Count	Age of Oldest in Days
24-Hour Disp Rec	Death	14	496
24-Hour Notice	Death	592	833
Expired Orders	Order	47	5119
Birth No Match	Order	473	5067
Death Certificate Not Found	Order	595	3738
Deceased Registrant	Order	3	3337
Insufficient Funds	Order	442	4199
Invalid Relation	Order	3	3840
Keyed	Order	3	270
No Services	Order	202	3661
Registration on Hold	Order	3	3385
Shipping Address Invalid	Order	18	4317
Veteran Fee Required	Order	18	4291

Total Queues : 13

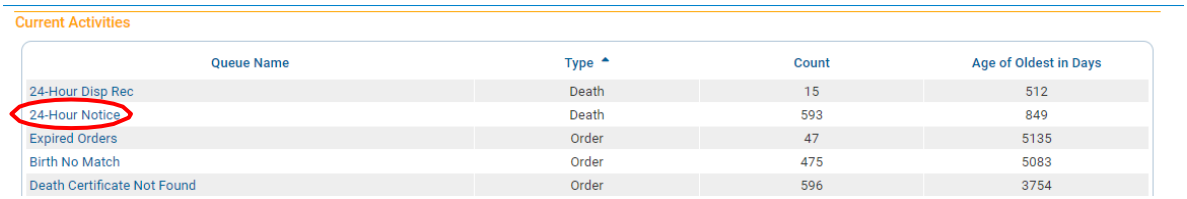
Special Registration Processing Queue

1. 24-Hour Disp Rec - Death – After a record is noted that the disposition permit has been received, then the record automatically is moved into this queue until it is registered at the state.
2. 24-Hour Notice - Death – When a death record is entered by a funeral director a notice will appear in this queue. Once a disposition permit is received, it must be noted on the 24-hour notice that appears in this queue.

The 24-Hour Notice Queue and Disposition Permits

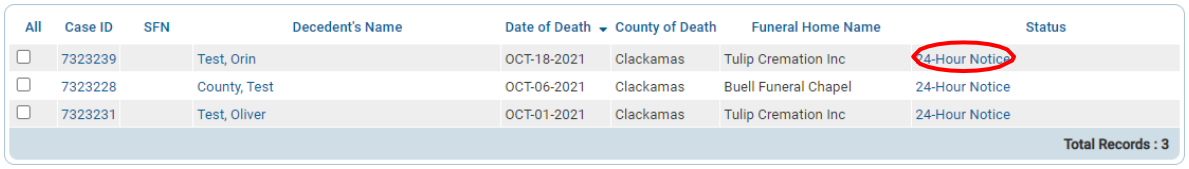
When the funeral home creates or assumes ownership of a death record an electronic 24-Hour Notice is sent to the county. The 24-Hour Notice status is assigned to the death record and the notice will appear in the Special Registration Processing Work Queue. The funeral home generates a Disposition Permit which will accompany the body to the place of final disposition. The sexton at the place of final disposition will sign the Disposition Permit and send a copy to the county where death occurred. Once the county receives the Disposition Permit for the death, they must indicate it has been received in the **24-Hour Notice Queue**.

To access the **24-Hour Notice** queue, go to **Main** and then **Current Activities** and click on 24-Hour Notice in the list of queues.

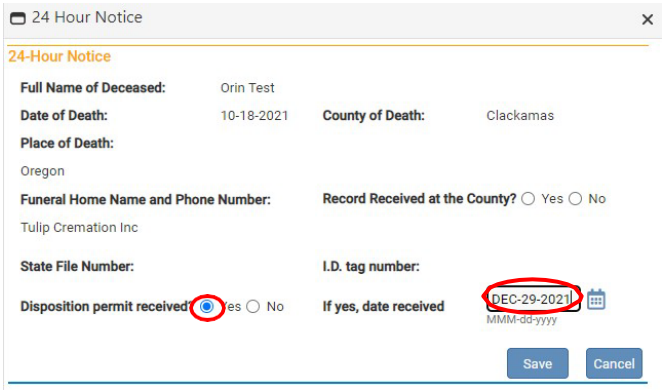


Queue Name	Type	Count	Age of Oldest in Days
24-Hour Disp Rec	Death	15	512
24-Hour Notice	Death	593	849
Expired Orders	Order	47	5135
Birth No Match	Order	475	5083
Death Certificate Not Found	Order	596	3754

Click on the **24-Hour Notice link** in the **Status column** for the decedent whose disposition permit you received.



Select Yes, **Disposition permit received** and enter the date received. Then click **Save**.



The record will automatically be transferred to the 24-Hour Disp Rec queue until the record is registered at the state.

Note: *The 24-Hour Notice Queue must be monitored on a frequent basis to ensure that the county is receiving the disposition permits from the sexton or final place of disposition for the decedent. If you have records in this queue that are several months old, contact the funeral home that entered the record to locate the disposition permit.*

Order Work Queue Summary

1. Expired Orders – This queue has expired orders.
2. Birth No Match – This queue lists orders with no birth match.
3. Death Certificate Not Found – This queue lists orders that do not have a vital record associated with them.
4. Deceased Registrant – This queue shows deceased registrants.
5. Insufficient Funds – This queue lists orders where the amount of money paid is less than the amount of money owed for the record.
6. Invalid Relation – This queue shows an invalid relationship.
7. Keyed – This queue lists orders that were started but not completed.
8. No Services – This queue has orders where no services are listed.
9. Registration on Hold – This queue lists orders that cannot be completed because a hold has been placed on the associated vital record(s).

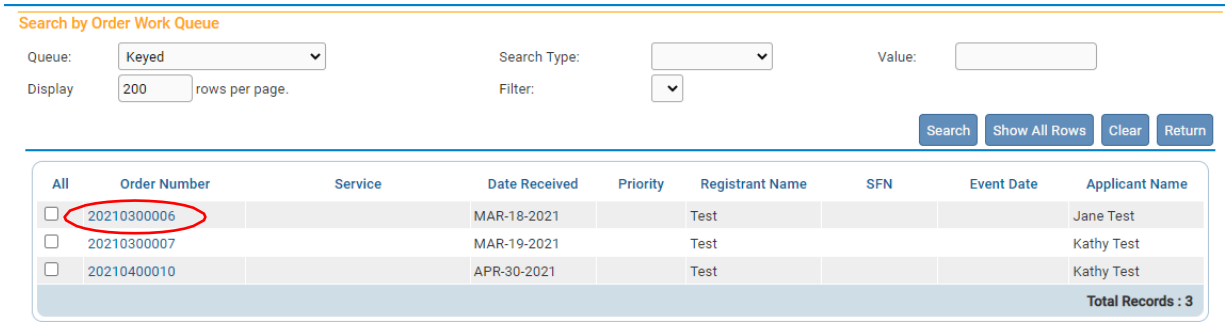
10. Shipping Address Invalid – This queue shows orders with invalid shipping addresses.
11. Veteran Fee Required – This queue shows orders where a veteran fee is required.

Issuance Queue Summary

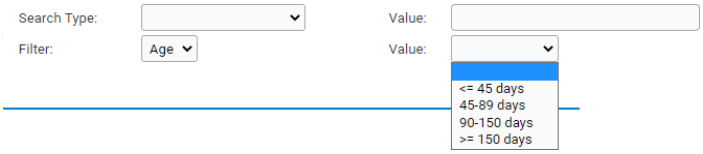
The Issuance Queues can only be found by selecting the Queues Link in the top menu bar. The Issuance Queues are primarily used to print certified copies. The Issuance Queues are created based on the Service Type that has been selected to be Issued within an Order.

1. Birth CC Queue – This queue lists the certified copies for Birth Records that still need to be issued.
2. Death CC Queue – This queue lists the certified copies for Death Records that still need to be issued. This includes long form, short form, and veterans' copies.
3. Birth Replace CC Queue – This queue lists all the certified replacement copies for Birth Records that still need to be issued.
4. Death Replace CC Queue – This queue lists all the certified replacement copies for Death Records that still need to be issued.

Select one of the queues by clicking on the corresponding **Queue Name**. The queue will open, showing a list of all reports in the queue. An example is shown below. When you find the order that needs completing, click on the order number.



Filtering Records



If too many records are shown, you can reduce the number shown by filtering the results. To filter results, make a selection from the **Filter** drop-down list. A second drop-down list will appear for you to enter an acceptable **Value** to be shown. In this case, **Age** refers to the length of time between today's date and the date of the 24-Hour Notice. For example, if you chose **Age**, you may choose only to view reports less than 45 days old.

Alternatively, you can sort orders by clicking any of the headers listed such as **Event Date** or **Registrant Name**.

Queues can help you identify orders that need to be completed and are an easy way to find the 24-Hour Notices that need to be matched to disposition permits.

Status of an Order

The **OVERS** application manages data quality and work-flow of the registration process through the assignment of statuses. To track the steps undertaken by the various parties involved in completing a vital record, the **OVERS** system assigns one or more statuses to a vital record when an action is performed. Similarly, every order has a status bar that indicates the status of the order. Both the status bar for the order and for the vital record associated with the order are important tools in determining when to issue a record. First, we will discuss the status of an order.

The Status of an order can be viewed from the top of every page associated with the order and lists the order number and applicant name.

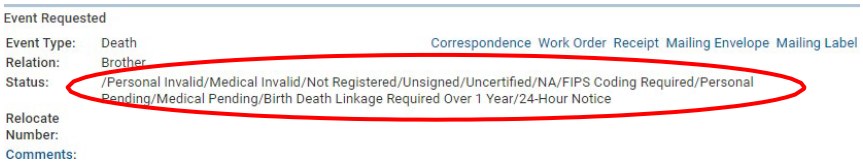
The list of terms below describes what each phrase on the status bar for an order means.

Status Terms for Orders	
Term	**What it Means**
Order Valid	All the information on the order is correctly entered.
Order Invalid	Some information on the order was incorrectly entered.
Complete	The security paper number for the certified copy has been entered in the OVERS order and the issuance has been checked as complete, signifying that the records have been issued.
Incomplete	The security paper number for the certified copy may or may not have been entered in the OVERS order and the issuance has not been checked as complete.

Status Bar Terms for Vital Records

The Status Line provides a dynamic, real-time view of the status of a birth or death record. It can be viewed by clicking on preview after the event search of a record.

It can also be found in the **Event Requested** section of the Order.



Before issuing an order, you must check the status of the vital record(s) to determine if the record(s) should be issued or not. There are certain circumstances under which you should not release a record and you will only know that by reviewing the status bar for the vital record and the order. For example, you can only issue a birth record if it has been assigned a State File Number (otherwise known as being 'registered' with the State).

There are certain circumstances under which you should not release a record and you will only know that by reviewing the status bar. Pay special attention to the list of terms that indicate hold status or that a record should not be issued.

The terms in the table below are the most common to appear on a record.

Status Terms for Birth Certificates

Term	What it Means
New Event	Appears on a newly created record.
Not Certified	Birth record has not yet been signed by the birth certifier.
Certified	Has been signed by the birth certifier.
Registered	Has been registered at the State and assigned a State File Number (SFN).
Legal Valid	The legal birth certificate data has been entered, checked for completeness, and found to be correct.
Legal Valid with Exceptions	The legal birth certificate data had one or more exceptions that were manually overridden by the certifier.
Legal Invalid	The legal birth certificate data has one or more errors or omissions that require a correction.
Medical Valid	The statistical data has been entered, checked for completeness, and found to be correct.
Medical Valid with Exceptions	The statistical data had one or more exceptions that were manually overridden by the certifier.
Medical Invalid	The statistical data has one or more errors or omissions that require a correction.
Birth Certification Required	The birth certifier's signature is required.
AOP Pending	The Acknowledgment of Paternity paperwork has not yet been received and accepted by the State.
Amendment Exists	An amendment has been made to the record.

Hold Statuses for Birth Records

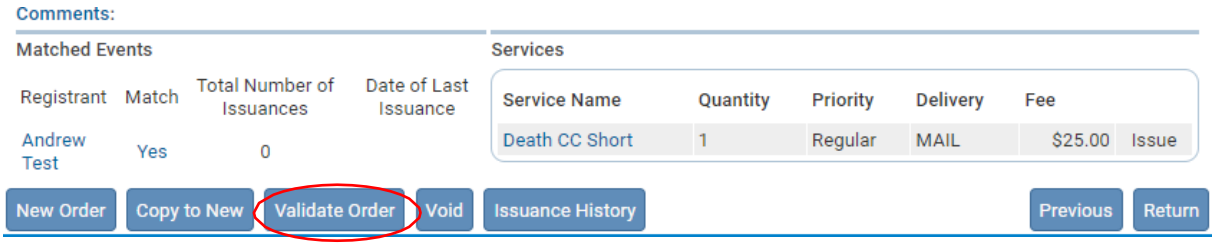
Contact the State before Issuing Records that have any of the below terms in their status bar.

Term	What it Means
Registration Approval Required	Do not issue. The State's Registration approval is required.
Not Registered	Do not issue. Has not yet been registered in OVERS.
Missing Child	Child may be missing. Contact the State before issuing.
Deceased	Child's birth record has been matched to a death record. Stamp birth record with Deceased stamp.
Do not issue	Contact the State before issuing.
Fraudulent Activity	Contact the State before issuing.
Monies Owed	Money is owed to the State for this record. Contact the State before issuing.
Legal Action	Contact the State before issuing.
Probable Death match	Infant may be deceased. Contact the State Registration Unit before issuing. If confirmed, stamp the record "deceased".
Hold	State has placed a hold on the record. Contact the State for details.

Hold Statuses for Death Records Contact the State before Issuing Records that have any of the below terms in their status bar.	
Term	**What it Means**
Fraudulent Activity	Contact the State before issuing.
Hold	State has placed a hold on the record. Contact the State.
Death Certification Required	The medical certifier's signature is required.
Registration Approval Required	The State's Registration approval is required.
Critical Info Request Sent-DO NOT ISSUE	Do not issue-Info request sent by the State
Critical Info Missing-DO NOT ISSUE	Do not issue-Info is missing on the record

Status Terms for Death Certificates	
Term	**What it Means**
New Event	Appears on a newly created record.
Not Signed	Has not yet been signed by the funeral director.
Signed	Has been signed by the funeral director.
Not Certified	Has not yet been signed by the medical certifier.
Certified	Has been signed by the medical certifier.
Not Registered	Has not yet been registered at the State.
Registered	Has been registered at the State and assigned a State File Number (SFN).
Personal Pending	The legal death certificate data has been started but not completed or validated.
Personal Valid	The legal death certificate data has been entered, checked for completeness, and found to be correct.
Personal Valid with Exceptions	The legal death certificate data had one or more exceptions that were manually overridden by the funeral director.
Personal Invalid	The legal death certificate data has one or more errors or omissions that require a correction.
Medical Pending	The confidential, medical data has been started but not completed or validated.
Medical Valid	The confidential, medical data has been entered, checked for completeness, and found to be correct.
Medical Valid with Exceptions	The confidential, medical data had one or more exceptions that were manually overridden by the medical certifier.
Medical Invalid	The confidential, medical data has one or more errors or omissions that require a correction.
Dropped to Paper	The record has been converted to a paper copy to be submitted to the medical certifier.
Medical Certification Requested	The funeral director has sent an electronic request to the medical certifier to complete the record in OVERS.
Medical Query Needed	A medical question needs to sent to the medical certifier by the state. A certificate can be issued if the record is registered.
Medical Query Sent, Sent 2X, or Sent 3X or more	A medical question has been sent to the certifier by the state. A certificate can be issued if the record is registered.
Nosologist Review	The record will be reviewed by the state nosologist. A certificate can be issued if the record is registered.
Review of Personal Items Required	The state is reviewing the personal items on a record. A certificate can be issued if the record is registered.
Amendments Exist	Amendment(s) have been entered on the record. A certificate can be issued if the record is registered.

Once you have entered the order information into OVERS, you can check for errors or validate that the information you have entered is correct and complete by clicking on the **Validate Order** button.



Error Checking and Correction

Error Types

There are two types of errors or edits in **OVERS**: (1) Hard and (2) Soft. Hard errors are highlighted on-screen in red. Soft errors are highlighted in yellow. Pages marked with a **red** X contain hard edit rule failures that must be corrected before the order can be completed. Pages marked with a **yellow circle** contain soft edit rule failures that may be overridden.

These symbols serve as indicators as to which pages contain errors and which pages pass validation.

Yellow=Soft Edit: Pages containing overridable errors are marked by a yellow circle. Correct the information or override the error. After it is corrected or overridden the circle will remain yellow.

Red=Hard Edit: Pages containing non-overridable errors are marked by a red X. These errors must be corrected. After the error corrected and you re-validate the page, the X will turn green.

Overriding Edits

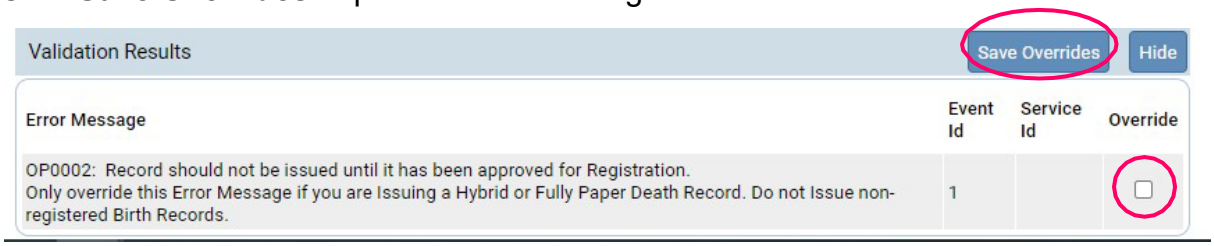
Orders can still be processed with a soft edit message present. In those cases, a checkbox will be provided in the **Override** column.

It is very important to read any error message. Birth records **must be** registered at the state to be issued. Never issue a birth certificate if the baby is not named on the record.

Death records that are fully paper or hybrid records (the status line will show “Dropped to Paper”) can be issued if you have the legally sufficient report in your hand. These records

will show an error when you click **Save & Validate** because the record or part of the record isn't entered into OVERS

In this example, a death record has not been registered at the State. If you have the legally sufficient death record in your hand, then you can put a checkmark in the **Override** box. Click **Save Overrides** to proceed with issuing the record.



Hard Edits

Hard edits appear in the Validation Results box without an override checkbox next to them. These edits will not allow you to complete the order until they have been corrected in the order. In most cases. A required field was left blank in the order. Contact the State if you encounter a hard edit that you are not able to correct.

Order Validation Rules - Hard Edits

Contact the State Registrar's office if attempting to issue records that list any of these terms as a validation result for an order.

For Birth and Death Records	
Registration is on Hold	Do not issue until State has removed the hold.
Correction Pending Approval	Do not issue. An amendment has been requested but has not yet been approved by the State.
For Birth Records Only	
Registration is for an UNNAMED BABY	Do not issue records with a blank first or last name for the Child. Let parents know they can add the name with an amendment.
Matched event has missing person status	Birth certificate has been placed in hold status because the child is missing. Call the State for details before discussing with applicant.
Deceased Applicant	Do not issue. Contact the State.

Comments

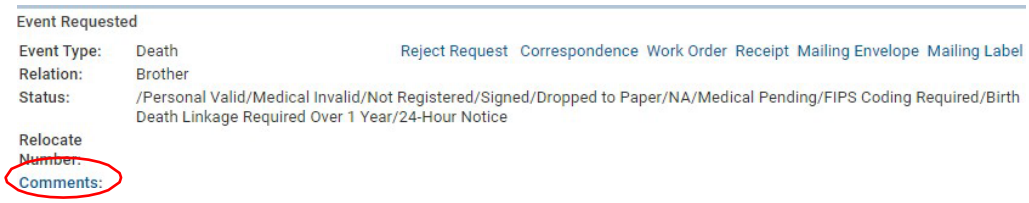
During the process of issuing a record it is sometimes necessary to store comments or remarks about the order. These comments can serve as reminders or as instructions to others who will work on the order. Adding comments helps the employees at your office as well as the employees at the Center for Health Statistics if there are ever any questions about an order.

Some of the most common reasons to enter a comment are listed below.

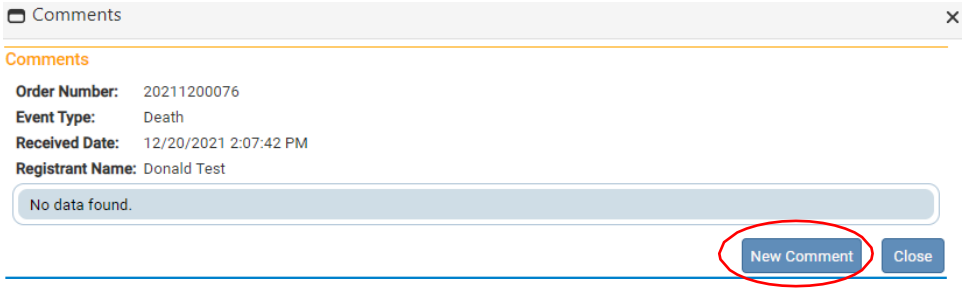
- Certificate returned in mail as undeliverable
- Document ID
  Customer getting replacement certificates
  A comment should be left on the original order as well as the replacement order, include intaglio paper number being voided, new paper number, and person entering replacement into OVERS
- Disposition permit never received
- Anything unusual about an order

Adding a Comment

Click on Comments in the Event Requested section of the fast order.

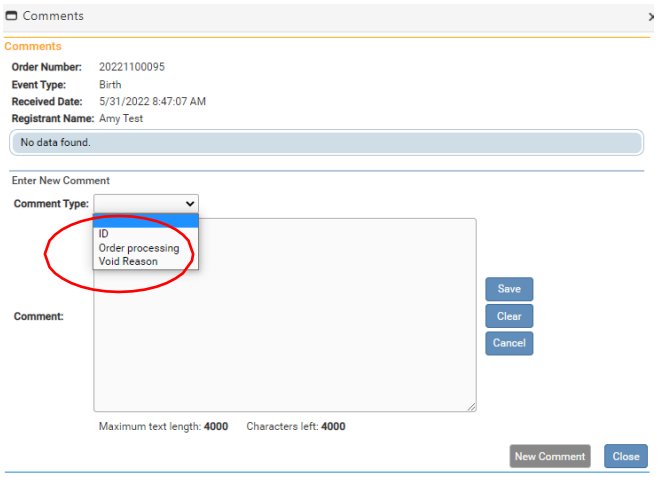


The **Comments** window will pop up. To add a new comment, click on **New Comment** located at the bottom of the **Comments** window.



The **Enter New Comment** tab will open allowing you to enter new comments.

The first step in adding a new comment is to select a **Comment Type**. Every comment must have a type assigned to it. The options available are ID, Order Processing or Void Reason.



The **ID** comment type is used to enter the identification provided for this order. The comment should contain either the type of ID, issuing authority, and identification number **or** the barcode number on the ID (entered using a barcode scanner) **or** if ID is on file, staff may enter "Applicant ID on file" or "Picked up by [name], ID on file".

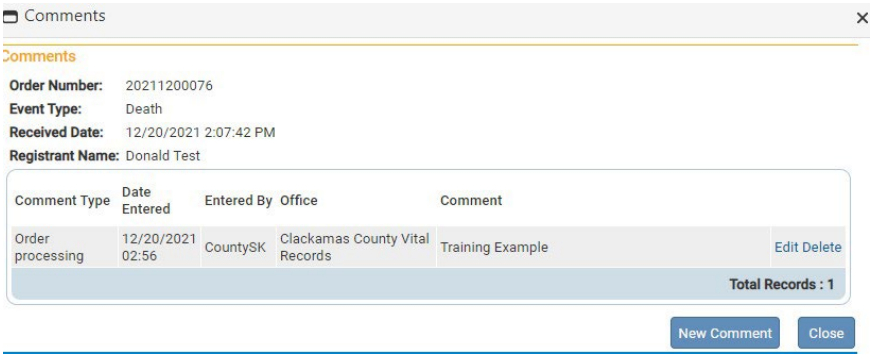
The **Order Processing** comment type is used to enter any information you want saved about this order. This comment type will appear on the Summary page of the order.

The **Void Reason** comment type is used to document why an ordered was voided.

When you have finished entering a comment, select **Save**. Or, choose **Clear** to clear your entry or **Cancel** to close the comment window without saving changes.

Selecting **Save** will write the comment to the **OVERS** database and return you to the main **Comments** window, shown below. Notice that a portion of the comment can be read in the **Comment** window.

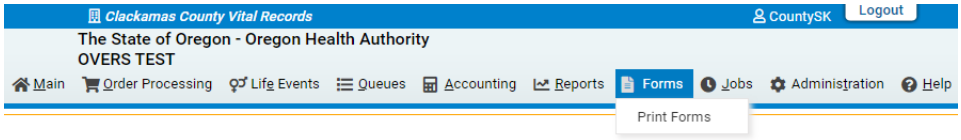
Lengthy comments will have to be opened in order to be read in their entirety. Clicking on the **Edit** link will open the **Update Existing Comment** window for you to view and, if necessary, edit the comment.



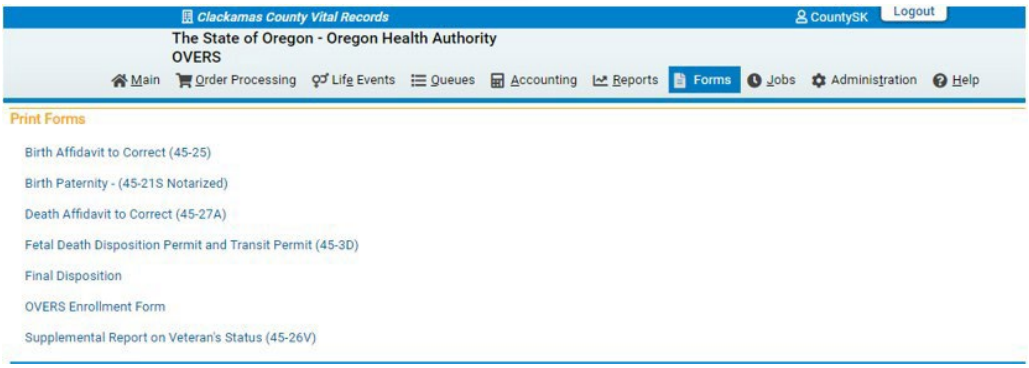
The ability to Edit or Delete comments is determined by the individual user's security configuration. You may not be able to Edit or Delete existing comments.

Print Forms

A variety of forms can be printed from OVERS by clicking on **Forms>Print Forms** from the top menu in OVERS.



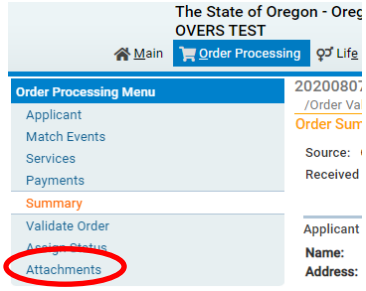
The following forms can be printed from the **Print Forms** option in OVERS.



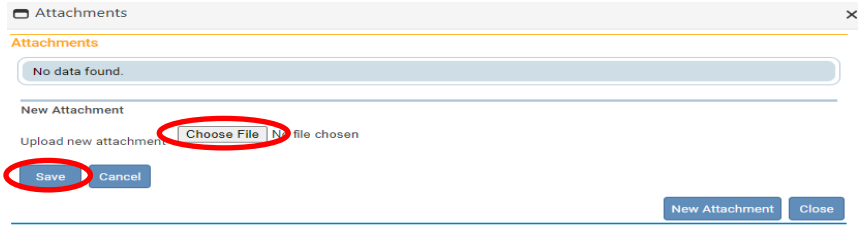
Attachments

OVERS has the option to attach documents to orders. Common attachments would be scanned copies of the order form or a copy of the applicant's identification.

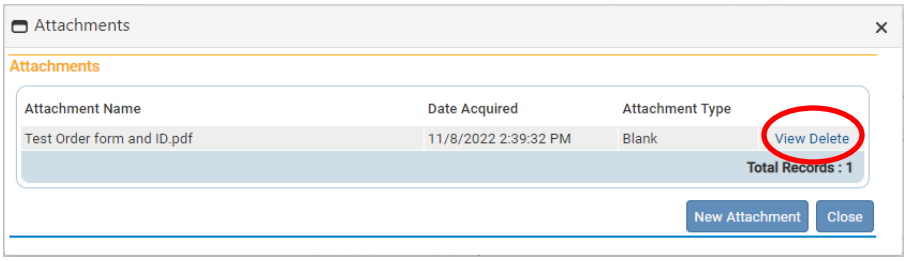
On a New Order select **Attachments** from the Order Processing Menu. If you are viewing a Fast Order, click the **Take me to regular order** button to see this menu.



Click **New Attachment**. Then click **Choose File**, select the file to be attached and click **Save.**



Click **View** to download an attachment or **Delete** to remove an attachment.



2 Issuing Certificates

This chapter aims to explain the data entry process for creating orders and issuing vital records from OVERS. For additional instruction or technical support, contact the OVERS Help Desk during normal business hours (*Monday – Friday, 8 am to 5 pm*) at 971-673-0279.

Eligibility

Before issuing a record, you must determine if the applicant (person purchasing the record) is eligible to receive the record. Who can order depends on the type of record being issued. Individuals not named on the record must provide proof of eligibility. For example, a sister ordering a death certificate for her brother would need her birth certificate showing the same mother as the decedents' mother.

The county can only issue records for events that occurred in the last six months. See Oregon Revised Statute (ORS) 432.380 about issuing certified copies of vital records.

Who can order a Birth Record?	Who can order a Death Record?
• Mother • Father or 2nd parent if listed on record • Stepparent if married to a parent listed on the birth record and child is under age18 • Registered domestic partner of the mother • Grandparent as long as their child is listed on the record • Siblings age 18 or older need birth certificate as proof of eligibility • Legal representative with documentation of whom they represent and why they are ordering • Government agencies with documentation and why they are ordering • Legal Guardian with documentation of legal guardianship paperwork • Non-eligible person with a notarized permission note from an eligible person. Evidence of eligibility required.	• Current husband/wife/spouse • Parent • Child if 18 or over • Grandparent • Grandchild if 18 or over • Sibling • Registered domestic partner • Legal guardian • Government agency • Legal representative of an immediate family member • An agency or person who demonstrates a personal or property right reason-short form only • Non-eligible person with a notarized permission note from an eligible person

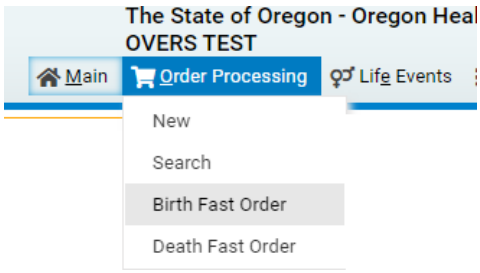
Identification

Once you have determined that the applicant is eligible then you must properly ID them. Every order must include ID for the applicant and, if someone has been authorized by the applicant to pick up certificates on their behalf, their ID needs to be documented as well. The ID must be documented in **Comments** or added as an **Attachment** to the order. This includes orders from funeral directors.

A list of valid ID types can be found at: https://www.oregon.gov/oha/PH/BIRTHDEATHCERTIFICATES/GETVITALRECORDS/Documents/iddocs.pdf

Start an Order

To start an order for a vital record, access the order processing menu by clicking **Order Processing** on the Main Menu navigation bar. The **Order Processing** drop-down will open where you can select the type of order you will be entering.



There are two ways to create an order in OVERS: a New (Long) Order and the Fast Order.

- If you are processing an Order in which there happens to be more than one Record being requested, you will want to use the New (Long). For example, a Funeral Home is requesting three different Records in one Order.
- If you are processing an Order in which only one Record is being requested, then you can use the Fast Order to Process the Order. For example, a family member is requesting a few copies of a decedent's Death Record.

Fast Orders

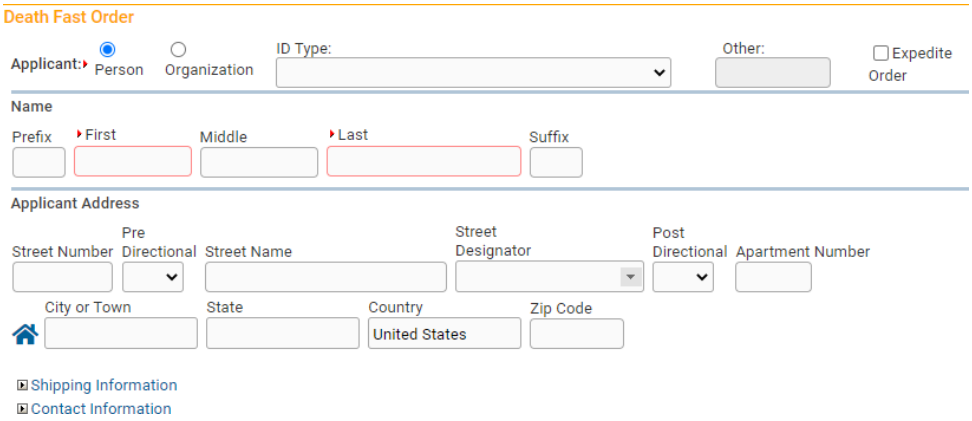
While fast orders allow you to enter an order quickly by providing all the data entry on one screen, there are limitations to entering orders using this method. Namely, the fast order process can only be used for orders that include the purchase of only one registrant's record. Remember, if an order is for two or more registrant records the long ordering method is suggested.

The fast order for a birth certificate is started by selecting **Birth Fast Order** from the **Order Processing** submenu.

For death certificates the fast order is started by selecting **Death Fast Order** from the **Order Processing** submenu.

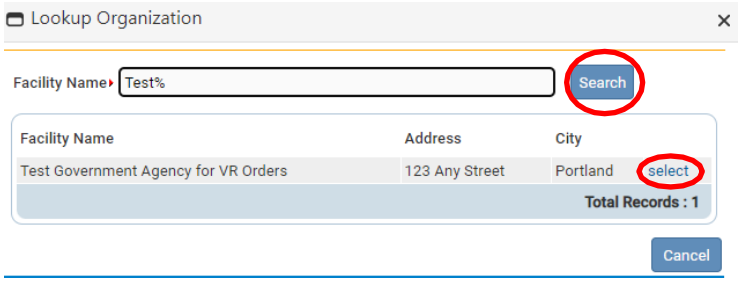
Applicant

The Applicant information is listed at the top of the page for a Fast Order.



There are two radio buttons at the top of the page: **Person** and **Organization**. Organization should be selected when Funeral Homes or other governmental agencies request vital records. If **Organization** is selected, the **Name** fields will be replaced by an **Organization** field. Type in the name of the Organization or click on the lookup tool to find an Organization in OVERS. Using the lookup will automatically populate the address fields.

Type in the name of the facility and click **Search**. You can type in a few letters of the facility name and use the wildcard (%) to quickly find what you are looking for. Click Select to add the facility to add the Name to the Fast Order.



If **Person** is selected, key in all the applicable text entries for **Prefix, First** name, **Middle** name **Last** name, and **Suffix**.

Next, choose the **ID Type** used by the applicant from the drop-down list. Details about the ID presented by the applicant must be added as a **Comment** or included as an **Attachment** to the order.

The **Expedite Order** checkbox is only used when a credit card is used for payment and an extra fee is charged.

Address Fields

Key in the applicable text entries for the **Address** fields. This address will be used for reference and in some cases for delivery of the certificate. The address for organizations that are in the OVERS database will be automatically populated.

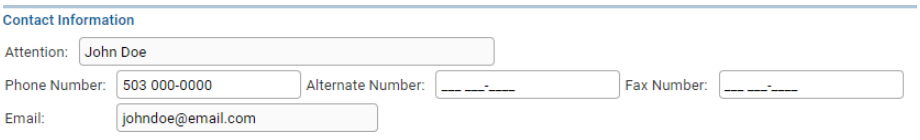
If the street address has a **Pre- or Post-Directional** indicator, (i.e. *East* 42nd St.) then indicate that using either the **Pre- or Post-Directional** drop-down list. Do NOT type the **Pre- or Post-Directional** indicator in the **Street Name** text box.

Shipping Information

If the record will be shipped to a different address than the applicant's address, click on the Shipping Information link and a new **Shipping Information** section will display. Complete the **Shipping Information** section with the recipient's name and address.

Contact Information

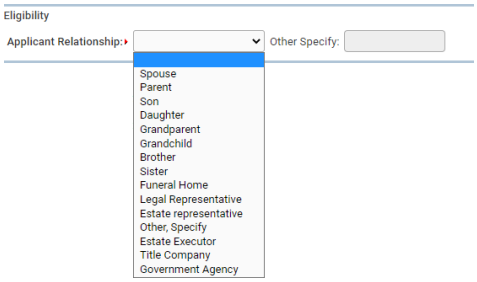
Contact information is entered by clicking on the **Contact Information** link. Enter in whose attention the certificate will be sent to as well as phone numbers and an email address for the applicant. This information is important and makes it easier to contact the customer if any follow-up is needed on the order.



Eligibility to Order a Record

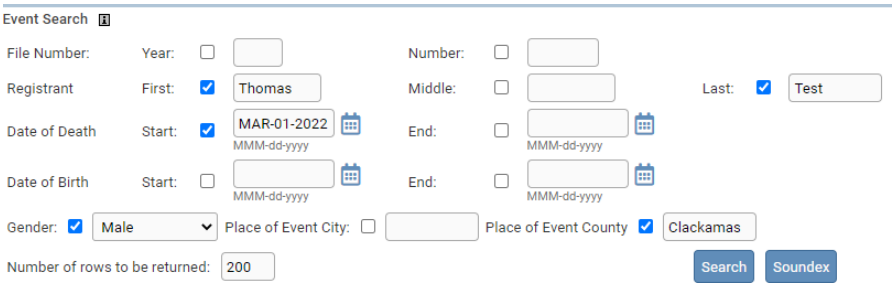
In the **Eligibility** section, select the applicant's relationship to the registrant from the **Applicant Relationship** drop-down list. If the applicant's relationship to the registrant is not included in the list, select **Other** and then manually complete the **Other Specify** control. Not all of the relationships listed will necessarily be eligible to receive a copy of the Certificate. This is especially true when using the **Other** option.

Please note, that the list of options for the Applicant Relationship is different for birth records than for death records.



Event Search and Match

In the **Event Search** section, enter the search criteria for finding the certificate.



The **OVERS** application does not require all search elements to be keyed when searching for a record. However, OVERS serves as an electronic order form and all information that was provided on the order form should be entered in the **Event Search** section. Only records where the **Place of Event** occurred in your county will be available in the **Search Results**.

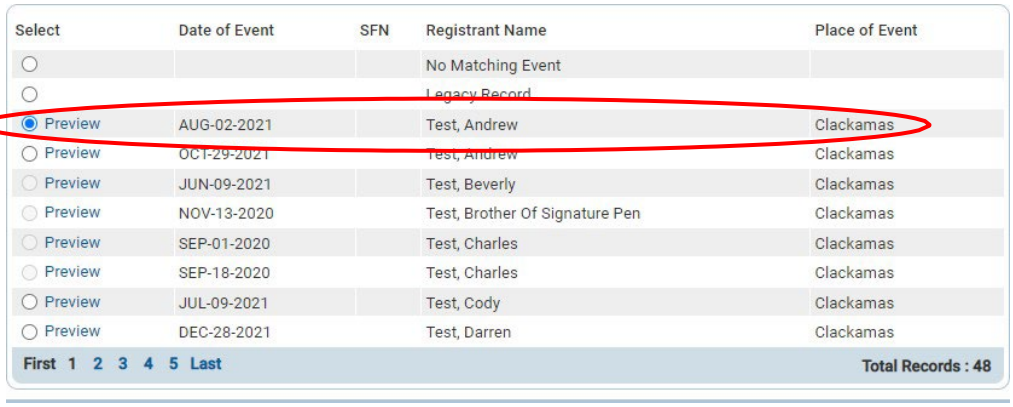
Because order request applications often contain inaccurate or missing information the **Event Search** section provides checkboxes next to each item. These checkboxes can be selected to indicate which items should be included in the search. **OVERS** will only look for matches on those elements that have been checked. If an element has a check selected but the field is left blank **OVERS** will automatically remove the selected check and the item will not be used as search criteria.

The **Event Search** section also provides the ability to search for an event by date range when the exact date of event is not known. To search by date range both the **Start** date and **End** date must be entered. If only the **Start** date is entered, then an exact match on date will be performed.

The **Event Search** section also provides the ability to perform a **Soundex** search. **Soundex** is useful when you are unsure of the spelling of the applicants **First** or **Last** name. **Soundex** looks for similar sounding names.

Once the desired search criteria have been entered, click on the **Search or Soundex** button to perform a search and retrieve a list of matching records.

Search Results



Select	Date of Event	SFN	Registrant Name	Place of Event
○			No Matching Event	
○			Legacy Record	
◉ Preview	AUG-02-2021		Test, Andrew	Clackamas
○ Preview	OCT-29-2021		Test, Andrew	Clackamas
○ Preview	JUN-09-2021		Test, Beverly	Clackamas
○ Preview	NOV-13-2020		Test, Brother Of Signature Pen	Clackamas
○ Preview	SEP-01-2020		Test, Charles	Clackamas
○ Preview	SEP-18-2020		Test, Charles	Clackamas
○ Preview	JUL-09-2021		Test, Cody	Clackamas
○ Preview	DEC-28-2021		Test, Darren	Clackamas

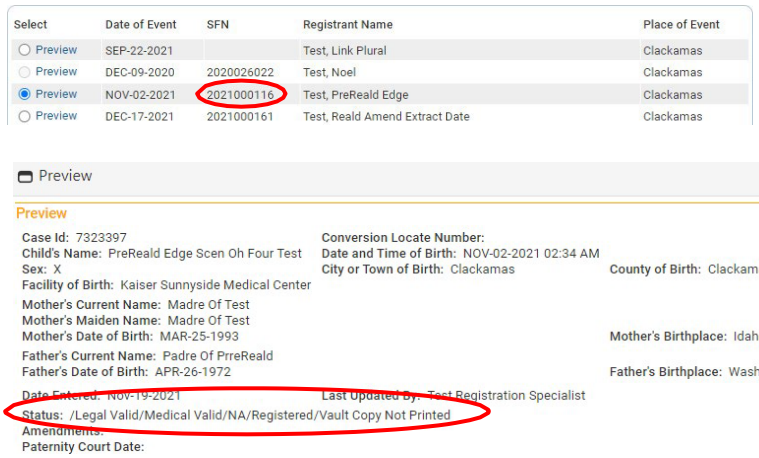
First 1 2 3 4 5 Last — Total Records : 48

The system will list records that are potential matches to the search criteria that were entered in the **Event Search** section.

To view the details of any of the records listed, click on the **Preview** link next to the record. This allows you to examine the details of a record to ensure that you have found the correct one.

Previewing Record Status – When selecting an event, you must check the status of the vital record(s) being ordered because the status will indicate if a record should be issued or not. There are certain circumstances under which you should not release a record and you will only know that by reviewing the status bar.

Birth Records-Only birth records that are registered with the state and have a first and last name listed for the child on the record can be issued. You will know that a record is registered because it will have a State File Number (SFN).



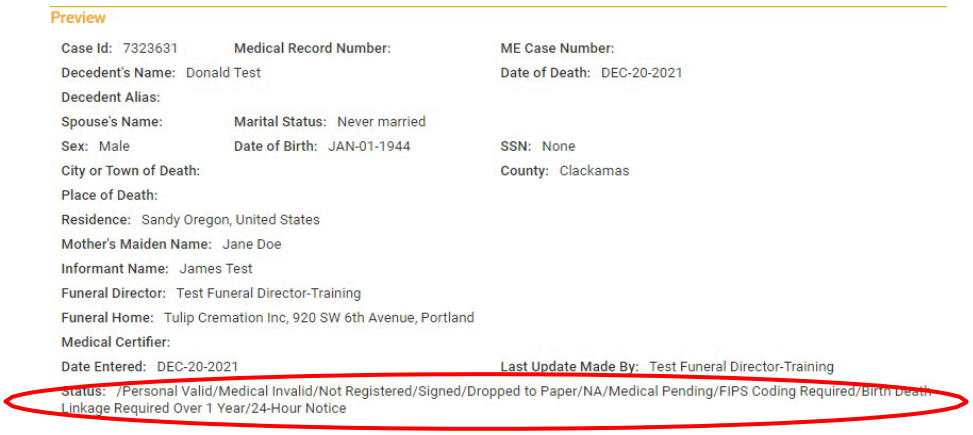
Select	Date of Event	SFN	Registrant Name	Place of Event
Preview	SEP-22-2021		Test, Link Plural	Clackamas
Preview	DEC-09-2020	2020026022	Test, Noel	Clackamas
Preview	NOV-02-2021	2021000116	Test, PreReald Edge	Clackamas
Preview	DEC-17-2021	2021000161	Test, Reald Amend Extract Date	Clackamas

Preview

Preview

Case Id: 7323397
Child's Name: PreReald Edge Scen Oh Four Test
Sex: X
Facility of Birth: Kaiser Sunnyside Medical Center
Conversion Locate Number:
Date and Time of Birth: NOV-02-2021 02:34 AM
City or Town of Birth: Clackamas
County of Birth: Clackamas
Mother's Current Name: Madre Of Test
Mother's Maiden Name: Madre Of Test
Mother's Date of Birth: MAR-25-1993
Mother's Birthplace: Idaho
Father's Current Name: Padre Of PrreReald
Father's Date of Birth: APR-26-1972
Father's Birthplace: Washington
Date Entered: NOV-19-2021
Last Updated By: Test Registration Specialist
Status: /Legal Valid/Medical Valid/NA/Registered/Vault Copy Not Printed
Amendments:
Paternity Court Date:

Death Records-There are three types of death records: fully electronic, hybrid and paper. Fully electronic records must be registered at the state and have a State File Number to be issued. Hybrid and paper death records can be issued if you have the legally sufficient death record in your hand. Legally sufficient means that all required fields have been filled in on the record. The record must be signed by the funeral director and the medical certifier. For Hybrid records, the status line will show that the record was Dropped to Paper. Fully paper records will not show a matching event. These orders must still be entered in OVERS.



Preview

Case Id: 7323631
Medical Record Number:
ME Case Number:
Decedent's Name: Donald Test
Date of Death: DEC-20-2021
Decedent Alias:
Spouse's Name:
Marital Status: Never married
Sex: Male
Date of Birth: JAN-01-1944
SSN: None
City or Town of Death:
County: Clackamas
Place of Death:
Residence: Sandy Oregon, United States
Mother's Maiden Name: Jane Doe
Informant Name: James Test
Funeral Director: Test Funeral Director-Training
Funeral Home: Tulip Cremation Inc, 920 SW 6th Avenue, Portland
Medical Certifier:
Date Entered: DEC-20-2021
Last Update Made By: Test Funeral Director-Training
Status: /Personal Valid/Medical Invalid/Not Registered/Signed/Dropped to Paper/NA/Medical Pending/FIPS Coding Required/Birth Death Linkage Required Over 1 Year/24-Hour Notice

The list of status terms in Chapter 1 describe what each phrase on the status bar means and which terms indicate that you should not issue a record. Note that the terms for a birth certificate will be different than the terms for a death certificate.

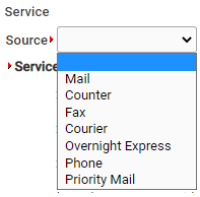
Select a Match

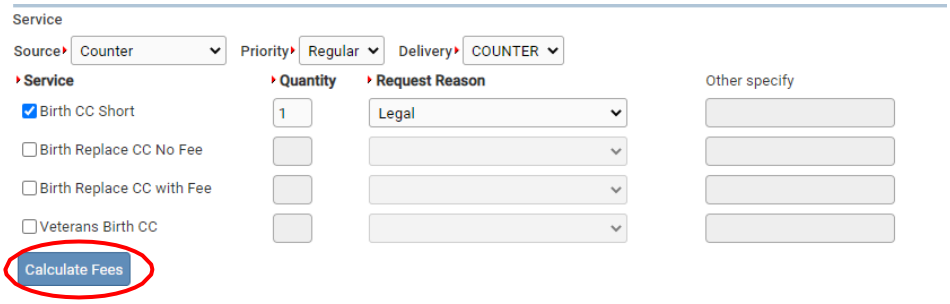
In the Fast Order entry process, there is no Save selection available to designate the Record as a match, instead selection of the radio button to the left of the record selects that record as the matched event.

After selecting a matching event, choose the service to be provided.

Services

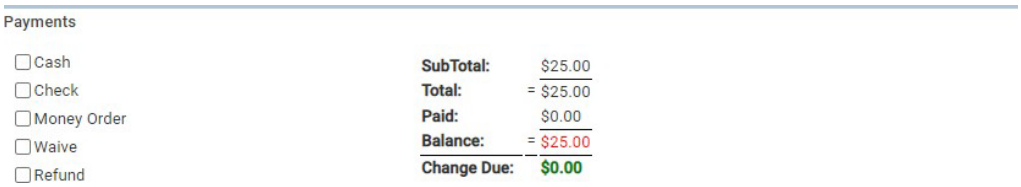
Select a source from the **Source** drop-down; select a priority from the **Priority** drop-down (the priority will always be regular) and select a method of delivery from the **Delivery** drop-down.





Click the checkbox next to the service(s) associated with this order and enter the quantity desired for each service in the **Quantity** text box. Select a reason from the **Request Reason** drop-down.

Once these steps are completed, click the **Calculate Fees** button. The page will refresh and the fees will appear in the **Payments** section directly below the Services section.



Payments

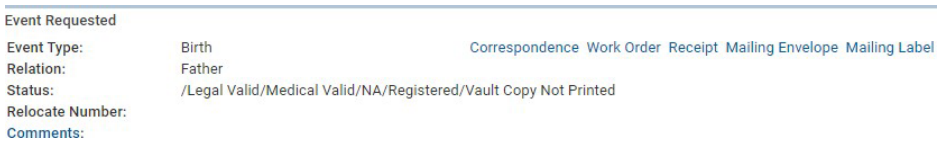
Click the checkbox next to the payment type and enter the payment amount. If a check or money order is used as payment, enter the check or money order number. If **Waive** or **Refund** are selected as payment types, then the reasons that the fee is being waived or refunded must be entered from the drop-down options.

Once the payment is entered, the page will refresh showing the payment and updating the **Balance** due. If there had been an overpayment, as would be the case if a customer offered a $50 bill to pay a $25 balance, the amount due back to the customer would be displayed in the **Change Due** line.

The fee is for the search and not for the record. The fee cannot be waived if no record is located.

Event Requested

The Event Requested section is a summary of the order and provides access to issuing the requested record. At this point you will want to Validate the Order ensuring completeness and accuracy of the Order information which is used to determine if the Record can be Issued.



Save & Validate

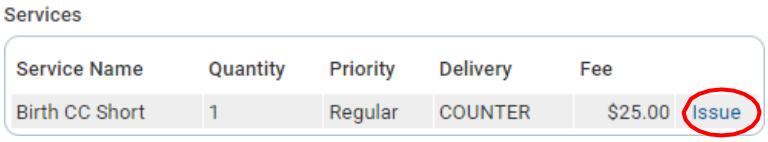
To Validate the Order, select the **Save & Validate** button.

Selecting the **Save & Validate** button will cause two things to occur:

- The Order Number will be assigned to the Order and the Order itself will now be Saved in the System. This means that if you should need to leave this Order before Issuing and Completing it you will be able to find it in the System at a later date and Issue and Complete the Order as needed.

- The Order will run through a Validation process ensuring that the requested Record can be Issued. The Validation process checks many details of the Order such as, Applicant Eligibility, Status of the Record, Received Payments and completeness of the Order to determine if the Record can or cannot be Issued.

If the Order passes all Validation Rules the Issue link next to the Service(s) selected will be made available.

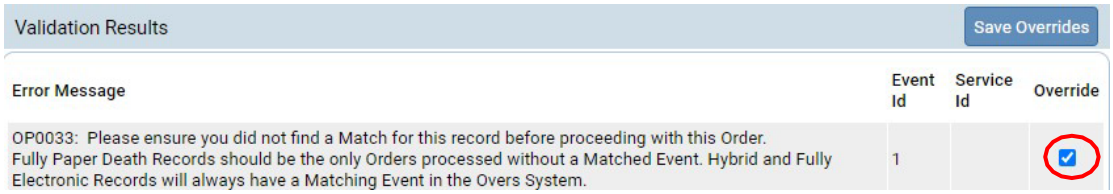


Validation Results

If the order contains incomplete data or errors the validation process will trigger error messages (edit rules) which will appear at the bottom of the page. To issue the record, you must either correct the errors or override the error message.

To correct the errors, simply review the error message and then correct the issue that is described. You may determine after reviewing the error message that the Issuance should not occur, for example if the Record is not yet Registered. In this case you can copy the Order Number down and access it later to complete the Issuance after the Record has fact been Registered.

If an order has errors that can be overridden, a checkbox will appear in the **Override** column. If you wish to override the error message so you can Issue the Record as is, click the override checkbox and click the **Save Overrides** button. Click the **Save & Validate** button again to re-validate the Order. This signals to the System that you have Overridden the error message but will Issue the Record as is.



Fully paper and hybrid death records will have an error that needs to be Overridden to issue the record. To issue a certificate you will need a legally sufficient record in hand.

Order Status

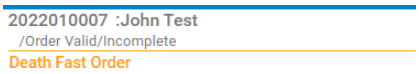
You can also check the status of an order just like you can check the status of a vital record. The Order will be placed in several different Statuses based on the results of the Validation Rules that are triggered. The Order Status is divided into two sections denoted by a forward slash (/). The first word in the Status indicates whether a Validation Error Message has been triggered in the Order. The second word in the Status indicates why the Issuance of the Record cannot be completed or if the Issuance has not been completed.

An example of some of the Order Statuses you may see:

Order Status	Definition
Keyed/Incomplete	This status is assigned when the order is started and not yet validated. The Issuance is incomplete until the 'complete' link is clicked on the issuance page.
Order Invalid/Registration on Hold	This status is assigned when a validation error message has been triggered. The issuance cannot be completed because there is a hold on the registration.
Order Invalid/Insufficient Funds	This status is assigned when a validation error message has been triggered. The issuance cannot be completed because the order does not list sufficient payment.
Order Invalid/Certificate Not Found	This status is assigned when a validation error message has been triggered. The issuance cannot be completed because there is no matching event associated to the order.
Order Valid/Incomplete	This status is assigned when the order has reached a valid status; no validation error messages have

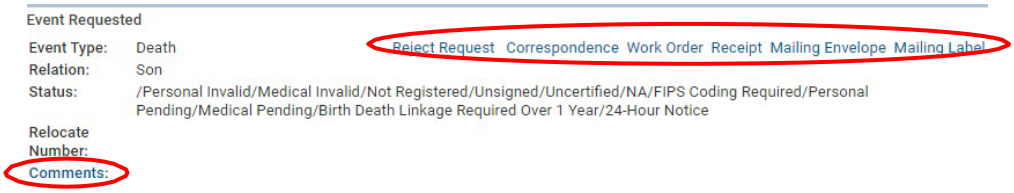
	been triggered but the issuance is incomplete until the 'complete' link is clicked on the issuance page.
Order Valid/Complete	This status is assigned when the order has passed all validation and all issuances have been completed.

To see the Order Status that is assigned simply click the Order Number located at the top of the Order Summary Screen (or at the top of the Fast Order Processing Page).



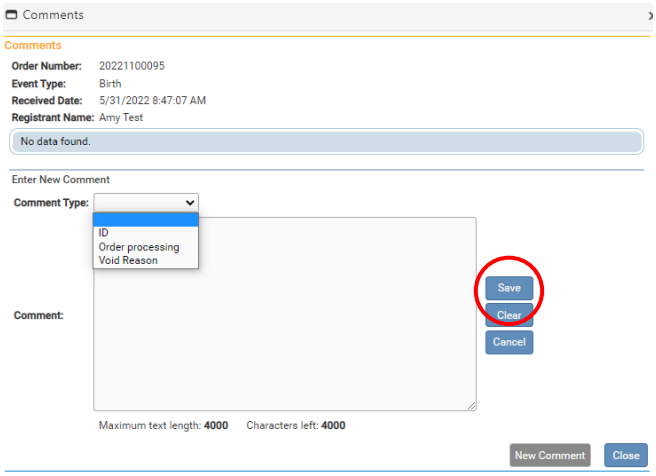
Event Requested – Other Links

There are several other links in the Event Requested Section: **Comments**, **Reject Request**, **Work Order**, **Receipt**, **Mailing Envelope** and **Mailing Label**.



Comments

Clicking on the Comments link will open the **Comments** pop-up box. Click the **New Comment** button and select a **Comment Type** from the drop-down. Type in your comment and click **Save**.

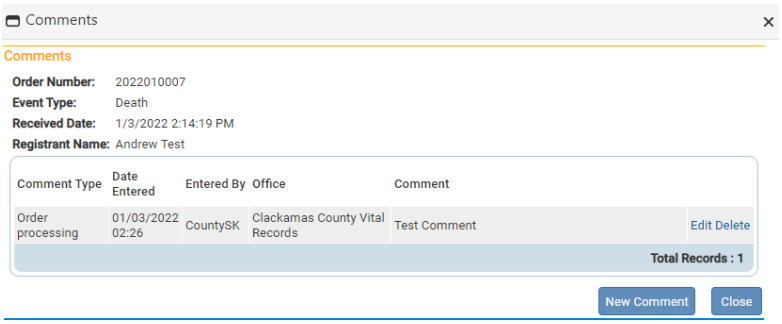


The **ID** comment type is used to enter the identification provided for this order. The comment should contain either the type of ID, issuing authority, and identification number **or** the barcode number on the ID (entered using a barcode scanner) **or** if ID is on file, staff may enter "Applicant ID on file" or "Picked up by [name], ID on file".

The **Order Processing** comment type is used to enter any information you want saved about this order. This comment type will appear on the Summary page of the order.

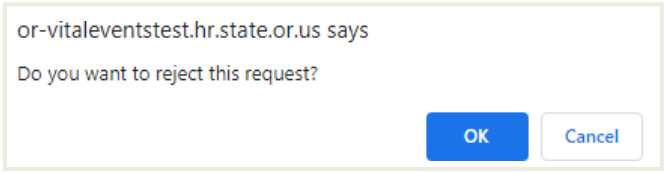
The **Void Reason** comment type is used to document why an ordered was voided.

Your comment will appear in Comments window. You can edit or delete your comment or add additional comments to the record if needed. Click **Close** when finished adding or editing comments.



Reject Request

Occasionally, it may be necessary to reject an applicant's request for a certificate or other service, as would be the case when the applicant is not eligible to receive the document. In these cases, you would reject the request by following these steps clicking the **Reject Request** link in the Event Requested section. A popup window will ask Do you want to reject the request? Rejecting a request cannot be undone so if you are sure you want to reject the request, click the **OK** button. Otherwise click the **Cancel** button.



The **Event Requested** page will refresh. Notice that the **Reject Request** link will be replaced with a **Rejected** label.

Work Orders

Sometimes you may not be able to tell from the onscreen information whether or not you are looking at the right record. Or perhaps you may be dealing with a record that is not in the **OVERS** database. In cases like these, you can print out a work order assist in performing a manual paper search.

To print a work order, click on the **Work Order** link. A **File Download** dialog box will open. Click on the **Open** button to open the **Work Order** for printing. Click **Cancel** to close the **File Download** dialog box without printing.

Receipt

Sometimes your customers will require a receipt to demonstrate that they have paid for services rendered. It may even be a requirement in your office to provide a receipt.

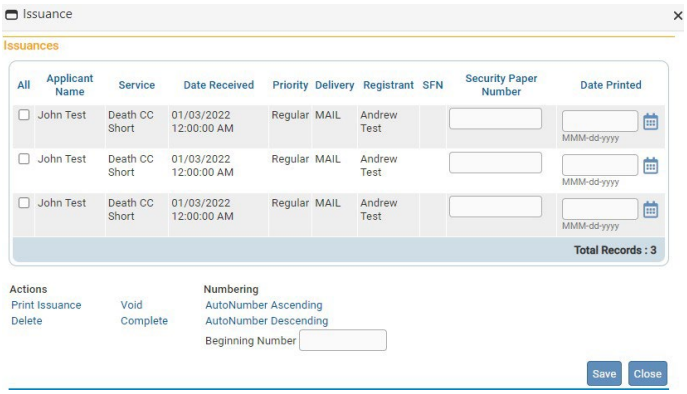
To print a receipt, click on the Receipt link. A **File Download** will appear. Click on the PDF document to open it and then print it to give to your customer.

Mailing Envelope and Mailing Label

OVERS can generate a document template for an envelope or mailing label. Click on the corresponding link in the Events Requested section and a PDF document will be generated that has the customer's name and address listed that you can print onto an envelope or label.

Issuance

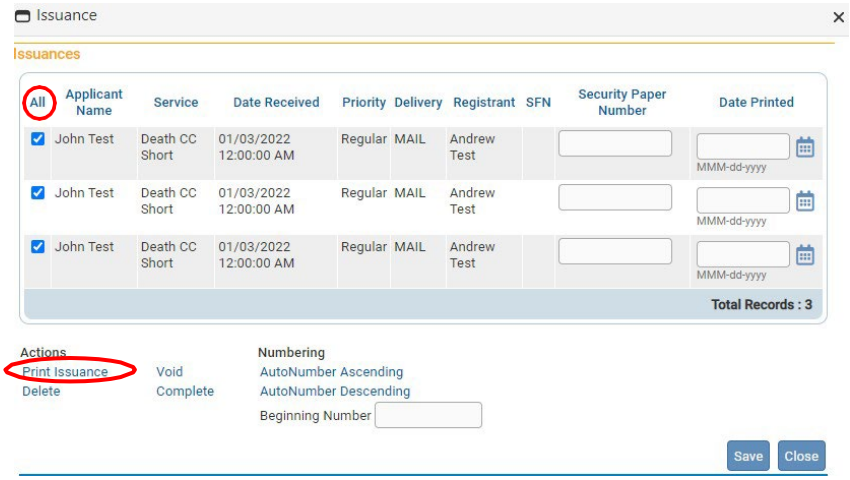
To issue the record associated with this order, click on the Issue link in the services table of the Event Requested section. The Issuance pop-up window will open.



The **Issuance** pop-up window is used to print certified copies of records. Note that all the column headers are bolded. This indicates that the headers can be used to re-sort the table of information by clicking on them.

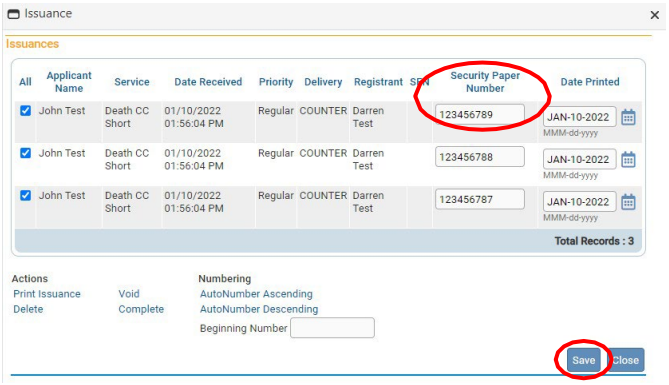
To print a certificate, follow these steps:

1. Place a checkmark in the checkbox next to the issuance(s) you want to print. If you want to print all issuances select the **All** link at the top of the checkbox column.



2. Next, select the **Print Issuance** link to print the issuance(s) you have selected. Selecting the **Print Issuance** link will auto-fill the **Date Printed** with the current date and then launch the Windows file download dialog box. Click on the download to open the forms .pdf file for records that are completely in OVERS and then print the certificate(s) from your browser. Make sure to print the certificate on intaglio (security) paper. If you have a legally sufficient fully paper or hybrid death record, then copy the paper record onto intaglio paper.

3. Once the record has printed ensure that the items have printed correctly. If the record has properly printed you will need to enter the intaglio (security) paper number. To do this simply input the **Security Paper Number** into the entry box and click **Save**.



If your county has access to a barcode scanner device, you may also use it to quickly and accurately enter a single sheet or multiple sheets of intaglio (security) paper. Simply place the cursor in the box in which you want to enter the number and use the scanner to scan the barcode on the intaglio paper. The number will automatically be entered into the box. Click **Save**.

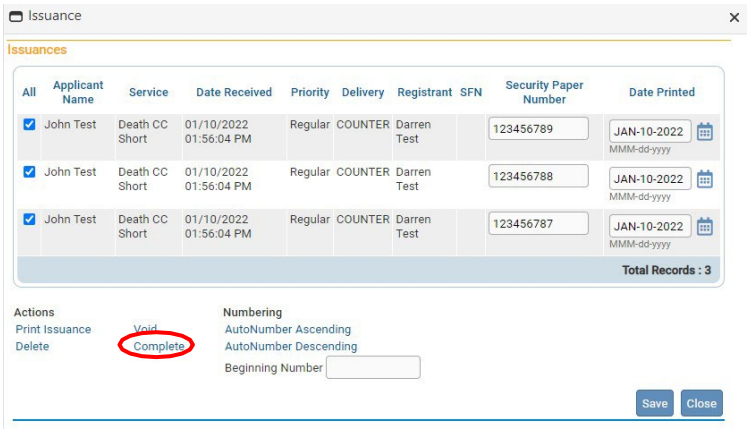
Another way to enter multiple pages of intaglio paper numbers is, the AutoNumber Ascending or AutoNumber Descending functionality. This allows the system to automatically enter the numbers for the Issuances.

Follow these simple steps to use the AutoNumber feature:

- Place a check mark in the **All** column of the records to be updated.
- Enter the starting number in the **Beginning Number** text entry box.
- Click the **AutoNumber Ascending** or **Descending** link to start the numbering process.

4. Once you have printed the certified copy, verified it has printed correctly, and entered the security paper number you will use the **Complete** link to mark the order as completed.

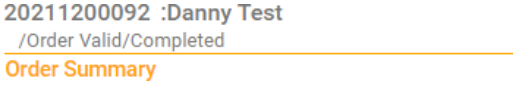
   You must place a check mark in the box located next to the issuance you want to complete. If you want to complete all issuances, then simply click the ALL button at the top of the checkbox column. Once you have selected the issuances you wanted to complete click the **Complete** link. Once you have marked your issuance(s) complete you can close out of the Issuance screen.



5. Click the **Close** button to close the **Issuance Web Page Dialog**.

6. Once the issuances have been marked complete the **Issue** link on the **Summary** page will be disabled and the total number of Issuances will be updated to reflect the Issuances just completed.

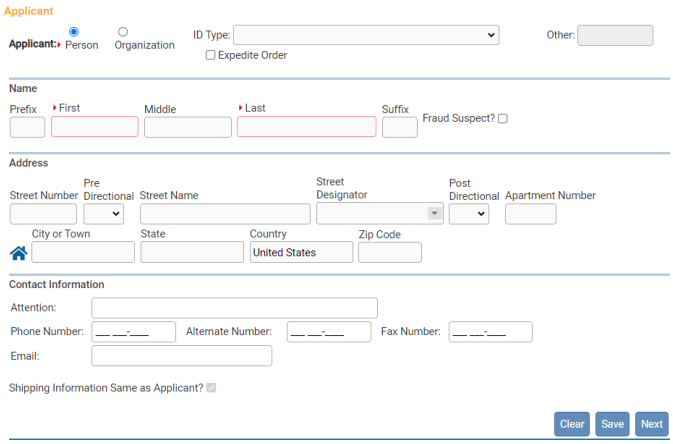
If all issuances associated to the Order have been completed the Order will also receive a status of Order Valid/Complete.



New (Long) Orders

The New (Long) Order is used when two or more registrant's records will be purchased within the same order.

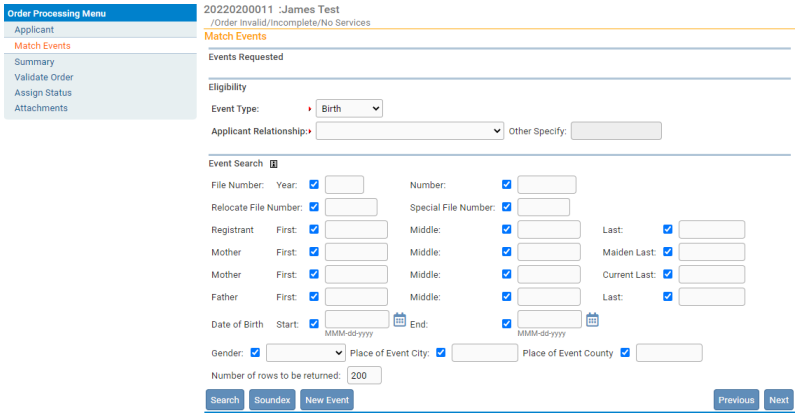
From the **Main Menu** select **Order Processing > New**. You should see the **Applicant** page.



The information required on this page is the same as is required on the top portion of the Fast Order. When all applicable fields have been filled, click the **Next** button to save the data and proceed to the next page, the **Save** button to save the data entered on this page, or the **Clear** button to remove the data entered.

Match Events

After clicking the **Next** button notice that the page refreshes and that the menu on the left changes.



Eligibility

In the **Eligibility** section you will select the Event Type (birth or death) from the drop-down menu. The Event Type defaults to “Birth”. If you change the Event Type to “Death” the page will refresh and the drop-down list for the Applicant Relationship will change.

Select the applicant’s relationship to the registrant from the **Applicant Relationship** drop-down list. If the applicant’s relationship to the registrant is not included in the list, select **Other** and then manually complete the **Other Specify** control.

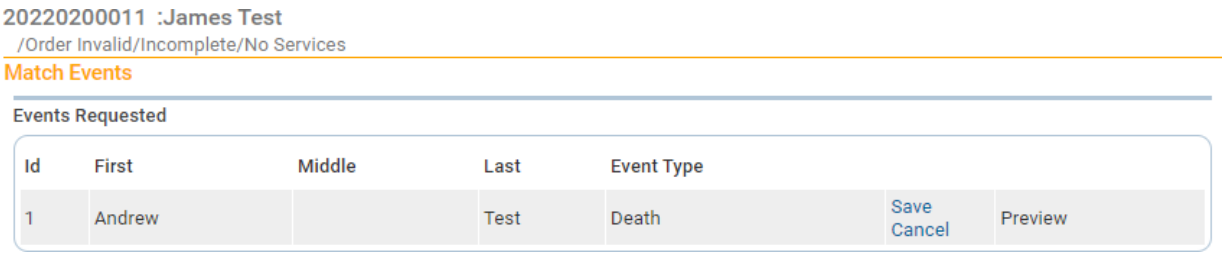
Event Search

In the **Event Search** section, you will enter the search criteria to be used to find the record for which a death certificate or other service is needed. Include all the information that is listed on the order form when searching for a record.

The information required in the **Event Search** section is the same as is required on the Fast Order form.

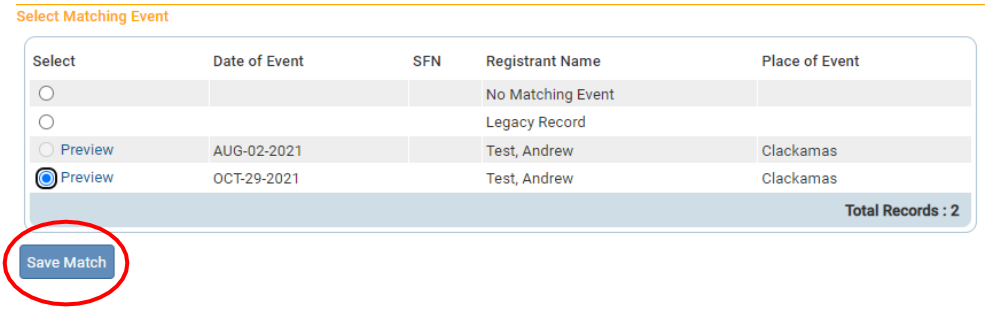
Once all the desired search criteria have been entered, click on the **Search** button or **Soundex** button to perform a search and retrieve a list of matching records.

Once you select the Search or Soundex button the **Events Requested** section will update to show the Criteria and Event Type you just entered to search with. It will label the first Event search attempted with a 1. Each additional Search will number sequentially ascending to allow you to access to the Events Search and Match Results at any time.



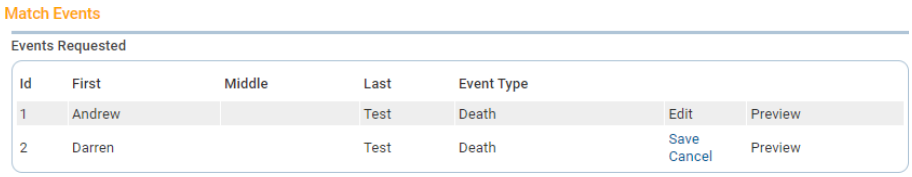
If the search does not return any matching records, click the **New Event** button to clear the data and start over. If the Search does not return any Matching Events either refine your Search Criteria and select to Search again or select the No Matching Event Radial Button. Click the **Previous** button to return to the **Applicant** page.

Selecting **Search** or **Soundex** in will initiate the record search and open the **Select Matching Event** pane, as shown in the following example.



Select the appropriate event from the Select Matching Event section just as was done on the Fast Order. Once you have previewed the record and have determined that it is the correct record and that it can be issued, click the **Save Match** button and then select the **Next** button to continue with the Order or the **New Event** button to add an additional Event Record to the Order.

To add additional Events to the Order, select the **New Event** button. Selecting the **New Event** button will refresh the **Match Event** page and allow you to **Search** for a new Event Type and match to a new record. Follow the same steps above to search for the additional record to be processed with the order. As soon as you select the **Search** or **Soundex** button for the new event the **Events Requested** will be updated to reflect the search criteria used and the event Type searched by. The Match Events section with two different records is shown below.

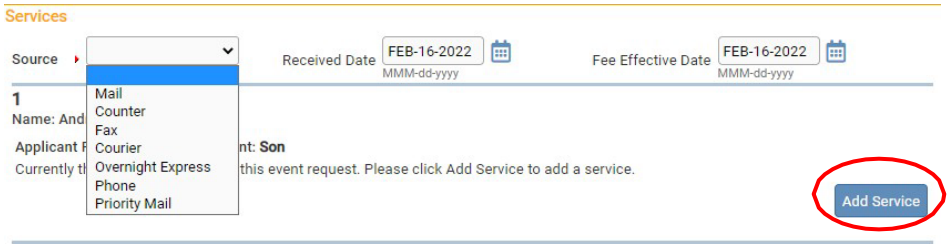


Selecting **Edit** will allow you to edit the search criteria for the event selected. Selecting **Save** will save any changes made to the event you are working with since the **Search** button was last activated on the Matched Event Page within this order. Choosing **Cancel** will reset any changes made since **Search** button was last activated on this order. Selecting Cancel will reset to the selections to **Edit** and **Delete**.

Once you have saved the matches for the events requested select the **Next** button to proceed with order entry, the **Previous** button to return to the **Applicant** page, or the **Return** button to return to the **Main Menu**.

Services

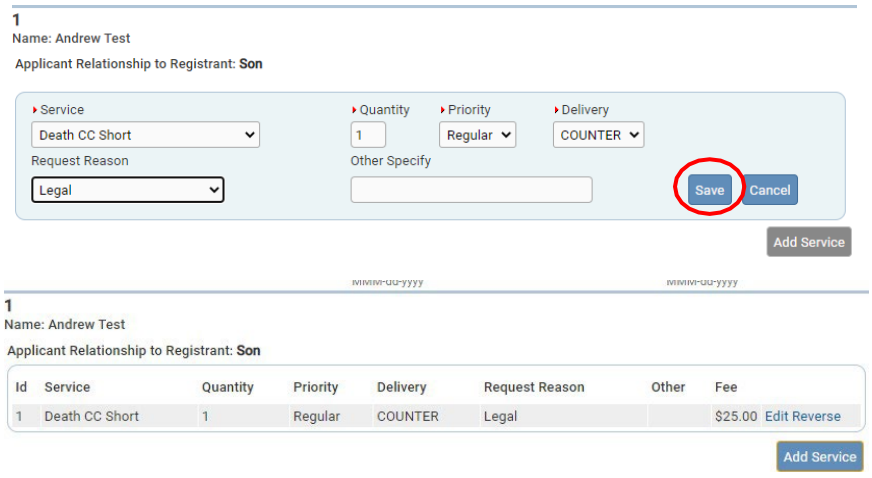
Now that you have saved a matching event(s), it's time to select the desired service. On the **Services** page, locate the **Source** drop-down list. From this list select the method by which the request for service was received and then click **Add Service**.



Use the **Received Date** to enter the date the request was received and the **Fee Effective Date** to enter the date on which the fees are to be applied. Both of these dates are automatically populated with the current day's date when the page is opened.

The Services page lists all the events requested from the previous Match Event page. If there are multiple events requested, then each event requested will need to have services added to them.

After selecting **Add Service**, the **Name** section will expand as shown below. Make a selection from the list of services, enter the quantity desired in the **Quantity** text box, select a priority from the **Priority** drop-down (priority should always be "Regular"), select a method of delivery from the **Delivery** drop-down, select a reason from the **Request Reason** drop-down and then select **Save** to finish your selection or **Cancel** to clear all entries and start over.



If any errors are found in this service request, click the **Edit** link to change the service.

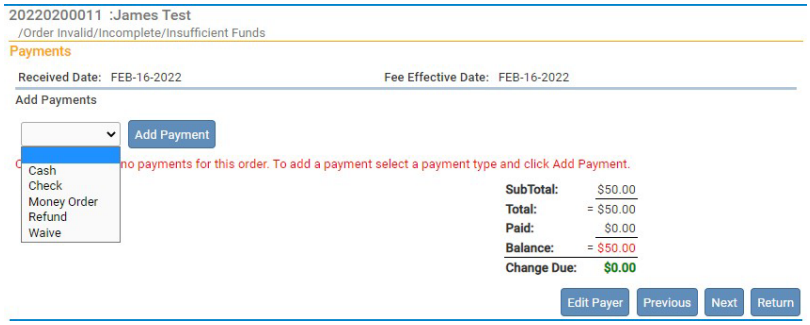
The **Reverse** link can be used in situations where fees have been collected for a

service that has been completed but a determination is later made that the applicant is entitled to a reimbursement of fees paid. If you select the Reverse link after the intaglio (Security) paper number has been added to the selected Issuance for the Service the intaglio (Security) paper number will be voided from the system. This means the paper will no longer be valid and can no longer be used for printing certified copies.

Once you have entered all services the navigation buttons at the bottom of the **Services** tab will be enabled. Select **Save** to save your selections without proceeding, **Previous** to return to the **Match Events** page, **Next** to proceed with your order or **Return** to return to the **Main Menu**.

Payments

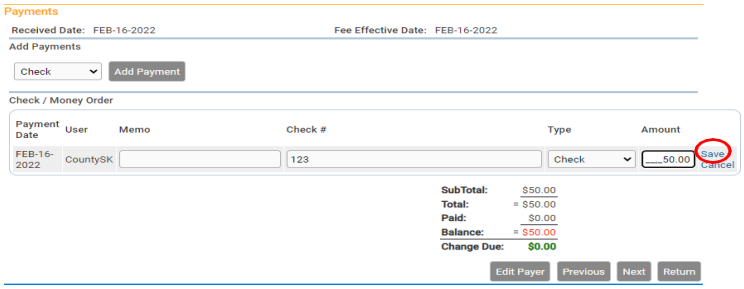
The next step in completing the order is to document any fees that are due. Once the services have been added to the order, the **Payments** page will show a **Balance** due.



To record the payment, select one of the valid payment options from the **Add Payments** drop-down list.

With a payment option selected, click the **Add Payment** button. If the payment method is check or money order enter the **Check #** in the text entry box.

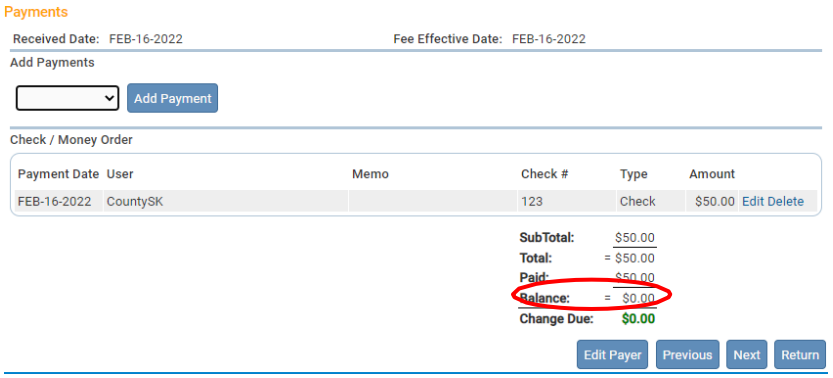
For **Type**, select the appropriate option. In the amount column enter the amount of the check presented and click the **Save** link.



In most cases one payment type will be used to pay the full amount of the **Balance** due. If the payment is split between two payment types, you will need to record the remaining payment by repeating the steps above.

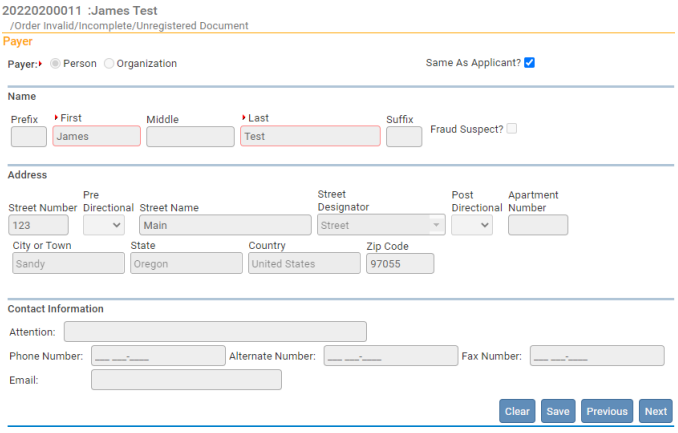
Once the payment is saved the page will refresh showing the updated payment and **Balance** due.

As shown in the image, we have now reduced the **Balance** due to $0. Notice that the navigation buttons at the bottom of the page are now enabled. Select **Next** to proceed to the **Summary** page.



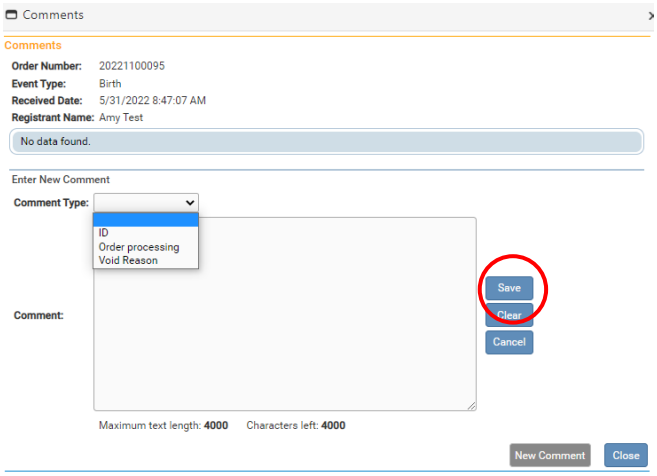
Payer

If the **Payer** and the **Applicant** are not the same person, the payer information can be added. For example, a Funeral Home may request a certified copy on behalf of the surviving spouse. In this event, the **Applicant** is the surviving spouse. However, since the Funeral Home will be presenting payment, they are considered the **Payer**.
If the **Payer** and the **Applicant** are not the same person or entity, then click the **Edit Payer** button. This will allow you to change the **Payer** without also changing the **Applicant**.



Click the **Edit Payer** button to launch the **Payer** page. Complete this page for the Payer and select **Save**. Then, select **Summary** from the **Order Processing Menu** to proceed with the order.

Comments



Identification must be provided for every order. To add the identification provided for this order click on **Comments** on the Summary page. Then click the **New Comment** button and select the **ID Comment Type** from the drop-down. Type in your comment and click **Save**.

The comment should contain either the type of ID, issuing authority, and identification number **or** the barcode number on the ID (entered using a barcode scanner) **or** if ID is on file, staff may enter "Applicant ID on file" or "Picked up by [name], ID on file".

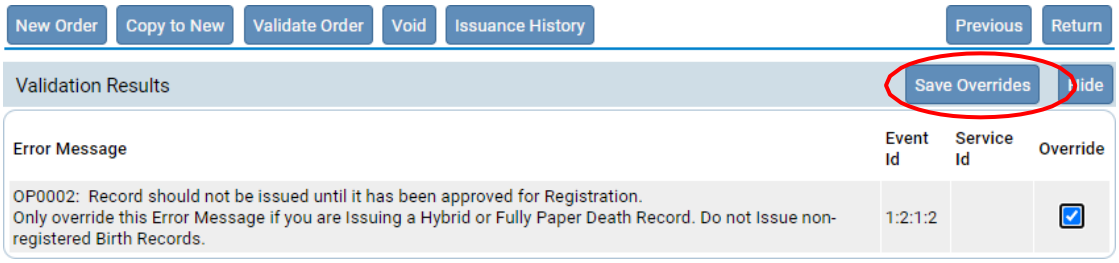
Order Processing is another comment type which is used to enter any information you want saved about this order. This comment type will appear on the Summary page of the order. The **Void Reason** comment type which is used to document why an ordered was voided.

Identification can also be scanned and attached to the order. See page 20 for instructions to attach a file to an order.

Validate Order

Click the **Validate Order** button at the bottom of the **Order Summary** page. This will check your order for errors. If there are no errors reported, then your order is valid and can be processed.

If an order is invalid, you will not be able to issue the vital record until the order is corrected. For invalid orders, an error message or messages will appear at the bottom of the page. If the errors can be overridden, a checkbox will appear in the **Override** column next to the override message. To override the error, click the message checkbox and then click the **Save Overrides** button and validate the order.



If the error cannot be overridden, correct the error return to the **Summary** page and revalidate the order.

Order Summary and Status

The information in the Order Summary section is the same as described on the Fast Order form.

Issuance

The information on the Issuance page is the same as described on the Fast Order form.

Replacement Orders

A Customer may request a replacement copy if their certificate was amended.
The same six-month rule applies, where Counties can only issue certified copies of records for the first six months from the date of event.

Before issuing a replacement copy, you must obtain the original copies from the customer. If the customer does not have the original, then a completely new order must be created at the regular fee for a certificate. Send the State office an email with the security paper numbers of the certificates that need to be voided, and then shred the returned certificates.

The fees for replacement copies vary by the type of record and by the type of amendment.

Birth Certificate Replacements		Death Certificate Replacements	
Type	**Fee**	**Type**	**Fee**
First Replacement	$ 0	Personal Data Amendment	$ 5
Any Additional Replacement	$ 5	Personal and Medical Date Amendment	$ 5
		Medical Amendment Only	$ 0

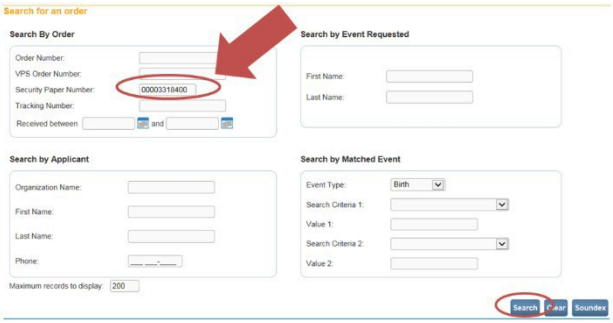
The death certificate is broken down into the Personal section and the Medical section. There is no fee for a replacement if ***only*** the medical portion of the record is amended.

There is no free exchange of long for short or short for long certificates unless an amendment been done.

Issuing a Replacement

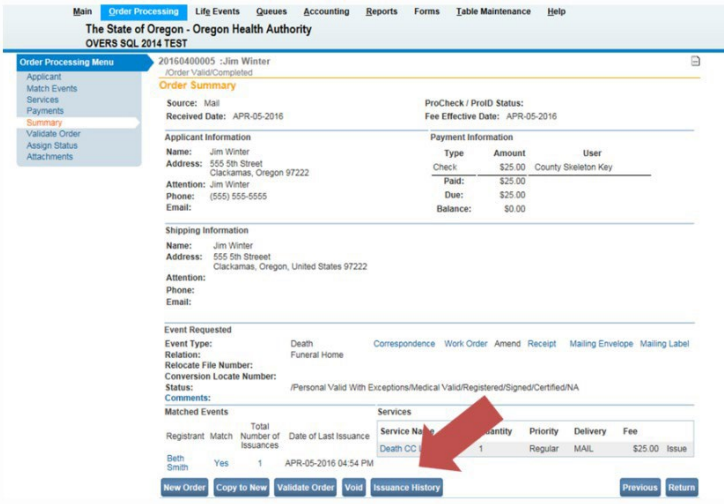
Locate Original Order

To create a replacement order, search for the original order in OVERS. In order to issue a replacement copy, there must have been certificate issued. You can search for an order in four categories: Search by order, Search by applicant, Search by event requested, and Search by matched event. The easiest way to search is by security paper number because the customer will have the original certificate to order a replacement.



Order Summary

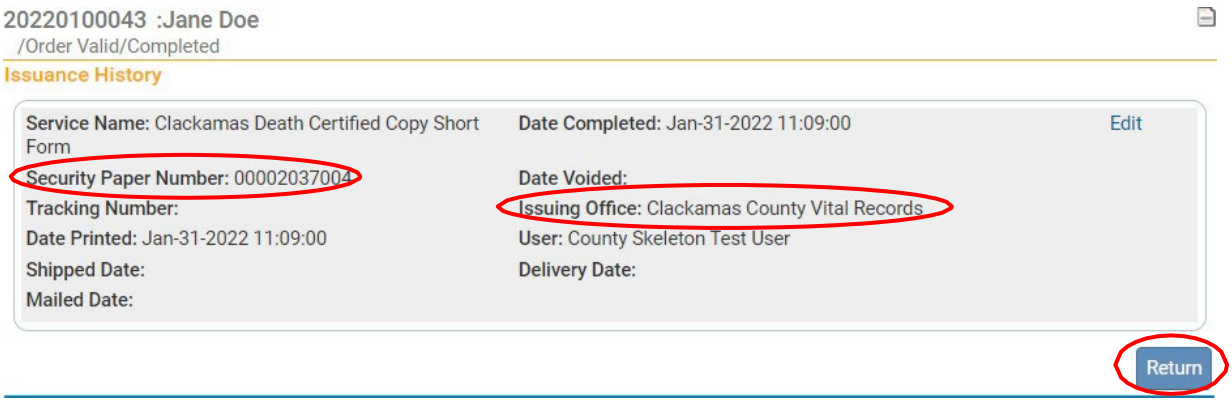
After locating the order number, you are taken to the order summary page. You will see a summary of information about the previous order, such as the status of the order, the applicant information, the certificates issued and their fees, and the event for who the record is for. Click on **Issuance History**.



Issuance History

From the issuance history screen, obtain the security paper numbers of the issued certificates. Take note of these numbers, as they will need to be emailed to CHS.VitalRecords@oha.oregon.gov to be voided. Also, take note of the Issuing Office.

If the previous order was completed at the State Vital Records Office, then a brand-new order will need to be created and you won't be able to "copy" this order, which carries over certain information.

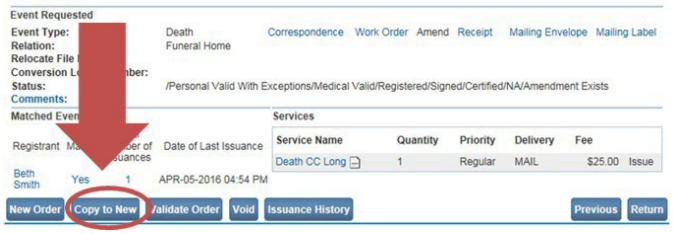


Comments

After taking note of the Security Paper Number and Issuing Office, click **Return** to create an Order Processing comment on the original record. The comment should include how many copies on this order will be replaced and the reason why they're being replaced as well as the initials of the user making the comment. Once the replacement is completed come back to this comment and add the new order number and the new security paper number. This ensures that all the information from the replacement order will be available on the original order. A comment will also be added on the new replacement order.

Summary Page

After entering a comment, you will be taken back to the Summary page. If your office issued the previous order, then click **Copy to New**. This action creates a new order and carries over information from the previous order. If the State office issued the previous order, then click "New Order", and a new order will be created. The only time you would use "Void" is if you made a mistake on the order *after* issuing.



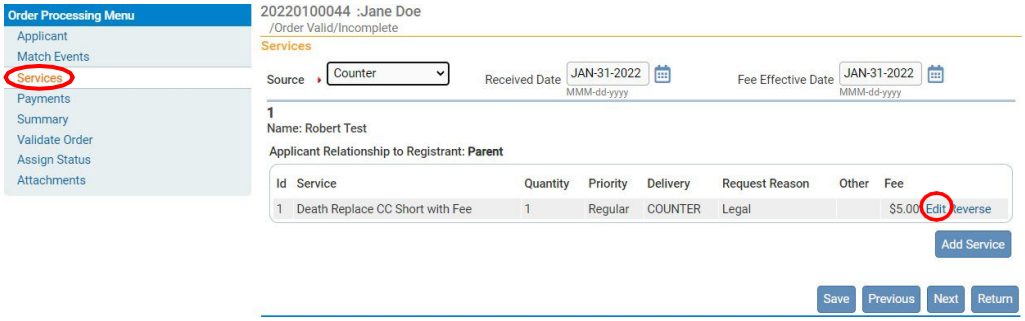
After creating a new order, the status will show as Order Invalid/Incomplete/No Services. Because we performed the "Copy to New" action, information about the applicant and event have been carried over to the new order.

Replacement orders are not in a “Fast Order” format, it is in a “Regular Order” format. A Regular Order has a different look because it separates the screens. You will always see the Regular Format when issuing a replacement because the previous order was complete. Click on the **Services** link.

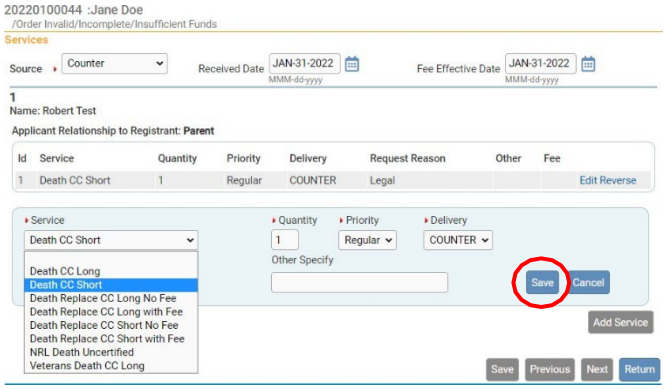
Services

The system will auto-fill some information from the previous order. Confirm the Source information. Leave the Received Date and Fee Effective Date as is. When the customer is requesting a replacement due to an amendment, we want the initial dates of the issuance to remain the same to ensure the customer is charged the appropriate fees.
The service requested on the original order will display.

Click **Edit** to select a replacement service.

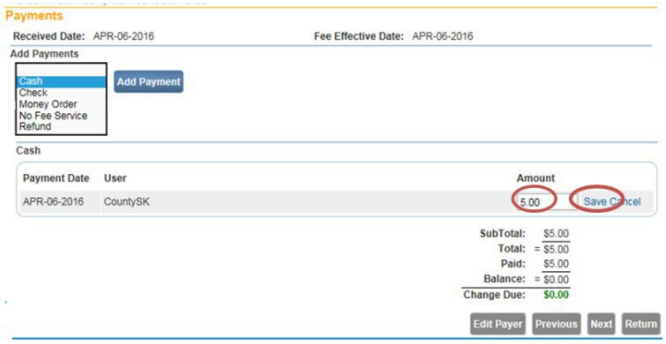


Select the service from the drop-down menu, the quantity, priority, and delivery method. Then click **Save**. You will see a summary of the service(s) you requested. You will also see the corresponding fees displayed. If multiple types of certificates need to be replaced, then click **Add Service**. Click **Next** after all services have been added to be taken to the **Payments** page.



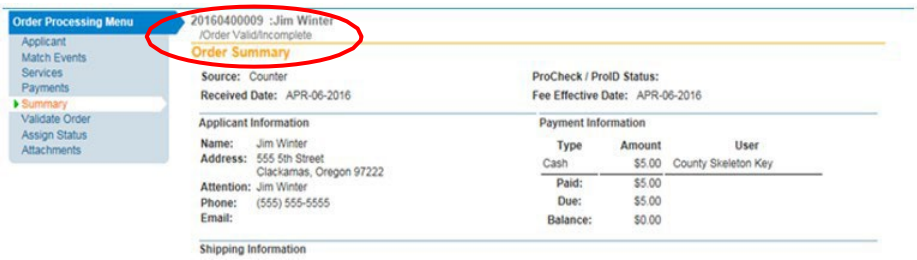
Payments

On the Payments page, click on **Add Payment** and select the payment method from the drop-down and then click **Next**. Enter in the amount the customer paid, if applicable, then click **Save**. If any change is due, that amount will display.



Order Summary Status

After clicking **Save**, you are taken back at the **Order Summary** page, but now you will see a summary of the services you have entered. Notice the order now shows a status of Order Valid and Incomplete. The order is incomplete because we have not yet issued any certificates.



Issuance

Click Issue to print the certificates. The steps for issuing and printing are the same as mentioned previously in the Fast Order section of the manual. Once you have finished printing the certificates, you will notice the order status now says that the order is “Complete”.

Add a comment to the replacement order detailing the original order number and original security paper number(s). Then add a comment to the original order with the replacement order number and the replacement security paper number(s). It is important to have comments on both the original order and the replacement order. This makes it easier to research replacement orders for customers.

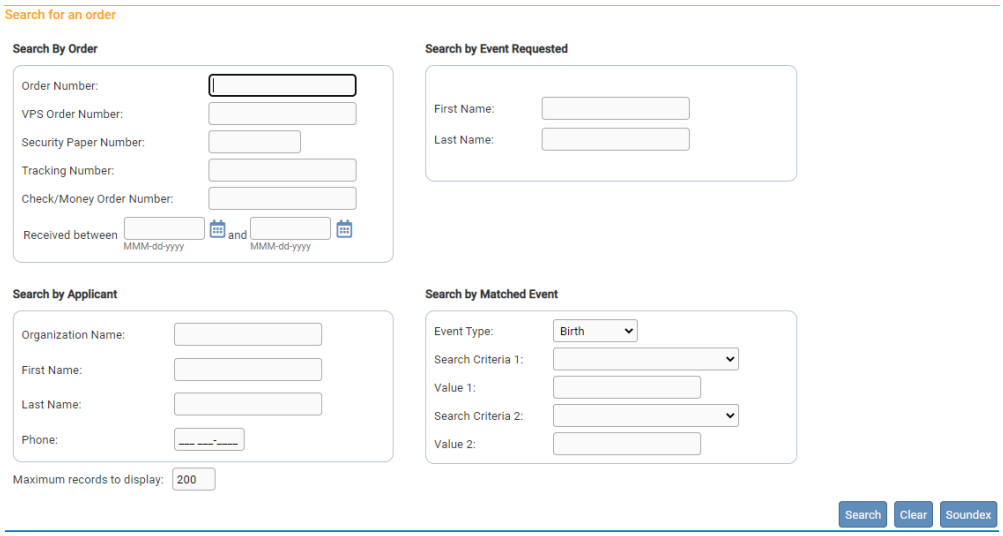
You are now finished issuing a replacement certificate. Make sure you send the security paper numbers that need to be voided on the Tracking Voids Excel spreadsheet to CHS.VitalRecords@oha.oregon.gov on the 1st and 15th of every month. A barcode scanner can be used to easily add the security paper numbers into the spreadsheet.

3 Other OVERS/County Functions

The purpose of this chapter is to cover searching for an order, creating a replacement order, and running cashier close.

Search for an Existing Order

In a previous chapter we went through the steps necessary to create a new **Order**. This section describes how to search for and access a previously entered order. From the **Main Menu,** select **Order Processing > Search**. The **Search for an order** page shown below will open.

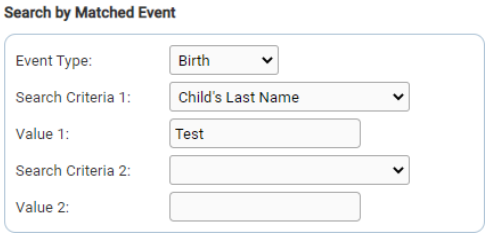


There are four search options to choose from: **Search by Order**, **Search by Applicant**, **Search by Event Requested**, and **Search by Matched Event**.

To **Search by Order**, you must input at least one of the requested pieces of information: **Order Number**, **Security Paper Number**, or **Tracking Number** as shown in this example and click on the **Search** button at the bottom of the page.

To search by **Applicant**, you must input at least the applicant's **Last Name**. However, to reduce the number of orders it is highly recommended that both **First Name** and **Last Name** be used. Supplying additional information such as **Phone Number** and/or **Organization Name** would help to narrow down the results even further. Click the **Search** button at the bottom of the page to proceed.

To Search by **Event Requested**, you must input at least the registrant's **Last Name.** However, to reduce the number of orders it is highly recommended that both **First Name** and **Last Name** be used.



The last way to search for a previous order is by **Matched Event**. To search for an order by the event requested you must first select an event from the **Event Type** drop-down list.

Next, make a selection from **Search Criteria 1** and key in the corresponding value in **Value 1**. For example, if you select **Child's Last Name** for **Search Criteria 1** then you would enter the child's last name in **Value 1**.
You must use at least **Search Criteria 1** with corresponding **Value 1** data.

It is not necessary to use **Search Criteria 2** and **Value 2** – even when searching on **Decedent's First Name**. However, providing more information now will help limit the number of orders returned making it easier to locate the desired order.

Regardless of the search method used, clicking on the corresponding order number will open the **Order Summary** page for that order.

Locate a Vital Record

To locate a record in **OVERS** before starting an order, you can use the top menu and click on **Life Events > Birth (or Death) > Search**.

Once you locate the record, you can preview it to ensure that it is the correct record. You can also click on the highlighted name of the Registrant to review the first page of the record. Once in the record you will only be able to access the Child (or Decedent) page, Comments, and Print Forms (working copies only). These pages provide you the ability to review the Registrant information on the Record, add Comments to the Record and/or Print a Working copy of the birth or death record.

Essentially, the view of a record you can see in the Life Events section of OVERS will provide you with only the information necessary for determining if a record is in the system and for determining if the temporary white copy of the record should be shredded (record is registered in OVERS) or a fully electronic record has been filed for a death in your county.

Security Paper

Security paper (also called Intaglio paper) is sold to the County by the State to be used for the sole purpose of printing certified copies of vital records. Intaglio paper is used to ensure that certified copies cannot be altered without detection and so the distribution, storage and tracking of intaglio paper must be tightly controlled to prevent fraudulent use.

Once you receive an order of intaglio paper, call the State office to confirm you received the paper. The unused paper must be stored in a locked and secure area and each piece of paper used must be tracked. As soon as you let the State know that you have received the paper, the State will enter the assigned inventory to your office account in OVERS. Until the paper is assigned to your office in OVERS you will not be able to complete an OVERS order with that paper.

The State of Oregon requires that all orders of vital records be processed using **OVERS** and that every issued record be matched to a corresponding piece of intaglio paper. Each piece of intaglio paper has an inventory number, and those numbers are tracked in OVERS. When you issue a certified copy of a vital record it is very important to make sure that the intaglio paper number listed in the OVERS order is the same as the intaglio paper number that was actually given to the customer.

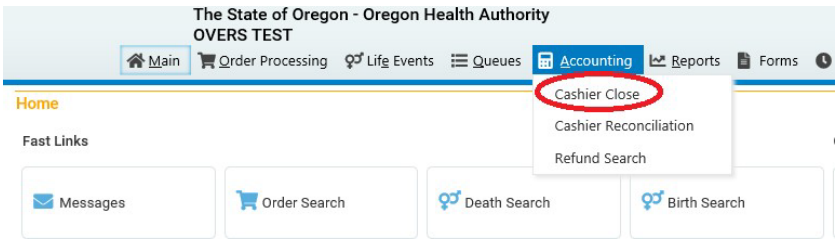
If a piece of intaglio paper is damaged before being issued or during the printing process it must be voided from the State's master inventory. If you must void an order after a certified record has been issued, you must retrieve the original copies from the customer before voiding the order in OVERS. Voided paper is recorded on the Intaglio Paper Excel spreadsheet and emailed to the CHS.VitalRecords@oha.oregon.gov on the 1st and 15th of each month.

After the original copies have been shredded and the order voided in OVERS, a new order can be entered into OVERS and new copies can be issued to the customer. Once an order is voided in OVERS the record and intaglio paper associated with that order is voided and will no longer be considered a legal record.

Cashier Close

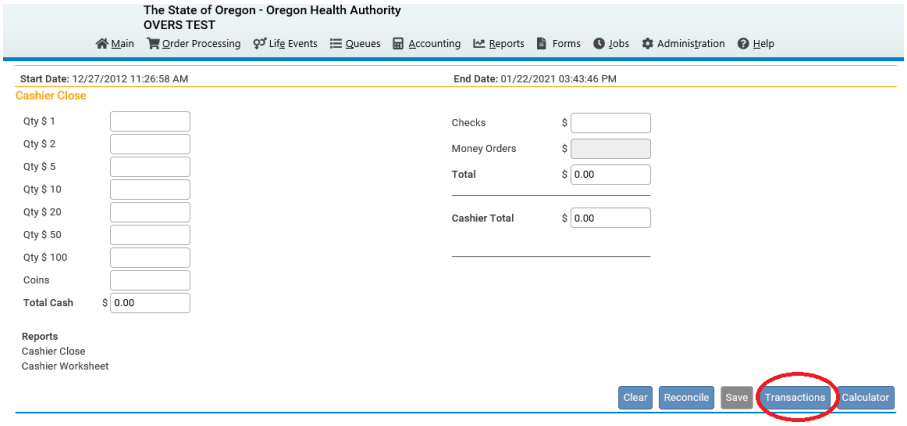
Cashier Close is a reconciliation tool for revenue and payment types for orders. By running Cashier Close on a regular basis, we can use many of the financial reports OVERS provides to review revenue flow, transaction summaries, and overall order processing and revenue intake by each individual staff person who completes orders in OVERS. Running Cashier Close is not required. It is an optional process for those counties that would like to reconcile the fees that they receive or to view transactions for each user.

To run Cashier Close, click on **Accounting** and then click on **Cashier Close**.



Cashier Close Page

Notice the dates on top where there is a Start Date and End Date. This is the range that the system will use to run, with the last date the cashier close was run displaying in the Start Date field. Click on Transactions.

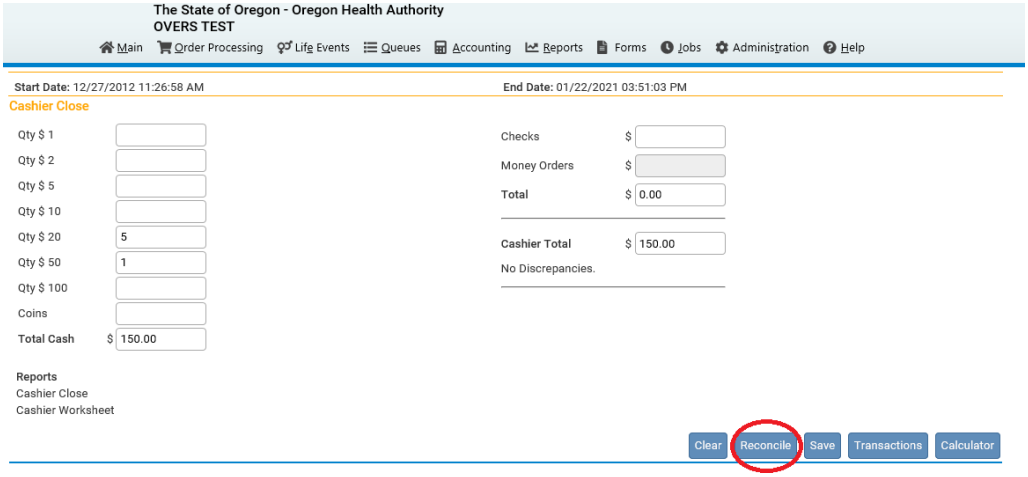


Cashiers Transactions

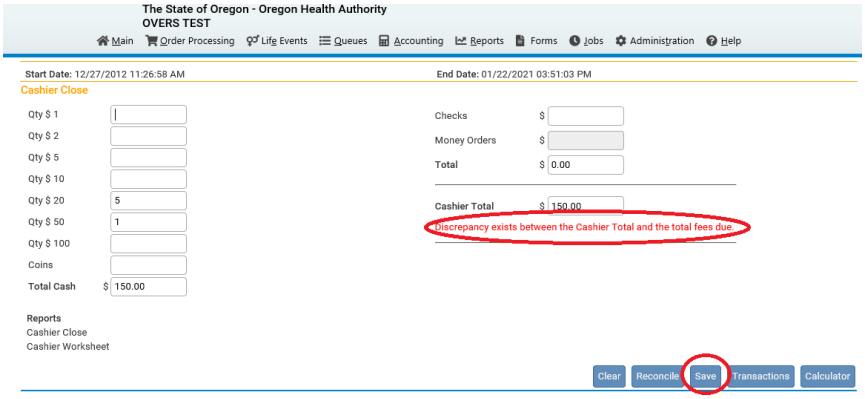
You will see a list of transactions that were run for the time period shown. Note the amount listed in Revenue Total. In this example it is $245.Then click “Return.”

Reconcile

Some counties use the Cashier Close function for their own accounting records. Other county offices have their own separate accounting programs. For counties who do not use cashier close to reconcile the actual money collected at their office, the dollar amount of monies entered is not important. However, when entering the cash amount, you can still match the amount that was listed in Transactions. Click **Reconcile** once the cash amount is entered.



Once reconciled, you might see a message just below the Cashier total that states "discrepancies exist…". This will happen if all checks, money orders and cash were not entered. If you are not using Cashier Close as your accounting system to reconcile customer payments, you can ignore this message. In this case, it was because some of the transactions were paid for by check. Because we aren't using this process for accounting, it's okay to not include any checks, just cash. Click the **Save** button.



The Cashier Close process is now complete.

Amendments

Birth Amendments

A parent may notice an error on a birth record when ordering a birth certificate at the county. If this happens, let the parent know that the way to resolve the error is to email the Center for Health Statistics Amendments Department. They will advise the parents on the best way to proceed to get the error corrected.

The Birth Information Specialist may have made a typo when entering the birth record. Or, the parent may have written something incorrectly on the parent worksheet. In either case, the parent should contact the Amendments Team.

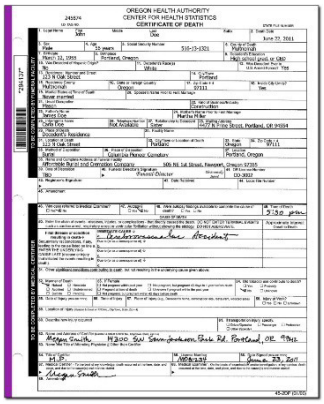
Parents **should not** call the hospital or be given a white copy of the record. Even though the parents state there is an error, counties should print and give the certificate to the parents and advise them to email CHS.Amendments@oha.oregon.gov.

Once the correction has been made, the parents can return the original birth certificate for a replacement. There is no charge for one replacement birth certificate if the original certificate is returned *within one year from date of issue*. **Do not** hold onto certificates while the parents wait for the correction to be made.

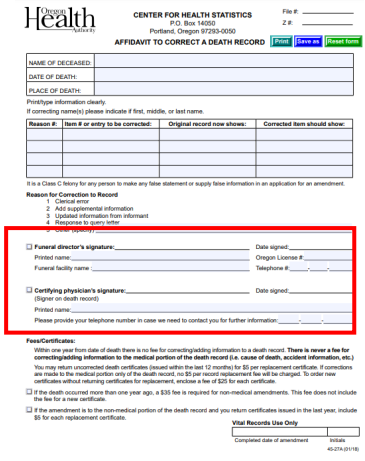
Death Amendments

There are four criteria that must be met before you can amend a death record.

1. You can only make changes to the record while you have the original purple-striped copy. However, do not hold on to these records longer than three days so that you can make changes. The law requires that records be sent to the state within three days.


OREGON HEALTH AUTHORITY
CENTER FOR HEALTH STATISTICS
CERTIFICATE OF DEATH

2. A legally sufficient affidavit is required. Essentially the affidavit must be complete. Pay special attention to make sure that the funeral director, or medical certifier if it is a medical amendment, has signed the affidavit.


Oregon Health Authority
CENTER FOR HEALTH STATISTICS
P.O. Box 14050
Portland, Oregon 97293-0050
AFFIDAVIT TO CORRECT A DEATH RECORD

To be legally sufficient, an affidavit must have:

- The decedent's full legal name as it is listed on the death record.
- The date of death including the month, day and year.
- The place of death including the city and state or the county. Remember this is the place of death and not the type of place (such as a hospital).

- The reason for the amendment in the “Reasons #” column.
- The information in the “Original record now shows” column must be identical to the information on the record.
- The affidavit must be signed and dated. Make sure that the form is signed by a someone that is authorized to do so.
- The Funeral director’s signature and **legibly** printed name.
- The Funeral director’s signature date and license number.

The affidavit must be signed by the correct person.

- For medical or date of death changes, this is the medical certifier who signed the record.
- For non-medical amendments, it must be signed by a licensed funeral director. A funeral director will have a FS or CO at the beginning of their license number.
- If a next-of-kin or informant is attempting to correct the record, please refer them to the state.

3. The change must be allowed. Certain changes are not permitted or are permitted only in certain circumstances. Most items on the death record can be amended but there are some exceptions. For example, signatures can’t ever be amended. The date of death or cause of death cannot be amended by the funeral director, and the decedent’s name can’t be changed by the medical certifier.

   If you are unsure if a change is allowed, contact the CHS Amendments unit at CHF.Amendments@dhsoha.state.or.us.

4. You must have typewriter to be able to type a footnote on the record.

Amending the Death Record

Once you have determined that you have the original record, have a legally sufficient affidavit, the change is allowed, and you have a typewriter, then you are ready to complete the amendment.

The first step is to remove the information being changed with corrective tape or ink. Then type the new information over the whited-out information and add a footnote with a typewriter.

Adding a Footnote

Footnotes are critical for tracking changes to a record and are legally required. See ORS 432.235 (2)(a) for the law concerning amending or correcting a vital record.

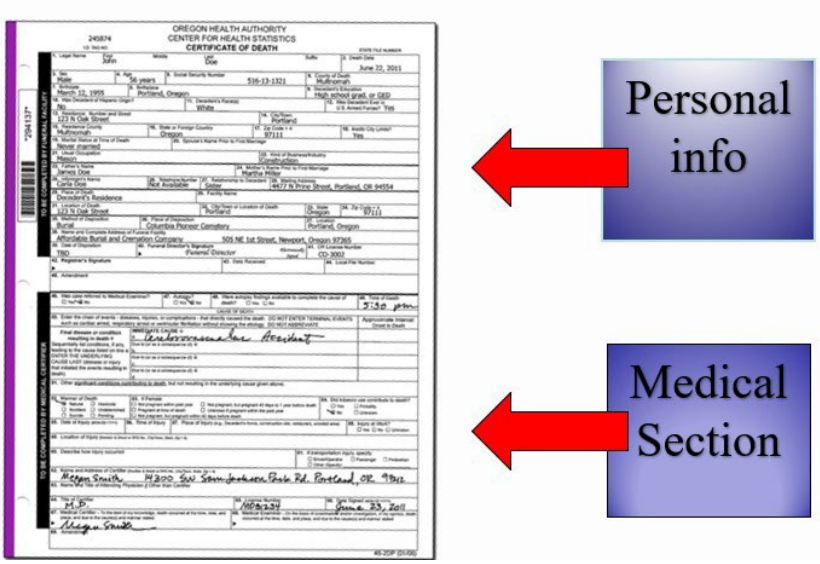
Personal Footnotes

Changes to the personal section or the date of death should be footnoted in box 45, on the top half of the certificate. This way, the footnotes will appear on a short form certificate.

A personal footnote should contain:

- The item being corrected
- Prior information
- Document used to change the record
- Date corrected
- Registrar's or Deputy Registrar's Name and Title
- Initials of the person making the changes

Each of these items is critical for the Center for Health Statistics to account for the source of the information on a certificate. With a properly typed footnote we can see what was changed, what it used to be, what document was used to change the information, when it was changed, by whose authority, and who physically made the change.



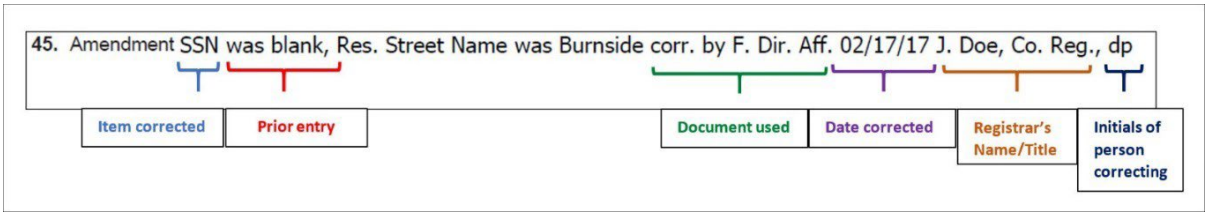
Medical Footnotes

Medical footnotes (other than date of death) are similar to personal footnotes but are typed in box 69 so they only appear on a long form.

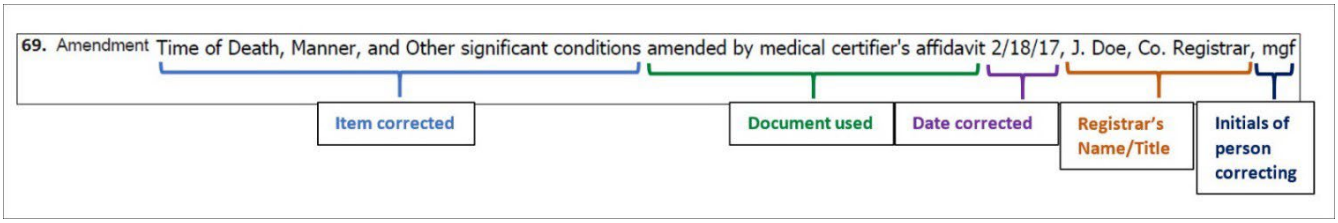
Unlike personal footnotes, medical footnotes do not require any reference to what the prior information was. This is due to the length of medical entries and the limited amount of space for footnotes. Sometimes a medical affidavit may have items being footnoted in both the top and bottom half of the certificate. For example, if Time of Death and Date of Death are both being amended, the Date of death footnote would go in the top half of the record and the time of death would go in the footnotes in the bottom half.

If determining the location of where to type a footnote is confusing just think about the short form and long form certificates. Items have to be footnoted so that they appear, or don't appear, properly.

Below is a personal example of a footnote to the social security number and resident street name. We can see the item that was corrected, what the information previously was, and what document was used to change the information. We can also see when the change was made, under whose authority it was done, and the person who physically made the correction. Because these items appear on the top half of the certificate, they are footnoted in the top half of the record which is box #45.



Next, we have an example of a medical footnote. The main difference here is that this is footnoted in box #69, which is at the bottom of the record. Also, you can see that "prior information" is not listed. If all the previous "Other significant conditions" were listed, you can see how the footnote could get impossibly long.



When typing a footnote, be certain you are being specific enough for someone to tell exactly what was changed without seeing the affidavit. This includes mentioning whose name (mother, father, child, decedent, etc.) was changed, which dates were changed, name of county, etc. In the future when grandchildren, or other government agencies are viewing this record they need to be able to clearly see exactly what was changed and how from the footnote alone. They won't have access to the affidavit to clear up anything that is ambiguous.

For example:

Incorrect Footnote:

"County formerly Multnomah, Middle Name formerly Mary corrected by F. Dir. Aff. 9/15/17 M. Smith, Co. Reg., mk"

This footnote doesn't provide enough information about whose county or middle name is mentioned.

Correct Footnote:

"Residence County formerly Multnomah, Mother's Middle Name formerly Mary corrected by F. Dir. Aff. 9/15/17 M. Smith, Co. Reg., mk"

With footnotes it is important to be aware of length because there is a limited amount of space to type. Abbreviate where necessary but be careful that the footnote remains specific and accurate.

Some common abbreviations/word substitutions for footnotes are:

Residence-Res.
County-Co.
Name-Nm.
Middle-Md.
Corrected-Corr.
Funeral Director Affidavit-F. Dir. Aff.
Registrar-Reg
Formerly-Was

The last step for amending a record is attaching the affidavit to the record and mailing them to the state. The affidavit will be used at the state to change the information in OVERS, your footnote will be typed into OVERS, and the affidavits are filed as evidence for the change. The envelopes to mail to the state can be ordered from the Center for Health statistics.

A Appendix

Oregon Revised Statutes (ORS) for Counties

The Oregon Revised Statutes are cited only for your reference and are not quoted in their entirety nor verbatim. Please see the CHS website for the most current laws. They can be found at https://www.oregonlegislature.gov/bills_laws/ors/ors432.html.

432.010 Center for Health Statistics; standards. (1) There is established in the Oregon Health Authority the Center for Health Statistics, which shall maintain, operate and advance the system of vital statistics throughout this state in cooperation with appropriate units of county government. The Center for Health Statistics shall be responsible for the proper administration of the system of vital statistics and for the preservation and security of its official records.

(2) In order to promote and maintain nationwide uniformity in the system of vital statistics, the forms for reports and records required by this chapter and the rules adopted under this chapter must include, at a minimum, the items recommended by the federal agency responsible for national vital statistics.

(3) Each report, record and other document required by this chapter shall be on a form or in a format prescribed by the State Registrar of the Center for Health Statistics.

(4) All records shall contain the date of registration.

(5) Information required in forms, reports or records authorized by this chapter may be submitted, verified, registered and stored by photographic, electronic or other means as prescribed by the state registrar. [Amended by 1983 c.709 §2; 1993 c.324 §2; 1997 c.783 §2; 2009 c.595 §605; 2013 c.366 §2]

432.035 County registrars. (1) The State Registrar of the Center for Health Statistics shall designate for each county a government employee or, to the extent allowed under state and federal law, an employee of a local public health authority as defined in ORS 431.003, to act as a county registrar. In consultation with the state registrar, each county registrar may designate one or more deputy county registrars. The county registrar shall be sufficiently positioned within the county and have sufficient contact with deputy county registrars to ensure compliance with this chapter and rules adopted under this chapter.

(2) The county and deputy county registrars shall:

(a) Comply with all instructions of the state registrar;

(b) Check upon the compliance of others with the provisions of this chapter and with rules adopted under this chapter; and

(c) Make an immediate report to the state registrar of any violation of this chapter or of a rule adopted under this chapter coming to their notice by observation, upon complaint of a person or otherwise.

(3) The Oregon Health Authority, after taking into consideration county needs, shall adopt rules under which a county registrar may issue certified copies of records of live births or deaths that occur in the county within six months of the date of the live birth or death. [Amended by 1983 c.709 §5; 1985 c.207 §3; 1997 c.783 §5; 2013 c.366 §7; 2015 c.736 §75]

432.133 Mandatory submission and registration of reports of death; persons required to report. (1)(a) A report of death for each death that occurs in this state must be submitted to the county registrar of the county in which the death occurred or to the Center for Health Statistics, or as otherwise directed by the State Registrar of the Center for Health Statistics, within five calendar days after death or the finding of a dead body and before final disposition, and must be registered if it has been completed and submitted in accordance with this section.

(b) If the place of death is unknown, but the dead body is found in this state, the report of death must be completed and submitted in accordance with this section. The place where the body is found must be noted as the place of death except, if in an emergency the decedent is moved by conveyance to another county and is dead on arrival, the death shall be considered to have occurred in the county from where the body was originally moved.

(c) When death occurs in a moving conveyance within or outside the United States and the body is first removed from the conveyance in this state, the death must be registered in this state and the place where the body is first removed shall be deemed the place of death. The report of death may note the actual location of death insofar as it can be determined.

(d) In all other cases, the place where death is pronounced shall be considered the place where death occurred.

(e) If the date of death is unknown, the medical certifier shall determine the date by approximation. If the date cannot be determined by approximation, the date that the body was found shall be entered on the report of death.

(2)(a) The funeral service practitioner or person acting as a funeral service practitioner who first assumes custody of the dead body shall submit the report of death to the county registrar of the county in which the death occurred or to the Center for Health Statistics. In cases where there is no funeral service practitioner or person acting as a funeral service practitioner, the medical examiner shall submit the report of death.

432.158 Disposition of remains; rules. (1) Human remains shall be disposed of in accordance with ORS chapter 97.

(2) The funeral service practitioner or person acting as a funeral service practitioner who first assumes possession of a dead body or fetus shall submit written notice to the county registrar in the county in which death occurred or in which the dead body or fetus was found within 24 hours of taking possession of the dead body or fetus. The notice must be on a form prescribed and furnished by the State Registrar of the Center for Health Statistics.

(7) A person in charge of a place where interment or other disposition of human remains is made shall indicate on the permit authorizing disposition the date of disposition and return the completed permit to the county registrar of the county where death occurred. If there is no such person, the funeral service practitioner or person acting as the funeral service practitioner shall complete the permit and return it to the county registrar of the county where death occurred.

432.440 County registrar sale of certified copies of records of live birth and death; rules. The Oregon Health Authority shall adopt, taking into consideration local service needs and interests, rules to allow a county registrar to sell, within six months of the date of the event occurring in the county, certified copies of records of live birth and death. [Formerly 432.085]