TxEVER

Modified Commercial Off-the-Shelf Product for Vital Events Registration System

Birth Local User Guide

Version1.0

03/30/2018

Revision History

Date	Description	Version of System	Author
3/30/2018	Initial Document	1.0	Laura Cowan

TABLE OF CONTENTS

1 About the TXEVER Birth Application

The Texas Vital Events Registration System (TxEVER) Web-Enabled Electronic Birth Registration System improves timeliness and accuracy of birth registration in Texas.

1.1 Intended Audience

This user guide serves as a comprehensive reference for Local users who participate in the TxEVER Birth module. Local users can register home birth records in addition to performing multiple back office functions.

2 Glossary

Acknowledgment of Paternity: A form completed by both parents of the child to verify the father of the child.

APGAR Score: The acronym for "Appearance, Pulse, Grimace, Activity, and Respiration" score. This score (from 0 to 10) is determined by evaluating the condition of the newborn baby based on the five criteria above.

Attendant: An individual who attends the birth or supervises the attendees of a birth and has legal and professional responsibility for the care of the patient. An attendant can be a certifier as well, but an attendant and certifier can be two different people in some cases.

Birth Worksheet: A form provided to parent(s) who delivered a newborn outside of a facility (such as a home birth). The birth worksheet is completed by the parent(s) and then verified by a facility.

Breech Birth: The kind of birth that occurs when a baby exits the pelvis with the feet or buttocks first instead of the normal head-first presentation.

Cephalic Birth: The kind of birth that occurs when a baby exits the pelvis head-first.

Certifier: The individual who verifies that all of the information on a birth record is correct before releasing and registering the record. A certifier is often the attendant of the birth as well, but a certifier and attendant can be two different people in some cases.

Crosscheck: A function created in logic builder that occurs when certain values are selected or entered during data entry.

De-Certification: when a record is already certified but a birth clerk decides to de-certify the record through the appropriate menu option or by changing the certifier information.

Duplicate/Plural Check: A function that occurs when the application suspects a newly saved birth record has already been saved in the state or is part of a plural delivery where the other similar record shows only a single delivery.

Electronic Certification: The process required by the certifier before the birth record is released and registered.

Hard Edit: when the application fires a crosscheck because of values in two or more fields and requires the birth clerk to edit one or more values before the fields become resolved.

High Risk Record: A record that is flagged during registration because of certain risk factors associated with the birth, such as a high APGAR score, pre-existing health conditions or infections, complications during the birth, and more.

Hospital Verification of Birth Facts: A form completed by the birth clerk when a birth occurred outside of a medical institution, such as a home birth. The form verifies that the information on the Birth Worksheet is correct.

NICU: Neonatal Intensive Care Unit

Pick-List: A drop-down field in the application with pre-determined values that are pulled from a database.

Releasing a Record: The action required after certification to register the birth record in the state of Texas.

Soft Edit: When the application fires a crosscheck because of values in two or more fields (or because a field is left blank) but allows the birth clerk to keep those same values after verifying the values are correct.

SSA: Social Security Administration

SSN: Social Security Number

Type Ahead Combo Box: A system feature that enables the user to begin typing and a pick-list will filter according to what the user types.

Unresolved Fields List: A feature in the application that lists unresolved fields that need to be resolved before certification can occur.

Visual Cueing: A feature of the birth application that provides users with color-coded field cues to indicate the status of each data field.

WIC: Special Supplemental Nutrition Program for Women, Infants and Children. This is a federal assistance program under the USDA's Food and Nutrition Service that provides low-income pregnant women, breastfeeding women, infants, and children under the age of five with healthcare and nutrition services.

3 System Overview

The **TxEVER Birth** module is designed with intuitive interfaces for a seamless user experience. Mouse navigation, keyboard navigation, and Genesis' proprietary tools help streamline workflows.

3.1 Navigation, Data Entry and Tool Tips

The **TxEVER Birth** module is designed with an emphasis on enhancing data entry logistics by providing intuitive interfaces. Mouse navigation, keyboard navigation or a combination of the two are equally accessible methods that, along with several of Genesis' proprietary features, help streamline workflow.

3.1.1 Using the Mouse

Use the mouse to navigate the **TxEVER Birth** module. Click various items (hyperlinked text and/or icons) on the menu to perform functions. The mouse can also be used to navigate from one field to another during data entry.

3.1.2 Using the Keyboard

Use the following keys to navigate through the **Birth** module without using the mouse:

Tab Key: The **Tab** key is a Windows-standard-key that allows users to move from one field to another. When a field is selected, the field will be highlighted with a green background, blue background, and in some cases, a frame will form around the selected field to aid the user.

Shift + Tab: Reverses the tab order and moves focus back to the previous control.

Enter: Initiates the action selected. Pressing **Enter** is equivalent to double-clicking the mouse.

Left/Right/Up/Down Arrows: Used to navigate within a field or within a pick list. The **PgUp** and **PgDn** keys may also be used.

Down Arrow for Dropdown Box: Pressing the **Down Arrow** key in a selected drop-down box will reveal available selections in a list form. Use the **Up** or **Down** arrows to scroll through the list.

Type-ahead Logic: Type-ahead logic provides another way to save time by eliminating the number of keystrokes to pull up an item from a drop-down box. This feature enables the user to begin typing and the list will filter according to what the user types.

Space Bar: Used to toggle a check box item on or off.

3.1.3 Visual Cueing (Viz-e-Q©)

The Visual Cueing feature of the **TxEVER Birth** module uses color-coded field cues to indicate the status of each field. Users at the state level have the ability to change colors according to their own preferences using the **User Parameters Settings** option under **Tools/Utilities/User Parameters**.
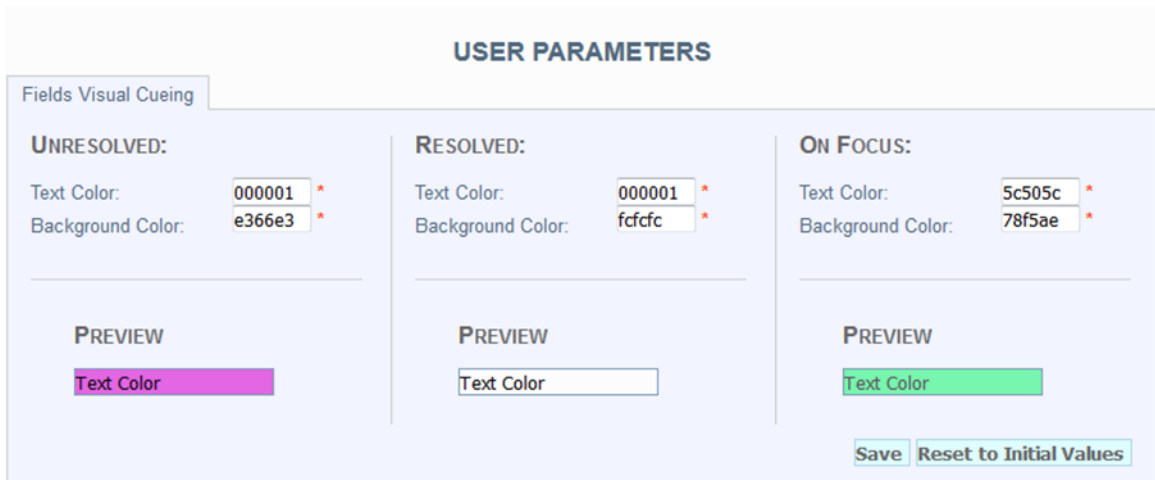
Figure 1: User Parameters Screen

3.1.4   Edit Checks (Fast-Fire©)

Soft Edit

According to the National Center for Health Statistics (NCHS), a soft edit is defined as: "An edit that identifies and queries entries which are outside of the expected range, but which accepts out-of-range entries."

Hard Edit

According to the NCHS, a hard edit is defined as: "An edit that identifies and queries entries which are outside of the expected range which must be corrected before the record can be filed."

An example of a hard edit in the Birth module involves the date of birth. If this date is greater than the system date, the following message will appear:
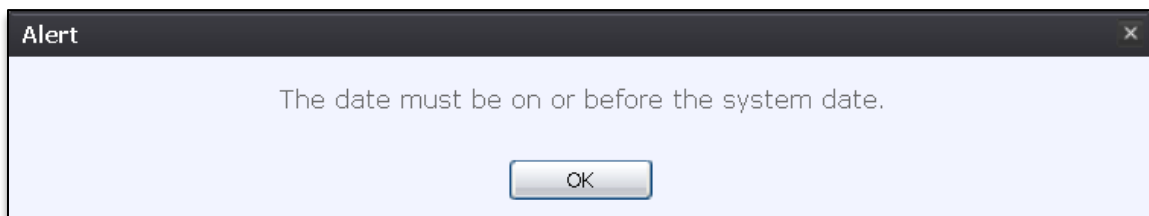

Figure 2: Hard Edit Message

3.1.5   Activity Bar

The **Activity** bar will appear at the bottom of every data entry screen in the **TxEVER Birth** module.
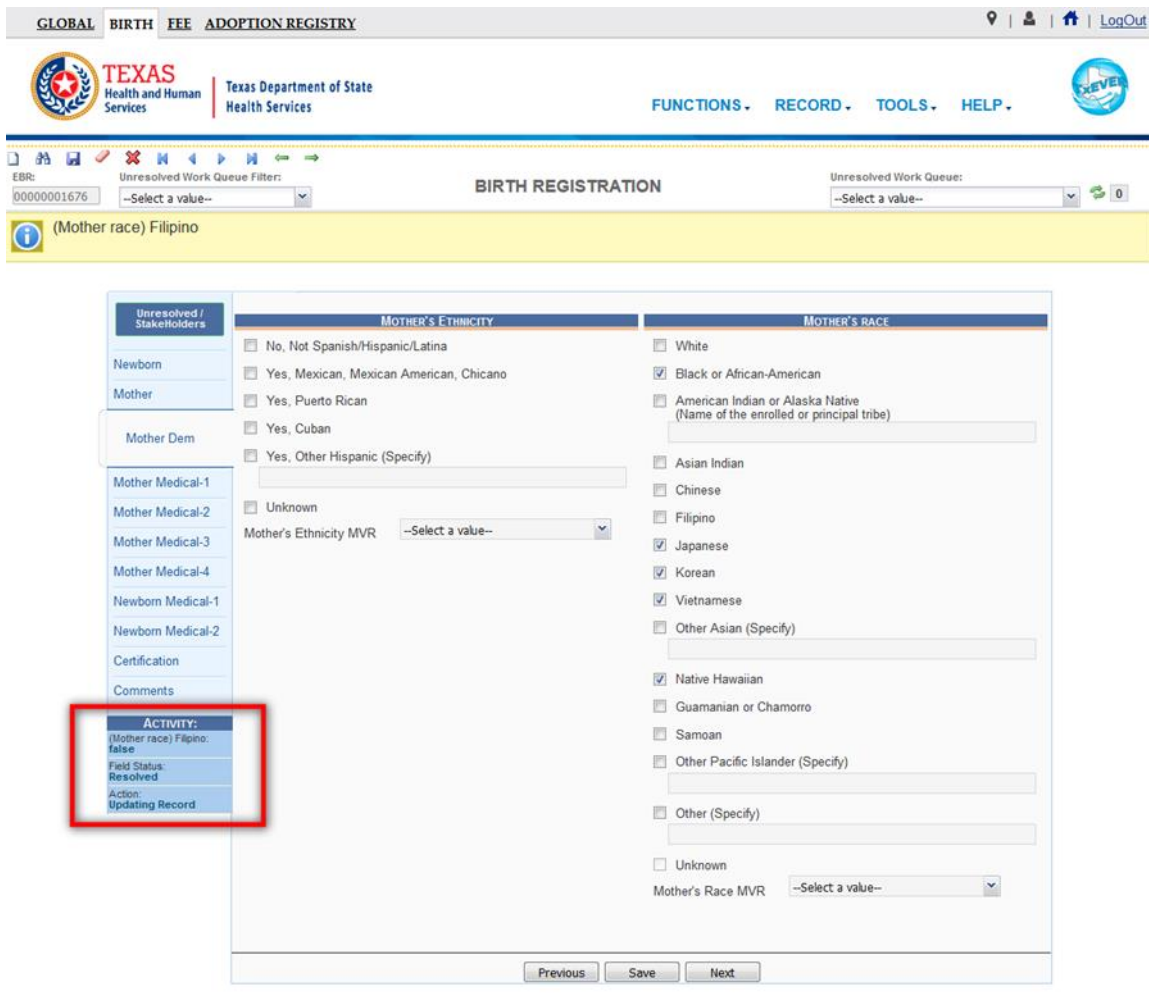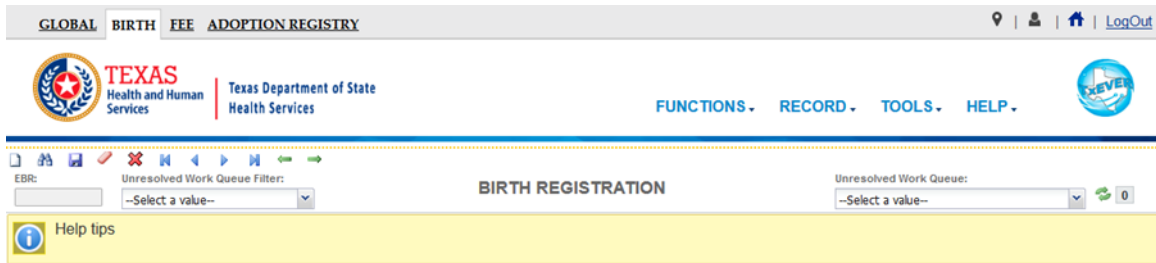
Figure 3: Activity Bar

Information appearing on the **Activity** bar includes:

- **Field Name**: Displays the name of the field currently in focus.
- **Field Status**: Displays the status of the field currently in focus (*Resolved* or *Unresolved*).
- **Current Action**: Displays the action that is currently being performed on the record.

3.1.6   Field-level Help

Field-level Help provides specific help information related to the field selected, which is displayed in the **Field-level Help** frame between the data entry tabs and the data entry screen, as shown below. The content in the **Field-level Help** frame can be configured in **Screen Configuration** by a system administrator.

Figure 4: Field Level Help

3.1.7   System Level Help

System-level Help provides a searchable help index with various help topics pertaining to the functions and processes available within the **TxEVER** system. Go to **Help**/**Help** to access System-level Help.

3.1.8   About TxEVER Birth Application

About TxEVER Birth Application details system information regarding the current version of the **TxEVER Birth** module. To access this option, select the **Help/About** menu item.

3.2   Technical Support Resources

3.2.1   TxEVER Help Desk Technical Support

The **TxEVER Help Desk** is the main source of technical support for users of the **Birth** module.

In order to report an issue to the Help Desk, select **Report TxEVER Issue(s)** on the **TxEVER Front Page** screen as shown below:

Figure 5: TxEVER Splash Page

3.3 Login and System Access

The following technical requirements are needed to access the **TxEVER Birth** module:

- Live Internet connection
- Widely used JavaScript enabled standard web browser (IE8+, Mozilla Firefox, etc.)
- Java runtime
- Adobe Acrobat reader for forms and letters
- MS Excel for accessing/running reports

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

3.3.1   Accessing the TxEVER Birth Module

1. Access the **TxEVER Birth** module on the web:

    a. Open the updated version of the web browser to establish a live internet connection.

    b. Type the application address in the URL box or select from Favorites:
    https://txever.dshs.texas.gov/TxEverUI/Welcome.htm

2. The application splash page will load, as pictured below:

Figure 6: TxEVER Splash Page

3. Click the **Log On to Texas Department of State Health Services** button.
4. The **Terms of Use Screen** will load, as pictured below:
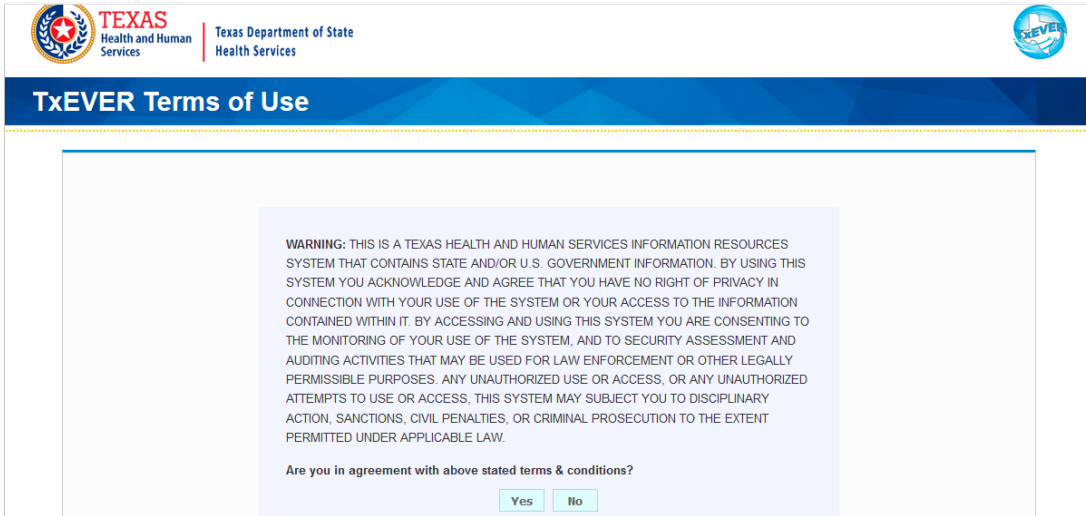
Figure 7: Terms of Use Page

5. Click the **Yes** button to confirm agreement with the terms of use.

   a. Click the **No** button to be returned to the TxEVER splash page.

6. The TxEVER login screen will display:
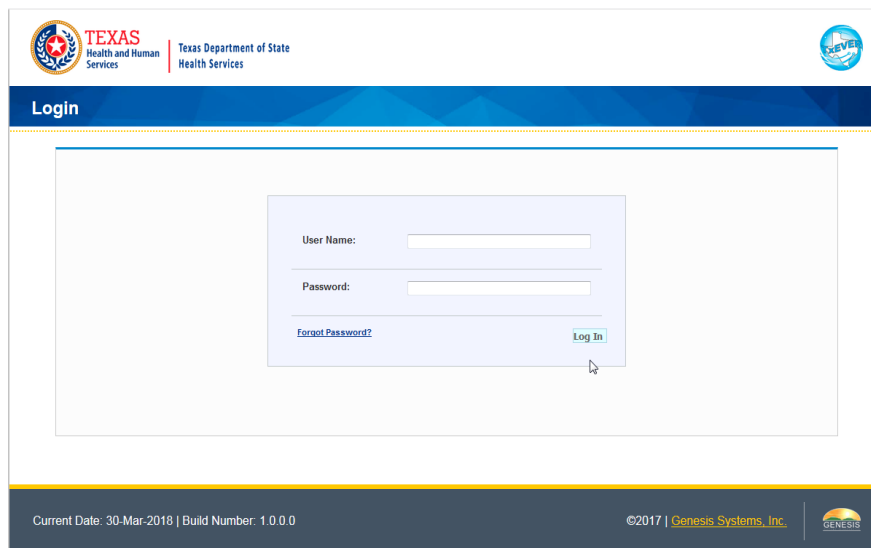
Figure 8: TxEVER Login Page

7. Enter in a user name and password and click the **Log In** button.

8. The Select Location window will be displayed.

Figure 9: Select Location Window

a. Select the appropriate facility from the available choices in the drop-down list.
b. If the user works at multiple physical locations, the drop-down list will contain all physical locations assigned to their user account.

c. Click **OK**. The main page of the **TxEVER** application will be displayed:
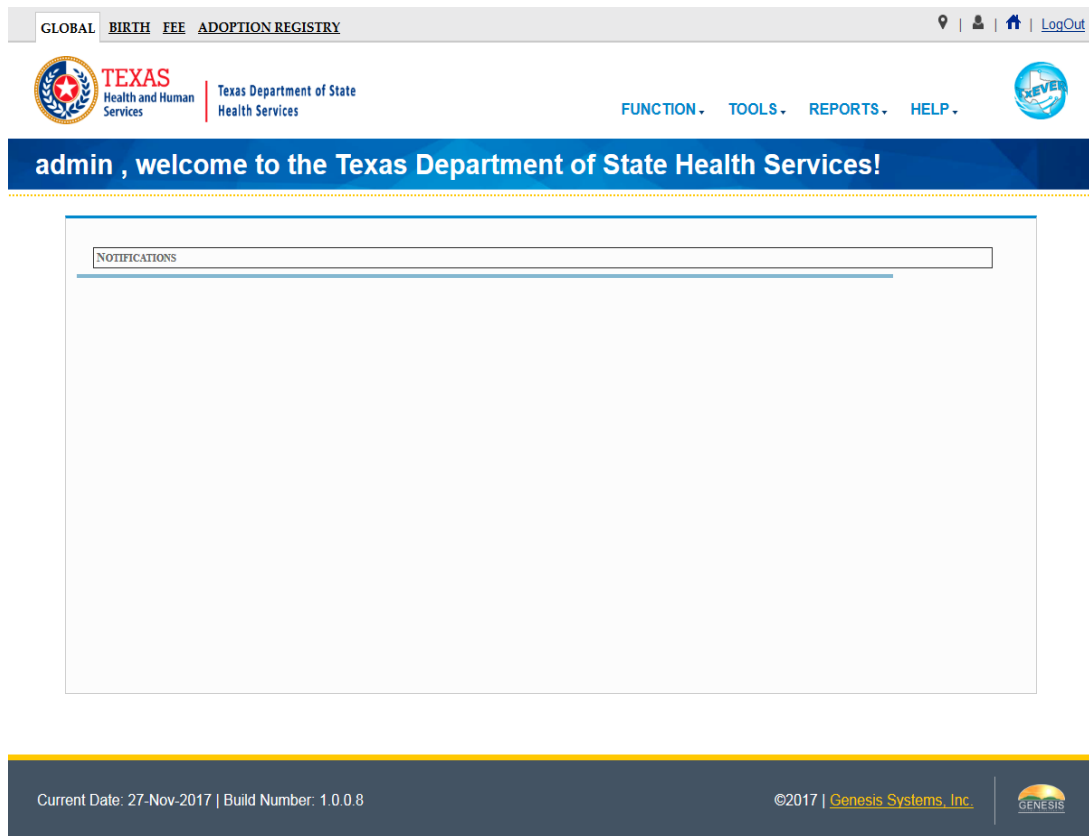
Figure 10: TxEVER Home Page

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

9. Click the **Birth** tab to go to the **Birth Home** screen.

3.3.2   Session Time-Outs

If the system has not detected activity within 20 minutes, the session will time out. Two minutes prior to a session time-out, the system will issue the following warning message:
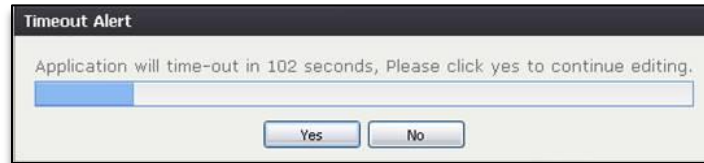
Figure 11: Timeout Warning Message

If the system appears to stop responding (i.e., no choices in some pick-lists, cannot save a record, cannot retrieve a record, etc.), the session has likely timed-out. The following message will appear when a timeout occurs:
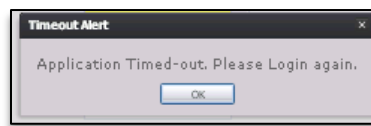
Figure 12: Timeout Message

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

3.3.3   About Passwords

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

Figure 13: Change Password Screen

The new password must initially meet all of the following requirements, although a system administrator may change password requirements at any time:

- Must have at least one numeric character

- Must contain uppercase and lowercase characters

- Must contain at least one special character (i.e. #, $, !, @)

- Must be a minimum of 8 characters long

If the new password does not meet these requirements, the message below will appear:
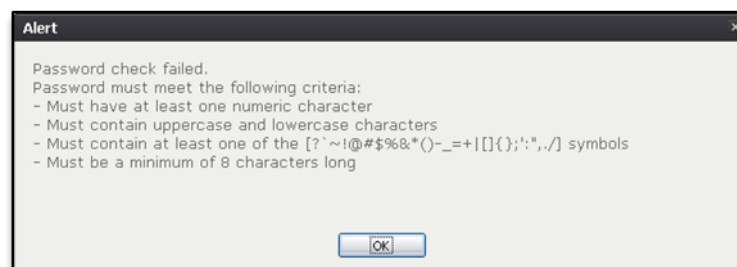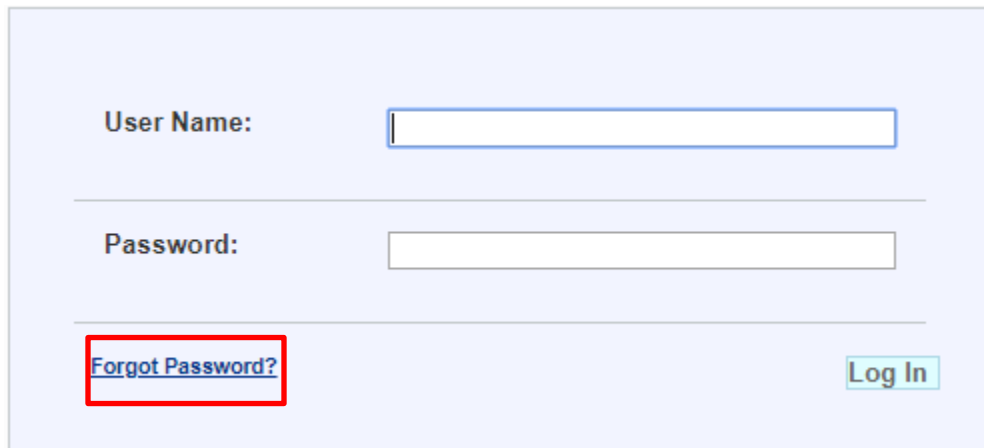
Figure 14: Password Check Failed Message

Passwords expire at intervals determined by system administrators. When a user attempts to log on with an expired password, they will be alerted by the system.
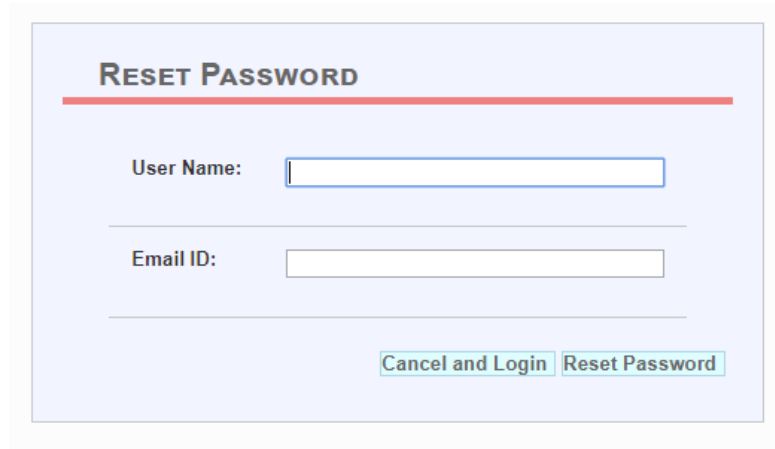
A user may also change a forgotten password at any time by clicking the **Forgot Password** button located on the **Login** screen as shown in step 2 of **Accessing the TxEver Birth Module**.

Figure 15: Forgot Password Link

Clicking on the link will take the user to a **Reset Password** screen where they can reset their password by entering their User Name and Email ID. Users will have the option to cancel the password reset process. Reset passwords will still be required to submit to appropriate password criteria for the system.

Figure 16: Reset Password Screen

3.4 Log Out of the System

Exit or log out of the **TxEVER Birth** module using one of the following methods:

1. From the **Main Menu**, select **Function/Exit System**.

   OR

2. Click **Log Out**.

Note: Clicking the **[X]** in the upper right corner of the browser window will close the system, but it is recommended that you exit by pressing **Logout** or the **Exit System** menu option instead. This will ensure that the session closes in order to prevent possible problems when logging on again.

4 Birth Registration Data Entry

This section provides detailed information about the **TxEVER Birth** module regarding functions related to **Birth Registration Data Entry** that allow local facilities to release records to the State Review work queue.

The Local user can Create and Save a New Record in **Birth Registration Data Entry** for intended or unintended home births.

To update an existing record after the parents complete the worksheet, use one of the Search methods.

4.1 Start and Save a New Record

The **Birth Registration** menu item function allows authorized users to create/initiate a birth record within the **TxEVER Birth** module.

1. Select the **Birth/Function/Birth Registration** menu item to initiate a **New** birth record.

2. The **Initial Load Birth Registration** screen will appear:

Figure 17: Birth Registration Screen-Initial Load

3. Select the record type from the drop-down list and press the **Tab** key to unlock record fields for data entry.

4. Enter all available information about the birth event in the following mandatory fields and then click **Save**.

Field Name	Information Needed
Record Type	Select a record type from the drop-down list
Plurality	Select the number of children delivered
Newborn's Last Name	Enter Text
Newborn's Date of Birth	Enter Date
Time of Birth	Enter Time
Mother's First Name	Enter Text

Field Name	Information Needed
Mother's Last Name	Enter Text
Mother's Date of Birth	Enter Date
Mother's Maiden Name	Enter Text

5. The application will display the message shown below:
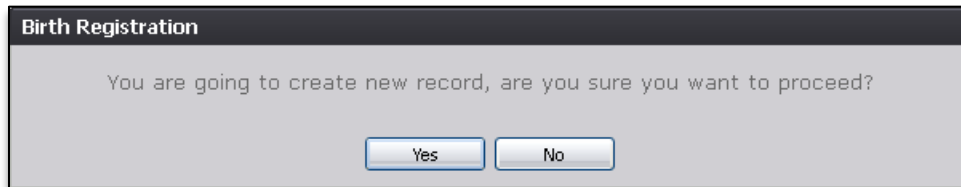
Figure 18: Record Creation Confirmation Message

a. If the user selects **No**, a new record will not be created and saved.

b. If the user selects **Yes**, the system will perform a search for potential duplicate records. A message about duplicate or plural records will only appear if the application suspects a duplicate or plural record.

6. If a match is **not** found, the following message will appear.
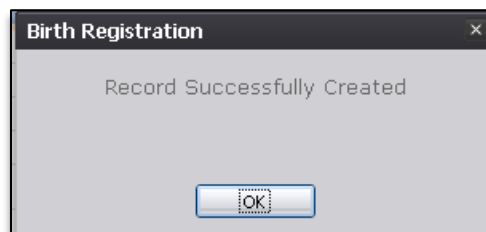
Figure 19: Record Successfully Created Message

7. If a match is found, the following message will appear:
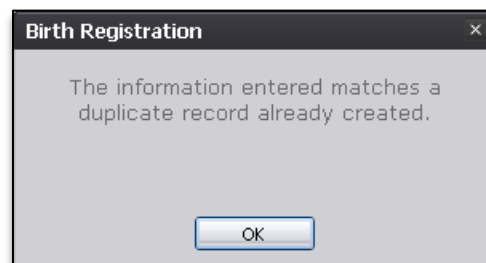
Figure 20: Duplicate Record Message

a. If multiple potential matches are found, the application will display potential duplicate records in the grid.

Figure 21: Duplicate Records Screen

b. When the grid is displayed, one of the following actions can be taken:

   i. Begin checking for actual duplicates by reviewing the information in the grid. To open the record, select it from the grid and then press **Select**. If a user attempts to select a record owned by another Local, a message alerting the user to this will appear.

   ii. Continue with the creation of the new record by selecting **Continue to Save Record**.

   iii. Select **Cancel** to return to the record and make changes to the fields before attempting to save again and re-initiate the duplicate check.

8. Proceed with **Birth Registration** data entry by completing the information requested on the **Birth Registration Data Entry** tabs. See <u>Birth Registration Data Entry Topics</u> and <u>Technical Birth Registration Data Entry Tips</u> for more details on how to complete the record.

4.2 Search for a Record

Searching for a record in the application can be accomplished by using one of the following options:

- Search screen
- Work Queue search

4.2.1 Search Screen

1. Click the **Search** icon 🔍 or select the **Record/Search** menu item.

    The **Search Record** screen will appear.
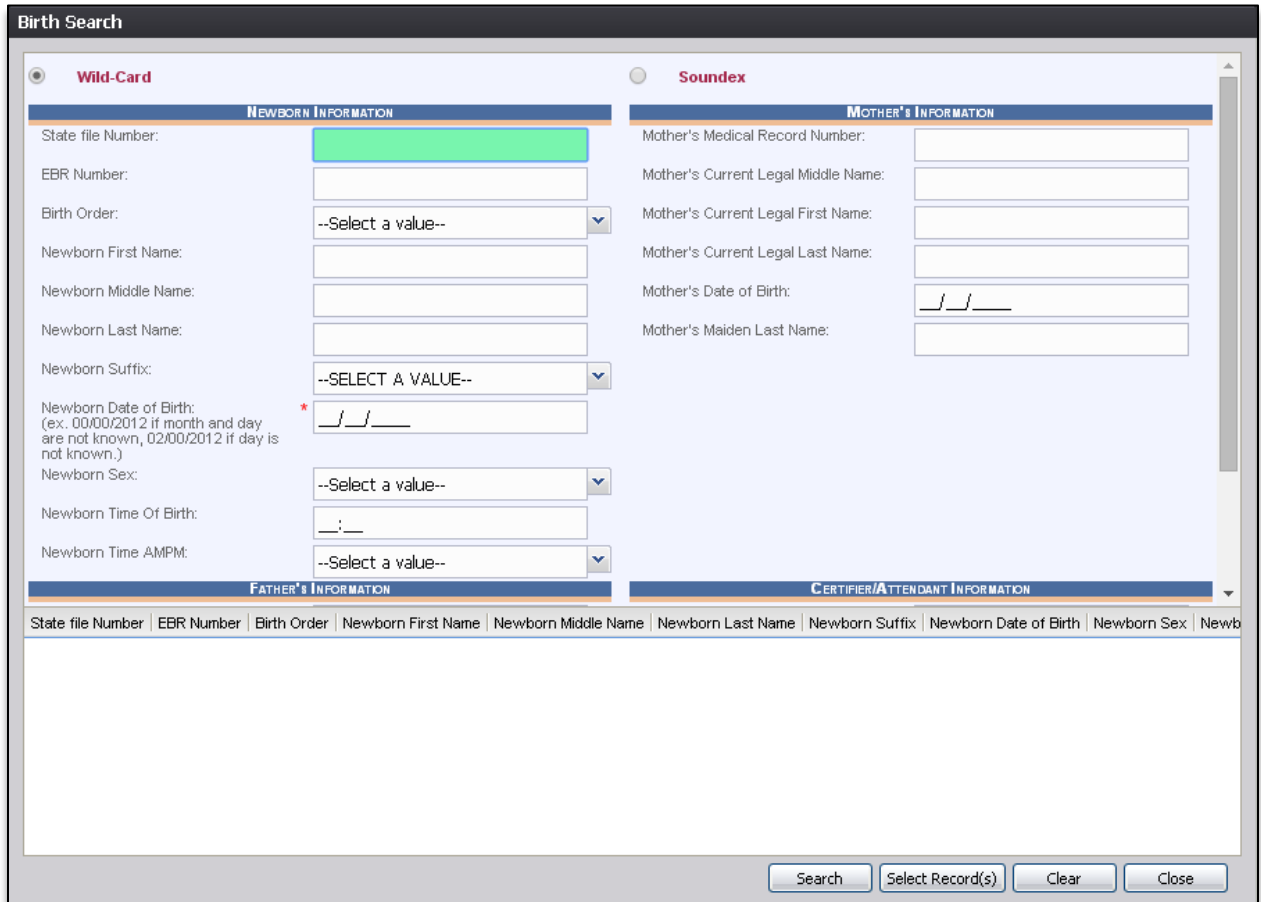
<p align="center">Figure 22: Birth Search Screen</p>

2. Enter all available information regarding the record you are trying to locate.

    ✓ **Tip**: Text fields such as names do not have to be completed. Enter the first several letters instead of the entire text when spelling is in question, but include other items to reduce the number of matches.

    ✓ **Tip**: Along with a name, including the year of birth (which can be entered as a series of 00s followed by a year-i.e. 00/00/2012) and gender and other information you are sure of will reduce the number of matches that are returned and cause faster search results.

    ✓ **Tip**: Choosing Soundex still requires the user to enter at least the newborn's year of birth. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound

familiar as well.

3. Click **Search** to search the database. If no records match the search criteria, the system will display the following message:
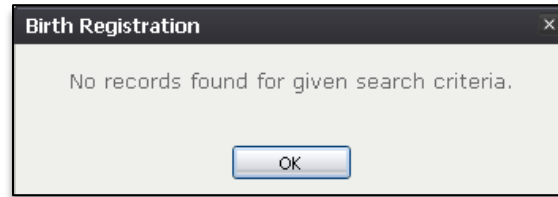
Figure 23: No Records Found Message

4. Records that match the search criteria populate the grid in the lower half of the screen, as shown below:

Figure 24: Birth Search Screen with Results

5. Click on the appropriate record to select it. Select multiple records by holding down the **Ctrl** key and clicking on records.

6. Click **Select Record(s)** to retrieve record(s) to the Work Queue.

7. Select a record from the work queue by clicking on it to retrieve it to the screen.

> The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional review and/or processing.

4.2.2   Work Queue Search

The Work Queue in the **Birth Registration Data Entry** process will contain the following:

- Birth records associated with your login location that still require some type of action or birth records that were released to the State but sent back to the Local after additional information was requested.

- A list in the work queue sorted by the date of birth that will display the newborn's last name, newborn's first name, and newborn's date of birth.

    1. From the drop-down list, set the filter for the appropriate record type. Options include:
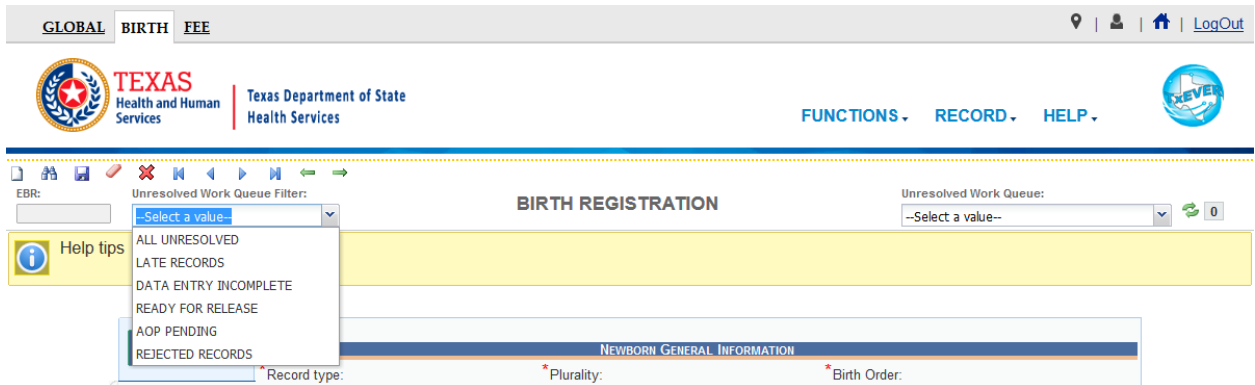
Figure 25: Unresolved Work Queue Filter

- **All Unresolved**: All records that have been started but the worksheets have not been received from the parents to update the record or the necessary forms have not been completed by the parents.

- **Late Records**: All records that have not been certified within 5 days of the date of event.

- **Data Entry Incomplete**: All records with incomplete required information fields.

- **Ready for Release**: All records that are ready to be released for certification.

- **AOP Pending**: All records that are waiting on Acknowledgment of Paternity to be

completed.

- **Rejected Records**: Any records that have been rejected by the state after submission.

2. From the record list, select a record by clicking on it or with the focus on the list, start typing newborn's last name (if available).
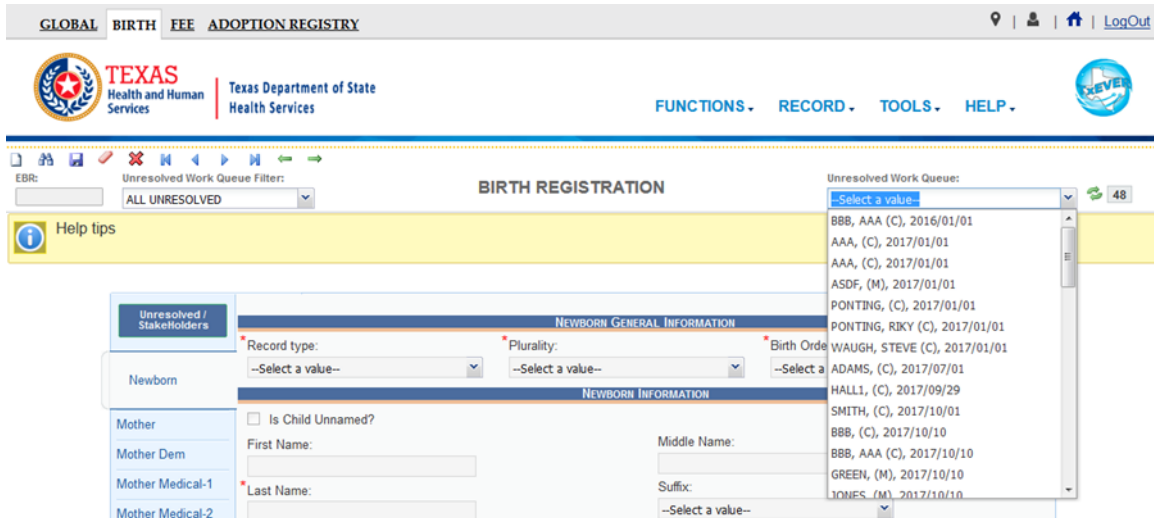
Figure 26: Unresolved Work Queue

3. The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional review and/or processing.

4.3   Canceling Changes

A user may cancel changes made to a record since it was last saved in **Birth Registration Data Entry**.

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Enter information or modify information entered in any of the fields. If a user navigates away from the current record by completing an action such as initiating a record search or accessing a new record, the system will issue the following prompt:
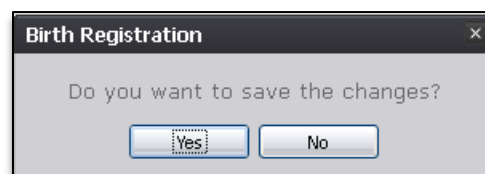
Figure 27: Save Changes Confirmation Message

3. To save the changes on the record, press **Yes**. To cancel the changes made to the record and restore the original values, click **No**.

4.4 Update a Record

To update a record:

- While a record with unsaved changes is on screen, select **Record/Save**. The following message will appear:
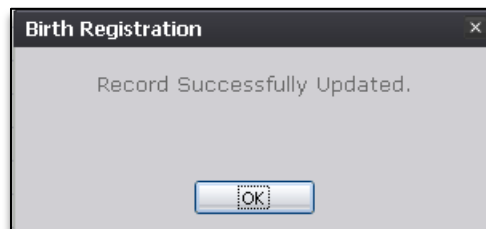
Figure 28: Record Successfully Updated Message

All previously unsaved changes made to the record will be saved.

4.5 Abandoning a Record

Any user can abandon a record up until the record is released and assigned a State File Number (SFN). If a record is released, a State user can void the record through **Legal View**.

To abandon a record:

1. Select the **Record/Abandon** menu item or the **Abandon** icon . The following message will appear:
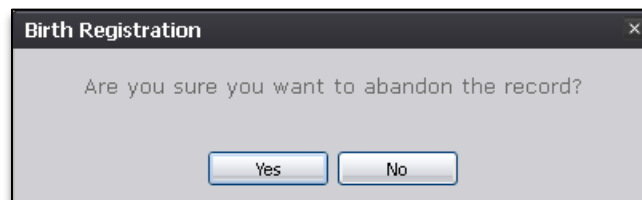
Figure 29: Record Abandon Record Confirmation Message

2. Select **No** to cancel the action and return to the record, or select **Yes** to provide a reason for abandoning the record in the comment box.
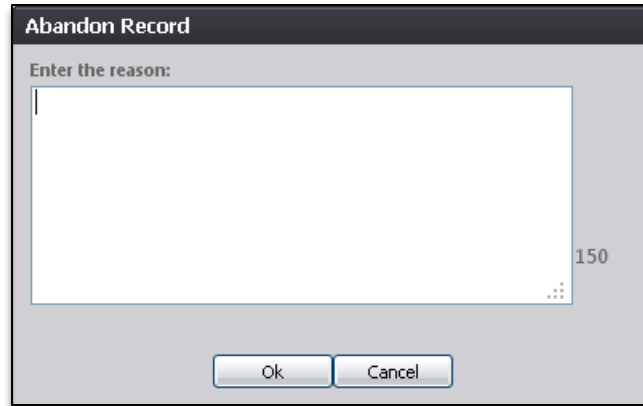
Figure 30: Abandon Record Comment Screen

3. Enter a comment and press **OK**, the record will no longer appear in the Unresolved Work queue and the following message will appear:
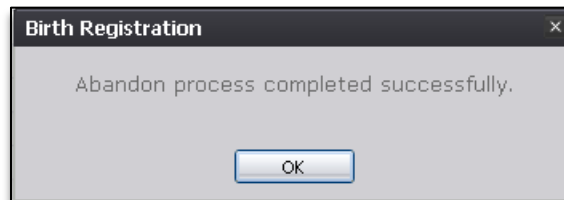
Figure 31: Record Abandoned Successfully Message

4.6   Returning to the Main Menu

Return to the **TxEVER Birth Main Menu** at any time by selecting the **Function/Home** menu item.

4.7   Unresolved Fields List

Depending on the type of record, many actions need to be performed before a record is ready to be released to the State for further processing. To check if all data items are complete, use the **Unresolved Fields** list to identify areas that require some sort of action before the record is resolved. The **Unresolved Fields** list displays individual data fields that need to be completed for a specific record before it can be resolved.

To view the **Unresolved Fields** list:

1. Retrieve a record.

2. On the **Birth Registration** screen, click **Unresolved / StakeHolders** in the top left corner to open the **Unresolved Fields** list.

<p style="text-align:center">Figure 32: Unresolved/Stakeholders Button</p>

3. To go to a particular unresolved field, click the field's link. The system will navigate to that particular field directly so that it may be resolved and the **Unresolved Fields** list will close.

<p style="text-align:center">Figure 33: Unresolved Fields List</p>

4. Click the **Unresolved / StakeHolders** button again to close the list and return to the **Data Entry** screen.

4.8   Birth Registration Data Entry Tips

The objective of this section is to address data entry completion topics so that records may be available for further processing. Most of the data items that need to be completed will only require the **Tab** key to advance to the field, typing the necessary information and then pressing the **Tab** key to advance again. This section attempts to address the remaining scenarios.

4.8.1   Double Data Entry

Certain fields (such as Newborn First Name) within the Birth Registration Data Entry screen will require that the user enter the value into the main data entry screen and then confirm the entered value by entering it again in a separate data entry interface. Fields that require double data entry will present users with the following screen when the user tabs off the field:
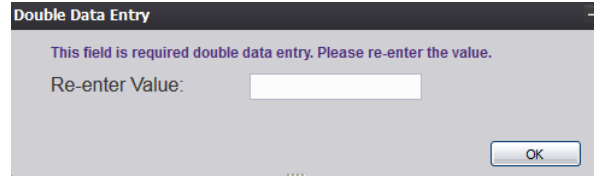
Figure 34: Double Data Entry Screen

Enter the value again and click the **OK** button to close the Double Data Entry screen. If the value entered in the Double Data Entry screen matches the value entered on the main data entry screen, the user will be moved to the next data field. If the values do not match, the following message will appear:
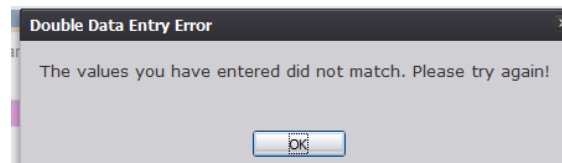
Figure 35: Double Data Entry Error Screen

Click **OK** to close the message and return to the data entry screen. The value entered into the field will be cleared and the double data entry process will be required again.

4.8.2   Pick List Navigation

Mother's Residence fields illustrate the concept of pick-list menus. Refer to examples below to quickly retrieve entries and expedite data entry.

Figure 36: Mother's Residence Fields

1. Set focus on the **State/Country** field by clicking on the field. Type the letters 'TEX' or any other beginning letters of a state.

   ✓ This is the convention for finding a state or other item in a pick-list. Typing 'TEXAS' will also find TEXAS and typing SOUTH C will find SOUTH CAROLINA but will require typing more letters before the desired match is found.

   ✓ Selecting a state will filter results in the **Local** and **City/Town** drop-down lists as well.

   1. With focus still on the **State/Country** field, click the checkbox next to the data entry field to filter results to foreign countries only.

4.8.3 Screen Tab Navigation

When the last field on the **Newborn** tab is resolved the next field that needs a response is on the **Mother** tab.

Pressing **Tab** from the final field on the **Newborn** tab automatically advances the focus to the **Save** button. Press tab one more time to highlight the **Next** button at the bottom of the screen. Once highlighted, the user can press **Enter** to load the Mother tab.

4.8.4 Ethnicity and Race Fields Properties

The **Ethnicity** field allows one selection from the available options. Use the mouse or the **Spacebar** key to select an option.

To change the choice, the selected choice must first be unchecked by clicking on it again and then selecting a different choice.

Figure 37: Ethnicity and Race Fields

Race fields allow multiple choices. Click as many choices as needed.

4.9 Record Comments

Certain events that take place require that a comment be entered. These comments are stored and can be viewed in a grid on the **Comments** tab of the data entry screens:

The following information regarding each comment will be stored:

- Action that required the comment
- User logged in when the comment was entered
- Date and time the comment was entered
- Text of the comment

Comments may be entered or viewed by clicking on the **Comments** tab in **Birth Registration Data Entry**.

4.10 Technical Birth Registration Data Entry Tips
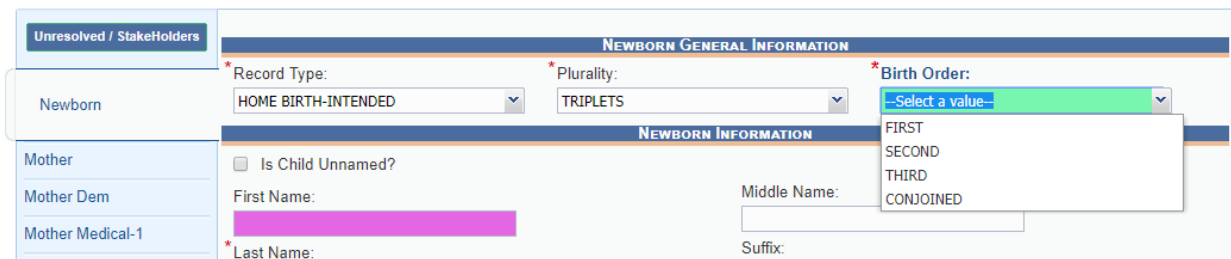
The objective of this section is to familiarize the Local user with technical birth registration data entry procedures after they have received a completed worksheet from the parents. For example, certain fields will become enabled or disabled throughout the record depending on specific values selected by the Local user. Homebirth records will follow a relaxed rule set at a Local location.

4.10.1 Newborn Tab

4.10.1.1 Plurality

Selecting a **Plurality** value of anything other than **Single** will cause the **Birth Order** field to become enabled.

For example, selecting **Triplets** in the **Plurality** field will cause the **Birth Order** field to show options for **First Born**, **Second Born**, **Third Born**, and **Conjoined**. The **Birth Order** field will only show values up to the selected plurality value.

Figure 38: Plurality and Birth Order Fields
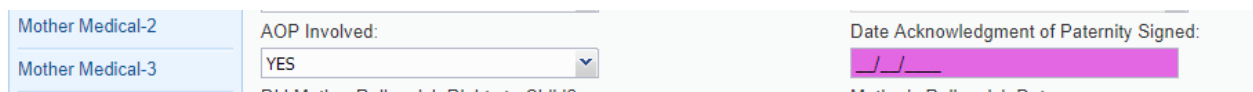
4.10.1.2 Time of Birth

All births entered into the **TxEVER Birth** module must be entered in military time. This field must be resolved before the record can be saved for the first time.

4.10.2 Mother Tab

4.10.2.1 Date AOP Signed

The **Date AOP Signed** field will only become enabled if 'Yes' is selected in the **AOP Involved** field.

Figure 39: Date AOP Signed Field

4.10.3 Mother Medical-1 Tab

4.10.3.1 General

If the user indicates the mother was transferred for delivery, the **If yes, where from** field will become enabled. Select the facility the mother was transferred from the drop-down list or click the **Search** icon beside the field to search for a specific facility.

4.10.3.2 Cigarettes Information

If the user selects **Yes** in the **Did Mother Smoke Cigarettes before or during Pregnancy?** drop-down field in the **Cigarettes Information** section, the fields concerning whether or not the mother reported cigarette intake in number of packs or number of cigarettes will become enabled. Checking the box next to **Did Mother Report in Packs?** field will enable the user to record the number of packs smoked from three months prior to pregnancy up to the third trimester.

Figure 40: Cigarettes Information Section

Checking the box next to **Did Mother Report in Cigarettes?** field will enable the user to record the number of cigarettes smoked from three months prior to pregnancy up to the third trimester.

4.10.4 Mother Medical-2 Tab

4.10.4.1 Pregnancy History

If the local user enters the number 0 in the **Number of Previous Live Births Now Living (Do Not Include This child)** field, the only fields that will remain enabled are the **Number of Previous Live Births Now Dead** and **Number of Other Pregnancy Outcomes** fields. If you indicate this is *not* the mother's first live birth, the aforementioned will remain available, along with the following:

- Date of Last Live Birth

Figure 41: Pregnancy History Section

4.10.4.2 Prenatal Information

If you indicate the mother received prenatal care in this section, the remaining fields will become enabled except for the **First Visit Date MVR** and **Total Number of Prenatal Visits MVR** field. If the mother did not receive prenatal care, all fields will remain disabled.

Figure 42: Prenatal Information Section

4.10.4.3 Method of Delivery

The following fields are mandatory to resolve:

- Was Delivery with Forceps Attempted but Unsuccessful?
- Was Delivery with Vacuum Extraction Attempted but Unsuccessful?
- Fetal Presentation at Birth?
- Final Route & Method of Delivery?

If the user selects **Cesarean** in the **Final Route & Method of Delivery** field, the **If Cesarean, was a Trial of Labor Attempted?** field will become enabled.

Figure 43: Method of Delivery Section

4.10.5 Mother Medical-3 Tab

At least one box needs to be checked in the **Exposure/Infections Present/Treated During Pregnancy** and **Risk Factor** sub-tabs. Checking the **None of the above** or **Unknown** box in each section will resolve the section. If a check box enables an adjacent text box or sub-check box, the user will need to provide a value in the text box and/or mark the appropriate sub-check box before the section becomes resolved.

4.10.6 Mother Medical-4 Tab

At least one box needs to be checked in the **Obstetric Procedures, Onset of Labor, Characteristics of Labor & Delivery,** and **Maternal Morbidity** sub-tabs. Checking the **None of the above** or **Unknown** box in each section will resolve the section. If a check box enables a sub-check box, the user will need to mark the appropriate sub-check box before the section becomes resolved.

4.10.7 Newborn Medical-1 Tab

4.10.7.1 General Information

4.10.7.1.1 APGAR Score
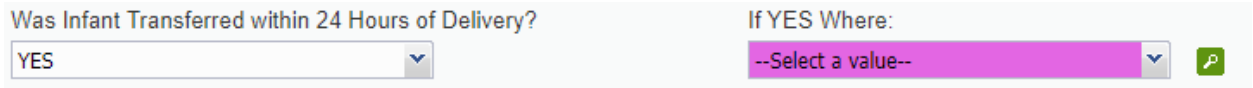
If the newborn has an APGAR score of 5 or below at 5 minutes after delivery or the APGAR score was not taken, the **Apgar Score (at 10 min.)** field will become enabled to record the newborn's APGAR score at 10 minutes.

Figure 44: APGAR Score Fields

4.10.7.1.2 Transferred Infant

If you indicate the infant was transferred within 24 hours of delivery, the **If yes, where** field will become enabled. Click the **Search** icon beside the field to begin searching for a specific facility and the drop down list will populate.

Figure 45: Infant Transfer Fields

4.10.8 Newborn Medical-2 Tab

At least one box needs to be checked in the **Abnormal Conditions** and **Congenital Anomalies** sub-tabs. Checking the **None of the above** or **Unknown** box in each section will resolve the section. If a check box enables an adjacent text box or sub-check box, the user will need to provide a value in the text box and/or mark the appropriate sub-check box before the section becomes resolved.

4.10.9 Certification Tab

There is an option of 'Other' that can be selected from the Certifier drop-down menu so that information for a certifier not found in TxEVER Certifier/Attendant Library Maintenance can be named on a record.

4.11 Capturing Signatures

4.11.1 Capture Acknowledgment of Paternity Signatures

The application provides facility users the ability to capture Acknowledgment of Paternity signatures using one of three available methods:

4.11.1.1 Capture AOP Signatures Using Mouse

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Acknowledgment of Paternity (AOP)** menu and select either the Mother Signature menu item or Father Signature item.

3. The following message will appear:

Birth Registration

We further declare under penalty of perjury that:
- We have been given written and oral notice of: the benefits of having paternity established; the availability of paternity establishment and child support services; and the legal consequences of, the rights and responsibilities of, and the alternative to signing this Acknowledgment.
- No other Acknowledgement of Paternity form naming another man as the biological father of this child has been filed.
- There is no court order naming another man as the biological father of this child.
- A genetic test has not determined that another man is the biological father of this child.

Yes   No

Figure 46: AOP Certification Message

4. Click the **Yes** button to open the desired AOP Signature screen.

   a. Click **No** to close the message and return to the Birth Registration screen.

5. The AOP Signature screen will appear:

Figure 47: AOP Signature Screen-Mouse Pad Tab

6. Create a signature by holding down the left mouse button and moving the mouse on the screen in the signature box.

7. Click the Save Signature button.

8. The system will display the following message:

Figure 48: Signature Saved Successfully Message

4.11.1.2 Capture AOP Signatures Using USB Signature Pad

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Acknowledgment of Paternity (AOP)** menu and select either the Mother Signature menu item or Father Signature item.

3. The following message will appear:

Birth Registration

We further declare under penalty of perjury that:
- We have been given written and oral notice of: the benefits of having paternity established; the availability of paternity establishment and child support services; and the legal consequences of, the rights and responsibilities of, and the alternative to signing this Acknowledgment.
- No other Acknowledgement of Paternity form naming another man as the biological father of this child has been filed.
- There is no court order naming another man as the biological father of this child.
- A genetic test has not determined that another man is the biological father of this child.

Yes   No

Figure 49: AOP Certification Message

4. Click the **Yes** button to open the desired AOP Signature screen.

   a. Click **No** to close the message and return to the Birth Registration screen.

5. The AOP Signature screen will appear. Click the USB Pad tab on the AOP Signature screen:

Figure 50: AOP Signature Screen-USB Pad Tab

6. Create a signature by capturing a signature on a signature pad attached to the computer via USB connection.

7. Click the Save Signature button.

8. The system will display the following message:

Figure 51: Signature Saved Successfully Message

4.11.1.3 Capture AOP Signatures Using Form Upload

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Acknowledgment of Paternity (AOP)** menu and select either the Mother Signature menu item or Father Signature item.

3. The following message will appear:

Birth Registration

We further declare under penalty of perjury that:
- We have been given written and oral notice of: the benefits of having paternity established; the availability of paternity establishment and child support services; and the legal consequences of, the rights and responsibilities of, and the alternative to signing this Acknowledgment.
- No other Acknowledgement of Paternity form naming another man as the biological father of this child has been filed.
- There is no court order naming another man as the biological father of this child.
- A genetic test has not determined that another man is the biological father of this child.

[Yes] [No]

Figure 52: AOP Certification Message

4. Click the **Yes** button to open the desired AOP Signature screen.

   a. Click **No** to close the message and return to the Birth Registration screen.

5. The AOP Signature screen will appear. Click the Upload tab on the AOP Signature screen:

Figure 53: AOP Signature Screen-Upload Tab

6. Select the checkboxes corresponding to the signatures captured on the scan of the paper copy AOP form to be uploaded into TxEVER.

7. Click the Browse button to open the File Upload screen, locate the scanned AOP form and click the Open button.

8. Click the Upload Signature button.

9. The system will display the following message:
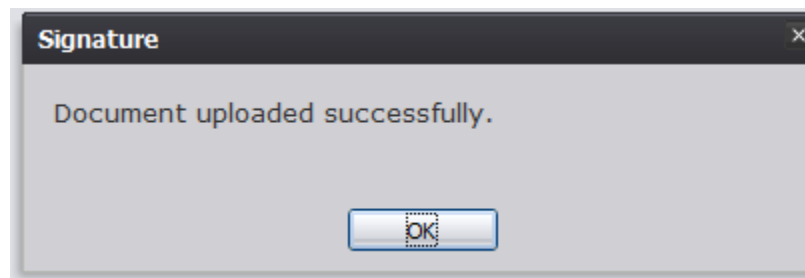
Figure 54: Document Uploaded Successfully Message

4.11.2 Capture Denial of Paternity Signatures

The application provides facility users the ability to capture Denial of Paternity signatures using one of three available methods:

4.11.2.1 Capture DOP Signatures Using Mouse

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Denial of Paternity** menu and select either the Mother Signature menu item or Presumed Father Signature item.

3. A message similar to the following will appear:

Birth Registration

We declare under penalty of perjury that ZACK M RYDER I, the presumed father of the child, is not the biological father. We understand that filing of this denial with an acknowledgment removes the presumed father's legal duty to support the child and terminates his right of custody or visitation with the child.
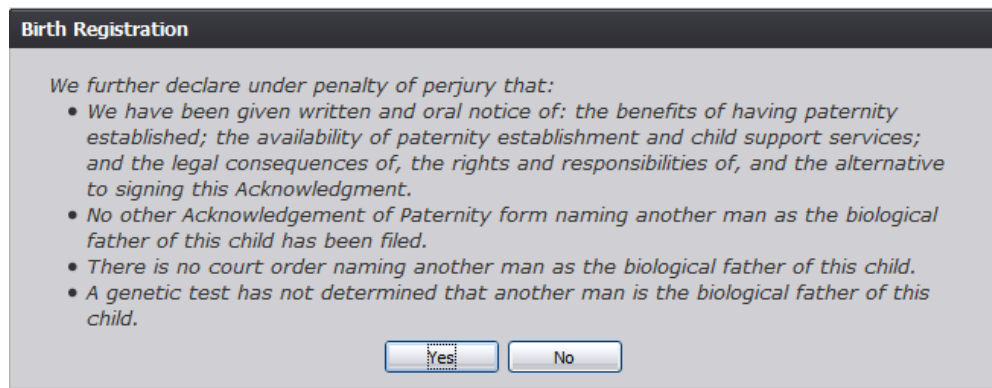
Yes   No
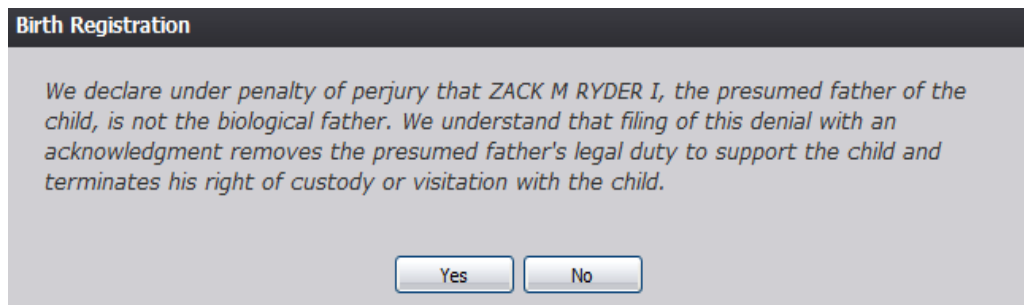
Figure 55: DOP Certification Message

4. Click the **Yes** button to open the desired DOP Signature screen.

   a. Click **No** to close the message and return to the Birth Registration screen.
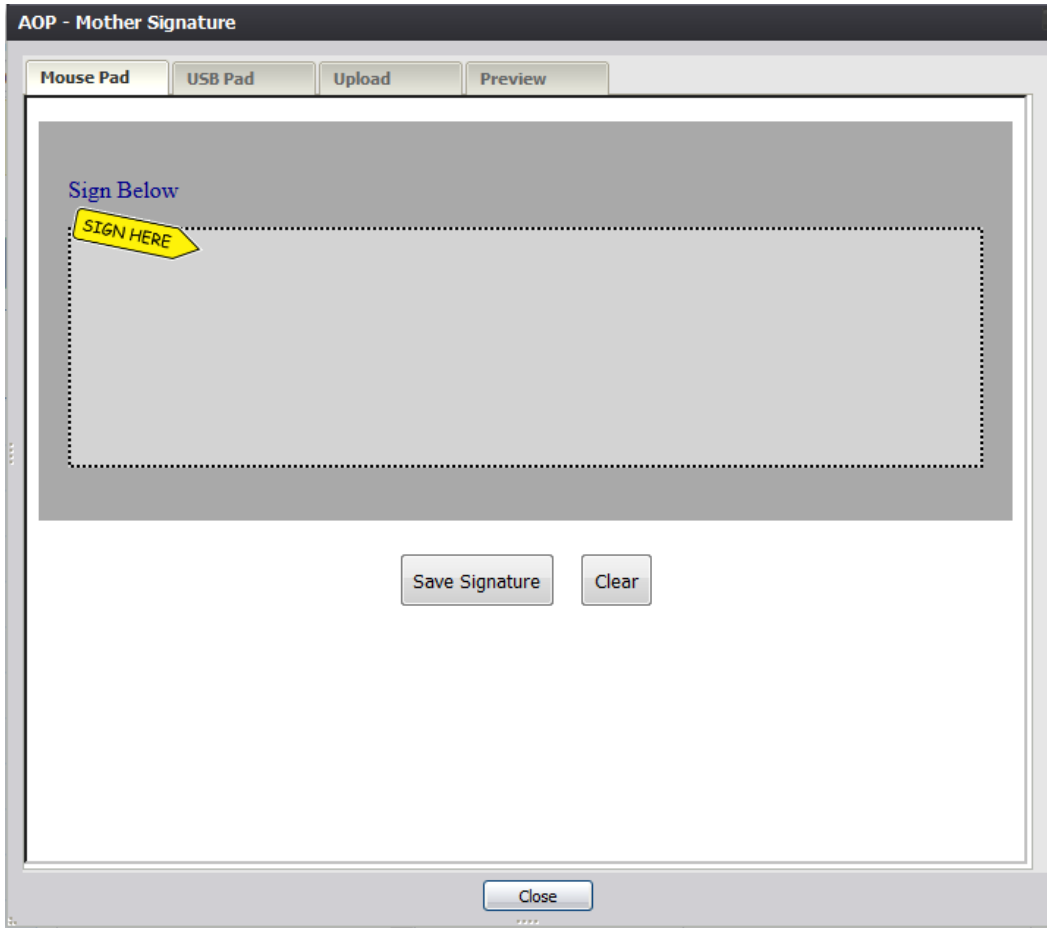
5. The DOP Signature screen will appear:

Figure 56: DOP Signature Screen-Mouse Pad Tab

6. Create a signature by holding down the left mouse button and moving the mouse on the screen in the signature box.

7. Click the Save Signature button.

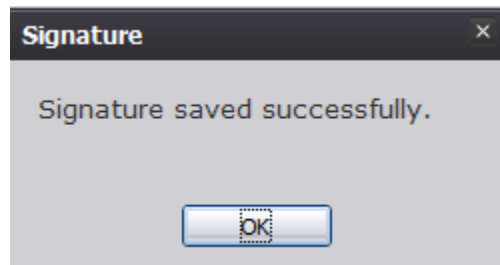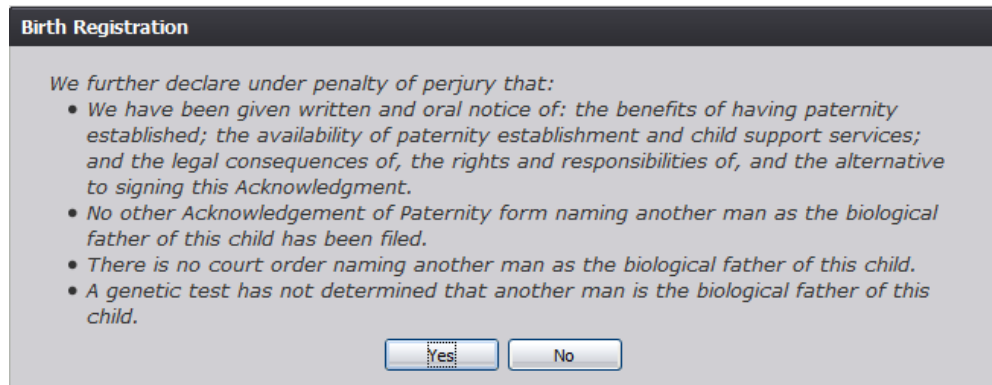8. The system will display the following message:

Figure 57: Signature Saved Successfully Message

4.11.2.2 Capture DOP Signatures Using USB Signature Pad

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Denial of Paternity** menu and select either the Mother Signature menu item or Presumed Father Signature item.

3. The following message will appear:

Birth Registration

We declare under penalty of perjury that ZACK M RYDER I, the presumed father of the child, is not the biological father. We understand that filing of this denial with an acknowledgment removes the presumed father's legal duty to support the child and terminates his right of custody or visitation with the child.

Yes   No
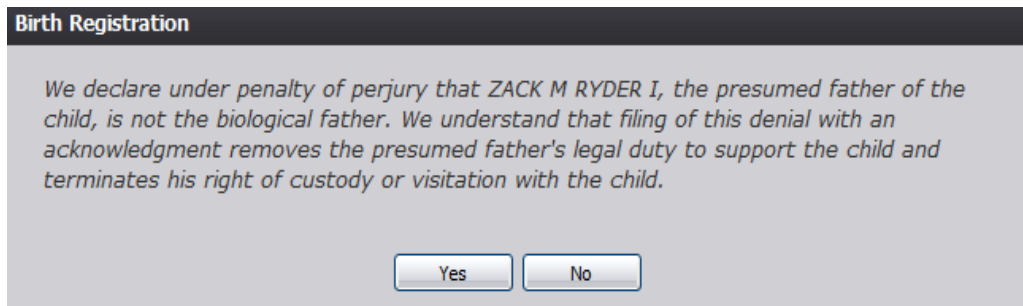
Figure 58: DOP Certification Message

4. Click the **Yes** button to open the desired DOP Signature screen.

   a. Click **No** to close the message and return to the Birth Registration screen.

5. The DOP Signature screen will appear. Click the USB Pad tab on the DOP Signature screen:
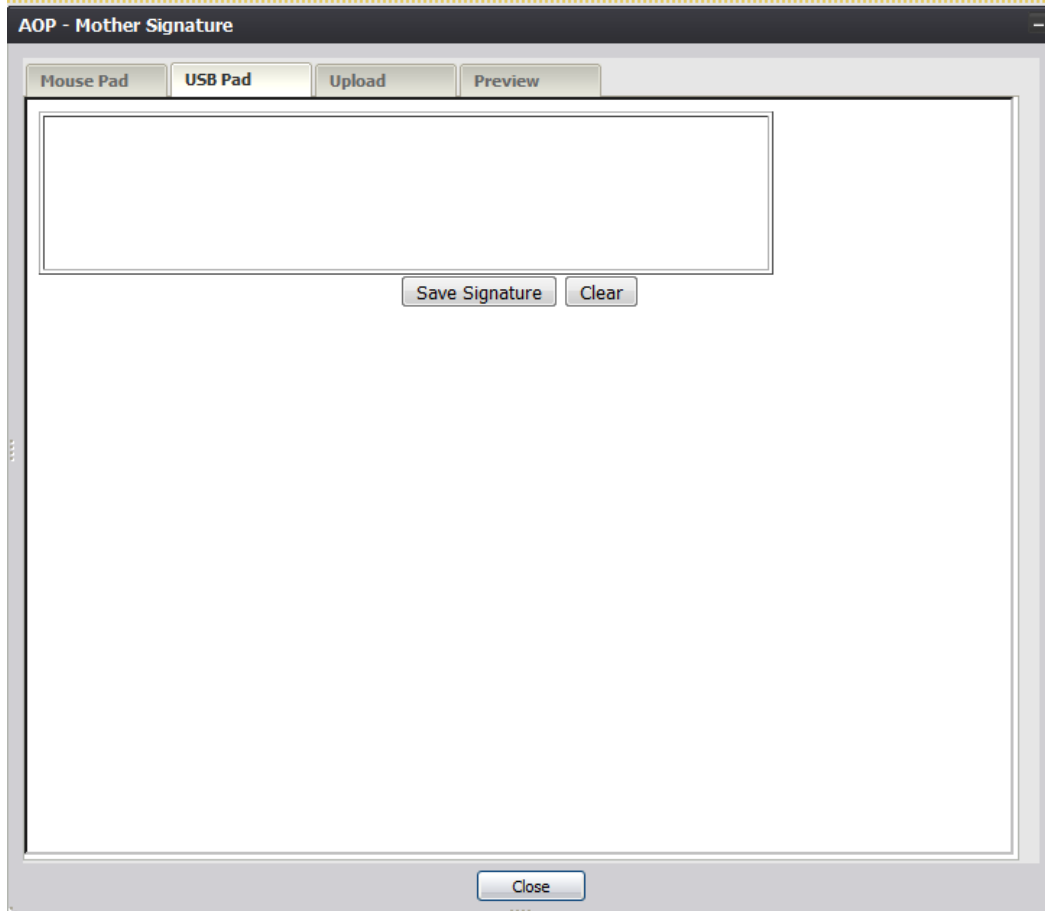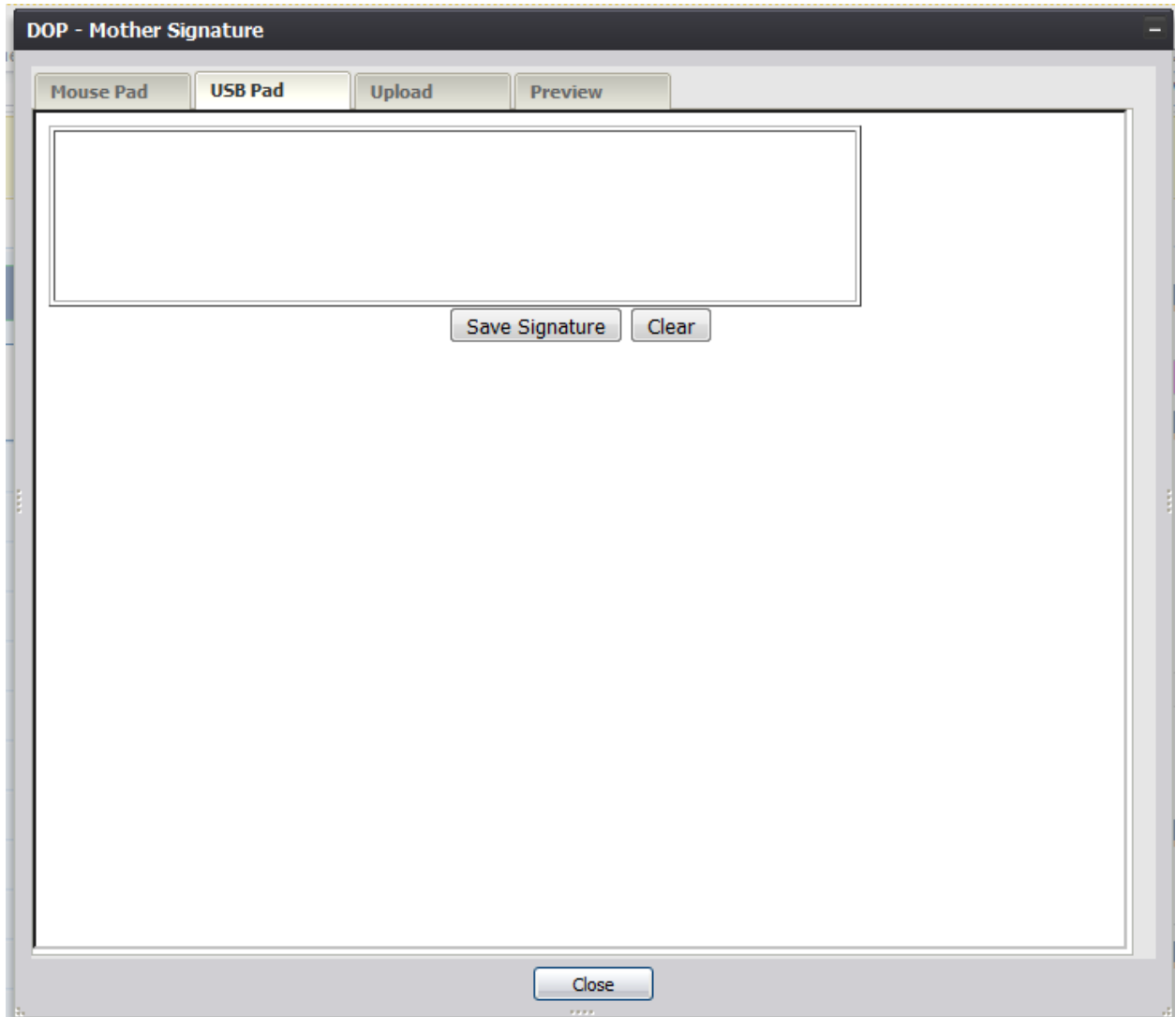
Figure 59: DOP Signature Screen-USB Pad Tab

6. Create a signature by capturing a signature on a signature pad attached to the computer via USB connection.

7. Click the Save Signature button.

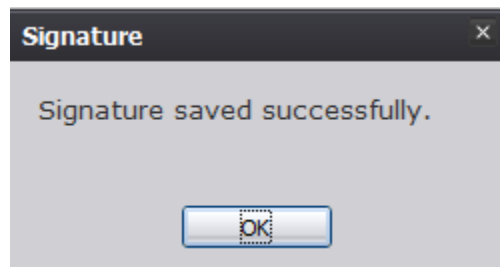8. The system will display the following message:

Figure 60: Signature Saved Successfully Message

4.11.2.3 Capture DOP Signatures Using Form Upload

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Denial of Paternity** menu and select either the Mother Signature menu item or Presumed Father Signature item.
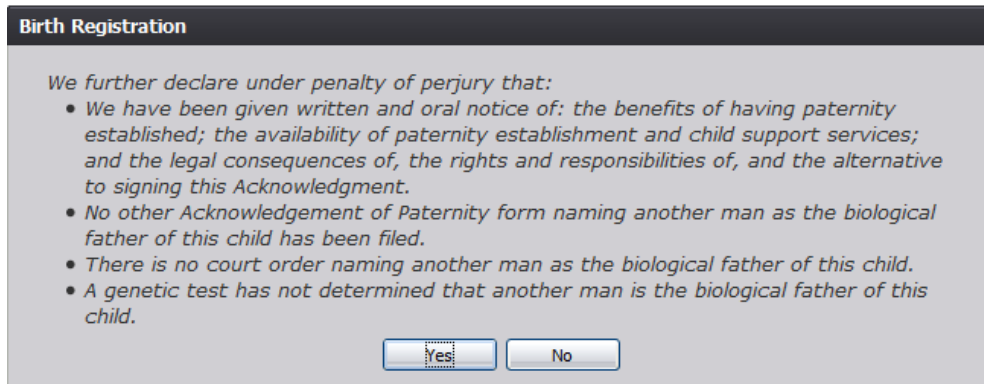
3. The following message will appear:
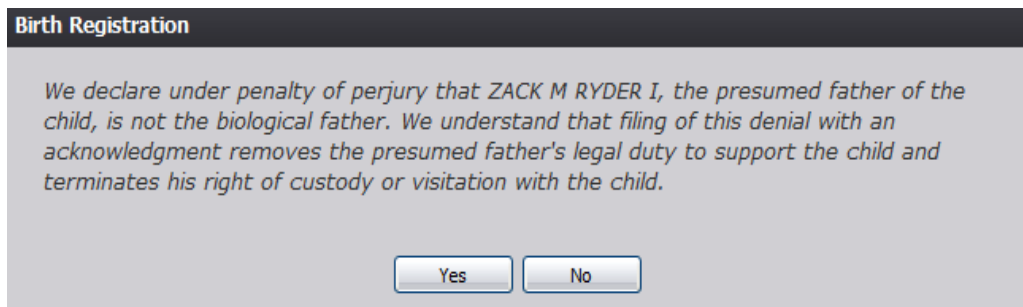
Figure 61: DOP Certification Screen

4. Click the **Yes** button to open the desired DOP Signature screen.

    a. Click **No** to close the message and return to the Birth Registration screen.

5. The DOP Signature screen will appear. Click the Upload tab on the DOP Signature screen:
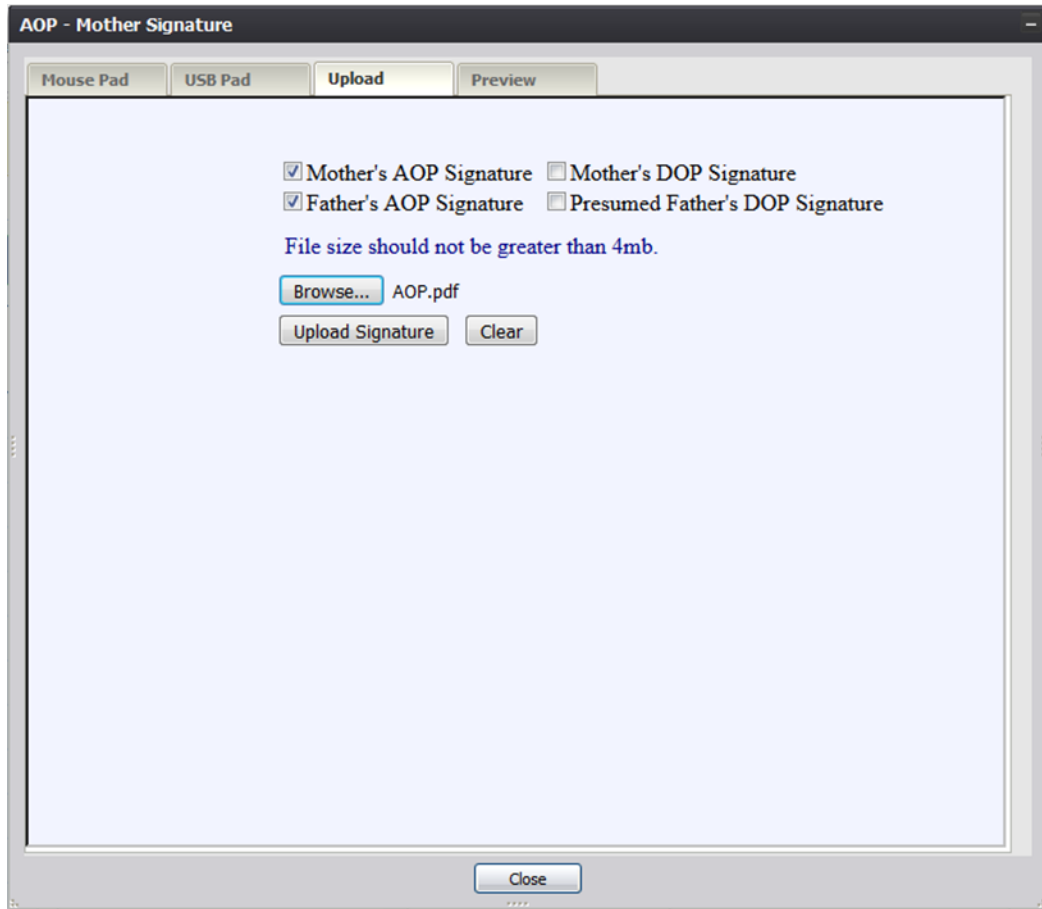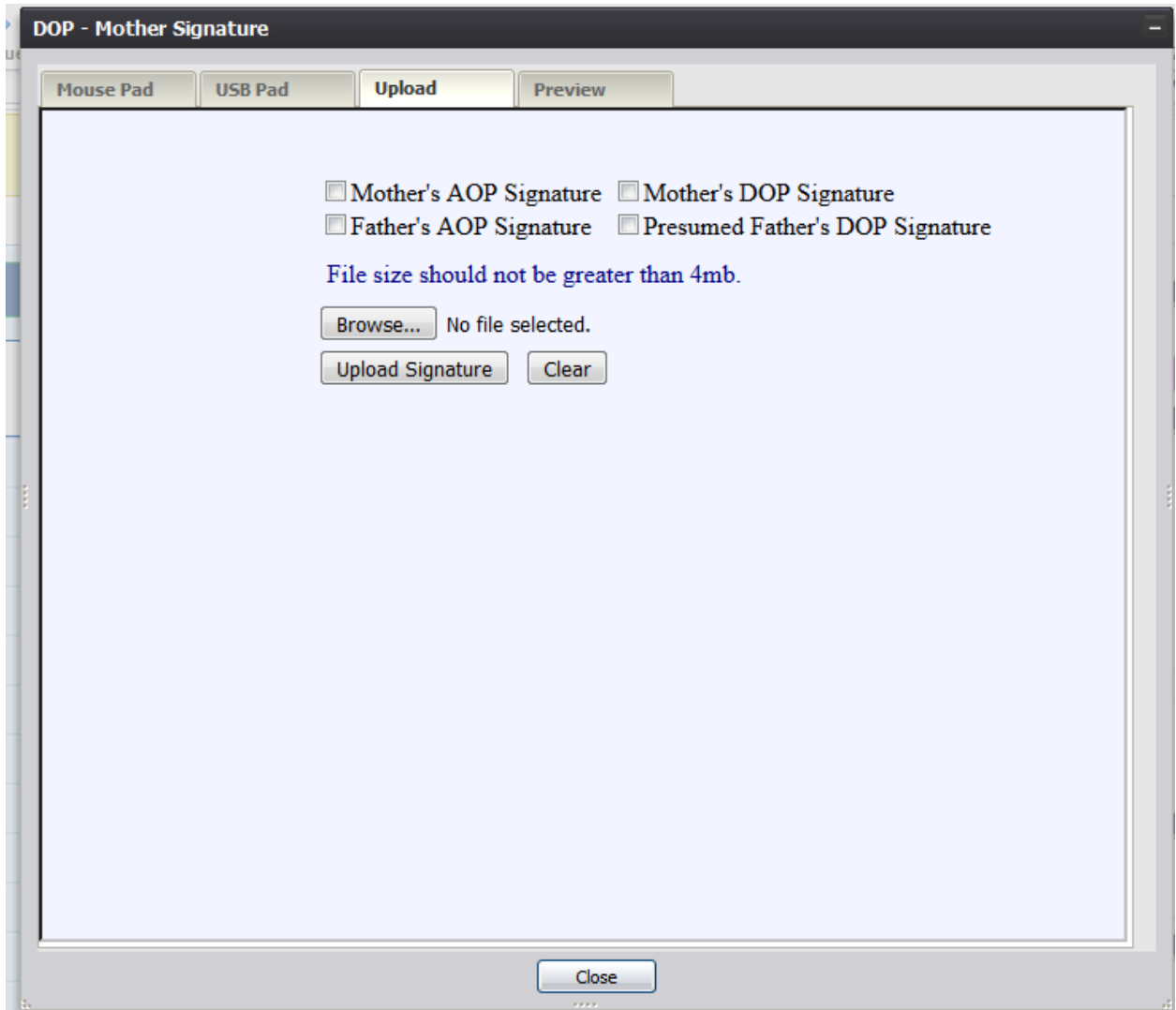
Figure 62: DOP Signature Screen-Upload Tab

6. Select the checkboxes corresponding to the signatures captured on the scan of the paper copy AOP form to be uploaded into TxEVER.

7. Click the Browse button to open the File Upload screen, locate the scanned AOP form and click the Open button.

8. Click the Upload Signature button.

9. The system will display the following message:
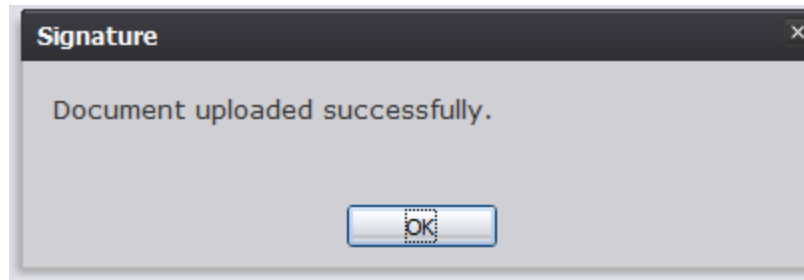
Figure 63: Document Uploaded Successfully Message

4.11.3 Capture Verification of Birth Facts Signatures

The application provides local users the ability to capture Verification of Birth Facts signatures using one of three available methods:

4.11.3.1 Capture Verification of Birth Facts Signatures Using Mouse

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Verification of Birth Facts** menu and select either the Mother Signature menu item or Father Signature item.

3. The Verification of Birth Facts Signature screen will appear:
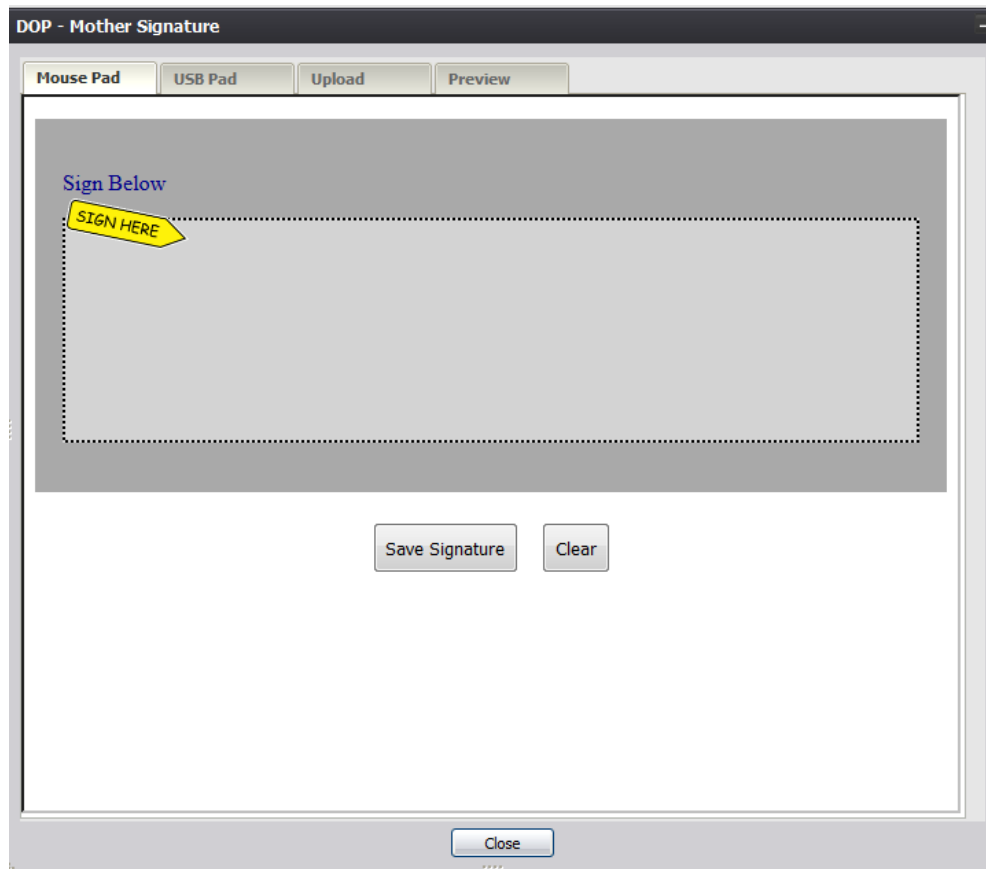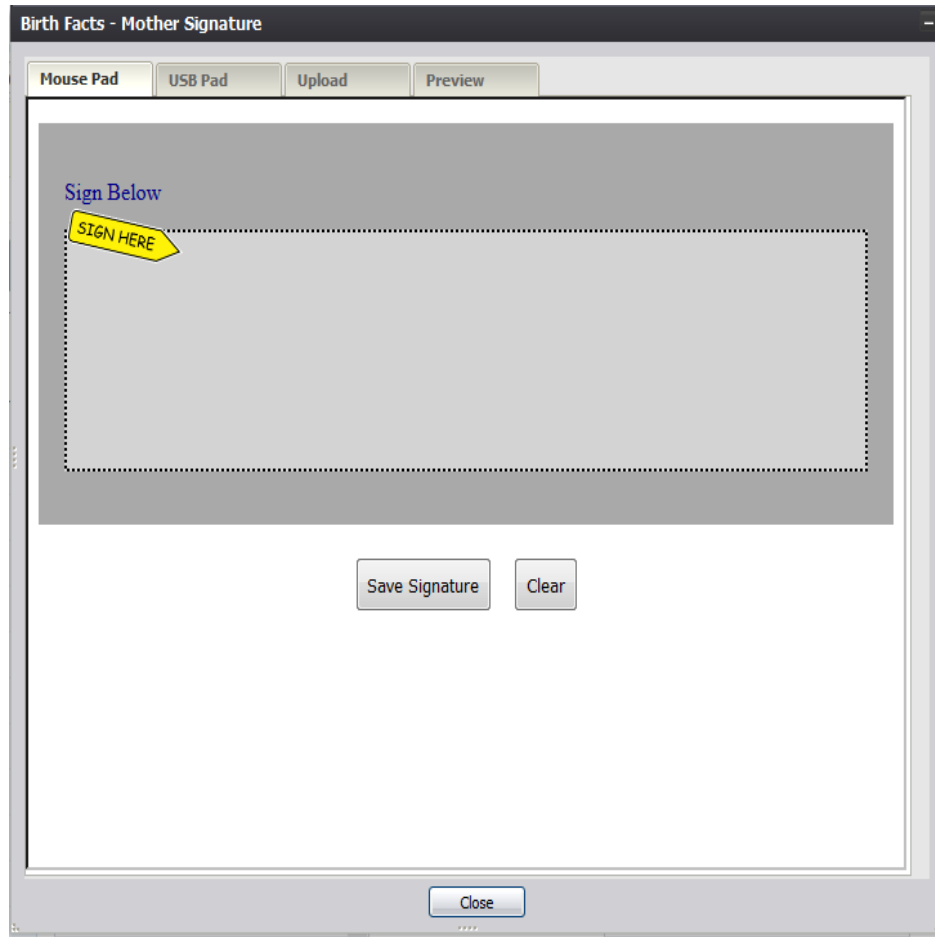
Figure 64: Verification of Birth Facts Signature Screen-Mouse Pad

4. Create a signature by holding down the left mouse button and moving the mouse on the screen in the signature box.

5. Click the Save Signature button.

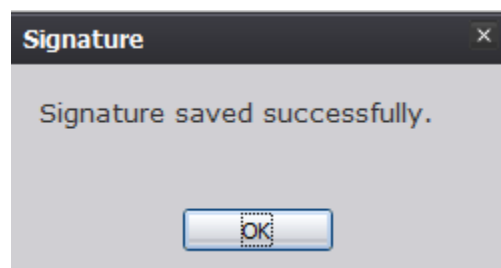6. The system will display the following message:
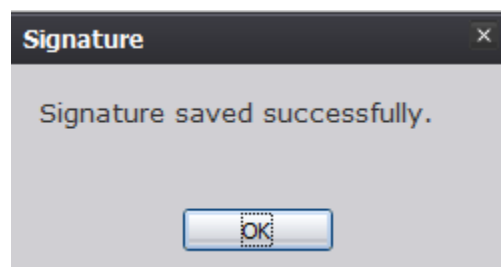
Figure 65: Signature Saved Successfully Message

4.11.3.2 Capture Verification of Birth Facts Signatures Using USB Signature Pad

1. Retrieve an existing record using the Work Queue Search or the Search screen.

2. Select **the Record/Verification of Birth Facts** menu and select either the Mother Signature item or Father Signature item.

3. The Birth Facts Signature screen will appear. Click the USB Pad tab on the Birth Facts Signature screen:
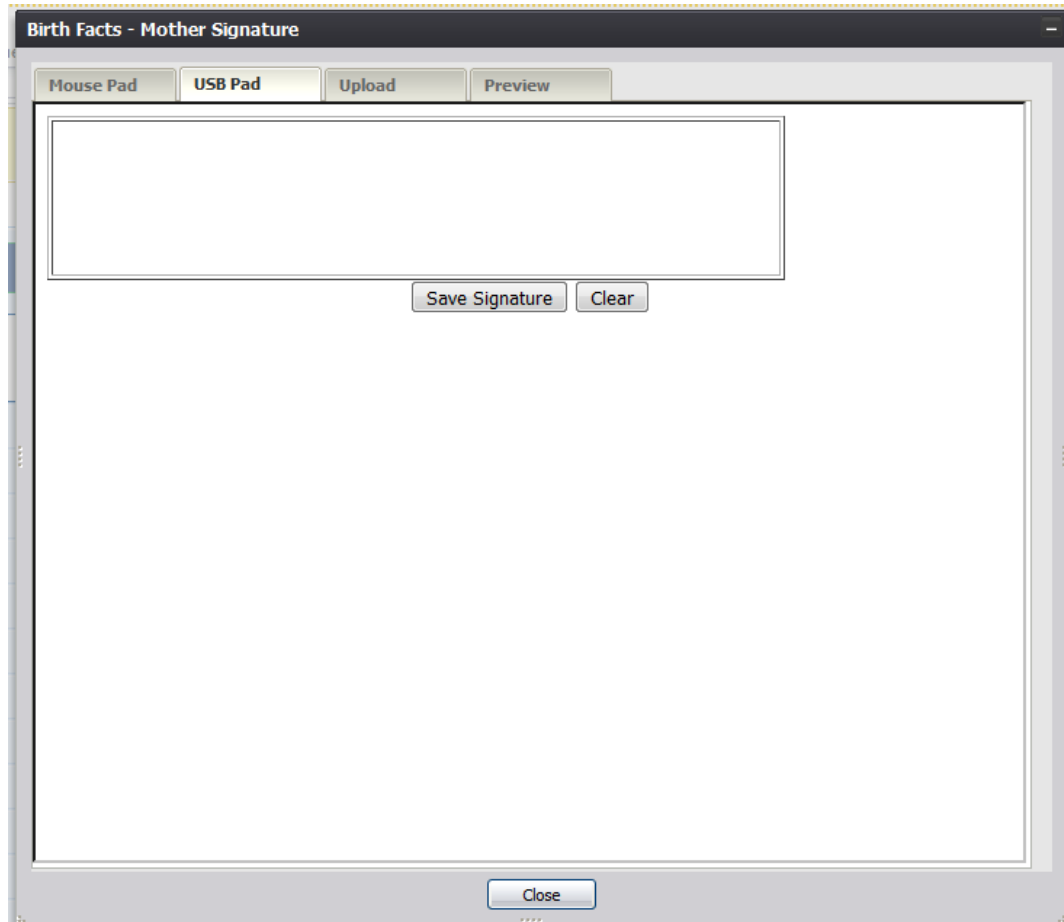
Figure 66: Verification of Birth Facts Signature Screen-USB Pad Tab

4. Create a signature by capturing a signature on a signature pad attached to the computer via USB connection.

5. Click the Save Signature button.

6. The system will display the following message:
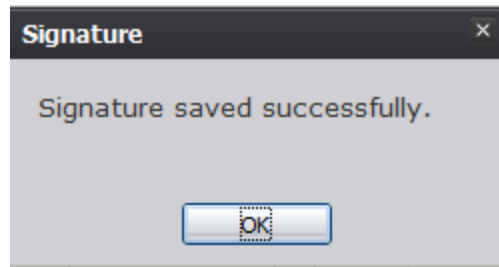
Figure 67: Signature Saved Successfully Message

4.11.3.3 Capture Verification of Birth Facts Signatures Using Form Upload

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Verification of Birth Facts** menu and select either the Mother Signature menu item or Father Signature item.
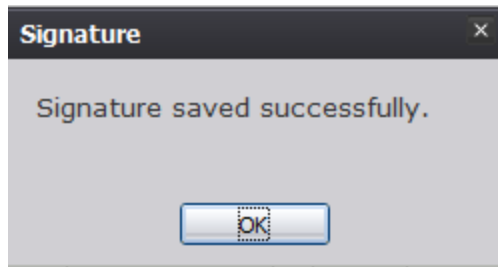
3. The Birth Facts Signature screen will appear. Click the Upload tab on the Birth Facts Signature screen:
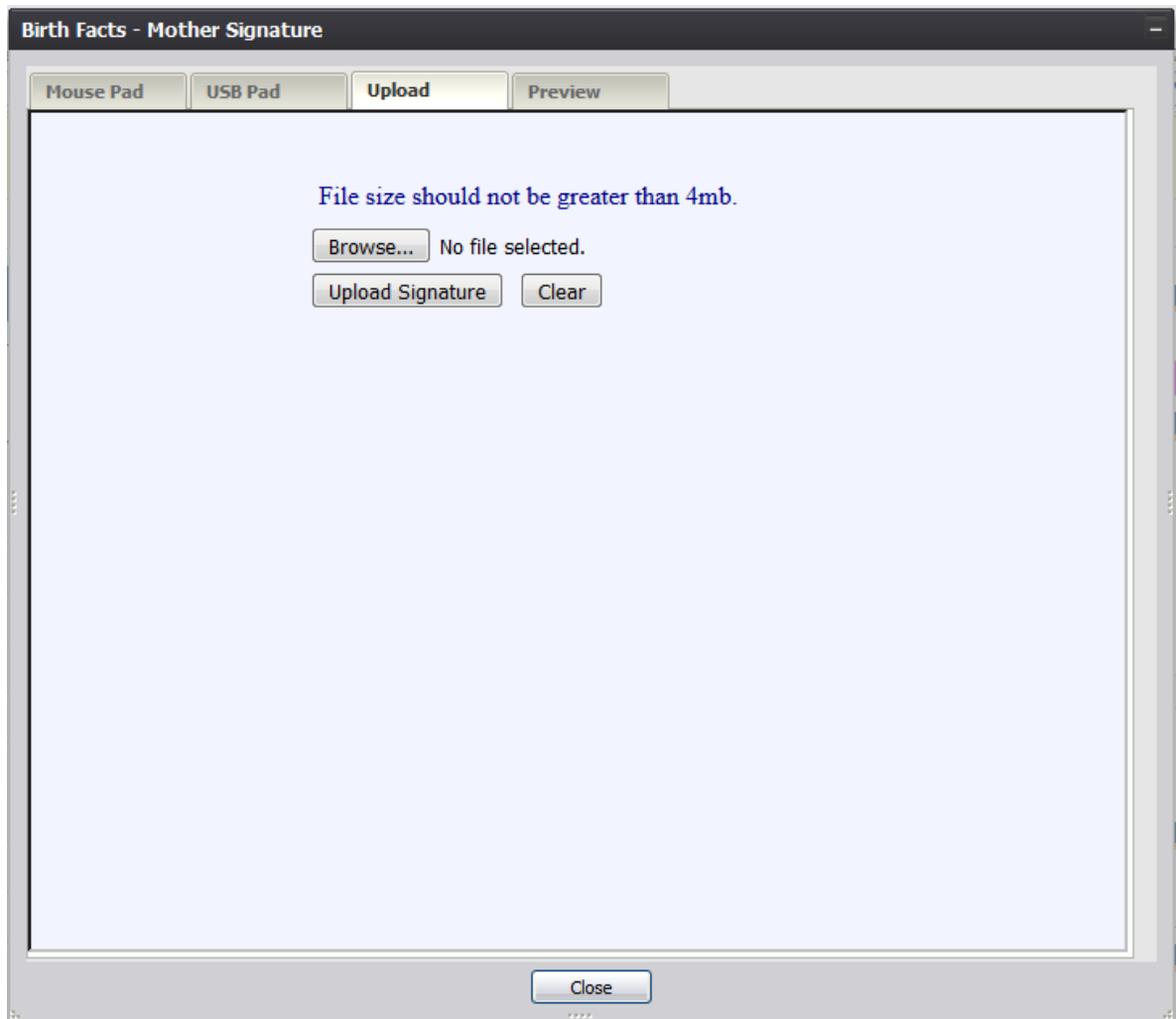
Figure 68: Verification of Birth Facts Signature Screen-Upload Tab

4. Click the Browse button to open the File Upload screen, locate the scanned birth facts form and click the Open button.

5. Click the Upload Signature button.

6. The system will display the following message:
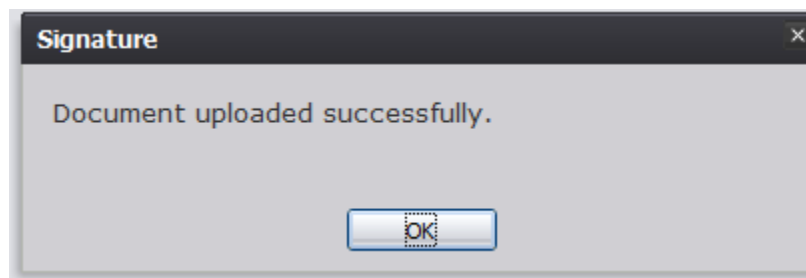
Figure 69: Document Uploaded Successfully Message

4.12 View Signatures

4.12.1 View Acknowledgment of Paternity Signatures

The application provides facility users the ability to view Acknowledgment of Paternity signatures.

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/View Signatures/Acknowledgment of Paternity (AOP)** menu and select either the Mother Signature menu item or Father Signature item.

3. The AOP Signature screen will appear:
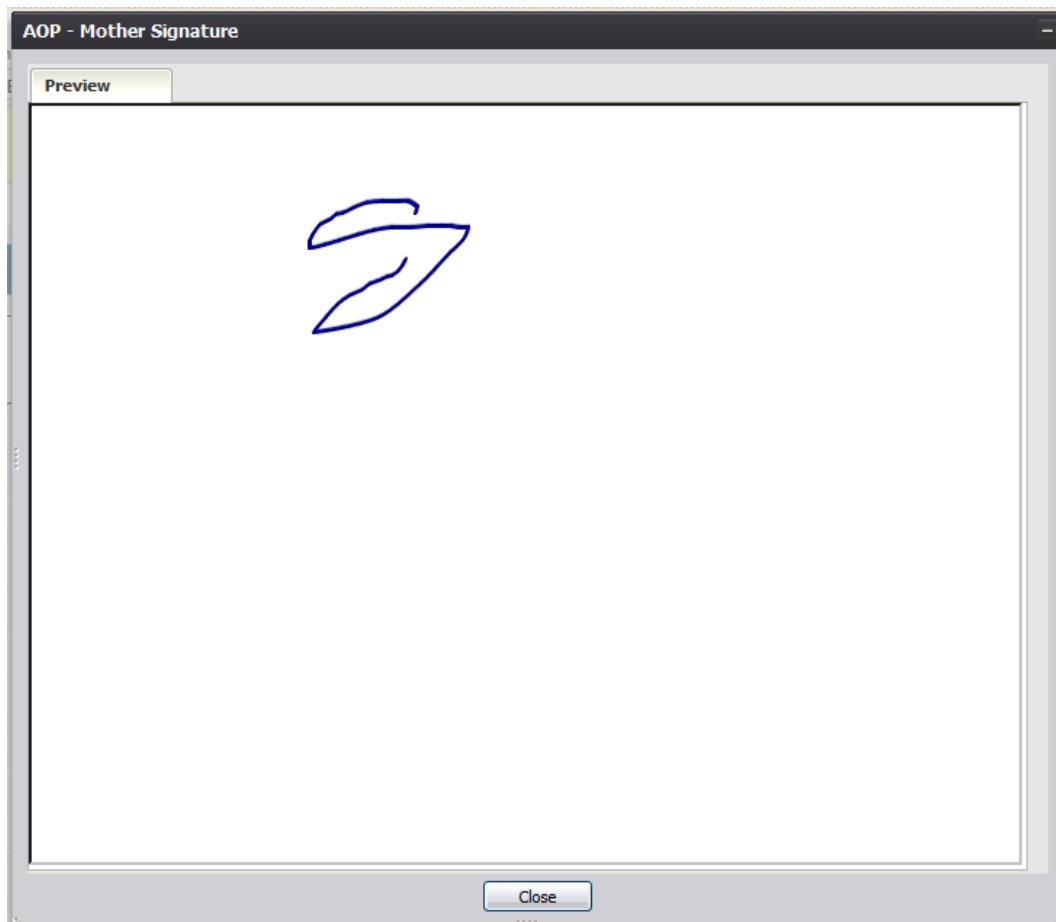
Figure 70: AOP Signature Screen-Preview Tab

4.12.2 View Denial of Paternity Signatures

The application provides users the ability to view Denial of Paternity signatures.

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/View Signatures/Denial of Paternity** menu and select either the Mother Signature menu item or Father Signature item.

3. The DOP Signature screen will appear:
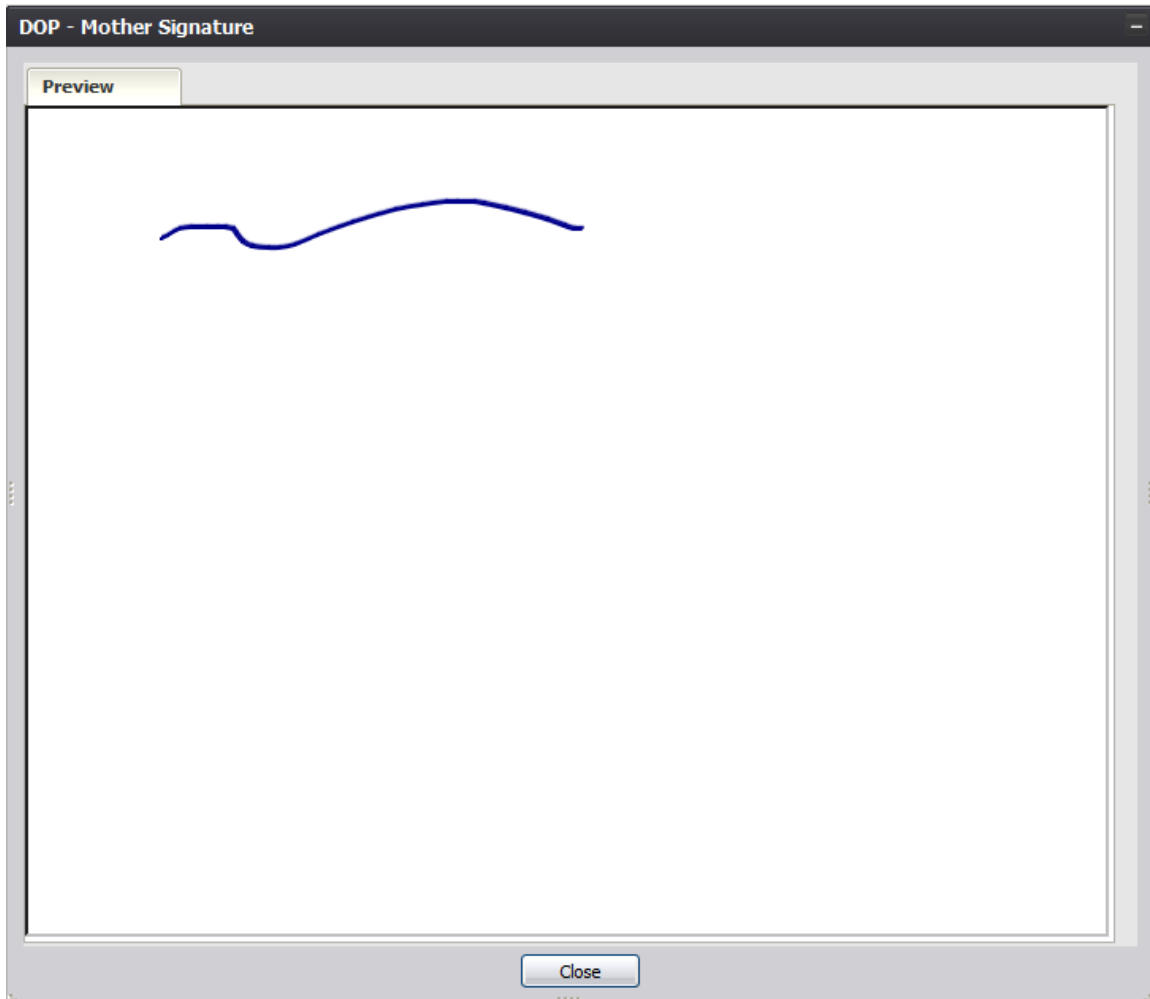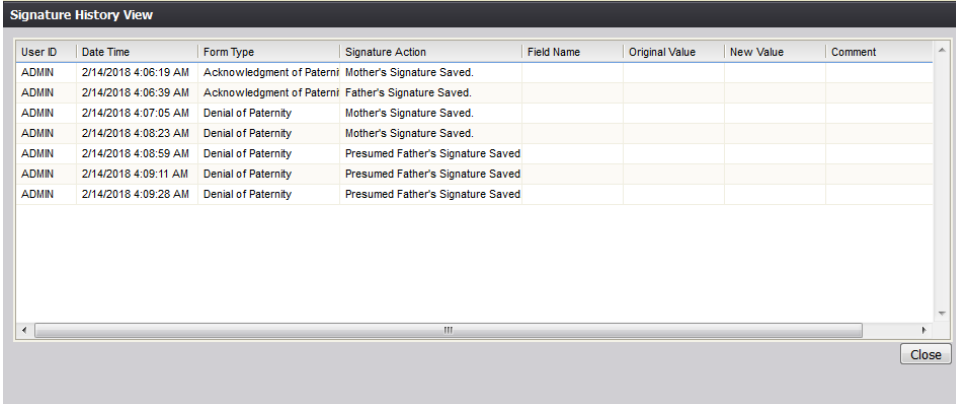
Figure 71: DOP Signature Screen-Preview Tab

4.13 View Signature History
The application provides facility users the ability to view the history of signatures captured on a record.

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Signature History** menu item.

3. The Signature History View screen will appear:

Figure 72: Signature History View Screen

4.14 Search AOP Record
The application provides facility users the ability to search for partial AOPs that match a birth record.

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Search AOP Record** menu item.

3. The AOP-Partial Record Search screen will appear:

Figure 73: AOP-Partial Record Search Screen

4. Click the **Search** button.

5. Matching partial AOPs will be populated in the search results grid.

4.14.1 Link AOP to Birth Record

1. If an AOP record that matches on all of the AOP and birth match fields is found, the search result will have a **Link to Birth Record** link displayed beside it.

   a. Click the **Link to Birth Record** link and the system will display the following message:
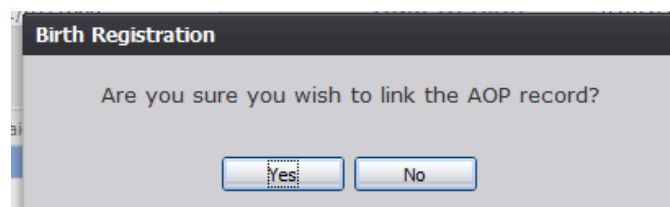
Figure 74: Record Link Confirmation Message

   b. Click **Yes** to confirm the linking of the AOP record to the birth record. Clicking **No** will cancel the process and return the user to the previous screen.

   i. If **Yes** is selected and fields on the AOP Discrepancy list do not match, the following window will appear:
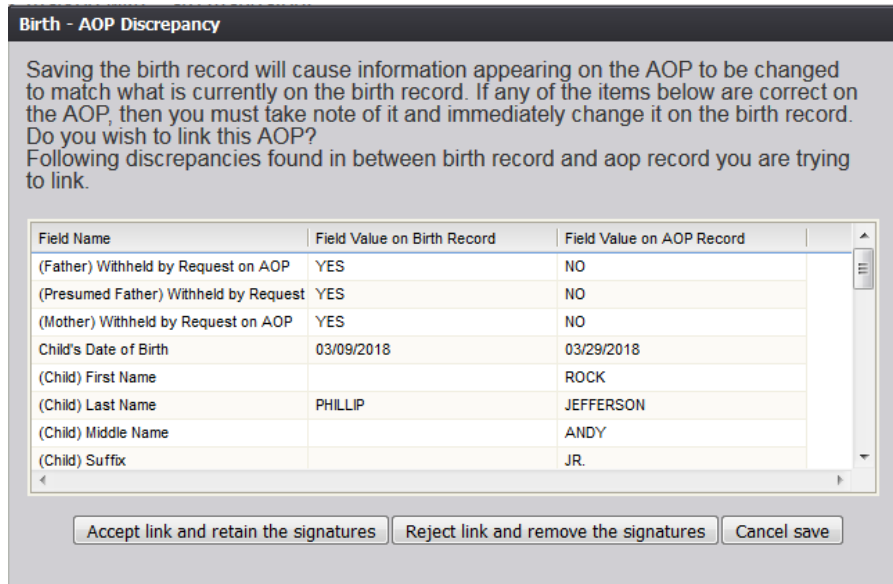
Figure 75: AOP Discrepancy Screen

1. Click the **Accept link and retain the signatures** button to accept the link to the birth record and retain the signatures captured on the AOP record.

2. Click **the Reject link and remove the signatures** button to reject the link to the birth record and remove the signatures captured on the AOP record.

3. Click the **Cancel save** button to cancel the link to the birth record and return to the previous screen.

   ii.   If **Yes** is selected and there no discrepancies between the AOP and the birth record, the system will issue a message that the link has been accepted successfully.

2. If an AOP record that matches on some of the AOP and birth match fields is found, the search result will have an **Update AOP Record** link next to it.

   a. Click the **Update AOP Record** link for the desired search result. The **AOP -Partial Record** screen will open:

Figure 76: AOP-Partial Record Screen

b. Edit the desired fields and click the **Save** button.

c. The system will issue a message that the AOP record has been saved successfully. Click **OK** to close the window and return to the Search screen. The link next to the record will have updated from **Update AOP record** to **Linked (Delink?)**

4.14.2 De-link AOP from Birth Record

1. After locating a previously linked birth record in the AOP search screen, de- link the AOP record from the birth record by clicking on the **Linked (Delink?)** link next to the matching AOP record.

2. The system will display the following message:

Figure 77: Record Delink Confirmation Message

3. Click **Yes** to de-link the AOP record from the birth record. Click **No** to cancel the de-linking of the AOP record from the birth record.

4. The following message will appear:

Figure 78: Scan/Upload Supporting Documentation Message

5. Click **Yes** to scan/upload supporting document. Click **No** to not scan/upload supporting documentation.

6. The following screen will appear:
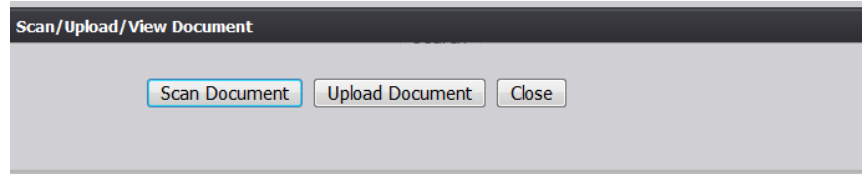
Figure 79: Scan/Upload Document Screen

a. To scan a document, press **Scan Document**, which will generate the following window:
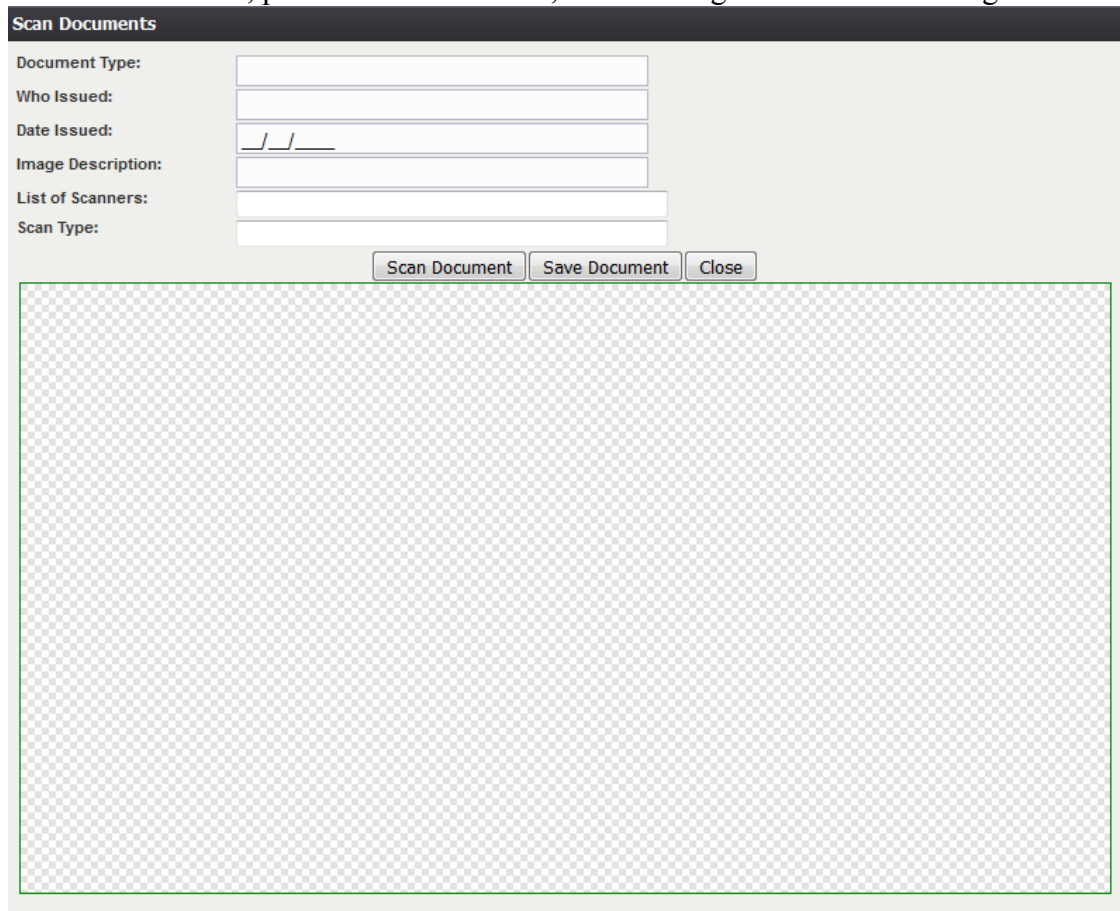
Figure 80: Scan Documents Screen

i. Enter the **Document Type**, **Who Issued** the document, the **Date Issued** and the **Image Description** into the corresponding fields, select the desired scanner from the **List of Scanners**, select RGB from the **Scan Type** and then click **Scan Document**.

ii. Pressing **Scan Document** will load the image in the image preview section of the screen. To save the document, click the **Save Document** button.

iii. A notification will appear when the file has successfully saved or if the save has failed.

b. To upload a document, press Upload Document, which will generate the Upload Document screen.

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

Figure 81: Upload Document Screen

ii. To attach a document, click **Browse** and locate the file. Then, click **Open**. This will load the document file path into the field.

iii. To continue the **Upload** process, click **Upload**. To return to the previous screen, click **Cancel**.

iv. A notification will appear when the file has successfully uploaded or if the upload has failed.

4.15 Printing Forms

4.15.1 Birth Worksheet

Users have the ability to print either an existing or blank birth worksheet, which allows the mother or parents to collect the birth data about a home-birth birth. The Blank Birth Worksheet is provided to the parents of the newborn, but the Local user can also print off a Birth Worksheet that is auto-populated with information from the electronic record.

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Go to **Record/Print/Birth Worksheet** or **Record/Print/Blank Birth Worksheet.**

The application will open the PDF version of the form.

3. Click the **Print** icon in the PDF window to print the document.

4. When the document is printed, close the PDF browser window using the **X** in the upper right corner of the screen to return to the TxEVER system.

4.15.2 Verification of Birth Facts

This form is required when the Local completes all birth fact fields. The Local must print the form and the parents must check and verify the form to make sure the information is correct.

1. Retrieve a record with completed birth fact fields using the Work Queue Search or the Search Screen.

2. Select the **Record/Print/Verification of Birth** Facts menu option.

The application will open the PDF version of the form that allows printing.

3. Click the **Print** icon in the PDF window to print the document.

4. When the document is printed, close the PDF browser window using the **X** in the upper right corner of the screen to return to the TxEVER system.

4.15.3 Acknowledgment of Paternity (AOP)

The **Acknowledgment of Paternity (AOP)** form is available when paternity is established on the birth record and all AOP fields are completed.

1. Retrieve an existing record using the Work Queue Search or the Search Screen to print a pre-populated Paternity Acknowledgement form.

2. Select the **Record/Print/Acknowledgment of Paternity (AOP)** menu option.

The application will open the PDF version of the form.

3. Click the **Print** icon in the PDF window to print the document.

4. When the document is printed, close the PDF browser window using the **X** in the upper right corner of the screen to return to the TxEVER system.

4.16 Electronic Certification

In order to certify a record at the Local level, all of fields need to be resolved before the **Record/Certify** menu item is selected. If required fields are unresolved and the **Certify** menu item is selected, the following message will appear:

Figure 82: Please Resolve All Fields Message

If all of the fields are resolved and the **Record/Certify** menu item is selected, the following message will appear:
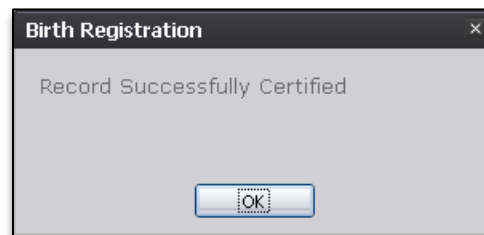
Figure 83: Record Successfully Certified Message

4.17 Releasing a Record

After both **Birth Registration Data Entry** and **Electronic Certification** have been completed, a record is ready to be released and assigned a State File Number.

Note: If AOP is established, the **Date AOP Signed** field in the **Mother** tab needs to be completed before the record can be released**.**

To release a record:

1. Retrieve an existing record using the Work Queue Search.

2. When the appropriate record appears on the screen, select the **Record/Release** menu. Depending on the nature of the record being released, up to two messages will appear.

4.17.1 Release a High Risk Record

If the record being released is that of a high risk birth, the following message will appear:
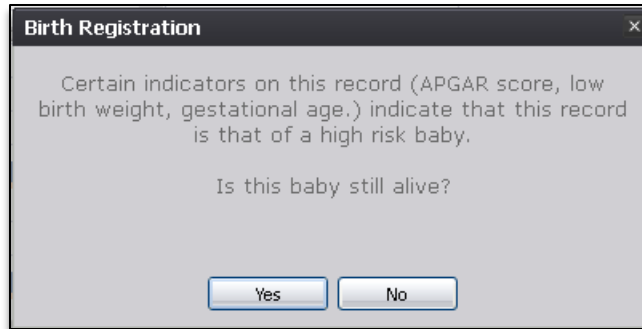
Figure 84: Release of High Risk Record Message

1. If **Yes** is selected, the system will display following message:

Figure 85: Record Release Confirmation Message

   a. Click **Yes** to release the record.

   b. Click **No** to cancel the release of the record.

2. If **No** is selected, the system will display the following message:

Figure 86: Death Record Creation Reminder Message

4.17.2 Release of a Record with an Associated AOP

If the record being released is associated with an AOP and all fields except for **Date Acknowledgment of Paternity Signed** are resolved, the birth clerk should select the **Record /Print/Acknowledgement of Paternity** menu item to print the AOP form. Printing the AOP form is required to release the record if 'Yes' is selected under the **AOP Involved** tab of the **Mother** section on the **Birth Registration**.

The following message will appear if the AOP form is printed:
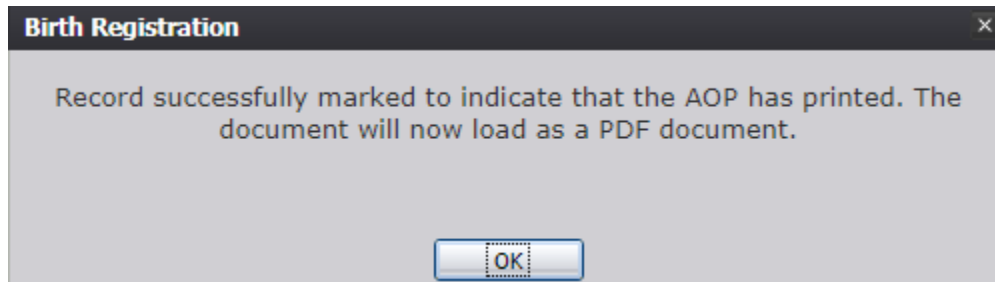
Figure 87: AOP Printed Message

1. Click **OK** to print the Acknowledgment of Paternity form.

2. The Date Acknowledgment of Paternity Signed field in the Mother tab needs completed before the record can be released. Resolve the field and save the record before attempting to release the record.

After saving the record, select the **Record/ Release** menu item. The following message will appear:

Figure 88: Release of Record with AOP Message

    a. Click **OK** to confirm completion of the AOP and release the record.

b. Click **Cancel** to exit the message without confirming completion of the AOP; the record will not be released.

5   Pre/Post Birth AOP Registration

This section provides detailed information about the **TxEVER Birth** application regarding functions related to **Pre/Post Birth AOP Registration.**

5.1   Start and Save a New AOP

The **Pre/Post Birth AOP Registration** menu item function allows authorized users to create/initiate an AOP within the **TxEVER Birth** module.

1. Select the **Birth/Function/Pre/Post Birth AOP Registration** item to initiate a new AOP record.

2. The initial **Pre/Post Birth AOP Registration** screen will appear.

Figure 89: Pre/Post Birth AOP Registration Screen-Initial Load

3. After clicking the **New** icon or selecting the **Record/New** menu item, the focus is initially set on the **Record Type** field. This is a mandatory field and the user cannot start a record without selecting an acceptable value in the mandatory field. Select the record type from the drop-down list and press **Tab** to unlock record fields for data entry.

4. Enter all available information about the AOP into the following fields:

Field Name	Value Required
Record Type	Select a record type from the dropdown list
Plurality	Select the number of children delivered
Child Last Name	Enter Text
Child Date of Birth	Enter Date
Mothers Last Name	Enter Text

5. Minimally, the user must enter values into all fields listed above and select the **Record/Save** menu item, or click the **Save** button.

6. The system will display the following message:
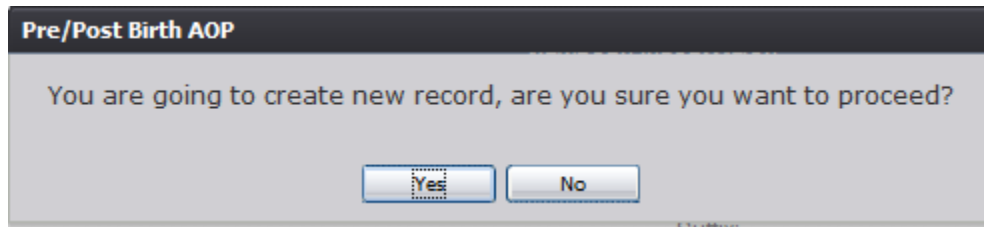
Figure 90: Record Creation Confirmation Message

7. If the user selects **No**, the record will not be saved.

If the user selects **Yes**, the application will save the record and the following message will be displayed:
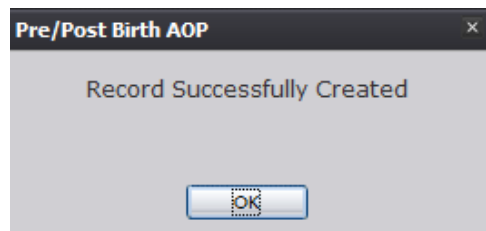
Figure 91: Record Successfully Created Message

8. Proceed with AOP registration data entry by completing the information requested on the AOP registration data entry screen. See Technical Pre/Post Birth AOP Registration Data Entry Tips for more details on how to complete the record.
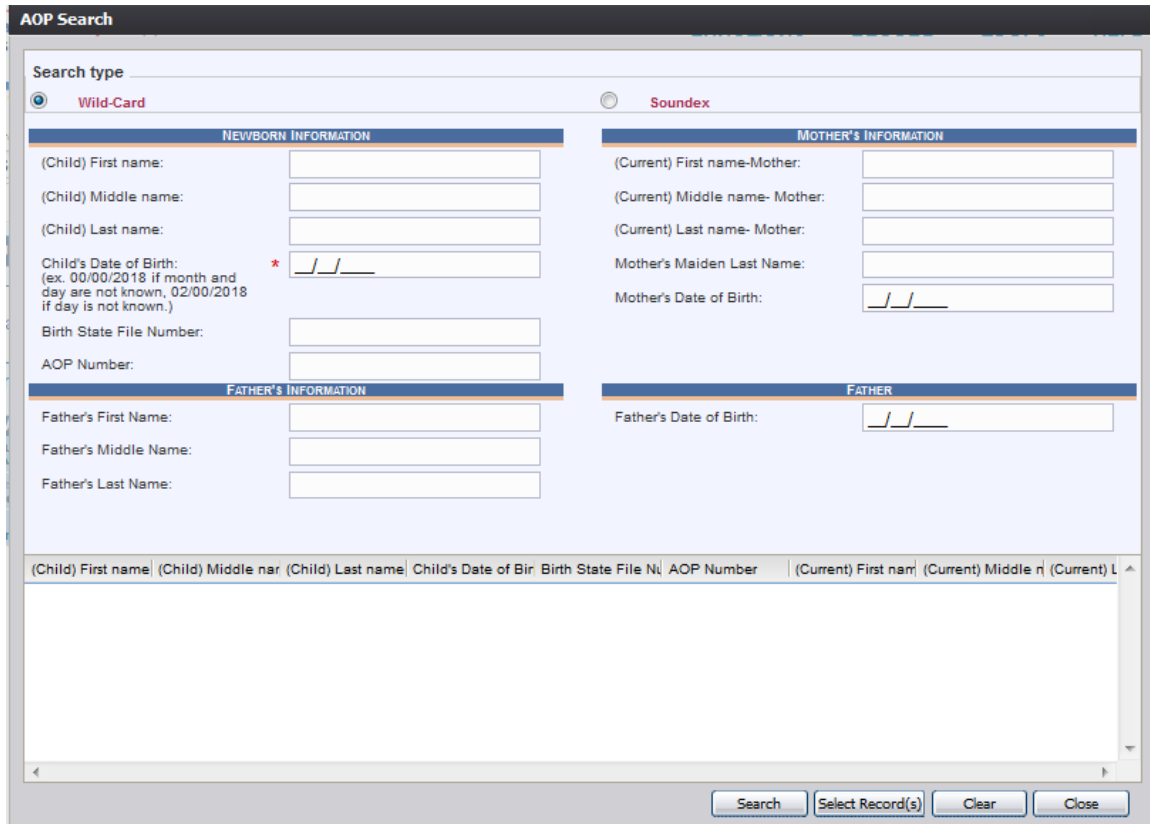
5.2 Search for a Record

Searching for a record in the application can be accomplished using the following options:

- Search Screen
- Work Queue search

5.2.1 Search Screen

1. Click the **Search** icon   🔍   or select the **Record/Search** menu item.

2. The **Search Record** screen will appear.

Figure 92: AOP Search Screen

3. Enter all available information regarding the record that needs to be located.

   ✓ **Tip**: Text fields such as names do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.

   ✓ **Tip**: Along with a name, including the year of birth (which can be entered as a series of 00s followed by a year - i.e. 00/00/2012) and other information will reduce the number of matches that are returned and cause faster search results.

   ✓ **Tip**: Choosing Soundex still requires the user to enter at least the Child's year of birth. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound

familiar as well.

4. Click **Search**.

5. Records that match the search criteria will populate in the grid in the lower half of the screen.

Figure 93: AOP Search Screen with Results

6. Click the appropriate record to select. Select multiple records by holding down the **Ctrl** key and clicking on records.

7. Click **Select Record(s)** to retrieve records to the Work Queue.

8. Select a record from the work queue by clicking on it to retrieve it to the screen.

9. The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional review and/or processing.

5.2.2 Work Queue Search

The Work Queue in the **Pre/Post Birth AOP Registration** process will contain the following:

- AOP records associated with the user's login location that still require some type of action.

- The list in the work queue will be sorted by the date of birth and will display the child's

last name, child's first name, and child's date of birth.

1. From the drop-down list, set the filter for the appropriate record type, as shown below. Options include:
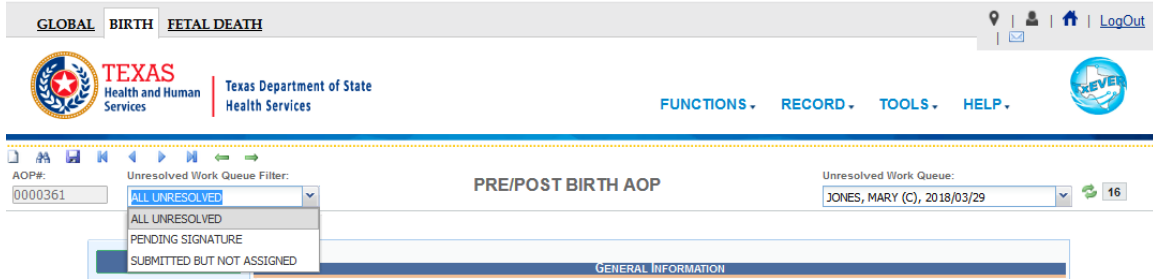
Figure 94: Unresolved Work Queue Filter

- **All Unresolved**: All AOP records that have been started but the information is not yet complete.

- **Pending Signature**: All records where AOP data entry is complete but the signatures have not yet been captured.

- **Submitted but Not Assigned**: All AOP records which have been submitted but not assigned to a birth record.

2. From the record list, select the appropriate record by clicking on it, or with the focus on the list, start typing the child's last name.
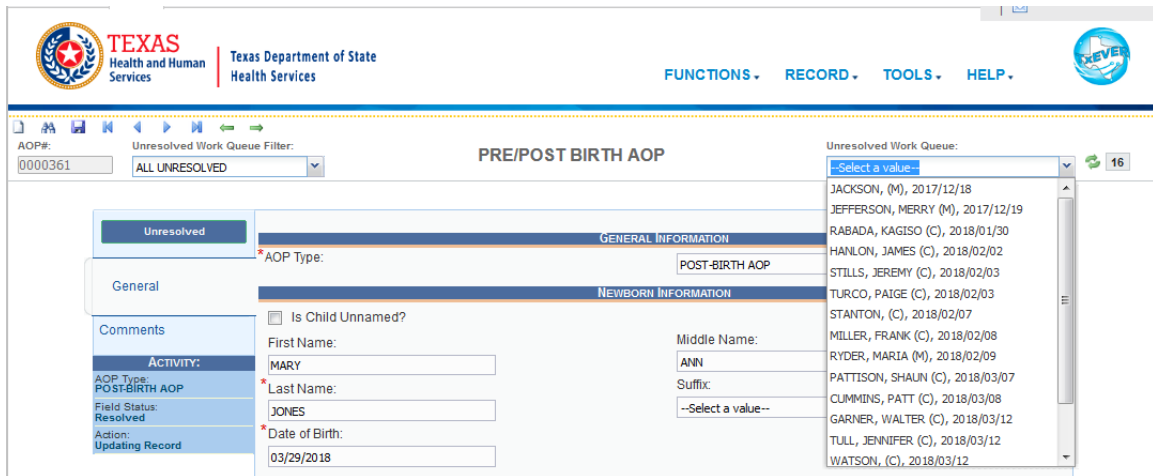
Figure 95: Unresolved Work Queue

3. The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional review and/or processing.

5.3 Search for a Partial AOP Match
The application provides users the ability to search for partial AOPs that match an AOP record.

1. Retrieve an existing record using the work queue search or the search screen.

2. Select the **Record/Search for Partial AOP Match** menu item.

3. The AOP-Partial Record Search result screen will appear:
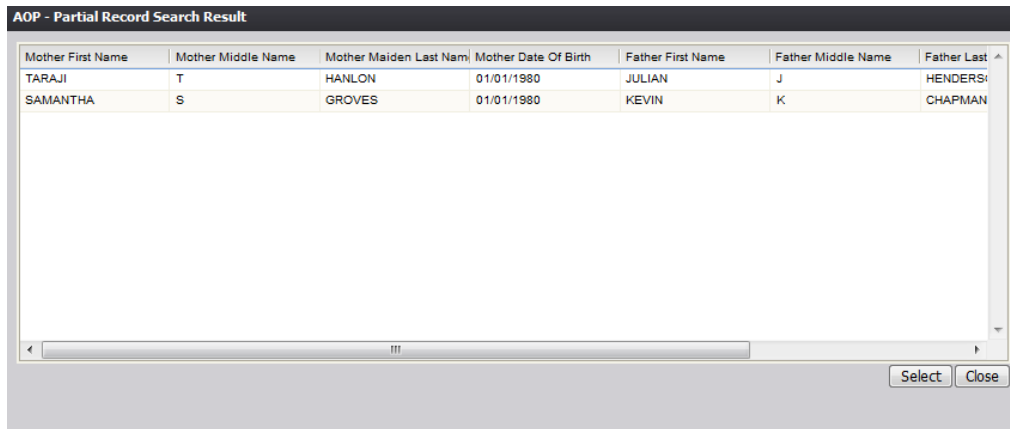
Figure 96: AOP-Partial Record Search Result Screen

    a. If no matches are found, the system will display a message that no records are found.

4. Click the desired search result to select it and click the **Select** button.

5. If discrepancies are found, the **AOP to AOP Discrepancy** screen will appear:
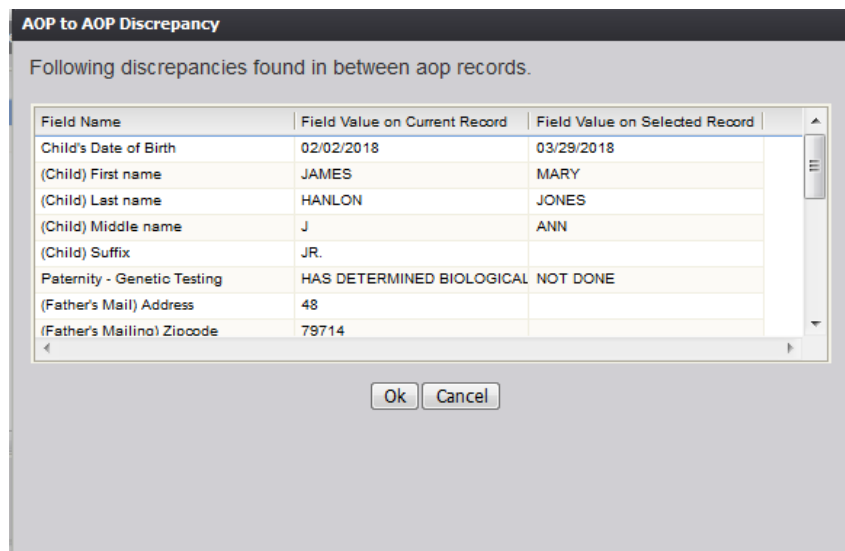
Figure 97: AOP to AOP Discrepancy Screen

6. Click the **OK** button to load the AOP record in the **Pre/Post AOP Registration** screen.

    a. Click the **Cancel** button to close the AOP to AOP Discrepancy screen.

5.4   Cancel Changes

A user may cancel changes made to a record since it was last saved in **Pre/Post Birth AOP Registration**.

1. Retrieve an existing record using the work queue or the search screen.

2. Enter information or modify information entered in any fields. If a user navigates away from the current record by completing such an action as initiating a record search or accessing a new record, the system will display the following message:
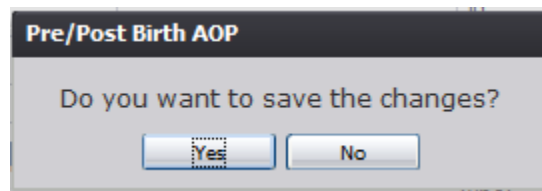
Figure 98: Save Changes Confirmation Message

    a. Click **No** to cancel the changes made to the record.

    b. Click **Yes** to save the changes made to the record.

        i. If signatures have already been saved on the record, a screen similar to the one shown below will appear:
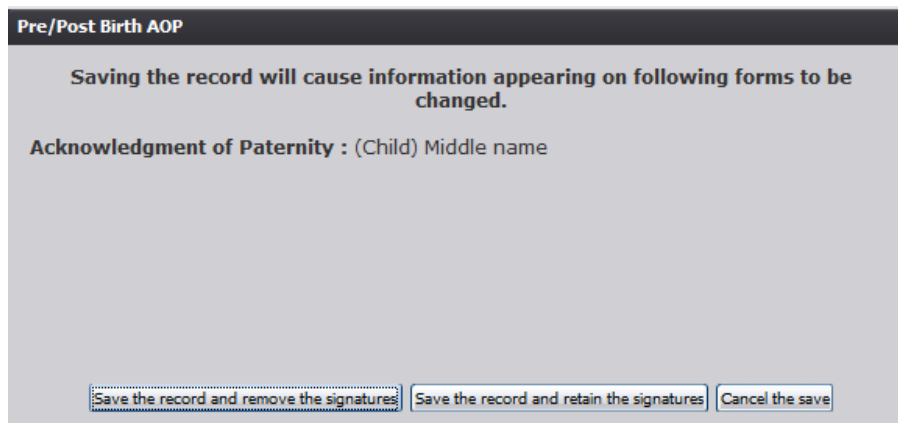
Figure 99: AOP and DOP Signature Removal Screen

      a) Click the **Save the record and remove the signatures** button to save changes to the record and remove previously captured signatures.

      b) Click the **Save the record and retain the signatures** button.

i. The following screen will appear:

Figure 100: Retain Signature Comment Screen

ii. Enter a reason for retaining the signature(s) and click the **OK** button to save the record and retain the signatures or click the **Close** button to return to the previous screen.

iii. The following screen will appear:
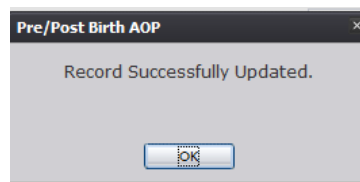
Figure 101: Record Successfully Updated Message

c) Click the **Cancel the save** button to cancel the save and return to the previous screen.

5.5 Update a Record

The **Pre/Post Birth AOP Registration** menu item function allows authorized users to create/initiate an AOP record as well as update an existing record within the **TxEVER Birth** module.

1. Select the **Birth/Function/Pre/Post Birth AOP Registration** menu item.

2. The initial **Pre/Post Birth AOP Registration** screen will load:

Figure 102: Pre/Post Birth AOP Registration Screen-Initial Load

3. Search for a record using the search screen or the unresolved work queue and update unresolved fields on the record that is retrieved on the screen.

4. While a record with unsaved changes is on screen, select the **Record/Save** menu option, or click the **Save** button.

5. The following message will appear:
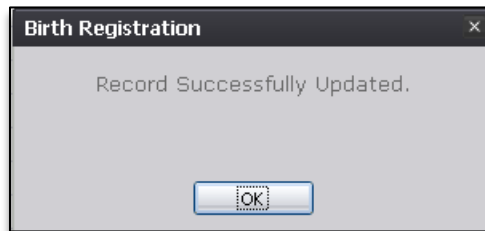
Figure 103: Record Successfully Updated Message

6. All previously unsaved changes made to the record will be saved.

7. Proceed with pre/post birth AOP registration data entry by completing the information requested on the data entry tab.

5.6 Abandon a Record

Any user can choose to abandon a record up until the record is submitted.

1. To abandon the record, select **Record/ Abandon** or the Abandon icon .

2. The following message will appear:
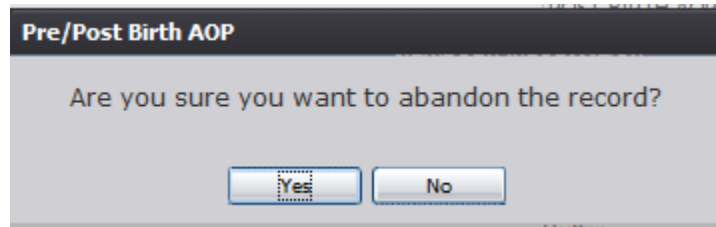
Figure 104: Record Abandon Confirmation Message

3. Select **No** to cancel the action and return to the record or select **Yes** to continue abandoning the record. Provide a reason for abandoning the record in the Comment box shown below and press **OK**.
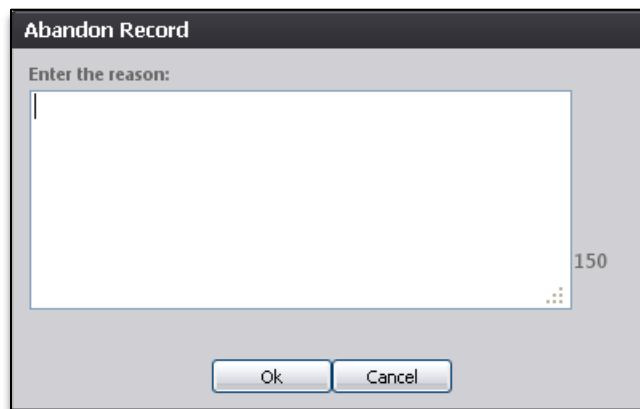
Figure 105: Abandon Record Comment Screen

4. The following message will appear:
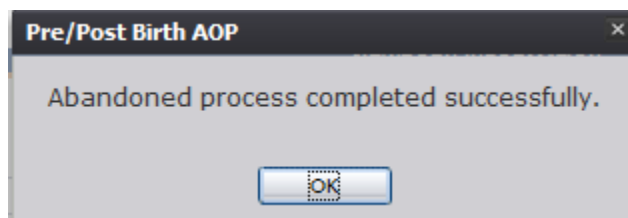
Figure 106: Record Abandoned Successfully Message

5.7   Using the Unresolved Fields List

To check if all data items were completed, use the **Unresolved Fields** list to identify areas that require some sort of action before the record is resolved. The unresolved list displays individual data fields that need to be completed for a specific record before it can be resolved.

1.   Retrieve a record.

2.   Click **Unresolved** to open the list.

3.   The **Unresolved Fields** list will open.
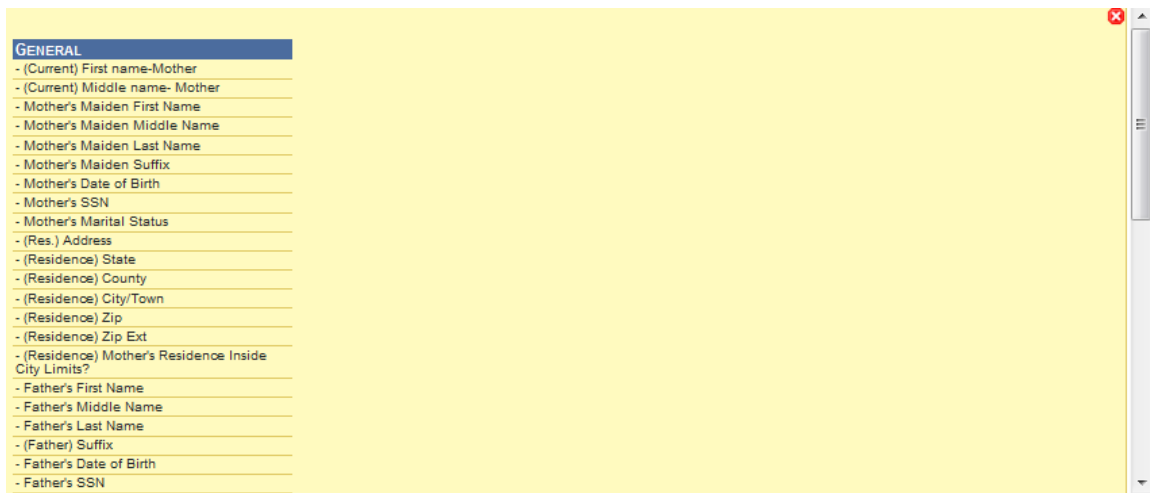
Figure 107: Unresolved Fields List

4.   To be directed to a particular unresolved field, click the field's link. The system will navigate to that particular field directly so that it may be resolved; the **Unresolved Fields** list will close.

5.   Click **Unresolved List** again to close the list and return to the data entry screen.

5.8   Pre/Post Birth AOP Registration Data Entry Topics

5.8.1   Double Data Entry

Certain fields (such as Newborn First Name) within the Birth Registration Data Entry screen will require that the user enter the value into the main data entry screen and then confirm the entered value by entering it again in a separate data entry interface. Fields that require double data entry will present users with the following screen when the user tabs off the field:
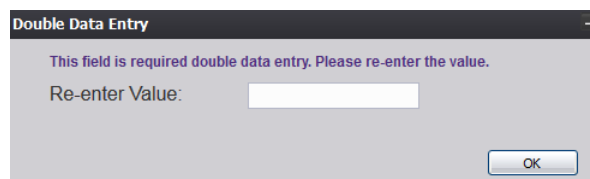
Figure 108: Double Data Entry Screen

Enter the value again and click the **OK** button to close the Double Data Entry screen. If the value entered in the Double Data Entry screen matches the value entered on the main data entry screen, the user will be moved to the next data field. If the values do not match, the following message will appear:

Double Data Entry Error ✕
The values you have entered did not match. Please try again!
OK
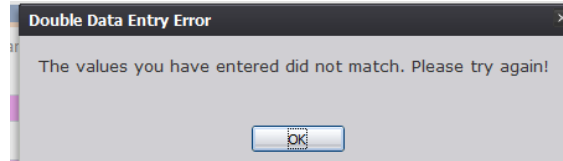
Figure 109: Double Data Entry Error Screen

Click **OK** to close the message and return to the data entry screen. The value entered into the field will be cleared and the double data entry process will be required again.

5.9   Technical Pre/Post Birth AOP Registration Data Entry Tips

5.9.1   General Tab

5.9.1.1   Is Child Unnamed? Checkbox
Selecting the 'Is Child Unnamed?' checkbox will cause the First Name and Last Name fields in the **Newborn Information** section to become populated with a value of 'Infant' and disabled.

5.9.1.2   Common Law Involved
The **Common Law Involved** field will become enabled only if 'Married' is selected in the **Marital Status** field.

MOTHER'S INFORMATION

First Name: Middle Name:

*Last Name: Suffix:
PATTISON   --Select a value--

Maiden First Name: Maiden Middle Name:

Maiden Last Name: Maiden Suffix:
                                               --Select a value--

Date of Birth: SSN:
__/__/____   ___-__-____

Marital Status: Married within 300 Days?
MARRIED   YES

Common Law Involved:

Figure 110: Common Law Involved Field

5.9.1.3   Withheld by Request on AOP Checkbox

Checking this box in the Mother's Residence Address Information section will cause the mother's residence address information to appear as blank on the printed AOP form.

The same functionality applies for the Withheld by Request on AOP checkbox in the Father's Mailing Information section.

5.10 Capturing Signatures

Refer to the Capturing Acknowledgement of Paternity Signatures and Capturing Denial of Paternity Signatures section of this document.

5.11 View Signatures

Refer to the View Acknowledgment of Paternity Signatures and View Denial of Paternity Signatures section of this document.

5.12 View Signature History

Refer to the View Signature History section of this document.

5.13 Submit an AOP Record

An AOP record can be submitted once the required data entry has been completed.

To submit an AOP:

1. Retrieve an existing record using the Work Queue search.

2. When the appropriate record appears on the screen, select the **Record/Submit** menu item to initiate the **Submit** process.

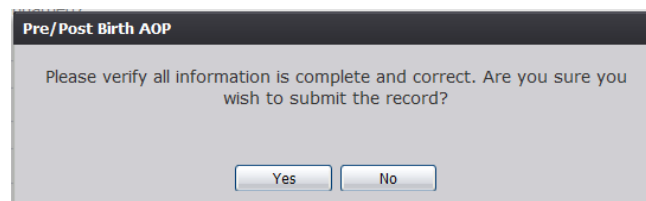3. The following message will appear:

Figure 111: Submission of AOP Confirmation Message

- Click **Yes** to submit the record.
- Click **No** to cancel the submission of the record.

4. If Yes is selected, the following message will appear:
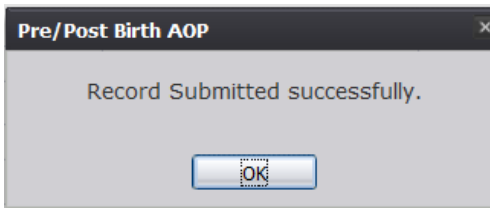
Figure 112: Record Submitted Successfully Message

Note: An AOP record can be submitted multiple times up until the record is linked to a birth record. At this point, the AOP record can be **RELEASED** from the work queue. Once a record has been submitted it will still be available in the work queue.

5.14 Search for a Birth

The application provides facility users the ability to search for birth records that match an AOP record that already has been submitted.

1. Retrieve an existing record using the Work Queue Search or the Search Screen.

2. Select the **Record/Search for Birth Match** menu item.

3. The Birth Record Search screen will appear, pre-populated with information from the AOP record:

Figure 113: Birth Record Search Screen

4. Click the **Search** button.

   a. Click the **Close** button to return to the Pre/Post AOP Registration screen.

5. Records matching the search criteria will be populated in the search results grid:

Figure 114: Birth Record Search Screen with Results

5.14.1 Linking an AOP Record to a Birth Record

1. After locating a birth record in the search screen, link the AOP record to the birth record by clicking on the **Link to Birth Record** link next to the matching birth record.

2. The system will display the following message.

Figure 115: Record Link Confirmation Message

3. Click **Yes** to link the AOP record to the birth record.

   a. Click **No** to cancel the linking of the AOP record to the birth record.

4. The following window will appear:
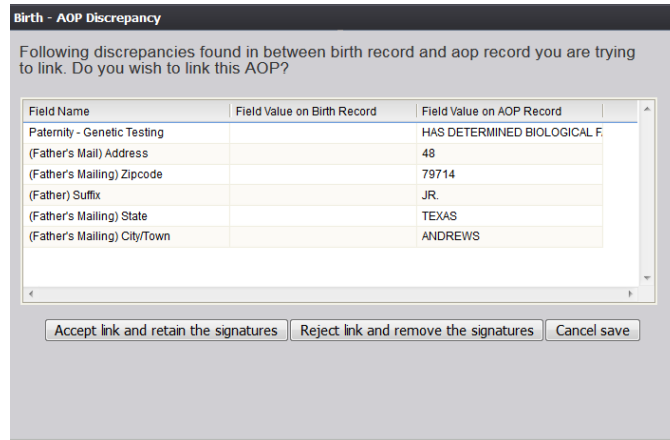
Figure 116: AOP Discrepancy Screen

a. Click the **Accept link and retain the signatures** button to accept the link to the birth record and retain the signatures captured on the AOP record.

 a. Click the **Reject link and remove the signatures** button to reject the link to the birth record and remove the signatures captured on the AOP record.

 b. Click the **Cancel save** button to cancel the link to the birth record and return to the previous screen.

5. The following message will appear:
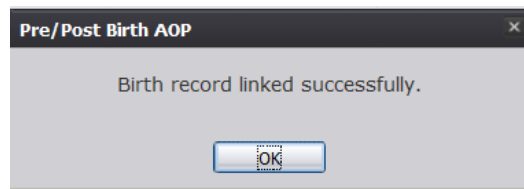
Figure 117: Record Linked Successfully Message

5.14.2 De-Linking an AOP Record From a Birth Record

1. After locating a previously linked birth record in the search screen, de- link the AOP record from the birth record by clicking on the **Linked (Delink?)** link next to the matching birth record.

2. The system will display the following message:
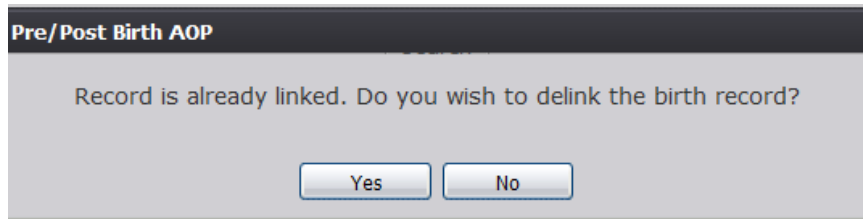
Figure 118: Record Delink Confirmation Message

3. Click **Yes** to de-link the AOP record from the birth record.

   a. Click **No** to cancel the de-linking linking of the AOP record from the birth record.

4. The following message will appear:
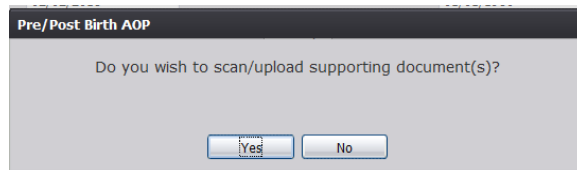
Figure 119: Scan/Upload Supporting Document Confirmation Message

5. Click **Yes** to scan/upload supporting document.

   a. Click **No** to not scan/upload supporting documentation.

6. The following screen will appear:
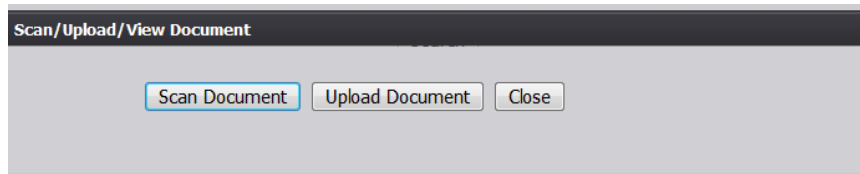
Figure 120: Scan/Upload Document Screen

   a. To scan a document, press **Scan Document**, which will generate the following window:

Figure 121: Scan Documents Screen

    i.   Enter the **Document Type**, **Who Issued** the document, the **Date Issued** and the **Image Description** into the corresponding fields, select the desired scanner from the **List of Scanners**, select RGB from the **Scan Type** and then click **Scan Document**.

    ii.   Pressing **Scan Document** will load the image in the image preview section of the screen. To save the document, click the **Save Document** button.

    iii.   A notification will appear when the file has successfully saved or if the save has failed.

  b. To upload a document, press Upload Document, which will generate the following window:

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

Figure 122: Upload Document Screen

    ii.   To attach a document, click **Browse** and locate the file. Then, click **Open**. This will load the document file path into the field.

    iii.   To continue the **Upload** process, click **Upload**. To return to the previous screen, click **Cancel**.

    iv.   A notification will appear when the file has successfully uploaded or if the upload has failed.

5.15 Release a Record

After Pre/Post Birth AOP Registration and signature capture have been completed and the AOP has been linked to a birth record, an AOP record is ready to be released.

To release a record:

1. Retrieve an existing record using the Work Queue search.

2. When the appropriate record appears on the screen, select the **Record/Release** menu item to initiate the **Release** process.

3. If the record is ready for release, the following message will appear:

Figure 123: AOP Release Confirmation Message

    a. Click Yes to release the record
    b. Click **No** to cancel release of the record.

4. If **Yes** is selected, the following message will appear:
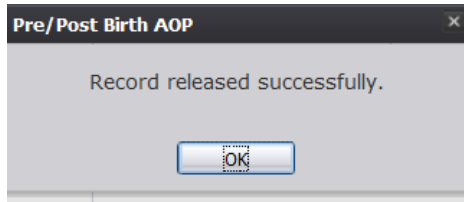
Figure 124: Record Released Successfully Message

5.16 Printing Forms

5.16.1 Print Acknowledgment of Paternity Form

Refer to the [Print Acknowledgement of Paternity Form](#) section of this document.

5.17 Download State Uploaded AOP Forms

The application provides facility users the ability to view and/or download AOP forms uploaded by the State. This can be done from the **Birth Registration** screen.

1. Select the **Birth/Function/Birth Registration** menu item.

2. The **Birth Registration** screen will load.

3. While on the **Birth Registration** screen, select the **Functions/Download State Uploaded AOP Forms** menu item.

4. The **Uploaded AOP Forms to Folder Viewer** screen will appear.

Figure 125: Uploaded AOP Forms to Folder Viewer

6   Local Acceptance and Local Print Queues

Once a birth record has been accepted by the State, it then goes back to the appropriate local facility's **Local Acceptance Queue**. To access the **Local Acceptance Queue** and print a record:

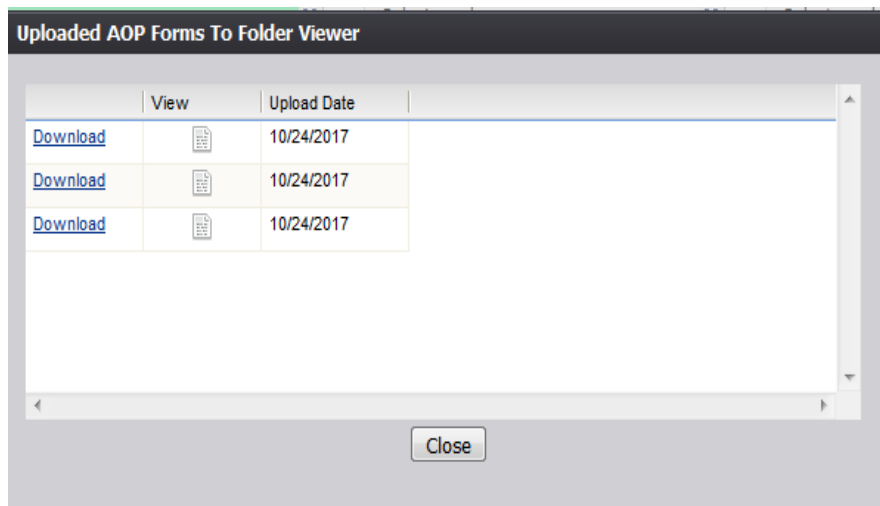1. Go to **Birth/Functions/Local Acceptance** and select the record from the **Unresolved Work Queue** drop down menu.

2. Once the appropriate record is on the screen, users may either click **Record/Accept** or the ✔ icon to accept the record into the print queue.

It is important to note that a record in the **Local Acceptance Queue** can only be rejected if the **Place of Birth** is listed as **'Other.'**

3. Once **Accept** has been selected, the following message will appear:
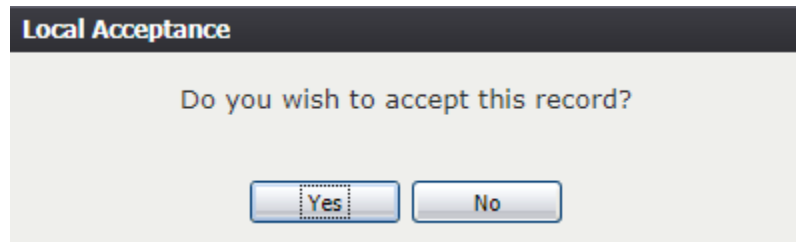
Figure 126: Record Acceptance Confirmation Message

4. Click **Yes** to accept the record and move it to the Local Print Queue. Click **No** to cancel and go back.

5. Once the record has been accepted, the following message will appear. Click **OK** to go back to the main screen:
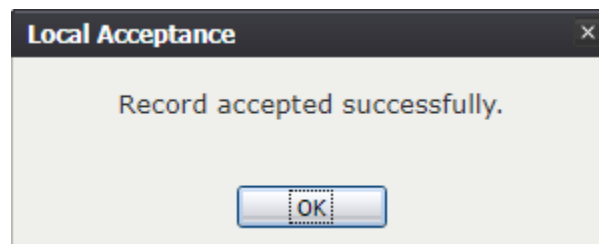
Figure 127: Record Accepted Successfully Message

6. Go to **Functions/Local Print Queue**. Under Document Filter, select **Newly Registered Records** and make sure that the button next to **All Previously Not Printed** is selected. Click **Submit**.

Figure 128: Local Print Queue Screen

7. Go through the list and find the Child's Name of the desired record. Click on the gray box next to the record and select **Print** at the bottom of the screen or **Record/Print**. If multiple records are to be printed, click the boxes next to those records. The following box will appear on the screen:
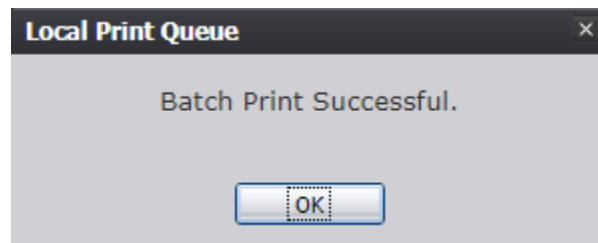
Figure 129: Batch Print Successful Message

8. Click **OK** to pull up the PDF copy of the record(s) and print as needed.

7 Legal View Functions

This section provides detailed information about the Back Office features of the **TxEVER Birth** module regarding record processing and related features available from the **Legal View** screen. Local users can access these Back Office features only if a system administrator assigns the proper security permissions to the Local user.

7.1 Access Legal View

Access the **Legal View** screen by selecting the **Function/Legal View** menu item from the **TxEVER Birth Module Main Menu**.

7.2 Legal View Search Screen

The **Legal View Search** screen is similar to the **Search** screen available from Birth Registration. However, records available for retrieval from the **Legal View Search** screen will only be those records that have been registered and assigned a State File Number.

To retrieve a record from the **Legal View Search** screen:

1. Go to **Function/Legal View** from the **TxEVER Birth Module Main Menu**.

2. Select the **Record/Search** menu item. The **Legal View Search** screen will appear.

Figure 130: Legal View Search Screen

3. Enter all available information regarding the record.

- **Tip**: Text fields, such as names, do not have to be complete. Enter the first several letters instead of the entire text when spelling is in question but include other items to reduce the number of matches.

- **Tip**: Along with a name, including the year of birth and gender and other information will reduce the number of matches that are returned and cause the search to be faster.

- **Tip**: Entering only a key field such as the EBR or Social Security Number will match a single record and result in a rapid response.

- **Tip**: Choosing 'Soundex' still requires the user to enter at least the newborn's year of birth. If the user also decides to search by a name, the full name must be entered and the application will search for not only all exact matches but names that sound familiar as well.

4. Click **Search** to search the database.

> Records that match the search criteria populate the grid in the lower half of the screen.

Figure 131: Legal View Search Screen with Results

5. Click on the appropriate record to select it. Select multiple records by holding down the **Ctrl** key and clicking on multiple records.

6. Click **Select Record(s)** to retrieve records to the work queue.

7. Select a record from the work queue by clicking on it to retrieve it to the screen.

The selected record will be retrieved by the system and its information will appear on the screen as an active record for additional processing.

7.3 Printing from the Legal View Screen

The **Print** function allows users with the proper security process to print certified copies of birth records from the application.

1. Select the **Birth / Function / Legal View** menu item once successfully logged into the proper location.

2. Select the **Record / Search** menu item to retrieve records

3. Retrieve the record for printing from the work queue.

4. When the record is loaded on screen, select the **Record / Print / Complete Legal Version of Birth Certificate (certified/uncertified)** menu item.

5. The certified copy of the birth certificate will load in PDF format in a new browser window.

6. Print the document from the browser window and then close the browser window to return to the application.

The local user can print the following types of forms and certificates depending on what type of record is retrieved on the **Legal View** screen:

- Acknowledgment of Paternity

- Birth Worksheet

- Complete Legal Version of Birth Certificate

- Certificate of Foreign Birth with Statement

- Certificate of Foreign Birth without Statement

- Certified Copy of Delayed Certificate of Birth

- Un-Certified Copy of Delayed Certificate of Birth

- Court Ordered Delayed Certificate of Birth

7.4 View Record Comments

To view all comments on a record:

1. Select the **Birth/Function/Legal View** menu item from the **TxEVER Birth Module Main Menu**.

2. Select a record to view/add comments on through the **Legal View Search** screen.

3. Once the record is on-screen, the user can view any comments made by clicking on **Show Comments**.

LEGAL VIEW

More Info

- **STATISTICAL CORRECTION IN PROGRESS**
Set By : CHSUSER1
Set On : 2/2/2018 1:24:56 PM
Comment: Set By System

- **STATISTICAL CORRECTION PENDING**
Set By : CHSUSER1
Set On : 2/2/2018 1:24:56 PM
Comment: Set By System

Show Comments

- **1/10/2018 4:52:35 PM : parkuser1**
MOTHER'S CURRENT LEGAL LAST NAME MUST BE NOT EQUIVALENT TO MOTHER'S LAST NAME PRIOR TO FIRST MARRIAGE, IF MARITAL STATUS IS ANY MARITAL STATUS THAT INCLUDES MARRIED OR WIDOWED OR DIVORCED. - TESTING IF AN AOP OPTION IS AVAILABLE FOR SURROGACY. - RW 1-10-2017

- **1/10/2018 4:52:35 PM : parkuser1**
INTENDED LAST NAME- MOTHER MUST BE NOT EQUIVALENT TO INTENDED MOTHER'S MAIDEN LAST NAME, IF INTENDED MOTHER MARRIED IS ANY MARITAL STATUS THAT INCLUDES MARRIED OR WIDOWED OR DIVORCED. - MOM KEPT HER LAST NAME WHEN SHE GOT MARRIED. - RW 1-10-2018

- **1/10/2018 5:10:30 PM : parkuser1**
KENTUCKY FRIED CHICKEN AND PIZZA HUT - RW 1-10-2018

Figure 132: Show Comments Section

8   Approvals

Sign-off Sheet

I have read the above TXEVER Birth Module Local User Guide and accept the contents herein written.

Project Sponsor: _____

                                                                 Date

Senior Project Manager: _____

                                                                  Date

Genesis Project Manager: _____

                                                                  Date